

QuickFS Add-in for Excel User Guide

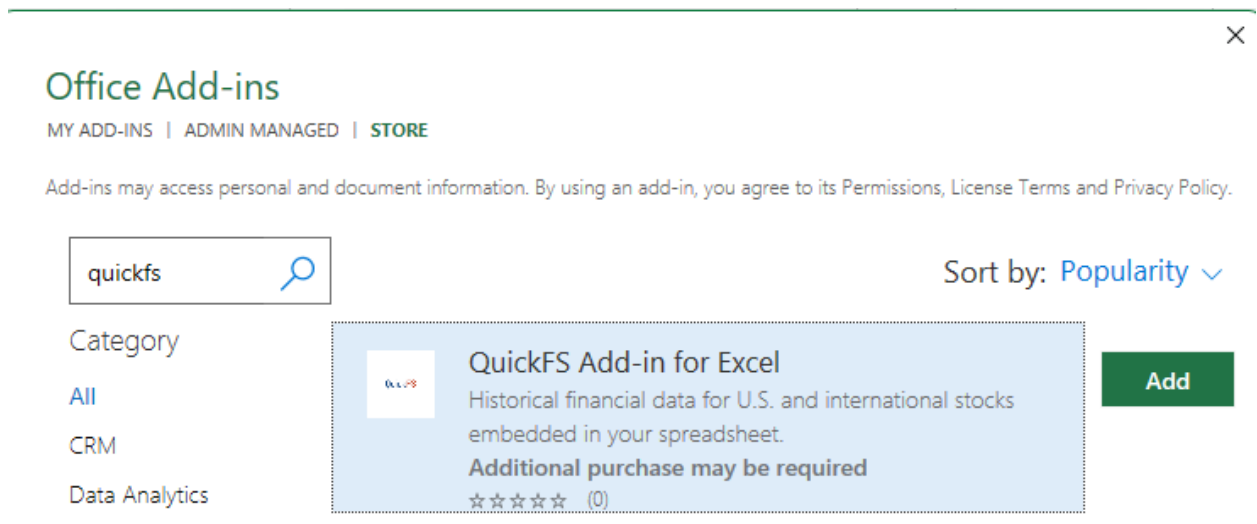
Compatibility Info:

This add-in intended for users with an active Microsoft 365 subscription or the perpetual license version of Office 2019 or later. It works on Excel for Mac, Windows, and Online (web browser). If you are using an older version of Excel, you need to use our [legacy add-in](#) instead.

