

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

SHORTCUTS FUSION

CLIENTS

EXPORTING CLIENT DETAILS

HOME & MOBILE

BEAUTY



SHORTCUTS

SMARTER BUSINESS TECHNOLOGY

it suits you

Last updated 30 November 2016

By Erin Lewis

Product: Shortcuts Fusion

Software version no: 8.0.19.1

Document version no: 1.1

Country: Australia

CONTENTS

- EXPORTING CLIENT DETAILS 1**
- OPENING THE CLIENT LIST IN EXCEL..... 3**

ABOUT THIS DOCUMENT

This document will guide you through the process of exporting client details using the marketing tool. This will allow you to export custom client lists based on your desired search criteria. You can then open the client details in a Microsoft Excel spreadsheet.

EXPORTING CLIENT DETAILS

- 1 Click on the **tools** menu.
- 2 Click on the **marketing** icon.
- 3 Enter your desired search criteria.
- 4 Click the **compute** button to generate the list of clients.

The screenshot shows a software interface with a sidebar on the right and a main content area. The sidebar contains a 'SHORTCUTS' menu with items: Main, Tools (1), Reports, Backup, Marketing (2), Roster, Log, Attendance, Support and Login, Stock, Setup, and a user profile for Anna Owey with a Log Off button. The main content area is divided into several sections. At the top, there are two search filters: 'And the combination for services done' (unchecked) and 'And the combination for service not done' (checked). Each filter has a search input field with a '3' callout. Below the filters are two identical panels, each with 'Companies', 'Products', 'Lines', and 'Delete All' buttons. To the right of these panels are 'Categories' and 'Services' buttons, with 'Delete All' and 'Delete' buttons below them. At the bottom left, there is a 'Clients Restricted To ...' dropdown menu set to 'All Clients', with 'Clients' and 'Clear' buttons. At the bottom right, there are 'Start Date' and 'End Date' input fields, a 'Range' button, and a row of buttons: 'Compute' (4), 'View', 'Mail', 'Set - Forget', and 'Done'.

- 5** If you wish to exclude certain clients from the list, tick the relevant boxes in the **exclude** section.
- 6** When you are ready to export the list, click **save**. A new window will appear.
- 7** Ensure that **include column headings** is ticked.
- A** By default, the file will be named **client list**, followed by today's date. You can change the file name here if you wish to.
- B** By default, the file will be saved under the **C:\Program Files\Shortcuts Software\Point Of Sale\Letters** directory. If you want to save the file in this location, simply click **save**.
- 8** If you want to save the file in a different location, click **browse**. A new window will appear.
- 9** Select your desired save location.
- 10** Click **save**.

Clients Selected by Marketing

Search For...

Delete

Sort By...
 Last Name
 First Name

ANDREWS, Hannah	A	M	Y
CHRISTIANSEN, Suzie	B	N	Z
CLARKE, Rachael	C	O	0
COOPER, Hailey	D	P	1
DAVIES, Jessica	E	Q	2
DOYLE, Tanya	F	R	3
FITZPATRICK, Andrew	G	S	4
FITZROY, Joanna	H	T	5
FREEMAN, Louis	I	U	6
GIBSON, Talia	J	V	
HAYWOOD, Cassandra	K	W	
JONES, Kayla			
MCDONALD, Harrison			
NEILSON, Tammy			
SAUNDERS, Andrea			
STEVENSON, Claire			
STEVENSON, George			
STEVENSON, Gina			
STEVENSON, Zoe			
TAM, Alana			
TAM, Dayna			
THOMAS, Emma			

Exclude
 No address
 No phone
 Children
 No email **5**
 No mobile
 Existing Appointment

Results 22

6
 Save

Open

Generate

Print

Save the Client List As:

A

Include column headings **7**

8
 Browse

B
 Save

Cancel

Browse for Folder

- > OneDrive
- > This PC
 - > Downloads
 - > Desktop **9**
 - > Documents
 - > Music
 - > Videos
 - > Pictures
 - > Archive Drive (A:)
 - > Windows (C:)
 - > Education Drive (G:)
 - > Common Drive (H:)
 - > Client Services Drive (J:)
 - > Prof Services Drive (K:)
 - > Marketing Drive (M:)
 - > SSC Drive (N:)

