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Requirements:

- We support importing to 2014 QuickBooks Online Edition. **Note: We cannot guarantee that the older versions will work.*
- You need access level (50, 40, 30) to access the Dues & Billings Module.

Export Instructions

Step 1: Login to your ClubRunner 3.0 website. Click on the **Member Login** link found in the top right corner of the homepage.



Step 2: Next you will be taken to the Login screen. Here enter your **Login Name** and **Password**.

Enter your login information below:

Login Name

Password

Keep me logged in

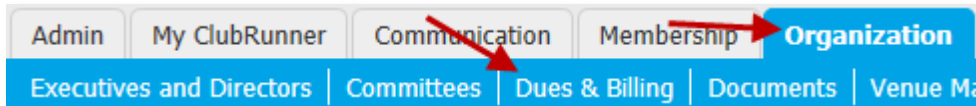
[Login »](#)

[New and existing users: retrieve login and/or reset password](#)

Step 3: Member Area. Now back on the homepage click on the **Member Area** link found in the top right corner.

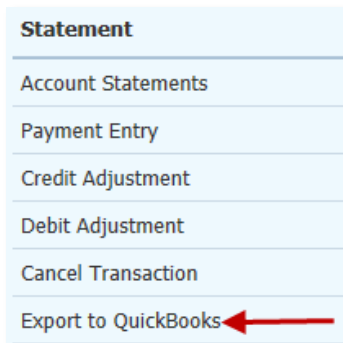


Step 4: On the Administration page, click on the **Organization (tab)...**Dues & Billing (link)

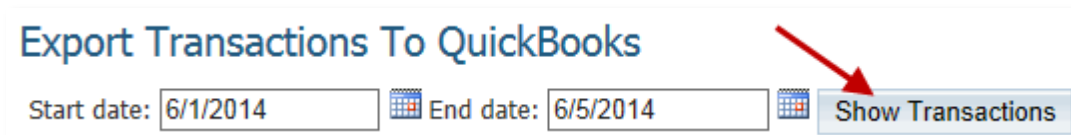


Step 5: On the left hand side under the Statement section click on the **Export to QuickBooks (link)**

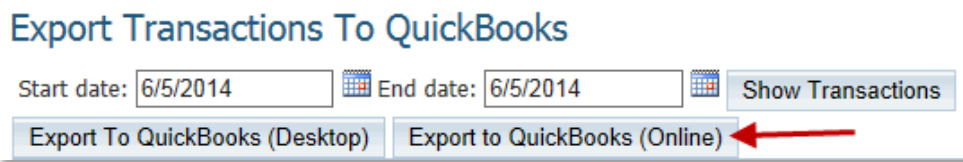
**Note: Make sure you already have your invoice generated! See "How to Generate an Invoice" section!*



Step 6: Next select the **date range** for the invoices you would like to export. Then click on the **Show Transactions** button.



Step 7: Now click on the **Export to QuickBooks (Online)** button to Export the information.

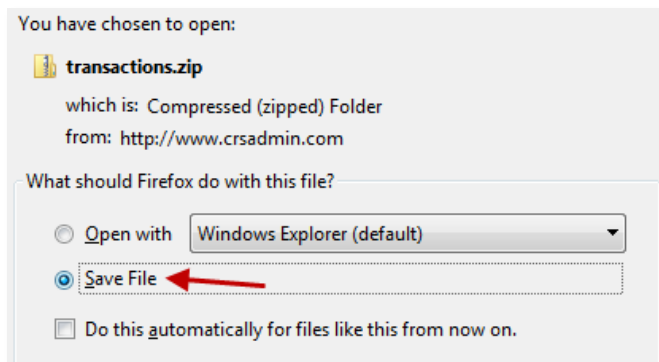


Step 8: The system will save the file as: **Transactions.zip** (by default). Save the file somewhere to your computer. ***Note: Make sure you know where you have saved the file!**

Internet Explorer:



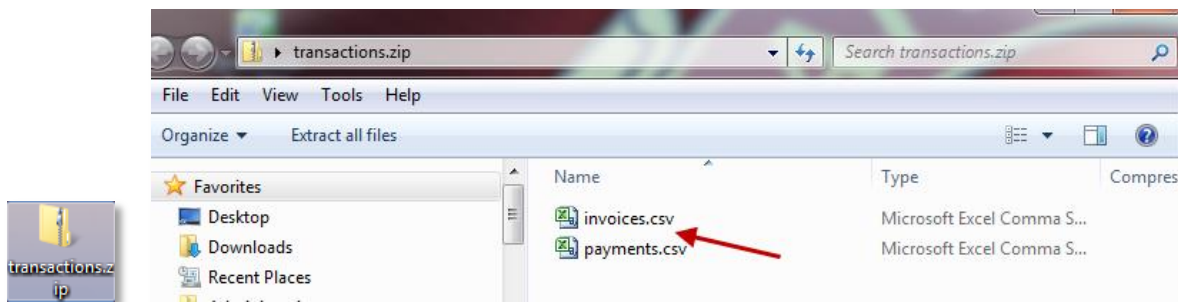
FireFox:



