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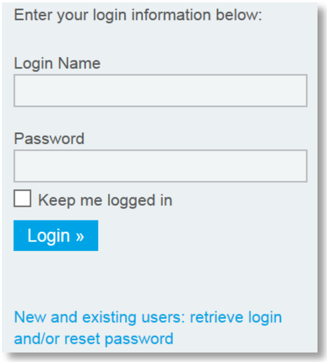
Requirements:

- 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 you **Login Name** and **Password**.

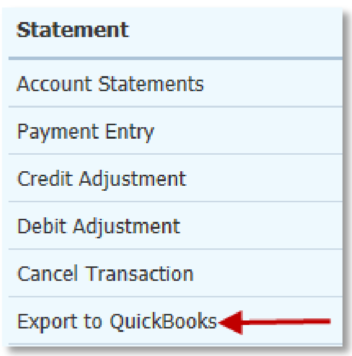


Step 3: Member Area. Now back on the homepage click on the **Member Area** link found in the top right corner.

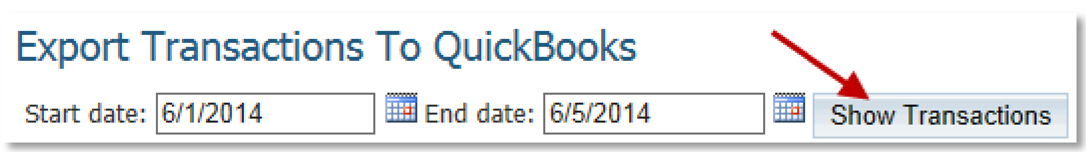
Step 4: On the Administration page, click on the **Organization (tab)…Dues & Billing (link)**

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

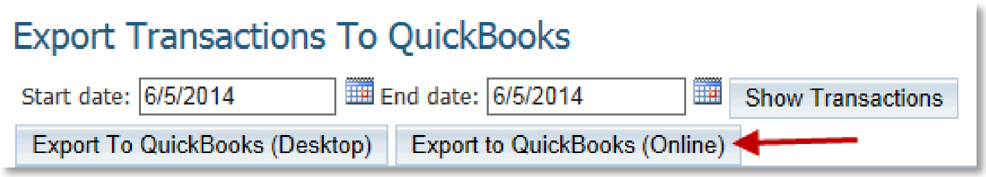
**Note: Make sure you already have your invoice generated! See "How to Generate an Invoice" section!*



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

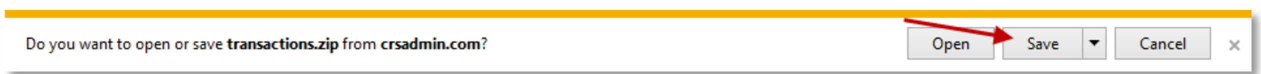


Step 7: Now click on the **Export to QuickBooks (Online)** button to Export the information.

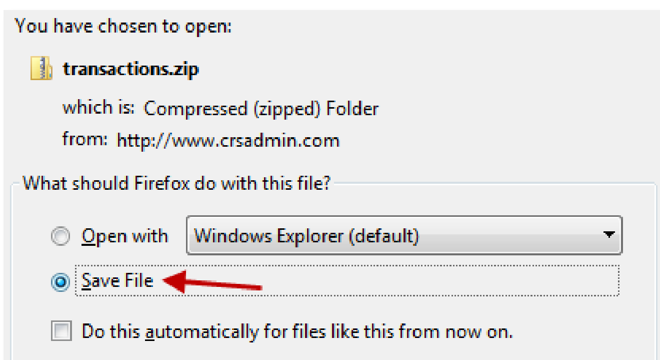


Step 8: The system will save the file as: **Transactions.zip** (by default). Save the file somewhere to your computer. ****Note: Make sure you know where you have saved the file!***

Internet Explorer:

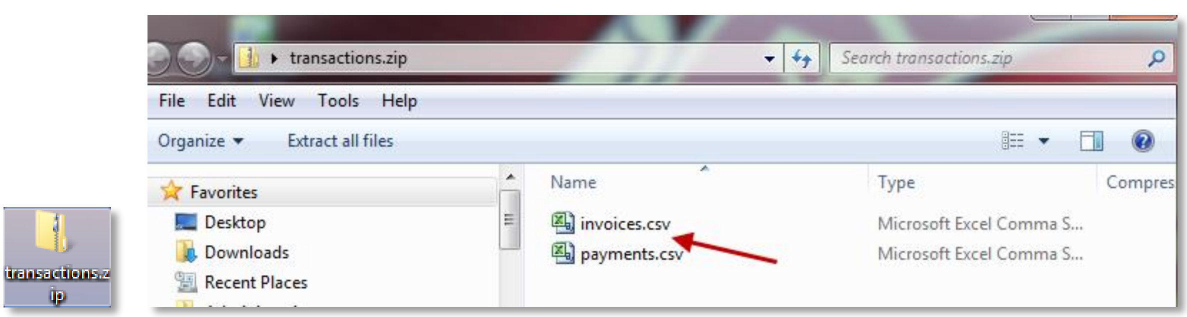


FireFox:



Google Chrome:

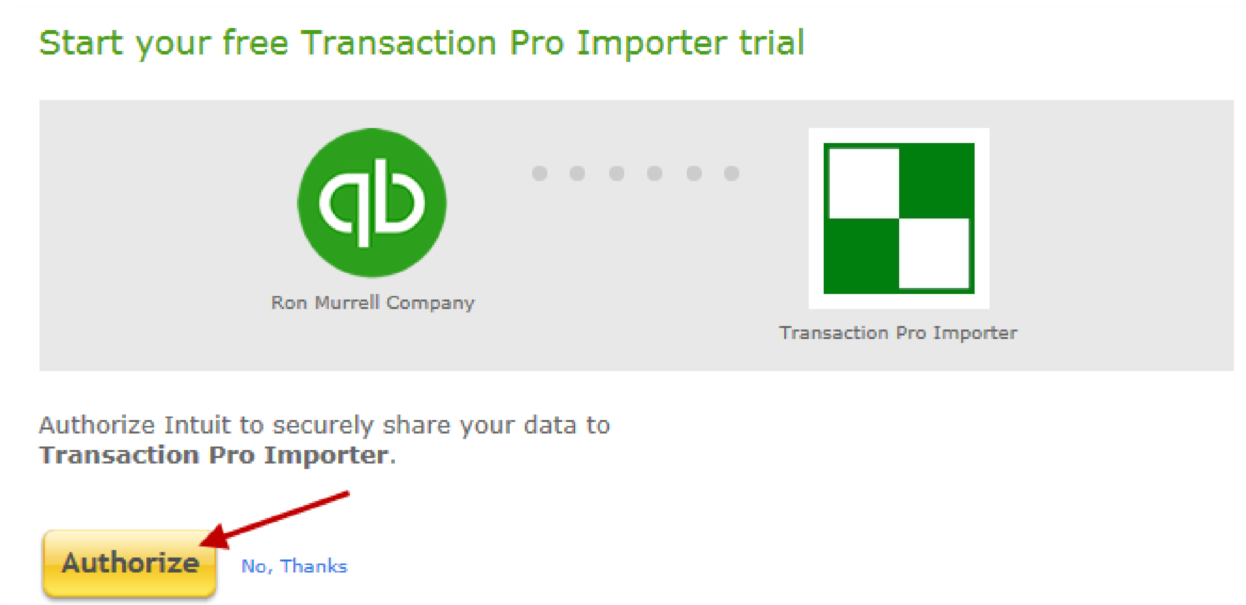
Step 9: Now that the .zip file is saved to your machine, open the .zip file and extract the two CSV files. ****Note: Make sure you know where you have extracted the files!***



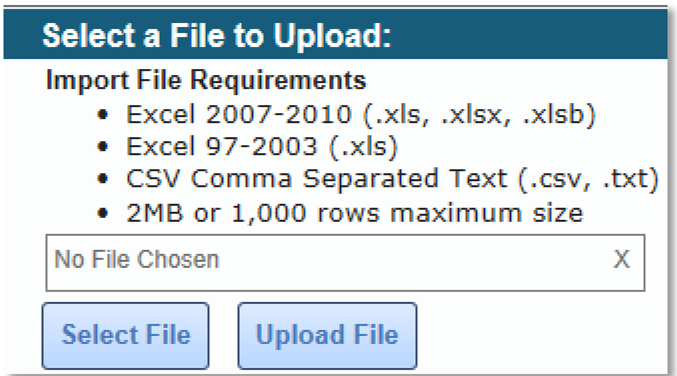
Step 10: Next you will need: **Transactions Pro Importer**:

*Note: Click on the **Try It Now** button to try the free trial.*
http://appcenter.intuit.com/transactionproimporter

