

How to Export Data to Excel in Sage 100

Sage 100 lets you export customer records, transaction history, sales orders, and reports directly to Microsoft Excel for further analysis. This guide walks you through exporting data to Excel in Sage 100 from several areas of the application, including Customer Maintenance, the Business Insights Explorer, and the Accounts Receivable Aged Invoice Report, along with tips for formatting the exported data in Excel.

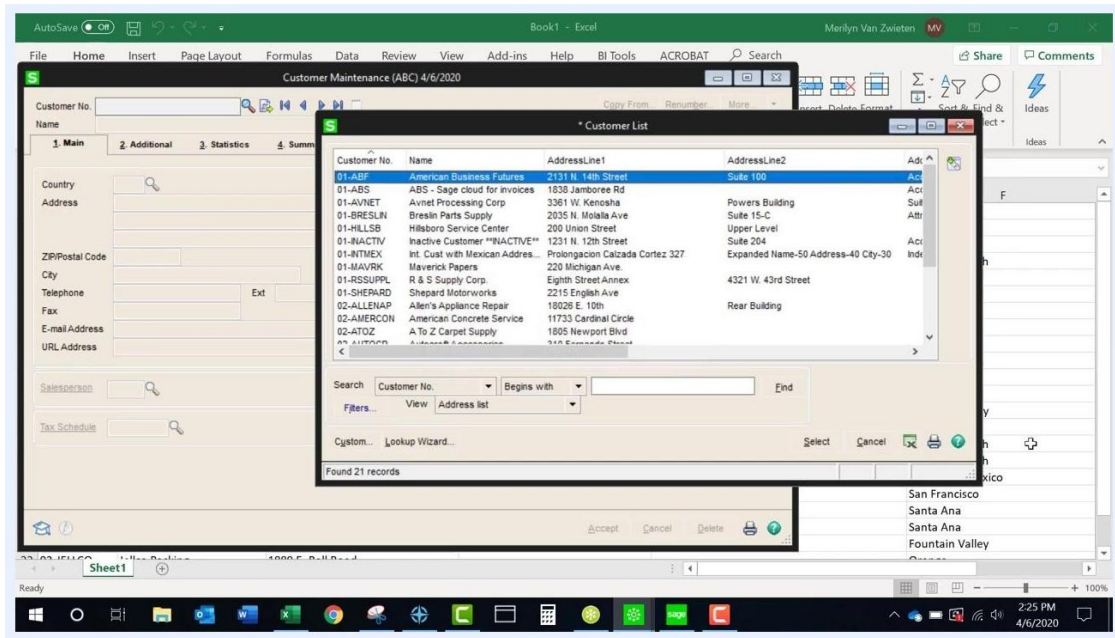
Prerequisites

- Access to Sage 100 (subscription version 2020 or similar).
- Microsoft Excel installed on your computer.
- Customer and transaction data already set up in Sage 100.

Exporting customer data from Customer Maintenance

1. Open Customer Maintenance

Launch Sage 100 and confirm you are on the main dashboard. The left **Favorites** panel displays options such as **Customer Maintenance**, **Customer View**, and **Accounts Receivable Aged Invoice Report**. Click **Customer Maintenance** in the Favorites panel to open it.



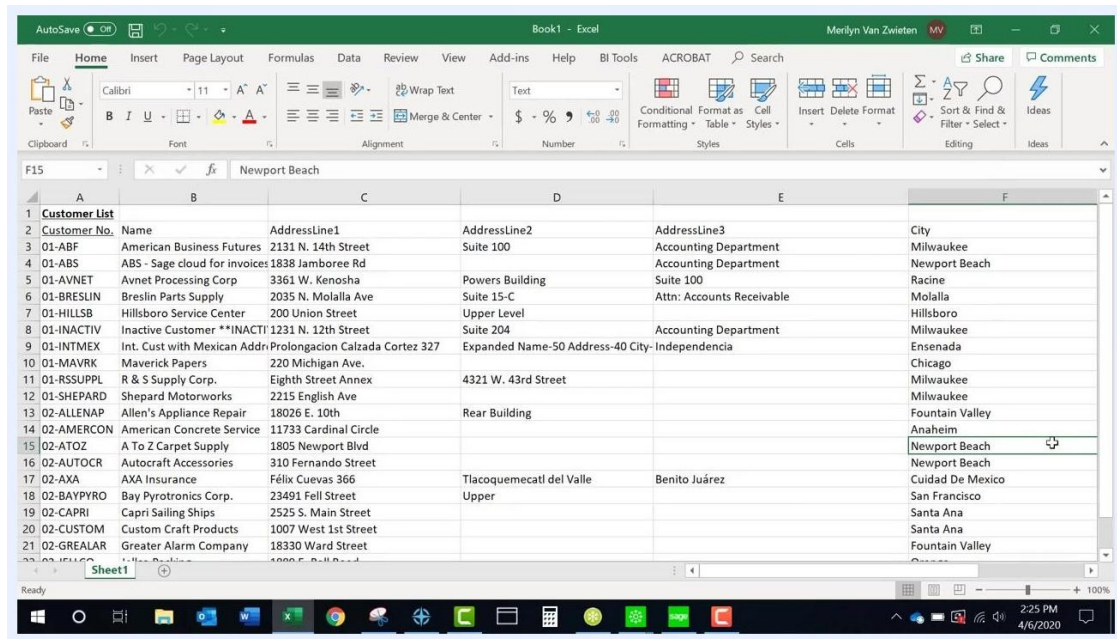
Sage 100 main dashboard with the Favorites panel and Customer Maintenance highlighted

2. Access the customer lookup list

Selecting **Customer Maintenance** opens a **Customer List** window. Use the **View** dropdown to choose the list type you want, such as Standard, Address list, or Stats. The list shows columns including Customer No., Name, Status, ZIP/Postal Code, and Phone Number. Locate the Excel export button, typically shown as an Excel icon, in the lookup list window.

3. Export the lookup list to Excel

Click the Excel export button to send the lookup list data to Microsoft Excel. The exported file opens automatically and includes columns such as Customer No., Name, AddressLine1, AddressLine2, AddressLine3, and City.

