Instructions for Exporting/Importing Client Files
from ProDoc to TXdocs (TXdocs cloud version)

IN PRODOC

1. On ProDoc's top menu, click **Tools** and then select **Database Transfer** and then select **Transfer Contacts Data Out**
2. In the window that pops up, enter or select a file folder on your computer for ProDoc to put the files (note, it's easy if you use file explorer to create a new folder and then use that folder)
3. In the window that pops up, click the **Select All** button then click **OK**
4. A window will pop up showing you each client/case as it's exported.
5. When it's finished, a small window will pop up saying the Transfer was completed. Click **OK**.

   ProDoc will create these 6 export data files. Each file ends with ".tps"

ANSWERS.TPS	FILES.TPS
CASES.TPS	PHONES.TPS
CONTACTS.TPS	PRIVCON.TPS

You are now ready to import the data into your TXdocs account so login to TXdocs.
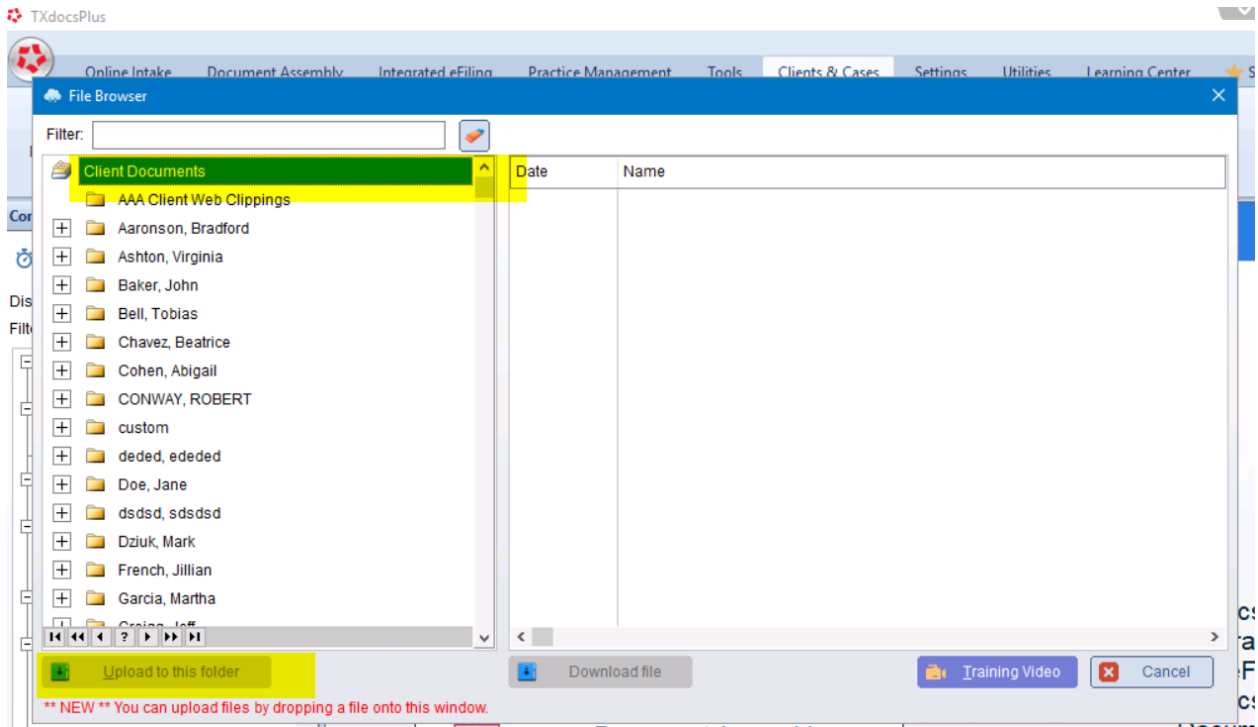
IN TXDOCS