10

SHORTCUTS
3:07 PM
Wed, 30 Nov '16

Main

Tools

Reports

Backup

Marketing

Roster

Log

Attendance

Support and Logins

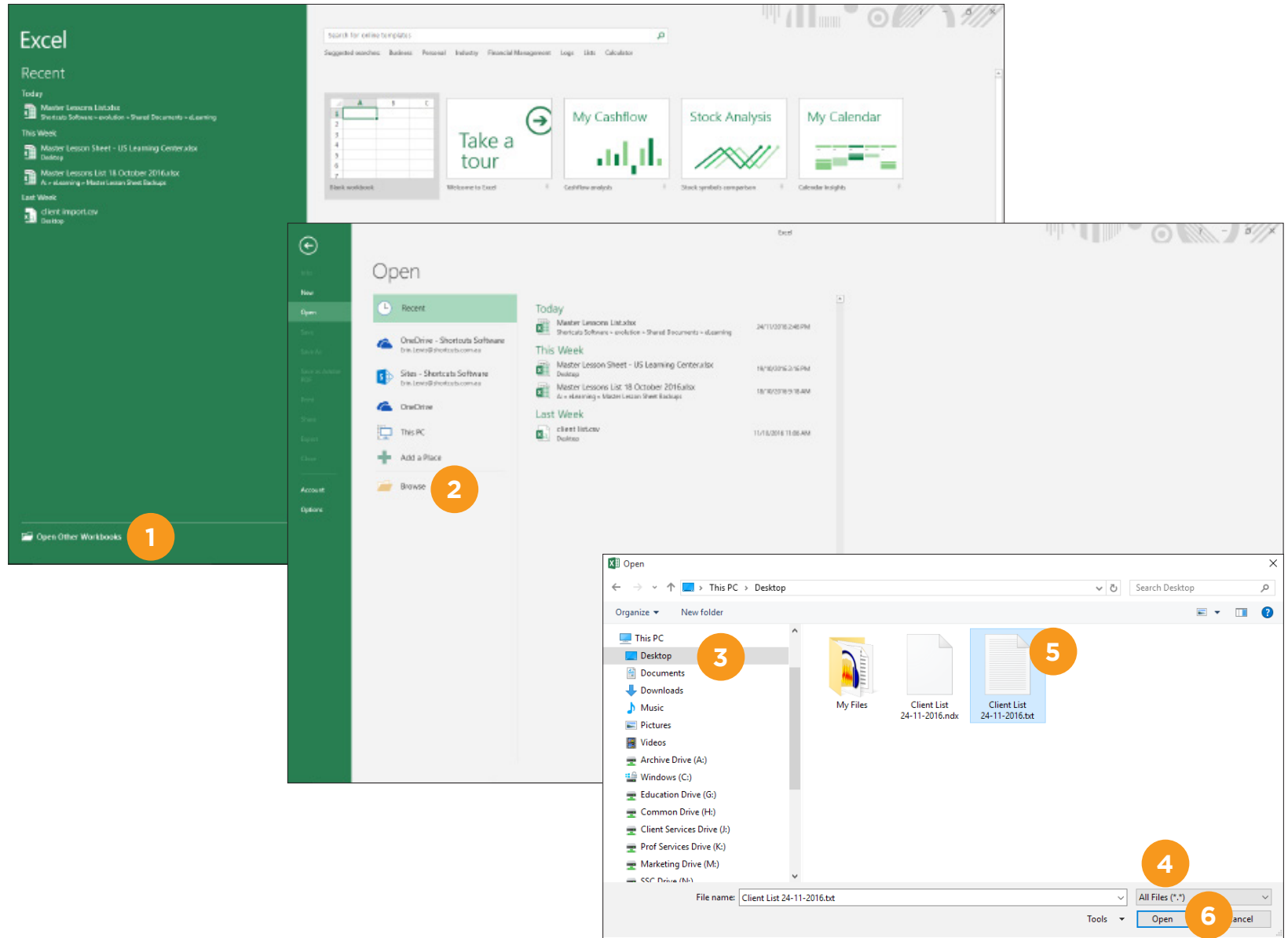
Stock

Setup

Anna Owner
 Log Off

OPENING THE CLIENT LIST IN EXCEL

- 1 Open **Excel** and click on **open other workbook**.
- 2 Click **browse**.
- 3 Navigate to the location where you saved the file.
- 4 Select **all files** from the drop-down list. This will allow you to see all types of files.
- 5 Select the client list file. This will be a **.txt** file.
- 6 Click **open**.



