



EXCEL ADD-IN

INTERFACES WITH

General Ledger

Sharing data between your Caselle financial applications and an Excel spreadsheet is simple with the help of the Excel Add-In. This tool is a time-saving must for any organization that needs an efficient way to share financial data between Caselle and Excel without having to manually enter the information in each.

Seamlessly export and import data between your Caselle financial software and Excel. Instead manually recording budget information in General Ledger, simply import Excel spreadsheets directly into Caselle based on account number, date, period, and amount. Set up customized parameters for importing spreadsheet information so you import only the data you need. You can also export live data from Caselle into Excel to ensure you are working with the most accurate information.

CAPABLE

- Provides a direct connection between Excel and Caselle financial software
- Monitors account balances in real time
- Imports Budget and Recurring Journal Entries into Caselle with standardized spreadsheets

EFFICIENT

- Eliminates the need for multiple data entries
- Delivers real-time numbers to an Excel spreadsheet
- Intuitive and easy to learn

FLEXIBLE

- Allows unlimited users
- Create customized authorized accounts
- Establish custom spreadsheets to view only the data you want

POWERFUL

- Real time access to live data
- Build custom financial statements, cashflow statements, budget worksheets, CAFR and GASB statements
- Create data graphs to present to your board or council