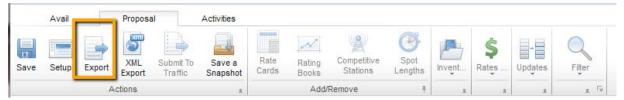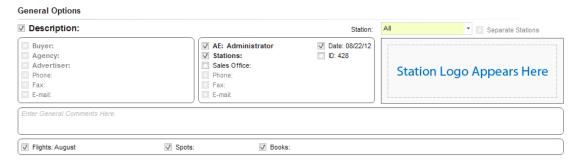# Avail/Proposal Export Wizard

WO Sales v3.0

- Avail/Proposal exports have been completely redesigned for v3.0.
- Quickly export a formatted Avail or Proposal .pdf document, or export a "data dump" to Excel.

- Click **Export** from the Avail/Proposal search screen, the Avail tab, or the Proposal tab to generate an export document.
    - o Clicking Export on the Avail tab will open the Avail Export wizard.
    - o Clicking Export on the Proposal tab will open the Proposal Export wizard.
    - o Clicking Export on the Search screen will open the Export wizard for the last edited tab.
- The Avail Export wizard is divided into two tabs: **Options** and **Preview**.
- The Proposal Export wizard has three tabs: **Options**, **Summaries**, and **Preview**.

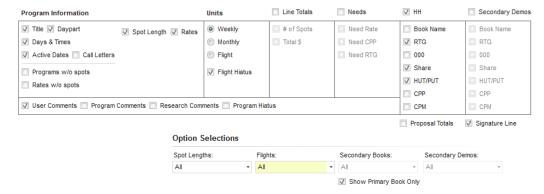### Proposal Options/Avail Options Tab

- The **Proposal Options** and **Avail Options** tabs are divided into sections that mimic the layout of the exported file.

- Use the **General Options** section to make header selections for your export.
- Check the boxes to select the items you want to display on your export.

- The **Program Information** section is slightly different on the Proposal and Avail exports, to reflect the differences in their export layouts:
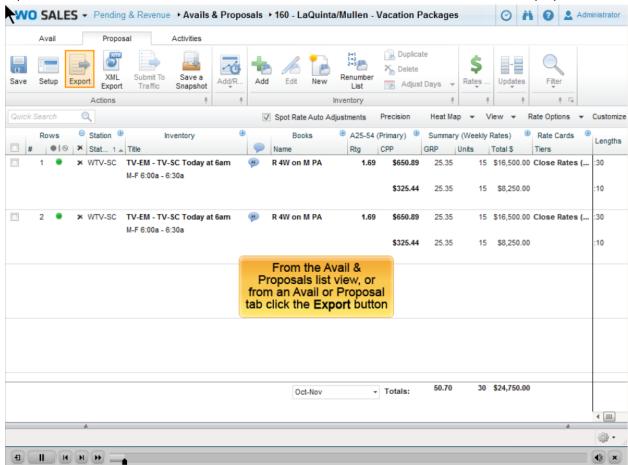

- For example, the Proposal Export can contain Units and Totals information.
- Click **Next** to move to the next step in the wizard.
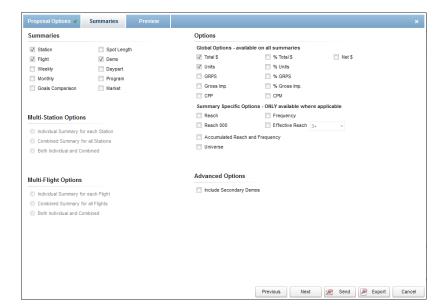
VIDEO

Options tab behavior can be seen in the video below. Click the arrow in the lower left to play:

Summaries Tab

- The **Summaries tab** is available only on Proposal exports.
- Select the **Summaries** you want to include.
- Select the **Options** that will be applied to those summaries. All selected options will apply to all included summaries.
- On multi-station and multi-flight proposals, you have additional options to break out or combine summaries by station/flight.
- Click **Next** to move to the final step in the wizard.

Preview Tab

- Select a **Portrait** or **Landscape** page orientation.
- Select a **PDF** or **Excel** output.
  - PDF exports are non-editable.
  - Excel exports are formatted, but do allow for some editing.
- In a <u>future</u> version of WO Sales, you will be able to select a **Font Size**.
- Click **Refresh Preview** to see a print preview of your export document.
- Click **Send** to create your export and attach it to an email form in one step.
- Click **Export** to just create the export file.
- Click **Cancel** to close the wizard without creating an export.