



Exporting PAS Client Data for Embedded Mapping/Importing into QL2

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Exporting Client Data From PAS

Important Notes

You must have PAS version **5.00.0135** or later for the Export feature to work with QL2. We are happy to provide that to you on request.

The Export feature will selectively export client data and client items. It does not export PAS Worksheets or Created Reports

Exporting

Open PAS and proceed to the Client window for the client you want to export.

From the Title screen...

- Client menu, Edit
- Type the client's last name into the Search field.
- Use the column header Sort/Find feature and/or scroll down, locate, and open the Client record
- Click the Export button to open the Export Client Item window.

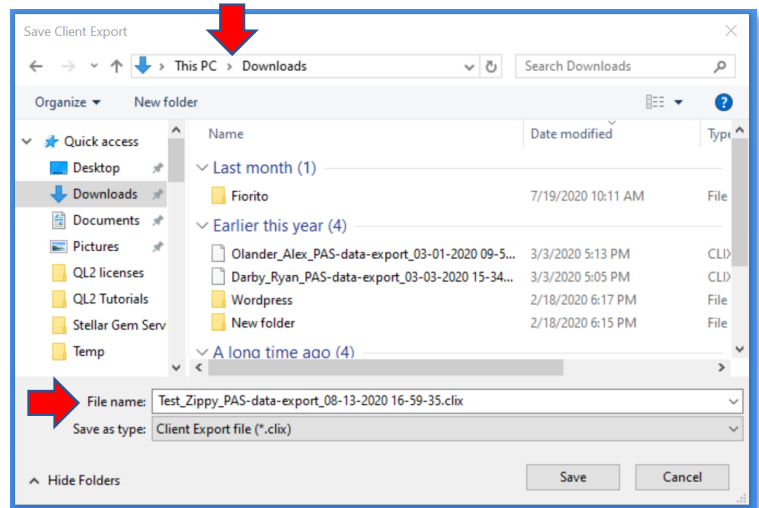
The screenshot shows the Quantum Leap - PAS software interface. The main window is titled "Client - Mr. Zippy Test" and displays a list of clients in a table. The "Export..." button is highlighted with a red arrow. The "Export Client & Item Information" dialog box is open, showing a table of items to be exported. The table has columns for "Creation / Last Edit", "Summary Desc.", "Weight", "Total", and "Description". The items listed are:

Creation / Last Edit	Summary Desc.	Weight	Total	Description
9 - 5/27/2007 - 2/18/2020	Engagement Ring	4.56 gms	\$22,500.00	One lady's engagement ring set in the cl
13 - 8/9/2019 - 9/23/2019	Ring	0.00 gms	\$3,456.00	The diamond matches the data provided in GIA n
16 - 9/30/2019 - 8/15/2020	Ring	0.00 gms	\$2,342.00	The diamond matches the data provided in GIA n

The "Export" button in the dialog box is highlighted with a red arrow.

- The window opens with all items selected - uncheck those items you do NOT want to export
- Click the Export button to proceed

