

AT-A-GLANCE: IMPORTING ID'S INTO CLIPBOARD

WHEN TO USE IMPORT ID FUNCTION

Users are able to import lists of Entity or Prospect ID's back into Advance via the Clipboard Import ID function. Once the Advance ID's are loaded back into clipboard, users can select from the context sensitive report list and retrieve updated information on the selected entities, such as updated address information, contact information, etc. Different types of ID's can be imported back into Advance, such as Prospect and Proposal ID's. Importing ID's back into clipboard and running a context sensitive report from the clipboard application will automatically delete deceased or no contact requested entities.

STEP 1: EXCEL TO NOTEPAD FORMATTING

Open Excel document that holds the Advance ID's
Copy and Paste Advance ID's into Notepad

*To access Notepad, right click on desktop, click New, click Notepad

Once Advance ID's are in Notepad, ensure all spaces and words are deleted. Only numbers should remain.

Save the Notepad file as a .txt

STEP 2: IMPORT ID'S INTO ADVANCE CLIPBOARD

Log into Advance

Go to Clipboard

Click Import List

Click Browse

Find .txt file on your computer

Click Import New

The Advance ID list should now be visible in the clipboard application

STEP 3: RUN A REPORT OR SAVE A CLIPBOARD

Now that the ID list is imported back into Advance, users can run any context sensitive report by clicking on Actions - Reports or save the clipboard by clicking on Save.

