

Exporting Clients Addresses from Timeslips v2004

Purpose:

This document was created to provide instructions for exporting client name and address information from Timeslips for use in a word processor mail merge or imported to other software programs for similar use. To utilize this feature a custom report template will have to be created using the Client Detail from Report Designer format. If you do not know how to create this report template, contact the **Integrated Visions (Visions)** Help Desk at 858-724-0044 to obtain a copy of the report template or for assistance.

Instructions

1. Create the custom report template using the Timeslips® Report Designer or obtain the template from **Visions**.
2. Download or create a custom report file in Timeslips named "client export.rpt" by obtaining it from **Visions** or creating it using the Client Detail from Report Designer format and save into F:\Timeslips\Report Templates folder. (Note: F:\ represents the server installation path for Timeslips)
3. Open Timeslips v2004
4. From the menu bar, select **File/Export**
5. Select the **Yellow Plus** icon located on the toolbar
6. Click on **Next** button
7. Select **Client Detail for Report Designer** report from the list
8. Select **Finish** button
9. Change the Group in the upper right hand corner to **General** by clicking the down arrow and choosing this option
10. In the **Description** field, type "Client Export"
11. Select the desired clients or if you want all clients, don't make any changes to the selection filter
12. (Optional) Select the **Sort** tab and modify the sort as needed
13. Select the **Format** tab
14. On the first field named **Report template file path** click on the yellow folder to locate the file downloaded in step #1 above.
15. The Select Report Template screen should automatically default to F:\Timeslips\Report Templates and the report named "client export.rpt" will be listed. If it is not, click the down arrow in the "Look in" field at the top to verify the correct report template path is in use.
16. Single click on the **client export.rpt** report format template
17. Select the **Open** button to choose this template for the export file
18. At the bottom right hand side of the screen, change the **Print to** option to "**File - Comma Delimited (CSV)**" by clicking the down arrow and choosing this option
19. Select **Print** button to provide a name and location of the file
20. At the top of the screen in the **Save In** field choose the location on the hard drive to save the exported data
21. In the lower left side of the screen, type in a **File Name** for the comma separated file
22. Select **Save** button to create the export file
23. Use the mail merge function of your word processor to locate the exported file and merge into your documents or envelopes.