

Exporting Dashboard Data from Financial Analytics

Last Modified on 07/21/2022 12:20 pm EDT

Version 20.17

This is a contracted feature available to OP Cloud Practices. Contact your Client Account Manager for more information.

About

You can easily share your Practice's financial insights by exporting the data from the Financial Analytics' Dashboards. Export is available as PDF, Image, and Excel. To activate the **Export To** button, simply hover over the upper right-hand corner of the Dashboard you want to export to.



Export Dashboard Data

Export to PDF

- 1. Navigate to the Dashboard you want to export and activate the Export To button.
- Select the Export Method from the Export To options. The Export To window, specific to the option you selected, is displayed.

Note: The Export To window is displayed in the center of the window, so depending on how many Dashboards are displayed, you may have to scroll up or down to locate and complete the Export To window details.

Export to Excel (CSV)

Export to Image

	All Dashboards		Not applicable to Worklists		All Dashboards	
Export To PDF - Charges, Payments, Adjustme ×		Export To Image - Charges, Payments, Adjust ×		Export To Excel - Charges, Payments, Adjustm ×		
File Name: Page Layout:	Charges, Payments, Adjustments by Month Portrait Landscape	File Name: Show Title: Title:	Charges, Payments, Adjustments by Month	File Name: Excel Format:	Charges, Payments, Adjustments by Month XLSX •	
Size:	Auto	Image Format: Resolution (dpi):	PNG •	Separator:	, Filters	
Show Title: Title:	Charges, Payments, Adjustments by Month	Include:	Filters	Position:	Parameters Below *	
Size Mode:	None Stretch Zoom	Reset	Parameters Export Cancel	Reset	Export Cancel	
Include:	Filters Parameters					
Position:	Below •					
Reset	Export Cancel					

- 3. Complete the fields in the window.
- 4. Click the Export button.