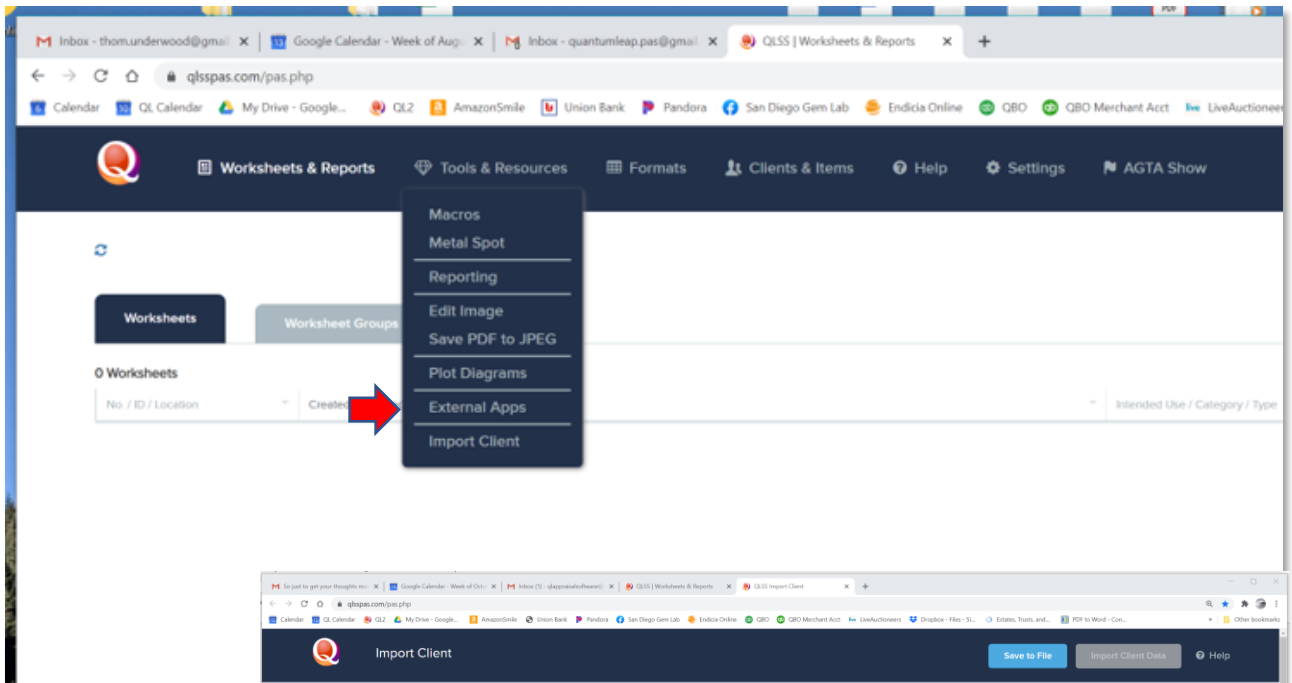
- ‘Save as’ window will open...
- Set your ‘Save as’ path and make sure you note where you set it because the next step is uploading the file to QL2. *Note: There is no need to rename the file as once you are done importing the data it can be deleted.*
- Click on the Save button (be patient)
- Close out of PAS



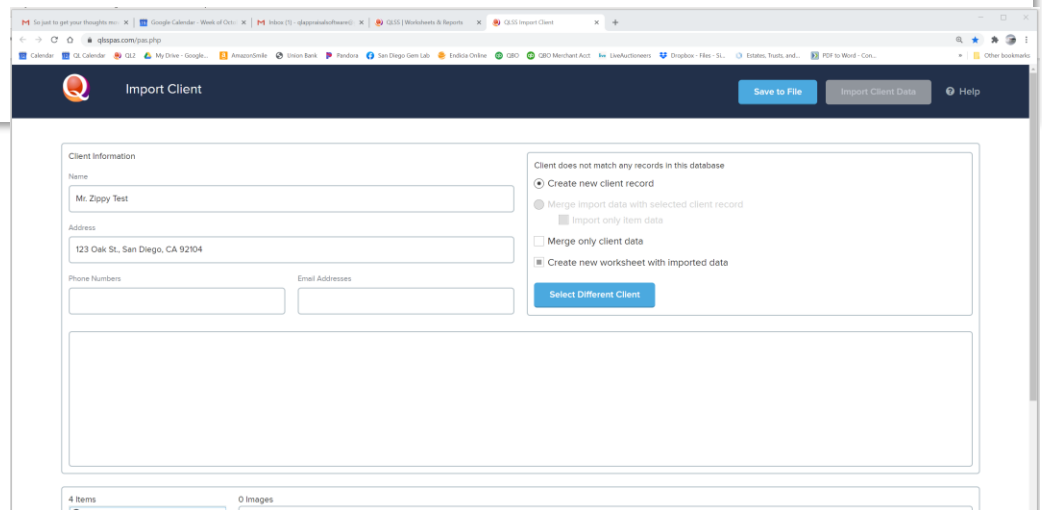
Importing Client Data File From PAS

Importing

- Log into QL2
- At the opening window click on the Tools and Resources menu and choose Import Client to open the Client window.

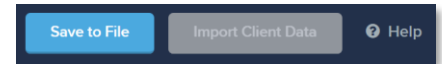


- Click on the Select Import File button and navigate to the file you exported from PAS and choose it (do you remember where you placed it?).



Import Client Window

Note: If for some reason you cannot finish the mapping process at one sitting, the Save to File button (top right) will download a file that contains your progress to that point (the default is the Download folder). To resume mapping, simply import the saved file, just as you did the original (see above).



