



Exporting charges to other practice management systems

To export charges to a .CSV file:

- 1 Click **System, Export Charges, Other**
BankLink Practice displays the **Export Charges Options** window
 - 2 Click the **Month to export** field to select the required month
 - 3 The **Save Entries To** field defaults to **banklink.csv** - click the **Browse** button to select a folder and enter a different filename if required
 - 4 Click **Next** to continue
BankLink Practice displays the **Increase Charges** window where you can increase the charges by fixed and/or percentage amounts
 - 5 Click the **Fixed** check box if you want to specify a fixed dollar amount to add to each charge, or a fixed dollar amount to be split across all charges
 - 6 Click the **Percentage** check box If you want to specify a percentage amount to increase all charges by
-  If both Fixed and Percentage amounts are specified, the Fixed amount will be applied first, followed by the Percentage increase
- 7 Click the **View Statement and Download Document** link if you would like to see the PDF document version of the charges you are about to export
 - Enter the Statement and Download Documents password if prompted
 BankLink Practice displays the documents in a separate window which you can refer to while continuing with the export
 - 8 Click **Next** to continue
BankLink Practice displays the **Edit Charge Details** window
 - 9 You can enter or amend details in the **File Code** and **Cost Code** columns - changes made will be remembered the next time you export the file
-  When fixed and/or percentage amounts are added to the charges, BankLink displays an **Increased Charges** column in the transaction display - the column is editable so you can further adjust the charges if required
- 10 **Hide accounts with no charge this month** is ticked by default - remove the tick to see all accounts
 - 11 You can use the **Find** field and the **Next** and **Previous** buttons to search all the columns for a particular charge
 - 12 Select from:
 - **Report** to produce a report of the charges
 - **Save Data** to save changes you have made to the **File Code** and **Cost Code** columns if you need to exit the window before you complete the export
 - **Back** to select a different month to export or another file location to save the charges to
 - **Finish** to export the data

- **Cancel** to exit

When you export the data BankLink Practice displays an **Information** window confirming the number of charges exported, and the file to which they have been saved

13 Click **OK**



The charges are exported as displayed in the grid - net of GST



For information on importing the charges file into your practice management system please contact your supplier