

Copy Client Data in Conversion Management

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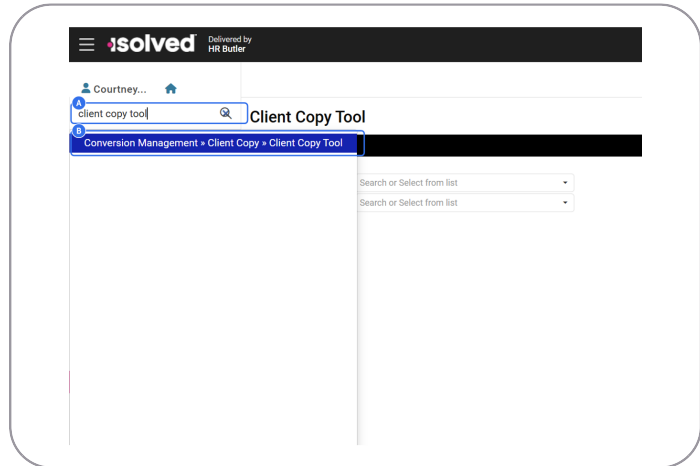
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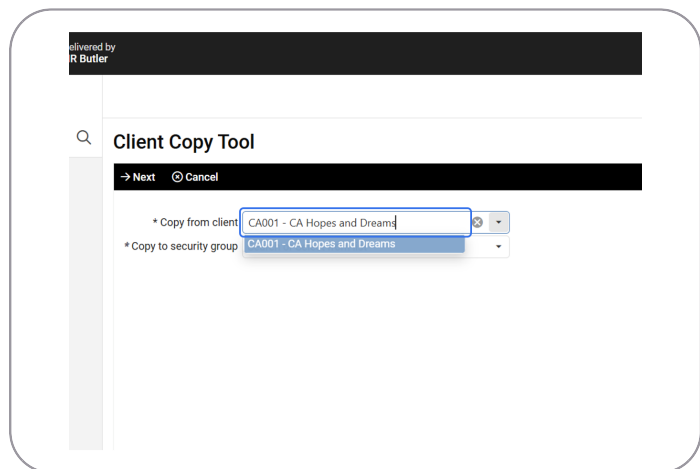
1

- A. Type client copy tool
- B. Click on Conversion Management » Client Copy » Client Copy Tool



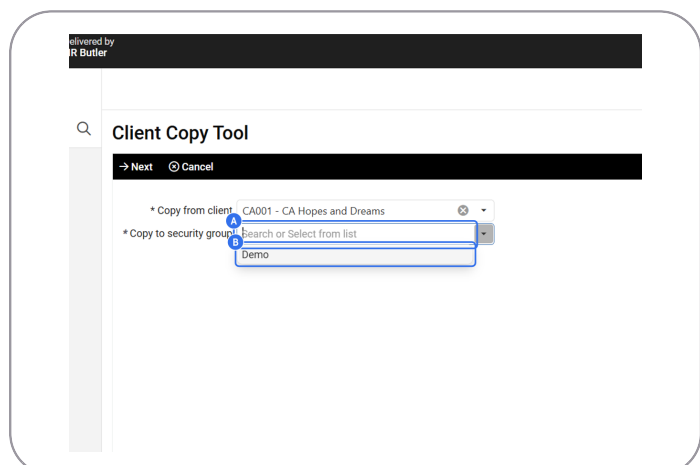
2

- Type your search query



3

- A. Click on dropdown trigger
- B. Select Default Security Group



4

Click on Next

The screenshot shows the 'Client Copy Tool' interface. On the left is a sidebar menu with items like 'Employee Management', 'Employee Admin Tools', 'Employee Self-Service', 'Client Management', 'Support Hub', and 'Roll Processing'. The main area has a header 'isolved Delivered by HR Butler' and a title 'Client Copy Tool'. Below the title are two buttons: '→ Next' (highlighted with a blue box) and '⊗ Cancel'. Below these buttons are two input fields: '* Copy from client' with the value 'CA001 - CA Hopes' and '* Copy to security group' with the value 'Demo'.