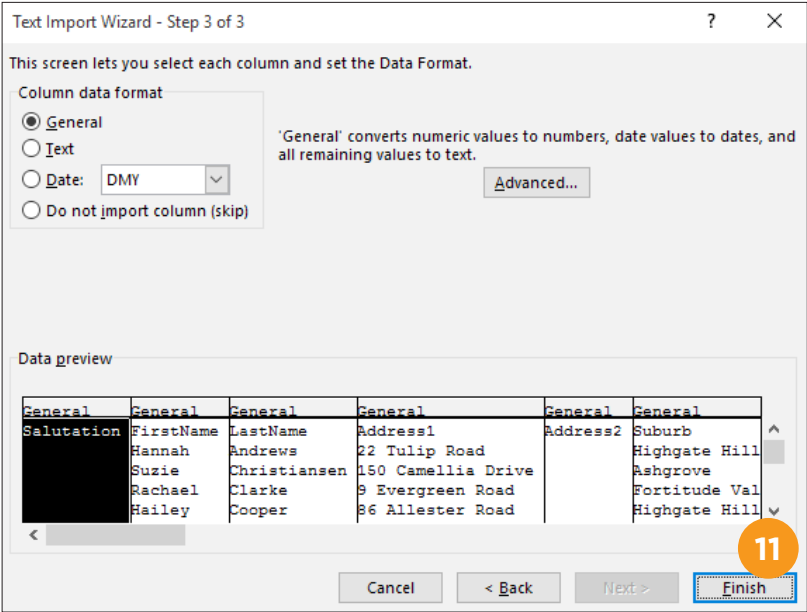
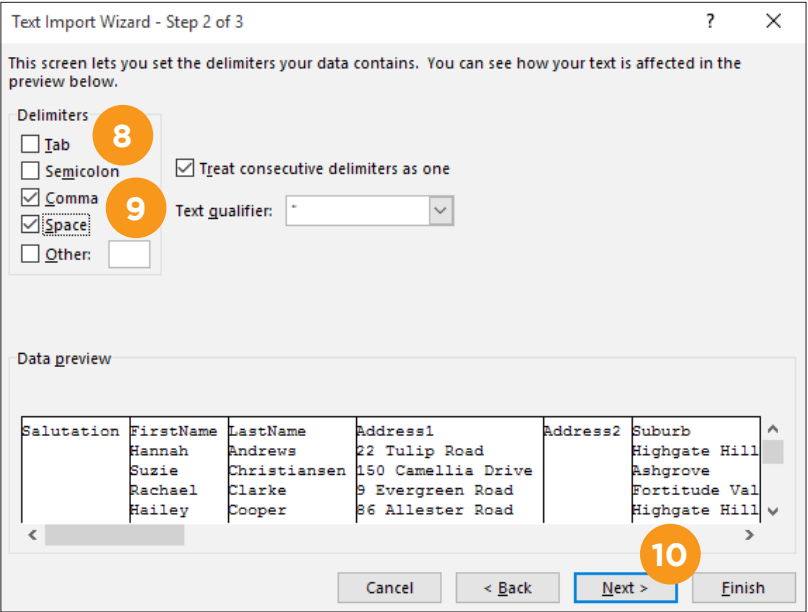
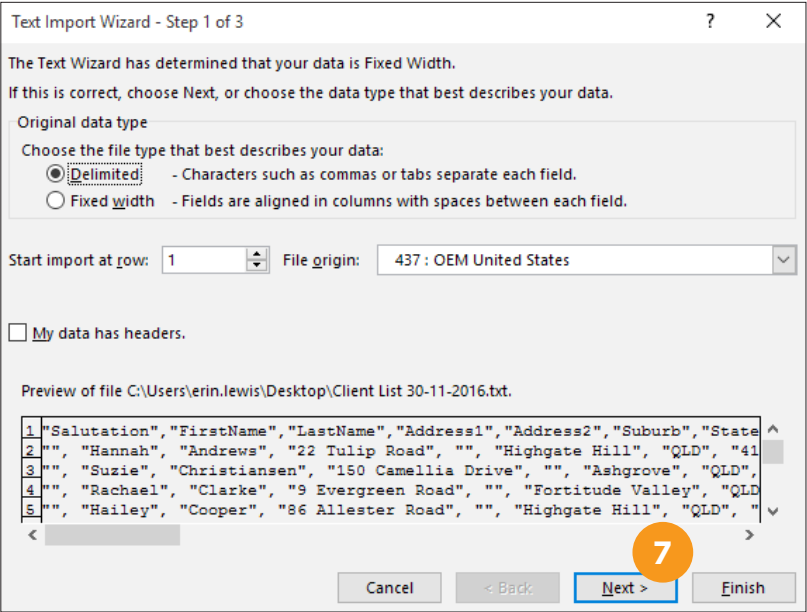
7 The **text import wizard - step 1 of 3** window will appear.
Click **next**.

