Guide 11 – Exporting files

Overview

Atradius Atrium allows you to export a list of credit limits, non-payments cases and the related transactions which exist across your entire portfolio. You can also export a list of significant buyer rating movements from a Buyer rating communication alert when it is received. This is possible by generating an Excel (XLS) file which can be downloaded from Atrium and then applied to your own credit management system.
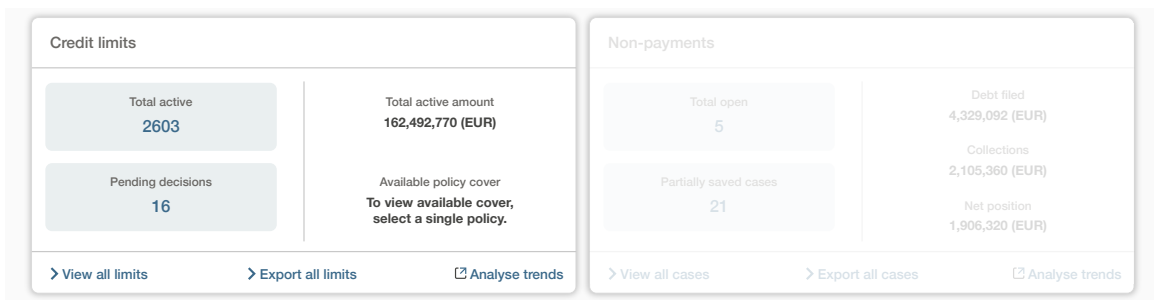
Exporting your credit limits

To export a list of all active limits or pending decisions for a selected policy or policy group, you can select the 'Export all limits' link from the Credit management page. This will take you to the Export files tab of the File import & export page, where your file will be processed and available to download once complete.

TIP

Credit limit overview

The Credit limits panel on the Credit management page allows you to access all your credit limits by clicking the 'View all limits' link. Alternatively, you can select the number of total active credit limits and pending decisions for your selected policy or policies. This will automatically take you to the Credit limits page, where the relevant details will be displayed as a list. You will also be able to download a list of your credit limits by selecting the 'Export all limits' link, where a file will be generated and presented under the Export files tab of the File Import and Export page.

Credit limits		Non-payments	
Total active **2603**	Total active amount **162,492,770 (EUR)**	Total open 5	Debt filed 4,329,092 (EUR)
			Collections 2,105,360 (EUR)
Pending decisions **16**	Available policy cover **To view available cover, select a single policy.**	Partially saved cases 21	Net position 1,906,320 (EUR)
› View all limits	› Export all limits	⬈ Analyse trends	› View all cases › Export all cases ⬈ Analyse trends

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TIP

Read Guide 2 – Credit management page to learn more about accessing the credit limits overview

You may not wish to include all details provided for your credit limits. If so, you can tailor which fields will appear in the export file on the Export preferences page. Once you have saved any changes made to your selections, only those export columns that have been checked will be shown when you download the file.

∧ Credit limit export columns

☑ Select / Deselect All

☑ Customer ID	☑ Legacy policy ID	☑ Customer name
☑ Customer reference	☑ Buyer ID	☑ Buyer name
☑ Buyer address	☑ Buyer city	☑ Buyer postcode
☑ Buyer area	☑ Buyer country name	☑ Buyer country code
☑ National reg number	☑ Buyer VAT number	☑ Dun & Bradstreet
☑ Credit reform	☑ Teikoku	☑ Fiscal code
☑ Trade sector	☑ Trade sector description	☑ Current buyer rating
☑ Current buyer rating class	☑ Current buyer rating date	☑ Previous buyer rating
☑ Previous buyer class	☑ Buyer rating change	☑ Credit Limit ID
☑ Policy currency name	☑ Policy currency code	☑ Credit limit application amount (policy currency)
☑ Total credit limit decision amount (policy currency)	☑ Credit limit decision amount 1 (policy currency)	☑ Credit limit decision amount 2 (policy currency)
☑ User currency name	☑ User currency code	☑ Credit limit application amount (user currency)
☑ Total credit limit decision amount (user currency)	☑ Credit limit decision amount 1 (user currency)	☑ Credit limit decision amount 2 (user currency)
☑ Application date	☑ Decision date	☑ Expiry date amount 1
☑ Expiry date amount 2	☑ Effect from date	☑ Withdrawal date
☑ Decision type	☑ Credit limit condition amount 1	☑ Credit limit condition amount 2
☑ Credit limit condition total amount	☑ Future events flag	☑ Non payments indicator

💡 **TIP** Read Guide 12 - Account settings to learn more about how to access your Export preferences

Exporting your non-payments cases

To export a list of all open or partially saved cases for a selected policy or policy group, you can select the 'Export all cases' link from the Credit management page. This will take you to the Export files tab of the File import & export page, where your file will be processed and available to download once complete.

