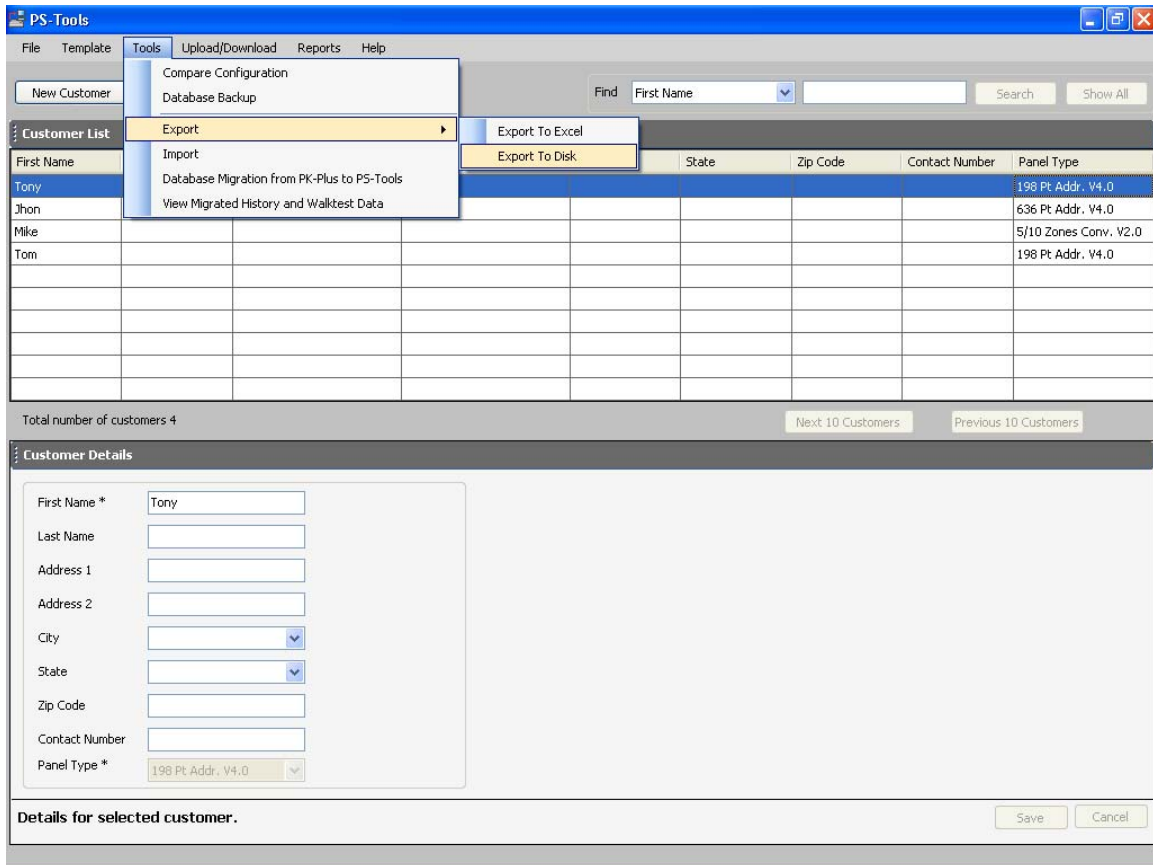


## Steps to obtain all the configured customers into a new installation of PS-Tools

**Step 1:** Click on the customer whose data is required to be ported to a machine containing new PS-Tools and Click on Tools->Export->Export To Disk as shown below.



The screenshot displays the PS-Tools application window. The 'Tools' menu is open, showing options like 'Export To Excel' and 'Export To Disk'. The 'Customer List' table below shows a list of customers, with 'Tony' selected. The 'Customer Details' panel at the bottom shows the details for the selected customer, including fields for First Name, Last Name, Address, City, State, Zip Code, Contact Number, and Panel Type.

