

Exporting customers from Quick Books to Clip

This transfer will take the customers name, addresses and phone numbers from Quick Books and put them into Clip. The transfer program assumes that you entered the data into your Quick Books properly.

The following rules apply:

The “Customer” name (QB) will go into the Billing Name(Clip) exactly as entered. The exception is if you put the last name first and separated it with a comma. In this case Clip will reverse the name.

Example: (QB) name is “Zior Glenn” then in Clip it will be “Zior Glenn” for the billing name.

(QB) name is “Zior, Glenn” then in Clip it will be “Glenn Zior” for the billing name.

The second line in the “Bill To”(QB) will go to the billing address in Clip

The third line in the “Bill To”(QB) will go to the billing city, state, zip in Clip

The first line in the “Ship To” QB) will go to the property name in Clip

The second line in the “Ship To”(QB) will go to the property address in Clip

The third line in the “Ship To”(QB) will go to the property city, state and zip in Clip

If you do not have the “Ship To” filled out in Quick Books the Property info will be blank when transferred into Clip and you will have to type it in. It would be easier to go through Quick Books first and use the Copy function provided in the customers record.

If you have the address on the first line either in the “Ship To” or “Bill To” the data will not go to the correct place.

To export your customer list from Quick Books to CLIP

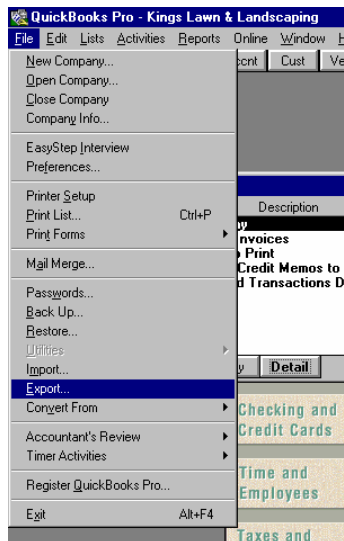
You can export your customer list from QuickBooks to CLIP. This will get all of your customer’s names and addresses into CLIP and speed up your data entry.

Step 1 – Export your customer list from QuickBooks

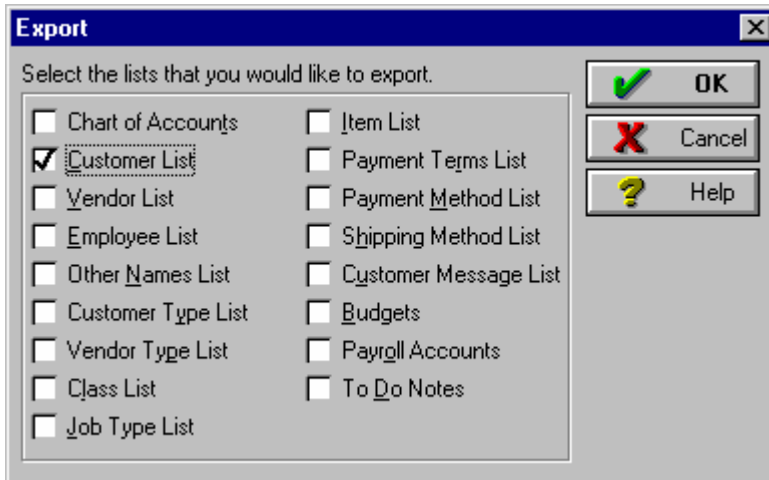
1. Open your QuickBooks company.

