Exporting Job Expense – Bill Details

Export Information to Excel

Some *Job History Quick Menu* items enable users to export the job details to Excel for further analysis. The Job History Quick Menu can be used to export:

- **Job Expenses** – displays job expense details.
- **Job Billing** – displays billing summary information.

To *export job expenses* and/or *job billing details*, complete the following steps:

1. From the Quick Menu, select the required financial option.

   (**Note**: The selected details box will be displayed).

2. Select the Export to Excel button.

   (**Note**: A "Do you want to open or save <excel file name> from <location>" will be displayed).

3. Select the Open button to open the file now or the Save button to save the file now.

   (**Note**: The file can now be opened, modified and re-saved as an Excel file).

4. Click the OK button to exit.

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Other Available Information from the Quick Menu

Other Job History Quick Menu items display various expense and billing summaries for each completed job.

Use the Job History Quick Menu to view and/or print:

- **Expense Summary** – Displays details of job expenses.

- **Billing Summary** – Displays details of job billings.

- **Account Summary** – Displays an overall account summary.