



Client Import

- First we prepare the AdvisorCube (AdvisorCube excel file)

	A	B	C	D	E	F	G	H	I	J	K	L	
1	Generate Client Text File												
2													
3	FinanceCube input Client												
4	ClientID *	ClientName	Address1	Address2	Address3	Country *	AttentionPerson	Language *	SocialSecurityNumber	Email *	Telephone	Mobile Telephone	Fax
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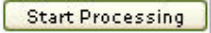
- We continue filling the AdvisorCube excel file.
 1. In clientID field you have to insert the target clientID without anything in front.(is added automatically from the system). Minimum number of characters is 5 alphanumeric characters (A-Z,a-z,0-9).You might experience problems if an attempt to insert other characters is made.
 2. **Client Status:** for client="C1" for advisor="A1"
 3. **Performance Type=1**
 4. **Advisor:** The Id of advisor that the client belongs to.
 5. **Open Date:** Date that imported **mm/dd/yyyy**
 6. **Close Date:** Usually we put +5 years. **mm/dd/yyyy**
 7. **Key Account Manager:** If you don't have then leave space.
 8. The rest of the fields are required

Now the excel file is ready. Press button. Will be produced txt file which is the one will import from Basic Import.



➤ AdvisorCube

Login to Financecube and from Services Tab ⇨ Standard import ⇨ Basic Import.

1. **Select Process**= Client
2. **Select File**=Browse and find the txt file named client.
3. Press **Start Processing** Button. 
4. The upload is in progress.
5. When the upload is finished you will receive msg "Your file has been uploaded successfully".

- Have in mind that when we insert clients, automatically password=clientID and pin=1111.
- You can change it manually after selecting client from personal tab ⇨ change password (left side)

