

How to Copy Grid Layout Files

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Overview

When a user adds, removes or rearranges columns in a grid, the file is saved into that specific user's folder. To copy the layout from one computer to another or one user to another, follow these instructions.

Note: This method only applies for versions before 4.4. For more information on how to copy layouts in versions beyond that, please refer to our <u>Layout Maintenance</u> documentation or the video <u>here</u>.

Instructions

COPYING GRID LAYOUTS FROM ONE COMPUTER TO ANOTHER

- On the computer you will be copying from, entering the following into the start search/run menu as shown below to open the grid layouts folder directly: %APPDATA%\SalesPad, LLC\SalesPad\SalesPad Grid Layouts
- 2. Select all the files, right--click, then send to a Compressed Zip File. This will create a new zip file containing all the selected grid files.
- 3. Copy this file to a flash or network drive that you can access from the other computers you will be copying to
- 4. On the computer you are copying to, open the following folder, as in step 1: %APPDATA%\SalesPad, LLC\SalesPad\SalesPad Grid Layouts
- 5. Copy the files from the zip file into this folder

COPYING GRID LAYOUTS FROM ONE USER TO ANOTHER

Note: The following instructions are based on the Windows Vista OS. The procedure may vary depending on the OS being used.

- 1. Open Windows Explorer by right--clicking the Start button and selecting **Explore**
- 2. Find your local disk drive, in this case **C:**, and open the **Users** folder
- 3. Navigate to the user profile you are currently logged into, in this case, the Brandon profile **x** ■
- 4. From there, navagate to **AppData** > **Roaming** > **SalesPad, LLC** > **SalesPad** ✓
- 5. In the **SalesPad** folder, you will find a folder labeled **SalesPad Grid Layouts.** Copy that folder onto a flash drive or network drive
- 6. Log on to the target user and paste that folder onto the same directory where you found the **SalesPad Grid Layouts** folder. You will either want to delete any existing **SalesPad Grid Layouts** folder within that directory or merge and replace all the

files within that folder