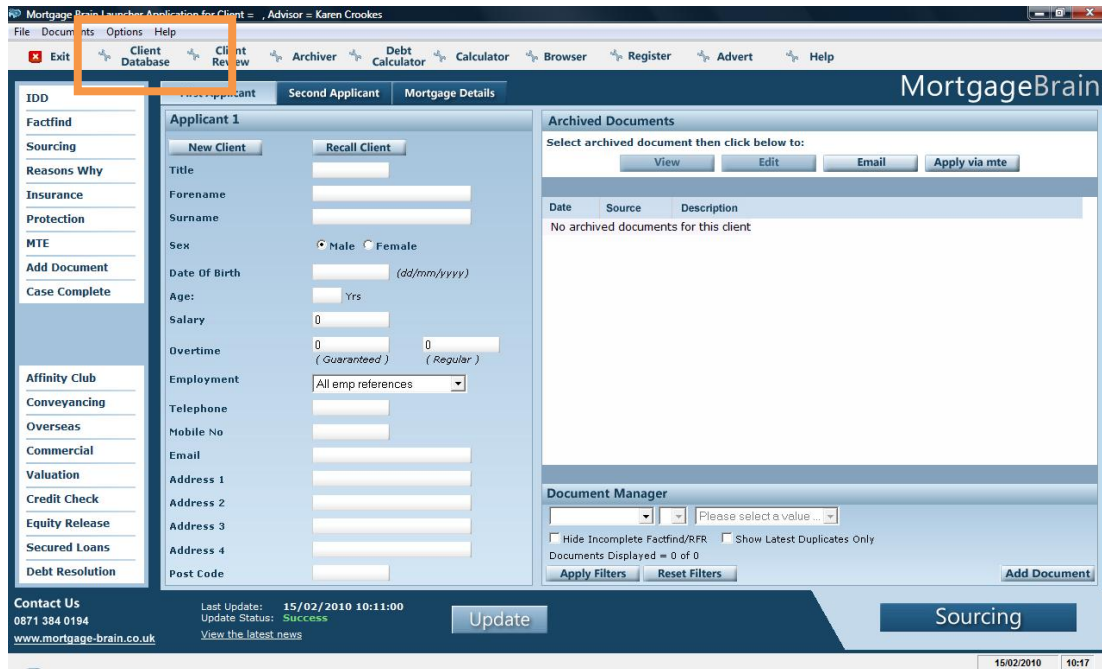




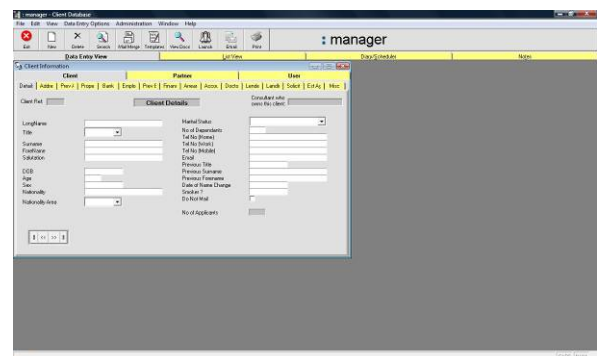
Importing Client Data from Trigold

ALL NEW MortgageBrain has an import wizard that makes transferring your clients from Trigold very quick and easy. Simply follow the steps below...

- Open **ALL NEW** MortgageBrain and from the tool bar menu, select **Client Database**.

