



Data Transfer Wizard

£495

Overview

Changing software supplier will always involve changes to the screens your users are familiar with, and sometimes changes to processes within the company.

To ease the transfer between systems the Dragon2000 Historic Data Transfer Wizard gives the ability to port your historic data into your Dragon2000 system, making the data available for followups and when creating new records.

Feature Summary

- Use MS Excel to compile the data from your own sources
- Import of common CSV data format (which can be saved from Excel and most database systems)
- Simply match the columns in your data to the template provided
- Historic data can be edited in MS Excel or the Dragon2000 Historic Data Transfer Wizard, as you prefer
- Cleanse, update and edit the historic data as you require
- Data can be managed from any workstation, and will be available to all users
- Add the data on day one, or at any time in the future
- Keeps your Dragon2000 database clear of historic transactions whilst making full history available within the system to those who need it
- Repeat visits from customers who were last handled by your previous supplier's system will be recognised by simply their vehicle registration number
- Using a historic customer record in the Service Department will create:
 - a customer within Dragon2000, including all known contact details (unless the same customer already exists within Dragon2000)
 - a vehicle within Dragon2000 including, if known, Registration, Make, Model, Colour, Date registered, Chassis Number and all recorded follow up dates
- Search and view historic records from the Service and Car Sales menus

Screens/User Interface

Historic Data Utility (v1.00H)

Historic Data Utility

Service History - Available when creating new Service Records and to Mailshots

Configure Data To Import

Generate Sample Data

This will generate a sample history file. You can use this as a guide to generate your own actual history data.

The format of your history must be the exact same format as this generated file.

Locate History File...

Once you have populated your history file you can use click Locate History File, so this application can use it.

Import Data

View/Edit History File...

Review your history data one last time before Dragon2000 imports it.

Records in Data to Import **10**

Import Data into Dragon2000

You can amend your imported history by clicking "View/Edit Imported Data" once imported.

Any fields in an incorrect format will arrive blank e.g. date fields containing text, or an invalid date

Review and Edit Imported Data

View/Edit Imported Data

View the History records actually available to Dragon2000.

You can remove entries or edit the details on all records.

You can also delete all records from here if you wish to repeat the import.

Last Import **Never Imported**

Records in Imported Data **10**

Dragon2000 - Workshop Jobs (v9.31)

Main Menu | Contacts | New Service | New Booking | New Estimate | Calendar | Oil Stock | LOOKUP | Lookup Reg | Job Cards | Reports | Utilities | Show All | Find (F3)

Service History - (20 Records) | Dragon2000

Comments Summary

Service Estimates - (1 Records)
 Service Bookings - (9 Records)
 Services In Progress - (74 Records)
 Completed Services - (9,535 Records)
 Stages In Progress - (1 Record)

Service History - (20 Records)

Service History - 1 Records (Filter applied)

Service No	Registration	Car Make	Car Model	Customer	Brief Description	Collected
	A123XYZ	Ford	Fiesta Zetec S 1.6 Tdci			

Find

Search only for company (F5) | Dragon2000

Please enter the column you wish to search followed by the value you are looking for.

Search for: (F4) Customer Name

Contains: smith

Buttons: Find, Advanced, << More, Show All (F2), Hide, Simple Mode

ServiceHistory (v1.00H)

Back | Save | Delete

Client Details

Full Name: Mr John Smith

Address 1: 1 The Street

Address 2: Townsville

Address 3: County Place

Address 4:

Post Code: AB12 3YZ

Contact Name: John

Contact Category:

Birth Day:

Home Phone: 01234 567890

Work Phone:

Mobile Phone: 05800 111222

Email:

Last Call Date:

Last Contact Date:

Last Letter Date:

Last Label Date:

Last SMS Date:

Service Details

Service Number:

Booking Number:

Booking Date:

Date Added:

Brief Description:

Internal:

Salesman:

Collected Date:

Invoice Number:

Invoice Date:

Vehicle Details

Make: Ford

Model: Fiesta Zetec S 1.6 Tdci

Registration No: A123XYZ

Colour:

Date Registered:

MOT Due Date:

Service Due Date:

Cambelt Due Date:

Cambelt Due Mileage:

Warranty Due Date:

Inspection Due Date:

Calibration Due Date:

Chassis Number: AAABBB11223334455

Imported By: dragon on 'WOODCOTE' at 26/11/2009 11:21:40