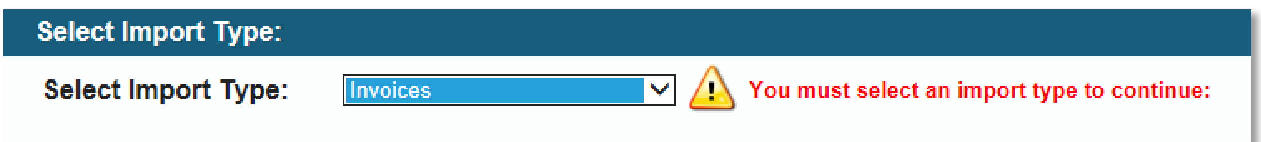
Step 11: Next you must Authorize Transaction Pro Importer, click on the **Authorize** button.

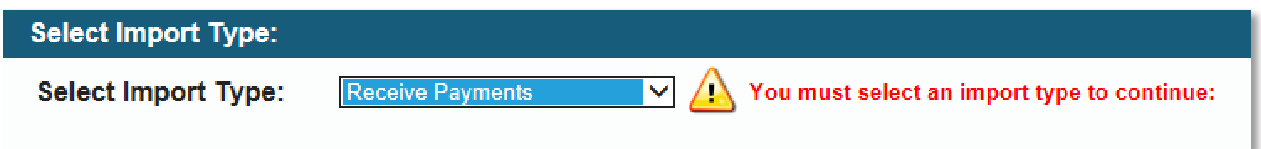


Step 12: Upload the CSV files one by one to transaction importer. Under the **Select A File to Upload** section click on the **Select File** button, select either CSV file then click on the **Upload File** button.

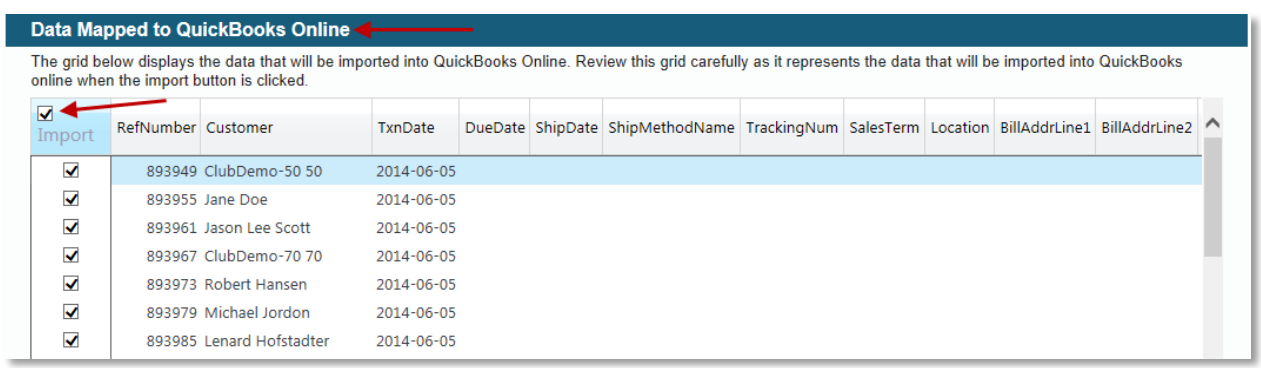


Step 13: Now you must select the **Import Type**. If you selected the **Invoices.CSV** file in the previous step then select **Invoices** from the dropdown list. If you selected **Payments.CSV** then select **Receive Payments** from the dropdown list.

