**LPL\_LMS Reference Insert Project-PDD**

# **STEPS:**

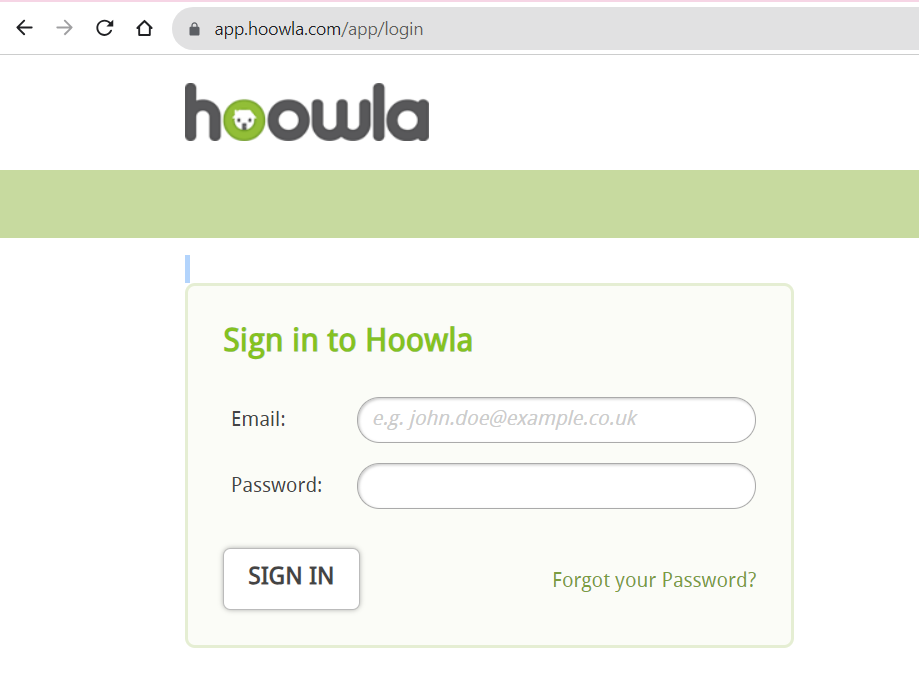
1. Read input Excel file



2.Get ORD column values, Client name column, postcode column in the Excel



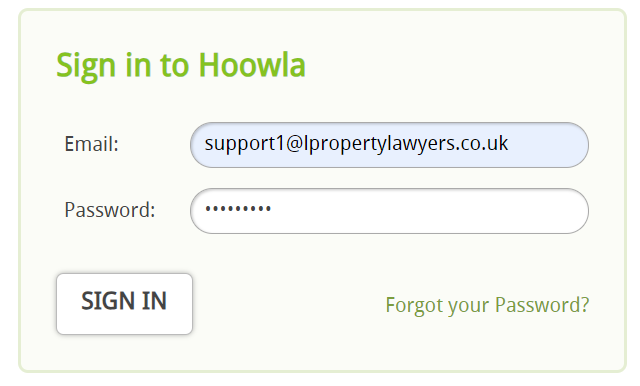
1. Open Hoowla portal ,Browser type: Chrome, UrL: <https://app.hoowla.com/app/login>



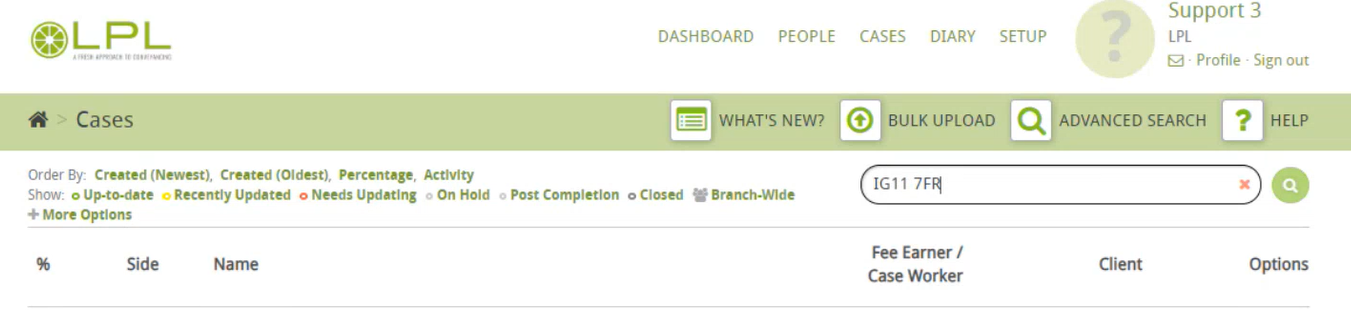
1. Type username: [support1@lpropertylawyers.co.uk](mailto:support1@lpropertylawyers.co.uk)