Since TXdocs is running in the cloud, the first thing you will do is upload your ProDoc data files to TXdocs' internet server.
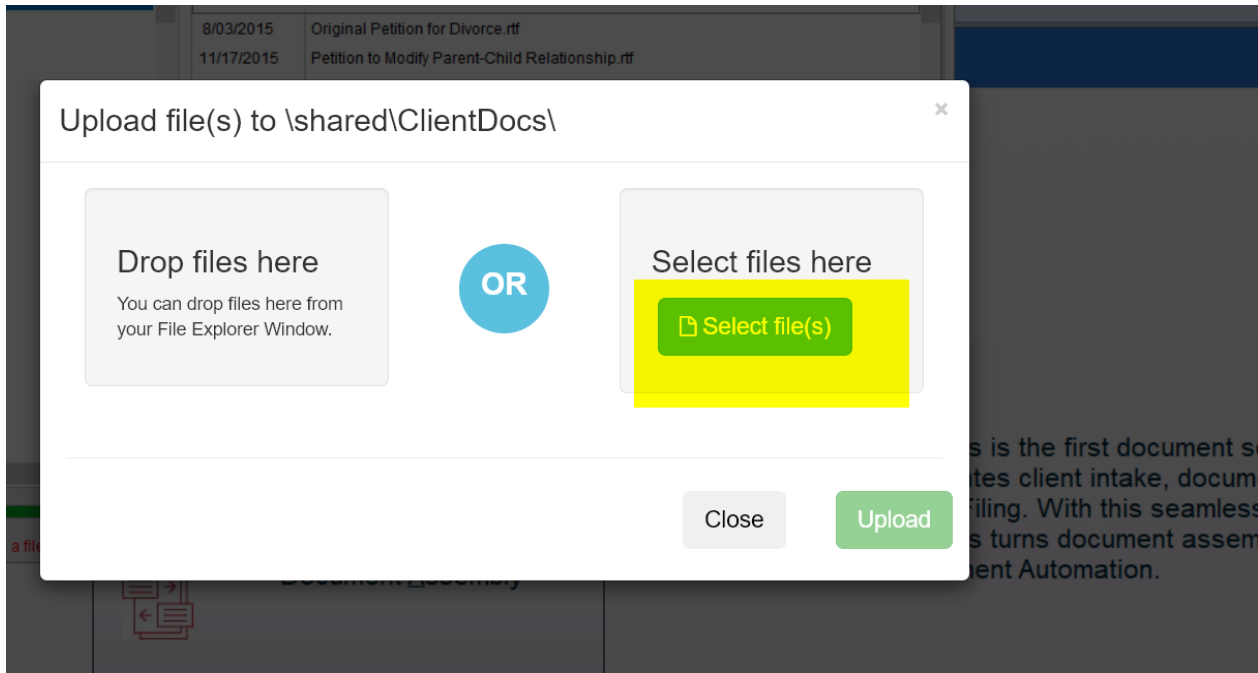
