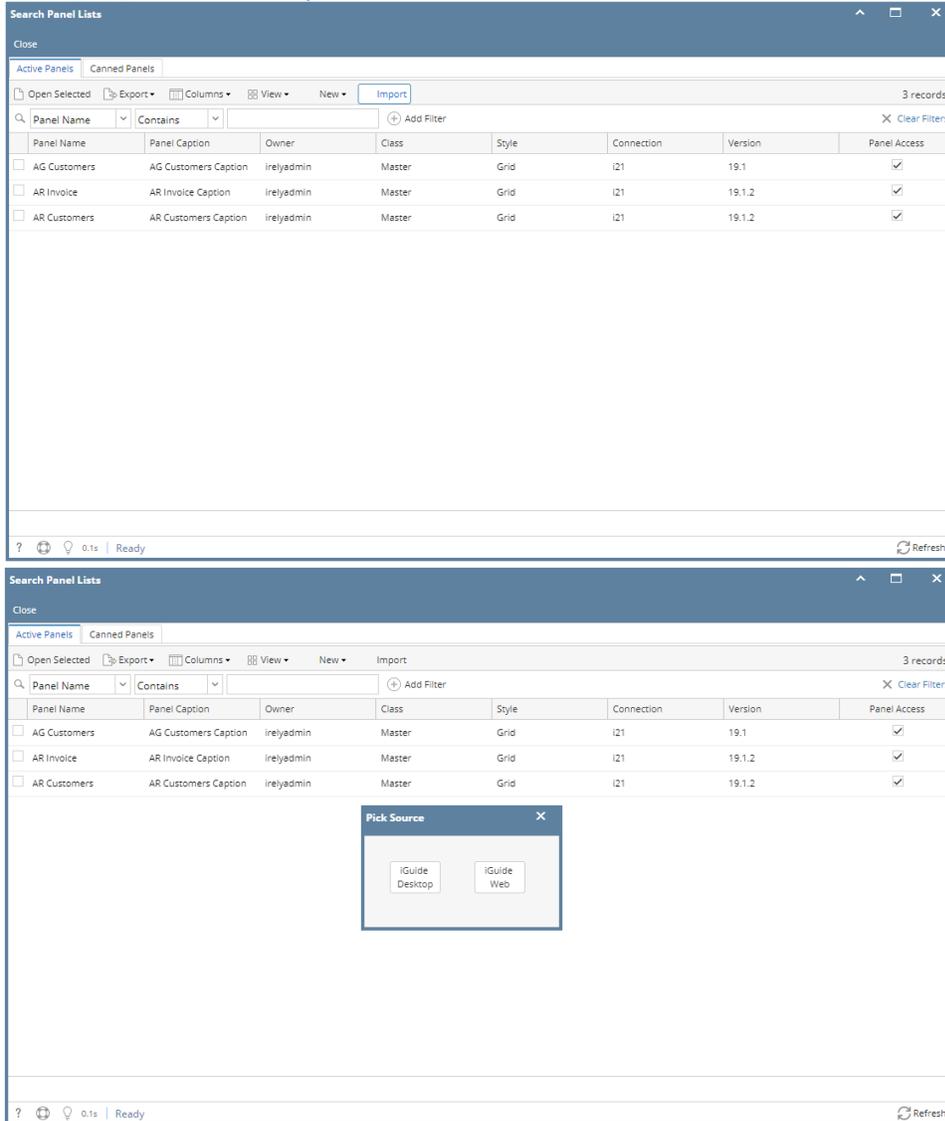


# How to Import Panels from Bizcore and iGuide Web

Users have the ability to import panels from **iGuide Desktop** and **iGuide Web** versions to be able to display on **i21 Dashboard**.

Here are the steps:

1. Open **Search Panel List** screen.
2. Click **Import grid** button to load **Pick Source** screen.



3. On **Pick Source** screen select either **iGuide Desktop** or **iGuide Web**. Log in screen will pop up as soon as the button is clicked. The user will need to enter the credentials they use to log on **iGuide Desktop** or **iGuide Web**.

