

Exporting Data from GenX into Microsoft Excel or a Text File

From time to time you may find that you would like to retrieve some information from GenX. This could be done in the past, but it was a complicated hours-long procedure that very few attempted. We have now added a module that allows you to extract data from the program quite easily. To access this module while in GenX, click on Inner Office and then Export Data. This will bring up a screen that will facilitate this data extraction.

Behind the scenes in GenX, information you input into a file is stored in tables. It sits there, waiting to be accessed by whatever form, report, or document needs it. We have made four of these tables available on the Export File Information screen that comes up when you click on Export Data.

As an example of how this process works, let's say you want to see the full first Seller's Name, Sales Price, and Closing Date for all closings done during 2010. Note that you don't have to worry about the Closing Date, as the File Number and File Closing Date are exported automatically for each file. You would therefore only need to input the dates you are seeking the information for and the fields you want, in this case the Seller's Name and Sales Price. The Seller's Name information is in the Sellers Table. In this table, you would double-click on Seller 1 First, Seller 1 MI, and Seller 1 Last. The Sales Price is in the NewMast table. To export the Sales Price, you would double-click on Sales Price in the NewMast table. By the way, if you change your mind about any of these fields, you would just double-click to remove them.

Then "grab all the files between" January 1, 2010 "and" December 31, 2010 (these dates are inclusive), choose either Excel File or Text File, and click Export. Make sure you remember where you save the file.

If you export the data to Microsoft Excel, you can sort, format, or move the information as you please.. The fields you chose are at the top of each column. Try this module out so that you become familiar with it's capabilities. Feel free to call us with any questions you might have. We are sure you will find this feature to be very useful.