



Import File Requirements

- File size limit: 2MB
- Supported file types: .xls, .xlsx, .csv

In the file you are importing, make sure:

- The data is available in the first sheet of the spreadsheet
- There are no additional titles or instructions.

Exporting your Chart of Accounts

Following are instructions for exporting your Chart of Accounts from several popular software accounting packages.

QuickBooks Desktop

1. Open **QuickBooks**.
2. Select **Reports > Lists > Account Listing**.
3. In the Account Listing, click **Excel** or **Export**, depending on the version you're using.
4. Select **Create New Worksheet > In a New Workbook > Export**.
5. Save the file to your desktop.

To turn on Account numbers in QuickBooks Desktop,

1. Click **Edit Menu**.
2. Select **Preferences**.
3. Select **Accounting**.
4. Under Company Preferences, enable **Use Account Numbers**.

Important: If the first sheet of the spreadsheet includes “QuickBooks Desktop Export Tips”, delete the sheet before importing it into RUN.

Xero

1. Open **Xero**.
2. Click **Settings**.
3. Choose **Chart of Accounts**.
4. Click **Export**.
5. In the File Download window, click **Save**.
6. Save the file to your desktop.

Exporting your Chart of Accounts (COA) from your Accounting Software to Import into RUN



Sage 50

1. Open **Sage 50**.
2. Select **Lists > Chart of Accounts**.
3. In the Account List, click **Send to > Excel** and click **OK**.
4. Copy to Excel is displayed. Select **Create a new Microsoft Excel workbook** and then click **OK**.
5. Save the file to your desktop.

Accounting CS/Creative Solutions

1. Open **Accounting CS**.
2. Click the **Accounting** section on the left and select **Print Reports**.
3. Click the **Accounting** folder, then double-click **Chart of Accounts – Detailed** to select it.
4. Click **Preview Selected**. The Chart of Accounts report is displayed.
5. Click the **Print** icon.
6. On the Print window, uncheck **Output to printer**.
7. Select Under Output to file” under File section > Check off box “Open file when complete” > Click OK.
8. Save the file to your desktop.