

Exporting From QuickBooks to Excel

When working in QuickBooks, you may want to take advantage of the option to export report data to Excel. This functionality is available for most reports in QuickBooks. When you export report data to Excel, you can then use Excel to change, filter, or sort the exported data. This allows you to analyze the data or present it in a different way.

To export a report to Excel:

- Open the report in QuickBooks
- Click the **Excel** button (top of the report screen)
- Select "Create New Worksheet" from the drop-down list.
- On the next window that opens, click the radio buttons for "Create new worksheet" and "in new workbook".
- Click the Advanced button:
 - QuickBooks Options - The following are recommended to be checked:
 - ✓ Fonts
 - ✓ Colors
 - ✓ Row height
 - Excel Options - The following are recommended to be checked:
 - ✓ AutoFit
 - ✓ Freeze panes
 - ✓ Show Gridlines
 - ✓ Auto Outline (if you will be collapsing data in Excel)
 - Printing Options - The following are recommended to be checked:
 - ✓ Show report header: On printed report only
 - ✓ Repeat row labels on each page
- We recommend Un-checking:
 - Space between columns
 - Include QuickBooks Export Guide worksheet with helpful advice
- Click **OK** and then click the **Export** button

Once you have exported the data, you can save it in Excel format. We strongly recommend saving any Excel files that you export to your local computer. If you save files on the Server, they will be overwritten, and you will be unable to open them again using Excel. If you open existing Excel files on the Server, they will open with "Excel Viewer" - which has limited functionality.

See [Saving Files](#) on the Help screen at www.bookminders.com for additional instructions.

If you have any questions or problems using these instructions, please do not hesitate to contact your service representative or account Manager.