

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 **Summary-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.

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!

BIG - BUYERS INTELLIGENCE GROUP

P.O. Box 480 • Napa, CA 94559 • Office 707-257-1456 • Fax 866-415-6782
www.BIGjewelers.com • info@BIGjewelers.com