1. On TXdocs' top menu, Select **Clients & Cases** and then click the **Upload/Download** button.
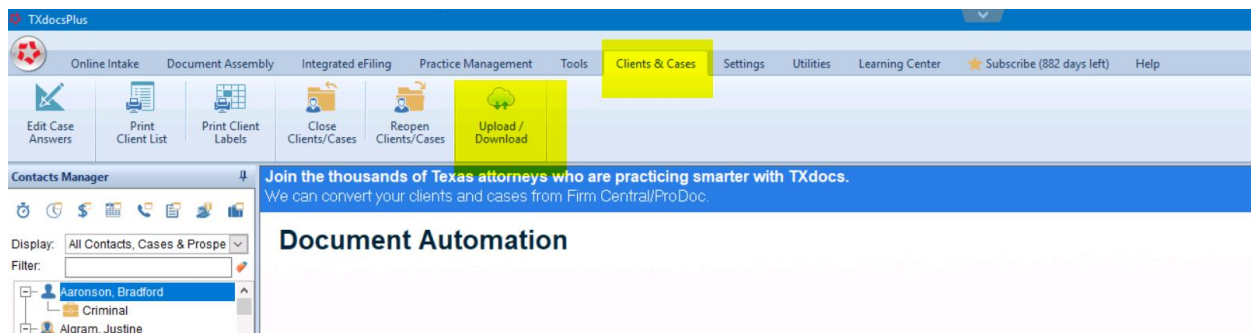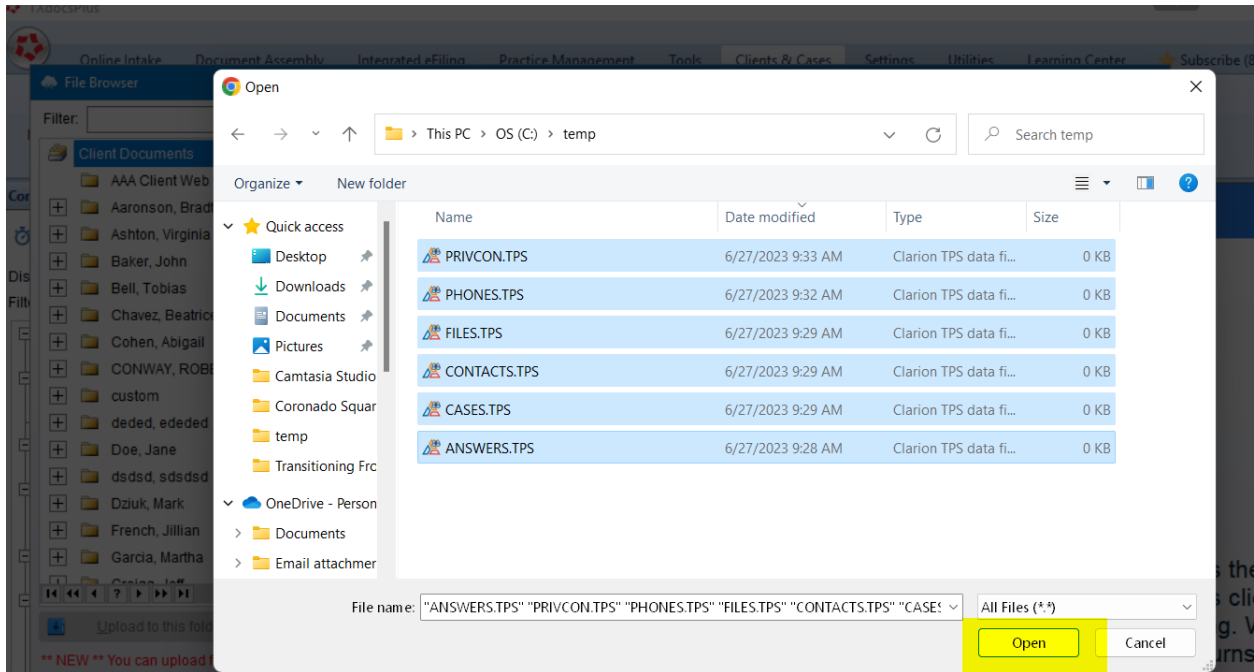

