



Welcome to Excel Transactions!

Here's a checklist to help you get started with Excel Transactions.

Welcome to Excel Transactions, we're so happy you're here! We want to help you learn how to make the most of our software so you can help your clients import their Excel/CSV file transactions into their QBO easily. So, we've put together a quick checklist to help you get to grips with Excel Transactions!

1 Explore Excel Transactions

- Check out our [how-to video](#) for a quick introduction to the software
- Log into your Excel Transactions account
- Click [Switch Company](#) button in dashboard and get into your client's company to take a look around!

2 Import Excel/CSV file using Excel Transactions

- From New Import screen, download our [sample template](#) and fill-in your batch transactions in it. Alternatively, you can upload your file as is, however, you need to provide us your file information in the subsequent mapping screen
- Gauge [Import settings](#) to fine tune your import data
- Review your import data in the grid screen and proceed to import
- Audit imported result from QBO and delete or update the imported transactions with [Delete/Modify](#) feature

3 Manage your clients

- When you log into Excel Transactions, you can easily see all the clients you have on Excel Transactions, and move between them by clicking [Switch Company view](#) in dashboard.
- Add another client by clicking 'Add Company' in dashboard screen.
- Add your client as a user to his QBO company in Excel Transactions by clicking the gear icon in top menu bar and selecting [Manage Users](#).
- Download imported reports from the grid screen by clicking [task icon](#) in top menu bar and selecting the recent import to share it with your clients for their archival.

4 Learn more

- Book a 1-1 demo of Excel Transactions with one of our product specialists. You'll get a link in an email from us!
- Visit Excel Transactions [help centre](#) to learn more!

HAVE A QUESTION?

You can get in touch with us straight from Excel Transactions using the chat icon in the bottom left hand corner. You can also contact us via email at support@saasant.com or by phone at 619 377 0977