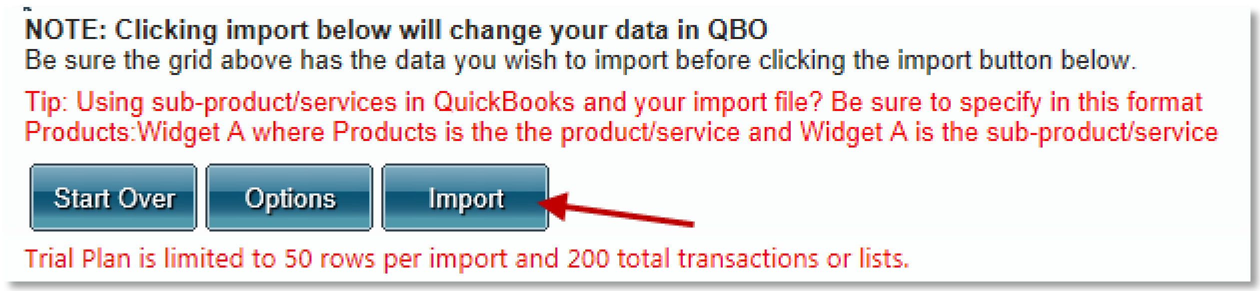


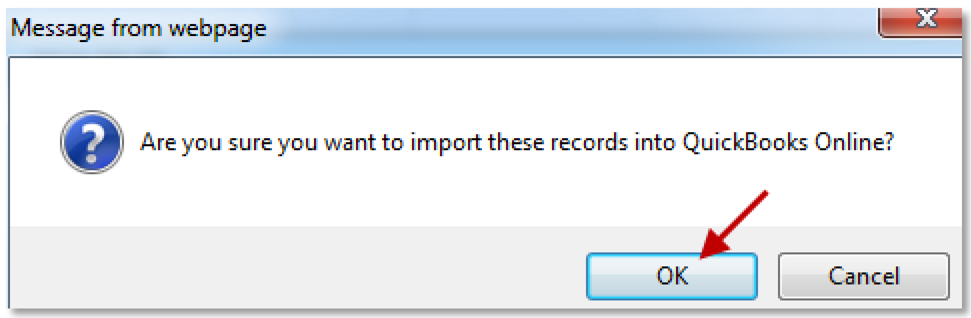


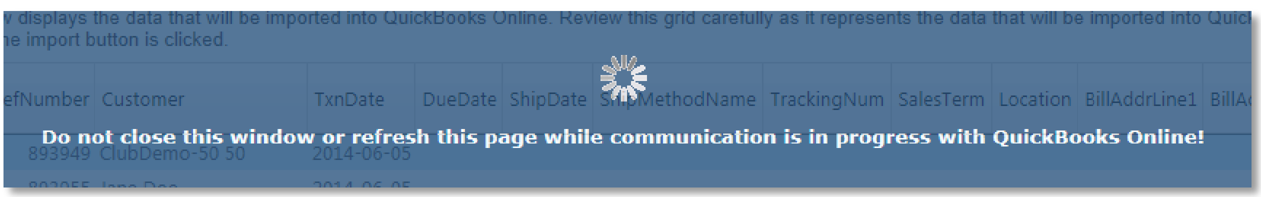
Step 14: Now scroll down and find the **Data Mapped to QuickBooks Online** section. Click on the **Import checkbox** to select all members to import.



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







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.

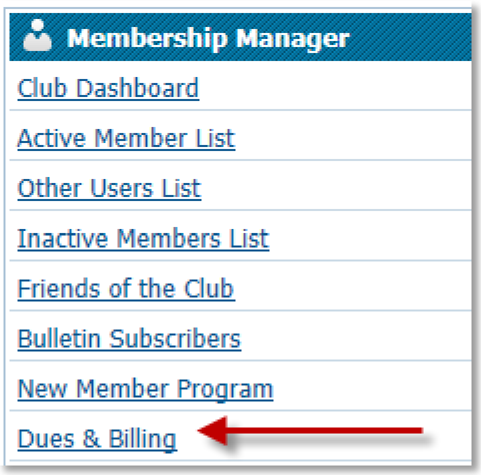
Name ▲	Balance
Amy Farrah Fowler	135.00
Arnold Schwarzenegger	135.00
Betty Boop	135.00
Brad Pitt	135.00
Britney Spears	135.00
Brock Lesner	135.00
C. Robert Gilberg	135.00
Catherine Zeta Jones	135.00
Charlize Theron	135.00

How to Generate an Invoice

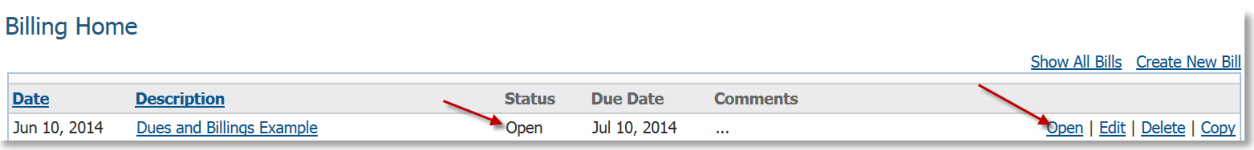
Below are the steps on how to generate an existing invoice:

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.