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## OverNet Computer Services

### Mechanic helpdesk query

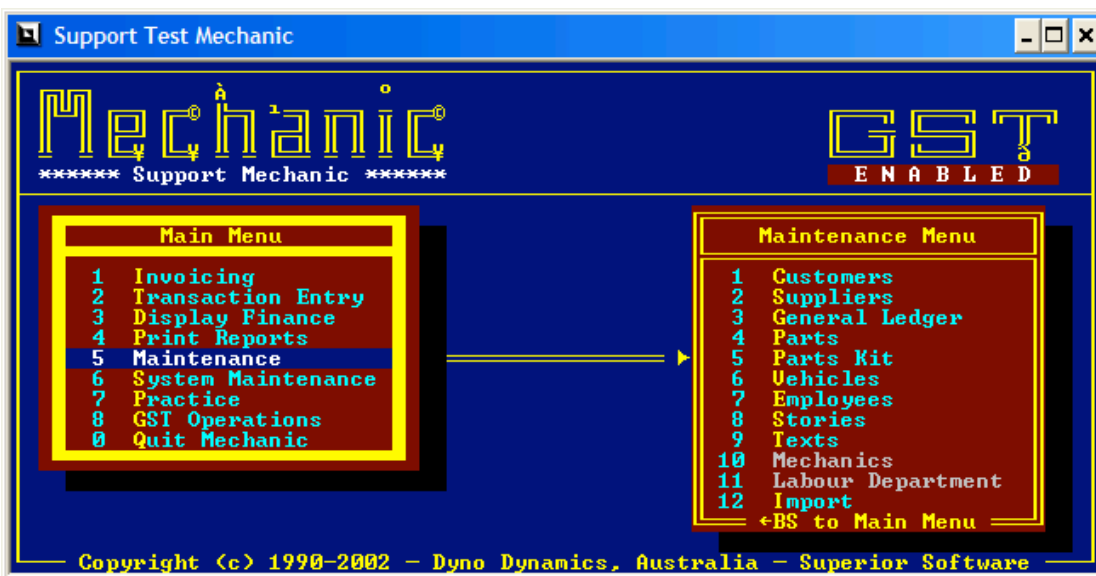
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#### Exporting Mechanic Data Into CSV Files.

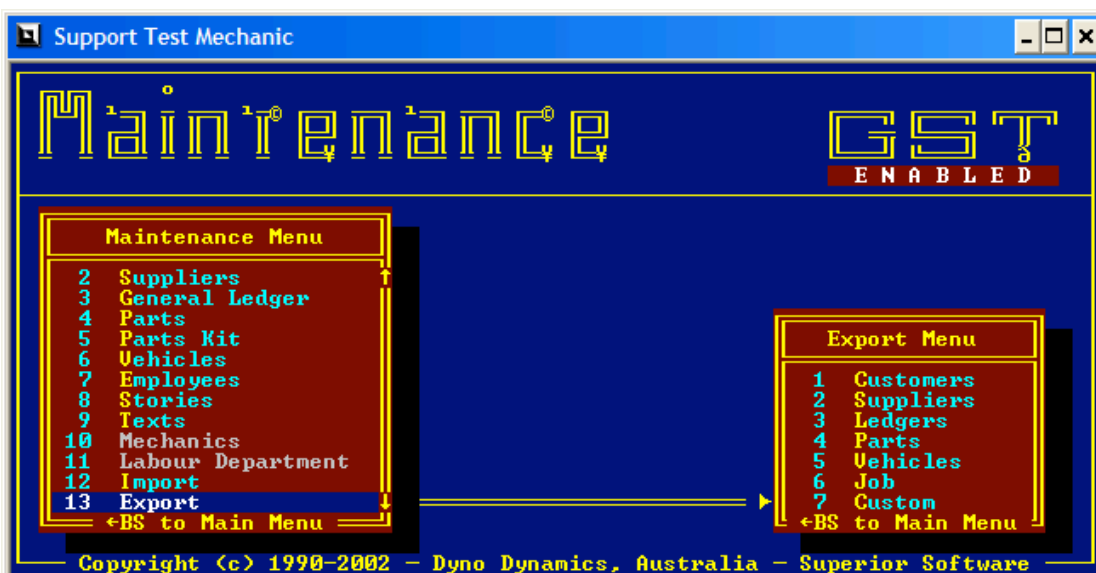
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The following procedure shows how to export the data fields from any ladder to a text file.

