PROCEDURE

HOW TO GENERATE EXCEL DOCUMENTS

QUINTET
PRIVATE BANK

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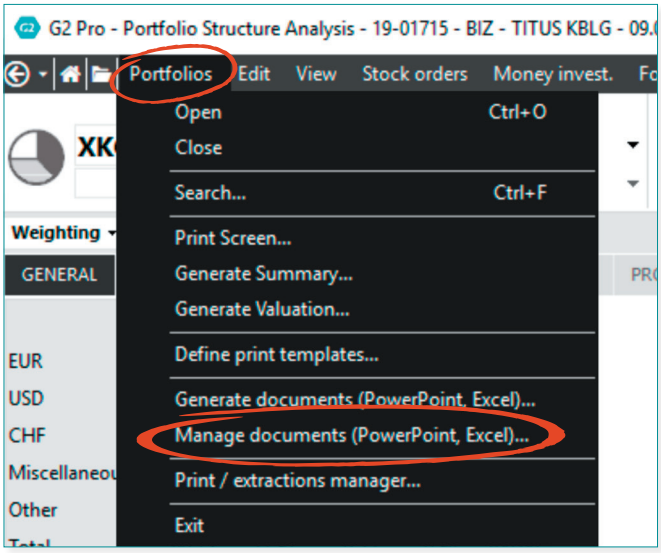
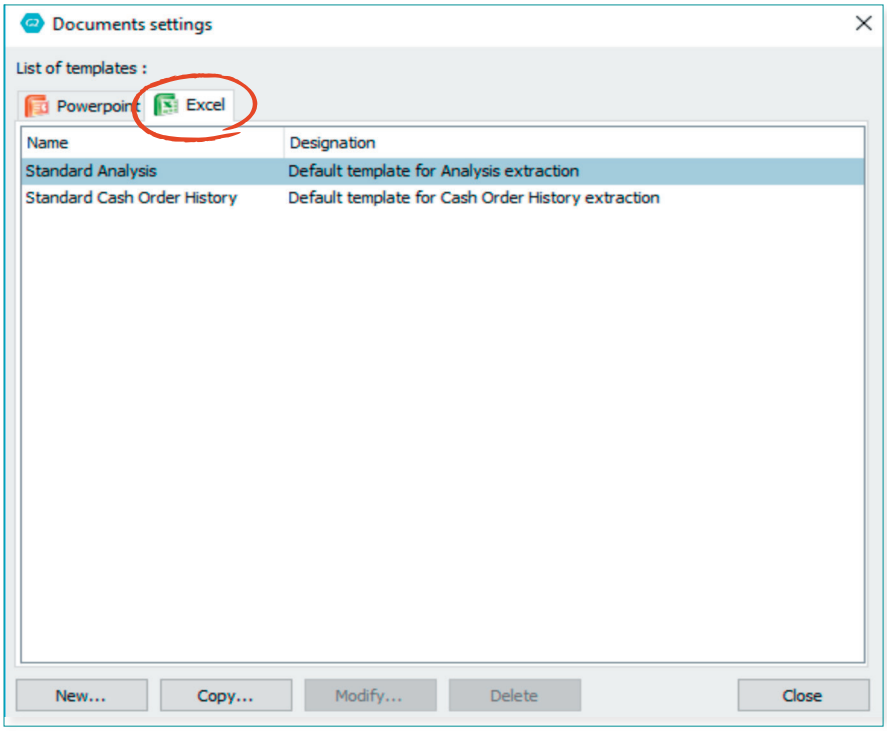
How to generate a Template for an excel document

You can generate documents (pdf or excel format). We recommend to create before a template, in order to have all information you need.

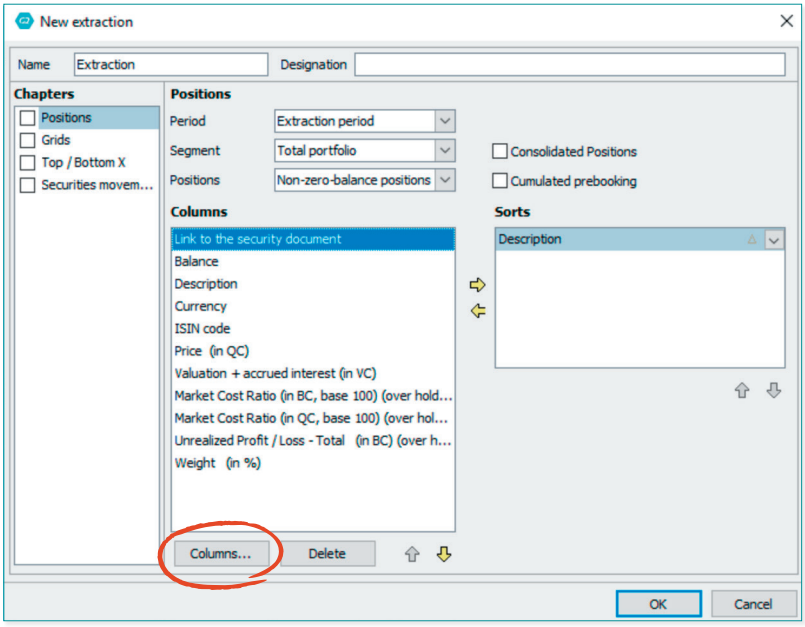
Go to "Portfolios" and "Manage documents"