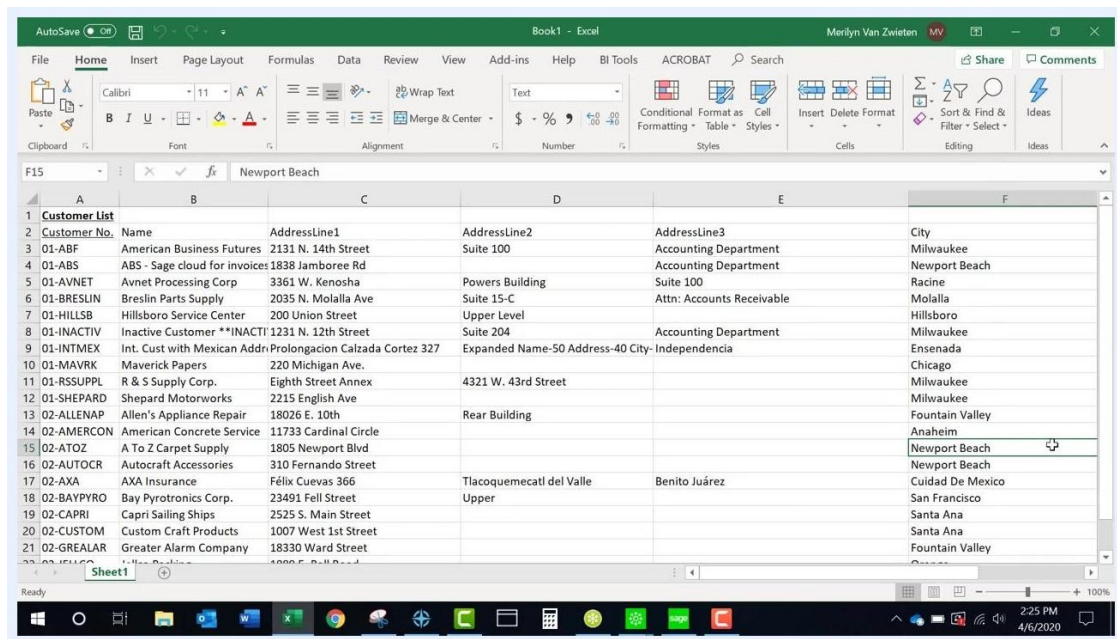


Customer No.	Name	AddressLine1	AddressLine2	AddressLine3	City
01-ABF	American Business Futures	2131 N. 14th Street	Suite 100	Accounting Department	Milwaukee
01-ABS	ABS - Sage cloud for invoices	1838 Jamboree Rd		Accounting Department	Newport Beach
01-AVNET	Avnet Processing Corp	3361 W. Kenosha	Powers Building	Suite 100	Racine
01-BRESLIN	Breslin Parts Supply	2035 N. Molalla Ave	Suite 15-C	Attn: Accounts Receivable	Molalla
01-HILLSB	Hillsboro Service Center	200 Union Street	Upper Level		Hillsboro
01-INACTIV	Inactive Customer **INACTI	1231 N. 12th Street	Suite 204	Accounting Department	Milwaukee
01-INTMEX	Int. Cust with Mexican Addr	Prolongacion Calzada Cortez 327	Expanded Name-50 Address-40 City-	Independencia	Ensenada
01-MAVRK	Maverick Papers	220 Michigan Ave.			Chicago
01-RSSUPPL	R & S Supply Corp.	Eighth Street Annex	4321 W. 43rd Street		Milwaukee
01-SHEPARD	Shepard Motorworks	2215 English Ave			Milwaukee
02-ALLENAP	Allen's Appliance Repair	18026 E. 10th	Rear Building		Fountain Valley
02-AMERCON	American Concrete Service	11733 Cardinal Circle			Anaheim
02-ATOZ	A To Z Carpet Supply	1805 Newport Blvd			Newport Beach
02-AUTOOCR	Autocraft Accessories	310 Fernando Street			Newport Beach
02-AXA	AXA Insurance	Félix Cuevas 366	Tlacoquemecatl del Valle	Benito Juárez	Cuidad De Mexico
02-BAYPYRO	Bay Pyrotechnics Corp.	23491 Fell Street	Upper		San Francisco
02-CAPRI	Capri Sailing Ships	2525 S. Main Street			Santa Ana
02-CUSTOM	Custom Craft Products	1007 West 1st Street			Santa Ana
02-GREALAR	Greater Alarm Company	18330 Ward Street			Fountain Valley

Customer List exported to Excel, showing customer details organized in columns

4. Export data from the Customer History tab

In the Customer Maintenance window, select a customer from the list and click the **History** tab. Right-click anywhere in the list or grid, then choose **Export to Excel** from the context menu. The exported data includes fields such as Period, Ending, Sales, Cost of Sales, Profit %, Profit Amt, Cash Received, and No. Invoices.



Customer Maintenance History tab with the right-click menu showing the Export to Excel option

5. Export data from the Invoices, Transactions, or Sales Orders tabs

Navigate to the **Invoices**, **Transactions**, or **S/Os** (Sales Orders) tab in Customer Maintenance. If the Excel export button is not active, click any line item in the list to enable it. Click the Excel export button to send the tab's data to Excel. The exported file is formatted according to the tab's columns, such as Invoice No., Invoice Type, Inv Date, Amount, Discount, Balance, Customer PO No., and Comments.

Period	Ending	Sales	Cost of Sales	Profit %	Profit Amt	Cash Received	No. Invoices
01	Jan 31	0.00	0.00	0.000	0.00	0.00	0
02	Feb 28	0.00	0.00	0.000	0.00	0.00	0
03	Mar 31	0.00	0.00	0.000	0.00	0.00	0
04	Apr 30	5342.50	0.00	100.000	5342.50	850.00	4
05	May 31	10178.35	2733.99	73.139	7444.36	8482.38	14
06	June 30	0.00	0.00	0.000	0.00	0.00	0
07	July 31	0.00	0.00	0.000	0.00	0.00	0
08	Aug 31	0.00	0.00	0.000	0.00	0.00	0
09	Sept 30	0.00	0.00	0.000	0.00	0.00	0
10	Oct 31	0.00	0.00	0.000	0.00	0.00	0
11	Nov 30	0.00	0.00	0.000	0.00	0.00	0
12	Dec 31	0.00	0.00	0.000	0.00	0.00	0
Total		15520.85	2733.99	82.385	12786.86	9332.38	18

Customer Maintenance Invoices tab with exported data visible in Excel

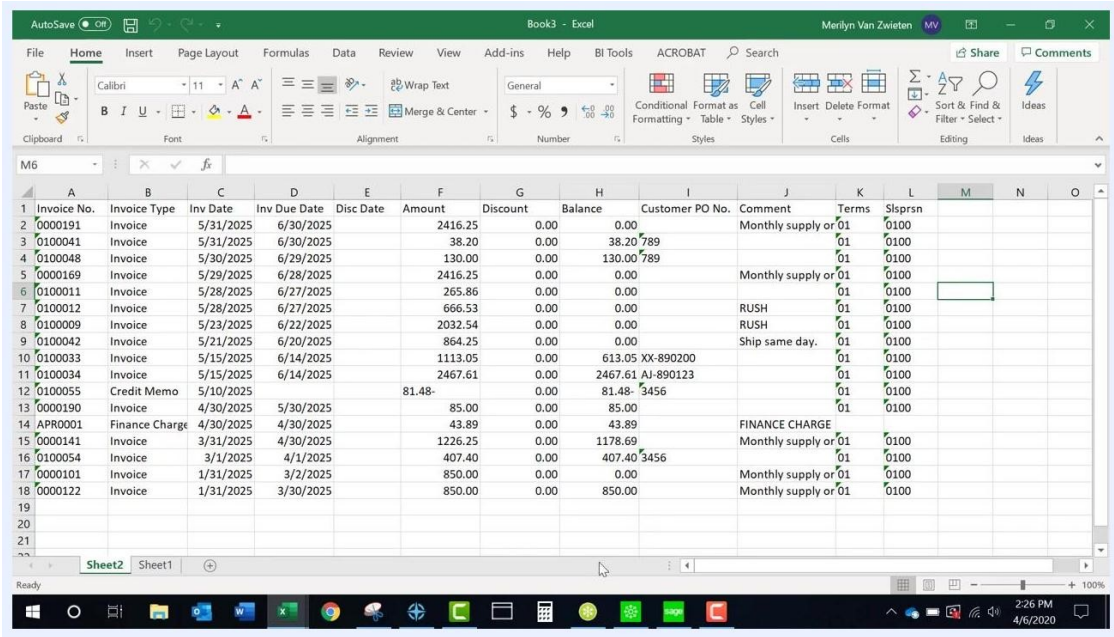
Note: The export to Excel feature works the same way across different list views and data tabs in Sage 100. If the export button is not enabled, select or highlight a line item first.

6. Review sales order lines

In Customer Maintenance, open the **S/Os** (Sales Orders) tab to review the sales orders for the selected customer. The list includes columns such as Number, Type, Order Date, Ship/Expire, Customer PO No., Ship To, Order Amount, and Last Inv/Order.

7. Export sales order line items

Right-click anywhere in the sales order list or grid, then select **Export to Excel** from the context menu. This creates a worksheet containing all line items of the sales order, including Item Code, Description, Ordered, Shipped, Back Ordered, Unit Price, Extension, and Comment.