2. The TXdocs File Browser window will open. In the list on the left side, select the **Client Documents** folder then click the **Upload to this folder** button.
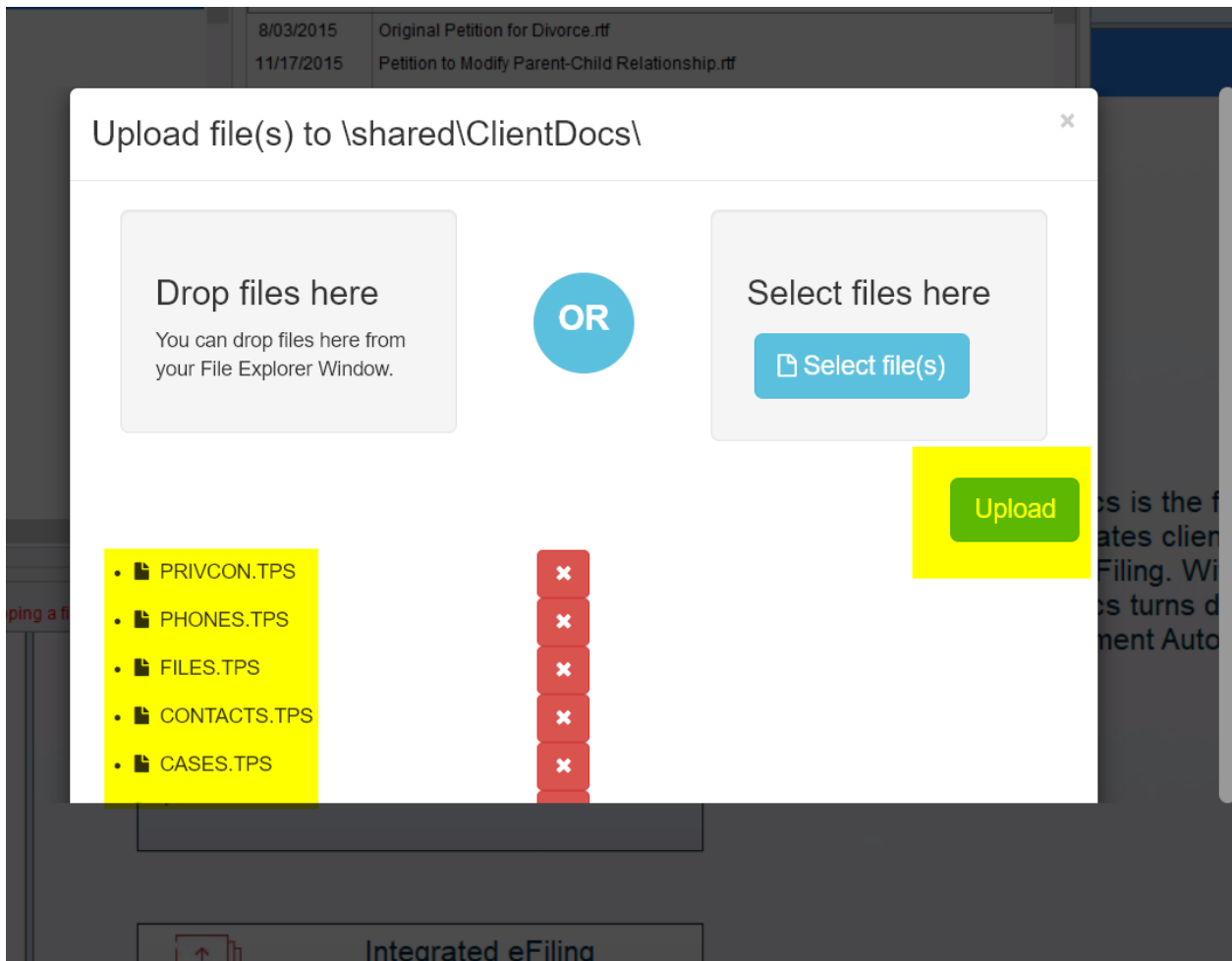
3. A window will open and that is where you tell TXdocs which files to import. Click the **Select file(s)** button.

