Importing Case Data

One of the biggest time-saving features of *Make It! Personal* is its ability to import case profile data from today's most popular Management Software suites. This eliminates the need to enter the same data multiple times.

The following software will export case data in a format that can be imported into Make It Personal:

[Continental - The Director's Assistant (TDA)](#)

[Gather](#)

[Halcyon Funeral Home Management Software](#)

[SRS Procession Software](#)

[FuneralTech MiMs Software](#)

[FrontRunner](#)

[Passare](#)

[Osiris Funeral Director's Resource](#)

It's important to note that you will need to contact the vendors listed above to have the software configured to export in the correct format PRIOR to attempting to export/import case data.

How to import

All of these programs will output a file that will you will save to the location of your choosing, most often this is the **Downloads** folder, or perhaps on your desktop. This file's name will always end in **.xml**
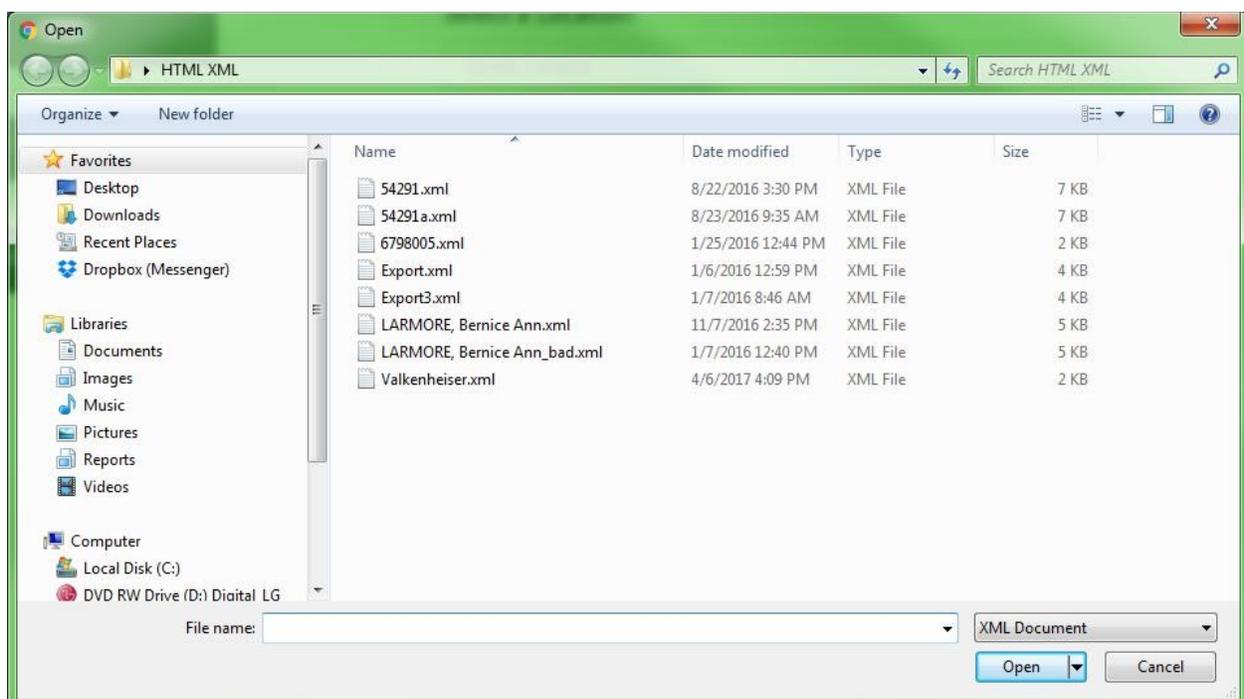
From the home screen/step #1 – Select Case, click **Import From Management Software**.
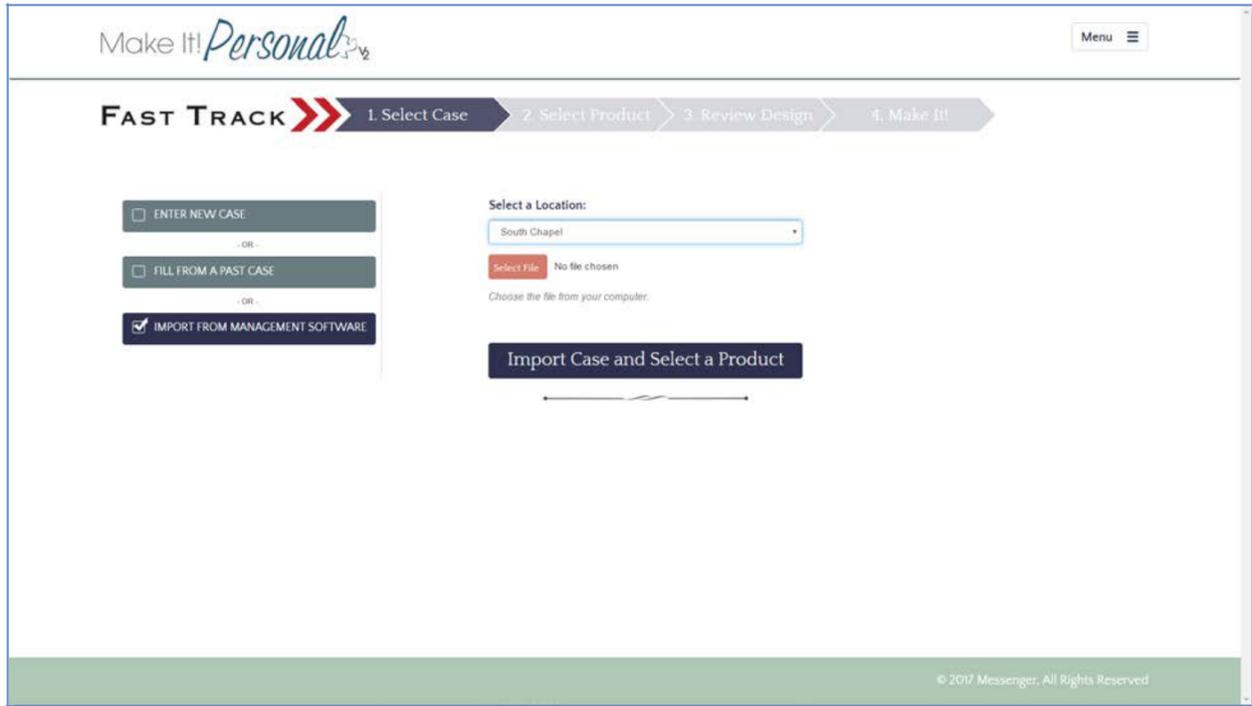