> **TIP**
>
> **Non-payments overview**
> The Non-payments panel on the Credit management page allows you to access all your cases by clicking the 'View all cases' link. Alternatively, you can select the number of total open and partially saved cases for your selected policy or policies. This will automatically take you to the Non-payments page, where the relevant details will be displayed as a list.
>
> | Credit limits | | Non-payments | |
> |---|---|---|---|
> | Total active **2603** | Total active amount 162,492,770 (EUR) | Total open **5** | Debt filed 4,329,092 (EUR) |
> | Pending decisions **16** | Available policy cover To view available cover, select a single policy. | Partially saved cases **21** | Collections 2,105,360 (EUR) Net position 1,906,320 (EUR) |
> | > View all limits | > Export all limits ⬈ Analyse trends | > View all cases   > Export all cases | ⬈ Analyse trends |

> **TIP**
>
> Read Guide 2 – Credit management page to learn more about accessing the non-payments overview

You may want to export a list of transactions submitted for your non-payments cases. This can be done by selecting the 'Export case transactions' option on the Non-payments page. You can filter which cases and related transactions you want to export from the Non-payments page by using the advanced filter options.

Buyer name, Buyer ID, Customer reference or cover ID:

[   ]   ⌄ Advanced filters **9**

Case type

✔ Monitor	✔ Claim	✔ Collection
✔ Monitor & Claim	✔ Collection & Claim	✔ Monitor, Collection & Claim
✔ Monitor, Collection		

Case status

✔ Open	☐ Closed	✔ Partially Completed

From date

[📅]

To date

[📅]

Countries

[Start typing to filter countries]

Reset filters   **Apply Filters**

When clicking on the 'View case' link for a specific case on the Non-payments page, additional details for that case will be shown.

From the Case details page, you will also have the option to export a list of all transactions that exist for that case by selecting the 'Export case transactions' link, which can be found under the Financial details tab at the bottom of the page.

💡 TIP   Read Guide 8 - View list of Non-payments to learn more about accessing your Non-payments cases

💡 TIP   Read Guide 18 - Case details to learn more about viewing your case details

Exporting your buyer rating movements

You may receive communication alerts informing you of recent Buyer rating changes. If there are a number of significant rating movements across your portfolio, the alert will allow you to download a list of these buyers, as well as the direction of movement and date of the most recent change. Selecting the Export option will take you to the Exported files tab of the File import & export page, where your file will be processed and available to download once complete.

Accessing your requested export files

In order to view or download any export file generated, you will first need to go to the File import & export page in the left hand navigation menu.

Selecting the Exported files tab on the File import & export screen will show you a list of all export files requested by you. Any files in the process of being generated will be shown with a status of Progressing, with those appearing as Completed available for you to download by selecting the file name.

