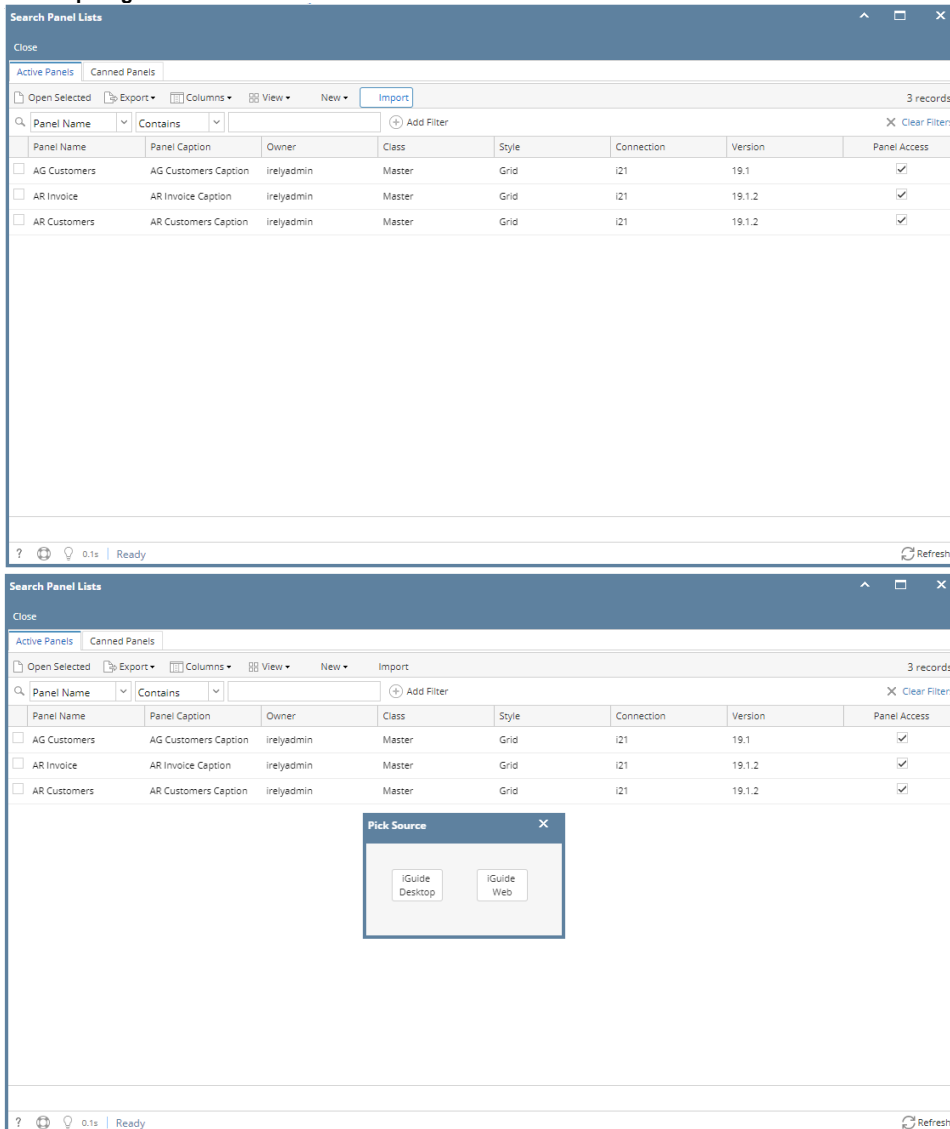


How to Import Panels from Bizcore and iGuide Web

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:

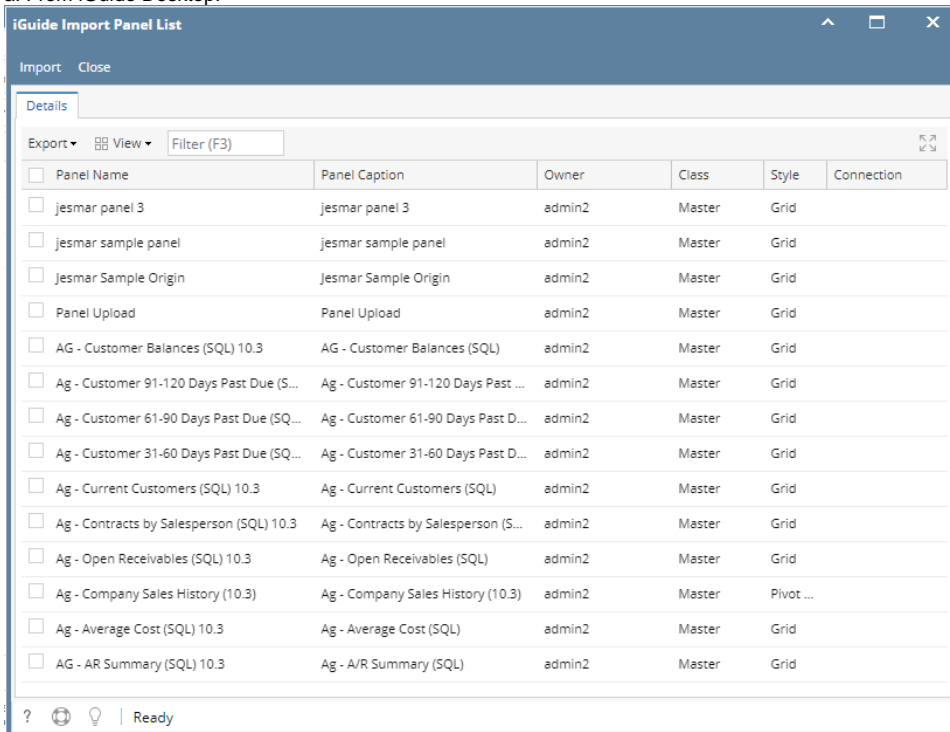
1. Open **Search Panel List** screen.
2. Click **Import grid button** to load **Pick Source** screen.



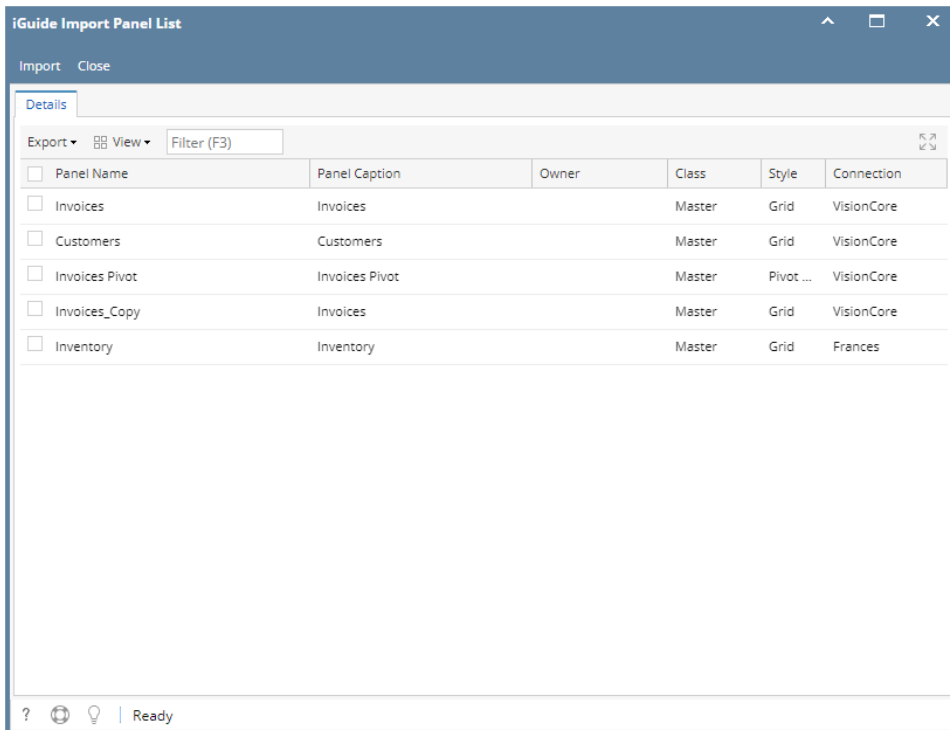
3. On **Pick Source** screen select either **iGuide Desktop** or **iGuide Web**. Log in screen will pop up as soon as the button is clicked. The user will need to enter the credentials they use to log on **iGuide Desktop** or **iGuide Web**.



