Balance to Buy™ Pro Tip – Customer Export Button

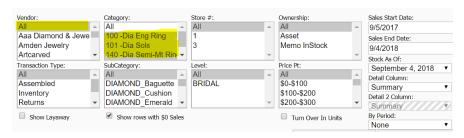
Objective: I need to create a customer contact list

Solution: Customer Export Button

Have you ever needed a customer contact list created for an event? A list that already had the Customer's Phone #, Email Address and Mailing address in one place. An excel spread sheet that you can send to a mailing company and have post cards sent to a select group of customers? Our **Customer Export** Button will do just that for you in just a few seconds

- Step 1: Determine what your project is, i.e., A vendor trunk show, diamond event, wedding band event, Etc.
- Step 2: In the Drop Down Menu for the Summery-Detail tab, select a vendor or a category report
- **Step 3**: In the filter boxes you have a wide range options to choose from, depending on your project. You can choose a specific vendor, multiple vendors or a select group of categories.

Example: You have a wedding ring event coming up. You would select all Vendors and choose categories such as Engagement Ring, Solitaires, Semi Mounts, Etc.



Apply Filter

Step 4: Once the report refreshes, select the Customer Export button on the navigation Bar.



A report will populate in an excel spreadsheet. This report will have the information that you currently have in your POS system.

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custName	custId 💌	CustAddr1 ▼	CustAddr2 💌	CustCity 💌	CustState 💌	custZip 💌	CustEmail 💌	CustPhone ▼
cust 1	1234	8834 Petz		City	MO	65800		555-720-0481
cust 2	1235	3543 Gratiot Ave		City	MO	65800	cust2@gmail.com	555-670-9099
cust 3	1236	2020 Hull Rd		City	MO	65800	cust3@gmail.com	555 240-7690
cust 4	1237	9780 Dolan Rd		City	MO	65800	cust4@gmail.com	555 488-6915
cust 5	1238	5211 Lakeshore Rd		City	MO	65800	cust5@gmail.com	555 334-6172
cust 6	1239	3968 Creekside Dr		City	MO	65800	cust6@aol.com	555 662-4505
cust 7	1240	38 Eldred St		City	MO	65800	cust7@gmail.com	555 753-1034
cust 8	1241	120 W Nichol Rd		City	MO	65800		
cust 9	1242	8764 Goetze		City	MO	65800	cust9@gmail.com	555- 550-9693
cust 10	1243	1953 Stapleton		City	MO	65800	cust@gmail.com	

Contact your Balance to Buy Consultant to review this feature!