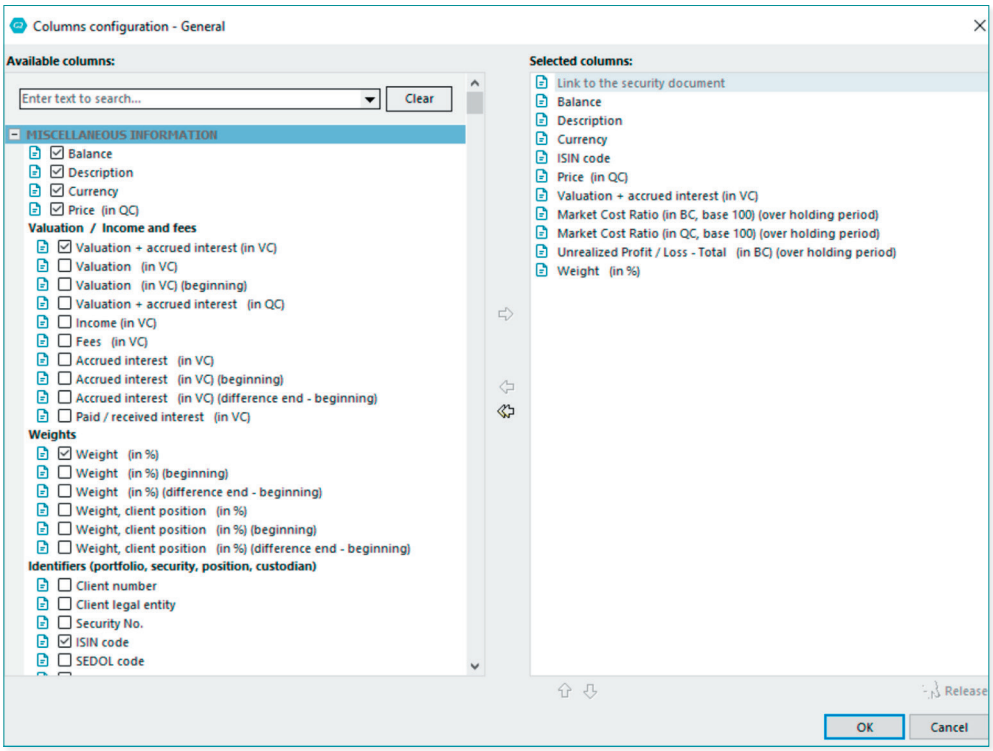
Then select the Excel tab and "New" (You can create templates for PowerPoint as well)



Then click on "Columns"



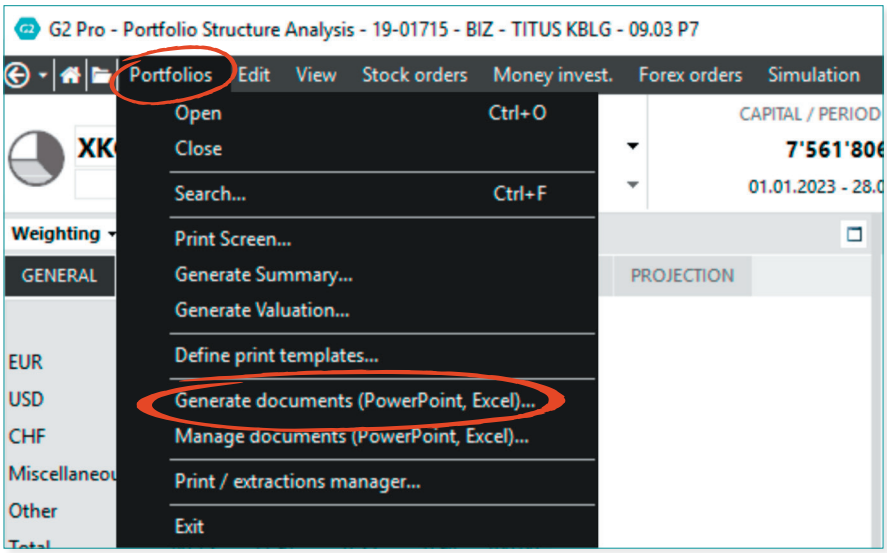
Here you can select what you need in your report . Finish by clicking on "OK"



