Export Manager

The Export Manager lets you select accounting transactions and export them to a spreadsheet that can be used by many popular accounting systems.

> **Note:** The Export Manager is designed to export transactions **once**, then flag them as exported, so they won't be exported again (because that could cause duplicates in your external accounting system).

You'll first need to go to the Set Up panel and look under Advanced Setup for Accounting > Preferences. Tick the box to allow "Export Data".

Then in the Accounting Panel, select Export Manager to see the window below.

Create New Export Options

- **For Transactions, you can choose**
    - All new transactions

      OR

    - New transactions between a specified date range

- **For Destination, you can choose (or create) a folder in which to save your export.**

  Click **Browse** to either select or create a destination folder on your computer.

> **Tip:** To create an export based on a more detailed selection (e.g. by Account Number, or Job Code), try the Account Inquiry screen instead. It has an **Export to Excel** feature, but doesn't flag transactions as exported, so you can still export them from here in the Export Manager.
>
> Account Inquiry is most useful for ad hoc queries about transactions (to produce valuable tracking information), while the Export Manager is for exporting transactions to your external accounting system, and making sure the same transactions are not exported twice.
>
> You would **not** take an ad hoc export from the Account Inquiry and import it into your external accounting system. (This could easily result in duplicates if you did it again later.)

Previous Exports Tab

If you need to re-create a previous export for any reason, you can do that here.

You can search and filter previous exports on these criteria:

- Yesterday
- Last 7 days
- Last 30 days
- Date Range

Select which exports you want to re-create by ticking the checkboxes on the left; you can select more than one. Press **Re-Export** to re-create the export files.