Client Data

Client data and Options are shown in the top sections of the window.

New Client (to QL2)

- The right panel defaults to 'Create new Client record'.

Merge with Existing Client

- If the client data is already in QL2 the 'Merge import data with a client record' bullet will be available to activate.
 - 'Import only the item data' (no client data) will import only item data.
 - 'Merge only client data' will import only the client data (not any item data).

Create new worksheet with imported data

- Create new worksheet will, when imported, open a new worksheet and merge all the client and item data. The worksheet will need to be reviewed to assure worksheet settings are correct to the intended use of the import (e.g. appropriate template, Insurance, Estate, or...)

Merge with Different Client

If you want to merge the item data with an entirely different client (from the one you exported in PAS) click on the 'Select Different Client' button to open the Select Client window.

- Click in the Select Client search field and type the client's last name.
- Use the column header Sort/Find feature and/or scroll down, locate, and open the Client record

If merging data with an existing client, once the client is chosen, the client data will be displayed in the middle window.

Embedded Mapping of PAS Data to QL2 Data

Mapping refers primarily to aligning **Components** and **Details** (e.g. Cut, Finish, etc.) that exist in your PAS to those that exist in QL2 but also includes **Other Configurable Values**. Most often, with many Details, there is no difference between the two and no mapping is necessary. When there is a difference (e.g. Proportions vs. Cut), even the slightest difference (e.g. ct. vs ct), then mapping is necessary to import the Item. When QL2 cannot find a match for a Component, or a Detail in a component it will display a yellow triangle. The yellow triangle is removed once you have mapped to the corresponding Detail.

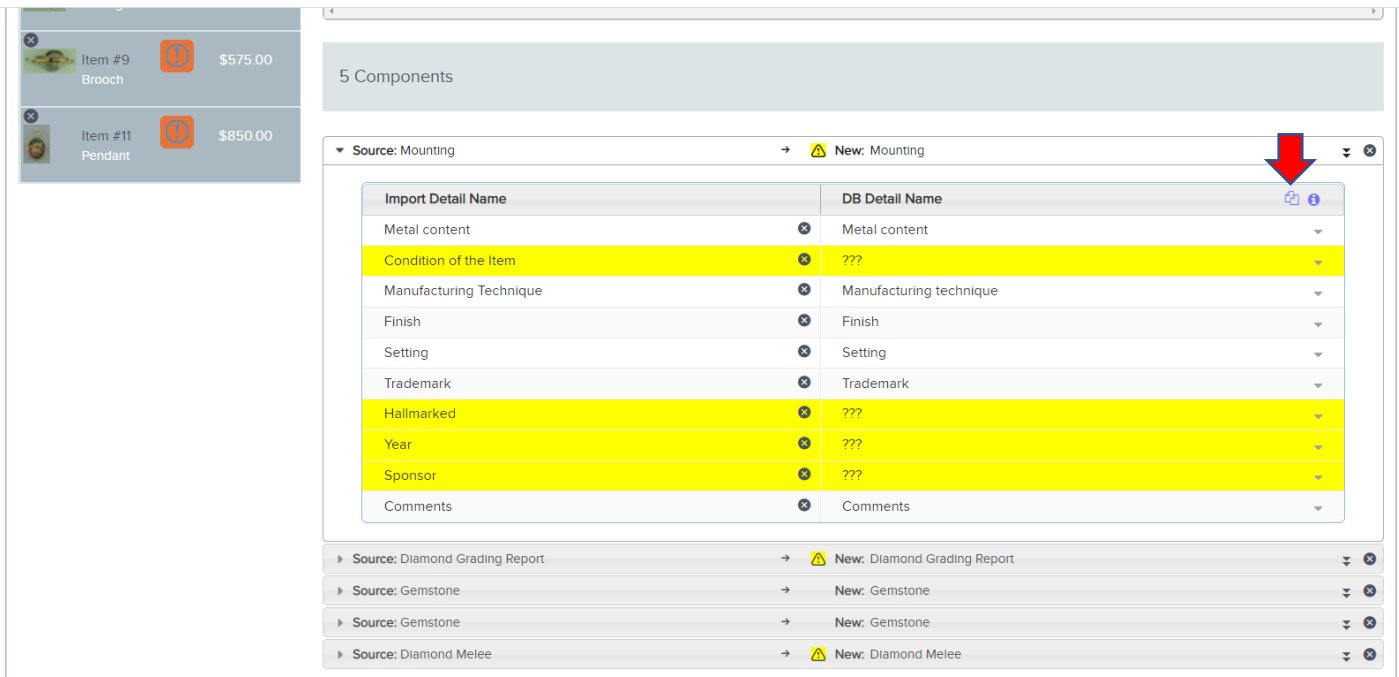
Note: Mapping is saved as you proceed and can be done over a series of imports. Over time, as you import more Clients/Items, there will be fewer Details needing mapping. Ultimately no mapping will be necessary.

