

Introduction

If you are a printLEADER user who wants to migrate to PrintSmith Vision, you can import your account data (customers and contacts) into PrintSmith Vision. After you import the accounts, you can import the history for those accounts so you have it as a reference when using PrintSmith Vision to create jobs.

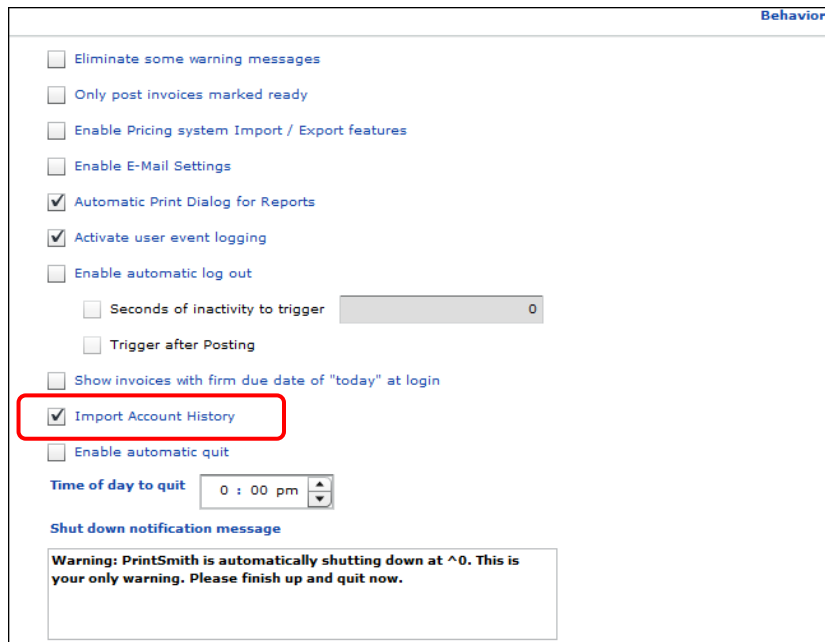
This document assumes that:

- PrintSmith Vision is installed with the NEW USER option as described in the *PrintSmith Vision Installation and Upgrade Guide*.
- You have exported your customers, contacts, and account history from printLEADER in the correct formats.

If You Plan to Import Account History

Before you can import your printLEADER account history, you must turn on a setting in the PrintSmith Vision System Behavior preferences:

1. In PrintSmith Vision, click **Preferences** in the QuickAccess panel. The System Behavior preferences are automatically displayed.
2. Select the **Import Account History** check box.



The screenshot shows the 'Behavior' preferences window in PrintSmith Vision. The 'Import Account History' checkbox is checked and highlighted with a red box. Other settings include 'Automatic Print Dialog for Reports', 'Activate user event logging', and 'Time of day to quit' set to 0 : 00 pm. A warning message at the bottom states: 'Warning: PrintSmith is automatically shutting down at ^0. This is your only warning. Please finish up and quit now.'