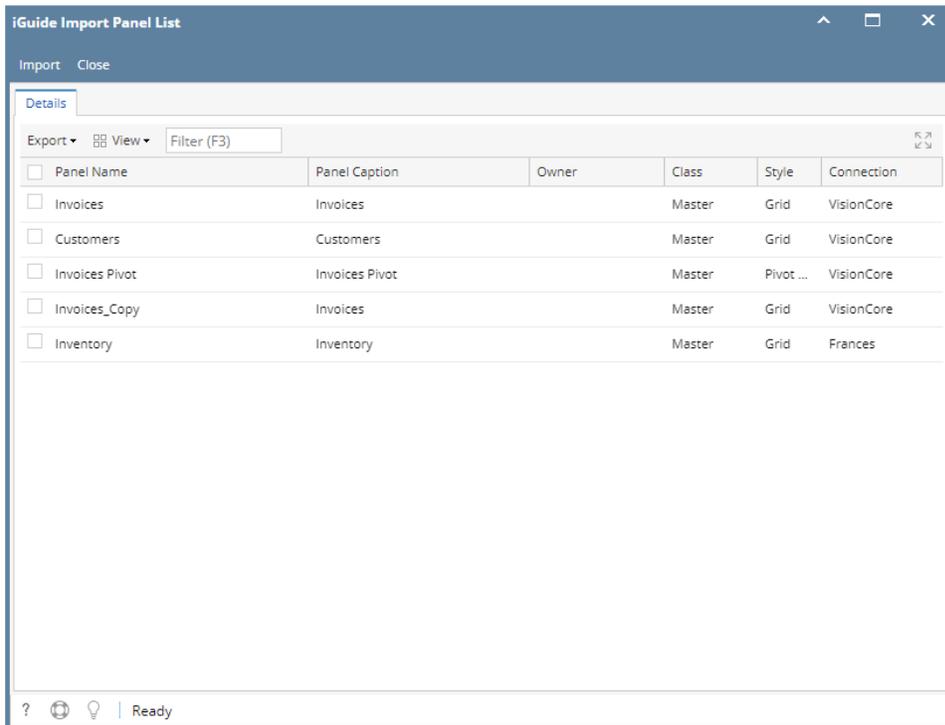


4. Once the user was able to log, **Panels** from screenshots above ( a or b) will appear on **iGuide Import Panel List** screen.

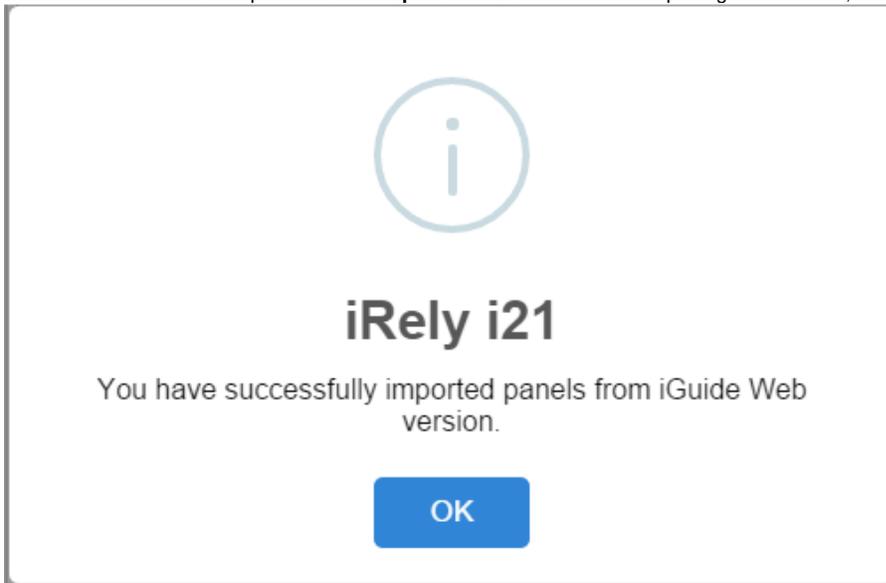
a. From iGuide Desktop:

