

Quickbooks Pro 2001

File

Utilities

Export Addresses

Select All Customers 1jobs (A press to text files)

Save in: Desktop

Filename: Addresses

Then the first time you open the computer it will show this message:

This file is too large for notepad to open.

Would you like to use WordPad to read this File?

Yes No

Choose yes

Add the File as an attachment to the email.

Mike,

Are you trying to get a list out of Wintac? If so, you can go to the upper left corner and select export. This will export your list to an excel spread sheet. In order to view this spread sheet, you have to go to the drive that Wintac is stored in, in my case it is the local C drive. Double click on Wintac and then scroll down for an icon which says customer. Double click on this icon to open the list or what I do is copy it to my documents. If you do any altering of the list it is best to hae it in my documents. In order to pull the customers from the last 4 years you would hae to find the column in the spreadsheet that says LIDATE. This is the date of the last invoice. A lot of time I will delete all columns that I do not need for my mailing list - keeping the LIDATE. Then sort the list by the LIDATE. You can then scroll down the list and delete anyone who is beyond the date you are looking for. I hope this is what you were looking for...actually hae exported the customer list into an access database because I could not get Wintac to do what I wanted it to do. Now I can manipulate the data easier. The only down side is that when a new customer is added to Wintac, you hae to add them to the access database. Good luck in your quest!

Tina Wiehert

Carew Heating & A/C

1104 S Tenth St

Watertown, WI 53094

920-262-2288

HYPERLINK "mailto:tina@carewheating.net"

Mike,

Sorry about the delay in sending this information to you. Below are the steps to retrieve this information. <<CUSTOMERLIST.xls>>

- 1) 1-Run CMS
- 2) 4-Accounts Receivable
- 3) 7 Print Customer list
- 4) 2-generate mail merge file
- 5) when open leave as is and hit esc then enter
- 6) go to start menu and select find option
- 7) type *.wdb click find
- 8) should find file called custdad.wdb
- 9) resave and rename in excel

Thank you for your assistance in collecting this information. But I would like to stress if you send anyone else to Mr. Holmes for help please let them know of the fee up front, as he does not.

Thank you,

Melissa Collins

Muetzel Plumbing

From: JMS Denise [<mailto:jmsdenise@cityofbryan.net>]

Sent: Monday, January 10, 2011 1:13 PM

To: Mike Morosi

Subject: windows 7 and shaffers software

Mike,

Jim asked me to send you the process I did to send the customer files.

This is good for Shaffers software using Windows 7

Acct rec- Customer Master- Marketing- customer marketing.

Make choices at this screen.

Then-

Refresh List- Select all- Export CSV- checked- then export.

Name the file in my documents and hit save.

Ready to e-mail- as an attachment.

I hope this helps- if you need anything else –please call me or drop me an e-mail.

Denise

JMS

419-636-3739

jmsdenise@cityofbryan.net