4. A window will pop up where you can select ProDoc's exported files. After you select all six files click ***Open***.


5. TXdocs will then list the files when they are ready to upload. Click the ***Upload*** button to finish uploading.

6. After the files have been uploaded click **Close**. Now you will be back at TXdocs' File Browser window. Click the **Cancel** button in the bottom right corner.

Now that the exported data files have been uploaded to TXdocs' server, it's time to import the data into TXdocs.

7. On TXdocs' top menu, select **Utilities** and then click the **Import Data** button and Select **Import ProDoc data**.
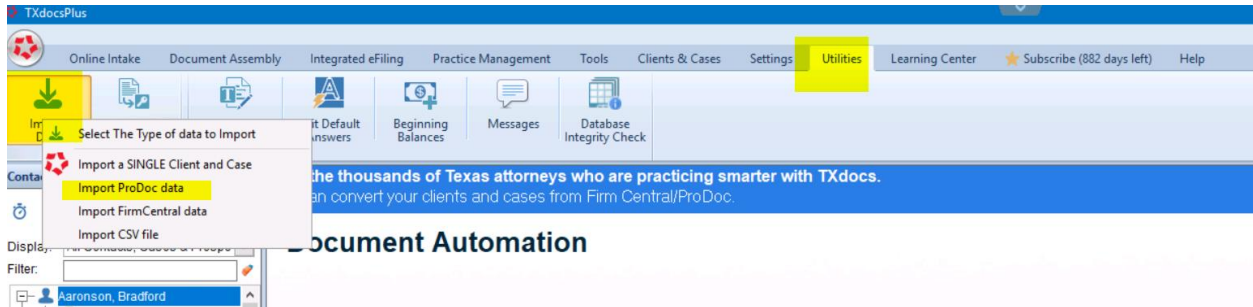