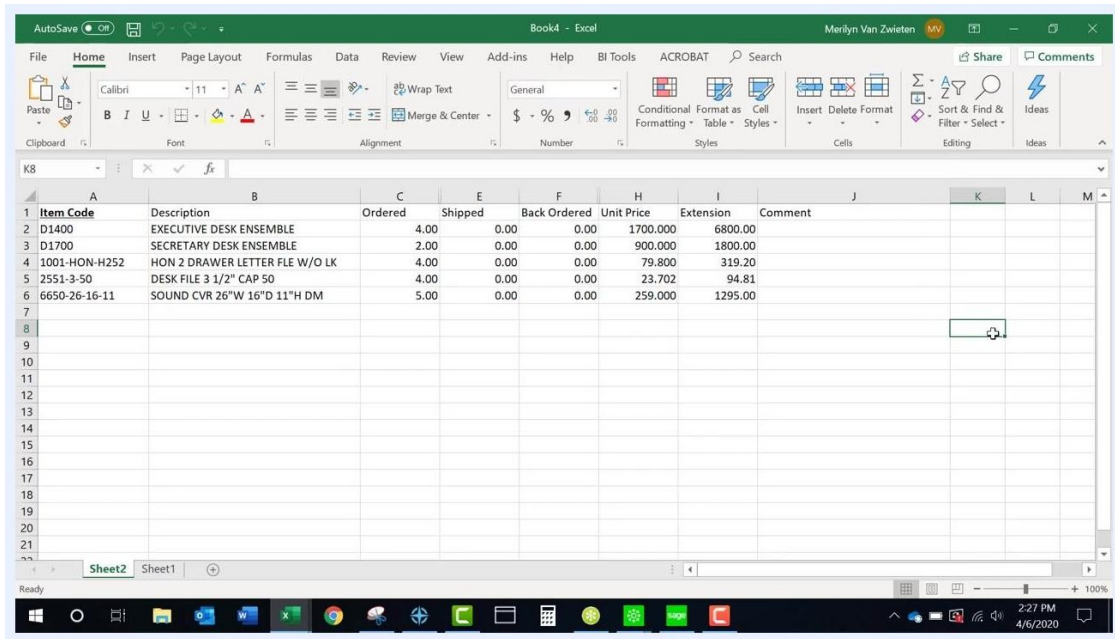
Invoice No.	Invoice Type	Inv Date	Inv Due Date	Disc Date	Amount	Discount	Balance	Customer PO No.	Comment	Terms	Slpsrtn
0000191	Invoice	5/31/2025	6/30/2025		2416.25	0.00	0.00		Monthly supply or	01	0100
0100041	Invoice	5/31/2025	6/30/2025		38.20	0.00	38.20	789		01	0100
0100048	Invoice	5/30/2025	6/29/2025		130.00	0.00	130.00	789		01	0100
0000169	Invoice	5/29/2025	6/28/2025		2416.25	0.00	0.00		Monthly supply or	01	0100
0100011	Invoice	5/28/2025	6/27/2025		265.86	0.00	0.00			01	0100
0100012	Invoice	5/28/2025	6/27/2025		666.53	0.00	0.00		RUSH	01	0100
0100009	Invoice	5/23/2025	6/22/2025		2032.54	0.00	0.00		RUSH	01	0100
0100042	Invoice	5/21/2025	6/20/2025		864.25	0.00	0.00		Ship same day.	01	0100
0100033	Invoice	5/15/2025	6/14/2025		1113.05	0.00	613.05	XX-890200		01	0100
0100034	Invoice	5/15/2025	6/14/2025		2467.61	0.00	2467.61	AJ-890123		01	0100
0100055	Credit Memo	5/10/2025			81.48	0.00	81.48	3456		01	0100
0000190	Invoice	4/30/2025	5/30/2025		85.00	0.00	85.00			01	0100
APR0001	Finance Charge	4/30/2025	4/30/2025		43.89	0.00	43.89		FINANCE CHARGE		
0000141	Invoice	3/31/2025	4/30/2025		1226.25	0.00	1178.69		Monthly supply or	01	0100
0100054	Invoice	3/1/2025	4/1/2025		407.40	0.00	407.40	3456		01	0100
0000101	Invoice	1/31/2025	3/2/2025		850.00	0.00	0.00		Monthly supply or	01	0100
0000122	Invoice	1/31/2025	3/30/2025		850.00	0.00	850.00		Monthly supply or	01	0100

Excel worksheet showing exported sales order line items with columns for Item Code, Description, Ordered, Shipped, Back Ordered, Unit Price, Extension, and Comment

Exporting data from the Business Insights Explorer

8. Open the Customer View Explorer

Return to the Sage 100 main dashboard. In the left **Favorites** panel, scroll to the bottom of each module's menu list to find the **Explorer** view, then click **Customer View** under the Explorer section.



The screenshot shows a Microsoft Excel spreadsheet with a table of order data. The table has columns for Item Code, Description, Ordered, Shipped, Back Ordered, Unit Price, Extension, and Comment. The data is as follows:

Item Code	Description	Ordered	Shipped	Back Ordered	Unit Price	Extension	Comment
D1400	EXECUTIVE DESK ENSEMBLE	4.00	0.00	0.00	1700.000	6800.00	
D1700	SECRETARY DESK ENSEMBLE	2.00	0.00	0.00	900.000	1800.00	
1001-HON-H252	HON 2 DRAWER LETTER FILE W/O LK	4.00	0.00	0.00	79.800	319.20	
2551-3-50	DESK FILE 3 1/2" CAP 50	4.00	0.00	0.00	23.702	94.81	
6650-26-16-11	SOUND CVR 26"W 16"D 11"H DM	5.00	0.00	0.00	259.000	1295.00	

Sage 100 main dashboard with Customer View highlighted in the Favorites panel

9. Review data in the Explorer view

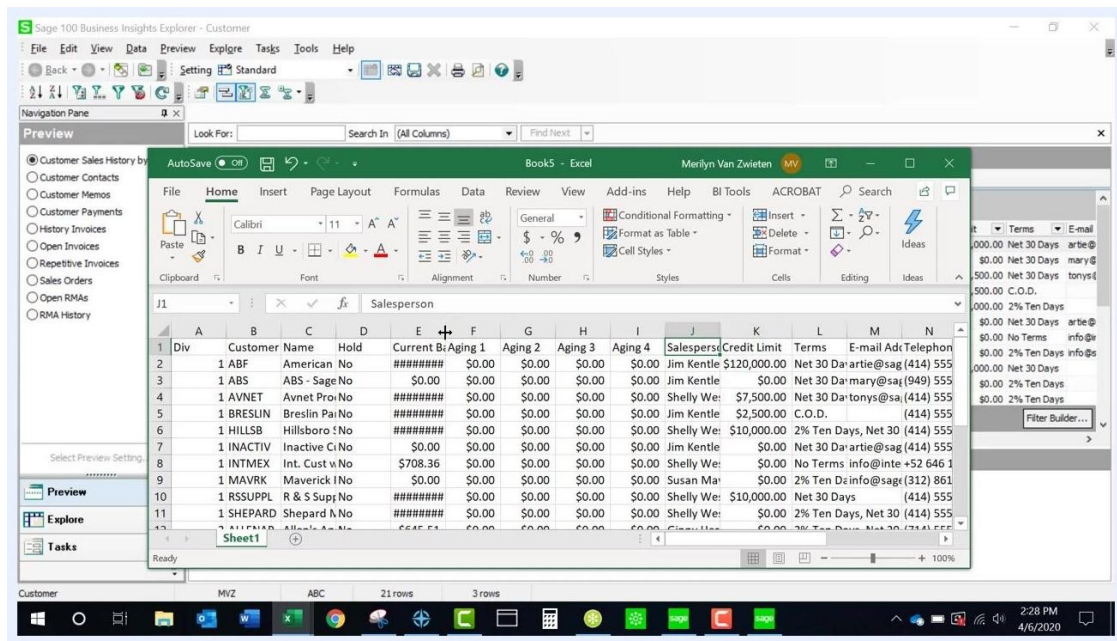
The Explorer view displays a data grid with customer information, including Div, Customer, Name, Hold, Current Balance, Aging 1-4, Salesperson, Credit Limit, Terms, and E-mail Address. Related panels, such as Customer Sales History by Period, show Fiscal Year, Dollars Sold, Cost of Goods Sold, Cash Received, Finance Charges, and Number of Invoices.

Item Code	Description	Ordered	Shipped	Back Ordered	Unit Price	Extension	Comment
D1400	EXECUTIVE DESK ENSEMBLE	4.00	0.00	0.00	1700.000	6800.00	
D1700	SECRETARY DESK ENSEMBLE	2.00	0.00	0.00	900.000	1800.00	
1001-HON-H252	HON 2 DRAWER LETTER FILE W/O LK	4.00	0.00	0.00	79.800	319.20	
2551-3-50	DESK FILE 3 1/2" CAP 50	4.00	0.00	0.00	23.702	94.81	
6650-26-16-11	SOUND CVR 26"W 16"D 11"H DM	5.00	0.00	0.00	259.000	1295.00	

Sage 100 Business Insights Explorer displaying the customer data grid and sales history by period