Google Chrome:



Step 9: Now that the .zip file is saved to your machine, open the .zip file and extract the two CSV files. ***Note: Make sure you know where you have extracted the files!**



Step 10: Next you will need: **Transactions Pro Importer**:

*Note: Click on the **Try It Now** button to try the free trial.*

<http://appcenter.intuit.com/transactionproimporter>

The screenshot shows the Intuit App Center interface. At the top, it says "Intuit App Center" and "Already have an Intuit Account? Sign in INTUIT." Below this is a navigation bar with "All Apps" and "Support". A search bar is on the left. The main content area shows the "Transaction Pro Importer" app by Baystate Consulting. It features a green and white logo, a 5-star rating with 91 reviews, and a "Try It Now" button. Below the app name, it says "Easily import transactions and lists into QuickBooks Online" and includes a "Watch a demo" button. On the right side, there is a box with pricing information: "Plans start at \$19.99/mo for unlimited imports. 30 day free trial available." and links for "Pricing details", "Terms and Conditions", and "Privacy Policy". At the bottom of this box, it says "This app works with:" followed by a checkmark and "QuickBooks Online". Red arrows point to the "Try It Now" button and the "QuickBooks Online" compatibility indicator.

Step 11: Next you must Authorize Transaction Pro Importer, click on the **Authorize** button.

The screenshot shows the authorization screen for Transaction Pro Importer. At the top, it says "Start your free Transaction Pro Importer trial". Below this is a horizontal bar with the QuickBooks logo (labeled "Ron Murrell Company") and the Transaction Pro Importer logo. Below the bar, it says "Authorize Intuit to securely share your data to Transaction Pro Importer." At the bottom, there is a yellow "Authorize" button and a "No, Thanks" link. A red arrow points to the "Authorize" button.

Step 12: Upload the CSV files one by one to transaction importer. Under the **Select A File to Upload** section click on the **Select File** button, select either CSV file then click on the **Upload File** button.

Select a File to Upload:

Import File Requirements

- Excel 2007-2010 (.xls, .xlsx, .xlsb)
- Excel 97-2003 (.xls)
- CSV Comma Separated Text (.csv, .txt)
- 2MB or 1,000 rows maximum size

No File Chosen X

Select File
Upload File

Step 13: Now you must select the **Import Type**. If you selected the **Invoices.CSV** file in the previous step then select **Invoices** from the dropdown list. If you selected **Payments.CSV** then select **Receive Payments** from the dropdown list.

Select Import Type:

Select Import Type: Invoices ▼ **You must select an import type to continue:**

Select Import Type:

Select Import Type: Receive Payments ▼ **You must select an import type to continue:**

Step 14: Now scroll down and find the **Data Mapped to QuickBooks Online** section. Click on the **Import** checkbox to select all members to import.

Data Mapped to QuickBooks Online


The grid below displays the data that will be imported into QuickBooks Online. Review this grid carefully as it represents the data that will be imported into QuickBooks online when the import button is clicked.

	RefNumber	Customer	TxnDate	DueDate	ShipDate	ShipMethodName	TrackingNum	SalesTerm	Location	BillAddrLine1	BillAddrLine2
<input checked="" type="checkbox"/>											
<input checked="" type="checkbox"/>	893949	ClubDemo-50 50	2014-06-05								
<input checked="" type="checkbox"/>	893955	Jane Doe	2014-06-05								
<input checked="" type="checkbox"/>	893961	Jason Lee Scott	2014-06-05								
<input checked="" type="checkbox"/>	893967	ClubDemo-70 70	2014-06-05								
<input checked="" type="checkbox"/>	893973	Robert Hansen	2014-06-05								
<input checked="" type="checkbox"/>	893979	Michael Jordon	2014-06-05								
<input checked="" type="checkbox"/>	893985	Lenard Hofstadter	2014-06-05								

