


How do I load transactions from Excel or CSV file?

I am using Excel and can convert it to CSV, but I have no idea of the layout I need. I usually pull information out of our claims system for checks that we have printed and then convert to an IIF file for accounting and our client. Our client is switching to QB Online, so I will need to know how to send them a file that can be imported. I can format the Excel file however necessary, but I can't find a template anywhere showing me what fields, headers, etc., that I need to be included, the order, and how they are formatted. Could you please send me an example of the layout or point me to a link? Our client is waiting for a test file, so any rush you could put on this is greatly appreciated. I will still be creating an IIF file for our accounting as we use QB Desktop. Thanks so much.

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info 

ANSWER

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Hi jwaters,

Thanks for visiting QuickBooks Community!

I'd be glad to help. There isn't specific format but before importing your Excel file, make sure:

- Your column headers are in the first row.
- Your spreadsheet has 1,000 rows or less.
- Your spreadsheet is on Sheet1.
- Your spreadsheet doesn't contain any formulas, charts or blank rows.
- Your spreadsheet doesn't contain any errors (like #REF!, #NAME?, #N/A or #VALUE!).
- Names don't contain colons (:) or quotation marks (").

See also: [Download a sample file to use as a template](#)

Let me know how it goes. Thanks in advance.

Was this answer helpful?



IntuitMaryF, Community Support Specialist

☆ Employee SuperUser ⌚ a year ago

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