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| Invoice Expert |
| Importing and Exporting Customers and Products |
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| **6/8/2012** |

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# Importing Customers:

Open Invoice Expert XE and the company file you would like to use. From the full menu choose Import Customers.



From there you will be presented with the following screen:



The format of the import file is 1 record per line with tab characters between the fields.

If you already have an Excel spreadsheet of customers then importing them into Invoice Expert XE is easy.

Open your spreadsheet in Excel and add a new row at row 1.

Invoice Expert Importing and Exporting Data
Label each column with the appropriate header by putting the header text in row 1 for each column. The full list of available headers:

The smallest set of data Invoice Expert XE can import is a single column of either customer names or customer numbers. If you do not have a column for the corresponding data in your spreadsheet just leave the column out or leave the heading blank. Columns without headers are ignored.

CustomerNumber
CustomerName
BillToName
BillToStreet1
BillToStreet2
BillToCity
BillToState
BillToZip
BillToCountry
ShipToName
ShipToStreet1
ShipToStreet2
ShipToCity
ShipToState
ShipToZip
ShipToCountry
CCName
CCNumber
CCExpMonth
CCExpYear
ContactName
ContactPhone
ContactPhone2
ContactFax
ContactEmail
ContactTitle
CustomerNotes

Once the headers are in place select File -> Save As from Excel and for format, choose "Text (Tab delimited) (\*.txt), then click the Save button.

**HINT: If you do the export customers a file with all the column headers will be created for you.**

Now that you have your customers file ready click on “Select File” navigate and open the file. You will then be presented with the following screen:



From here simply click on Finalize Import and you are done. You will need to re-click the search under customers to see all the imported data.

# Exporting Customers:

Invoice Expert database is stored in a single file called PCInvXE.vdb3, by default this file is stored in your data store on your computer. The easiest way to determine location of your database is to open Invoice Expert and check the path being displayed on the bottom right corner, as shown below.

Open Invoice Expert XE and the company file you would like to use.

From the full menu choose Export Customers.



CustomerNumber
CustomerName
BillToName
BillToStreet1
BillToStreet2
BillToCity
BillToState
BillToZip
BillToCountry
ShipToName
ShipToStreet1
ShipToStreet2
ShipToCity
ShipToState
ShipToZip
ShipToCountry
CCName
CCNumber
CCExpMonth
CCExpYear
ContactName
ContactPhone
ContactPhone2
ContactFax
ContactEmail
ContactTitle
CustomerNotes

Excel and most other spreadsheet programs can open TSV (tab separated file) formatted files!

The exported file can be found under My Documents\Invoice Expert Exports

# Importing Products:

Open Invoice Export XE and the company file you would like to use. From the full menu on the main Import Products.



You will then be presented with the following screen:



If you already have an Excel spreadsheet of customers then importing them into Invoice Expert XE is easy.

Open your spreadsheet in Excel and add a new row at row 1.

Invoice Expert Importing and Exporting Data
Label each column with the appropriate header by putting the header text in row 1 for each column. The full list of available headers:

The smallest set of data Invoice Export XE can import is a single column of either product names or SKU codes. If you do not have a column for the corresponding data in your spreadsheet just leave the column out or leave the heading blank. Columns without headers are ignored.

SKU
ProductName
Description
Category
Stock
LowLimit
Price
Cost
Taxable
Taxable2
Service
BinLocation

The columns Taxable,Taxable2 and Service are "yes or no" fields. The column data can be t, true, y or yes, or f, false, n, or no.

Case is ignored in the headers so "ProductName" is the same as "productname" (don't include the quotes).

Once the headers are in place select File -> Save As from Excel and for format, choose "Text (Tab delimited) (\*.txt), then click the Save button.

**HINT: If you do the export products a file with all the column headers will be created for you.**

Now that you have your products file ready click on “Select File” navigate and open the file. You will then be presented with the following screen:



# Exporting Products:

Open Invoice Expert XE and the company file you would like to use. From the full menu choose Export Products.



Each record is on a single line with 1 tab character between the following fields in the order shown

SKU
ProductName
Description
Category
Stock
LowLimit
Price
Cost
Taxable
Taxable2
Service
BinLocation

Excel and most other spreadsheet programs can open TSV (tab separated file) formatted files!

The exported file can be found under My Documents\Invoice Expert Exports