

Excelling in data exporting



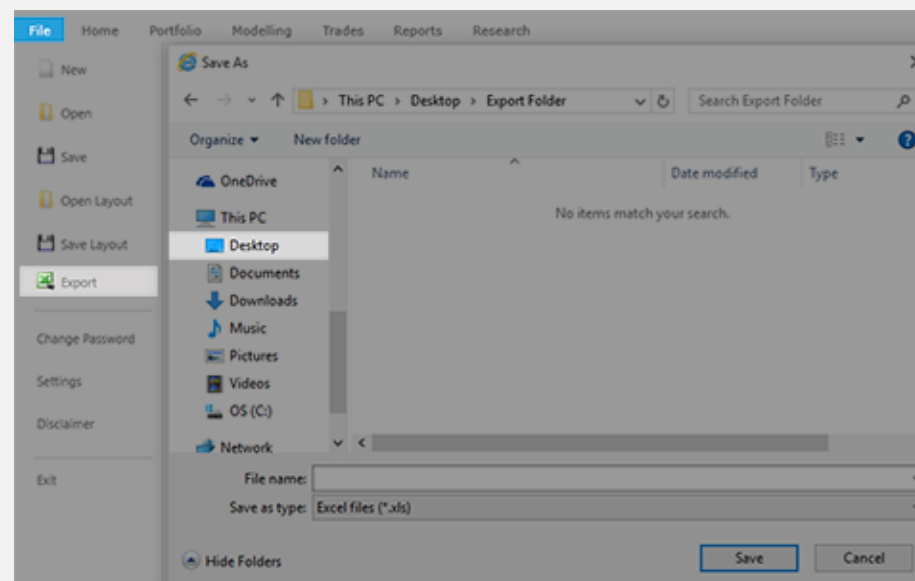
If you need to view all your clients on an Excel spreadsheet:

1. Select the list you wish to export (i.e. Portfolios, Accounts etc).

Portfolio	Name1	Name2	Account Manager	Dealing Type	Reporting Currency	Alloc. Total Cash	Alloc. Total MV
+ 0000000	Name 1	Name 2	Account Manager	Advisory Dealing	USD	£86,372.13	£1,515,970.76
+ 0000000	Name 1	Name 2	Account Manager	Discretionary	GBP	£883.43	£277,501.29
+ 0000000	Name 1	Name 2	Account Manager	Execution-only	GBP	£3,256.15	£219,278.89
+ 0000000	Name 1	Name 2	Account Manager	Discretionary	GBP	£84,632.42	£343,272.76
+ 0000000	Name 1	Name 2	Account Manager	Discretionary	GBP	£182.57	£351,472.75

2. Click on "File" and select the "Export" option.

3. A "Save As" window will appear and prompt you to choose the location you wish to save the exported file to. The file will not open automatically.



All lists, including the Trade Blotter, can be exported.

If you have any queries, please do not hesitate to contact your Relationship Manager or [MyCredo Support](#).

MyCredo Support
 UK +44 (0)20 7968 8324
 SA +27 (0)11 463 6312
mycredo-support@credogroup.com