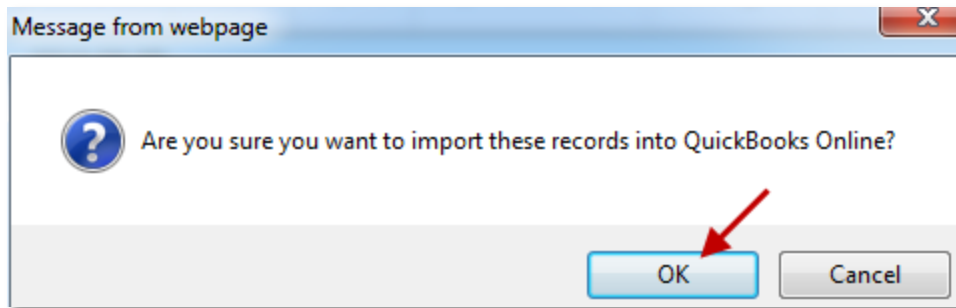
Step 15: Now click on the **Import** button.

NOTE: Clicking import below will change your data in QBO
Be sure the grid above has the data you wish to import before clicking the import button below.

Tip: Using sub-product/services in QuickBooks and your import file? Be sure to specify in this format Products:Widget A where Products is the the product/service and Widget A is the sub-product/service

Start Over Options **Import** 

Trial Plan is limited to 50 rows per import and 200 total transactions or lists.



... displays the data that will be imported into QuickBooks Online. Review this grid carefully as it represents the data that will be imported into QuickBooks Online. The import button is clicked.

RefNumber	Customer	TxnDate	DueDate	ShipDate	ShipMethodName	TrackingNum	SalesTerm	Location	BillAddrLine1	BillAddrLine2
893949	ClubDemo50 50	2014-06-05								
893955	Jane Doe	2014-06-05								

Do not close this window or refresh this page while communication is in progress with QuickBooks Online!

Step 16: After the import is finished you would see the **Status** of each member.

Status	RefNumber	Customer	Message
Imported	893949	ClubDemo50 50	Transaction Imported
Imported	893955	Jane Doe	Transaction Imported
Imported	893961	Jason Lee Scott	Transaction Imported
Imported	893967	ClubDemo70 70	Transaction Imported
Imported	893973	Robert Hansen	Transaction Imported
Imported	893979	Michael Jordon	Transaction Imported
Imported	893985	Lenard Hofstadter	Transaction Imported

Step 17: Now go back to **QuickBooks Online**, click on the **Customers (tab)...Customer Centre (link)** to see the imported information.

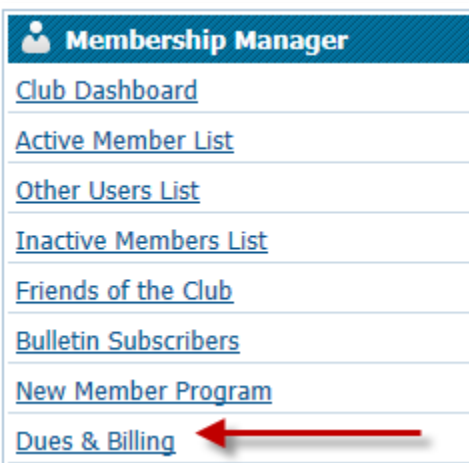
Name ^	Balance
Amy Farrah Fowler	135.00
Arnold Schwarzenegger	135.00
Betty Boop	135.00
Brad Pitt	135.00
Britney Spears	135.00
Brock Lesner	135.00
C. Robert Gilberg	135.00
Catherine Zeta Jones	135.00
Charlize Theron	135.00

How to Generate an Invoice

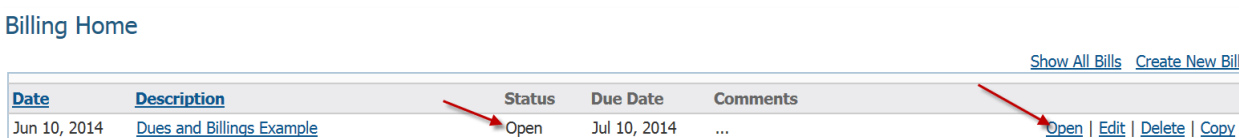
Below are the steps on how to generate an existing invoice:

Step 1: Login to your ClubRunner site.

Step 2: On the Administration page, under the **Membership Manager** Section click on the **Dues & Billings** (link).



Step 3: Open an existing Bill. Find the bill that you want to generate then click on the **Open** (link). *Note: If the Status is "Open" then the bill has NOT been generated!*



Step 4: Now click on the **Generate Invoices** button. This will generate the invoices which will allow you to either print or email them to your club. Please note that once you generate the invoices, you will **NOT** be able to modify the invoices.

3) Generate Invoices

Once you generate the invoices, you will be able to print and email them to members. Please note that once you generate the invoices, you will **NOT** be able to modify the invoices.

Generate Invoices