

The Print Tracker 'Customer List Import' feature is a GREAT way to make certain deployments are scheduled and completed in a timely manner. Dealers often want a way to add a list of businesses into Admin so that customers are not forgotten. The feature also makes it easy to transition from other solutions.

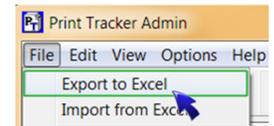
'Customer List Import' works in conjunction with installation options "One-Click, USB key, Custom Deployment Link, and command-line deployment. Export/import permits dealerships to easily implement Print Tracker to gather meters, supply information, and service alerts. The Customer List Import comes as a standard feature in the Print Tracker Admin utility.



'Customer List Import' populates the Print Tracker customer list with the dealer's customer list, which then serves as a placeholder or reminder to let dealers know of customers or locations where deployments still need to occur. Combined with One-Click deployment, customers can be sent site specific deployment steps via email to quickly get Print Tracker monitoring their fleet.

Follow the steps below to import a customer list into Print Tracker Admin:

1. Open Print Tracker Admin.
2. Select the "Installations" tab
3. In the upper left, click on 'File'.
4. Click 'Export to Excel'.



This will open an Excel spreadsheet to use as a template.

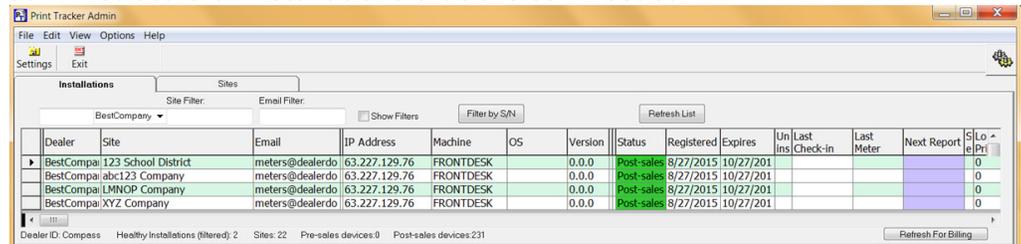
5. Minimize column widths to "2", then expand 'Site', 'Email' and 'Contact Info' columns. (This makes it easier to work with needed columns.)
6. Delete all rows except row 1 containing the column headings
7. Enter (or merge from another file) customer identifying information into the file fields 'Site', 'Email' and 'Contact Info' (leave the remaining fields blank).

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Pr	Co	Site	Ali	Email	Ma	OS	Ve	Re	St	Lic	Exp	Lat	Last	Ne	Lo	Ne	Contact Info
2			abc123 Company		meters@dealerdomain.com													Mary Smith (123) 456-7890 ms@abc123.com
3			LMNOP Company		meters@dealerdomain.com													John Doe (123)456-7891 jd@lmnop.com
4			123 School District		meters@dealerdomain.com													Chaz Vu (123) 456-7892 jpeters@123.edu
5			XYZ Company		meters@dealerdomain.com													Kelly Jones (123) 456-7893 IT@xyx.com

8. Save the spreadsheet noting its name and location.
9. Open Print Tracker Admin.
10. Select the "Installations" tab.
11. In the upper left, click on 'File'.
12. Click 'Import from Excel'.
13. Select the saved Excel spreadsheet that contains the list of installations to import. New customer listings will appear in Print Tracker Admin.



NOTE – The line items with empty fields serve as "placeholders" to remind administrators of installations that are still needed.



- ✓ Prepare USB keys and send sales and service staff on-location to complete installations.
- ✓ Right-click on any listing and use the 'Send deployment email' ("One-Click" Deployment) option to complete installations from your office.

14. Once installations are completed, be sure to 'Shutdown' the "placeholder" line listing to remove the no-longer-needed reminder from the list.

Guidelines when installing Print Tracker Pro to gather meters and device information:

1. About 50-65% of all installations will be completed while on location during normal site visits for device maintenance and support, courtesy calls and account reviews ... trips the staff would be making as a normal course of business. Typical software deployment using a USB drive takes about 3-5 minutes. The ability to load USB keys with installation files from Admin is an upgrade option.
 - ✓ Installation can be accomplished during routine service calls.
 - ✓ Installation can be accomplished during routine supply fulfillment calls.
 - ✓ Installation can be completed during sales calls.See <http://printtracker.net/downloads/PrintTracker - Loading USB Keys from Admin.pdf>.
2. Another 20-30% of the installs are typically technical in nature and may require on-location IT involvement to overcome device, security and/or other network concerns. These could be the dealership's best and largest customers and may include installation locations where imaging devices are located on multiple IP addresses or strings. Provide these customers with a personal level of service.
 - ✓ Have a technician complete the deployment if it is expected that the installation will be challenging.
 - ✓ Installation assistance should be available to customers from service managers and/or IT specialists.
 - ✓ Installation assistance is available to the customer from Print Tracker if needed.See <http://printtracker.net/downloads/Print Tracker - Installation Support Assistance.pdf>.
3. The remaining 5-30% will be simple deployments at customer locations where machines are already place, and print volumes and business machine usage would be considered normal, or within the capability of the machines placed. Installations at these locations could be initiated from within the office by an administrator sending an email that includes a deployment link. The administrator could simply call the customer and walk them through a simple install. The ability to send email instructions is an upgrade option.
 - ✓ Installation is completed by the customer using a deployment link sent via email.
 - ✓ Installed software is pre-configured.

See details in the links below:

<http://printtracker.net/downloads/PrintTracker - One-Click Deployment.pdf>

[http://printtracker.net/downloads/PrintTracker - \"One-Click\" Deployment Best Practices.pdf](http://printtracker.net/downloads/PrintTracker - \)

<http://printtracker.net/downloads/PrintTracker - One-Click Deployment Setup Screens.pdf>

(Feel free to use 'Best Practices' and 'Setup Screens' links with email instructions as desired.)

As a reminder be sure to ...

- ... Make sure device SNMP is enabled and configured as necessary;
- ... While on location, verify device reporting during software deployment;
- ... If needed, update device firmware when necessary.