Table of Contents

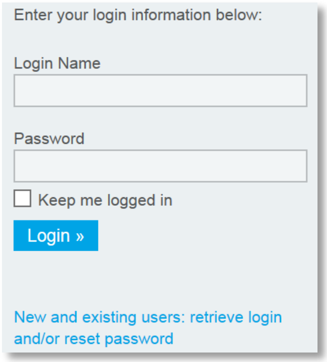
Requirements:

- We support importing to 2014 QuickBooks Pro Edition (Desktop). **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**.

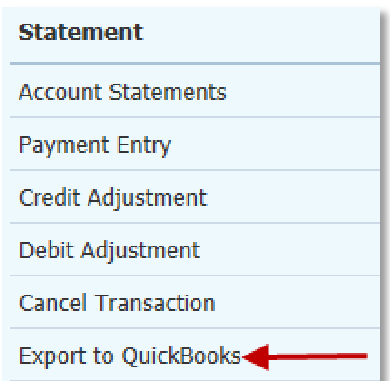


Step 3: Member Area. Now back on the homepage click on the **Member Area** link found in the top right corner.

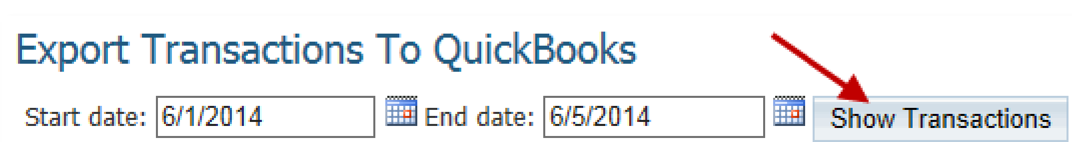
Step 4: On the Administration page, click on the **Organization (tab)…Dues & Billing (link)**

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

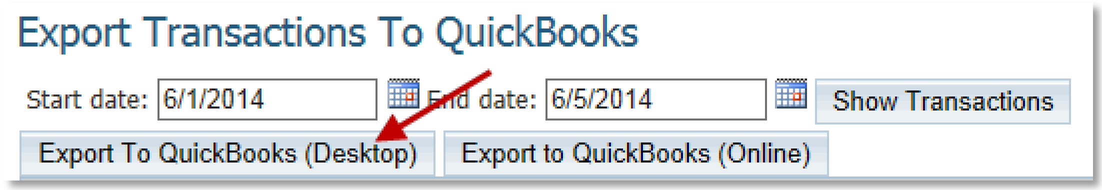
**Note: Make sure you already have your invoice generated! See "How to Generate an Invoice" section!*



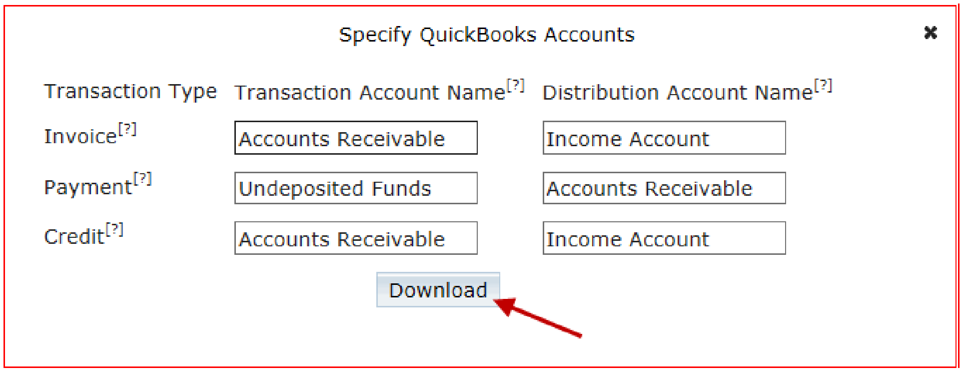
Step 6: Next select the **date range** for the invoices you would like to export. Then click on the **Show Transactions** button.



