

Excel Sum Totals

Prepared for

myUnity Essentials Financial



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Overview

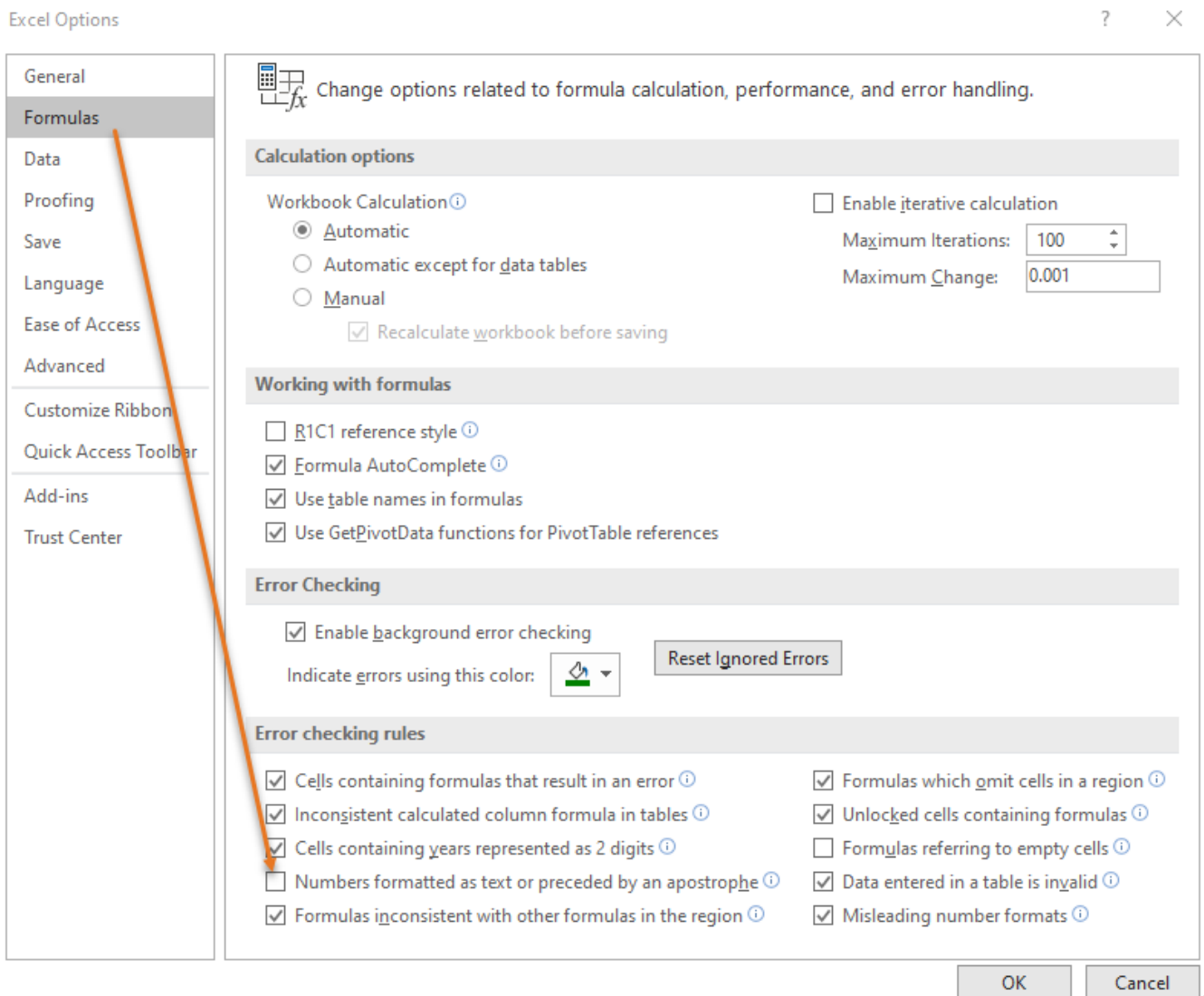
Follow these steps if you are unable to generate sum totals in myUnity Essentials report export files when viewed in MS Excel.

Excel Options: Formulas Setting

With the report opened in MS Excel, go to the **File** menu and click **Options** at the bottom.

In the Excel Options window, click on **Formula** to the left.

Un-check the option for “**Numbers formatted as text or preceded by an apostrophe.**”



Data Tab: Text to Columns setting

Click the column to be summed ("L" in example below).

Go to the **Data** tab.

Click "**Text to Columns**" then click "**Finish**".

Repeat these steps for all other desired columns.

The screenshot shows the Excel ribbon with the 'Data' tab selected. The 'Data Tools' group contains the 'Text to Columns' button, which is highlighted with an orange box. Below the ribbon, a spreadsheet is visible with columns A through R. Column L is highlighted with an orange box. The spreadsheet data is as follows:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
			Patient	Patient#	Bill-Date	Total-Amt	Paid-Amt	Adj-Amt	Amt-Due	Current	Over-30	Over-60	Over-90	Over-120	Contract	Birth	Claim	From-D
1			Aarons, Anthony	202		6,285.57	0.00	0.00	6,285.57	1,711.67	3,004.87	0.00	1,569.03	0.00		11/5/1984		
2			Aarons, Billy	131693		2,231.43	0.00	0.00	2,231.43	0.00	0.00	2,231.43	0.00	0.00		10/25/1937		
3			Abbie, Abby	131345		3,752.69	0.00	0.00	3,752.69	2,682.66	0.00	458.58	611.45	0.00		5/29/1949		
4			Abbingtion, Abigail	131753		185.10	0.00	0.00	185.10	0.00	0.00	0.00	185.10	0.00		2/29/1944		
5			Activity, Tess	224		3,293.71	0.00	0.00	3,293.71	0.00	0.00	3,293.71	0.00	0.00		1/8/1943		
6			Adams, Noel	342		2,530.17	0.00	0.00	2,530.17	0.00	2,530.17	0.00	0.00	0.00		2/4/1957		
7			Admit, November	303		2,525.78	0.00	0.00	2,525.78	0.00	2,525.78	0.00	0.00	0.00		8/15/1965		
8			AdmitTwentyone, January	312		306.29	0.00	0.00	306.29	0.00	0.00	0.00	306.29	0.00		5/1/1954		
9			Aguilar, Maria	244		695.76	0.00	0.00	695.76	0.00	0.00	695.76	0.00	0.00		1/1/1942		
10			Andboard, Rooma	278		6,793.85	0.00	0.00	6,793.85	6,793.85	0.00	0.00	0.00	0.00		5/18/1945		
11			Andersenhos, Authtesting	131597		9,512.26	0.00	0.00	9,512.26	4,463.86	5,048.40	0.00	0.00	0.00		4/13/1987		
12			Andfinal, Rap	298		1,384.06	0.00	0.00	1,384.06	251.06	0.00	0.00	1,133.00	0.00		5/14/1965		