

How to upload your client list

A STEP BY STEP GUIDE

① Prepare your list

So you already downloaded our template. To edit it, you need to open it with Excel, Google Spreadsheets or any software to edit spreadsheets, such as Apple Numbers.

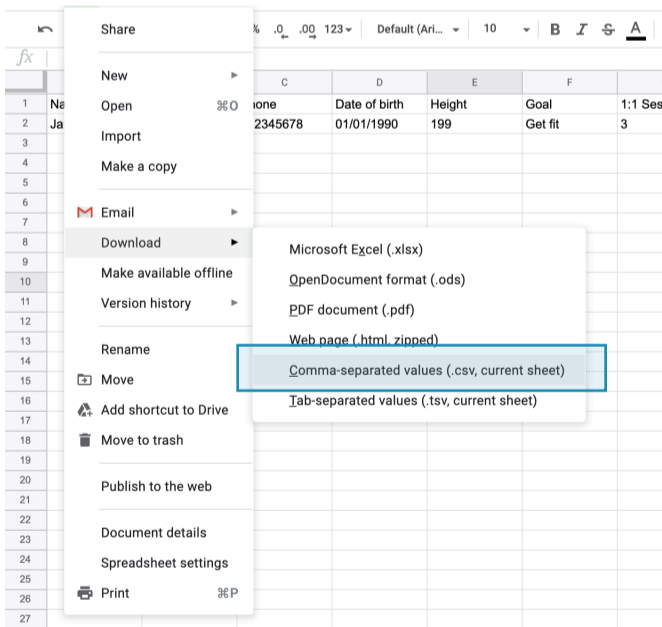
Alternatively, you can create your own list from scratch. The columns it should contain to import your clients with the most complete data are the following:

Name	Email	Phone	Date of birth	Height	Goal	1:1 sessions	Group sessions
			Format 31/12/1990	In cm, eg 180		Number of sessions done	Number of sessions done

Make sure to name your columns as above so our software can process it correctly. You don't have to fill out all the fields and you can add as many clients as you like (at least 1).

② Export your data

Once you're ready, you need to export your list as a CSV file. Usually you can do that in the File menu of your editor, like so:



Save the file to your hard drive and go back to PT Mate in your browser. To upload the file, select it ("Choose a CSV file"), wait until the progress bar disappears and click IMPORT CLIENT LIST.