10. Export Explorer data to Excel

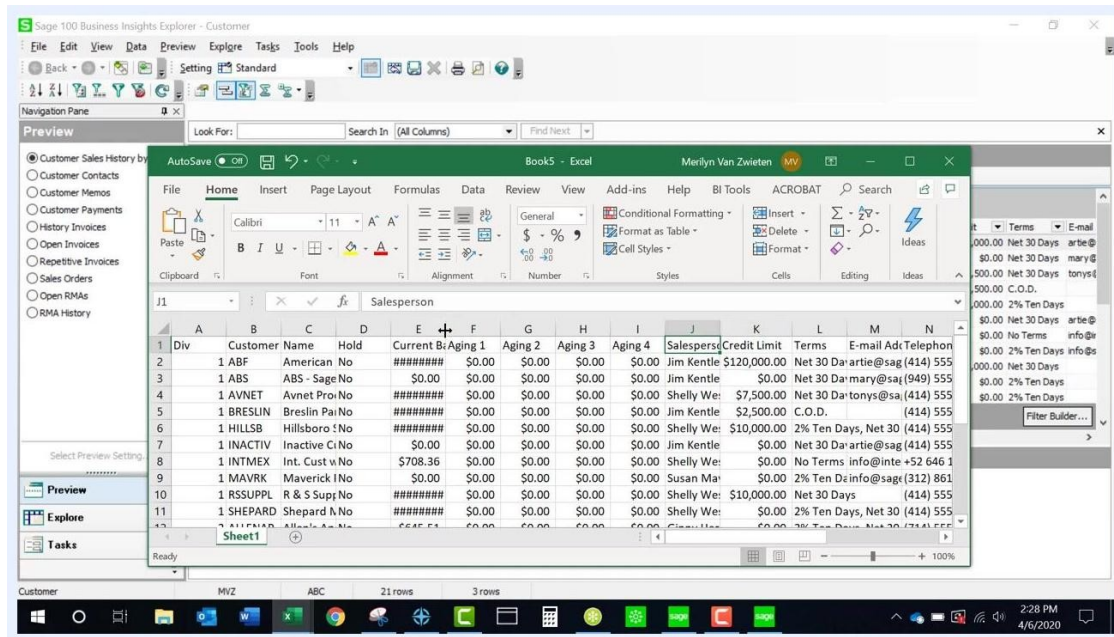
In the Explorer window, click **File** in the top menu, select **Export Options**, and choose **Excel** from the list of formats. The data grid is exported to an Excel worksheet.



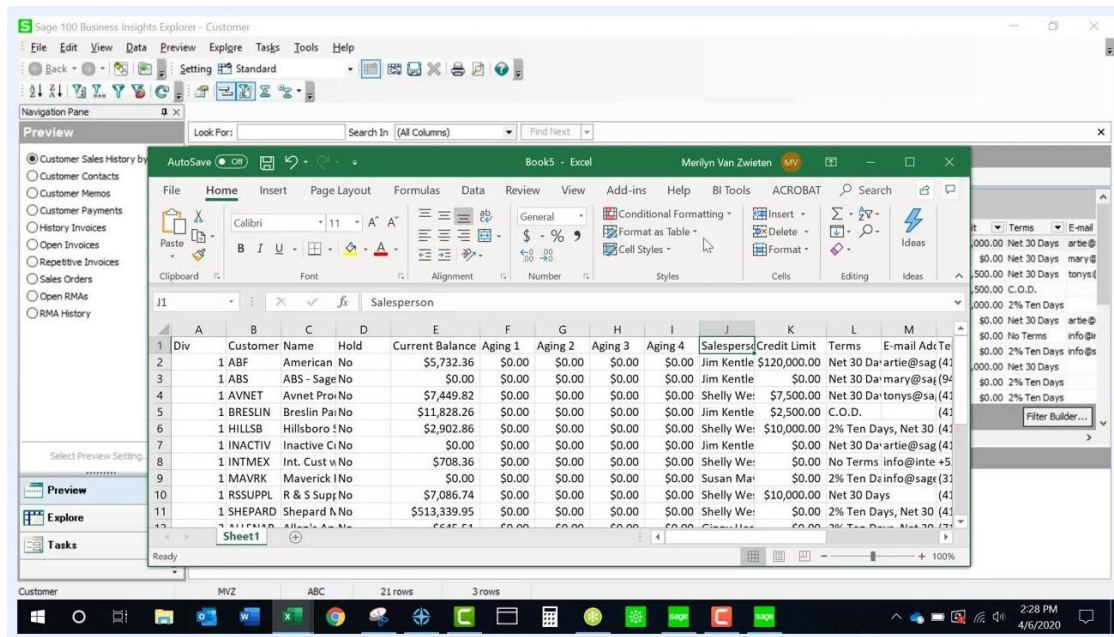
Sage 100 Business Insights Explorer with the File menu open, showing export options

11. Adjust exported Explorer data in Excel

Open the exported Excel file and review the data to confirm all columns are present. If a column shows "#####" (for example, in the Current Balance column), expand the column width in Excel to display the full value.



Exported Explorer data in Excel with columns that need width adjustment



Exported Explorer data in Excel after adjusting column widths for readability



Tip: When exporting from the Explorer view, you may need to manually widen columns in Excel for readability. The export process is similar across data grids in Sage 100—look for a right-click context menu or the **File > Export Options** menu.

12. Select secondary grid data

In the Business Insights Explorer, locate the **Preview** panel on the left and select **History Invoices** to display historical invoice data for customers.

The screenshot displays the Sage 100 Business Insights Explorer interface. The left sidebar shows the 'Preview' panel with 'History Invoices' selected. The main area is divided into two grids. The top grid, titled 'Customer', lists customer details including Name, Current Balance, Aging, Salesperson, and Terms. The bottom grid, titled 'Customer History Invoices', lists invoice details including Invoice #, App, Type, Inv Date, Salesperson, Terms, Tax Schedule, Customer PO, Comment, Order No., Order Date, and Bill To Name.

Div	Customer	Name	Hold	Current Balance	Aging 1	Aging 2	Aging 3	Aging 4	Salesperson	Credit Limit	Terms	E-mail
01	ABF	American Business Futures	No	\$5,732.36	\$0.00	\$0.00	\$0.00	\$0.00	Jim Kentley	\$120,000.00	Net 30 Days	arbie@
01	ABS	ABS - Sage cloud for invoice	No	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Jim Kentley	\$0.00	Net 30 Days	mary@
01	AVNET	Avnet Processing Corp	No	\$7,449.82	\$0.00	\$0.00	\$0.00	\$0.00	Shelly Westland	\$7,500.00	Net 30 Days	tonys@
01	BRESLIN	Breslin Parts Supply	No	\$11,828.26	\$0.00	\$0.00	\$0.00	\$0.00	Jim Kentley	\$2,500.00	C.O.D.	
01	HILLSB	Hillsboro Service Center	No	\$2,902.86	\$0.00	\$0.00	\$0.00	\$0.00	Shelly Westland	\$10,000.00	2% Ten Days	
01	INACTIV	Inactive Customer ***INACT	No	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Jim Kentley	\$0.00	Net 30 Days	arbie@
01	INTMEX	Int. Cust with Mexican Addr	No	\$708.36	\$0.00	\$0.00	\$0.00	\$0.00	Shelly Westland	\$0.00	No Terms	info@
01	MAVRK	Maverick Papers	No	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Susan Maye	\$0.00	2% Ten Days	info@
01	RSSUPPL	R & S Supply Corp.	No	\$7,086.74	\$0.00	\$0.00	\$0.00	\$0.00	Shelly Westland	\$10,000.00	Net 30 Days	
01	SHEPARD	Shepard Motorworks	No	\$513,339.95	\$0.00	\$0.00	\$0.00	\$0.00	Shelly Westland	\$0.00	2% Ten Days	
02	ALLENAP	Allen's Appliance Repair	No	\$645.51	\$0.00	\$0.00	\$0.00	\$0.00	Ginny Hernandez	\$0.00	2% Ten Days	

Invoice	App	Type	Inv Date	Salesperson	Terms	Tax Schedule	Customer PO	Comment	Order No.	Order Date	Bill To Name	SI
0100039	S/O	Credit Memo	5/16/2025	Jim Kentley	Net 30 Days	WI MLML					American Business	Ai
0100042	A/R	Invoice	5/21/2025	Jim Kentley	Net 30 Days	WI MLML		Ship same day.			American Business	Ai
0200086	A/R	Credit Memo	5/31/2025	Jim Kentley	Net 30 Days	WI MLML		RETURN OF DEF			American Business	Ai
0100054	S/O	Invoice	3/1/2025	Jim Kentley	Net 30 Days	WI	3456		0000170	3/1/2025	American Business	Ai
0100055	S/O	Credit Memo	5/10/2025	Jim Kentley	Net 30 Days	WI	3456		0000170	5/10/2025	American Business	Ai

Business Insights Explorer with History Invoices selected in the Preview panel, showing customer data in the primary grid and invoice history in the secondary grid

13. Move secondary grid data to the primary grid

Double-click the desired customer in the main customer data grid. The secondary grid, History Invoices, is promoted to the primary grid and becomes available for export.

