## 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:

- Open Search Panel List screen.
   Click Import grid button to load Pick Source screen

Search Panel Lists							^ □ ×
Active Panels Canne	ed Panels						
🗅 Open Selected 🛛 🕞	Export • 🔲 Columns • 🛞	View • New •	Import				3 records
Q. Panel Name	✓ Contains ✓		+ Add Filter				🗙 Clear Filter
Panel Name	Panel Caption	Owner	Class	Style	Connection	Version	Panel Access
AG Customers	AG Customers Caption	irelyadmin	Master	Grid	i21	19.1	<b>&gt;</b>
AR Invoice	AR Invoice Caption	irelyadmin	Master	Grid	i21	19.1.2	<b>&gt;</b>
AR Customers	AR Customers Caption	irelyadmin	Master	Grid	i21	19.1.2	$\checkmark$
? D Q 0.1s	Ready						C Refrest
Open Selected	Ready td Panels	View - New -	lanat				C Refresh
Cose     Connect Lists Close     Connect Lists Close     Open Selected     Dens Name	Ready ed Panels Export • Columns • Br	View • New •	Import				CRefresh
Cose     Connel Lists     Close     Active Panels     Connel     Open Selected     Panel Name     Panel Name	Ready  cd Panels  Export  Contains  Panel Caption  Fanel Caption	View • New •	Import   Add Fliter  Class	Style	Connection	Version	C Refrest
?     D     0.1s       earch Panel Lists       Close       Active Panels     Canne       Open Selected     D       Panel Name     Panel Name       Panel Name     AG Customers	Ready Export Columns B Contains Columns B Contains Coption AG Customers Caption	View + New + Owner irelyadmin	Import ① Add Filter Class Master	Style Grid	Connection 121	Version 19.1	CRefrest
?     D     0.1s       sarch Panel Lists       lobe       Active Panels     Canne       Dopen Selected     By       A Panel Name     Panel Name       Panel Name     AG Customers       A Rinvoice	Ready  Ed Panels  Export  Contains  Panel Caption  A G Customers Caption  A Invoice Caption	View • New • Owner Irelyadmin Irelyadmin	Import ① Add Filter Class Master Master	Style Grid Grid	Connection 121 121	Version 19.1 19.1.2	CREFFEST Refrest 3 record X Clear Filter Panel Access V V
?     ①     0.12       earch Panel Lists       bose       Active Panels     Canne       Øpen Selected     ③       A     Panel Name       Panel Name     AG Customers       A Rinvolce     AR Customers	Ready Id Panels Export - Columns - By Contains - Sy Panel Caption AG Customers Caption AR Invoice Caption AR Customers Caption	View • New • Owner irelyadmin irelyadmin irelyadmin	Import ① ① Add Filter Class Master Master Master	Style Grid Grid Grid	Connection 121 121 121	Version 19.1 19.1.2 19.1.2	CRefrest A Clear Filter Panel Access Ø Ø Ø
?     ①     0.1z       earch Panel Lists       Close       Active Panels     Canne       Open Selected     ③       ?     Panel Name       Panel Name     AC Customers       .     AR Involce       .     AR Customers	Ready  Id Panels  Export Contains Columns Ready  Contains Panel Caption AG Customers Caption AR Invoice Caption AR Customers Caption	View • New • Owner irelyadmin irelyadmin irelyadmin	Import  Add Filter  Class  Master  Master  Pick Source  IGuide  Desktop	Style Grid Grid Grid IGuide Web	Connection 121 121 121	Version 19.1 19.1.2 19.1.2	<sup>2</sup> Refres <sup>2</sup> Refres <sup>3</sup> record <sup>2</sup> Clear Filte <sup>2</sup> Refres <sup>2</sup> Refres <sup>2</sup> Refres <sup>2</sup> Refres <sup>2</sup> Refres
?     ①     0.1a       earch Panel Lists       Clore       Active Panels     Canne       Open Selected     ③       Panel Name     Panel Name       AG Customers     A R Invoice       AR Customers	Ready  td Panels  Export Contains Columns Ready Contains Columns AG Customers Caption AR Involce Caption AR Customers Caption	View • New • Owner Irelyadmin Irelyadmin Irelyadmin	Import    Add Filter  Class  Master  Master  Pick Source  IGuide  Desktop	Style Grid Grid Grid IGuide Web	Connection 121 121 121	Version 19.1 19.12 19.12	☐ Refrest A Car X 3 record X Clear Filter Panel Access Ø Ø Ø Ø

