

Importing Clients with 123Pet Software

Overview

123Pet Software allows you to import lists of information that were created using other programs (such as another database program, Microsoft Excel, etc.).

A separate file is required for each list of information that can be imported and must be specially formatted.

Files must be saved in any one of the following formats:

- .txt (comma or tab delimited)
- .csv (comma or tab delimited)
- Excel, .xls
- Word, .doc
- Access
- Outlook
- We are also able to import quite a few other formats. E-mail support@daysmart.com if you would like to see if your format can be imported.

If you are using a format other than a .txt file, you must first convert your information to a text only .txt file. Most files (.csv, Outlook, Excel, Word, Access, etc.) are usually pretty easily converted to text files. The format for the individual .txt files is listed under the individual **Importing** sections.

Column Headers

Column Name	Description	Type	Example
FirstName	First Name	Text	Mary
LastName	Last Name	Text	Smith
Address	Address	Text	123 Anystreet
Address2	Second line of address	Text	Apt. 201
City	City	Text	Anytown
State	State	Text	California
Zip	Zip or postal code	Text	12345-6789
E-Mail	E-mail address	Text	mary@email.com
HomePhone	Home phone number	Text	(555) 555-1212
WorkPhone	Work phone number	Text	(555) 555-1212
CellPhone	Cell phone number	Text	(555) 555-1212
Gender	Gender	Text (M for male, F for female)	F
Comment	General client comment	Text	Has two children
Class	Class or category. Short phrase describing the type of service the client frequents	Text	Tan
DateOfBirth	Date of birth	Date	2/1/1975

Anniversary	Date of anniversary	Date	5/7/1998
TotalVisits	Total number of visits	Number	54
FirstVisit	Date of first visit	Date	3/4/1997
LastVisit	Date of last visit	Date	10/5/2011
Mailing	Indicates if the client wants to receive mail or not	Text (TRUE for yes, FALSE for no)	FALSE
FirstEmployeeName	Name of the first employee to provide service to the client	Text	Bill Rogers
FirstEmployeeID	ID of the first employee to provide service to the client	Number	100
LastEmployeeName	Name of the last employee to provide service to the client	Text	Jenny Johnson
LastEmployeeID	ID of the last employee to provide service to the client	Number	101
Balance	Balance the client owes. Positive number means the client owes money, negative number means the client has credit to use	Number	19.95
BalanceComment	Comment describing the balance	Text	Owes \$19.95 from 10/2/2011 visit
ProductDiscountPercent	Default discount percentage on products	Number	10
ServiceDiscountPercent	Default discount percentage on services	Number	0
Link	Path and name of a file related to the client.	Text	c:\My Documents\Bill.xls
ClientHistory	Notes or other history	Text	Use color formula #123. Let set extra 5 min.
ClientID	ID number for the client	Number	1000
Title	Title before name, i.e. Mr., Mrs., Dr., etc.	Text	Mrs.
Item	The unit assigned from the Options - Clients tab	Text	sessions
ItemComment	Comment for the item described above	Text	Comments
IDCard	ID card number for the client	Number	1000

Example

A spreadsheet file might look like this:

FirstName	LastName	Address	City	State	Zip	HomePhone
Mary	Johnson	123 Myroad	Anytown	CA	12345	(555) 555-1212
Dylan	Warren	456 West Ave.	Beverly Hills	CA	90210	(555) 555-1212
Judy	Guller	7890 Parrot Drive	Lakeview	AZ	91875	(555) 555-1212

Directions

1. Save your information as a text-only tab delimited file.
2. Select **Import**, then **Clients** from the **File** drop-down menu.
3. Follow the prompts.
4. 123Pet Software will automatically import your file and, depending on preferences, either add it to your existing list of clients, or overwrite your current list of clients with the imported file.