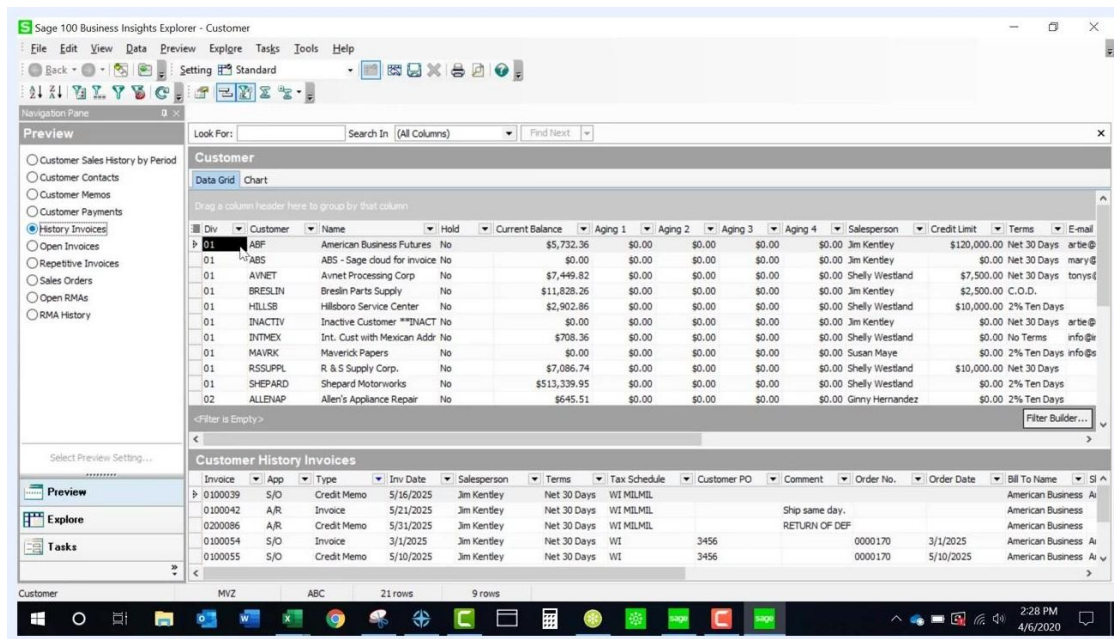
The screenshot shows the Sage 100 Business Insights Explorer interface. The 'Customer' grid is the primary grid, and the 'History Invoices' grid is promoted to the primary grid. The 'History Invoices' grid is displayed below the 'Customer' grid. The 'History Invoices' grid has columns: Invoice, App, Type, Inv Date, Salesperson, Terms, Tax Schedule, Customer PO, Comment, Order No., Order Date, Bill To Name, and SI. The 'History Invoices' grid shows 9 rows of data.

Invoice	App	Type	Inv Date	Salesperson	Terms	Tax Schedule	Customer PO	Comment	Order No.	Order Date	Bill To Name	SI
0100039	S/O	Credit Memo	5/16/2025	Jim Kentley	Net 30 Days	WI MLML					American Business	AI
0100042	A/R	Invoice	5/21/2025	Jim Kentley	Net 30 Days	WI MLML		Ship same day.			American Business	AI
0200086	A/R	Credit Memo	5/31/2025	Jim Kentley	Net 30 Days	WI MLML		RETURN OF DEF			American Business	AI
0100054	S/O	Invoice	3/1/2025	Jim Kentley	Net 30 Days	WI	3456		0000170	3/1/2025	American Business	AI
0100055	S/O	Credit Memo	5/10/2025	Jim Kentley	Net 30 Days	WI	3456		0000170	5/10/2025	American Business	AI

Business Insights Explorer showing History Invoices promoted to the primary grid, ready for export

14. Export the promoted data to Excel

With the History Invoices data now in the primary grid, click **File** in the top menu, select **Export Options**, and choose **Microsoft Excel** from the list of formats. You can choose to export all records or only the selected ones.



Export Options menu open in Business Insights Explorer, with Microsoft Excel selected as the export format

Exporting the Accounts Receivable Aged Invoice Report

15. Configure the report settings

From the Sage 100 main dashboard, select **Accounts Receivable Aged Invoice Report** from the Favorites panel. In the report setup window, configure the following options:

- **Report Setting:** SWK
- **Description:** Accounts Receivable Aged Invoice Report
- **Aging Date:** 4/6/2020
- **Report Detail Option:** Invoice
- **Aging Option to Print:** All Open Invoices
- **Future Transactions:** Include All
- **Include Paid Invoices:** Checked
- **Age Credit Memos:** Checked

- **Print Transaction Date:** Checked
- **Print Condensed:** Checked

Add any additional filters you need, such as Customer Number, Customer Name, or Salesperson.

The screenshot shows the Sage 100 Business Insights Explorer - Customer window. The main area displays a table of customer data with columns: Div, Customer, Name, Hold, Current Balance, Aging 1, Aging 2, Aging 3, Aging 4, Salesperson, Credit Limit, Terms, and E-mail. Below this is a section for Customer History Invoices with columns: Invoice, App, Type, Inv Date, Salesperson, Terms, Tax Schedule, Customer PO, Comment, Order No., Order Date, Bill To Name, and SI. The window also includes a Navigation Pane on the left with options like Customer Sales History by Period, Customer Contacts, Customer Memos, Customer Payments, History Invoices, Open Invoices, Repetitive Invoices, Sales Orders, Open RMAs, and RMA History. A Filter Builder button is visible at the bottom right of the main data area.

Accounts Receivable Aged Invoice Report setup window showing all relevant options and filters

16. Preview and export the report

Click **Preview** to generate the report. In the preview window, click the export icon or select **File > Export**. In the Export dialog, choose **Microsoft Excel (97-2003) Data-Only** as the format, then click **OK** to export.

Invoice	Due Date	Discount	Amount	Balance	Current	30 Days	60 Days	90 Days	Days Delq
0000122-IN	1/0/00	0.00	850.00	850.00	0.00	0.00	0.00	0.00	0
0100054-IN	4/1/25	1/0/00	0.00	407.40	407.40	0.00	0.00	0.00	0
0000141-IN	1/0/00	0.00	1,178.69	1,178.69	0.00	0.00	0.00	0.00	0
0000190-IN	1/0/00	0.00	85.00	85.00	0.00	0.00	0.00	0.00	0
APR0001-FC	1/0/00	0.00	43.89	43.89	0.00	0.00	0.00	0.00	0
0100055-CM	1/0/00	0.00	81.48	81.48	0.00	0.00	0.00	0.00	0
0100033-IN	1/0/00	0.00	613.05	613.05	0.00	0.00	0.00	0.00	0
0100034-IN	1/0/00	0.00	2,467.61	2,467.61	0.00	0.00	0.00	0.00	0
0100048-IN	1/0/00	0.00	130.00	130.00	0.00	0.00	0.00	0.00	0
0100041-IN	1/0/00	0.00	38.20	38.20	0.00	0.00	0.00	0.00	0
Customer ABF Totals:			0.00	5,732.36	5,732.36	0.00	0.00	0.00	0.00
AVNET Avnet Processing Corp									
Contact: Tony Schultz									
0000142-IN	1/0/00	0.00	1,751.00	1,751.00	0.00	0.00	0.00	0.00	0
APR0002-FC	1/0/00	0.00	44.12	44.12	0.00	0.00	0.00	0.00	0
0100043-IN	1/0/00	0.00	935.25	935.25	0.00	0.00	0.00	0.00	0
0100060-IN	1/0/00	0.00	72.45	72.45	0.00	0.00	0.00	0.00	0
0000170-IN	1/0/00	0.00	4,041.00	4,041.00	0.00	0.00	0.00	0.00	0
0000192-IN	1/0/00	0.00	606.00	606.00	0.00	0.00	0.00	0.00	0

Export dialog in the Sage 100 report preview window with Microsoft Excel (97-2003) Data-Only selected

17. Adjust the exported report in Excel

Open the exported Excel file and review the data for completeness. If you see "#####" in any column, expand the column width to reveal the full data, and adjust row heights as needed for readability.