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:

iGuide Import Panel List				/		×
Import Close						
Details						
Export - 🔡 View - Filter (F3)						кл КУ
Panel Name	Panel Caption	Owner	Class	Style	Connection	
jesmar panel 3	jesmar panel 3	admin2	Master	Grid		
jesmar sample panel	jesmar sample panel	admin2	Master	Grid		
Jesmar Sample Origin	Jesmar Sample Origin	admin2	Master	Grid		
Panel Upload	Panel Upload	admin2	Master	Grid		
AG - Customer Balances (SQL) 10.3	AG - Customer Balances (SQL)	admin2	Master	Grid		
Ag - Customer 91-120 Days Past Due (S	Ag - Customer 91-120 Days Past	admin2	Master	Grid		
Ag - Customer 61-90 Days Past Due (SQ	Ag - Customer 61-90 Days Past D	admin2	Master	Grid		
Ag - Customer 31-60 Days Past Due (SQ	Ag - Customer 31-60 Days Past D	admin2	Master	Grid		
Ag - Current Customers (SQL) 10.3	Ag - Current Customers (SQL)	admin2	Master	Grid		
Ag - Contracts by Salesperson (SQL) 10.3	Ag - Contracts by Salesperson (S	admin2	Master	Grid		
Ag - Open Receivables (SQL) 10.3	Ag - Open Receivables (SQL)	admin2	Master	Grid		
Ag - Company Sales History (10.3)	Ag - Company Sales History (10.3)	admin2	Master	Pivot		
Ag - Average Cost (SQL) 10.3	Ag - Average Cost (SQL)	admin2	Master	Grid		
AG - AR Summary (SQL) 10.3	Ag - A/R Summary (SQL)	admin2	Master	Grid		
? 🔘 🖓 Ready						

b. From iGuide Web:

iGuide Import Panel List					^ □	x
Import Close						
Details						
Export • 🔠 View • Filter (F3)						К Л Ц Ц
Panel Name	Panel Caption	Owner	Class	Style	Connection	
Invoices	Invoices		Master	Grid	VisionCore	
Customers	Customers		Master	Grid	VisionCore	
Invoices Pivot	Invoices Pivot		Master	Pivot	VisionCore	
Invoices_Copy	Invoices		Master	Grid	VisionCore	
Inventory	Inventory		Master	Grid	Frances	
? 🖽 🎖 Ready						

