

Export Data from Peachtree

The exporting process copies Peachtree data into a format that other programs can read.

1. From the File menu, choose Select Import/Export. Peachtree displays the [Select Import/Export](#) window.
2. Select the program area and then the template to use.
3. Select the Export button. Peachtree displays the window for the template you selected with the Filter tab in front.
4. Select the order in which you want fields to be exported from the Report Order drop-down list. For example, select Customer ID if you want records to be exported alphabetically by ID code.
5. If you are exporting a journal from one Peachtree Accounting company to another, select the date type from the Date drop-down list, and then specify the date range for which you want to export.
6. Select or change the Filter Range information. This lets you exclude and include particular information based on type and ranges.
7. When you are finished with the Filter tab, select the Fields tab.
8. Select the Show check box for each field you want to include in the export file.

The order in which they appear on this window is the order in which they will be exported. The Col # field defines the order. You can show or hide all fields by selecting Select All or Deselect All.

9. If any fields are not in the order you want to export them in, then highlight the first field you want to move, and select the Move button. Click the row just beneath where you want to move the field. This will place the field you moved just above where you clicked. The column numbers adjust accordingly.
10. Move any other fields necessary, and when you are finished, select the Options tab.

Click the arrow button to select or name the export file, if necessary. Peachtree supplies a default path and file name consisting of C:\, the original filename in Peachtree, and the extension .CSV. You can type over the default if you like and specify a path or the drive letter and directory to which you want to send the exported file.

For example, to export to your diskette drive A, and a directory \DATA, filename SALES.CSV, you will enter:

A:\DATA\SALES.CSV

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For a list of standard import/export templates, field names, and field requirements, click

11. Select the Include Headings check box if you want the names or headings of the data fields to export on the first line. This can be very useful when viewing the file in a spreadsheet program. If you don't select the Include Headings check box, only the actual data exports.
12. Select an option under If Export File Exists.
 - Select the first option if you want Peachtree to confirm the operation first before overwriting the file.
 - Select the second option if you want Peachtree Accounting to overwrite the file without prompting.
 - Select the third option if you want Peachtree Accounting to prompt for confirmation before appending the information to the existing file. Select the fourth option if you want Peachtree to append the information to the existing file without prompting for confirmation.
13. If you made changes to the fields and want to save it with a new name so it can be reused, select the Save button, and enter a template name.
14. To begin the export process, select OK.