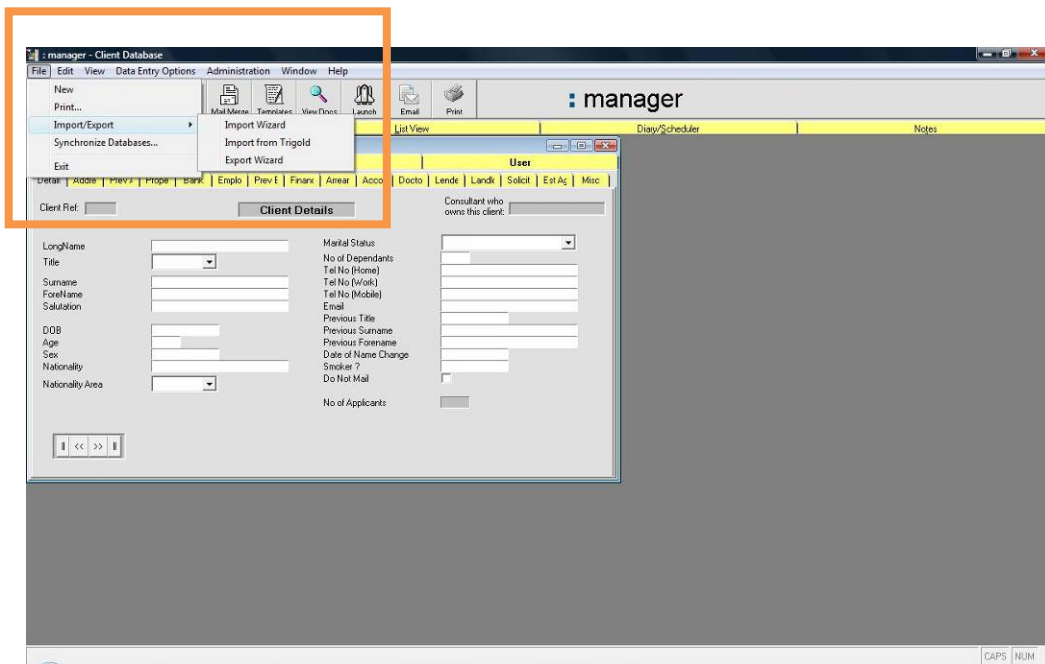


- By selecting **Client Database**, this will present you with the screen on the left below. Select **Enter New Client Details** to open your client database within MortgageBrain. The screen on the right shows the database.



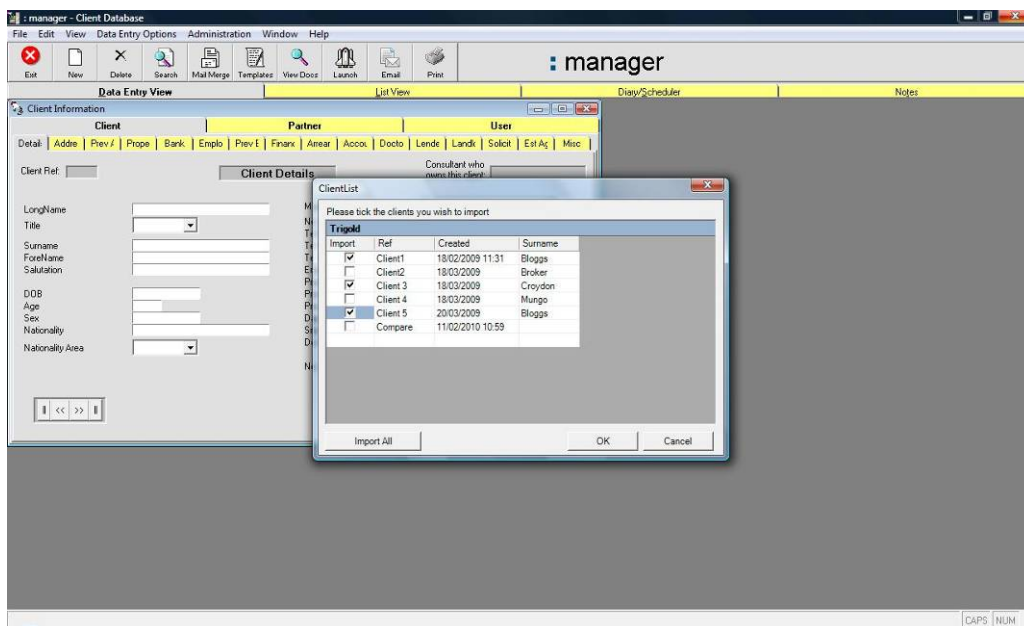


- From the database, select **File > Import/Export > Import from Trigold**.



