# Cloud Onboarding: Upload Client (Service User) Data

Cloud Onboarding · https://cclearninghub.co.uk/docs/cloud-onboarding-upload-client-service-user-data/

## Cloud Onboarding: Upload Client (Service User) Data

- Home
- Care Control Knowledgebase
- Cloud Onboarding
- Cloud Onboarding: Upload Client (Service User) Data



Kieran Worth

Adding a new service user is the first step to setting them up in the system so they can be managed across care, compliance, and day-to-day workflows. This guide walks you through creating a service user record from the Admin app, selecting the correct service user type, and completing the essential personal details needed to get started.

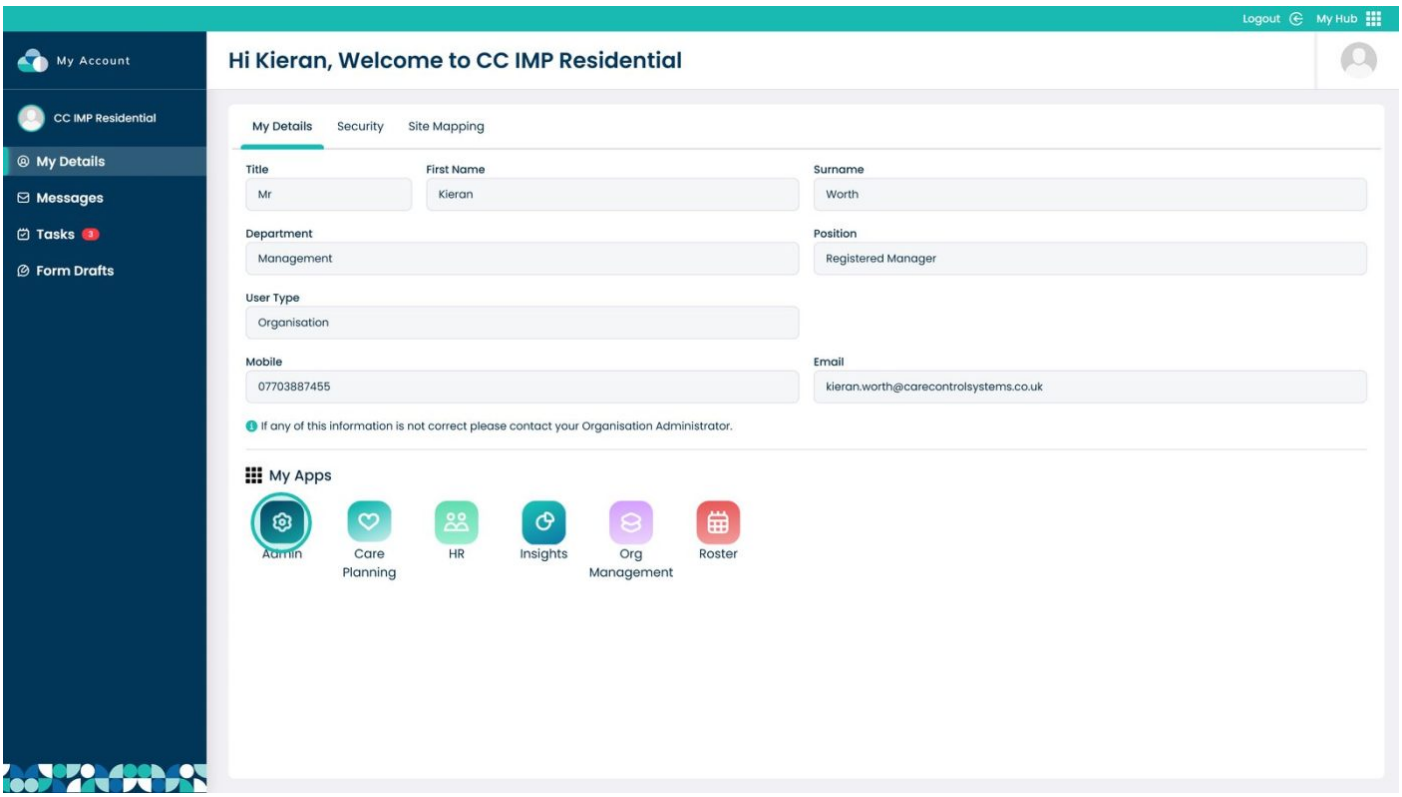
### Manual Upload

Embedded media:

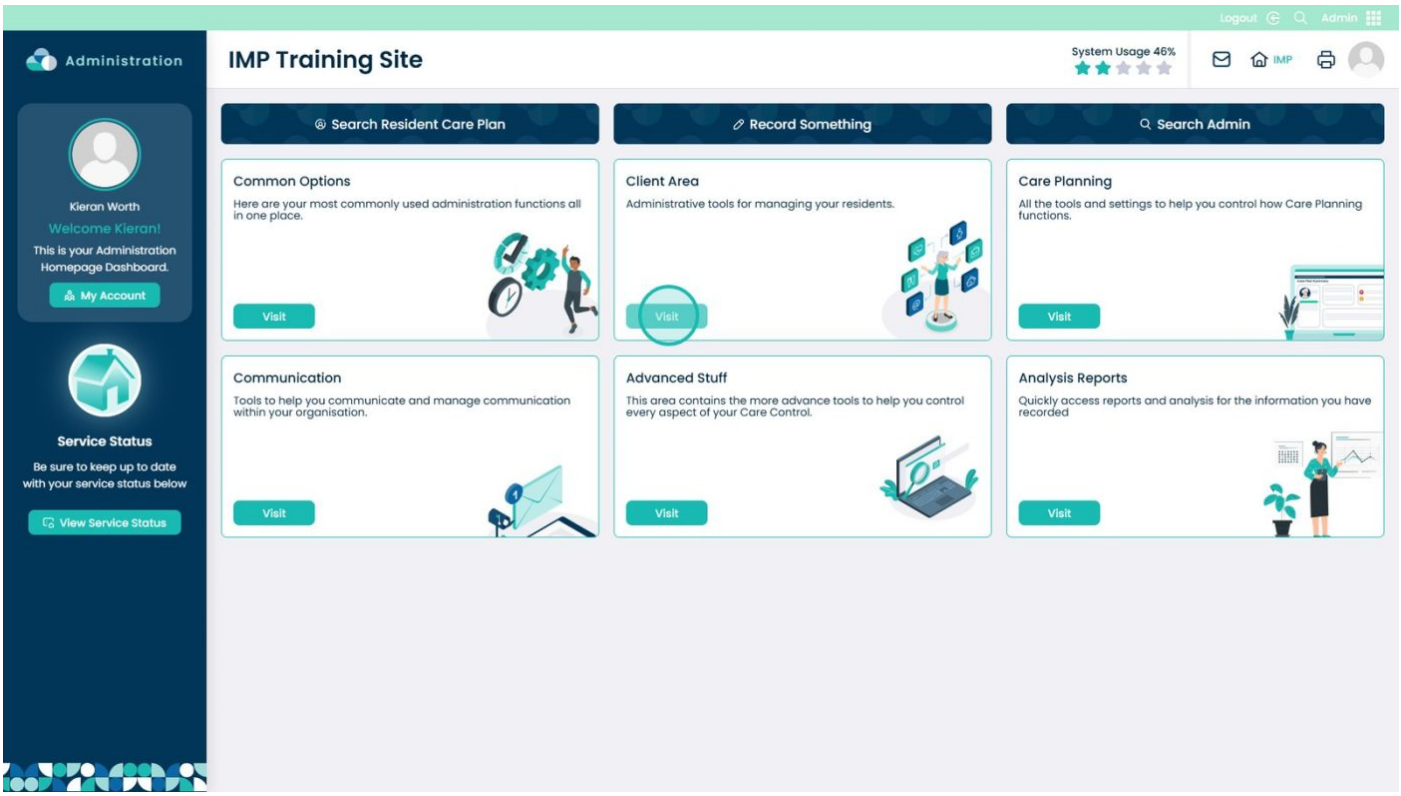
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## Text based guide

