

SUMMIT SOFTWARE SOLUTIONS



ACHIEVE PEAK PERFORMANCE  
IN YOUR BUSINESS!

# Auto Importer

TRAINING AND REFERENCE MANUAL

# Setting Up Auto Importer

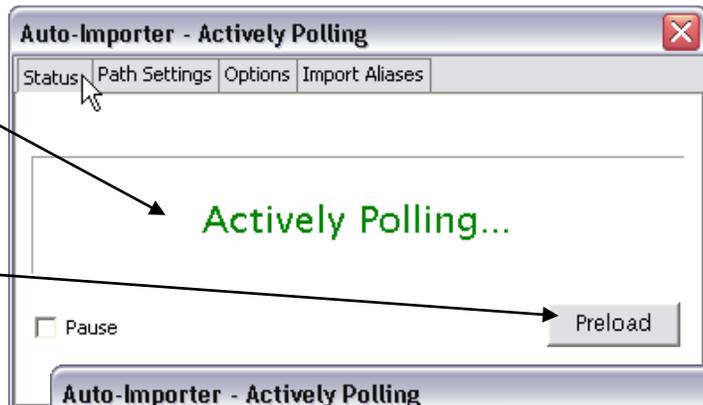
The Auto Importer Program imports from the estimating system into the Summit management programs.

It runs in the bottom right of the server and is usually installed with the DBServer program.



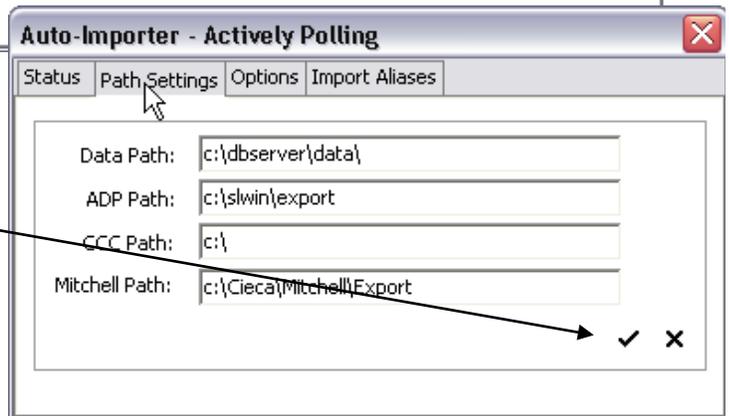
Right click on the Auto Importer Icon and select View to see the status, change options, or setup Auto Importer.

The Auto Importer will say Actively Polling in the Status screen unless it is paused, or currently being edited.



Use the Preload button to load all files currently in the export folder into Summit.

Use the Path Settings tab to set up your data and estimate exporting paths. These paths should be local drive paths.



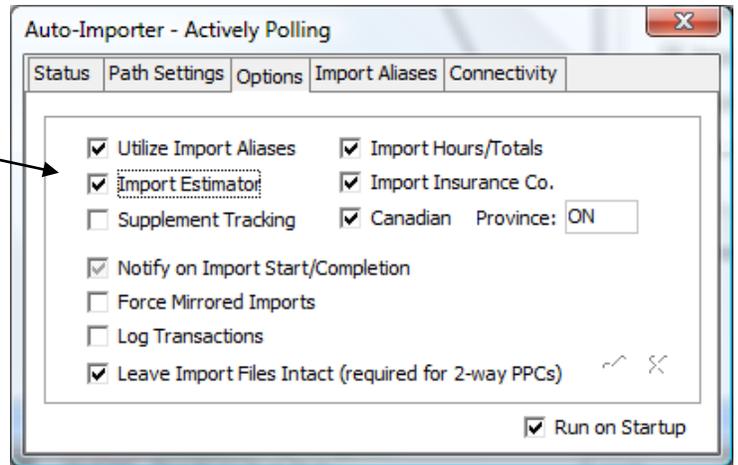
When done setting paths click the "check" to save changes.

Double clicking on any path line will take you to the Browse menu shown to the right. You can choose paths from here that match the export path of your estimating systems.



These options can be set to your preference:

You will want to discuss these options with your

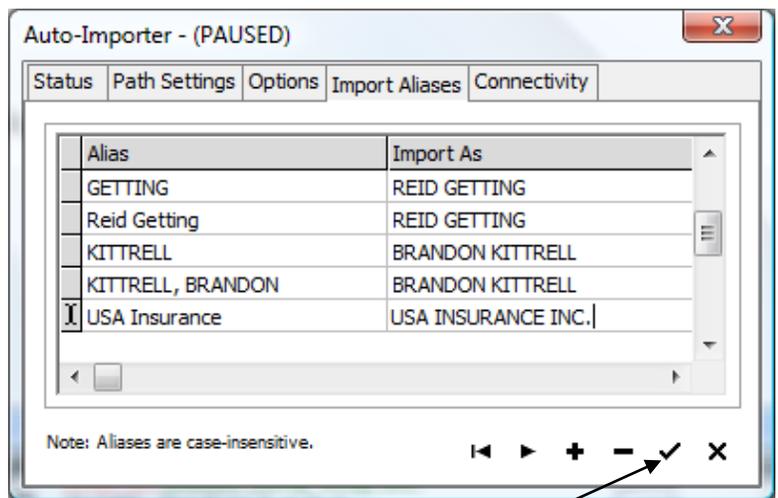


The Import Aliases tab allows you to convert data (Estimators Names and Insurance Co. Only) as it is imported in to the Summit Estimates tab.

In the "Alias" column, type in the name of the Estimator or Insurance Co. **exactly** as it appears in any of your estimating systems.

In the "Import As" tab type in the name of the Estimator or Insurance Co. **exactly** as you would like it to import in to Summit. (This should **exactly** match the way you have it typed in Administration.)

Note: Import Alias data is all case-sensitive.



One you have made your changes always save by clicking the "check mark."

After all your changes are made confirm the Auto Importer displays "Actively Polling..." in the Status tab.