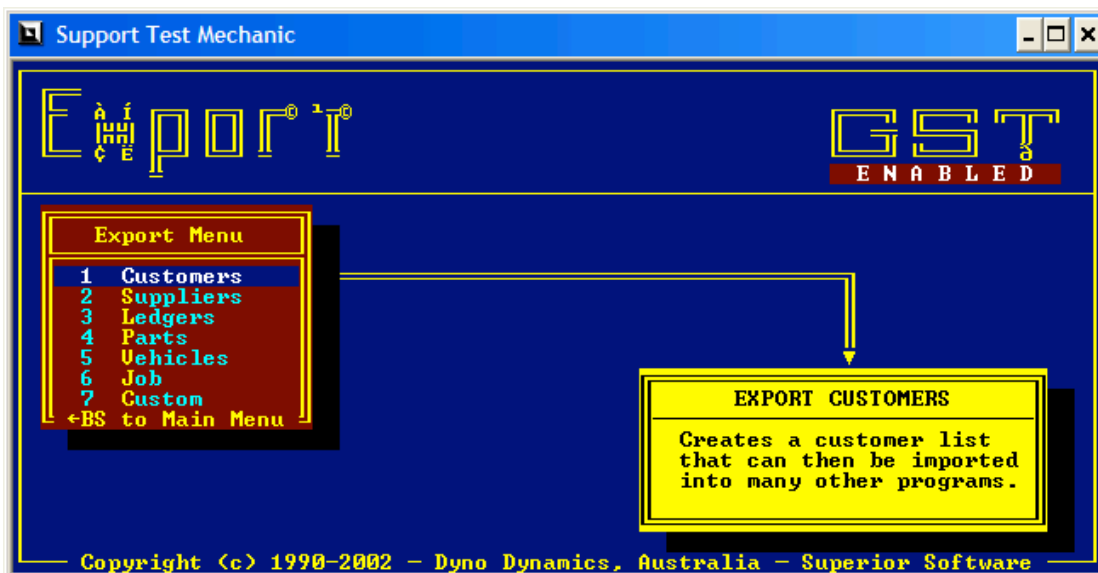
In this example we are exporting the customer details. However, the following procedure can also be used to export suppliers, ledgers, parts and vehicle data.



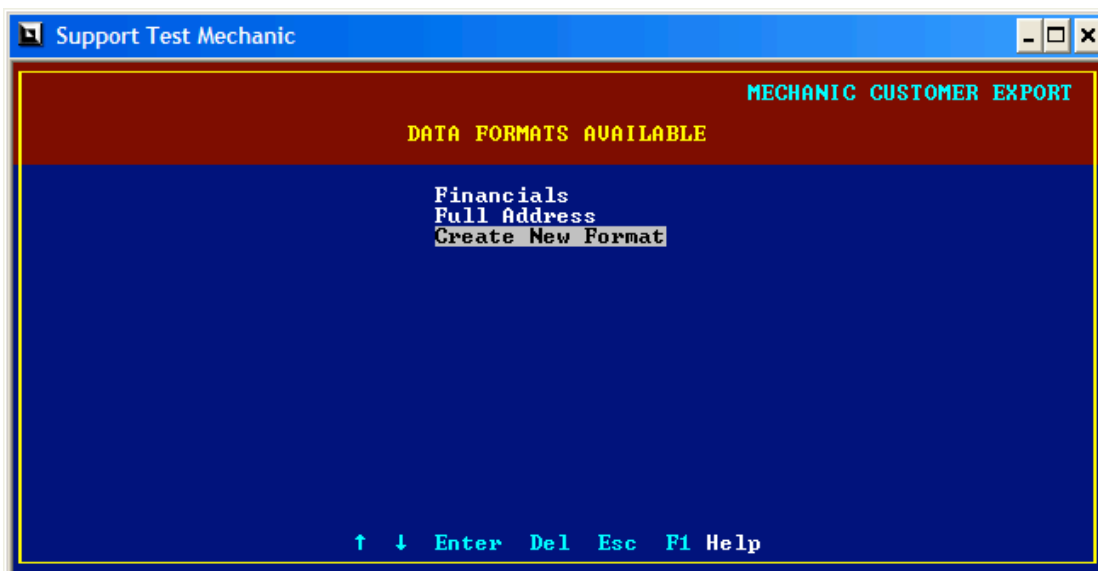
From the Main menu select Maintenance (5)