Invoice	Due Date	Discount	Discount Am	Balance	Current	30 Days	60 Days	90 Days	Days Delq
0000122-IN	1/0/00	0.00	850.00	850.00	0.00	0.00	0.00	0.00	0
0100054-IN	4/1/25	0.00	407.40	407.40	0.00	0.00	0.00	0.00	0
0000141-IN	1/0/00	0.00	1,178.69	1,178.69	0.00	0.00	0.00	0.00	0
0000190-IN	1/0/00	0.00	85.00	85.00	0.00	0.00	0.00	0.00	0
APR0001-FC	1/0/00	0.00	43.89	43.89	0.00	0.00	0.00	0.00	0
0100055-CM	1/0/00	0.00	81.48	81.48	0.00	0.00	0.00	0.00	0
0100033-IN	1/0/00	0.00	613.05	613.05	0.00	0.00	0.00	0.00	0
0100034-IN	1/0/00	0.00	2,467.61	2,467.61	0.00	0.00	0.00	0.00	0
0100048-IN	1/0/00	0.00	130.00	130.00	0.00	0.00	0.00	0.00	0
0100041-IN	1/0/00	0.00	38.20	38.20	0.00	0.00	0.00	0.00	0
Customer ABF Totals:			0.00	5,732.36	5,732.36	0.00	0.00	0.00	0.00
AVNET Avnet Processing Corp									
Contact: Tony Schultz									
0000142-IN	1/0/00	0.00	1,751.00	1,751.00	0.00	0.00	0.00	0.00	0
APR0002-FC	1/0/00	0.00	44.12	44.12	0.00	0.00	0.00	0.00	0
0100043-IN	1/0/00	0.00	935.25	935.25	0.00	0.00	0.00	0.00	0
0100060-IN	1/0/00	0.00	72.45	72.45	0.00	0.00	0.00	0.00	0
0000170-IN	1/0/00	0.00	4,041.00	4,041.00	0.00	0.00	0.00	0.00	0
0000192-IN	1/0/00	0.00	606.00	606.00	0.00	0.00	0.00	0.00	0

Exported Accounts Receivable Aged Invoice Report in Excel with columns that need width adjustment

Invoice	Due Date	Discount	Discount Am	Balance	Current	30 Days	60 Days	90 Days	Days Delq
0000122-IN	1/0/00	0.00	850.00	850.00	0.00	0.00	0.00	0.00	0
0100054-IN	4/1/25	0.00	407.40	407.40	0.00	0.00	0.00	0.00	0
0000141-IN	1/0/00	0.00	1,178.69	1,178.69	0.00	0.00	0.00	0.00	0
0000190-IN	1/0/00	0.00	85.00	85.00	0.00	0.00	0.00	0.00	0
APR0001-FC	1/0/00	0.00	43.89	43.89	0.00	0.00	0.00	0.00	0
0100055-CM	1/0/00	0.00	81.48	81.48	0.00	0.00	0.00	0.00	0
0100033-IN	1/0/00	0.00	613.05	613.05	0.00	0.00	0.00	0.00	0
0100034-IN	1/0/00	0.00	2,467.61	2,467.61	0.00	0.00	0.00	0.00	0
0100048-IN	1/0/00	0.00	130.00	130.00	0.00	0.00	0.00	0.00	0
0100041-IN	1/0/00	0.00	38.20	38.20	0.00	0.00	0.00	0.00	0
Customer ABF Totals:			0.00	5,732.36	5,732.36	0.00	0.00	0.00	0.00
AVNET Avnet Processing Corp									
Contact: Tony Schultz									
0000142-IN	1/0/00	0.00	1,751.00	1,751.00	0.00	0.00	0.00	0.00	0
APR0002-FC	1/0/00	0.00	44.12	44.12	0.00	0.00	0.00	0.00	0
0100043-IN	1/0/00	0.00	935.25	935.25	0.00	0.00	0.00	0.00	0
0100060-IN	1/0/00	0.00	72.45	72.45	0.00	0.00	0.00	0.00	0
0000170-IN	1/0/00	0.00	4,041.00	4,041.00	0.00	0.00	0.00	0.00	0
0000192-IN	1/0/00	0.00	606.00	606.00	0.00	0.00	0.00	0.00	0

Exported Accounts Receivable Aged Invoice Report in Excel after adjusting column widths and row heights

18. Review special columns and headers

Some columns may not have headers—for example, a retention column if retentions are not used. Confirm that all relevant data is present and that column headers align correctly with the data below them.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
			InvoiceDate	DueDate	Discount	DiscountAm	Balance	Current	30 Days	60 Days	90 Days		DaysDelq					
2	Division Number: 01 EAST SALES OFFICE																	
3	Customer INV																	
4	ABF American Business Futures																	
5	Contact: Artie Johnson																	
6		0000122-IN	1/31/25	3/30/25	1/0/00	0.00	850.00	850.00	0.00	0.00	0.00	0.00	0					
7		0100054-IN	3/1/25	4/1/25	1/0/00	0.00	407.40	407.40	0.00	0.00	0.00	0.00	0					
8		0000141-IN	3/31/25	4/30/25	1/0/00	0.00	1,178.69	1,178.69	0.00	0.00	0.00	0.00	0					
9		0000190-IN	4/30/25	5/30/25	1/0/00	0.00	85.00	85.00	0.00	0.00	0.00	0.00	0					
10		APR0001-FC	4/30/25	4/30/25	1/0/00	0.00	43.89	43.89	0.00	0.00	0.00	0.00	0					
11		0100055-CM	5/10/25			0.00	81.48	81.48	0.00	0.00	0.00	0.00	0					
12		0100033-IN	5/15/25	6/14/25	1/0/00	0.00	613.05	613.05	0.00	0.00	0.00	0.00	0					
13		0100034-IN	5/15/25	6/14/25	1/0/00	0.00	2,467.61	2,467.61	0.00	0.00	0.00	0.00	0					
14		0100048-IN	5/30/25	6/29/25	1/0/00	0.00	130.00	130.00	0.00	0.00	0.00	0.00	0					
15		0100041-IN	5/31/25	6/30/25	1/0/00	0.00	38.20	38.20	0.00	0.00	0.00	0.00	0					
16																		
17	Customer ABF Totals:																	
18						0.00	5,732.36	5,732.36	0.00	0.00	0.00	0.00						
19	AVNET Avnet Processing Corp																	
20	Contact: Tony Schultz																	
21		0000142-IN	3/31/25	4/30/25	1/0/00	0.00	1,751.00	1,751.00	0.00	0.00	0.00	0.00	0					
22		APR0002-FC	4/30/25	4/30/25	1/0/00	0.00	44.12	44.12	0.00	0.00	0.00	0.00	0					
23		0100043-IN	5/21/25	6/20/25	1/0/00	0.00	935.25	935.25	0.00	0.00	0.00	0.00	0					
24		0100060-IN	5/21/25	6/20/25	1/0/00	0.00	72.45	72.45	0.00	0.00	0.00	0.00	0					
25		0000170-IN	5/29/25	6/28/25	1/0/00	0.00	4,041.00	4,041.00	0.00	0.00	0.00	0.00	0					
26		0000192-IN	5/31/25	6/30/25	1/0/00	0.00	606.00	606.00	0.00	0.00	0.00	0.00	0					

Final exported Accounts Receivable Aged Invoice Report in Excel with all columns and headers clearly visible



Tips: Use the **Maintain Relative Object Position** option, if available, to keep column headers aligned with their data. You may need to make minor adjustments in Excel, such as expanding columns or modifying row heights, to ensure all data is visible. Some report layouts may require changes in Crystal Reports, such as separating combined headers, for optimal export results.

Adjusting Crystal Reports column headers

19. Review the exported report for combined headers

Open the exported Accounts Receivable Aged Invoice Report in Excel and examine the column headers in row 3. Confirm that headers such as "Customer" and "INV" (Invoice) appear as separate columns, and that each data column—InvoiceDate, DueDate, Discount, Balance, Current, 30 Days, 60 Days, 90 Days, DaysDelq—has its own header. Check that data rows align under the correct headers and that customer and contact information, along with totals and subtotals, are clearly labeled.