Press the File Menu

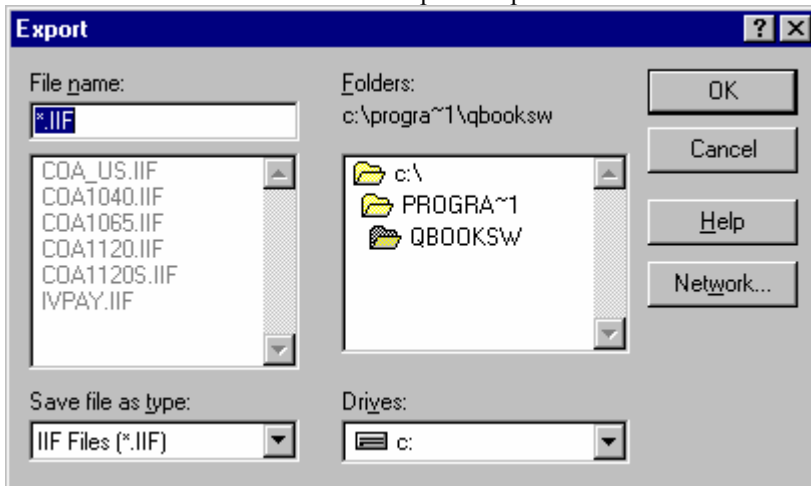
2.



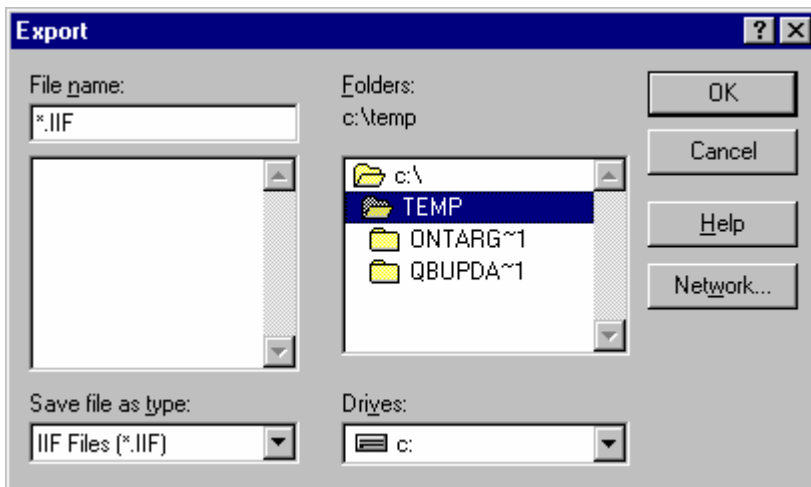
3. Choose the Customer List to Export:



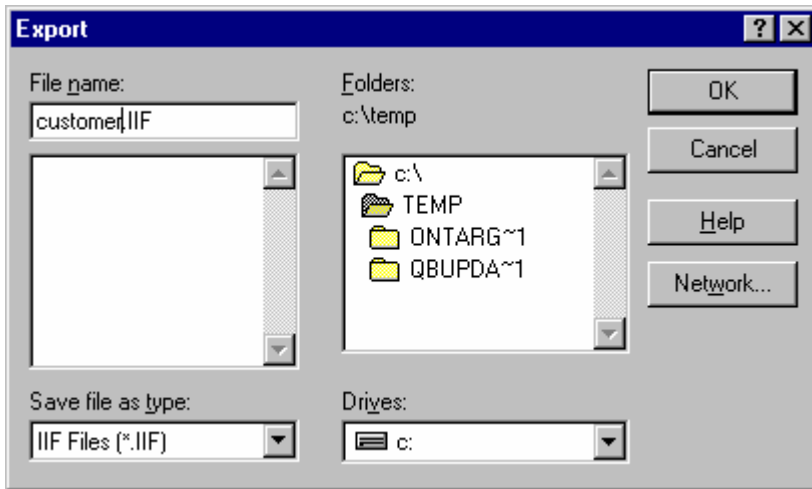
4. Press the OK button and choose a place to put the IIF file