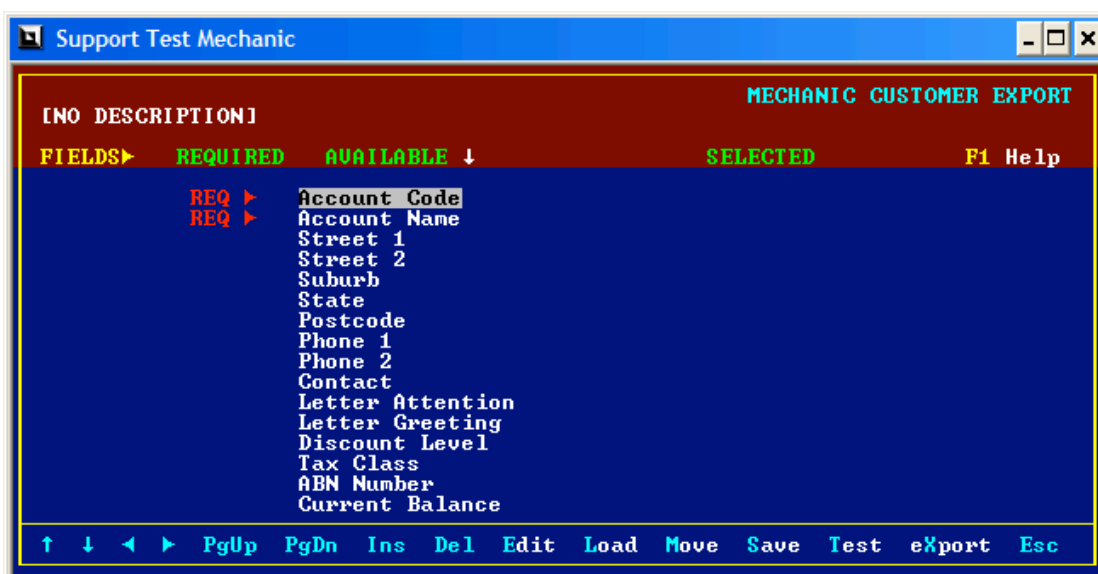
From the Maintenance menu, select Export (13)



From the Export menu, select Customers (1)



In this example we will create a new format exporting all fields.  
Arrow down to Create new format and press enter.



The screenshot shows a window titled "Support Test Mechanic" with a red title bar. The main content area has a dark blue background with white text. At the top right, it says "MECHANIC CUSTOMER EXPORT". Below this, there's a header section with "FIELDS▶", "REQUIRED", "AVAILABLE ↑", "SELECTED", and "F1 Help". The main table lists various fields with a "1" in the "REQUIRED" column and the field name in the "AVAILABLE" column. The "SELECTED" column lists the same fields. The "F1 Help" column is empty. The bottom of the window has a status bar with various function keys: ↑, ↓, ←, →, PgUp, PgDn, Ins, Del, Edit, Load, Move, Save, Test, eXport, and Esc.

REQUIRED	AVAILABLE ↑	SELECTED	F1 Help
1 Account Name	Account Name	Account Code	
1 Street 1	Account Name	Account Name	
1 Street 2	Street 1	Street 1	
1 Suburb	Street 2	Street 2	
1 State	Suburb	Suburb	
1 Postcode	State	State	
1 Phone 1	Postcode	Postcode	
1 Phone 2	Phone 1	Phone 1	
1 Contact	Phone 2	Phone 2	
1 Letter Attention	Contact	Contact	
1 Letter Greeting	Letter Attention	Letter Attention	
1 Discount Level	Letter Greeting	Letter Greeting	
1 Tax Class	Discount Level	Discount Level	
1 ABN Number	Tax Class	Tax Class	
1 Current Balance	ABN Number	ABN Number	
1 Tax Number	Current Balance	Current Balance	

↑ ↓ ← → PgUp PgDn Ins Del Edit Load Move Save Test eXport Esc

Support Test Mechanic

MECHANIC CUSTOMER EXPORT

[NO DESCRIPTION]

