

**E. Exporting out of Primus**

- a. Select HC Export Generator on Internet favorites
- b. Select location
- c. Select Start and End Dates from calendar and click on arrow button
- d. Select Export to PDF
- e. Select Open
- f. Select Bookmarks
- g. Select backup page for each of the clients listed on the Receipts Report
- h. Select Print, Current Page, OK
- i. Select the last page and repeat step h
- j. Get Receipt By Payment Type report and receipt copies
- k. Match each printed out page with copy of receipt with the same receipt # listed in the Receipts # column on the Receipts Report
- l. Put receipt copies behind backup
- m. Put a Post-it note upside down on top backup page so that the Post-it sticks up higher than the page  
*\*Write on the Post-it note: Ca for cash and the amount of cash payment; Ck and the check number and the amount of the check; CC and the amount of the credit card payment*
- a. When all payments have been matched up, close HC Export screen
- b. Select Export To Dynamics
- c. Type in date \_\_/\_\_/\_\_
- d. Select Export To Dynamics
- e. Select Save
- f. Save to Sol\_Imp.dta , Yes