Next, select a location to associate the case with from the drop-down. Click **Select File**. Navigate to the .xml file and open it. The filename should now appear next to the **Select File** button.
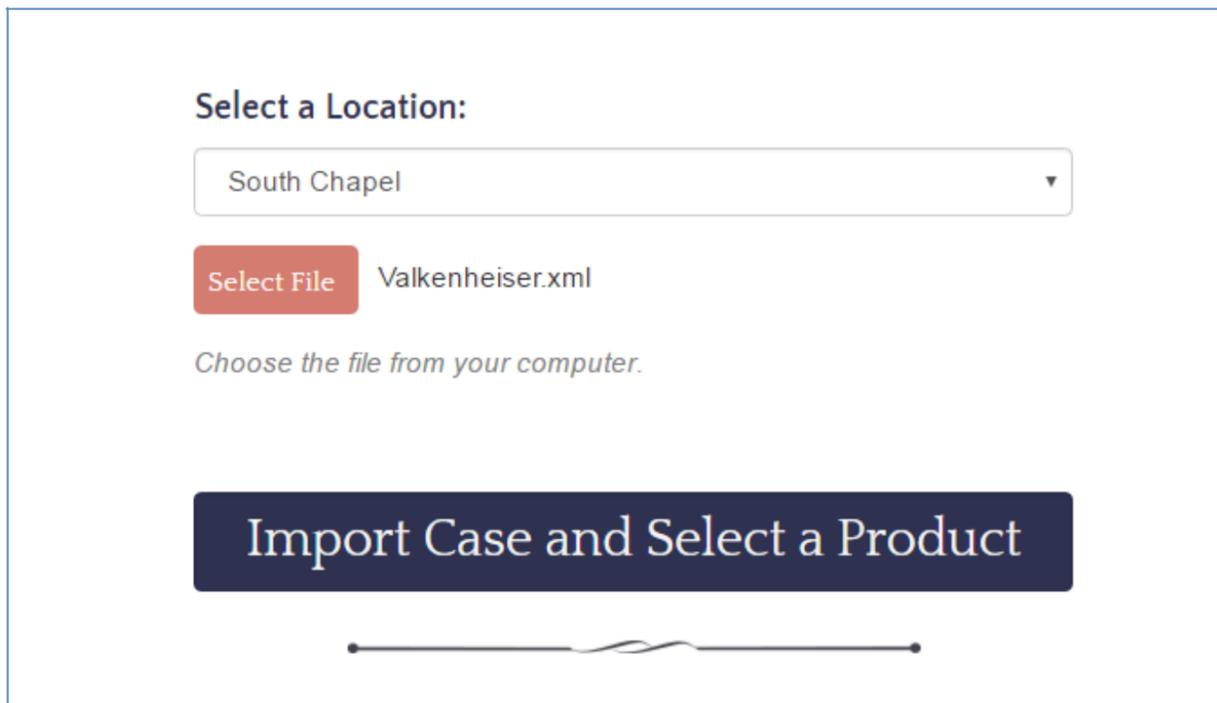
Finally, click **Import Case and Select Product**. The case data will now upload and create a new *Case Profile*. You will now be at step #2 – Select a Product.
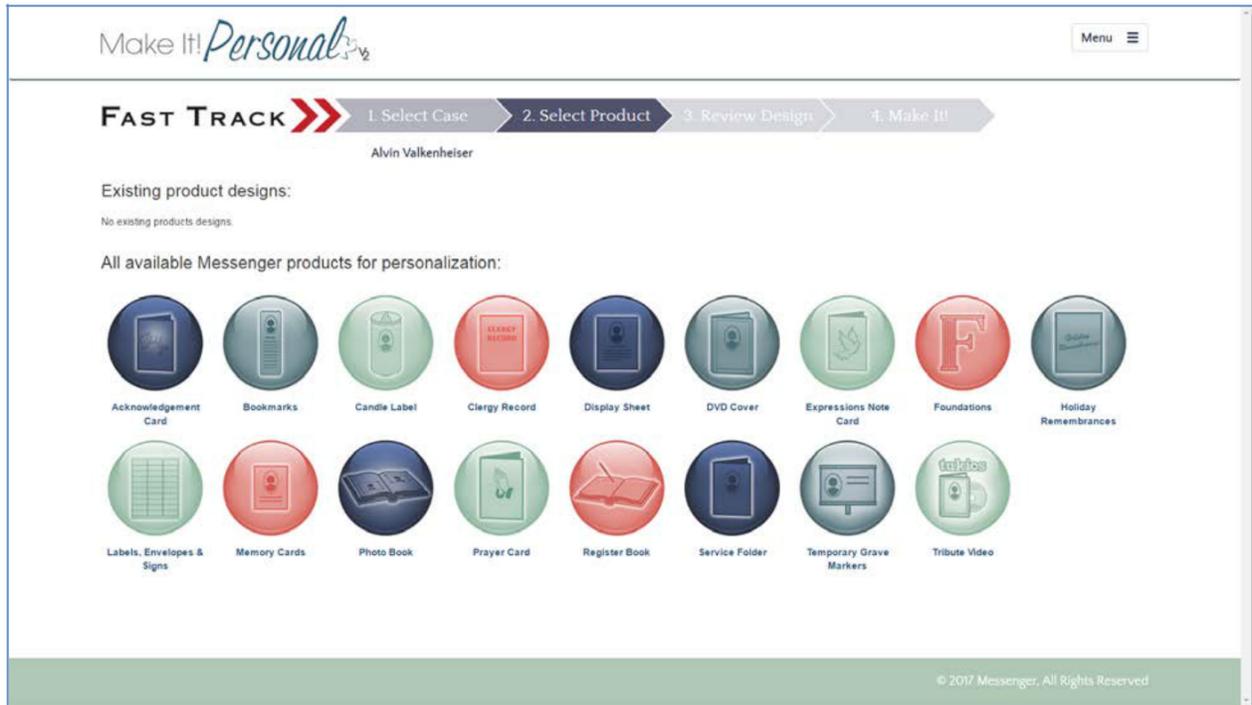
From here you can continue creating a design for this case, alternately, you can edit/review the information by clicking **Menu** > **Manage Case Info**. For more information on designing in the Fast Track, click here.

For more information on case management, click here.