FIELDS▶	REQUIRED	AVAILABLE ↑	SELECTED	F1 Help
REQ ▶	1	Account Name	Account Code	
	1	Street 1	Account Name	
	1	Street 2	Street 1	

**CHOOSE EXPORT FORMAT**

Data field separator: Comma Tab **C**

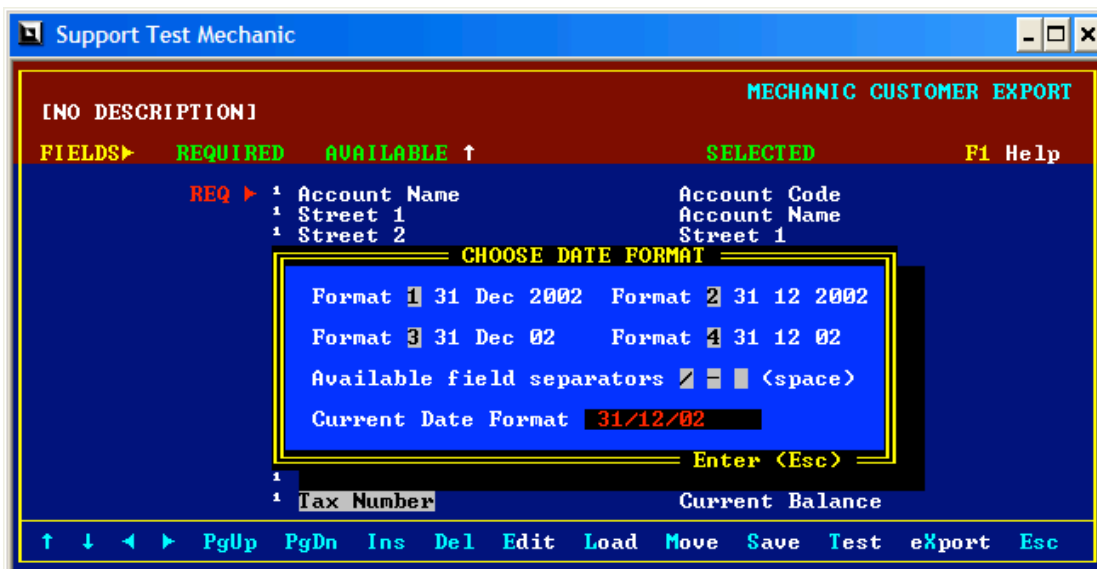
First record contains: Header Data **H**

Enter <Esc>

1	Discount Level	Letter Greeting
1	Tax Class	Discount Level
1	ABN Number	Tax Class
1	Current Balance	ABN Number
1	Tax Number	Current Balance

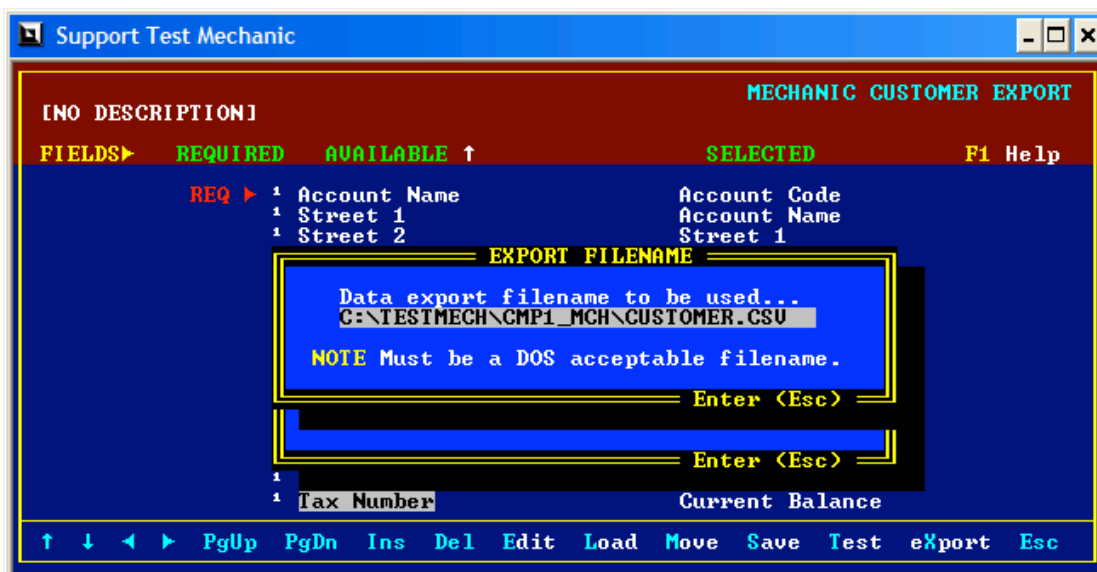
↑ ↓ ◀ ▶ PgUp PgDn Ins Del Edit Load Move Save Test eXport Esc