Type Password: \*\*\*\*\*\*\*\*\*\*\*

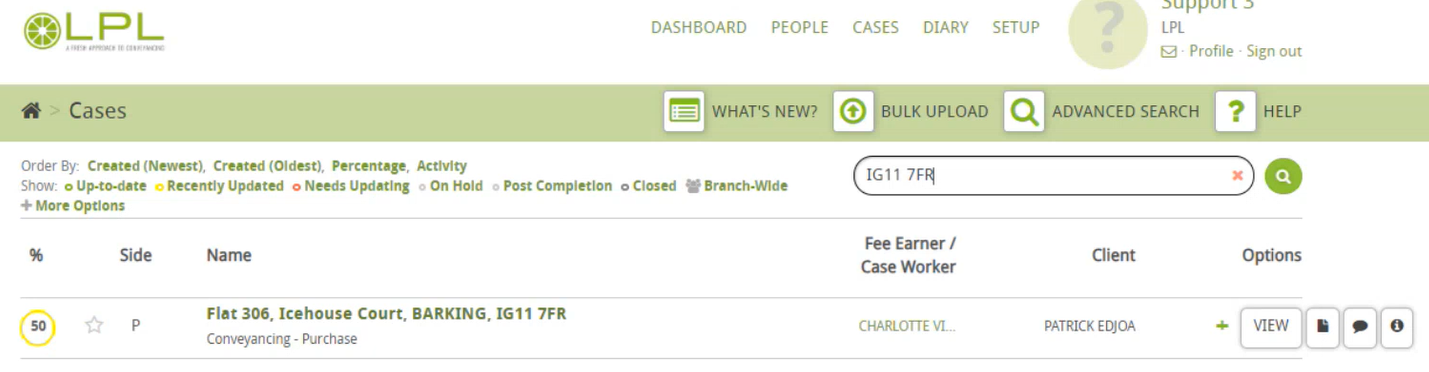
Click SIGN IN



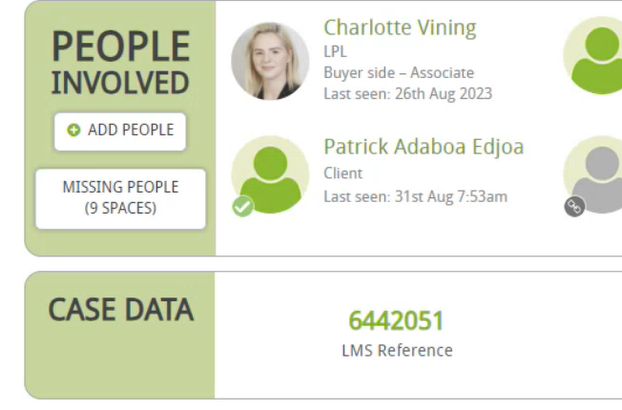
1. Click **CASES** and Type Input excel postcode: IG11 7FR

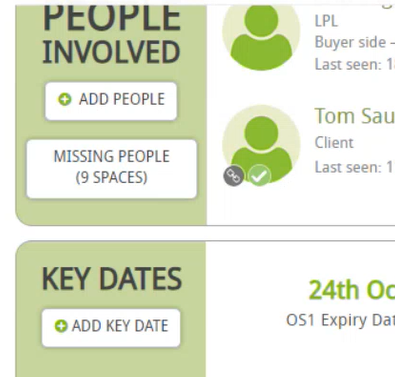


1. **Validate Postcode and Client using** **input excel postcode and client name**, if both are validated then click validated case. If case not validate click **On Hold** and again validate case, if not validate move to next case.

