

Exporting account information.

Follow this guide to export Account information in a chosen format and save it to your computer or network for reconciliation.

To perform this procedure, you require access to the **Export transaction information** feature to an **Office** and those **Groups / Accounts** included in the export file.

1. From the left-hand menu, select **Accounts > Export**.

Corporate Online displays the **List of export files** for the past 7 days.

Export accounts

Select the files to export, then click **Export**. To export selected accounts within a group, click the **Description** link. To sort export files, click the field name you want to sort by (e.g. Description). To request export files, use the **Manage - Export schedules** screen.

Select office, export format and dates

Office: Sydney Central Office

Export format: Comma separated values (CSV)

Start date: 3 November 2021

End date: 9 November 2021

Description: daily

Update list
Clear

Export list Page 1 of 1

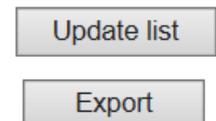
Description	Accounts available	Export format	Group/Account	Date	Status
<input type="checkbox"/> Daily transactions	9 of 9	CSV	AUD Accounts	08 Nov 2021	Ready for export
<input type="checkbox"/> Daily transactions	9 of 9	CSV	AUD Accounts	05 Nov 2021	Ready for export
<input checked="" type="checkbox"/> Daily transactions	9 of 9	CSV	AUD Accounts	04 Nov 2021	Ready for export
<input type="checkbox"/> Daily transactions	9 of 9	CSV	AUD Accounts	03 Nov 2021	Ready for export
<input type="checkbox"/> Select all on this page					

Start of list Previous export files Next export files End of list

Export

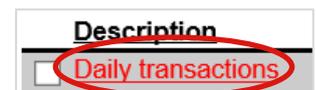
2. Complete any of the following.

- Use the **Office**, **Export format**, **Start date** and **End date** options to filter the files displayed in the list and select **Update list**.
- Choose the files to be exported and then select **Export**.



Corporate Online displays the **export being processed** screen, then displays a File download dialog. Wait for it to appear and follow the instructions to save the export file to your computer or network.

- To export selected accounts within a group select the **Description** link for a file. **Export account list** is displayed.
- Choose the account(s) to export and then select **Export**.



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