OVERNET:Soltec:soltec:faq:Exporting data from Mechanic into CSV files.doc



The next window asks which way you would like the dates formatted, because some programs import dates in certain formats. To select the format required, press 1, 2, 3 or 4 and then select the separator using the /, -, or the space bar.

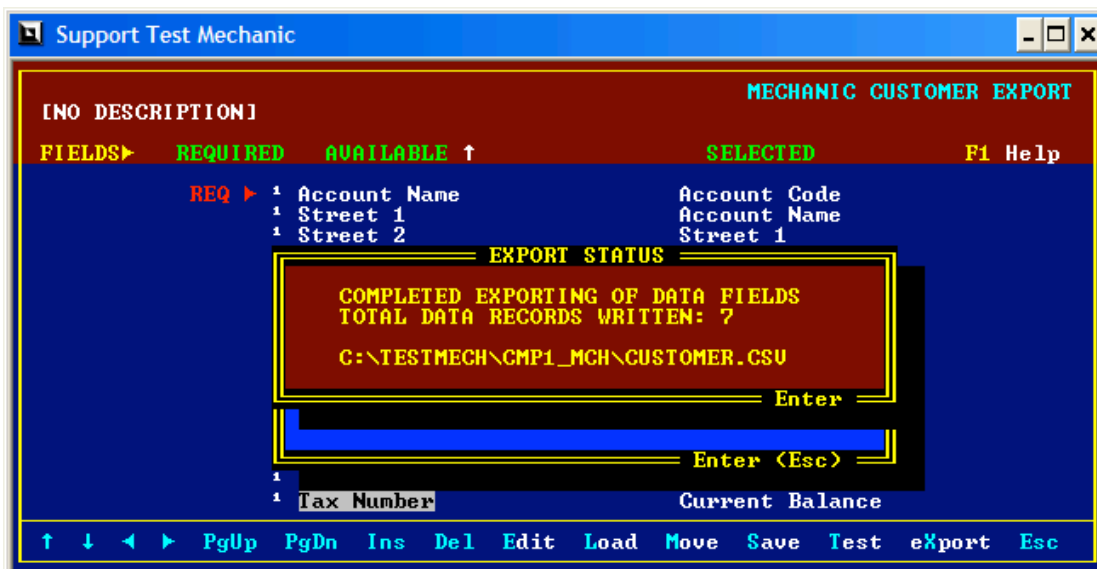
Your choice will be shown in the current date format field as you make your selection, when you are happy press enter to continue.