Mapping

In the Item section you will find all the items you chose to import for that client listed down the left side. The red symbol in an Item indicates that mapping needs to be done and when in Item Image is too large. Clicking on an item will display the Components to the right. Yellow triangles indicate that the Component has content that needs mapping. Clicking directly on the yellow triangle at the center of the Component bar will open the Component and display the Detail(s) that need to be mapped.

First click on the Copy icon to put the Component in memory.

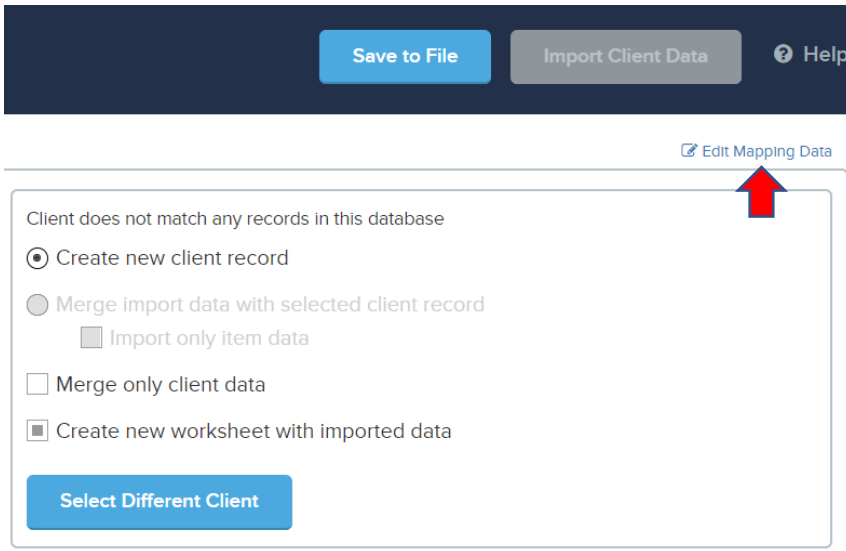
Note: More than one component's data can be put in memory at the same time.



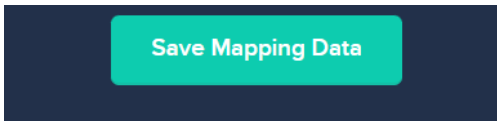
The screenshot displays the software interface for mapping data. On the left, a sidebar lists two items: 'Item #9 Brooch' priced at \$575.00 and 'Item #11 Pendant' priced at \$850.00. The main area shows '5 Components' for the selected item. A table titled 'Source: Mounting' is displayed, comparing 'Import Detail Name' with 'DB Detail Name'. A red arrow points to a copy icon in the top right corner of the table. Below the table, there are four rows for other components: 'Diamond Grading Report', 'Gemstone', 'Gemstone', and 'Diamond Melee', each with a 'New' status and a copy icon.

Import Detail Name	DB Detail Name
Metal content	Metal content
Condition of the Item	???
Manufacturing Technique	Manufacturing technique
Finish	Finish
Setting	Setting
Trademark	Trademark
Hallmarked	???
Year	???
Sponsor	???
Comments	Comments

Next scroll to the top of the window and click on 'Edit Mapping Data'...



...then 'Open Notepad'.



This will open the Notepad displaying all the Details in the Component and which need mapping (displayed in red).