Panel Name	Panel Caption	Owner	Class	Style	Connection
<input type="checkbox"/> jesmar panel 3	jesmar panel 3	admin2	Master	Grid	
<input type="checkbox"/> jesmar sample panel	jesmar sample panel	admin2	Master	Grid	
<input type="checkbox"/> Jesmar Sample Origin	Jesmar Sample Origin	admin2	Master	Grid	
<input type="checkbox"/> Panel Upload	Panel Upload	admin2	Master	Grid	
<input type="checkbox"/> AG - Customer Balances (SQL) 10.3	AG - Customer Balances (SQL)	admin2	Master	Grid	
<input type="checkbox"/> Ag - Customer 91-120 Days Past Due (S...	Ag - Customer 91-120 Days Past ...	admin2	Master	Grid	
<input type="checkbox"/> Ag - Customer 61-90 Days Past Due (SQ...	Ag - Customer 61-90 Days Past D...	admin2	Master	Grid	
<input type="checkbox"/> Ag - Customer 31-60 Days Past Due (SQ...	Ag - Customer 31-60 Days Past D...	admin2	Master	Grid	
<input type="checkbox"/> Ag - Current Customers (SQL) 10.3	Ag - Current Customers (SQL)	admin2	Master	Grid	
<input type="checkbox"/> Ag - Contracts by Salesperson (SQL) 10.3	Ag - Contracts by Salesperson (S...	admin2	Master	Grid	
<input type="checkbox"/> Ag - Open Receivables (SQL) 10.3	Ag - Open Receivables (SQL)	admin2	Master	Grid	
<input type="checkbox"/> Ag - Company Sales History (10.3)	Ag - Company Sales History (10.3)	admin2	Master	Pivot ...	
<input type="checkbox"/> Ag - Average Cost (SQL) 10.3	Ag - Average Cost (SQL)	admin2	Master	Grid	
<input type="checkbox"/> AG - AR Summary (SQL) 10.3	Ag - A/R Summary (SQL)	admin2	Master	Grid	

b. From iGuide Web:



5. Select desired Panel/s to import then click **Import toolbar button**. Once importing is successful, a message will pop up.



6. Click **OK** and close the **iGuide Import Panel List** screen.
7. Importes Panel/s will appear at the bottom part of the **Search Panel List** screen > **Active Panels tab**.
  - a. Imported from **iGuide Desktop**:

iGuide Import Panel List

Import Close

Details Update panel

Export View Filter (F3)

<input type="checkbox"/>	Panel Name	Panel Caption	Owner	Class	Style	Connection
<input checked="" type="checkbox"/>	AG - AR Summary (SQL) 10.3	Ag - A/R Summary (SQL)	admin2	Master	Grid	
<input checked="" type="checkbox"/>	Ag - Average Cost (SQL) 10.3	Ag - Average Cost (SQL)	admin2	Master	Grid	
<input checked="" type="checkbox"/>	Ag - Company Sales History (10.3)	Ag - Company Sales History (10.3)	admin2	Master	Pivot ...	
<input type="checkbox"/>	Ag - Open Receivables (SQL) 10.3	Ag - Open Receivables (SQL)	admin2	Master	Grid	
<input type="checkbox"/>	Ag - Contracts by Salesperson (SQL) 10.3	Ag - Contracts by Salesperson (S...	admin2	Master	Grid	
<input type="checkbox"/>	Ag - Current Customers (SQL) 10.3	Ag - Current Customers (SQL)	admin2	Master	Grid	
<input type="checkbox"/>	Ag - Customer 31-60 Days Past Due (SQ...	Ag - Customer 31-60 Days Past D...	admin2	Master	Grid	
<input type="checkbox"/>	Ag - Customer 61-90 Days Past Due (SQ...	Ag - Customer 61-90 Days Past D...	admin2	Master	Grid	
<input type="checkbox"/>	Ag - Customer 91-120 Days Past Due (S...	Ag - Customer 91-120 Days Past ...	admin2	Master	Grid	
<input type="checkbox"/>	AG - Customer Balances (SQL) 10.3	AG - Customer Balances (SQL)	admin2	Master	Grid	
<input type="checkbox"/>	Panel Upload	Panel Upload	admin2	Master	Grid	
<input type="checkbox"/>	Jesmar Sample Origin	Jesmar Sample Origin	admin2	Master	Grid	
<input type="checkbox"/>	jesmar sample panel	jesmar sample panel	admin2	Master	Grid	
<input type="checkbox"/>	jesmar panel 3	jesmar panel 3	admin2	Master	Grid	

? | Ready

iGuide Import Panel List

Import Close

Details

Export View Filter (F3)



**iRely i21**

You have successfully imported panels from iGuide Desktop version.

