XLS Uploader Web-App, from RetailCP, is a fast and easy way to import
Customer details list to Clover.

A lot faster than typing in those details.

Merchants can use XLS Uploader as many times as they wish on the same
one merchant account, at no added cost. Pay once-off sign-up fee only.

Updated app version dated May 27th 2018. Improved new features:

- Can specify Opt In for "Marketing Allowed"
- Can include a "Note" field-column with maximum 2,000 characters of text
with each Customer.
- Can include empty Rows & Columns on XLS list. Uploader will ignore those.
- Can re-arrange Columns on XLS list in different order-sequence
    - Must use identical 'header texts' as in Sample XLS;
    - [First Name] [Last Name] [Email] [Phone] etc.

Can import 3,000 or more customer records with one XLS list.

Time to upload is based on Clover.com which imports one customer at-a-time.

If Clover.com system is extremely busy, it may take longer to upload.

Can remove all existing customer records with one button request,

If existing details need to be amended on all records. See FAQ no 2.

Support. Please email to app@retailcp.ie for any questions not explained in
user notes below, or in FAQ notes on website.

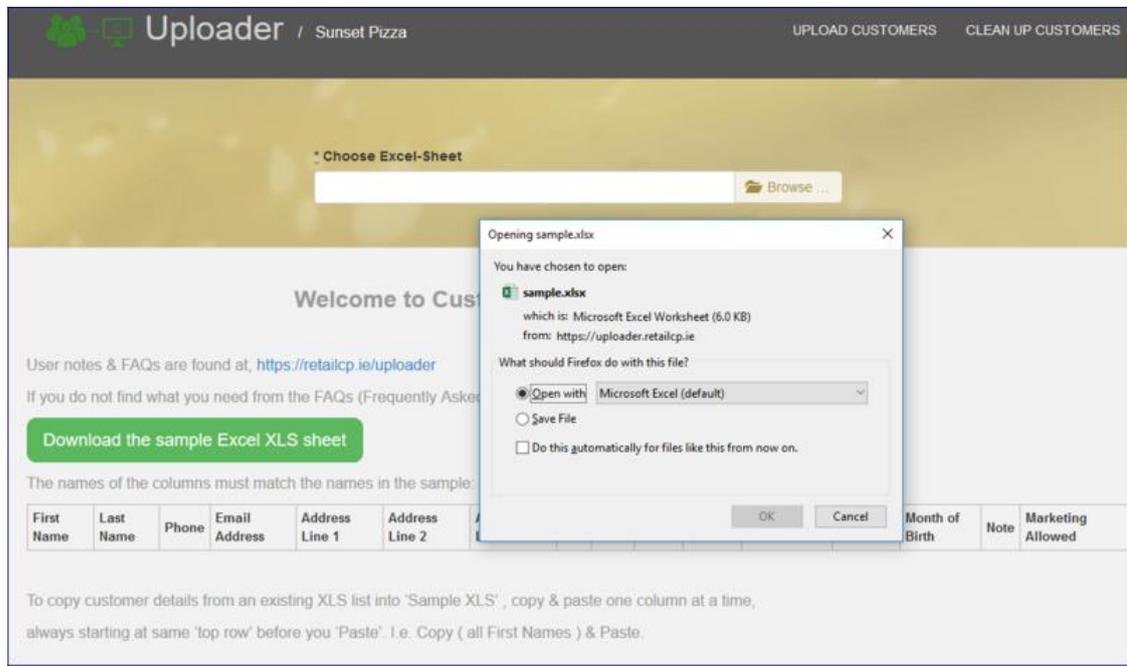More RetailCP Apps are detailed at https://retailcp.ie/

Restaurant Display & Fast Food Orders display Apps

Charge-To-Invoice with integrated A-R accounts, and Payments-On-
Account, for USA Clover only, is due for release end June 2018.

Thank you for using XLS Uploader.

Using Uploader:

1.   When you have purchased 'XLS Uploader' from the Clover App Market,
     App icon will appear on your Clover Dashboard. **Select the Icon.**
     Web-page which opens has a (Download Sample XLS) link-button.

Download the **sample XLS.**

Two ways to use our sample XLS:

(A) Copy-paste details, one column at a time, from existing list & paste into
     sample XLS. Always start with same top row cell (box) before 'Paste'. Save
     XLS list to 'Customers' folder.
        OR
 (B) Open existing XLS list and replace column header text by copying identical
     'header texts' from Sample XLS onto upload list: i.e. [First Name] [Last
     Name] [Email] [Phone] [Address lines] etc.