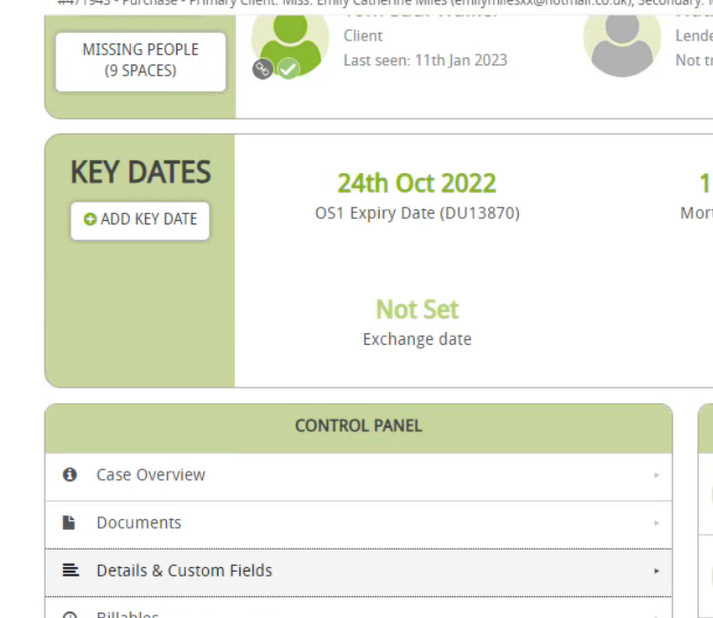


1. Check If the **CASE DATE** is found or not, if not found

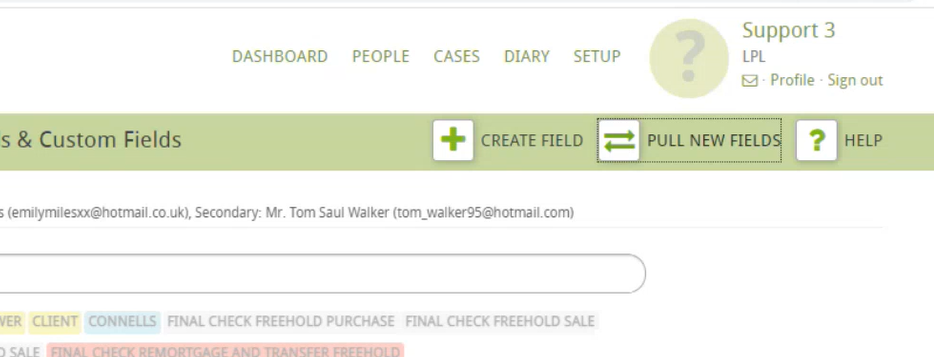
**CASE DATA** is found

**CASE DATA** is **not** found

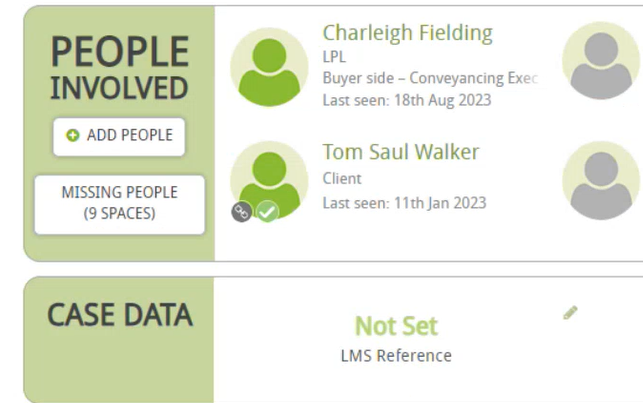
1. IF the **CASE DATA** is not found in the Below the People Involved tab, click **Details & Custom Fields**



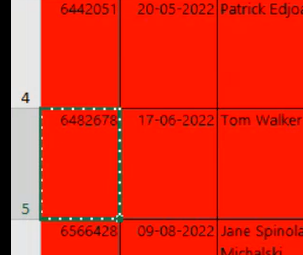
1. Click **PULL NEW FIELDS,** after click that wait for 5 seconds, and go back to the main page

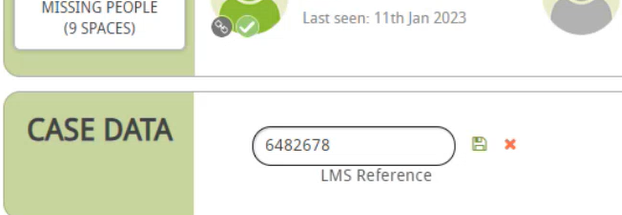


1. Hover the **Not Set** **LMS Reference,** click **Edit symbol**



1. **Get LMS reference number from input excel** and type Copied **LMS reference number into the Hoowla Reference, Click Save button**





1. Finally it shows like this

