Export options

When exporting data, you can choose export options in the Import and Export Assistant. The selections vary depending upon the type of information you're exporting.

- **Accounts**. If you're exporting accounts, select to export account balances from the current or previous financial year, then select the period whose ending balances you want to export.
- **Customer, supplier, employee or personal cards**. If you're exporting customer, supplier, employee or personal cards, you can restrict the people whose records you export by entering identifiers and postcodes.
  If you enter more than one identifier in the Identifier field, records will be exported only for those people who have been assigned all the identifiers you entered.
  If you enter a partial postcode in the Postcode field, records will be exported for all people whose postcodes match the sequence of numbers you entered.
- **Transaction journal entries**. If you're exporting transaction journal entries, choose the journal you want to export from. You can also select a time period to restrict the journal entries to export.
  If you're exporting transactions from the Receipts journal, you can even choose which type of receipt you wish to export -- Receive Money, Customer Payments, Supplier Refunds or All.
  If you're exporting transactions from the Disbursements journal, you can also choose which type of disbursement you wish to export -- Spend Money, Pay Employees (Plus and Premier, Australia only), Pay Bills, Customer Refunds or All.

- **Inventory adjustments (Not Basics)**. If you're exporting inventory adjustments, enter a time period to restrict the inventory adjustments to export.
- **Sales or purchases**. If you're exporting sales or purchases, you can restrict the transactions you export by the identifiers assigned to the customers and suppliers with which you conducted the transactions. You can also select a time period to restrict the sales and purchases to export. In addition, you can choose the layout of sales or purchase orders (service, item, professional or miscellaneous) you want to export and the status of sales and purchases (invoice/bill, order or quote).

Learn more about exporting from AccountRight.

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