5

A. Type Copy to Client ID
B. Type Copy to Client Name

The screenshot shows the 'Client Copy Tool' interface. The sidebar menu is visible on the left. The main area has a header 'isolved Delivered by HR Butler' and a title 'Client Copy Tool'. Below the title are three buttons: '← Previous', '→ Next' (highlighted with a blue box), and '⊗ Cancel'. Below these buttons are two input fields: 'Copy to Client ID' with the value 'CA04' and 'Copy to Client Name' with the value 'Courtney Testing'. Below these fields is an 'Add New' button.

6

Click on Next

The screenshot shows the 'Client Copy Tool' interface. On the left is a sidebar menu with items like 'Employee Management', 'Employee Admin Tools', 'Employee Self-Service', 'Client Management', 'Support Hub', and 'Roll Processing'. The main area has a header 'isolved Delivered by HR Butler' and a title 'Client Copy Tool'. Below the title are three buttons: '← Previous', '→ Next' (highlighted with a blue box), and '⊗ Cancel'. Below these buttons are two input fields: '* Copy to Client ID' with the value 'CA04' and '* Copy to Client Name' with the value 'Courtney Testing 2'. Below these fields is an 'Add New' button.

- 7
- A. Click on dropdown trigger
B. Select Items

Cancel

CA001 - CA Hopes and Dreams
Demo

Copy to Client Name
Courtney Testing 2

Copy from Legals

Select

☐ Select All

☐ CA001 - CA Hopes and Dreams

- 8
- Click on Next

ed

Delivered by
HR Butler

Client Copy Tool

Previous

Next

Cancel

Copy from Client: CA001 - CA Hopes and Dreams
To Security Group: Demo

Copy to Client ID
CA04

Copy to Client Name
Courtney Testing 2

9

Type Copy to Legal ID

and Dreams

Copy from Legal
A Hopes and Dreams

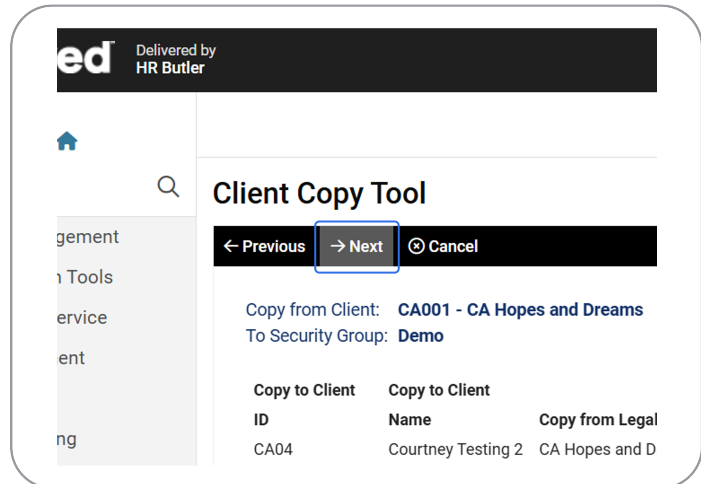
* Copy to Legal ID
CA04

* Copy to Legal Name
CA Hopes and Dreams

Created with *Tango*

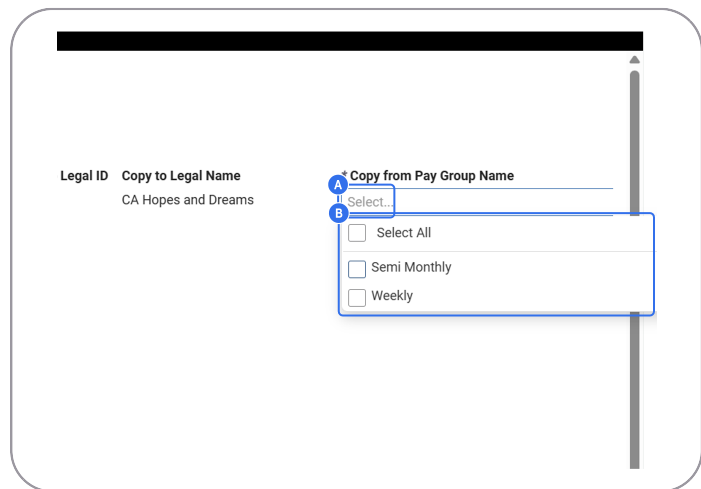
4 of 6

10 Click on Next



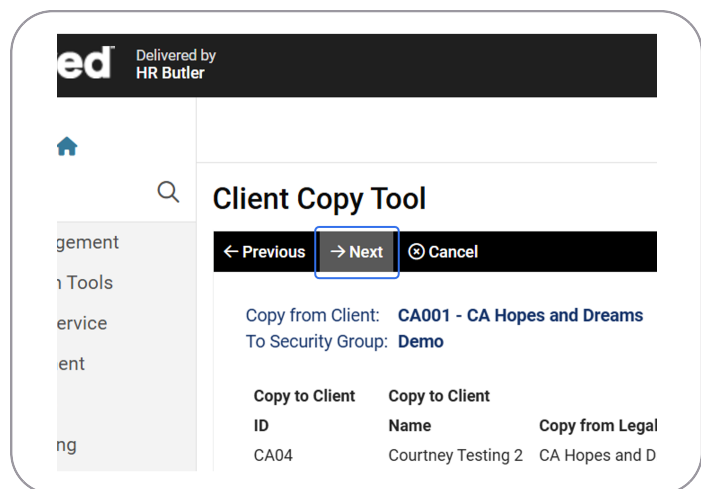