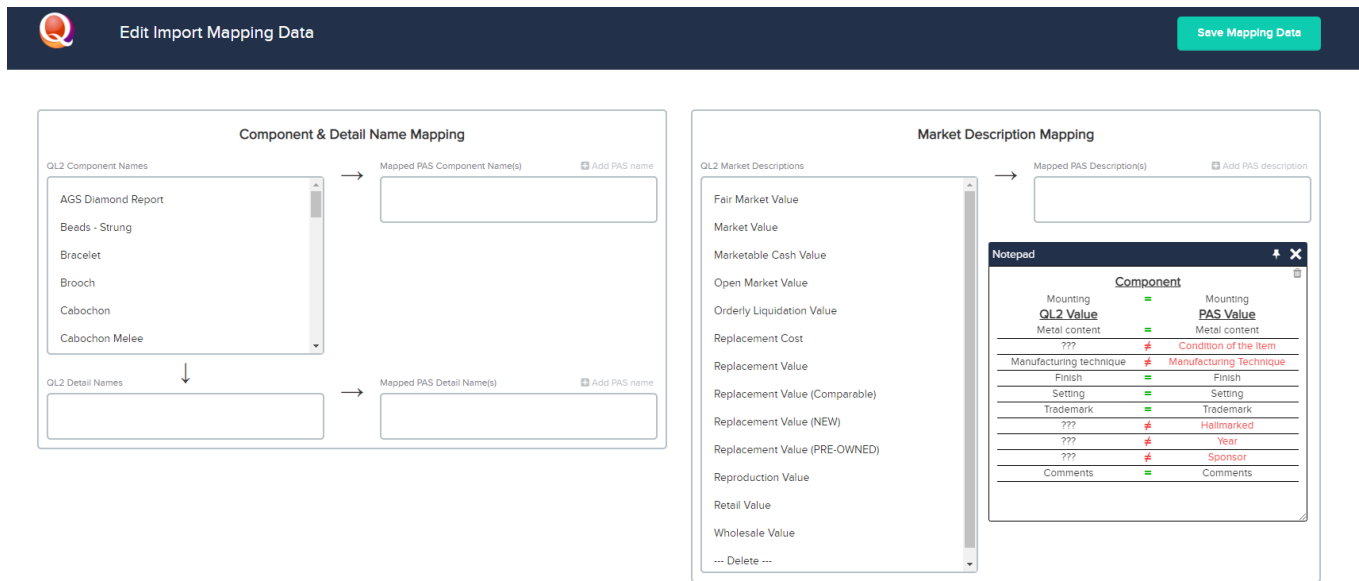
The screenshot shows a Notepad window with a table comparing 'Component' and 'PAS Value' columns. The table has two columns: 'Component' and 'PAS Value'. The rows are separated by horizontal lines. The 'PAS Value' column contains red text for items that need mapping.

Component		PAS Value
Mounting	=	Mounting
QL2 Value	=	PAS Value
Metal content	=	Metal content
???	≠	Condition of the Item
Manufacturing technique	≠	Manufacturing Technique
Finish	=	Finish
Setting	=	Setting
Trademark	=	Trademark
???	≠	Hallmarked
???	≠	Year
???	≠	Sponsor
Comments	=	Comments

The content of the Notepad is a visual guide to your next step, actual mapping of the Details. In the example above, in the PAS Value column, Condition, Manufacturing Technique, Hallmarked, Year, and Sponsor are highlighted in RED and need to be mapped. Mapping is done one Component at a time and the Notepad provides the necessary data to know which Details need mapping in that Component.

Your actual onscreen layout may differ from the images below depending on your screen resolution; however, the columns in the mapping boxes are the same.