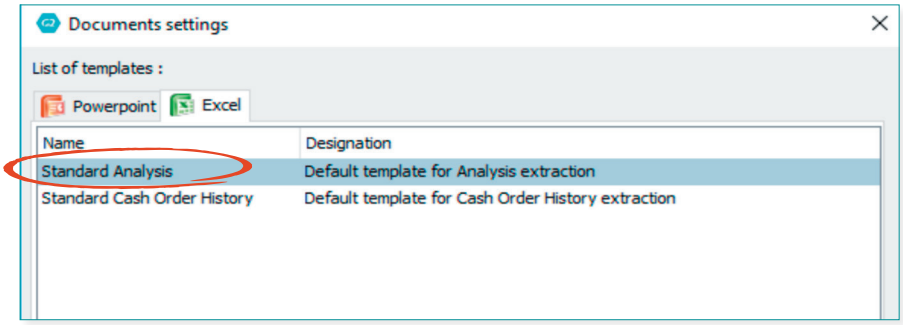
Once you have finished, you can generate the excel document using your template.

How to generate an excel document

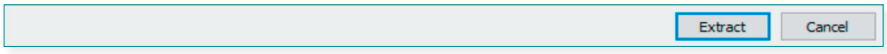
If you want to generate an excel document, please go to the menu "Portfolios" and "Generate documents"



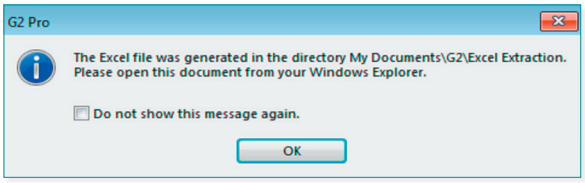
Select the "Excel" Tab and select the Template you just created



Click on "Extract" to finish and export the data

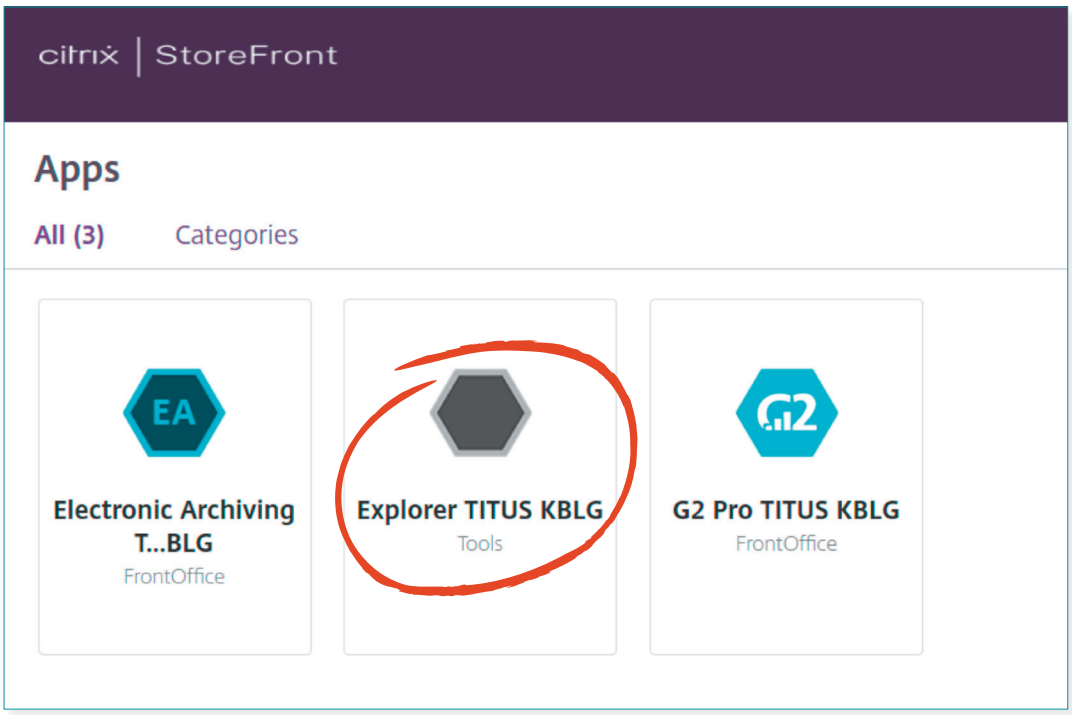


Once finished, you will see a message:

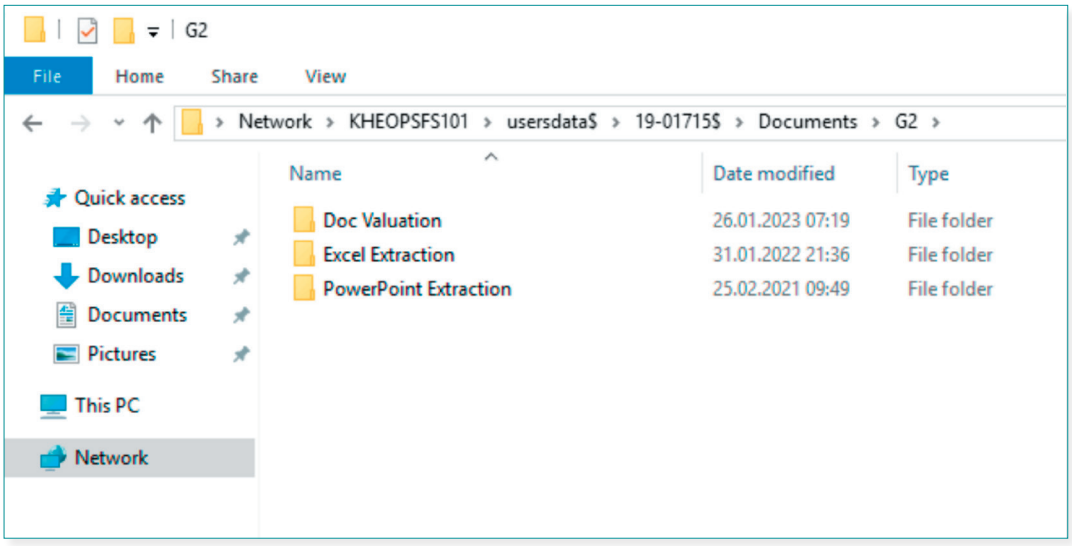


How to copy the documents on your own PC

Please return to the myquintetpro portail and select "Explorer TITUS KBLG" to get back your file