8 The **text import wizard - step 2 of 3** window will appear.
Untick the **tab** box.

9 Tick **comma** and **space**.

10 Click **next**.

11 The **text import wizard - step 3 of 3** window will appear.
Click **finish**.



A Once the file has opened in Excel, it should look something like this.

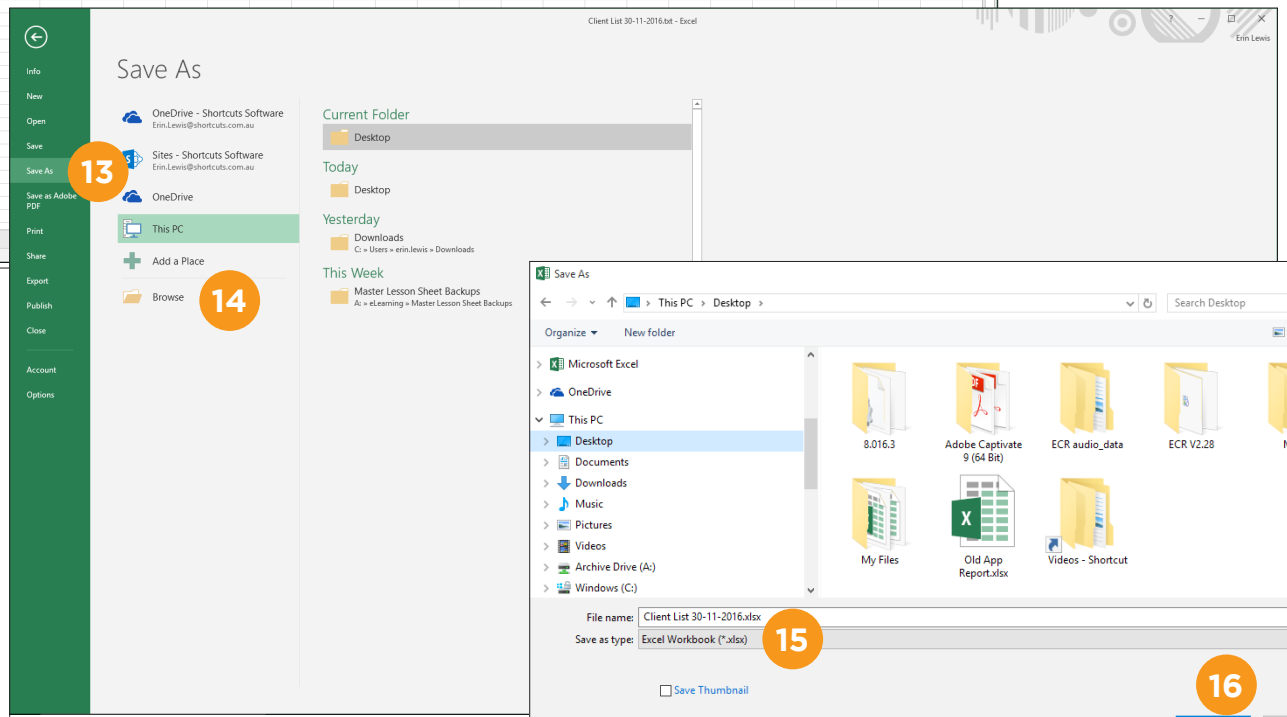
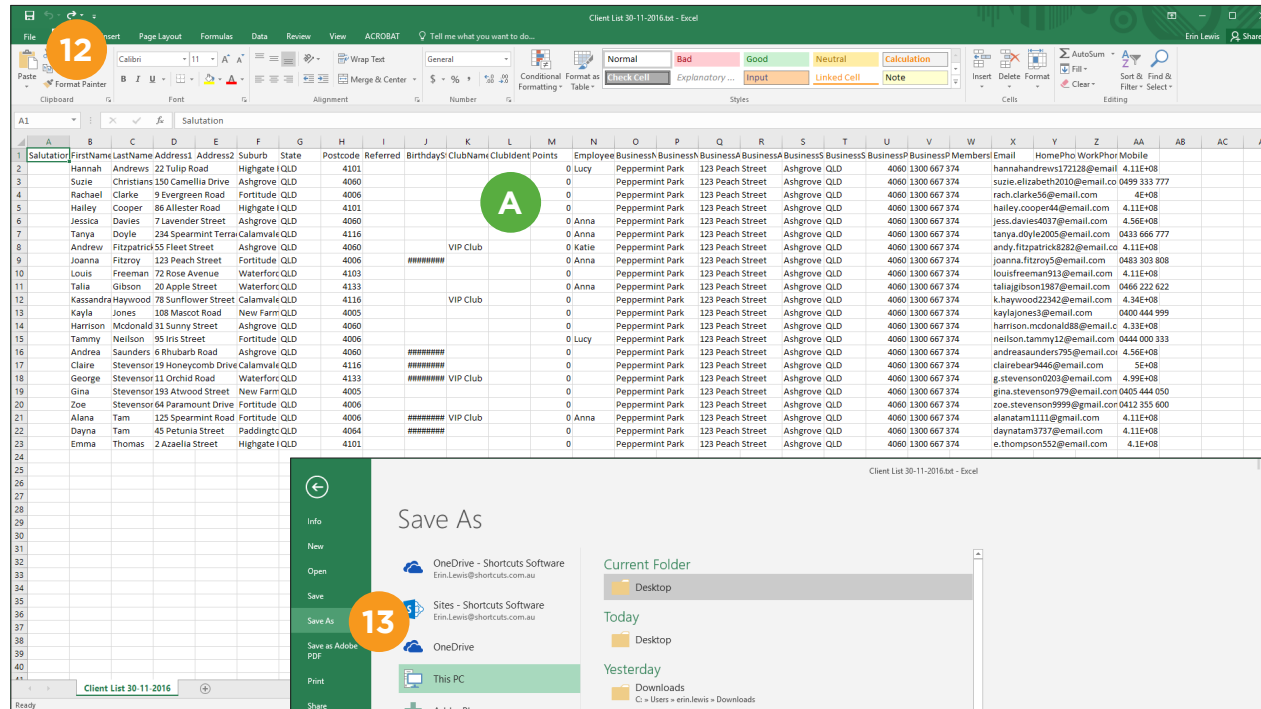
12 We recommend saving the file as an Excel workbook. To do this, click **file**.

13 Click **save as**.

14 Click **browse** and select your desired save location.

15 From the **save as type** drop-down list, select **excel workbook**.

16 Press **save**.



B

You can now copy and use the information in the spreadsheet as required.

!

If you are going to use this list to bulk email your clients, we recommend copying and pasting the email addresses into the **BCC** field of the email. This will prevent clients from seeing each other's email addresses. In the **to** field, you can enter your own email address so that you receive a copy as well.

