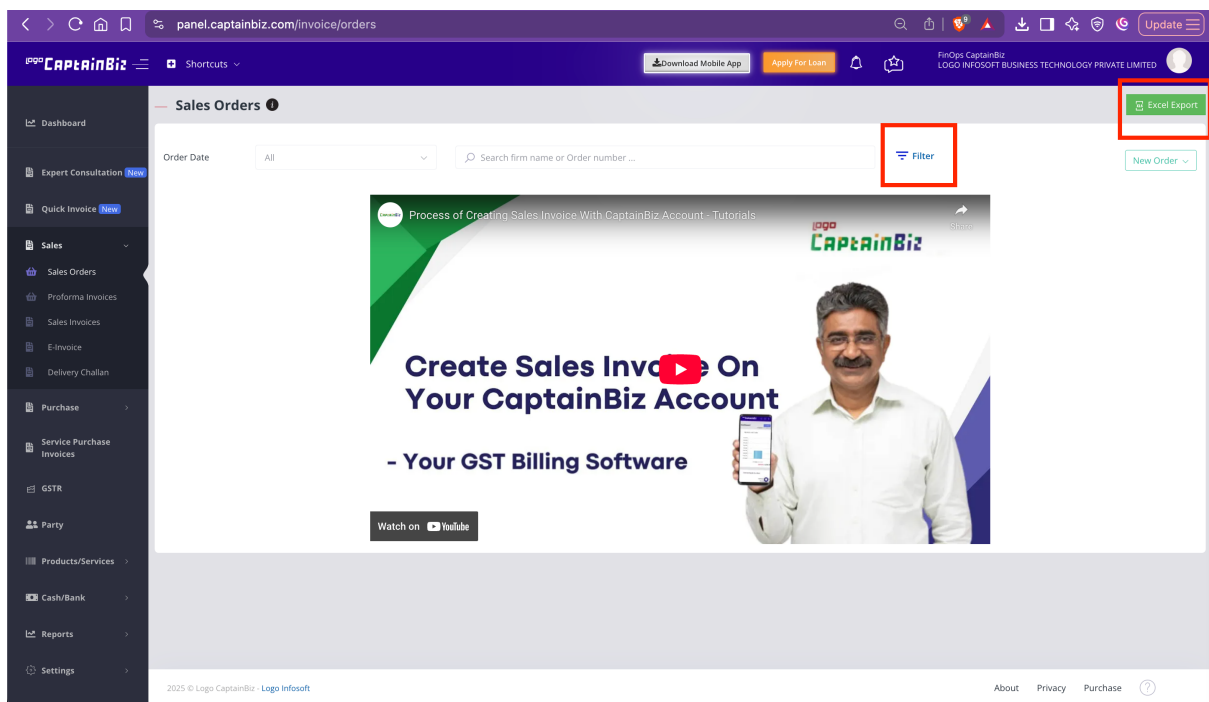# CaptainBiz Data Download Instructions

Overview

This guide provides comprehensive instructions for downloading your business data from the CaptainBiz platform. You can export data from various modules within the system, with flexible filtering options to retrieve exactly the information you need.

General Export Process

All data exports follow a consistent process throughout the platform:

1. Navigate to the desired module and data section
2. Apply any relevant filters to refine your data selection
3. Click the **"Excel Export"** button located in the top right corner of the screen
4. Your filtered data will be downloaded as an Excel file

Note: If no filters are applied, the system will export all available data for that section.

Available Data Export Modules

Sales Module

Sales Orders Access comprehensive order information with the following filtering options:

- Order Date
- Order Status
- Prepayment Status
- Order Category
- Amount
- Order Type

This export provides complete visibility into your sales order pipeline and transaction history.

Proforma Invoices Export proforma invoice data with the following available filters:

- Proforma Date
- Proforma Slip Status
- Amount

This allows you to track and analyze your preliminary invoice documentation and customer quotations.

Sales Invoices Download detailed sales invoice records with extensive filtering options:

- Invoice Date
- Amount
- Invoice Category
- Payment Date
- Invoice Status
- Invoice Type
- Service Group Name

This comprehensive export supports detailed financial analysis and reporting.

Delivery Challan Export delivery challan information with the following filters:

- Delivery Challan Date
- Amount
- Delivery Challan Type

This data provides insights into your goods delivery documentation and logistics operations.

Purchase Module

Purchase Orders Access your purchase order data with the following filtering options:

- Order Date

- Order Status
- Prepayment Status
- Order Category
- Amount

This export helps track supplier relationships and procurement activities.

Purchase Invoices Export purchase invoice records with the following filters:

- Invoice Date
- Amount
- Invoice Category
- Transaction Type

This data supports expense tracking and vendor payment analysis.

Service Purchase Invoices Download service-related purchase invoices with the following filters:

- Invoice Date
- Amount

This specialized export focuses on service procurement and related financial transactions.

Party Management

Party Information Export comprehensive party (customer/supplier) data with the following filtering options:

- Party Status
- Balance
- Party Type
- Category

This export provides complete contact and relationship management information for your business network.

Products and Services

Products Access detailed product information with the following filtering options:

- Product Status
- Date
- Category
- Brand
- Reserved Quantity
- Actual Quantity

This export supports inventory management and product performance analysis.

Services Export service-related data with the following filters:

- Service Status
- Category

This information helps track service offerings and performance metrics.

Stock Transactions Download stock movement records with the following filtering options:

- Record Status
- Date
- Transaction Type

This export provides comprehensive inventory tracking and audit trail information.

Reports Module

Sales Summary Generate comprehensive sales reports with the following filtering options:

- Invoice Date
- Invoice Type
- Customer
- Category

This export provides high-level sales performance insights and trend analysis.

Service Purchase Summary Access detailed service purchase analytics with the following filters:

- Transaction Date
- Service Purchase Status
- Payment Status
- Payment Date
- Service Group
- Service Name

This report supports service procurement analysis and cost management.

Sales-Purchase Totals Export consolidated sales and purchase totals with the following filters:

- Year
- Month

This summary report provides period-based financial overview and comparison capabilities.

Purchase Summary Generate purchase analysis reports with the following filtering options:

- Invoice Date
- Invoice Type

- Supplier
- Category

This export supports vendor performance evaluation and procurement insights.

Order Summary Access comprehensive order analytics with the following filters:

- Order Status
- Payment Status
- Invoice Date
- Amount
- Currency

This report provides complete order lifecycle visibility.

Transaction Report Export detailed transaction records with the following filtering options:

- Status
- Transaction Date
- Payment Method

This comprehensive report supports financial reconciliation and audit requirements.

Low Stock Report Generate inventory alerts and analysis with the following filters:

- Status
- Item Name
- Stock
- Item Code
- Category Name
- Brand Name

This critical report helps maintain optimal inventory levels.

Subscription Management

Subscription Information Access your subscription and billing history by navigating to Profile → Company Settings → Subscription Information → Profile (top right) → Order. From this section, you can download all available subscription invoices for your account.

Important Considerations

- **Data Accessibility**: All exports are available until September 15th, 2025
- **Filter Flexibility**: You may apply any combination of available filters or export complete datasets
- **File Format**: All exports are provided in Excel format for easy analysis and integration
- **Data Completeness**: Ensure you export all necessary data modules before the deadline

Support

For technical assistance with the data export process, please contact our support team before the service discontinuation date. We recommend completing all data exports well in advance of the September 15th, 2025 deadline to ensure you have sufficient time to verify and organize your downloaded information.

This document serves as your complete guide to retrieving all business data from the CaptainBiz platform. Please retain this information for reference during your data migration process.