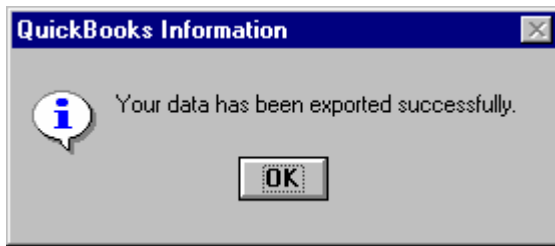
5. Choose a Temporary Directory



6. Name the file something that you will remember



7. Press the OK button to perform the export.

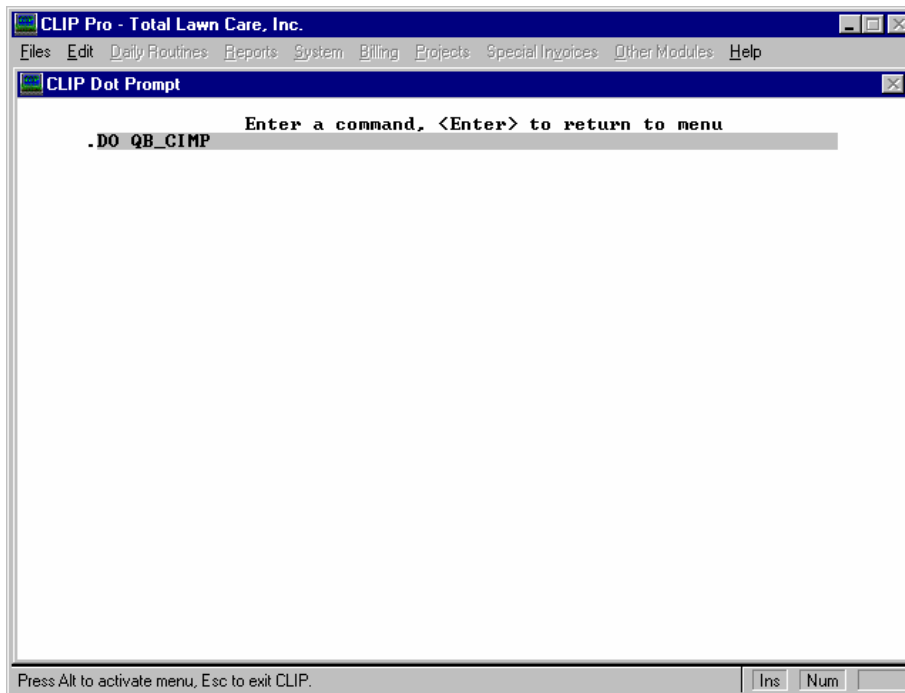


You will get this message:

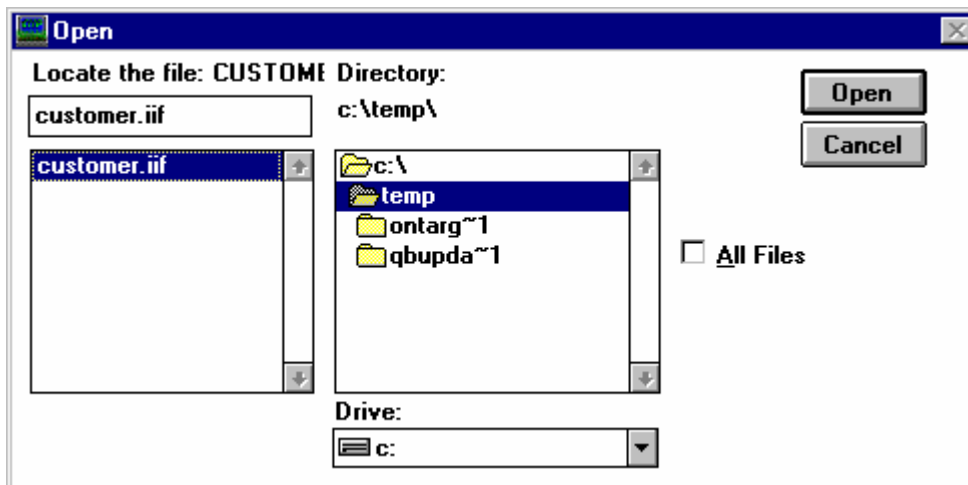
8. Close QuickBooks and open CLIP
9. Go to the Dot Prompt