**OK**

<input type="checkbox"/>	Panel Name	Panel Caption	Owner	Class	Style	Connection
<input type="checkbox"/>	Ag - Open Receivables (SQL) 10.3	Ag - Open Receivables (SQL)	admin2	Master	Grid	
<input type="checkbox"/>	Ag - Contracts by Salesperson (SQL) 10.3	Ag - Contracts by Salesperson (S...	admin2	Master	Grid	
<input type="checkbox"/>	Ag - Current Customers (SQL) 10.3	Ag - Current Customers (SQL)	admin2	Master	Grid	
<input type="checkbox"/>	Ag - Customer 31-60 Days Past Due (SQ...	Ag - Customer 31-60 Days Past D...	admin2	Master	Grid	
<input type="checkbox"/>	Ag - Customer 61-90 Days Past Due (SQ...	Ag - Customer 61-90 Days Past D...	admin2	Master	Grid	
<input type="checkbox"/>	Ag - Customer 91-120 Days Past Due (S...	Ag - Customer 91-120 Days Past ...	admin2	Master	Grid	
<input type="checkbox"/>	AG - Customer Balances (SQL) 10.3	AG - Customer Balances (SQL)	admin2	Master	Grid	
<input type="checkbox"/>	Panel Upload	Panel Upload	admin2	Master	Grid	
<input type="checkbox"/>	Jesmar Sample Origin	Jesmar Sample Origin	admin2	Master	Grid	
<input type="checkbox"/>	jesmar sample panel	jesmar sample panel	admin2	Master	Grid	
<input type="checkbox"/>	jesmar panel 3	jesmar panel 3	admin2	Master	Grid	

? | Ready

Search Panel Lists

Close

Active Panels | Canned Panels

Open Selected | Export | Columns | View | New | Import | 6 records

Panel Name | Contains | Add Filter | Clear Filters

Panel Name	Panel Caption	Owner	Class	Style	Connection	Version	Panel Access
<input type="checkbox"/> AG Customers	AG Customers Caption	irelyadmin	Master	Grid	I21	19.1	<input checked="" type="checkbox"/>
<input type="checkbox"/> AR Invoice	AR Invoice Caption	irelyadmin	Master	Grid	I21	19.1.2	<input checked="" type="checkbox"/>
<input type="checkbox"/> AR Customers	AR Customers Caption	irelyadmin	Master	Grid	I21	19.1.2	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> AG - AR Summary (SQL...	Ag - AR Summary (SQL)	irelyadmin	Master	Grid	I21	5	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Ag - Average Cost (SQL...	Ag - Average Cost (SQL)	irelyadmin	Master	Grid	I21	5	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Ag - Company Sales HI...	Ag - Company Sales HI...	irelyadmin	Master	Pivot Grid	I21	5	<input checked="" type="checkbox"/>

? | 0.1s | Ready | Refresh

b. Imported from iGuide Web:

iGuide Import Panel List

Import | Close

Update panel

Export | View | Filter (F3) | 15 of 15

Panel Name	Panel Caption	Owner	Class	Style	Connection
<input checked="" type="checkbox"/> Invoices	Invoices		Master	Grid	VisionCore
<input checked="" type="checkbox"/> Customers	Customers		Master	Grid	VisionCore
<input type="checkbox"/> Invoices Pivot	Invoices Pivot		Master	Pivot ...	VisionCore
<input type="checkbox"/> Invoices_Copy	Invoices		Master	Grid	VisionCore
<input type="checkbox"/> Inventory	Inventory		Master	Grid	Frances

? | Ready

**iGuide Import Panel List**

Import Close

Details

Export View Filter (F2)

Panel Name  
 Invoices Pivot  
 Invoices\_Copy  
 Inventory

Style	Connection
Pivot ...	VisionCore
Grid	VisionCore
Grid	Frances



**iRely i21**

You have successfully imported panels from iGuide Web version.

**OK**

? | Ready

**Search Panel Lists**

Close

Active Panels Canned Panels

Open Selected Export Columns View New Import 5 records

Panel Name Contains Add Filter Clear Filters

Panel Name	Panel Caption	Owner	Class	Style	Connection	Version	Panel Access
<input type="checkbox"/> AG Customers	AG Customers Caption	irelyadmin	Master	Grid	i21	19.1	<input checked="" type="checkbox"/>
<input type="checkbox"/> AR Invoice	AR Invoice Caption	irelyadmin	Master	Grid	i21	19.1.2	<input checked="" type="checkbox"/>
<input type="checkbox"/> AR Customers	AR Customers Caption	irelyadmin	Master	Grid	i21	19.1.2	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Invoices	Invoices	irelyadmin	Master	Grid	i21	12.0	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Customers	Customers	irelyadmin	Master	Grid	i21	12.0	<input checked="" type="checkbox"/>

? | 0.1s | Ready Refresh