     Save prepared list to PC-Laptop to a 'Customers folder', that you can easily
     find to 'Upload'. We support 'XLSM' 'XLSX' 'XLS' standard file formats.

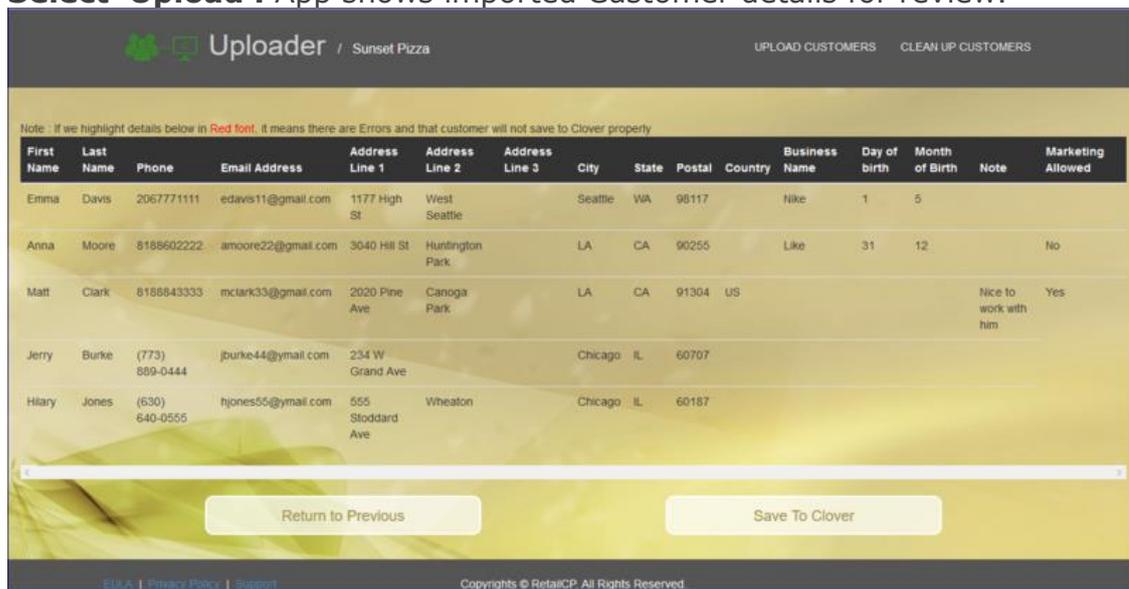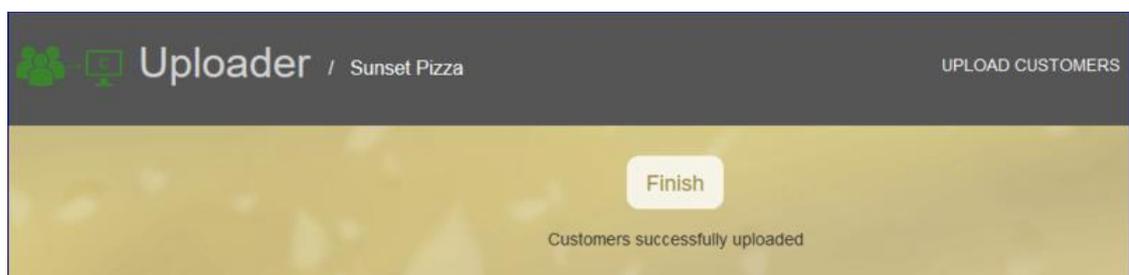2. To upload XLS customer list, open 'Uploader' Icon on Clover Dashboard. Select **'Browse'** & XLS list (file-name) on your PC documents folder.
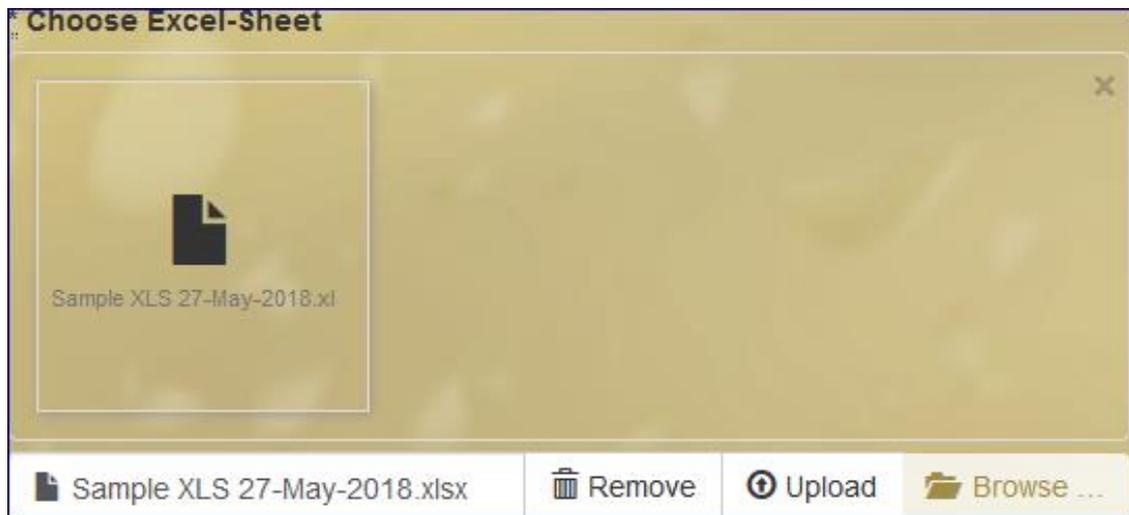
Select 'Upload'. App shows imported Customer details for review.

