



# Oneir-Exporting to Excel

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The first step in exporting documents is to set up your folder that the reports will be saved to. These should be created on your PC in your C: drive as follows:

C:\export

Now you are ready to start exporting files using the following steps:

*(Note: Not all reports are available for exporting)*

The Customer Accounts Receivable ledger is the report used in this example.

When you get to the bottom of the report selections you will be asked if you would like to export the report to file; you will change the N to Y.

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**TUTORIAL COMPANY: Accounts Receivable Ledger**


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```

| Print Detailed Accounts Receivable Ledger Report for date range.
| Print receivables and deposits.

| Print report for all divisions.

| Start on 04.12.01.
| Stop on 04.12.31.

| Start with bill to '1'.
| Stop with bill to 'WHEWOR'.

| Print report for all territories.
| Print report for all types.
| Print report for all terms.
| Print report for all salesreps.

| Print regular ledger.
| Print all postings.

| Do you wish to export the report to file?  N

```

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You will then get prompted to confirm if the above is correct.

When you select Y the above is correct then you will see a prompt that asks you where you would like to save your file.

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**TUTORIAL COMPANY: Accounts Receivable Ledger**


---

```

| Print Detailed Accounts Receivable Ledger Report for date range.
| Print receivables and deposits.

| Print report for all divisions.

| Start on 04.12.01.
| Stop on 04.12.31.

| Start with bill to
| Stop with bill to '

| Print report for all territories.
| Print report for all types.
| Print report for all terms.
| Print report for all salesreps.

| Print regular ledger.
| Print all postings.

| Will export the report to file.

```

1. **Save to a folder on the Linux server**
2. Save to a mounted Windows folder
3. Save to a folder on this computer

Here is where you will select 3. Save to a folder on this computer

When you choose that it will give you an editable path to your C: drive

As you can see in the next diagram, it auto-fills the path and name for you.

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**TUTORIAL COMPANY: Accounts Receivable Ledger**


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- | Print Detailed Accounts Receivable Ledger Report for date range.  
| Print receivables and deposits.
- | Print report for all divisions.
- | Start on 04.12.01.

Enter full path name and file name: e.g. c:\export\report  
c:\export\arledger.txt\_

- | Print report for all types.
- | Print report for all terms.
- | Print report for all salesreps.
- | Print regular ledger.
- | Print all postings.
- | Will export the report to file.

The most important thing to remember is to change the file extension name to .xls

In this example the report name has been changed from the generic name of the report to one that is more specific to the report:

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**TUTORIAL COMPANY: Accounts Receivable Ledger**


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- | Print Detailed Accounts Receivable Ledger Report for date range.  
| Print receivables and deposits.
- | Print report for all divisions.
- | Start on 04.12.01.

Enter full path name and file name: e.g. c:\export\report  
c:\export\arledgeratapril302022.xls\_

- | Print report for all types.
- | Print report for all terms.
- | Print report for all salesreps.
- | Print regular ledger.
- | Print all postings.
- | Will export the report to file.

Note that the file type was also changed to .xls

You should then get the following message stating that the report is now downloaded to your "report" folder in C: drive.

### TUTORIAL COMPANY: Accounts Receivable Ledger

Print Detailed Accounts Receivable Ledger Report for date range.  
Print receivables and deposits.

Print report for all divisions.

Start on 04.12.01.  
Stop on 04.12.31.

Start with bill to '1'.  
Stop with bill to 'WHEWOR'.

```
u./tdownload arledgeratapr1302022.xls c:\\export
```

Print report for all types.  
Print report for all terms.  
Print report for all salesreps.


Print regular ledger.  
Print all postings.

Will export the report to file.

```
Saved arledgeratapr1302022.xls with 317 records.  
Press <space> to continue. _
```

You can then open it from the “export” folder.

Folder path: This PC > Windows (C:) > Export

Name	Date modified	Type	Size
 arledgeratapr1302022	2023-11-06 9:36 AM	Microsoft Excel ...	33 KB

(Note: You will get the following message and just select yes to continue)

