

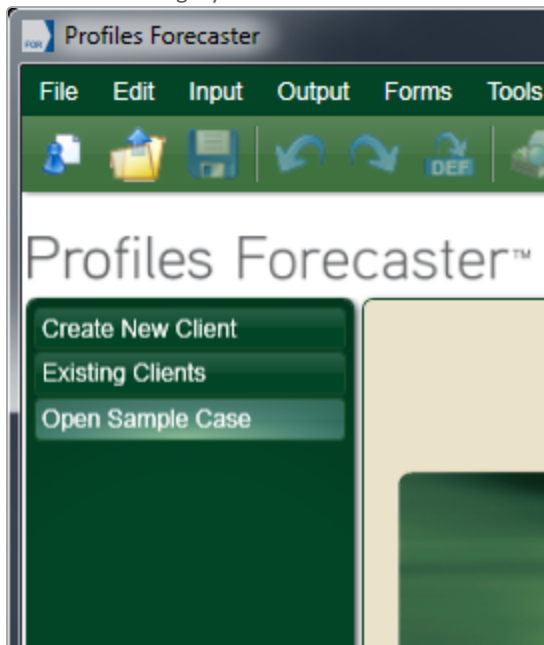
Data migration to Profiles™ online

The purpose of this guide is to show how you can transfer your cases from the desktop version of Profiles™ Forecaster to the online version Profiles™ Forecaster. The value of doing this will be addressed on the opposite page. To transfer your cases, follow these steps:

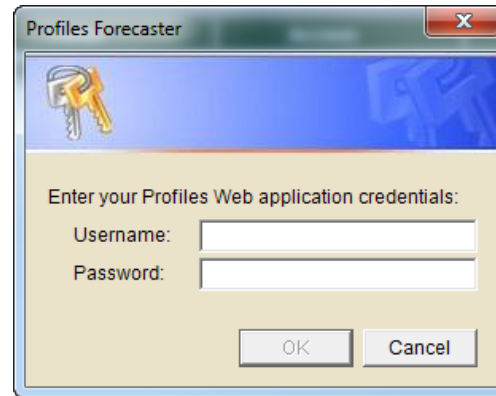
Data migration

Follow these steps to migrate client and case data from your desktop version of Profiles™.

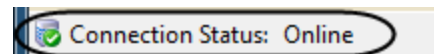
1. From the **Welcome** screen, open the **Existing Clients** category.



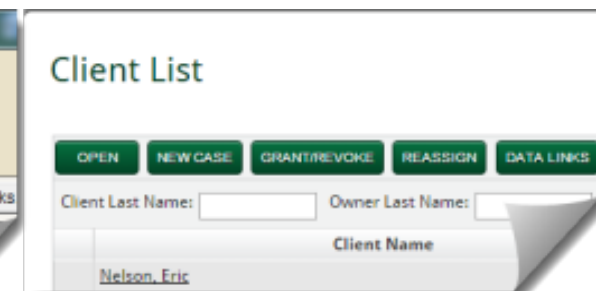
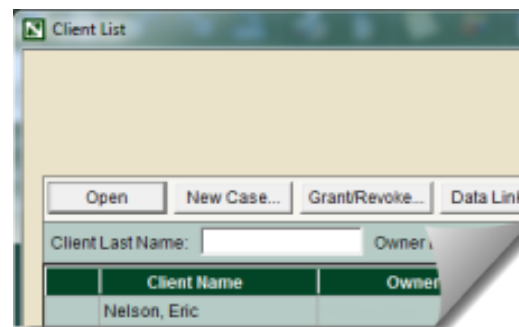
2. From the **Client List** screen, click **Connect** in the lower-left corner of the screen. You will be prompted to enter your username and password.



If you have entered your information correctly, the **Connection Status** icon will show your status as **Online**.



3. The client cases will begin to be uploaded to Profiles™ online automatically.
4. Once this process is complete, you can login to Profiles™ online to verify that all of your client data have been successfully transferred.



Workflow

Once you have uploaded your client data, we recommend using only Profiles™ online from that point on. However, if you choose to continue to use your desktop version of Profiles™ be sure to use the check-in and check-out process to take advantage of the data-storage and protection features of Profiles™ online.

Once a file is checked-in, it means it is available for use online and should not be modified in the desktop version. You can always tell when a client file is checked-in because it will appear “greyed-out” when you attempt to select the file.

If you would like to make changes to a client file via the desktop, be sure to select the client and then click **Check Out** before beginning your work. This will make the client file “read-only” in Profiles™ online. Once you have finished your work, check in your work to push your changes to Profiles™ online.

The Path to Premium

Profiles™ online features several advantages over desktop versions of Profiles™:

- Profiles™ online adds security to your clients' data. Through an active internet connection and secure server space you can be sure that your client data is both stored reliably and is well-protected.
- With Profiles™ online you will always receive the most up-to-date software. And because Profiles™ is accessed through the web you will never need to download and install anything to your PC.
- Profiles™ online also increases your mobility and ability to work remotely. With Profiles™ online you can access your client files from any computer with an active internet connection and a modern browser.
- Profiles™ online also saves you time and simplifies the process of working with client data. Unlike desktop versions of Profiles™, Profiles™ online always keeps your client files up-to-date without the need to check-in your changes.

Profiles Forecaster Features	Desktop	Premium (Web)
Offline Disconnected Mode	✓	
Internet Connection used to back up client information	✓	✓
Client Information stored securely by Advicent	✓	✓
Automatic software improvements and updates		✓
Access Profiles Forecaster from any computer		✓
Client files always up-to-date, no need to check-in		✓
Optional integration with 3 rd party CRM partners		✓
Streamlined client sharing		✓