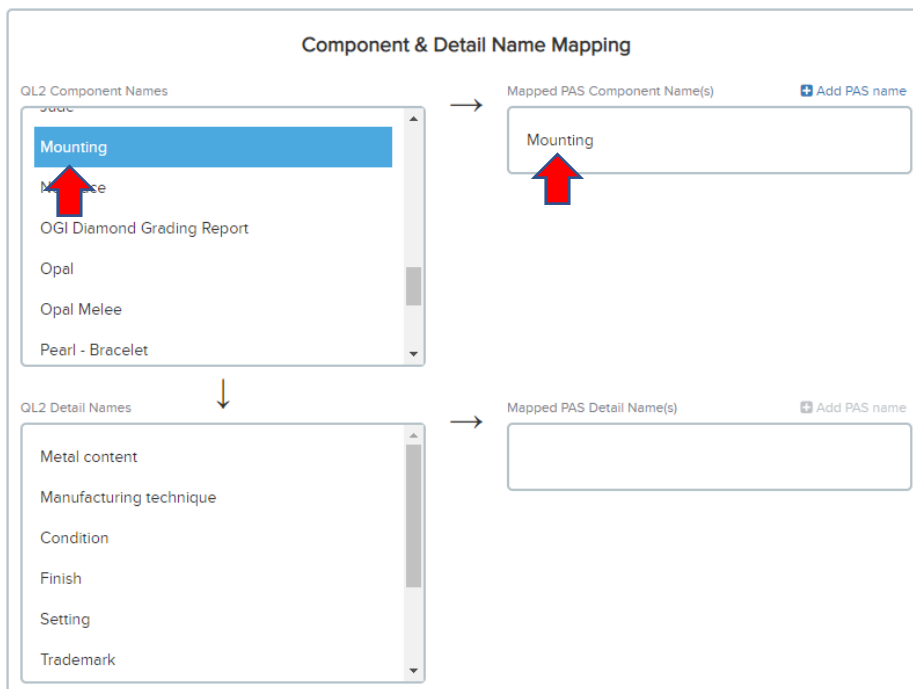
Note: The Notepad can be moved to access any hidden part of the screen and can be expanded to show all content (drag the bottom right corner).



Component and Detail mapping

Component

The left column lists the components you currently have in QL2. Choose a Component in the QL2 Component Names column (e.g., Mounting). The matching Component from PAS will appear in the right column 'Mapped PAS Component Name(s)' (e.g., Mounting).



Detail

A reminder - you must only map the Details found in rows highlighted in **RED** in the Notepad, the others (black) matched and are already mapped.

To successfully map the Detail names of QL2 with PAS they **MUST** have the exact word structure (e.g., upper/lower case, punctuation, etc.). To assist you and make sure the structure is exact we have provided a convenient copy/paste function.

The screenshot displays two main mapping windows: 'Component & Detail Name Mapping' and 'Market Description Mapping'. The 'Component & Detail Name Mapping' window has two lists: 'QL2 Component Names' (Mounting, Necklace, OGI Diamond Grading Report, Opal, Opal Melee, Pearl - Bracelet) and 'Mapped PAS Component Name(s)' (Mounting). Below these are 'QL2 Detail Names' (Metal content, Manufacturing technique, Condition, Finish, Setting, Trademark) and 'Mapped PAS Detail Name(s)' (Manufacturing Technique). The 'Market Description Mapping' window shows a list of market descriptions (Fair Market Value, Market Value, etc.) and 'Mapped PAS Description(s)'. An overlaid Notepad window shows a comparison table:

Component	QL2 Value	PAS Value
Mounting	=	Mounting
Metal content	=	Metal content
???	≠	Condition of the Item
Manufacturing technique	≠	Manufacturing Technique
Finish	=	Finish
Setting	=	Setting
Trademark	=	Trademark
???	≠	Hallmarked
???	≠	Year
???	≠	Sponsor
Comments	=	Comments

(1) To copy, double click on the RED Detail (e.g., Manufacturing Technique) to highlight it then use the standard command 'Ctrl + C' (or right click and choose copy) to copy.

(2) Click on the corresponding QL Detail name in the 'Component and Detail Names' list.

(3) Click on 'Add PAS name', then use the standard command 'Ctrl +V' (or right click and choose paste) to paste in the PAS Detail name (e.g., Manufacturing Technique).

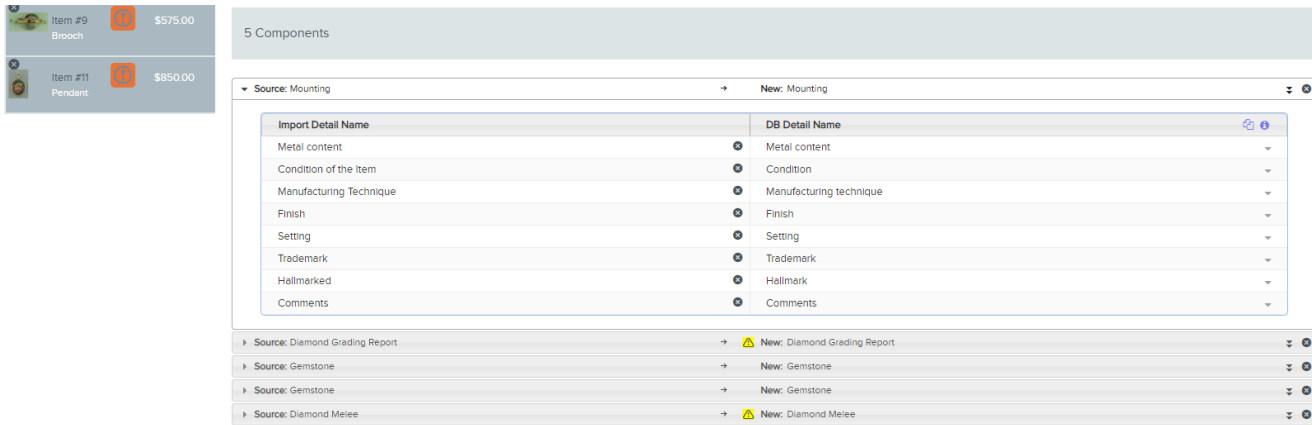
Repeat the above step for each PAS Detail value listed in RED in the Notepad.