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



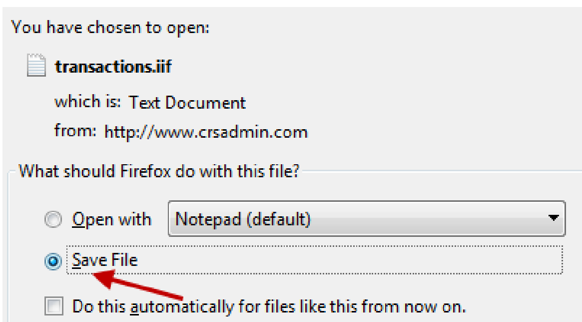
Step 8: On the Specify QuickBooks Accounts window click on the **Download** button.



Step 9: The system will save the file as: **Transactions.iif** (by default). Save the file somewhere to your computer. ****Note: Make sure you know where you have saved the file!***

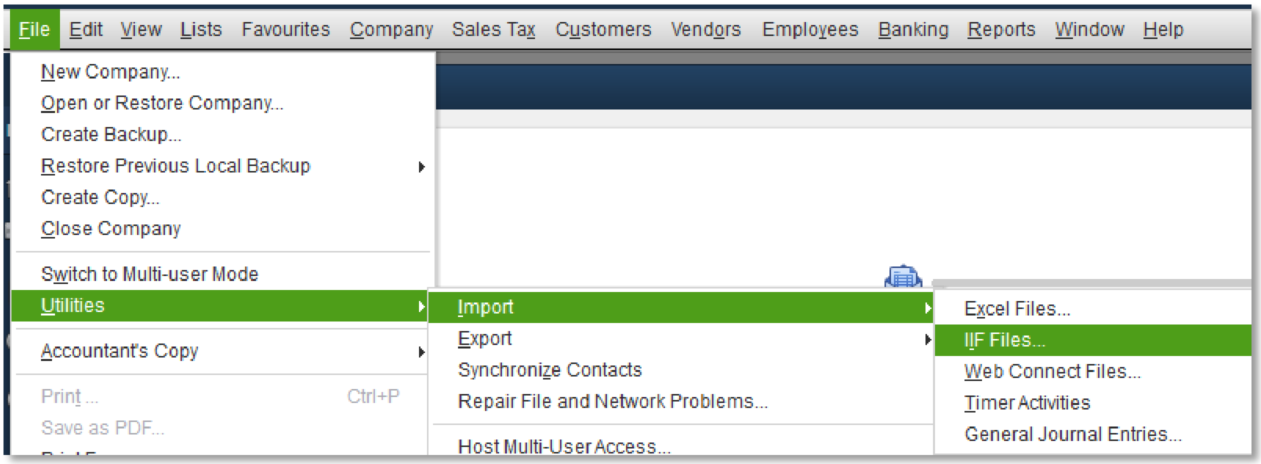
Internet Explorer:

Firefox:

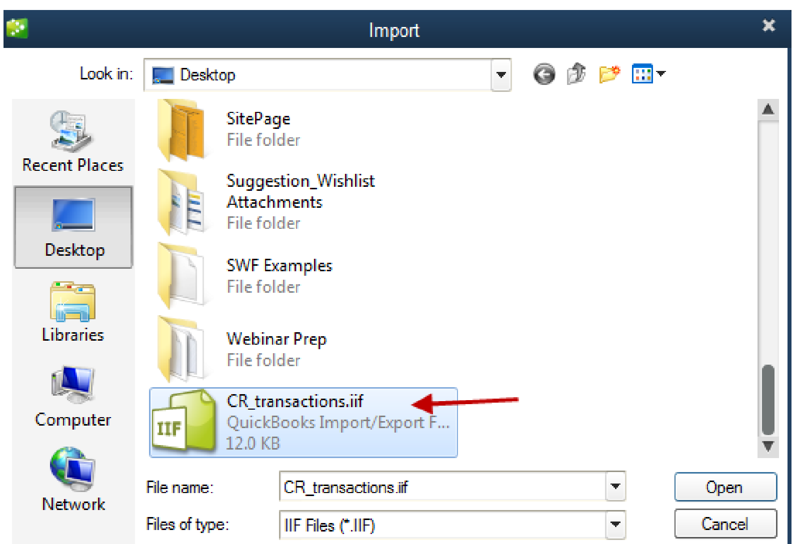


Google Chrome:

