Corporate Online

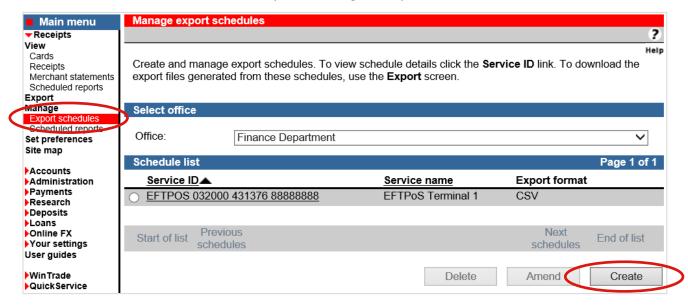


Creating export schedules.

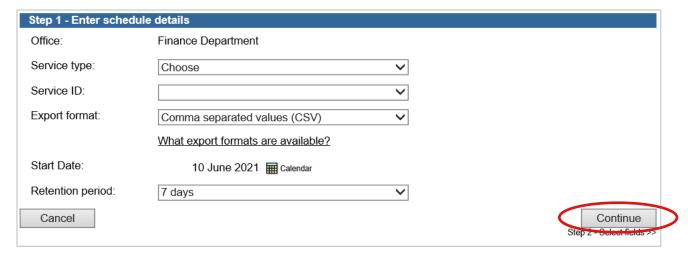
Follow this guide to create an export schedule under which Corporate Online will generate regular export files in Comma Separated Values (CSV) format to download to a computer or network.

To perform this procedure, you need access to the **Export** feature, an office, and the **Receipts** service to include in the export schedule.

1. From the left-hand menu, select Receipts > Manage > Export schedules.



2. Choose an Office from the list and then select Create.



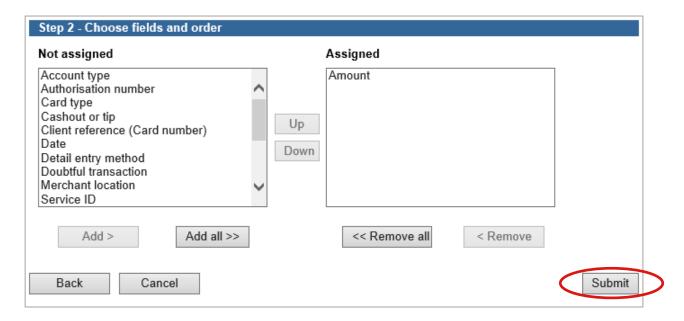
- 3. Complete the details as follows:
 - Select a Service type from the list.
 - Select a corresponding Service ID from the list.
 - Select an **Export format** from the list.
 - Select a Start date using the calendar.
 - Select a **Retention period** from the list.
 - Select Continue. Choose fields and order is displayed.

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Add >



- 4. Complete the details as follows:
 - Select the **fields** to be assigned access from the **not assigned** list on the left and then select **Add** >.
 - Select a field from the Assigned list, and then select either Up or Down to move to the required position.

Note: The order of fields from top to bottom will be the order of fields from left to right in your export file.

• Select **Submit** to save the export schedule.

Corporate Online saves the details of the schedule. A file will generate each time a transaction is available. The export file will be available to download from **Receipts** > **Export**.

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