If customer details are all correct, select **'Save to Clover'**


Select **'Finish'** to return to XLS Uploader main page-screen.

App verifies XLS list content before you 'Save to Clover'. App highlights in RED any customer records which need be corrected.
If 'Country' has more than 2-letters, Uploader displays error text in Red.
If 'Note' has more than 2,000 characters, Uploader displays text in Red.

If customer details need to be amended, select 'Return to Previous'.
Edit XLS where any customers details are highlighted in **Red text.**

Save that XLS file, return to 'Uploader' screen, select 'Remove' (so as not to use errored list).

Re-select 'Upload' to import corrected XLS file.

View & Verify all details are correct & confirm **'Save to Clover'**.

If you confirm **'Save to Clover'** before you correct customers marked in Red text, App will upload all other customer details & will ignore-skip those highlighted in **Red text.**

3. To monitor that customer names are being uploaded, open 'Customers' on your Clover account & select 'refresh' every 2-minutes.
    Refresh is the 3rd symbol from left after '<-' & '->' below:

Open 'Customers' & Refresh.
Clover dashboard will show the most recent customer added on top.

Name		Phone Number	Date Added
	Hilary Jones hjones55@ymail.com	(630) 640-0555	27-May-2018 1:04 pm
	Jerry Burke jburke44@ymail.com	(773) 889-0444	27-May-2018 1:04 pm
	Matt Clark mclark33@gmail.com	8188843333	27-May-2018 1:04 pm

Above names are invented.

4. To verify all names have been imported, use Clover 'Export' to generate an XLS list including names entered manually & imported via Uploader. On Clover online dashboard as below, open 'Customers' & select 'Export'.
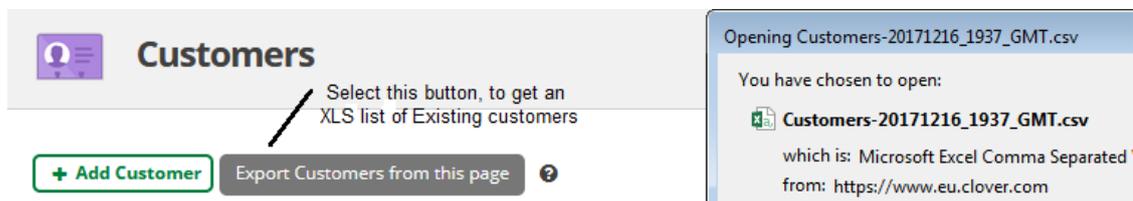
5. Tips on fixing simple issues with XLS lists

XLS Uploader automatically removes spaces from post codes,
because Clover does not accept spaces or characters within Postal codes.

XLS Uploader automatically removes-ignores empty Rows & Columns.

Always format phone numbers as 'Text' to include leading 'zero.

If you need to include 'Country code', Clover accepts '2 characters' only.
'US' for United States ; 'IE' for Ireland & 'GB' or 'UK' for Gt-Britain.
Uploader will highlight in **RED** if 'Country' text has more than 2-letters.
And shows 'Note' text in **RED** if more than 2,000 characters are added.

