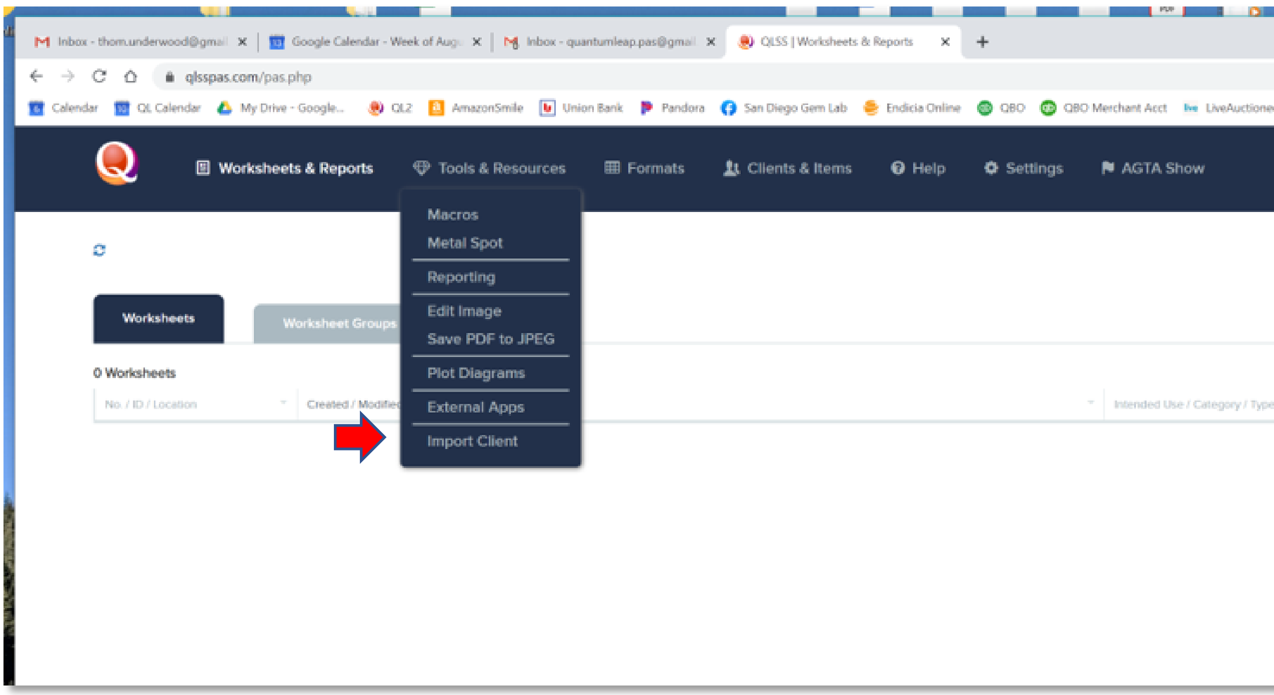
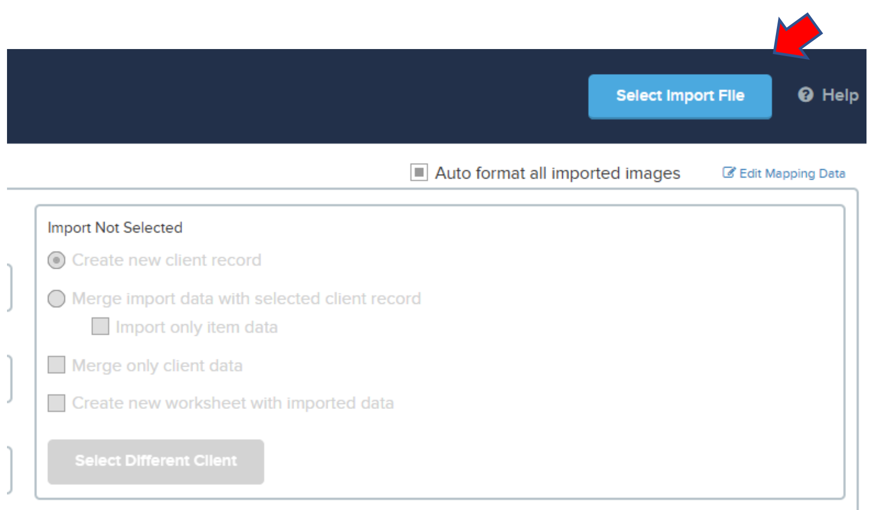
Importing Client Data File

Importing

- Log into QL2
- At the opening window click on the Tools and Resources menu and choose Import Client to open the Client window.



- Click on the Select Import File button and browse to the files exported from PAS and choose the one you want (files are named by client last/first name).



Import Client Window

Client Data

Client data and Options are shown in the top sections of the window.

New Client (to QL2)

- The right panel defaults to 'Create new Client record'.

Merge with Existing Client

- If the client data is already in QL2 the 'Merge import data with a client record' bullet will be available to activate.
    - 'Import only the item data' (no client data) will import only item data.
    - 'Merge only client data' will import only the client data (not any item data).

Create new worksheet with imported data

- Create new worksheet will, when imported, open a new worksheet and merge all the client and item data. The worksheet will need to be reviewed to assure worksheet settings are correct to the intended use of the import (e.g. appropriate template, Insurance, Estate, or…)

Merge with Different Client

If you want to merge the item data with an entirely different client (from the one you exported in PAS) click on the 'Select Different Client' button to open the Select Client window.

- Click in the Select Client search field and type the client's last name.
- Use the column header Sort/Find feature and/or scroll down, locate, and open the Client record

If merging data with an existing client, once the client is chosen, the client data will be displayed in the middle window.

- Click on the Import Client Data button to proceed with the Import.

- Close the Import tab (no need to Save to File).