Exporting Data

Quickbooks Online · https://mountainstream.co/docs/exporting-data-to-quickbooks/

If you have some data that exists only in Streamline but not in your QBO account, you can choose to export it to QBO. If data exists in both Streamline and QBO, check Pairing Data between Streamline and QBO.

Streamline allows exporting of various types of data, all of which will be explained separately in the following sections.

Before you export any type of data, make sure that you have completed the setup for connecting QBO and Streamline, explained HERE.

Exporting Credit Notes

For exporting to work correctly, you would have to pair Streamline tax rates with QBO tax rates.

- To export credit notes into QBO, on the main menu, select **Finance › Credit Notes › Published**.
- The rest of the exporting process works the same way as exporting invoices, which you can see in Exporting Invoices.

Exporting Vendors

The principle for exporting vendors is the same as exporting customers, which you can see in Exporting Customers.

Exporting Vendor Items

The principle for exporting vendor's items is the same as exporting items, which you can see in Exporting Items.

Get Started