First Name	State	Zip Code	Contact Number	Panel Type
Tony				198 Pt Addr. V4.0
John				636 Pt Addr. V4.0
Mike				5/10 Zones Conv. V2.0
Tom				198 Pt Addr. V4.0

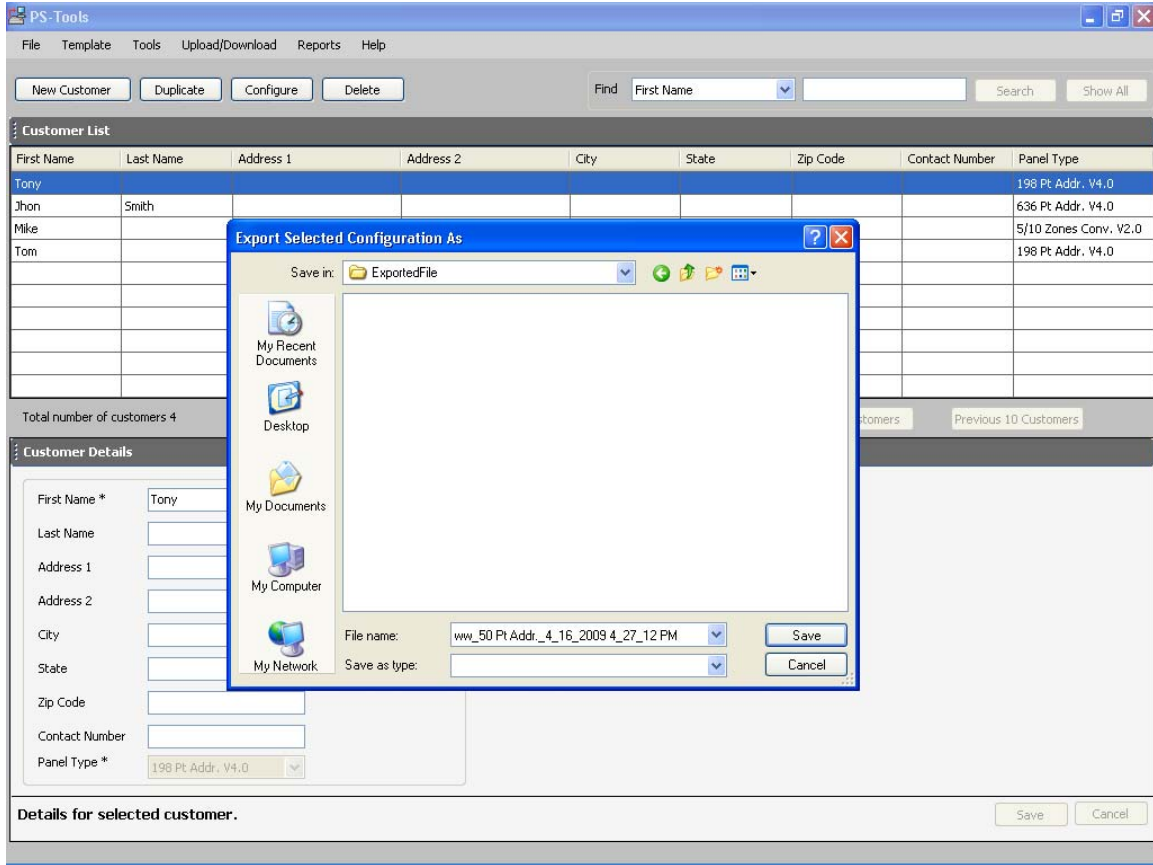
Total number of customers 4      Next 10 Customers      Previous 10 Customers

