

Meridian Extraction Guide â Generic CSV / Excel

Meridian â Onaro â Zero-Access Assessment pack

Generated for assessment use. Verified menu paths as of 2026-09-13.

Generic CSV / Excel â Data Extraction Guide

Zero-Access Assessment pack: export the files Meridian needs. Nothing connected, nothing installed.

Balanced journal entry CSV (any GL)

Verified as of 2026-09-13

Steps:

1. Export or create a sample balanced journal CSV from your GL/ERP with clear headers for account, debit, credit, date, memo, and department/dimension if used.
2. Alternatively, download a Meridian Generic CSV export from a locked chargeback run once available, and use that as the shape.
3. Upload your header sample into Meridianâs Export Profile wizard and map columns.

Resulting file: CSV/Excel with at least account, debit, credit (balanced), and preferably date, memo, department.

Gotchas:

- Keep accounts as text to preserve leading zeros.
- One of debit or credit per line; entry must zero-sum.

Source docs:

- Meridian GL Bridge â Integrations: <https://www.onaro.io/integrations>

Trial balance CSV

Verified as of 2026-09-13

Steps:

1. Export a trial balance or account balance file from your GL for the closed month.
2. Include account identifier and debit/credit or balance columns.
3. Upload into Meridianâs Import Profile wizard (artifact: trial balance).

Resulting file: CSV/Excel TB for the period.

Gotchas:

- Match the period end date to the Meridian chargeback month.

Source docs:

- Meridian GL Bridge â Integrations: <https://www.onaro.io/integrations>

Vendor / AP spend CSV

Verified as of 2026-09-13

Steps:

1. Export vendor bills or AP detail for the assessment period from your AP system or Excel AP

register.

2. Include vendor name, date, amount, and account/department when available.
3. Upload into Meridian's Import Profile wizard.

Resulting file: CSV/Excel vendor spend detail.

Gotchas:

- Do not include bank account or payment card numbers.

Source docs:

- Meridian GL Bridge Integrations: <https://www.onaro.io/integrations>

Chart of accounts / department list

Verified as of 2026-09-13

Steps:

1. Export your chart of accounts and any department/dimension lists used for allocation.
2. Upload into Meridian's Import Profile wizard.

Resulting file: CSV/Excel CoA and dimension lists.

Gotchas:

- Preserve leading zeros on account codes (text columns).

Source docs:

- Meridian GL Bridge Integrations: <https://www.onaro.io/integrations>

Budget CSV / Excel

Verified as of 2026-09-13

Steps:

1. Export the budget your company actually filed (period ^ department ^ amount is ideal).
2. Upload into Meridian's Import Profile wizard (artifact: budget).

Resulting file: CSV/Excel budget workbook.

Gotchas:

- Name the file with source and date for provenance (Meridian labels imported budgets).

Source docs:

- Meridian GL Bridge Integrations: <https://www.onaro.io/integrations>