The screenshot shows the 'Client Copy Tool' interface. At the top, there's a header with 'ed' and 'Delivered by HR Butler'. Below the header, there's a navigation bar with a home icon and a search icon. The main content area has a title 'Client Copy Tool' and a navigation bar with buttons: '< Previous', '→ Next' (highlighted with a blue box), and '⊗ Cancel'. Below the navigation bar, there's a section for 'Copy from Client: CA001 - CA Hopes and Dreams' and 'To Security Group: Demo'. At the bottom, there's a table with columns: 'Copy to Client ID', 'Copy to Client Name', and 'Copy from Legal'. The table contains one row: 'CA04', 'Courtney Testing 2', and 'CA Hopes and D'.

11 A. Click on dropdown trigger
B. Select Items



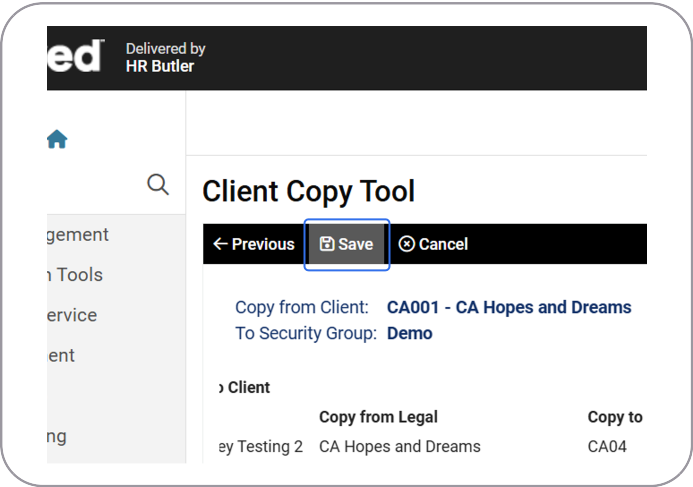
The screenshot shows the 'Client Copy Tool' interface. On the left, there's a table with columns: 'Legal ID', 'Copy to Legal Name', and 'Copy from Pay Group Name'. The table contains one row: 'CA Hopes and Dreams'. On the right, there's a dropdown menu for 'Copy from Pay Group Name'. The dropdown is open, showing a list of items: 'Select...', 'Select All', 'Semi Monthly', and 'Weekly'. The 'Select...' item is highlighted with a blue box. The dropdown is also labeled with 'A' and 'B'.

12 Click on Next



The screenshot shows the 'Client Copy Tool' interface. At the top, there's a header with 'ed' and 'Delivered by HR Butler'. Below the header, there's a navigation bar with a home icon and a search icon. The main content area has a title 'Client Copy Tool' and a navigation bar with buttons: '< Previous', '→ Next' (highlighted with a blue box), and '⊗ Cancel'. Below the navigation bar, there's a section for 'Copy from Client: CA001 - CA Hopes and Dreams' and 'To Security Group: Demo'. At the bottom, there's a table with columns: 'Copy to Client ID', 'Copy to Client Name', and 'Copy from Legal'. The table contains one row: 'CA04', 'Courtney Testing 2', and 'CA Hopes and D'.

13 Click on Save



14 Click on Save