The 'Refresh' option will also update the list to show any newly completed exports. The File type will help you to identify what information was requested for the exported file, with the Row count confirming whether any information could not be exported correctly. In case of any errors, these will be clearly highlighted for you in the processed file. You can also set a date range to filter the list of Export files by Requested date, in order to find the one you are looking for more easily.
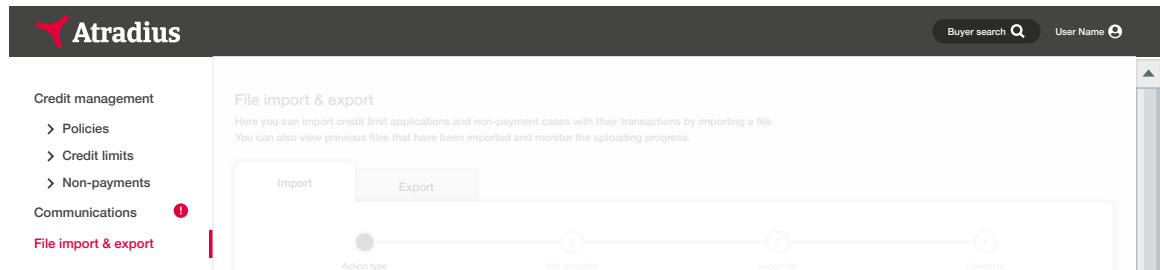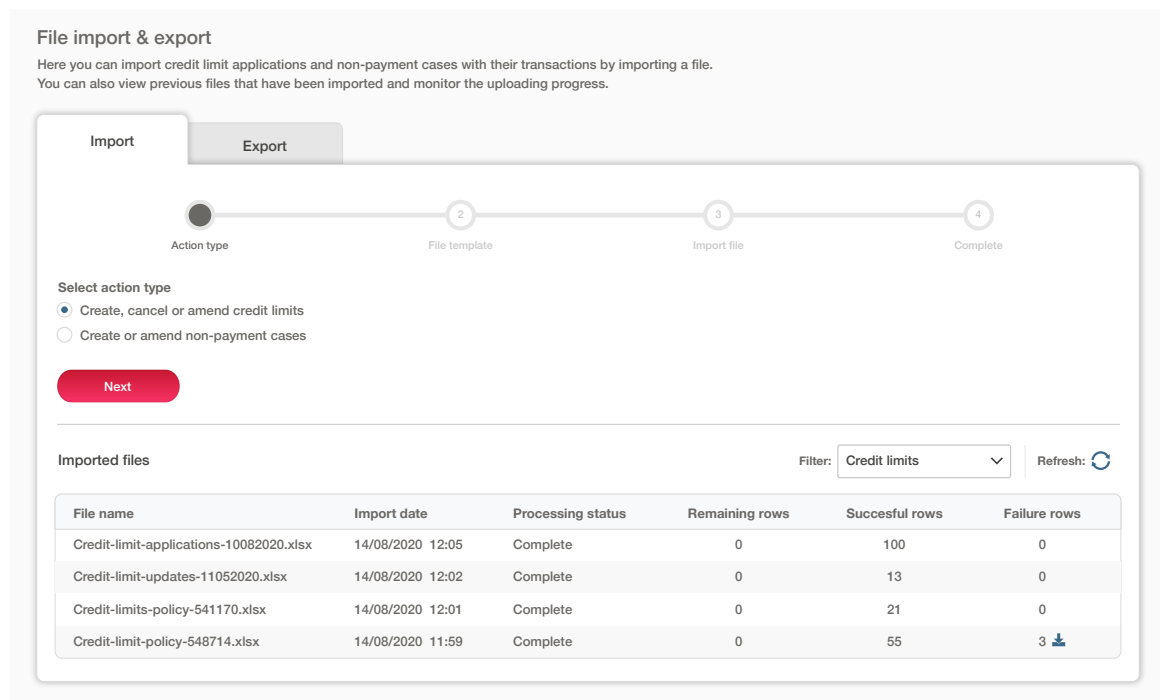
File import & export page

You can find the File import & export option in the left hand navigation menu. From here, you will be able to upload a list of credit limit applications or transactions for a non-payments case in bulk. You can also find the export files of credit limits or non-payments cases you requested to download.

On the File import & export page, you will see that there are two tabs to choose from; Import, which is active by default, and Exported files.

File import & export

Here you can import credit limit applications and non-payment cases with their transactions by importing a file.
You can also view previous files that have been imported and monitor the uploading progress.

	Import		Export	

Action type — File template — Import file — Complete

Select action type
- ● Create, cancel or amend credit limits
- ○ Create or amend non-payment cases

[Next]

Imported files   Filter: Credit limits   Refresh: ↻

File name	Import date	Processing status	Remaining rows	Succesful rows	Failure rows
Credit-limit-applications-10082020.xlsx	14/08/2020 12:05	Complete	0	100	0
Credit-limit-updates-11052020.xlsx	14/08/2020 12:02	Complete	0	13	0
Credit-limits-policy-541170.xlsx	14/08/2020 12:01	Complete	0	21	0
Credit-limit-policy-548714.xlsx	14/08/2020 11:59	Complete	0	55	3 ⬇

TIP

Read Guide 10 - Importing files to learn more about importing a list of cover and transactions to Atradius Atrium