# Customer Export Wizard

## Overview

The **Customer Export Wizard** can be used to export customers and their contact information to a data file. Supported formats include CSV, JSON, and XML.

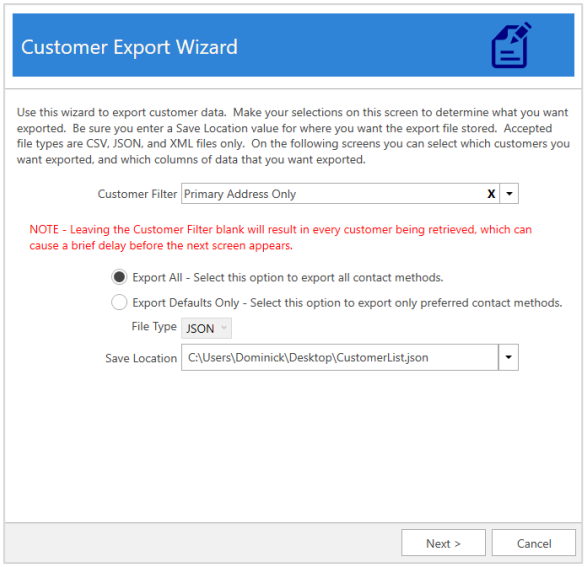
This tool can be used to export customer information for third-party cleanup. See **Customer Import Wizard** for information on importing cleaned up data back into the Edge.

**NOTE:** If you are exporting with the intention of importing this data back into the Edge you must include the Edge customer number.

## Exporting

To export customers using the wizard:

1. Click **Customers > Wizards > Customer Export.**




2. Use the **Customer Filter** drop-down to specify criteria. If you do not specify criteria, all customers will be included.
3. Select whether you want to **Export All** or **Export Defaults Only**.

| | |
|---|---|
| **Export All** | Exports customers along with all address, phone, and email methods on file. |
| **Export Default Only** | Exports customers with only the default (preferred) contact methods. All other contact methods are excluded. |

4. Use the **File Type** selector to choose the export format: CSV, JSON, or XML.
5. Choose a **Save Location**, then click **Next**.
6. All customers that matched the **Customer Filter** criteria will be displayed. Check the ones you wish to include and click **Next**.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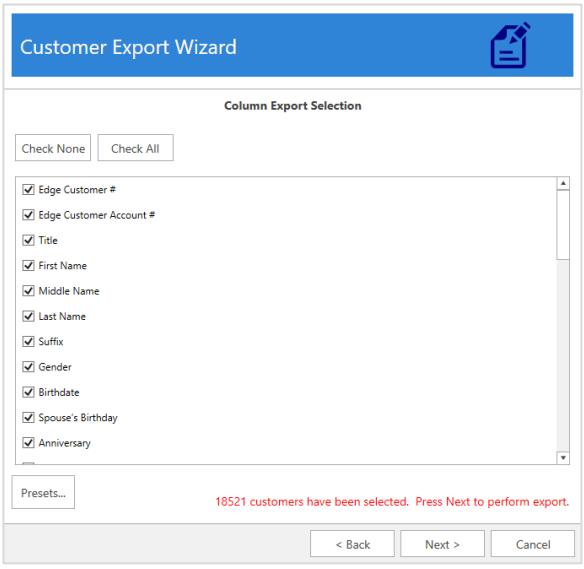
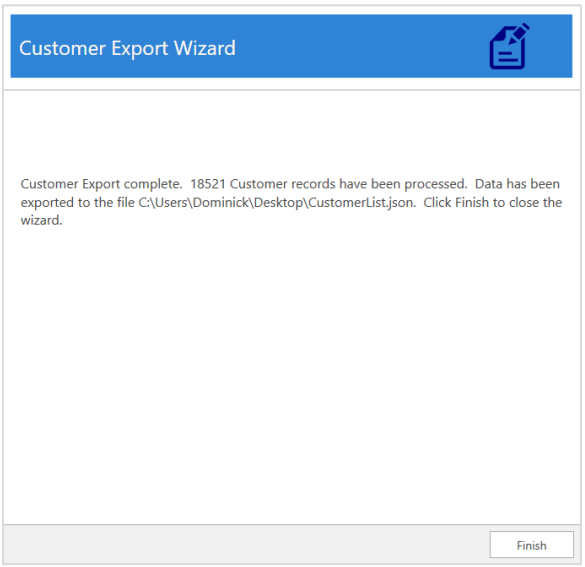
7. This screen allows you to choose what data to include from the customer record. Note that if you intend to import this file back into the Edge later, you must include **Edge Customer #**. Make your selections and click **Next**.




8. The export is now complete.





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