3. Click **Save**.

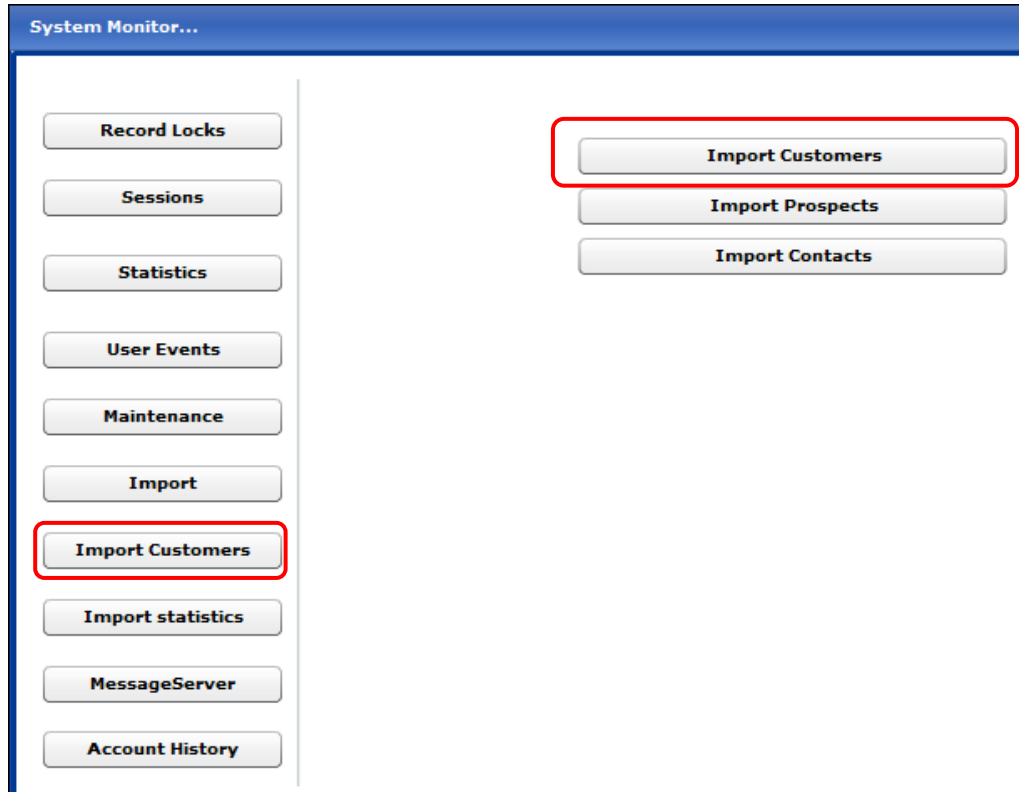
Importing Your printLEADER Accounts and History

Be sure to import your data in this order:

1. Customers
2. Contacts
3. Account history

Step 1: Import Your Customers

1. In PrintSmith Vision, select **Admin > System Monitor**. The System Monitor window opens.
2. Click **Import Customers**. The window now includes some additional buttons on the right.



3. Click **Import Customers** on the right, browse to your customer import file, and click **Open**.
4. Depending on the number of customers you are importing, the import may take some time. When you get the message "Import complete," click **OK**.

Note After you import your customers do not edit their names before you import account history. If the customer names are changed, the system will not be able to associate the history with those customers.

Step 2: Import Your Contacts

After you successfully import your customers, you can import your contacts.

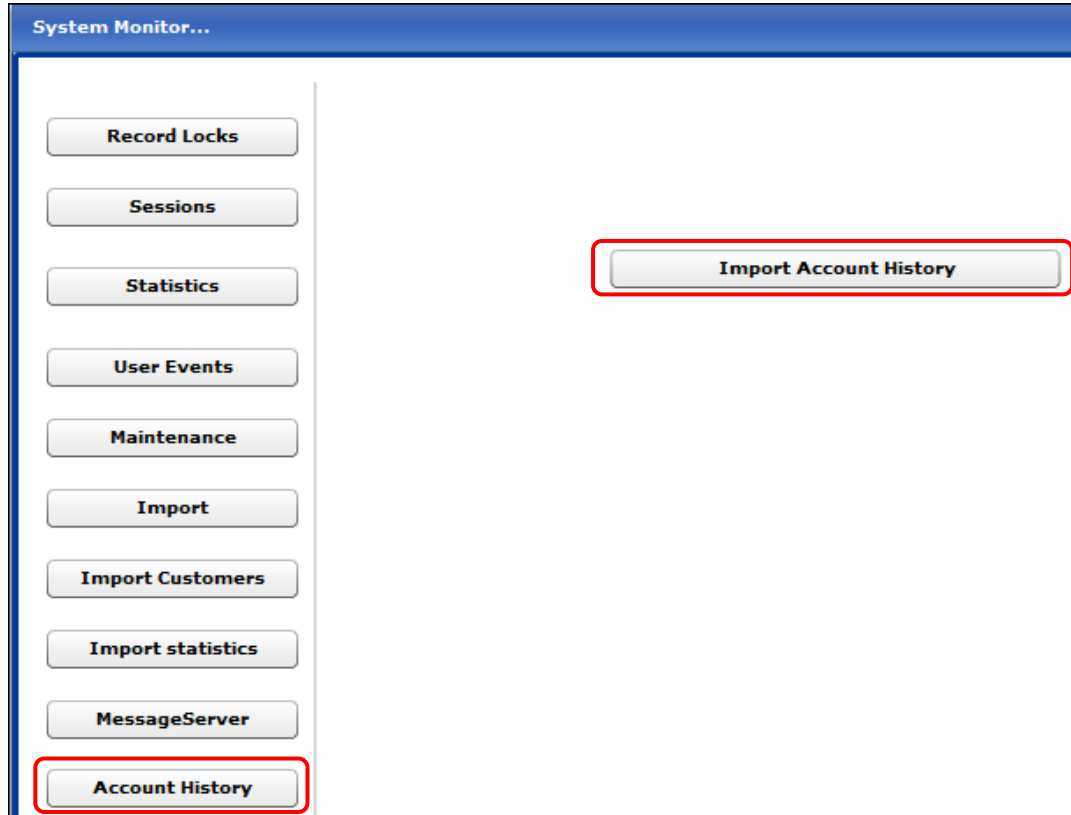
1. Complete steps 1 and 2 as for customers above.
2. Click **Import Contacts**, browse to your contact import file, and click **Open**.
4. Depending on the number of contacts you are importing, the import may take some time. When you get the message "Import complete," click **OK**.

