

Exporting Reports

This chapter explains how to export schedules, cost estimates, and chase lists from MEplan. These reporting tools support client communication, internal review, and operational follow-ups.

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Schedule Exports

Exporting Schedules

Schedules can be exported individually or in bulk directly from the **Plan**.

To export a single schedule:

1. Navigate to the **Plan**
2. Select the **options menu (⋮)** on the relevant schedule line
3. Select **Reports > Export Schedule**

The schedule will be generated and downloaded to the user's local **Downloads** folder.

To export multiple schedules in one file:

1. Select the checkbox on the left of each schedule to be exported
2. Select the **options (⋮)** menu
3. Choose **Reports > Export Schedule**

All selected schedules will be exported into a single Excel workbook, with each schedule displayed on a separate worksheet.

Cost Estimate Exports

Exporting Cost Estimates

Cost Estimates can be generated for individual schedules or combined across multiple schedules or medium types.

To export a Cost Estimate for a single schedule or medium:

1. Select the **options menu (⋮)** on the relevant schedule line
2. Choose **Reports > Export Cost Estimate**
3. A Cost Estimate pop-up window will appear. Enter the required client contact details, such as:
 - Client name
 - Contact number
4. Select the required export format (**Excel** or **PDF**) and then select **Export**.

The Cost Estimate will be generated in portrait orientation and downloaded in the selected format.

Generating Cost Estimates for Multiple Mediums or Schedules

To combine multiple schedules or mediums into a single Cost Estimate:

1. Select the checkbox on the left of each schedule to be included
2. Select the **options menu (⋮)** menu on the plan
3. Choose **Reports > Export Cost Estimate**
4. Complete the required information and select **Export**.

The resulting Cost Estimate will include consolidated data from all selected schedules.

Cost Estimate Numbers, Revisions, and Customer PO Numbers

Cost Estimate numbers are generated automatically using a system number series and populate the **CE Number** field upon export.

Each time a Cost Estimate is re-exported, a new revision number is generated. Revisions are independent of the plan's status and increment sequentially with each export.

If a Customer Purchase Order (PO) number has been created and assigned to booking lines, the Customer PO number will automatically appear on the Cost Estimate when it is re-exported.

Chase List Exports

Exporting Chase Lists

Chase Lists are generated from the Plan Lines reporting area.

To export a Chase List:

1. Navigate to the plan and select the **Reporting** tab
2. Choose **Plan Lines**
3. Apply the **Master Medium** filter
4. For Magazines and Press, also apply the **Medium Type** filter
5. Select **Load Report** to retrieve the data.

Once the data is loaded:

1. Select the appropriate **Grid Layout** for the medium
2. Open the Plan Lines Report **options menu** (ⓘ) and select the required **Translation**
3. Open the blue **options menu** (ⓘ) menu again and select **Export (Excel)**

In the Export pop-up:

1. Select the appropriate **Template** for the chase list
2. Select **Export**

The Chase List will be generated and downloaded to the local **Downloads** folder.