

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.

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

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

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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

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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

☐ Select all on this page

Export

- 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**.
 - THEN**
 - Choose the files to be exported and then select **Export**. (Go to Step 3)
 - OR**
 - To export selected accounts within a group select the **Description** link for a file. The **Export account list** is displayed.
 - Choose the account(s) to export and then select **Export**. (Go to Step 3)
- Corporate Online displays the **Export being processed** screen. What happens next depends on the browser you're using to access Corporate Online (i.e.: Internet Explorer, Google Chrome, Mozilla Firefox, Microsoft Edge, Safari etc).
 - Wait for the export file to appear and then save it to your computer or network.