



## Upload Guide

Use these two spreadsheets to upload your contacts, pools and products. Anything in the import sheet in yellow, means that this column can only contain this information. For some things (EG Sanitiser and Surface type you can go into the portal and add more options.

### Pools / Contacts upload

Use this sheet to upload all of your contact and pool information, and link them together.

#### Contacts

This is where you insert your customer information. Don't worry you can update it in the app later.

contact\_id should be sequential numbers starting at 1

#### Pools

This is where you enter all pool information. The options for the different columns are in yellow.

The only mandatory fields are

- pool\_id (should be sequential numbers starting at 1)
- pool\_type
- address\_street\_one
- address\_city
- address\_state
- address\_postcode

So your tech can fill out the other information on site.

#### Pools Contacts Relations

This tab is where you link pools to contacts. You can link as many pools to contacts, or contacts to pools. The options for relation\_type are listed in yellow.

### Products upload

#### Products

Add all your products here.

- Unit options are highlighted in yellow
- If the price you entered is GST inclusive, put '1' in gstincluded. If it is an exclusive of GST price, put 0
- product\_id should be sequential numbers starting at 1

#### Chemicals

If there is no import file for your supplier, it will be easier just to import the chemicals and link them manually to dosage groups in the app. If you use multiple suppliers, upload each supplier sheet individually.

1. Open supplier import sheet and go to the Products tab
2. Edit pricing and delete any products you don't use
3. Go to the ChemicalDosages and ObservationDosages tabs and delete anything marked "Delete"
4. Delete the "What to do" column from the ChemicalDosages and ObservationDosages tabs
5. Upload the file

Repeat for each supplier import file