Installation

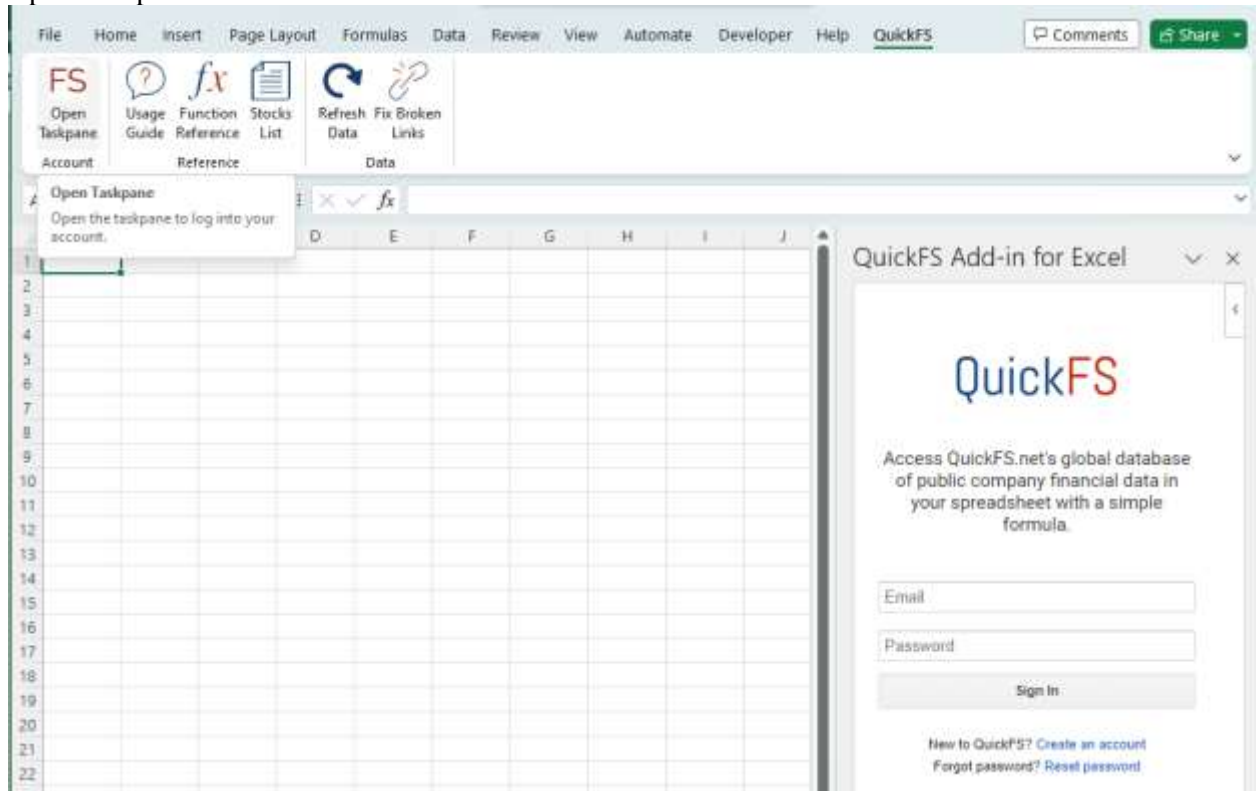
Note: If you've previously installed our Excel add-in, make sure you uninstall the legacy QuickFS Excel Add-in before you install the new Excel 365 Add-in. You can uninstall the legacy add-in by running the [legacy installation file](#) and clicking "Uninstall" at the prompt. Exit and re-open Excel before installing the new add-in.

1. In the Add-Ins dialog, navigate to the 'STORE' section and enter 'QuickFS' in the search bar.



2. Click the 'Add' button in the result section, and then click Continue once you have read the terms and privacy policy.

3. There should now be a QuickFS tab in the Excel ribbon. Navigate to the QuickFS tab and click Open Taskpane.



4. Enter your QuickFS account credentials and click the 'Sign in' button. You can now pull data into your spreadsheet using the =QFS() function.

Using the =QFS() function

In any cell in your spreadsheet, enter a formula that follows the format outlined below. **Note: Providing a period is not necessary for some metrics.**

```
=QFS( "symbol" , "metric" , "period" )
```

Symbol

QuickFS supports thousands of companies in its supported regions. A full list of symbols with their QuickFS Identifier can be [downloaded here](#).

If you need data for a company that we don't currently support, send us a note at support@quickfs.net and we'll do our best to add it to our database.

Metric

QuickFS aggregates and computes hundreds of metrics for each of the companies we support. Financial statement metrics like revenue may contain up to 20 years of historical data.

You can download the [QuickFS Add-in reference spreadsheet](#) to find the full list of supported metrics.

Period

Periods allow you to select the reporting interval and calendar range of data you'd like to retrieve.

For example, revenue is reported on a quarterly and annual basis, as determined by a company's fiscal calendar. The last 20 years of annual revenue figures is represented by the periods FY-19 to FY. Similarly, the last 20 quarters of reported quarterly revenue is represented by periods FQ-19 to FQ.

The following table summarizes supported period formats:

| Period | Description | Examples |
|--------|------------------------------|----------|
| FY | Annual reporting interval | FY, FY-3 |
| FQ | Quarterly reporting interval | FQ, FQ-2 |
| TTM | Last Four Quarters | TTM |

Example Queries

- Get the latest stock price for The Coca-Cola Company, ticker KO:US
=QFS("KO:US", "price")
- Get Apple Inc's (AAPL:US) revenue for the latest fiscal year (FY)
=QFS("AAPL:US", "revenue", "FY")
- Get Apple Inc's (AAPL:US) revenue for the fiscal year before last (FY-1)
=QFS("AAPL:US", "revenue", "FY-1")

Spreadsheet Templates

[Standard.xlsx](#)

Reference Links

[QuickFS Supported Stocks.xlsx](#)

[QuickFS add-in reference.xlsx](#)