

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

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IMPORTING CLIENT DATA 1

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.

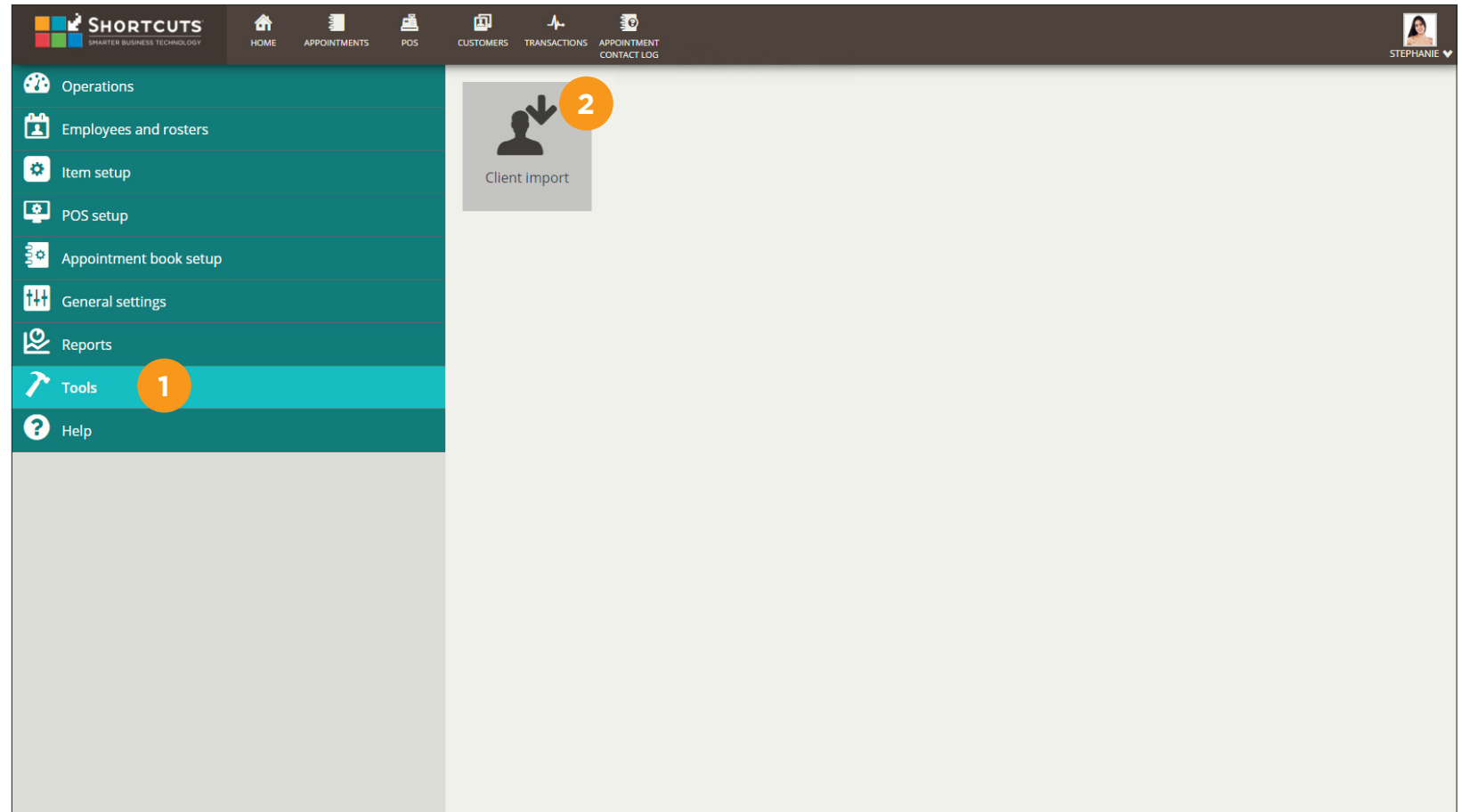
IMPORTING CLIENT DATA

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.

The screenshot shows the 'client import' page in the SHORTCUTS application. The header bar includes the SHORTCUTS logo and navigation links: HOME, APPOINTMENTS, POS, CUSTOMERS, TRANSACTIONS, and APPOINTMENT CONTACT LOG. A user profile for STEPHANIE is visible in the top right. The main content area is titled 'client import' and 'Import new clients'. It contains three steps: Step 1 (Download spreadsheet template for new customers. with a 'Download template' button), Step 2 (Add new customers to the spreadsheet.), and Step 3 (Upload the spreadsheet. with a 'Choose file' button). An orange circle with the number 3 is overlaid on the 'Download template' button. A 'BACK' button is located at the bottom left.

SHORTCUTS
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HOME APPOINTMENTS POS CUSTOMERS TRANSACTIONS APPOINTMENT CONTACT LOG

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](#)

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.

client import (1) - Excel

Stephanie Heslop

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
1	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	
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8

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

9

Select the client data file.

10

Click **open**.

The screenshot shows the 'client import' page in the Shortcuts Live application. The page has a dark header with the 'SHORTCUTS' logo and navigation links: HOME, APPOINTMENTS, POS, CUSTOMERS, TRANSACTIONS, and APPOINTMENT CONTACT LOG. A user profile 'STEPHANIE' is in the top right. The main content area is titled 'client import' with the subtitle 'Import new clients'. It contains three steps: Step 1 (Download spreadsheet template for new customers. with a 'Download template' button), Step 2 (Add new customers to the spreadsheet.), and Step 3 (Upload the spreadsheet. with a 'Choose file' button). An orange circle with the number '8' is placed over the 'Choose file' button. Below the page, a Windows File Explorer window is open, showing the 'Desktop' location. It contains two files: 'ISetupPrerequisites' and 'Peppermint Park Client List'. An orange circle with the number '9' is placed over the 'Peppermint Park Client List' file. The File Explorer's 'File name' field contains 'installs_com.shortcutssoftware.mysalon.vsbarkershop_201604_cour' and the file type is set to 'Microsoft Excel'. An orange circle with the number '10' is placed over the 'Open' button at the bottom right of the File Explorer window.

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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](#)

BACK

Open

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

ISetupPrerequisites

Peppermint Park Client List

File name: installs_com.shortcutssoftware.mysalon.vsbarkershop_201604_cour Microsoft Excel

Open 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.



HOMEAPPOINTMENTSPOSCUSTOMERSTRANSACTIONSAPPOINTMENT CONTACT LOG


STEPHANIE


client import


Preview

Please review the following example import for correctness.

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		stephanie@email.com	25 Rose Terrace		Stafford	MI	54321
Peter	McDonald	0433 333 333		peter@email.com	3 Sunny St		Ashgrove	GA	112233

 BACK

 CANCEL


 CONTINUE

C

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

12

Click **import clients** to continue.

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STEPHANIE

client import

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


BACK
(javascript:void(0))


CANCEL


IMPORT
CLIENTS


12


D You will be notified if the import is successful.


 **SHORTCUTS**
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
 HOME


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STEPHANIE ▼

client import

Import completed with no errors. **D**

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