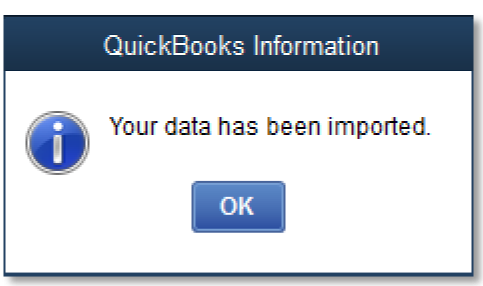
Step 10: Now that the export file is saved, open QuickBooks Pro (Desktop Edition). Then click on **File…Utilities…Import…IIF Files…**



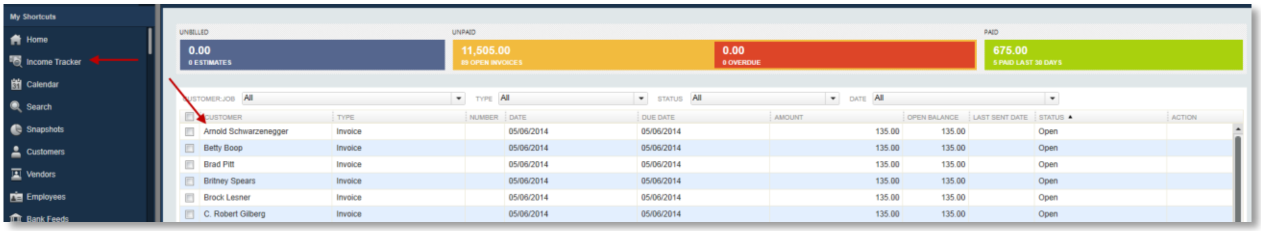
Step 11: Now **select (double click)** the **.IIF** file from your computer (refer to step 9)



Step 12: You should see a confirmation message popup after it is done. Click **OK**.



Step 13: Now click on the **Income Tracker** link (found on the left side) to see the imported information.

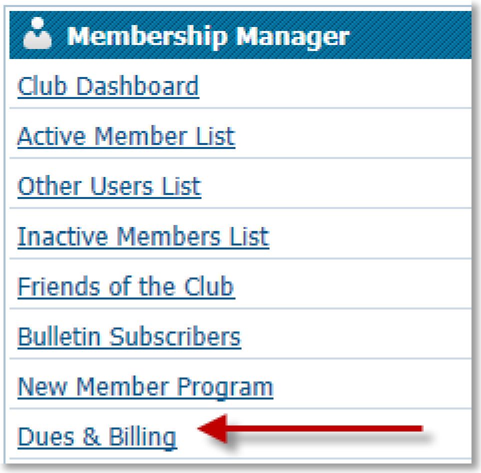


How to Generate an Invoice

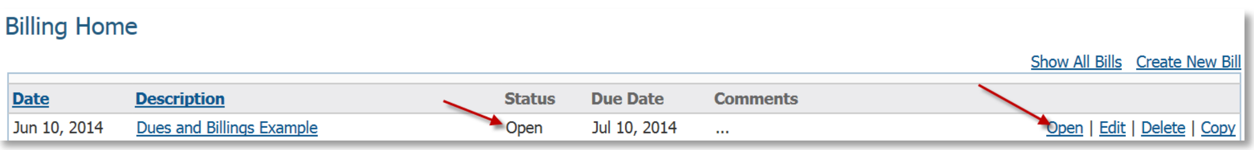
Below are the steps on how to generate an existing invoice:

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.