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.
- 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					^ □	]	x
Import Close							
Details Update panel							
Export - 🔡 View - Filter (F3)							кл И У
Panel Name	Panel Caption	Owner	Class	Style	Connect	ion	
AG - AR Summary (SQL) 10.3	Ag - A/R Summary (SQL)	admin2	Master	Grid			
Ag - Average Cost (SQL) 10.3	Ag - Average Cost (SQL)	admin2	Master	Grid			
Ag - Company Sales History (10.3)	Ag - Company Sales History (10.3)	admin2	Master	Pivot			
Ag - Open Receivables (SQL) 10.3	Ag - Open Receivables (SQL)	admin2	Master	Grid			
Ag - Contracts by Salesperson (SQL) 10.3	Ag - Contracts by Salesperson (S	admin2	Master	Grid			
Ag - Current Customers (SQL) 10.3	Ag - Current Customers (SQL)	admin2	Master	Grid			
Ag - Customer 31-60 Days Past Due (SQ	Ag - Customer 31-60 Days Past D	admin2	Master	Grid			
Ag - Customer 61-90 Days Past Due (SQ	Ag - Customer 61-90 Days Past D	admin2	Master	Grid			
Ag - Customer 91-120 Days Past Due (S	Ag - Customer 91-120 Days Past	admin2	Master	Grid			
AG - Customer Balances (SQL) 10.3	AG - Customer Balances (SQL)	admin2	Master	Grid			
Panel Upload	Panel Upload	admin2	Master	Grid			
Jesmar Sample Origin	Jesmar Sample Origin	admin2	Master	Grid			
jesmar sample panel	jesmar sample panel	admin2	Master	Grid			
jesmar panel 3	jesmar panel 3	admin2	Master	Grid			
? 💭 🖓 Ready							
							_
iGuide Import Panel List					^ □	]	x
iGuide Import Panel List Import Close					^	1	x
iGuide Import Panel List Import Close					^	]	×
iGuide Import Panel List Import Close Details Export + IB View +		_	_		^	]	X
iGuide Import Panel List Import Close Details Export  H View  F Panel Name		_	_	Style	Connect	iion	X
iGuide Import Panel List Import Close Details Export → ⊞ View → F Panel Name Ag - Open Receivabl		_		Style	Connect	l	×
iGuide Import Panel List Import Close Details Export + B View + F Panel Name Ag - Open Receivabl Ag - Contracts by Sa	(j)			Style Grid Grid	Connect	ion	×
iGuide Import Panel List Import Close Details Export + B View + F Panel Name Ag - Open Receivabl Ag - Contracts by Sa Ag - Current Custom	i			Style Grid Grid Grid	Connect	ion	×
iGuide Import Panel List Import Close Details Export + 部 View + F Panel Name Ag - Open Receivabl Ag - Contracts by Sa Ag - Current Custom Ag - Customer 31-60	i			Style Grid Grid Grid Grid	Connect	ion	×
iGuide Import Panel List Import Close Details Export + 田 View + 子 Panel Name Ag - Open Receivabl Ag - Contracts by Sa Ag - Current Custom Ag - Customer 31-60 Ag - Customer 61-90	iRely i21			Style Grid Grid Grid Grid Grid	Connect	ion	×
iGuide Import Panel List Import Close  Details  Export ← B View ← F  Panel Name Ag - Open Receivabl Ag - Contracts by Sa Ag - Current Custom Ag - Customer 31-60 Ag - Customer 91-12 You have s	i Rely i21 successfully imported pane	 Is from iGuide	Desktop	Style Grid Grid Grid Grid Grid Grid	Connect	ion	×
iGuide Import Panel List Import Close Details Export ← B View ← F Panel Name Ag - Open Receivabl Ag - Contracts by Sa Ag - Current Custom Ag - Customer 31-50 Ag - Customer 61-90 Ag - Customer 91-12 You have si	iRely i21 successfully imported pane version.	<b>I</b> Is from iGuide I	Desktop	Style Grid Grid Grid Grid Grid Grid Grid	Connect	ion	×
iGuide Import Panel List Import Close  Details  Export  Panel Name Ag - Open Receivabl Ag - Current Custom Ag - Current Custom Ag - Customer 31-60 Ag - Customer 91-12 You have s AG - Customer 91-12 You have s AG - Customer Balar Panel Upload	iRely i21 successfully imported pane version.	I Is from iGuide I	Desktop	Style Grid Grid Grid Grid Grid Grid Grid Grid	Connect	ion	×
iGuide Import Panel List Import Close Details Export + BB View + F Panel Name Ag - Open Receivabl Ag - Contracts by Sa Ag - Current Custom Ag - Customer 31-60 Ag - Customer 91-12 You have = AG - Customer Balar Panel Upload Jesmar Sample Orig	iRely i21 successfully imported pane version.	I Is from iGuide I	Desktop	Style Grid Grid Grid Grid Grid Grid Grid Grid	Connect	ion	×
iGuide Import Panel List Import Close	iRely i21 successfully imported pane version.	<b> </b> Is from iGuide I	Desktop	Style Grid Grid Grid Grid Grid Grid Grid Grid	Connect	l	×
iGuide Import Panel List Import Close  Details Export ← B View ← F Panel Name Ag - Open Receivabl Ag - Contracts by Sa Ag - Current Custom Ag - Customer 31-60 Ag - Customer 31-60 Ag - Customer 91-12 You have st AG - Customer Balar Panel Upload Jesmar Sample Orig jesmar Sample Pane jesmar panel 3	iRely i21 successfully imported pane version.	Is from iGuide I	Desktop	Style Grid Grid Grid Grid Grid Grid Grid Grid	Connect	ion	×
iGuide Import Panel List Import Close	iRely i21 successfully imported pane version. OK	I Is from iGuide I admin2	Desktop	Style Grid Grid Grid Grid Grid Grid Grid Grid	Connect	ion	
iGuide Import Panel List Import Close	iRely i21 successfully imported pane version.	Is from iGuide I	Desktop	Style Grid Grid Grid Grid Grid Grid Grid Grid	Connect	ion	×
iGuide Import Panel List Import Close	iRely i21 successfully imported pane version. OK	Is from iGuide I admin2	Desktop Master	Style Grid Grid Grid Grid Grid Grid Grid Grid	Connect	ion	×

Search Panel Lists							^ D	×
Close								
Active Panels Canned Pan	els							
🗅 Open Selected 🛛 🕞 Expor	rt 🕶 🔝 Columns 👻 🔡	View - New -	Import				6 r	ecords
Q Panel Name Y	Contains 🗸		+ Add Filter				× Clea	r Filters
Panel Name	Panel Caption	Owner	Class	Style	Connection	Version	Panel Acce	ss
AG Customers	AG Customers Caption	irelyadmin	Master	Grid	i21	19.1	~	
AR Invoice	AR Invoice Caption	irelyadmin	Master	Grid	i21	19.1.2	~	
AR Customers	AR Customers Caption	irelyadmin	Master	Grid	i21	19.1.2	~	
AG - AR Summary (SQL	Ag - A/R Summary (SQL)	irelyadmin	Master	Grid	i21	5	~	
Ag - Average Cost (SQL	Ag - Average Cost (SQL)	irelyadmin	Master	Grid	i21	5	~	
Ag - Company Sales Hi	Ag - Company Sales Hi	irelyadmin	Master	Pivot Grid	i21	5	~	

2	0	0	0.1=	Ready

? 🔘 🍚 | Ready

iGuide Import Panel List					^ □	×
Import Close						
Deta Update panel						
Export - 🔡 View - Filter (F3)						<pre>K ≠ K ≠</pre>
Panel Name	Panel Caption	Owner	Class	Style	Connection	
Invoices	Invoices		Master	Grid	VisionCore	
Customers	Customers		Master	Grid	VisionCore	
Invoices Pivot	Invoices Pivot		Master	Pivot	VisionCore	
Invoices_Copy	Invoices		Master	Grid	VisionCore	
Inventory	Inventory		Master	Grid	Frances	

CRefresh

