

Bookminders 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 **Export** button (top of the report screen)
- Click the Basic tab:
 - Select: Export QuickBooks report to: a new Excel workbook
 - Uncheck the box for: Include a new worksheet in the workbook that explains Excel worksheet linking
- On the Advanced tab:
 - Uncheck the box for: Space between columns (recommended, but optional)
- Click the **Export** button

Once you have exported the data, you can manipulate it in Excel and save it in Excel format. Bookminders' strongly recommends saving any Excel files you create on your local computer (see [Saving Files](#)). This is because your bookminder replaces the data in your Client folder each processing

If you have any questions or problems using these instructions, please do not hesitate to contact your bookminder or Client Relations Manager.