Customer	INV	InvoiceDate	DueDate	Discount	DiscountAm	Balance	Current	30 Days	60 Days	90 Days	DaysDelq
Division Number: 01 EAST SALES OFFICE											
Customer: INV											
ABF American Business Futures											
Contact: Arlie Johnson											
0000122-IN		1/31/25	3/30/25	1/0/00	0.00	850.00	850.00	0.00	0.00	0.00	0
0100054-IN		3/1/25	4/1/25	1/0/00	0.00	407.40	407.40	0.00	0.00	0.00	0
0000141-IN		3/31/25	4/30/25	1/0/00	0.00	1,178.69	1,178.69	0.00	0.00	0.00	0
0000190-IN		4/30/25	5/30/25	1/0/00	0.00	85.00	85.00	0.00	0.00	0.00	0
APR0001-FC		4/30/25	4/30/25	1/0/00	0.00	43.89	43.89	0.00	0.00	0.00	0
0100055-CM		5/10/25			0.00	81.48	81.48	0.00	0.00	0.00	0
0100033-IN		5/15/25	6/14/25	1/0/00	0.00	613.05	613.05	0.00	0.00	0.00	0
0100034-IN		5/15/25	6/14/25	1/0/00	0.00	2,467.61	2,467.61	0.00	0.00	0.00	0
0100048-IN		5/30/25	6/29/25	1/0/00	0.00	130.00	130.00	0.00	0.00	0.00	0
0100041-IN		5/31/25	6/30/25	1/0/00	0.00	38.20	38.20	0.00	0.00	0.00	0
Customer ABF Totals:						0.00	5,732.36	5,732.36	0.00	0.00	0.00
AVNET Avnet Processing Corp											
Contact: Tony Schultz											
0000142-IN		3/31/25	4/30/25	1/0/00	0.00	1,751.00	1,751.00	0.00	0.00	0.00	0
APR0002-FC		4/30/25	4/30/25	1/0/00	0.00	44.12	44.12	0.00	0.00	0.00	0
0100043-IN		5/21/25	6/20/25	1/0/00	0.00	935.25	935.25	0.00	0.00	0.00	0
0100060-IN		5/21/25	6/20/25	1/0/00	0.00	72.45	72.45	0.00	0.00	0.00	0
0000170-IN		5/29/25	6/28/25	1/0/00	0.00	4,041.00	4,041.00	0.00	0.00	0.00	0
0000192-IN		5/31/25	6/30/25	1/0/00	0.00	606.00	606.00	0.00	0.00	0.00	0

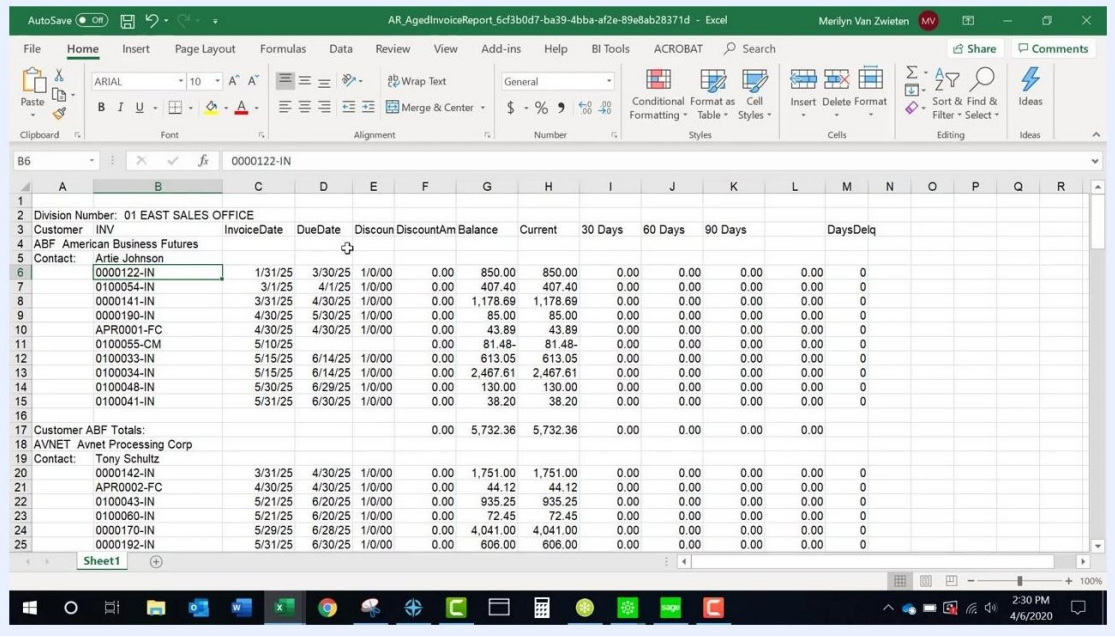
Excel spreadsheet showing the exported report with separated Customer and Invoice headers and clearly labeled data columns

20. Modify combined headers in Crystal Reports

If your exported report still shows combined headers, such as "Customer/Invoice," open the report layout in Crystal Reports. Locate the column header section and separate the combined header into individual fields—for example, one header for "Customer" and another for "INV." Make sure each data field has a corresponding, clearly labeled header, then save your changes and re-export the report to Excel to verify the improvement.

21. Add additional fields if needed

If you need additional fields, such as a phone number, insert a new header and corresponding data column. For example, add "Telephone Number" as a header and enter the relevant data for each customer, such as "973.758.6100."



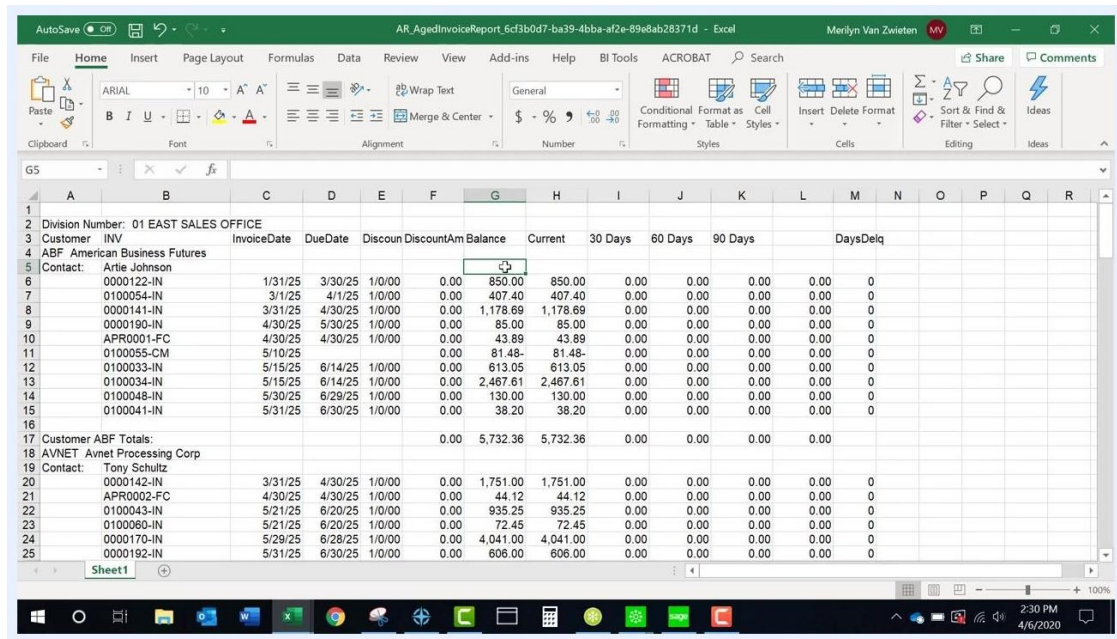
	InvoiceDate	DueDate	Discoun	DiscountAm	Balance	Current	30 Days	60 Days	90 Days	DaysDelq
Division Number: 01 EAST SALES OFFICE										
Customer INV										
ABF American Business Futures										
Contact: Artie Johnson										
0000122-IN	1/31/25	3/30/25	1/0/00	0.00	850.00	850.00	0.00	0.00	0.00	0
0100054-IN	3/1/25	4/1/25	1/0/00	0.00	407.40	407.40	0.00	0.00	0.00	0
0000141-IN	3/31/25	4/30/25	1/0/00	0.00	1,178.69	1,178.69	0.00	0.00	0.00	0
0000190-IN	4/30/25	5/30/25	1/0/00	0.00	85.00	85.00	0.00	0.00	0.00	0
APR0001-FC	4/30/25	4/30/25	1/0/00	0.00	43.89	43.89	0.00	0.00	0.00	0
0100055-CM	5/10/25			0.00	81.48	81.48	0.00	0.00	0.00	0
0100033-IN	5/15/25	6/14/25	1/0/00	0.00	613.05	613.05	0.00	0.00	0.00	0
0100034-IN	5/15/25	6/14/25	1/0/00	0.00	2,467.61	2,467.61	0.00	0.00	0.00	0
0100048-IN	5/30/25	6/29/25	1/0/00	0.00	130.00	130.00	0.00	0.00	0.00	0
0100041-IN	5/31/25	6/30/25	1/0/00	0.00	38.20	38.20	0.00	0.00	0.00	0
Customer ABF Totals:					0.00	5,732.36	5,732.36	0.00	0.00	0.00
AVNET Avnet Processing Corp										
Contact: Tony Schultz										
0000142-IN	3/31/25	4/30/25	1/0/00	0.00	1,751.00	1,751.00	0.00	0.00	0.00	0
APR0002-FC	4/30/25	4/30/25	1/0/00	0.00	44.12	44.12	0.00	0.00	0.00	0
0100043-IN	5/21/25	6/20/25	1/0/00	0.00	935.25	935.25	0.00	0.00	0.00	0
0100060-IN	5/21/25	6/20/25	1/0/00	0.00	72.45	72.45	0.00	0.00	0.00	0
0000170-IN	5/29/25	6/28/25	1/0/00	0.00	4,041.00	4,041.00	0.00	0.00	0.00	0
0000192-IN	5/31/25	6/30/25	1/0/00	0.00	606.00	606.00	0.00	0.00	0.00	0