**Customer Details**

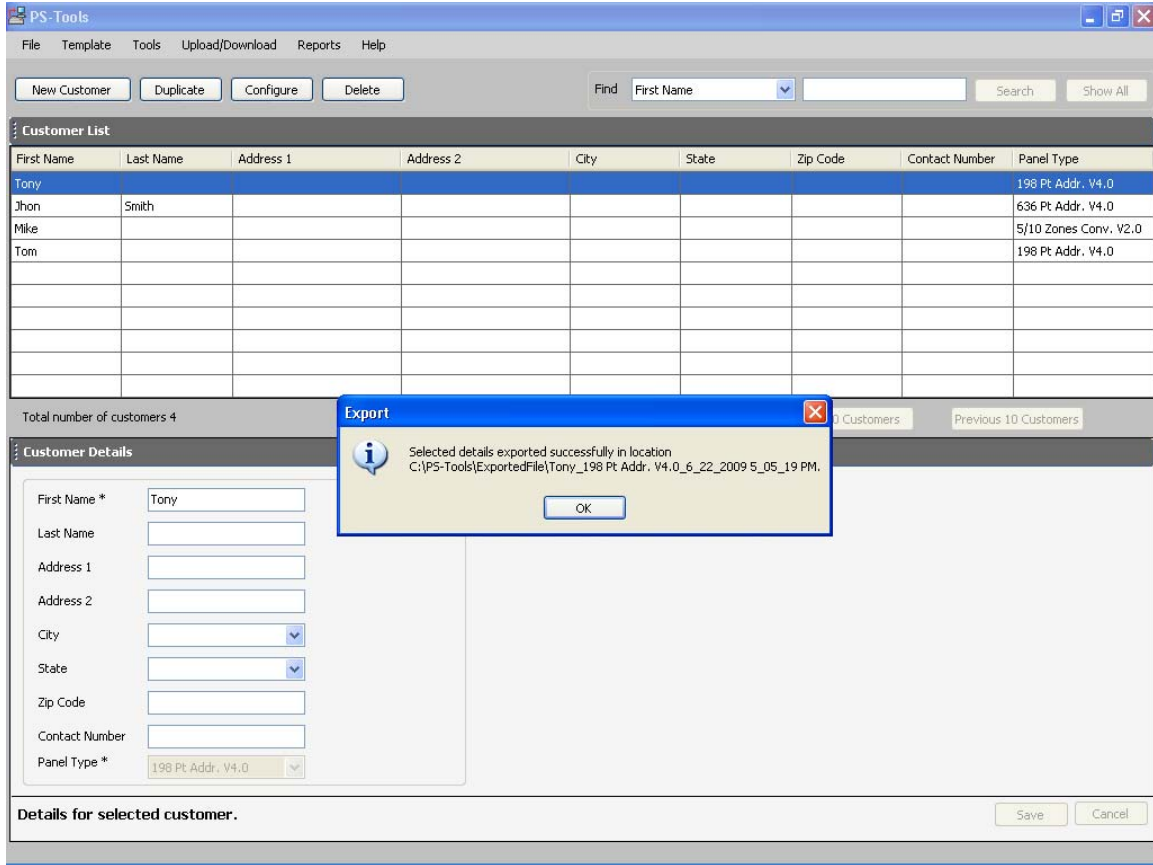
First Name \*   
Last Name   
Address 1   
Address 2   
City   
State   
Zip Code   
Contact Number   
Panel Type \*

Details for selected customer.      Save      Cancel

**Step 2:** A Save Dialog appears as below. Please save the file in a valid location.



**Step 3:** A message pops up telling that the file was exported successfully and also provides the path of the file.



Perform the same sequence of Steps of 1- 3 for every customer you want to be reflected in the new PS-Tools installed. Files you have exported are the files with site information

Now e-mail or transfer the files from this Computer/Laptop to the Computer/Laptop where you have installed the new PS-Tools.

**Step 4:** Open PS-Tools which is installed in a fresh machine.

The screenshot displays the PS-Tools application window. At the top, there is a menu bar with 'File', 'Template', 'Tools', 'Upload/Download', 'Reports', and 'Help'. Below the menu bar, there are buttons for 'New Customer', 'Duplicate', 'Configure', and 'Delete'. A search bar is located to the right of these buttons, with a 'Find' dropdown set to 'First Name', a search input field, and 'Search' and 'Show All' buttons.

The main area is titled 'Customer List' and contains a table with the following columns: First Name, Last Name, Address 1, Address 2, City, State, Zip Code, Contact Number, and Panel Type. The table is currently empty.