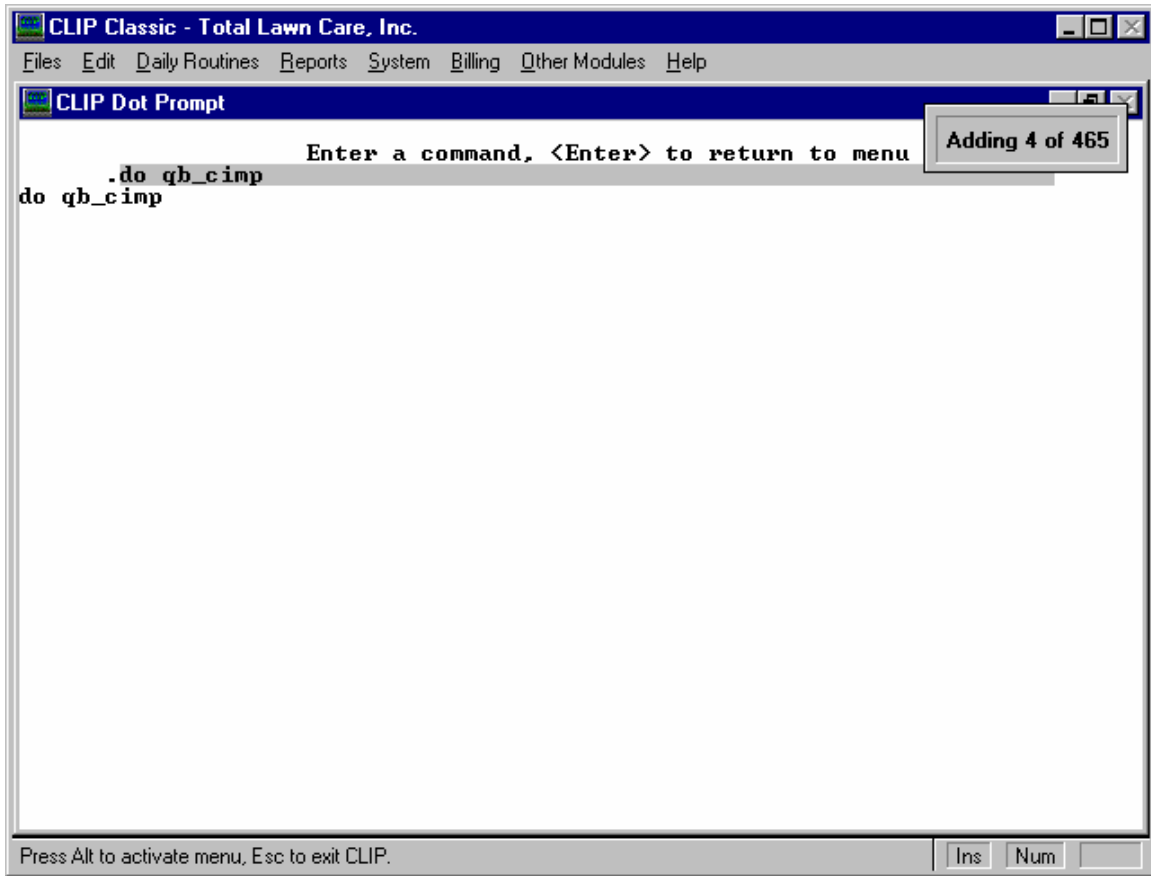
10. Type in the letters – DO QB_CIMP and press Enter



11. Find the file you created from QuickBooks



12. Press the Open Button to start the process.



The process can take a considerable amount of time. The updated numbers will be displayed in the upper right hand corner.

When it is finished, your customers will be in File Maintenance. We advise you to go through the customers one at a time to make sure that the information is accurate.