XL Docs

Automatically create customized Excel spreadsheets using data from Quickbase.

With XL Docs, you can create customized Excel spreadsheets from Quickbase data with a single click. Whether for reports, invoices, summaries, or other needs, design your template once and reuse it endlessly for effortless document generation from multiple tables, including sub-tables.

Key Benefits:

Your Spreadsheet, Your Format
Generate Excel files exactly the way you need with your own custom spreadsheet.

Easily Generate Complex Spreadsheets
Create anything from basic reports to complex spreadsheets with charts and pivot tables.
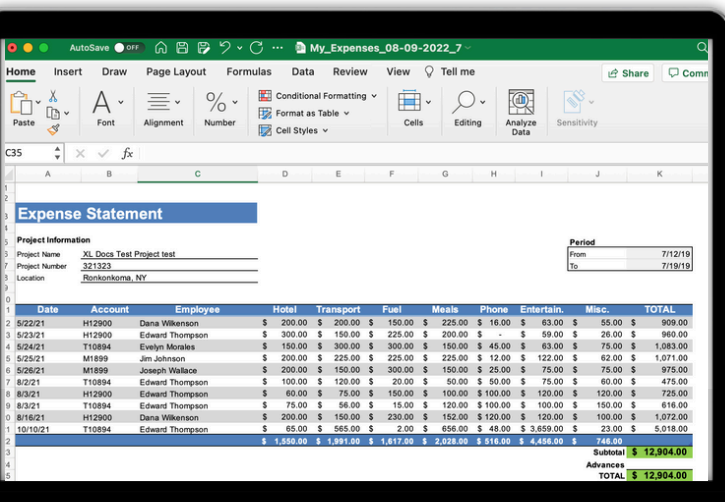
Create Multiple Spreadsheets at Once
Effortlessly generate multiple spreadsheets from a query report with a single click.

Product Features:

- Embed data from any Quickbase table into your custom Excel template.

- Export data to PDF, XLSX or even to CSV format.

- Save your spreadsheets to Amazon S3 or Dropbox.

- Create multi-tab Excel files from multiple Quickbase tables.

Commonly Paired Add-Ons:

- **JuicedSign:** Route your spreadsheets for electronic signatures.

- **Courier:** Email your spreadsheets to company stakeholders.

- **Package Builder:** Automatically consolidate various file types into one cohesive PDF.

Commonly Generated Documents:

- Invoices
- Order w/Line Items
- Sales Graph
- Proposals
- Billing Sheet
- Contracts
- Expense Sheets
- Inventory List

Scan to schedule a free consultation with our Customer Success Team and see how XL Docs fits your needs.