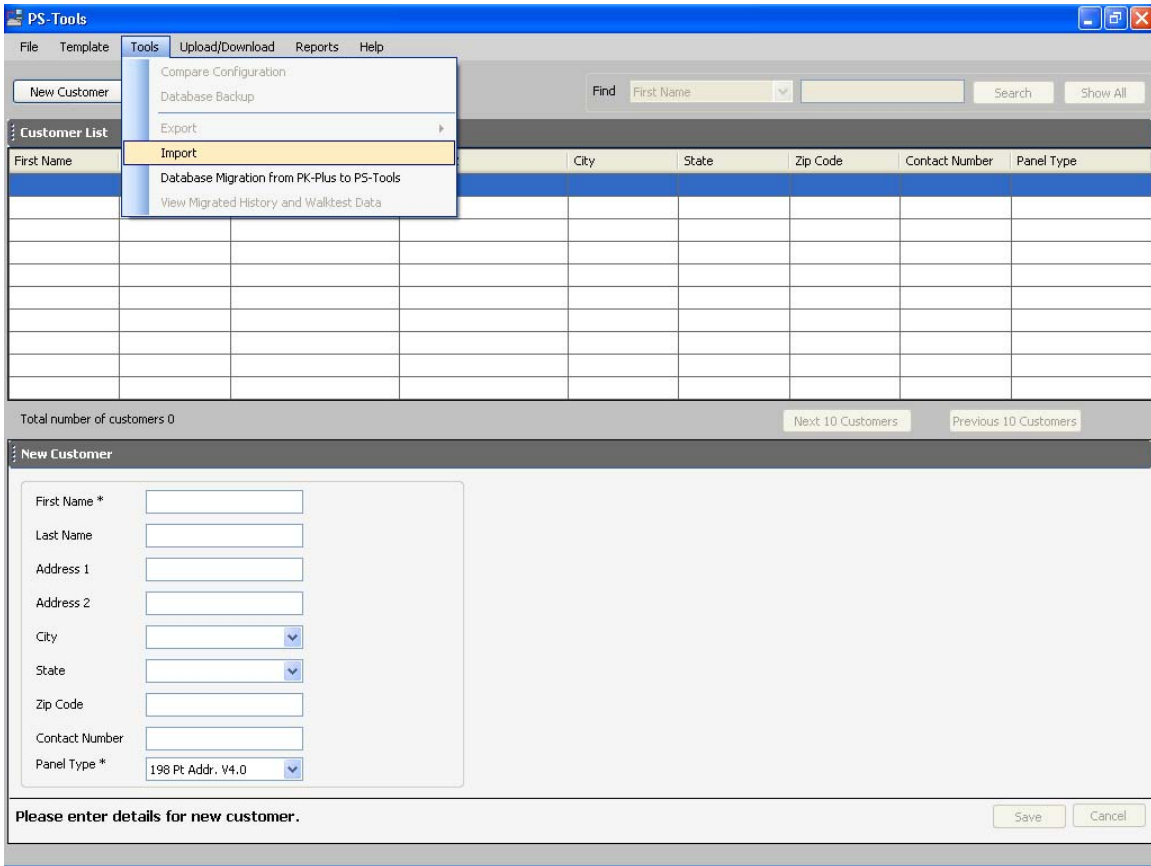
Below the table, it shows 'Total number of customers 0' and two buttons: 'Next 10 Customers' and 'Previous 10 Customers'.