8. A window titled **Import ProDoc Data** will open. There is a blank for you to enter the folder where you uploaded the ProDoc files. To the right of that field, click the little box icon with 3 dots on it.
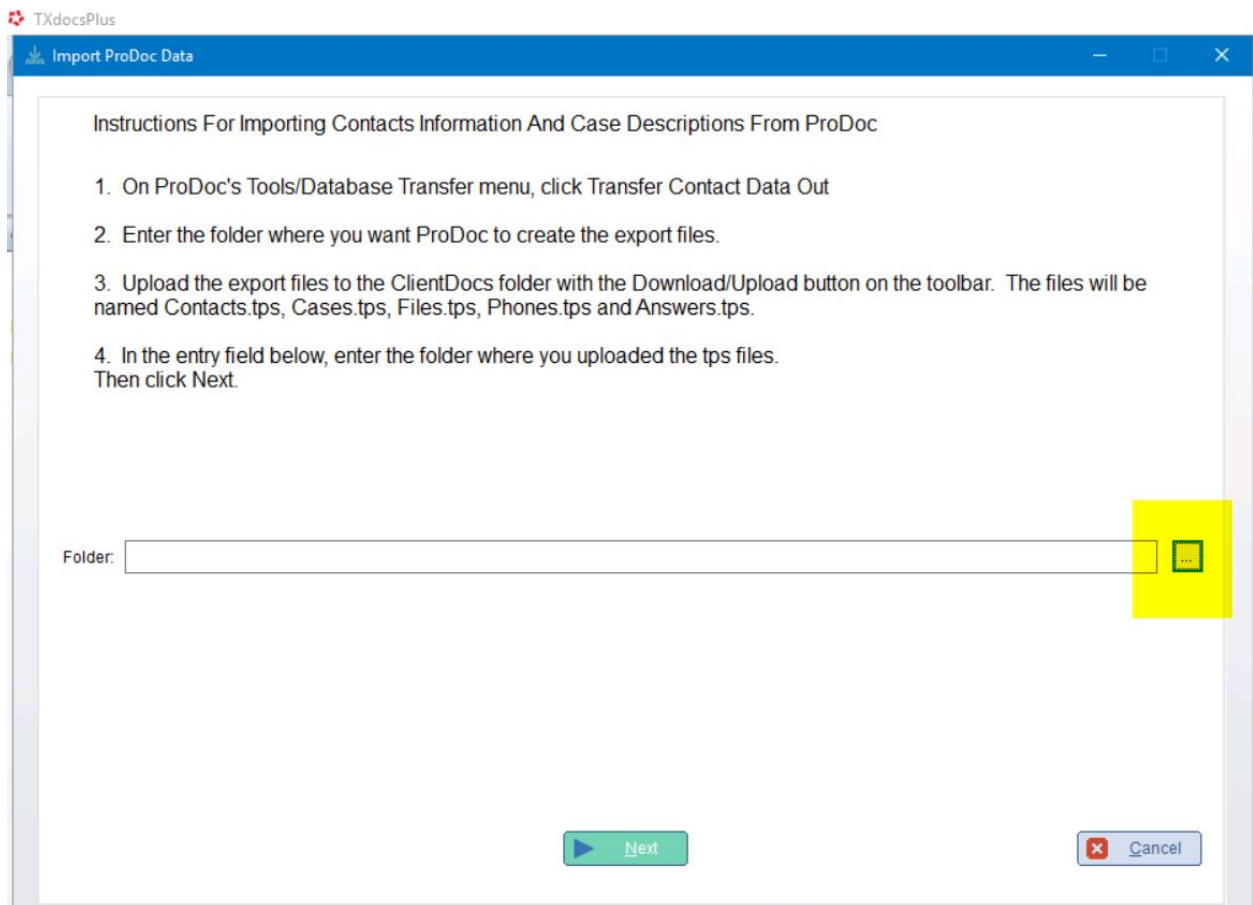
9. TXdocs' File Browser window will open again. Select the *Client Documents* folder. Then click the *Select folder* button.
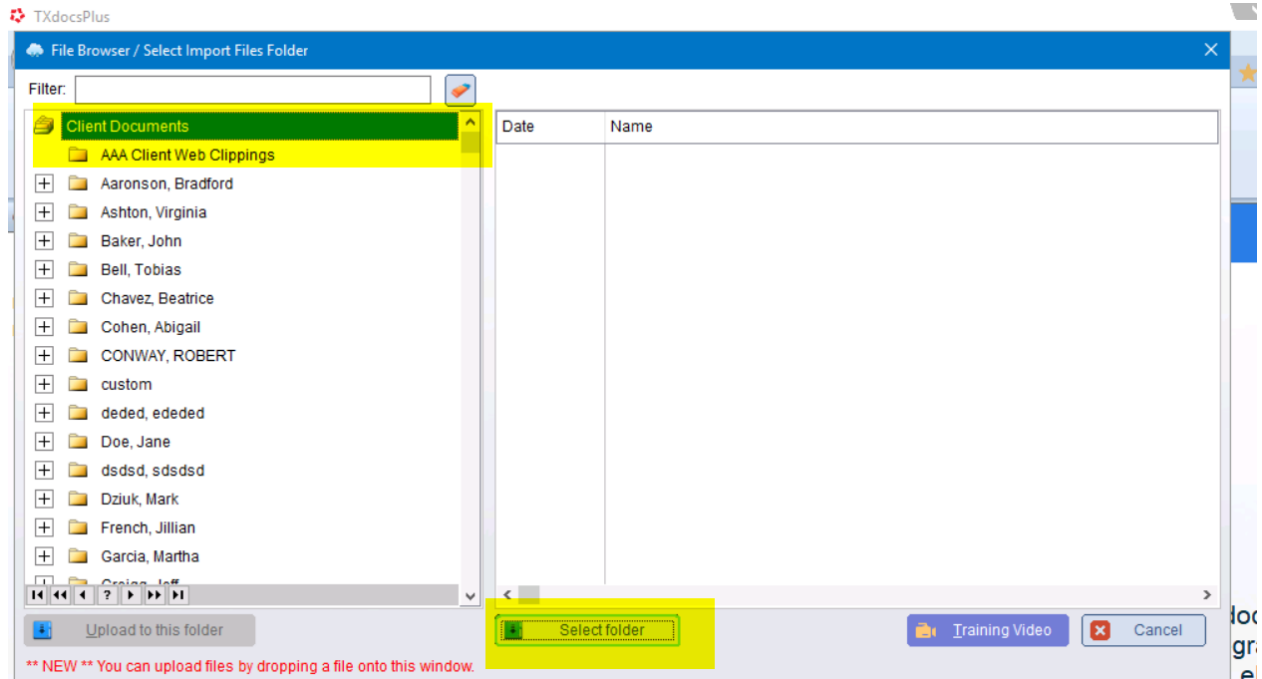
10. When TXdocs returns to the previous window, click the *Next* button.

11. When the window opens showing all your clients, click the *Next* button.

12. TXdocs will do some processing and then a window will tell you the import is ready. Click the *Import data* button.

13. When the import is complete, click *OK* .

14. That's it – you're done.