Step 3: Import Your Account History

After you successfully import your customers and contacts, you can import your account history.

1. In PrintSmith Vision, select **Admin > System Monitor**.
2. Click **Account History**. The window now includes an **Import Account History** button on the right.

Note If the **Account History** button is unavailable (grayed out), make sure you set the System Behavior preference as described in “If You Plan to Import Account History” on page 1.




3. Click **Import Account History**, browse to your account history import file, and click **Open**.
4. When you get the message “Import complete,” click **OK**.

Referring to Your printLEADER Account History

After your printLEADER account history is imported into PrintSmith Vision, you can use it as a reference to see what kinds of jobs you previously created for a particular customer.

1. In PrintSmith Vision, select **Admin > External Job Lookup**. The Account Picker window opens.
2. Select the customer whose history you want to check. The Account History window opens.

Account History				
 Get				
Account Name	printLEADER Software	External Ref #	2846	
Date	Document	Job Title	Total	Po #
2/29/2012	100299-1	Notesheets - 200 Notepads / 25 sheets per pad	191.81	
2/29/2012	100299-2	Envelopes - #10 Self Seal Envelope	169.00	
2/29/2012	100299-3	Business Cards - Full Color Business Cards-1 Sided	125.00	
2/17/2012	164697-1	Notesheets - 100 Notepads / 25 sheets per pad	141.61	
2/17/2012	164697-2	Notesheets - 200 Notepads / 25 sheets per pad	191.81	
2/17/2012	164697-3	Envelopes - #10 Self Seal Envelope	169.00	
2/17/2012	164697-4	Business Cards - 1 Set / print 2 sides (current vers	103.75	
2/17/2012	164697-5	Business Cards - Full Color Business Cards-1 Sided	125.00	
Filter: Date <input type="text"/> <input type="text"/>				

3. Do any of the following:
 - Use the **Filter** fields to narrow the list of jobs.
 - To see the list of jobs for another customer, click **Get** and select the customer.
 - To see more detail about a particular job, double-click it. The Data window opens.

Data			
#	1	2,500	Notesheets - 100 Notepads / 25 sheets per pad \$ 141.61
			AB DICK 1 color \$ 43.07
			20# Bond/White \$ 17.93
			5.5000 x 8.5000 Printed 1/Side
			PL CUTTING No Add'l Trim \$ 11.85
			CUTTING & PADDING Pads - 50 @ \$ 21.00
			PAD IN 25's **
			PACKAGING DEPT Pack Carton @ 5M \$ 2.76

OK			