Excel spreadsheet showing the header row and invoice data, ready for additional fields

22. Remove unnecessary fields for proper alignment

Delete any columns or headers that are not needed for your report.

Removing extra fields helps ensure that all remaining columns line up correctly and are easy to read.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1																		
2	Division Number: 01 EAST SALES OFFICE																	
3	Customer: INV																	
4	ABF American Business Futures																	
5	Contact: Artie Johnson																	
6		0000122-IN	1/31/25	3/30/25	1/0/00	0.00	850.00	850.00	0.00	0.00	0.00	0.00	0.00	0				
7		0100054-IN	3/1/25	4/1/25	1/0/00	0.00	407.40	407.40	0.00	0.00	0.00	0.00	0.00	0				
8		0000141-IN	3/31/25	4/30/25	1/0/00	0.00	1,178.69	1,178.69	0.00	0.00	0.00	0.00	0.00	0				
9		0000190-IN	4/30/25	5/30/25	1/0/00	0.00	85.00	85.00	0.00	0.00	0.00	0.00	0.00	0				
10		APR0001-FC	4/30/25	4/30/25	1/0/00	0.00	43.89	43.89	0.00	0.00	0.00	0.00	0.00	0				
11		0100055-CM	5/10/25			0.00	81.48	81.48	0.00	0.00	0.00	0.00	0.00	0				
12		0100033-IN	5/15/25	6/14/25	1/0/00	0.00	613.05	613.05	0.00	0.00	0.00	0.00	0.00	0				
13		0100034-IN	5/15/25	6/14/25	1/0/00	0.00	2,467.61	2,467.61	0.00	0.00	0.00	0.00	0.00	0				
14		0100048-IN	5/30/25	6/29/25	1/0/00	0.00	130.00	130.00	0.00	0.00	0.00	0.00	0.00	0				
15		0100041-IN	5/31/25	6/30/25	1/0/00	0.00	38.20	38.20	0.00	0.00	0.00	0.00	0.00	0				
16																		
17	Customer ABF Totals:																	
18						0.00	5,732.36	5,732.36	0.00	0.00	0.00	0.00						
19	AVNET Avnet Processing Corp																	
20	Contact: Tony Schultz																	
21		0000142-IN	3/31/25	4/30/25	1/0/00	0.00	1,751.00	1,751.00	0.00	0.00	0.00	0.00	0.00	0				
22		APR0002-FC	4/30/25	4/30/25	1/0/00	0.00	44.12	44.12	0.00	0.00	0.00	0.00	0.00	0				
23		0100043-IN	5/21/25	6/20/25	1/0/00	0.00	935.25	935.25	0.00	0.00	0.00	0.00	0.00	0				
24		0100060-IN	5/21/25	6/20/25	1/0/00	0.00	72.45	72.45	0.00	0.00	0.00	0.00	0.00	0				
25		0000170-IN	5/29/25	6/28/25	1/0/00	0.00	4,041.00	4,041.00	0.00	0.00	0.00	0.00	0.00	0				
26		0000192-IN	5/31/25	6/30/25	1/0/00	0.00	606.00	606.00	0.00	0.00	0.00	0.00	0.00	0				

Excel spreadsheet with headers and data aligned after removing unnecessary fields

23. Reposition important fields under their headers

If a specific field, such as the phone number, is important, move it so it appears directly under its header and adjacent to related customer information. Confirm that all headers sit directly above their corresponding data.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
2	Division Number: 01 EAST SALES OFFICE																	
3	Customer	INV	InvoiceDate	DueDate	Discoun	DiscountAm	Balance	Current	30 Days	60 Days	90 Days							
4	ABF American Business Futures																	
5	Contact:	Artie Johnson																
6	0000122-IN		1/31/25	3/30/25	1/0/00	0.00	850.00	850.00	0.00	0.00	0.00	0.00	0.00	0.00	0			
7	0100054-IN		3/1/25	4/1/25	1/0/00	0.00	407.40	407.40	0.00	0.00	0.00	0.00	0.00	0.00	0			
8	0000141-IN		3/31/25	4/30/25	1/0/00	0.00	1,178.89	1,178.89	0.00	0.00	0.00	0.00	0.00	0.00	0			
9	0000190-IN		4/30/25	5/30/25	1/0/00	0.00	85.00	85.00	0.00	0.00	0.00	0.00	0.00	0.00	0			
10	APR0001-FC		4/30/25	4/30/25	1/0/00	0.00	43.89	43.89	0.00	0.00	0.00	0.00	0.00	0.00	0			
11	0100055-CM		5/10/25			0.00	81.48	81.48	0.00	0.00	0.00	0.00	0.00	0.00	0			
12	0100033-IN		5/15/25	6/14/25	1/0/00	0.00	613.05	613.05	0.00	0.00	0.00	0.00	0.00	0.00	0			
13	0100034-IN		5/15/25	6/14/25	1/0/00	0.00	2,467.61	2,467.61	0.00	0.00	0.00	0.00	0.00	0.00	0			
14	0100048-IN		5/30/25	6/29/25	1/0/00	0.00	130.00	130.00	0.00	0.00	0.00	0.00	0.00	0.00	0			
15	0100041-IN		5/31/25	6/30/25	1/0/00	0.00	38.20	38.20	0.00	0.00	0.00	0.00	0.00	0.00	0			
16																		
17	Customer ABF Totals:						0.00	5,732.36	5,732.36	0.00	0.00	0.00	0.00					
18	AVNET Avnet Processing Corp																	
19	Contact:	Tony Schultz																
20	0000142-IN		3/31/25	4/30/25	1/0/00	0.00	1,751.00	1,751.00	0.00	0.00	0.00	0.00	0.00	0.00	0			
21	APR0002-FC		4/30/25	4/30/25	1/0/00	0.00	44.12	44.12	0.00	0.00	0.00	0.00	0.00	0.00	0			
22	0100043-IN		5/21/25	6/20/25	1/0/00	0.00	935.25	935.25	0.00	0.00	0.00	0.00	0.00	0.00	0			
23	0100060-IN		5/21/25	6/20/25	1/0/00	0.00	72.45	72.45	0.00	0.00	0.00	0.00	0.00	0.00	0			
24	0000170-IN		5/29/25	6/28/25	1/0/00	0.00	4,041.00	4,041.00	0.00	0.00	0.00	0.00	0.00	0.00	0			
25	0000192-IN		5/31/25	6/30/25	1/0/00	0.00	606.00	606.00	0.00	0.00	0.00	0.00	0.00	0.00	0			

Excel spreadsheet showing the Balance header and data properly aligned

Getting help

If you need further assistance exporting data in Sage 100, you can reach support through the following channels:

- **Phone (direct):** 973.758.6100
- **Phone (toll free):** 877.979.5462
- **Fax:** 973.758.6120
- **Email:** info@swktech.com

Call the direct or toll-free number for immediate assistance, send an email for support requests or inquiries, or use the fax number to send documents.

What's next

With these steps, you can export customer records, transaction history, sales order lines, Explorer grid data, and formatted reports from Sage 100 into Excel. Once exported, use the formatting tips above—adjusting column

widths, row heights, and header alignment—to prepare your data for analysis or reporting.