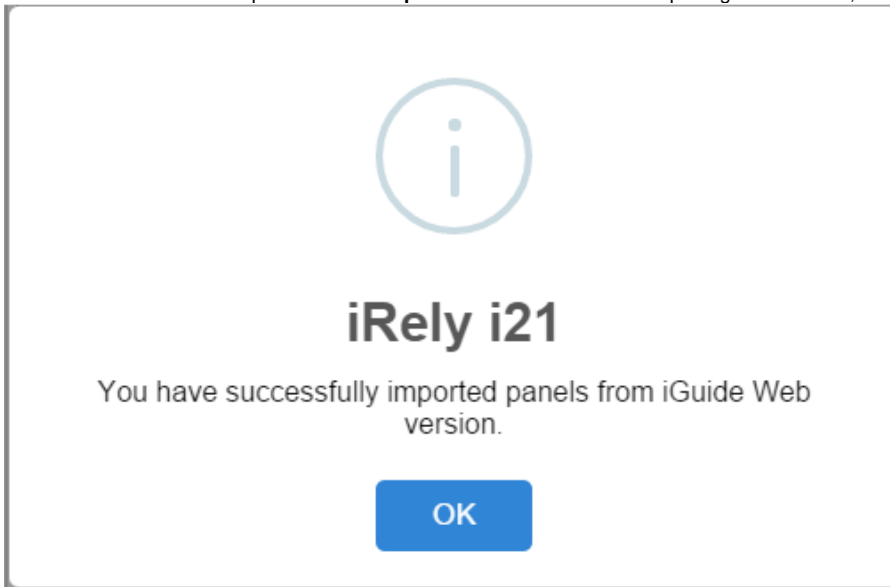
4. Once the user was able to log, **Panels** from screenshots above (**a** or **b**) will appear on **iGuide Import Panel List** screen.
a. From iGuide Desktop:



- 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

Update panel

Export

View

Filter (F3)

<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

iRely i21

You have successfully imported panels from iGuide Desktop version.

OK

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 - A/R 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

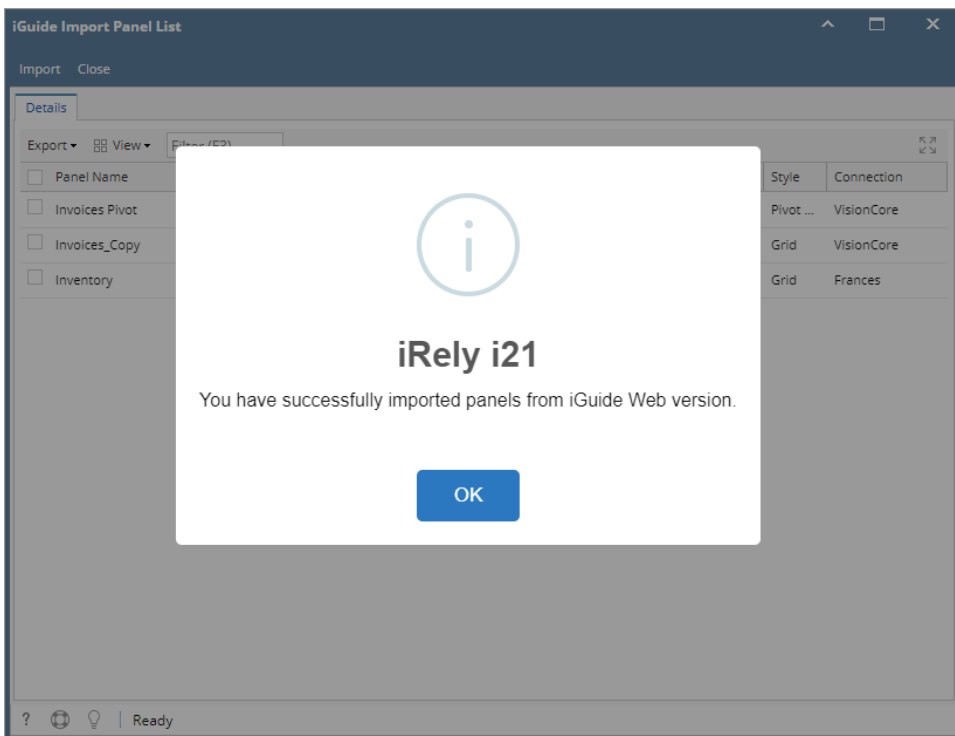
Import Close

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



Search Panel Lists							
Close							
Active Panels				Canned Panels			
Open Selected				Export			
Columns				View			
New				Import			
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"/>

5 records

0.1s | Ready

Refresh