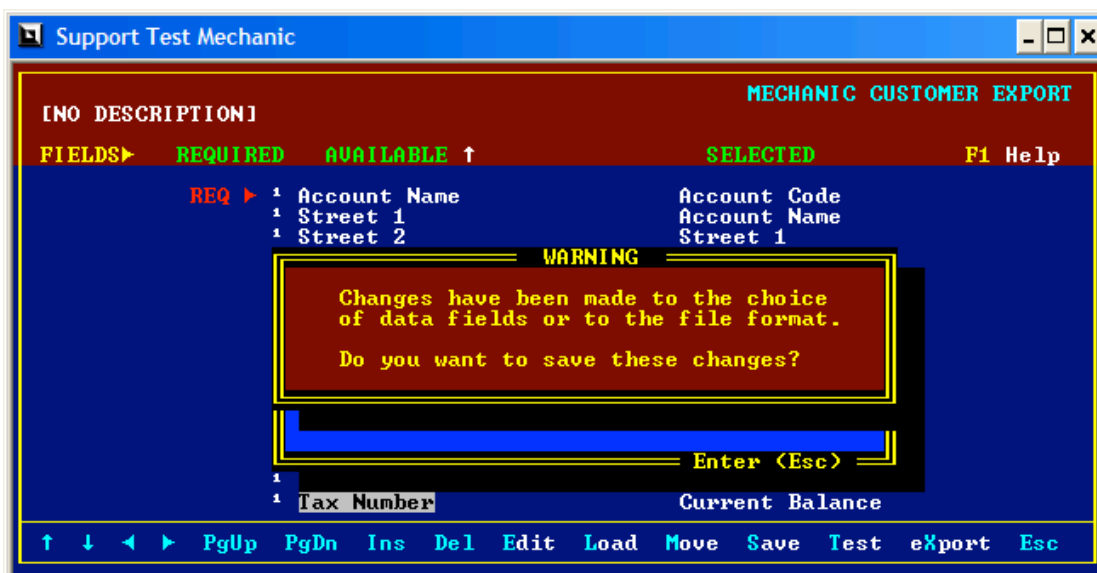
The next window will ask for a file name to be used to save the data.

By default it will place the file into the company directory with the ladder name.

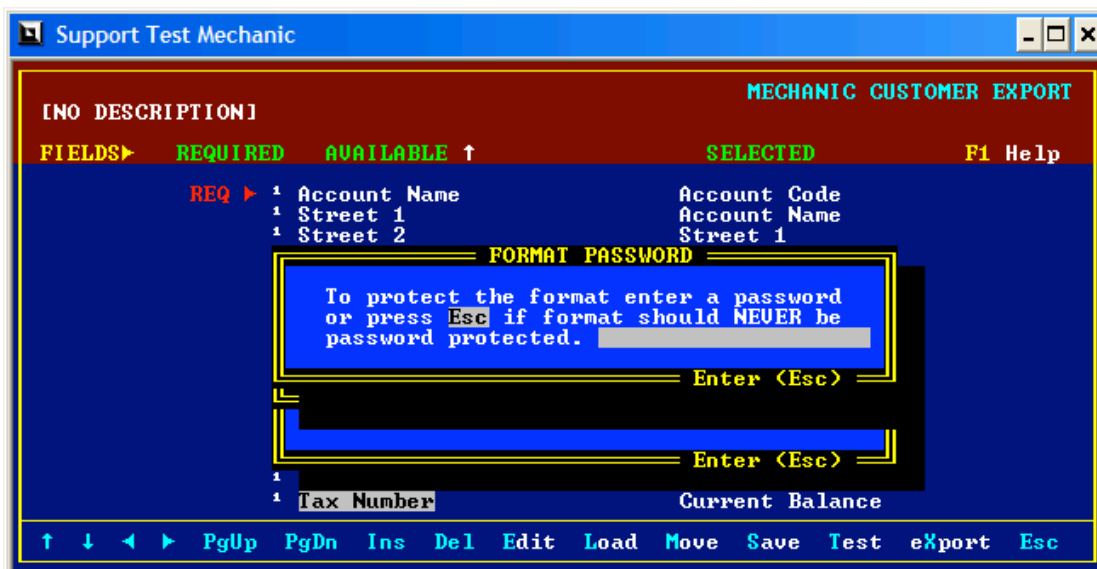
If you change this you must enter the filename and path in a DOS 8.3 format, this means that the file name must be no longer than eight characters and can not include spaces or non alphanumeric (!@#\$\$%^&\*) and must have a three character extension. Press enter to continue.



