MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

SHORTCUTS LIVE

CUSTOMERS

IMPORTING CLIENT DATA

HOME & MOBILE

BEAUTY

SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

Last updated 20 July 2016

By Erin Lewis

Product: Shortcuts Live

Software version no: 7.5

Document version no: 1.0

Country: Australia

CONTENTS

ABOUT THIS DOCUMENT

In Shortcuts Live, you can import a list of your existing customers by uploading a client data sheet. Rather than manually entering all your customer details, you can use the client import feature to help you save time when setting up your customer list.
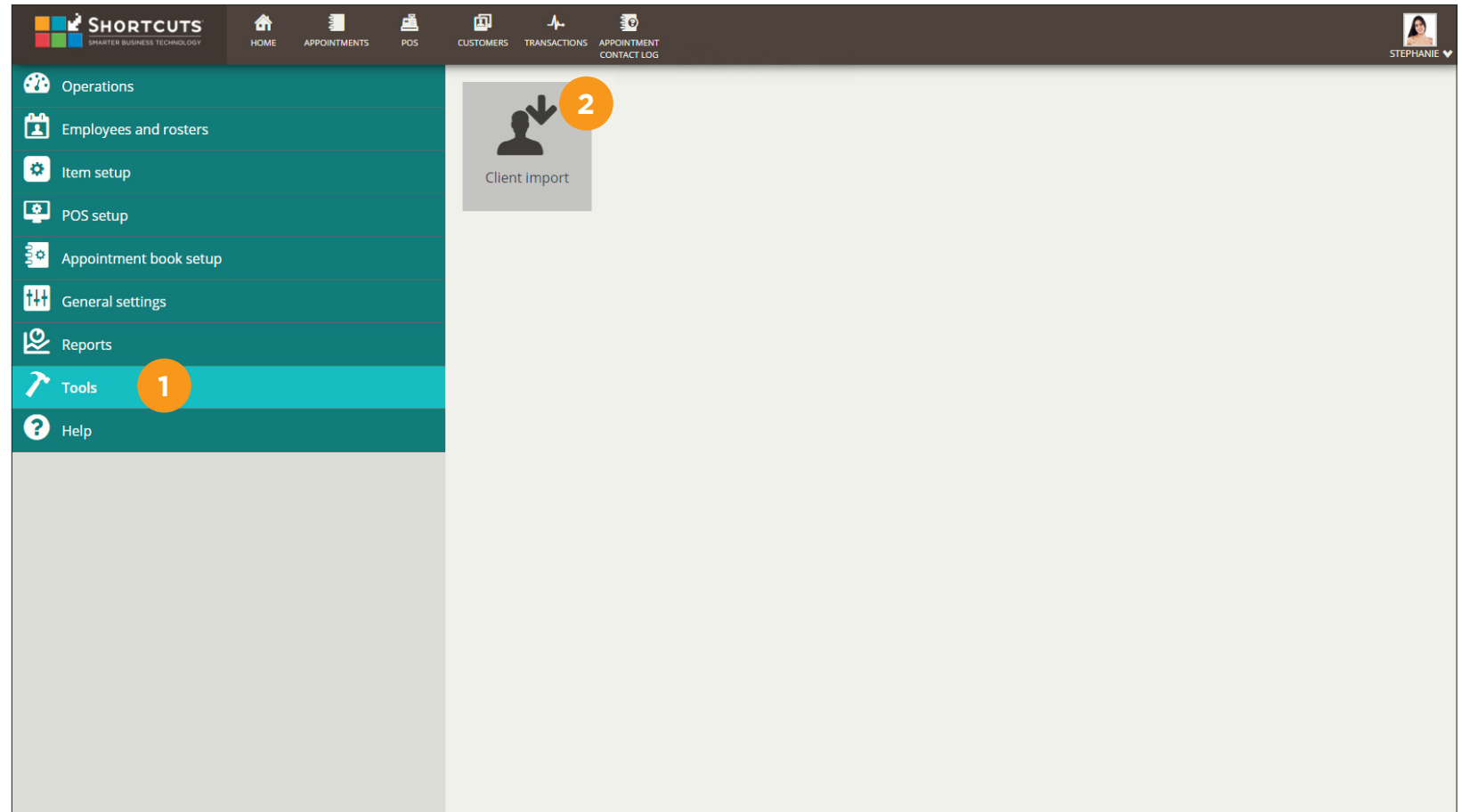
IMPORTING CLIENT DATA