The screenshot displays two windows. The top window is Microsoft Excel, titled 'Client List 30-11-2016.xlsx'. The spreadsheet contains the following data:

Salutation	FirstName	LastName	Address1	Address2	Suburb	State	Postcode	Referred	Birthdays	ClubName	ClubIdent	Points	Employee	BusinessN	BusinessS	BusinessA	BusinessS	BusinessP	Members	Email	HomePho	WorkPho	Mobile
	Hannah	Andrews	22 Tulip Road		Highgate	QLD	4101						0 Lucy	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	hannahandrews172128@email.c		4.11E+08	
	Suzie	Christians	150 Camellia Drive		Ashgrove	QLD	4060						0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	suzie.elizabeth2010@email.co		0480 333 777	
	Rachael	Clarke	9 Evergreen Road		Fortitude	QLD	4066						0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	rach.clarke56@email.com			
	Hailey	Cooper	86 Allester Road		Highgate	QLD	4101						0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	hailey.cooper44@email.com			
	Jessica	Davies	7 Lavender Street		Ashgrove	QLD	4060						0 Anna	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	jess.davies4037@email.com			
	Tanya	Doyle	234 Spearmint Terrai		Calamvale	QLD	4116						0 Anna	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	tanya.doyle2005@email.com		0433 666 777	
	Andrew	Fitzpatrick	55 Fleet Street		Ashgrove	QLD	4060			VIP Club			0 Katie	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	andy.fitzpatrick8282@email.co		4.11E+08	
	Joanna	Fitzroy	123 Peach Street		Fortitude	QLD	4066		#####				0 Anna	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	joanna.fitzroy5@email.com		0483 303 808	
	Louis	Freeman	72 Rose Avenue		Ashgrove	QLD	4103						0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	louisfreeman913@email.com		4.11E+08	
	Talia	Gibson	20 Apple Street		Waterforc	QLD	4133						0 Anna	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	taliajgibson1987@email.com		0466 222 622	
	Kassandra	Haywood	78 Sunflower Street		Calamvale	QLD	4116			VIP Club			0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	k.haywood22342@email.com		4.34E+08	
	Kayla	Jones	108 Mascot Road		New Farm	QLD	4005						0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	kaylajones3@email.com		0400 444 999	
	Harrison	Mcdonald	31 Sunny Street		Ashgrove	QLD	4060						0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	harrison.mcdonald88@email.c		4.33E+08	
	Tammy	Nelson	95 Iris Street		Fortitude	QLD	4006						0 Lucy	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	nelson.tammy12@email.com		0444 000 333	
	Andrea	Saunders	6 Rhubarb Road		Ashgrove	QLD	4060		#####				0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	andreasanders795@email.co		4.56E+08	
	Claire	Stevensor	19 Honeycomb Drive		Calamvale	QLD	4116		#####				0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	clairebear9446@email.com		5E+08	
	George	Stevensor	11 Orchid Road		Waterforc	QLD	4133		#####	VIP Club			0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	g.stevensor2023@email.com		4.99E+08	
	Gina	Stevensor	193 Atwood Street		New Farm	QLD	4005						0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	gina.stevensor979@email.com		0405 444 050	
	Zoe	Stevensor	64 Paramount Drive		Fortitude	QLD	4006						0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	zoe.stevensor999@gmail.com		0412 355 600	
	Alana	Tam	125 Spearmint Road		Fortitude	QLD	4066		#####	VIP Club			0 Anna	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	alanatam1111@gmail.com		4.11E+08	
	Dayna	Tam	45 Petunia Street		Paddingtc	QLD	4064		#####				0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	daynatam3737@email.com		4.11E+08	
	Emma	Thomas	2 Azaelia Street		Highgate	QLD	4101						0	Peppermint Park	123 Peach Street	Ashgrove	QLD	4060	1300 667 374	e.thompson552@email.com		4.1E+08	

The bottom window is Outlook, titled 'Untitled - Message (HTML)'. The 'Send To' dialog box is open, showing the 'Bcc' field populated with the email addresses from the spreadsheet. A red exclamation mark icon is placed over the 'Bcc' field.



SHORTCUTS™

SMARTER BUSINESS TECHNOLOGY

it suits you

AUSTRALIA AND ASIA

166 Knapp Street
Fortitude Valley
QLD 4006
Tel: +61 7 3834 3232

www.shortcuts.com.au

UK AND EUROPE

Dalton House
Dane Road, Sale
Cheshire M33 7AR
Tel: +44 161 972 4900

www.shortcuts.co.uk

NORTH AMERICA

7711 Center Avenue
Suite 650
Huntington Beach CA 92647
Tel: +1 714 622 6682

www.shortcuts.net

HAIR | BEAUTY | CLINIC | SPA | BARBER | WALKIN | SCHOOL | MULTI-SITE