The bottom section is titled 'New Customer' and contains a form with the following fields:

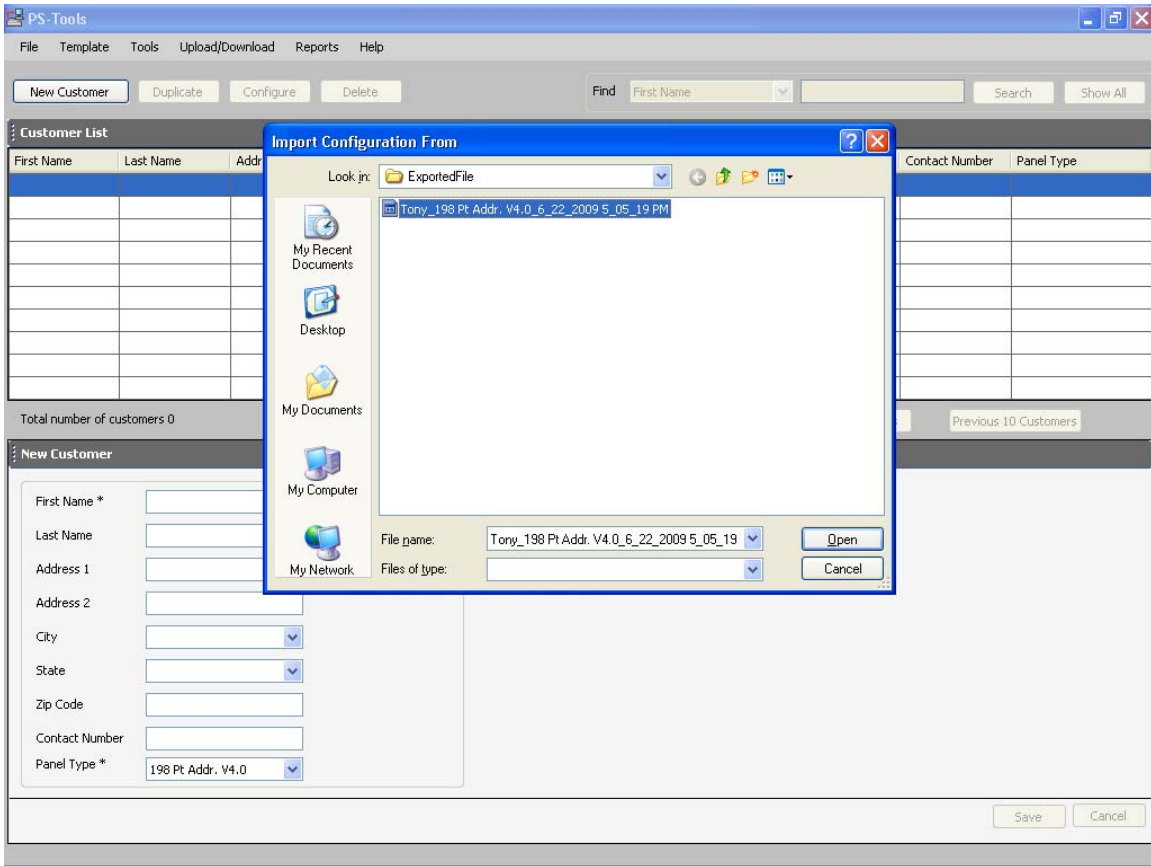
- First Name \* (text input)
- Last Name (text input)
- Address 1 (text input)
- Address 2 (text input)
- City (text input with dropdown arrow)
- State (text input with dropdown arrow)
- Zip Code (text input)
- Contact Number (text input)
- Panel Type \* (dropdown menu, currently showing '198 Pt Addr. V4.0')

At the bottom of the form, there is a message: 'Please enter details for new customer.' and two buttons: 'Save' and 'Cancel'.