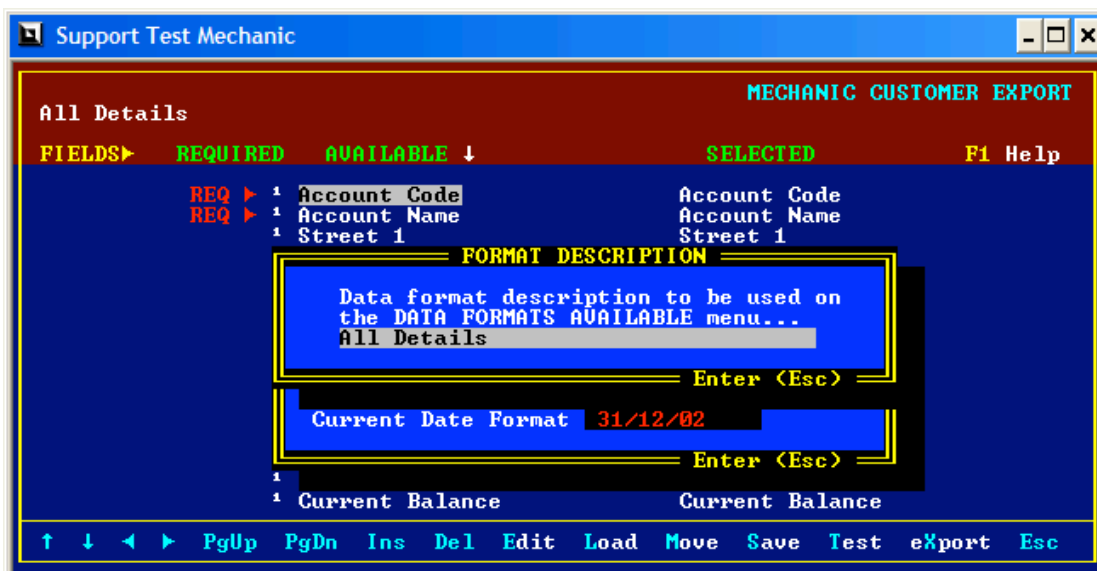
When the export has completed a window will show how many records were written and the file and path it was written to. Press enter to continue.



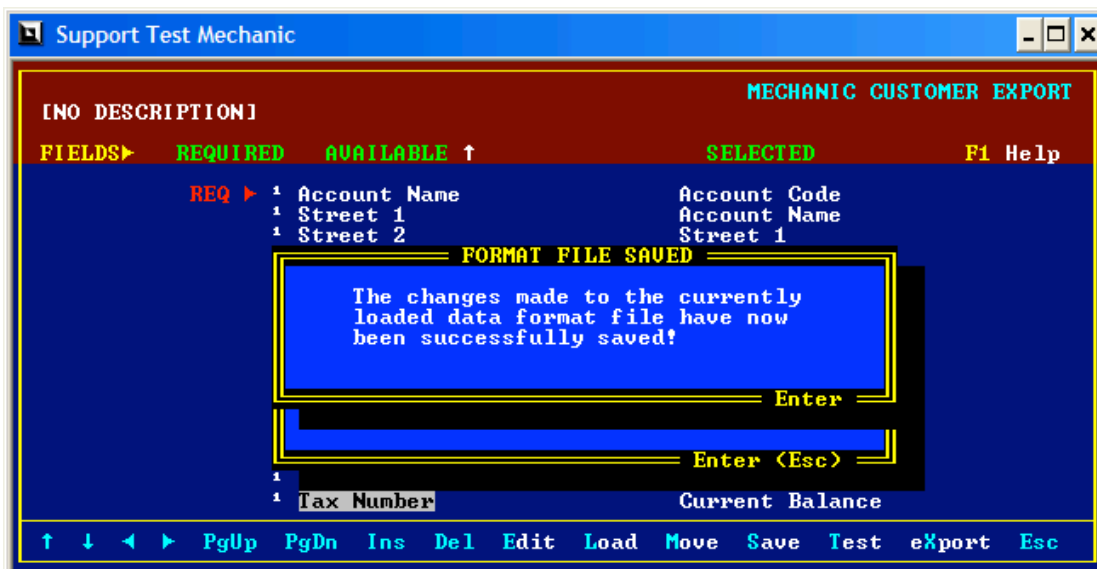
A window will prompt you saying that there have been changes to the export format and you will be asked whether or not you wish to save the new format. In this example, because it is a new format and we will want to use this format again, we will press Y to save.



