

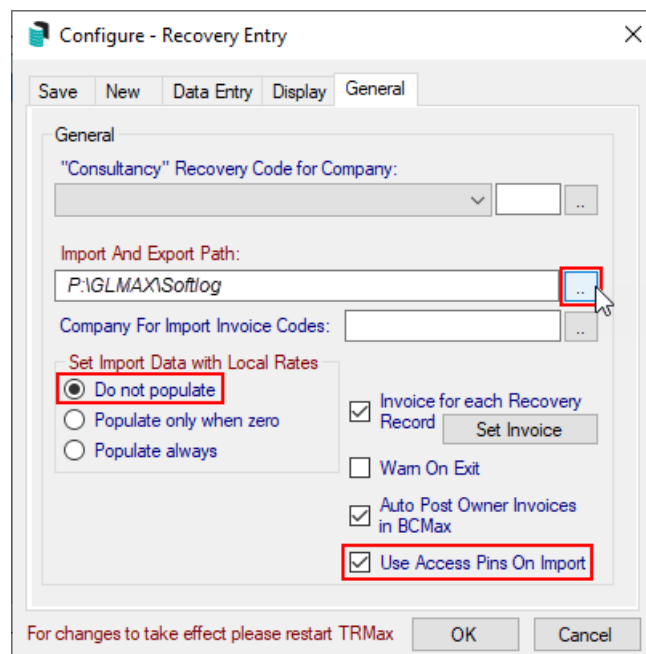
This article covers the setup, export, and import of data to and from Softlog recording software in *TRMax*.

We highly recommend contacting our *StrataMax Support Team* if you would like to import any records in bulk as a one-off.

Softlog Data Folder Setup

Please follow the below steps to set up the Softlog data folders, which is required before exporting and importing Softlog files.

1. Search or select *TRMax* and click *File > Configure*, then select the *General* tab.
2. Click the ellipsis [...] button next to the *Import and Export Path* field.



3. Browse to and select the required folder to import data from or export data to.
 - In the above example, the path is *P:\GLMAX\Softlog*.

- We recommend using the *GLMax\SoftLog* folder located inside the StrataMax installation folder on your server.
4. Set the rest of the settings/boxes as per the above screenshot, then click *OK*.

Softlog Operator PIN

The Softlog Operator Pins are set up in **Security Setup**. The Access Code or Extension field is where data must be entered if using the exported **TRMax** Operator.txt file to pick up the User details.

1. Search or select **Security Setup**.
2. Locate the Username of the staff member, right click and select **Edit User Profile & Manager Account**.
3. The Softlog Pin for each operator must be entered in the *Access Code* field and/or the Extension field and saved.

The screenshot shows a 'User Profile & Manager Account' dialog box with the following fields and values:

- Username:** tony
- Title:** Ms
- First Name:** Online
- Surname:** Help
- Key:** (empty)
- Email Address:** help@stratamax.com.au
- Extension:** 001
- Department:** Training Team
- Access Code:** 2022 (highlighted with a red box)

Below the main fields, there are two sections for 'Manager Accounts':

- Portal:** Administrator Privileges (selected) - The user has access to all areas of the Manager Portal Website, including Reports & Documents pricing and CMS pages.
- Meeting Hub:** Administrator Privileges (selected) - The user has access to Meeting Hub allowing them to create meetings and agendas and manage standard meeting templates.

A 'Save' button is located at the bottom right of the dialog box.

Export Recovery Data

Exporting recovery data is required to maintain up to date files relating to **TRMax** operators, invoice codes and buildings.

1. Search or select **TRMax**.
2. Select *File > Export Recovery Data*.

Import Softlog Data

The below noted information is a guide to how much information can be captured for importing for recoveries and not all fields are mandatory. The highlighted fields below are required within the text file. It should be noted that the time should be included in a 24 hour format.

To import Softlog data follow the below steps:

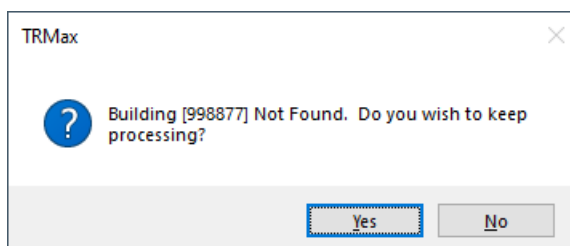
1. Create an Excel sheet and enter the required data, where each row is a recovery item and the columns are as follows:

Recovery Code	Unit Price	Number of Units	Date	Time	Building Number	Operator	Notes that will display in TRMax recovery
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Example file including additional column references for time (24 hr format), operator and notes.

```
*Return.txt - Notepad
File Edit Format View Help
A1,13.2,1,20/04/2022,5:07:00,7396,ke,RFT-70191
A1,13.2,1,20/04/2022,17:07:00,7396,ke,RFT-70192
A1,13.2,1,20/04/2022,15:02:00,7396,ke,RFT-70183
A1,13.2,1,20/04/2022,14:59:00,7396,ke,RFT-70174
A1,13.2,1,20/04/2022,14:56:00,7396,ke,RFT-70165
A1,13.2,1,20/04/2022,04:42:00,7396,ke,RFT-70156
```

2. Save the Excel file as a comma delimited .csv file, then change the file to a .txt, naming it 'Return.txt', and place it in the folder which has been configured in **TRMax** > File > Configure > General (tab) > Import and Export Path.
3. Open the 'Return.txt' file and remove any blank paragraphs from the bottom of the list, which can sometimes appear from converting the file from .csv to .txt. Then close the file.
4. Search or select **TRMax** and click File > Import Recovery Data.
5. Select the "Softlog" option and click OK.
 - o If the below message appears, click 'No' to cancel the import and check the 'Return.txt' file and make sure all building numbers are correct, and make sure there are no blank paragraphs at the bottom of the list. Then try to import again.



6. Once successful, a confirmation will appear with the dollar value that has imported.
7. Close **TRMax** and open it again to display the imported records.

Softlog Printers

The following printers must be excluded from Softlog:

- HP Max Software
- HP Maxsoft Color PS