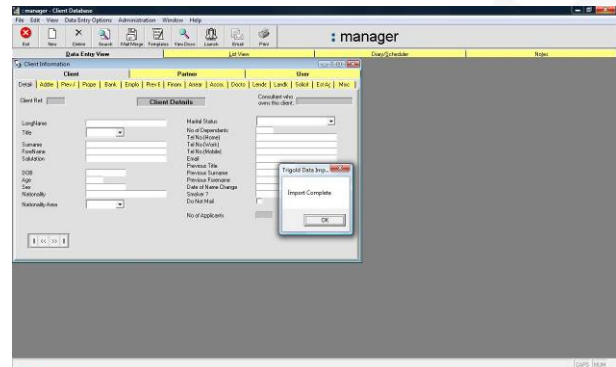
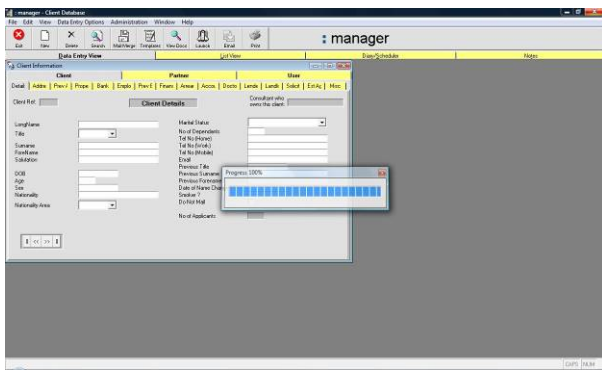
- The screen will display a list of all the clients currently stored in Trigold. Checkboxes are available next to each client name to allow the ability to individually select clients that are to be imported. Alternatively, by selecting the **Import All** button, this will automatically import all clients from Trigold to Mortgage Brain.

NOTE: The import facility will transfer all client data automatically, but will not transfer documentation.

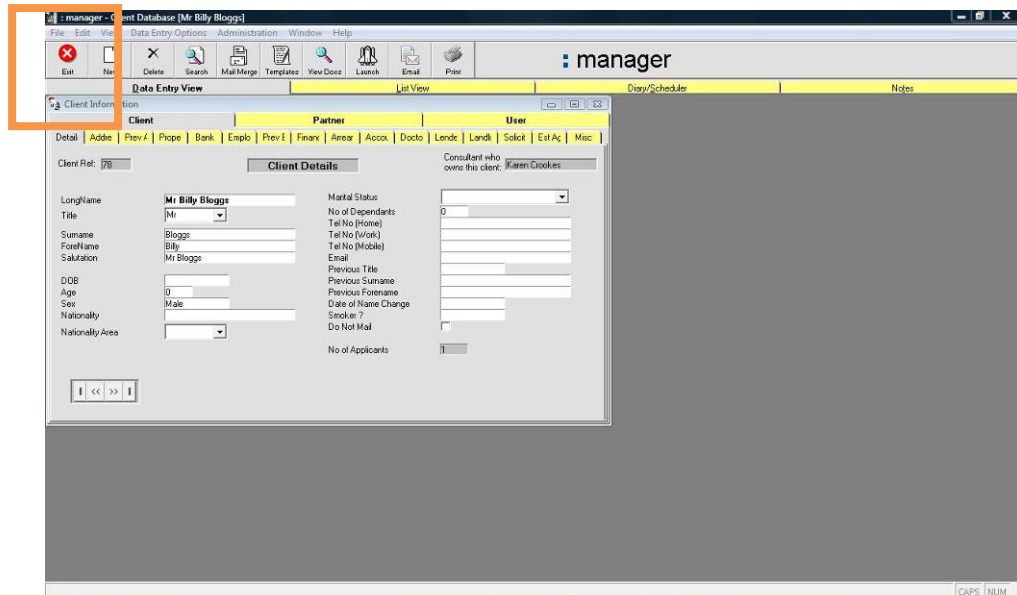




- As the client data is being transferred, you will see a progress bar on the screen. Once all the clients have been imported, this is confirmed by a pop up box as shown.



- The name of the first client imported will automatically appear in the client database as shown below. Use the **Exit** button to close the database down and return to the **ALL NEW** MortgageBrain launch screen.





- The remaining clients that have been imported can easily be found by clicking **Recall Client** from the launch screen. This will automatically display a list of clients.
- To display a recently imported client, simply click on the required client and click **Recall Client**. The client data will then be displayed in the launch screen and can be pre-populated into **Sourcing**. All future documentation produced for the client will automatically be stored in the launch screen, below, against the client name.