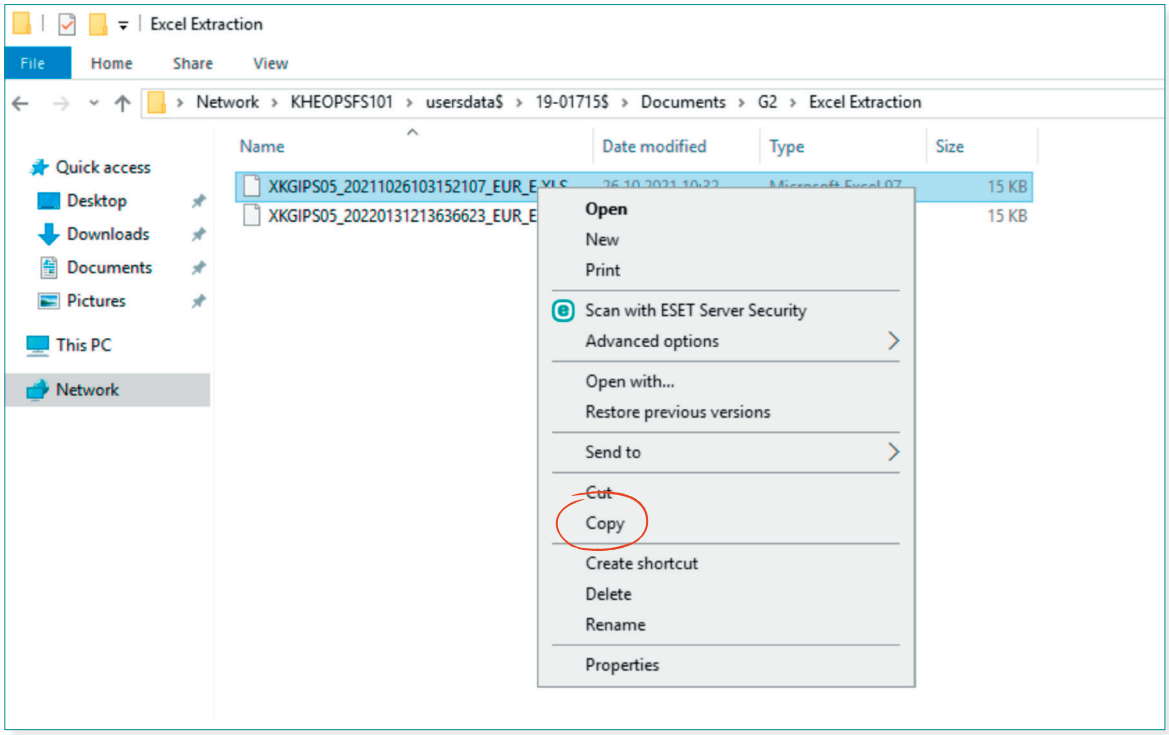


Go in the **G2** Folder

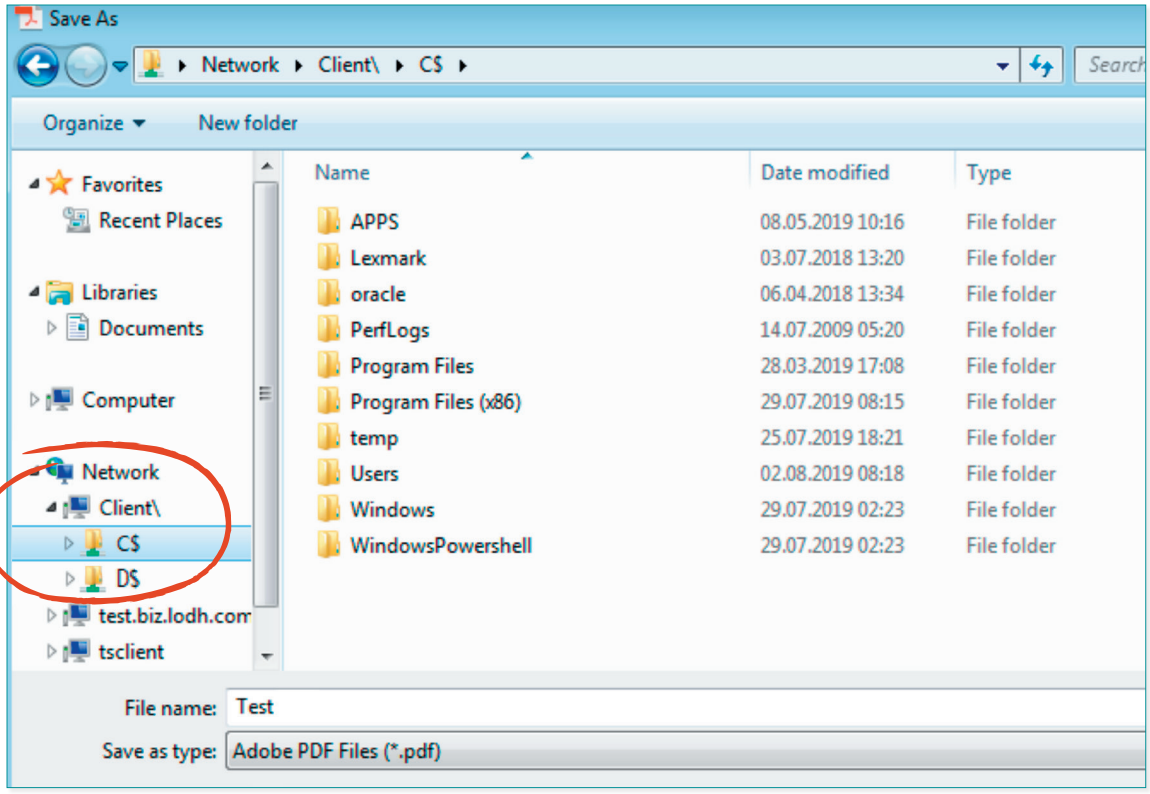


And then, **"Excel Extraction"**

You will the see the list of your generated files. Please select the one you need, right click on it and select "Copy" (CTRL+C)



Then, select “Network” ➔ “Client” ➔ “C$”



On the right, you will have your C:\ drive and you will be able to save your document.
If you want to save it into your desktop, then continue on the right side to select “Users”, then your username and “Desktop”. Paste your document here.

QUINTET PRIVATE BANK

43, BOULEVARD ROYAL
L-2449 LUXEMBOURG
T: +352 47 97-1
CONTACT@QUINTET.COM

WWW.QUINTET.COM