6. To remove all existing Customer records:

If existing details need to be changed or 'Notes' added to all or most records, use the Uploaded app to remove all existing customers from Clover account and upload a new revised list of 'all' customers:
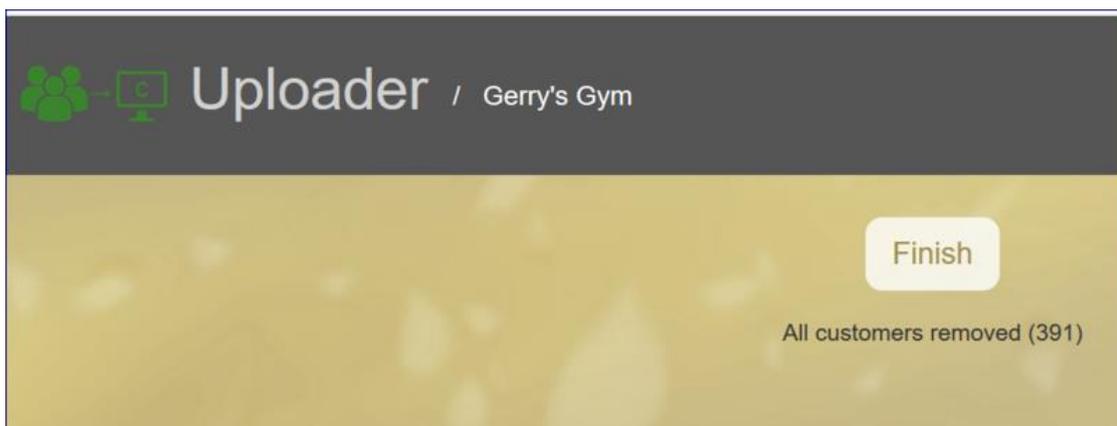
Select the 'Clean Up Customers' button, top right of screen.
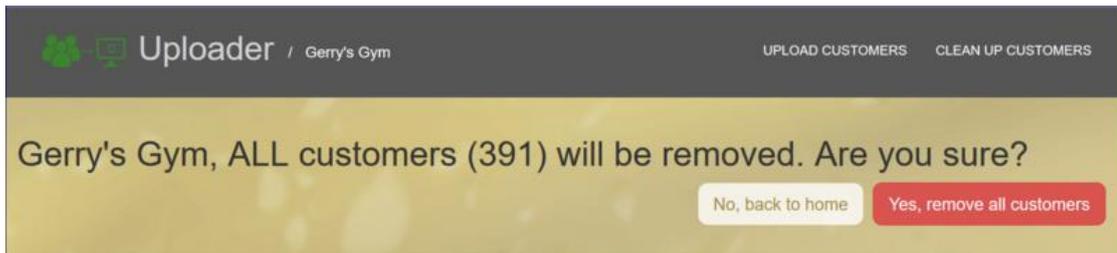
Confirm 'Yes, remove all customers'
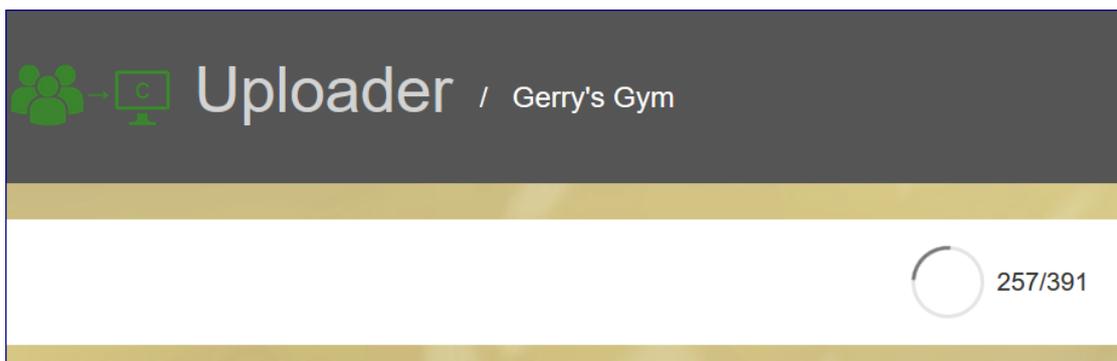
Web-app will show progress as it removes all customer records.

Select '**Finish'** to return to main Uploader page. Can upload a new list.