1 Click on the **tools** menu.

2 Select **client import**.

3 Click **download template**.

4 Open the template file on your computer. It will usually be located in your downloads folder.

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STEPHANIE

client import

Import new clients

Step 1

Download spreadsheet template for new customers.   Download template   **3**

Step 2

Add new customers to the spreadsheet.

Step 3

Upload the spreadsheet.   Choose file

BACK

5 Enter the client details you wish to import.

! Ensure that all columns are in the same order as the original template otherwise an error will occur when you attempt to import it.

6 Once you have finished adding the relevant client details, save the file.

7 Exit the file.

	first name (required)	last name (required)	mobile number	home phone	email	street 1	street 2	suburb	state	postal code	alert message	birth day	birth month	birth year	gender (m/f)	preferred name	is active (y/n)	no ap
2	Erin	Smith	0411 111 111		erin@email.com	16 Lavender Lane		Waterford	CA	12345					f		y	
3	Stephanie	Jones	0422 222 222		stephanie@email.com	25 Rose Terrace		Stafford	MI	54321					f		y	
4	Peter	McDonald	0433 333 333		peter@email.com	3 Sunny St		Ashgrove	GA	112233					m		y	

8 Return to Shortcuts Live and click **choose file** to upload the client data sheet.

9 Select the client data file.

10 Click **open**.

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STEPHANIE

client import

Import new clients

Step 1

Download spreadsheet template for new customers.   Download template

Step 2

Add new customers to the spreadsheet.

Step 3

Upload the spreadsheet.   Choose file   **8**

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Open dialog:

This PC > Desktop

Organize ▾   New folder

This PC
- Desktop
- Documents
- Downloads
- Music
- Pictures
- Videos
- Archive Drive (A:)
- Windows (C:)
- Education Drive
- Common Drive
- Client Services D
- Prof Services Dri
- Marketing Drive

ISSetupPrerequisites

Peppermint Park Client List   **9**

File name: installs_com.shortcutssoftware.mysalon.vsbarbershop_201604_cour   Microsoft Excel Comma Separa

Open   **10**   Cancel

! If any errors have occurred within the data file, these errors will be displayed. You can then choose to either:

• Continue with the upload and correct the errors manually, or

• Return to the file, correct the errors and attempt another import.

A A preview of the imported data will be displayed.

B You can click on the arrow to view more of the imported data.

11 Click **continue** to import the data.

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STEPHANIE ♥

client import

Preview

Please review the following example import for correctness.

B

First name (required)	Last name (required)	Mobile number	Home phone	Email	Street 1	Street 2	Suburb	State	Postal code	**>**
Erin	Smith	0411 111 111		erin@email.com	16 Lavender Lane		Waterford	CA	12345	
Stephanie	Jones	0422 222 222 **A**		stephanie@email.com	25 Rose Terrace		Stafford	MI	54321	
Peter	McDonald	0433 333 333		peter@email.com	3 Sunny St		Ashgrove	GA	112233	

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CANCEL   CONTINUE

C A message will be displayed indicating if any errors were detected.

12 Click **import clients** to continue.

client import

Import file has been read with no errors. Press "IMPORT CLIENTS" to continue or cancel to start over. **C**

HOME APPOINTMENTS POS CUSTOMERS TRANSACTIONS APPOINTMENT CONTACT LOG

STEPHANIE

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javascript:void(0)

CANCEL

IMPORT CLIENTS

**D** You will be notified if the import is successful.

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STEPHANIE

client import

Import completed with no errors. **D**

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