

Your first love — Microsoft® Excel®

For many small businesses, their first foray into accounting or keeping track of the money coming in and money going out was good ole Microsoft Excel. Once they realize just how much information they can insert, organize, and manage in Microsoft Excel it can quickly become the best friend of many small businesses, and it remains with them throughout the life of the business. At some point, many small businesses realize that they need a more automated accounting system and begin the search for an easy-to-use, cost-efficient software package, and *oh-by-the-way* — can I keep my Microsoft Excel?

With Peachtree Accounting, yes you can! Using Peachtree, small businesses can export¹ reports, budgets and lists into Microsoft Excel and manipulate the data² using all the usual suspects including filtering, sorting, freeze panes and automatic column filtering.

In just a few steps, reports created in Peachtree can be imported into Microsoft Excel:

1. Highlight a report in the **Select a Report or Form** window
2. Click the **Send To** button and select **Excel**
3. Select the appropriate options in the **Copy Report to Excel** window. There are several format options from which to choose, including file, Excel, or several report options.
4. When finished making selections, click **OK** and Peachtree will start the Microsoft Excel program, then copy the Peachtree report data into a blank worksheet. The worksheet name will be the same as the Peachtree report name.

¹When exporting data to Microsoft Excel you can choose whether the data will appear in Microsoft Excel in the original Peachtree format with columns and rows formatted as in the original Peachtree report or in raw data format with columns and rows unformatted regardless of the formatting in the original Peachtree report. Selecting raw data format makes sorting and filtering the report in Excel easier.

²Data exported from Peachtree includes the formulas for calculated values.