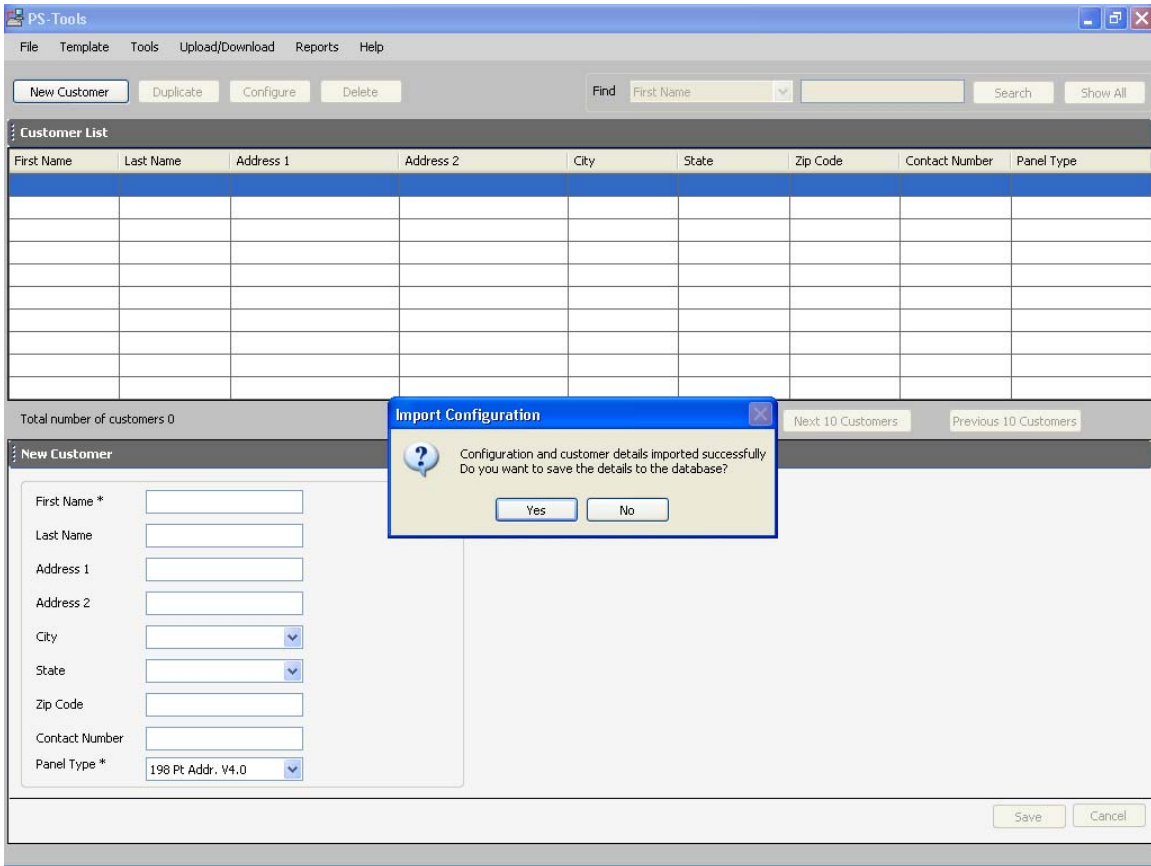
**Step 5:** Click on Tools->Import



**Step 6:** Choose the file that you have transferred to this computer one by one and Press Open button.



**Step 7:** A message pops up informing the status of Import and Click on Yes to add the customer and his configuration in PS-Tools.



**Step 8:** A message is displayed as shown below. The customer and the configuration is stored in the PS-Tools

PS-Tools

File Template Tools Upload/Download Reports Help

New Customer Duplicate Configure Delete

Find First Name Search Show All

First Name	Last Name	Address 1	Address 2	City	State	Zip Code	Contact Number	Panel Type
Tony								198 Pt Addr. V4.0

Total number of customers 1

Next 10 Customers Previous 10 Customers

**Import Configuration**

Customer and configuration details saved in database.

OK

Customer Details

First Name \* Tony

Last Name

Address 1

Address 2

City

State

Zip Code

Contact Number

Panel Type \* 198 Pt Addr. V4.0

Details for selected customer.

Save Cancel

PS-Tools

File Template Tools Upload/Download Reports Help

New Customer Duplicate Configure Delete

Find First Name Search Show All

First Name	Last Name	Address 1	Address 2	City	State	Zip Code	Contact Number	Panel Type
Tony								198 Pt Addr. V4.0

Total number of customers 1

Next 10 Customers Previous 10 Customers

Customer Details

First Name \* Tony

Last Name

Address 1

Address 2

City

State

Zip Code

Contact Number

Panel Type \* 198 Pt Addr. V4.0

Details for selected customer.

Save Cancel