If in Notepad, you see '???' in the QL2 Value column (along with a RED PAS value to the right) it simply means the mapping interface is unable to auto associate the PAS value with one in QL2. Proceed as above, manually choosing the corresponding QL2 Detail value.

There are instances where there are no corresponding Detail values in QL2 and you do NOT want/need the PAS value mapped. In our example above Year and Sponsor are in RED and must be mapped but there is no QL2 Detail name for Year or Sponsor. To address this proceed as above and map to '- Delete -' which is found at the bottom of the 'QL2 Detail Names' column.

There may also be instances where there are no corresponding Detail values in QL2 and you find the entry '--- EMPTY STRING ---'. This indicates that there was no data entered in this field in PAS. Map '--- EMPTY STRING ---' to '- Delete -' which is found at the bottom of the 'QL2 Detail Names' column.

When all the Detail values have been mapped for that component (e.g., Mounting) scroll up and click on the Save Mapping Data button. You are returned to the Import Client interface where you can see that all the Details in the Component are now mapped (no yellow warning)



Repeat the mapping steps above for each Component that has a yellow warning.

Repeat the mapping steps above for the other categories as well:

- Market Level Mapping
- Market Description Mapping
- Other Cost Mapping
- User Name Mapping

The Components you see listed onscreen are the ones contained in the Item you are currently mapping. Consequently, not all components that are contained in PAS will be present with any given Item. As you import more Clients and Items you will be presented with additional Components that are yet to be mapped (notified with the yellow warning). By making the effort to map Components as they appear, over time all Components will be mapped, and imports will become seamless. No mapping will be required; just import the exported file from PAS, merge client and item data into QL2, review and print.

Photos

Clicking on an item will present that item's photo(s) (if they exist) and data to the right and make it available for editing/mapping.

5 Items

- Item #2 Ring \$4,336.94
- Item #3 Ring \$16,297.19
- Item #4 Ring \$12,000.00
- Item #5 Engagement Ring \$25,500.00
- Item #6 Watch \$4,500.00