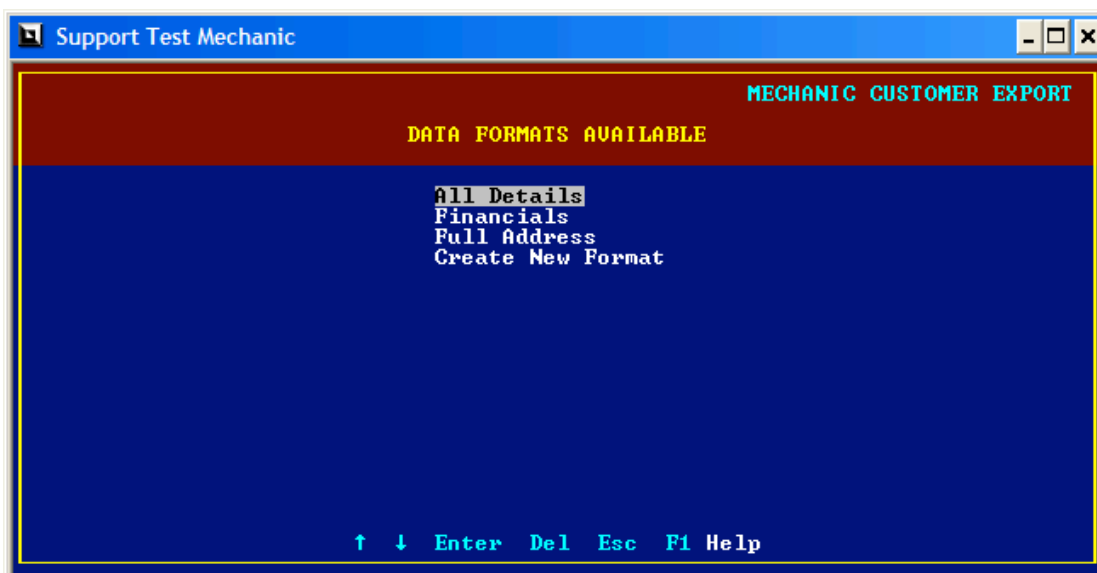
Saving the format can be password protected, if you do not want to password protect the format press the escape key, otherwise enter your password and press enter to continue.



The saved format requires a description, so you know what it is, type in a description and press enter to continue.



A window will show you that the format has been successfully saved, press enter to continue.



Your save data format will now be displayed on the main window ladder.

File Edit View Insert Format Tools Data Window Help										
Account Code										
	A	B	C	D	E	F	G	H	I	J
1	Account C	Account N	Street 1	Street 2	Suburb	State	Postcode	Phone 1	Phone 2	Contact
2	A&A	A & A Mot	8 Felix St		Grovedale	VIC	3216	524 38364		Adrian
3	A&G AUTO	A & G Aut	5 Roy St		Geelong	Vic	3220	522 25232		Glen L
4	ABERDEE	Aberdeen	406 Shannon Ave		Newtown	Vic	3220	52291849		
5	ABMETAL	A B Metal	31 Cowie St		North Geel	VIC	3215	527 88333		
6	ACE HIGH	Ace High	5254-256 High St		Belmont	Vic	3216	524 31153		Warre
7	ADAMOVI	Mr Goran Adamovic				Vic		0410 484830		
8	ADAMS W	Mr Warren Adams				Vic		52221862	0415 219489	
9	ADAMS W	William Ac	17 Grayling St		Belmont	Vic	3216	52431411	Fax 52442149	
10	ADLINGTON	Adlington	PO Box 574		Alice Sprin	NT	871	089 555566		David
11	AES	AES Auto	PO Box 864		GEELONG	VIC	3220	522 16283	Fax 522 5	Keith
12	AFFORD	Affordable	90 Fyans Street		Geelong	VIC	3220	5221 6599		Cliff A
13	AGUDO	Mr Jesus Agudo				Vic		0423 983714		
14	AIRD	Mr David A	19 Pavo St		Belmont	Vic	3216	52411169	014 455624	
15	AITKEN	Ms Aitken	20 Grubb Rd		Ocean Grc	VIC	3226	525 61697		
16	AITKEN B	Aitken Bro	146 High St		Terang	VIC	3264			
17	AITKEN H	Ms Helen	181 The Esplanade		Portarlingt	VIC	3223	52593853		
18	ALBANES	Mr Vince A	16 Sandlewood Crt		Grovedale	VIC	3216	524 11402		
19	ALBRECH	Mr E Albre	95 Monahans Rd		Gnarwarre	VIC	3221	52656180	018 525389	
20	ALCOA	Alice of A	Point Henry		Geelong	VIC	3220	522 90351		

Your exported data can now be opened in Microsoft Excel, Word, Access and other chosen third party programs for sorting, editing or mail merging.

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