

Panorama Bulletin

March 23, 2015

Information Bulletin 0034

Quick Reference: *Error when attempting to import a client into Panorama from SCI*

Issue:

When saving a client imported from SCI a red dot error occurs. The issue is when one or more of the factory tables have multiple entries and none are set as “Preferred” (see screenshot). When a user tries to save the record in this state the red dot error is observed.



Alternate Names

Name Type: First: Last:

Row Actions:

	Name Type	First	Last	Preferred
<input type="radio"/>	Alias	Fred	Flinstone	
<input type="radio"/>	Alias	Freddy	Flinstone	

Solution:

Set one of the entries to ‘preferred’.

Steps:

- 1) Highlight the radio button beside the entry you want to make preferred
- 2) Click the “**Set Preferred**” button

Alternate Names

Name Type: First: Last:

Row Actions:

	Name Type	First	Last	Preferred
<input checked="" type="radio"/>	Alias	Fred	Flinstone	<input checked="" type="checkbox"/>
<input type="radio"/>	Alias	Freddy	Flinstone	<input type="checkbox"/>

- 3) Scroll through the record and ensure all tables with multiple entries (please see picture above) have one set to 'preferred'.
- 4) Save the client record.

List of tables with a preferred column

- Alternate Names
- Telephone Numbers
- Addresses
- Email Addresses (not likely populated from SCI)

Note: Although this solution works for the majority of records, there are a few reports of the Panorama user being unable to import the Client after setting the 'preferred'. If this occurs please create the client manually after ensuring that this client cannot be found in Panorama and therefore not creating a duplicate client.

Contact

If this is not working for you or you are requiring further assistance please contact the Service Desk or your regional Superuser.