1 Image

2 Components

Source: Mounting → New: Mounting

Source: Diamond Melee → New: Diamond Melee

Additional Configurable Values

Item Value Description Market Level

Additional Market Description 1

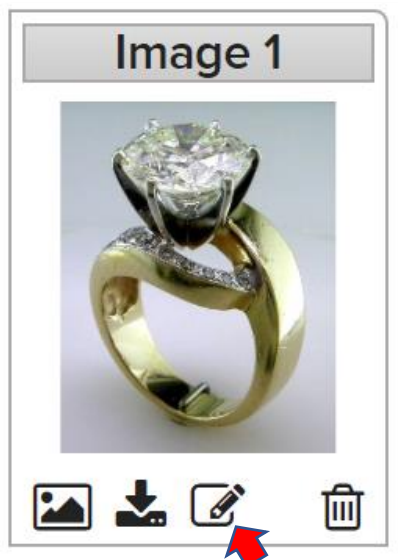
Additional Market Description 2

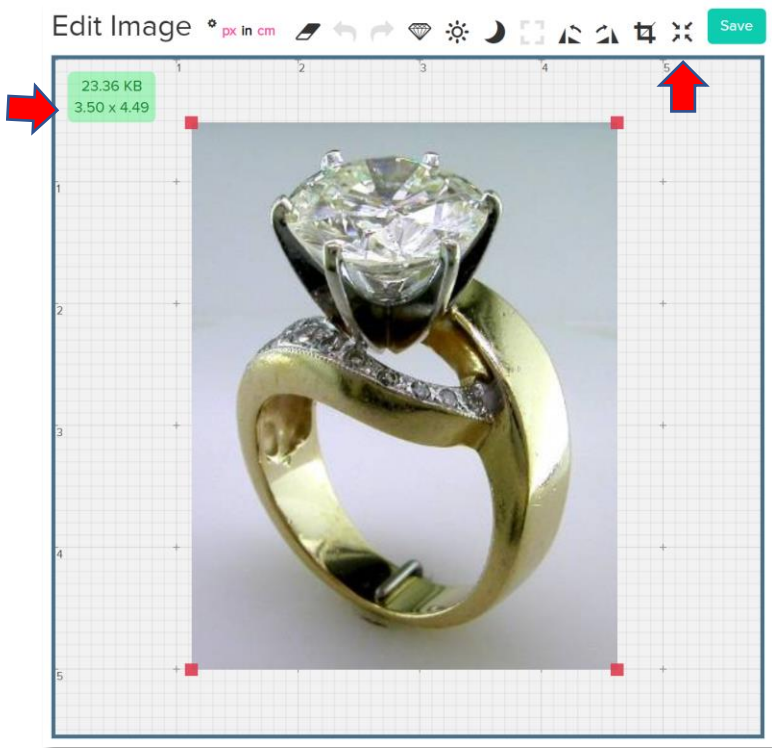
Additional Costs Edit Other Mounting Costs List

Setting \$110.00

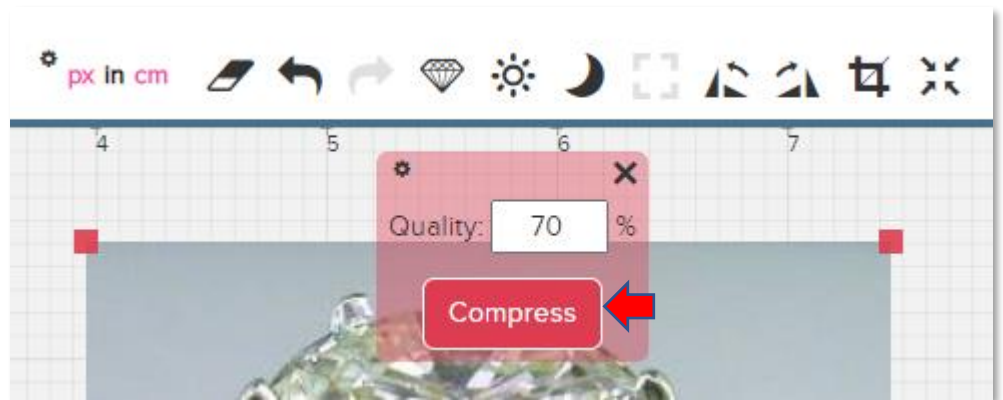
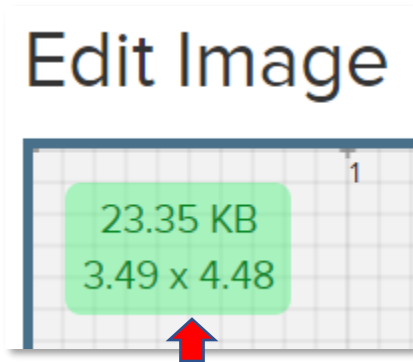
Editing Photo(s)

Photos need to be a reasonable size to upload in QL2 (the cloud), but if they are not, we have provided basic photo editing tools to help. Click on the “Edit” button to open the Photo Edit popup.





Edit Image includes tools to size, sharpen, brighten, darken, rotate, crop, and compress your image. Of these, most important to importing are **sizing** and **compressing**.



Start by entering a width measurement for your image (this will be reduced further when the report is created so to retain resolution, we suggest anywhere from 3 to 6 inches) and press enter. The height will automatically reduce to scale. From left to right (e.g., sharpen, etc.) edit the image as desired. Finish by clicking on compress. 70% seems to work well but you can experiment. The goal is to get the image size under 80 KB wherein the Measurements box will turn green.

Once done, click on the Save button to return to the mapping window. You will notice the yellow warning is now gone from the image.