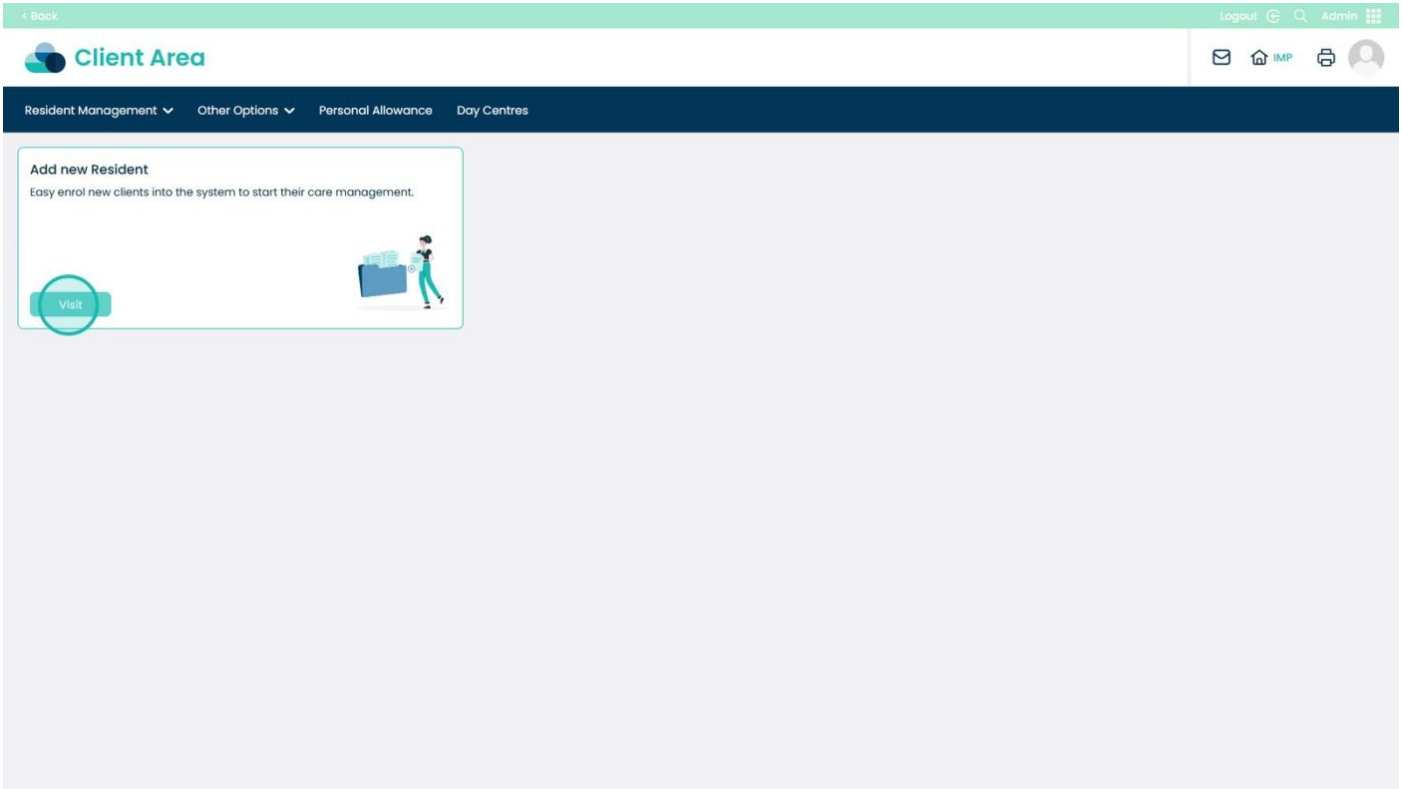
## Enter the Admin app



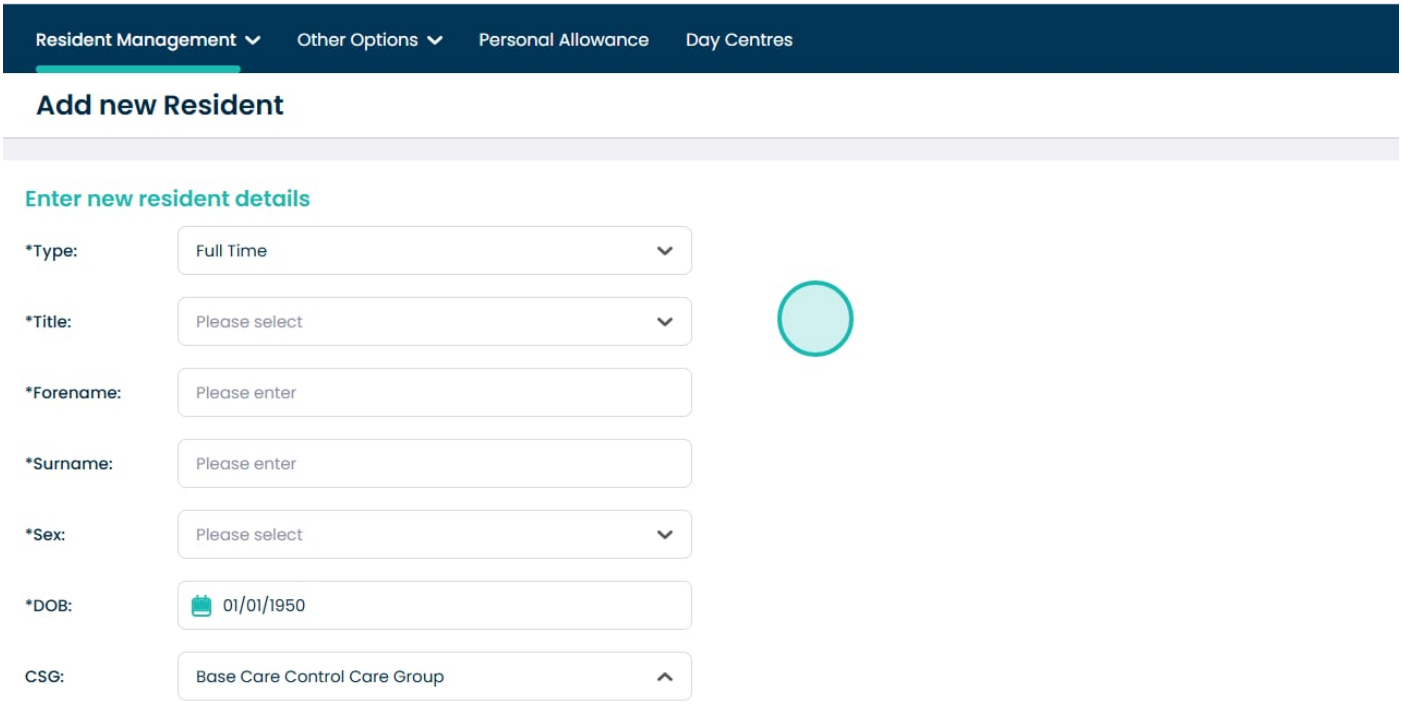
## Open the Client area



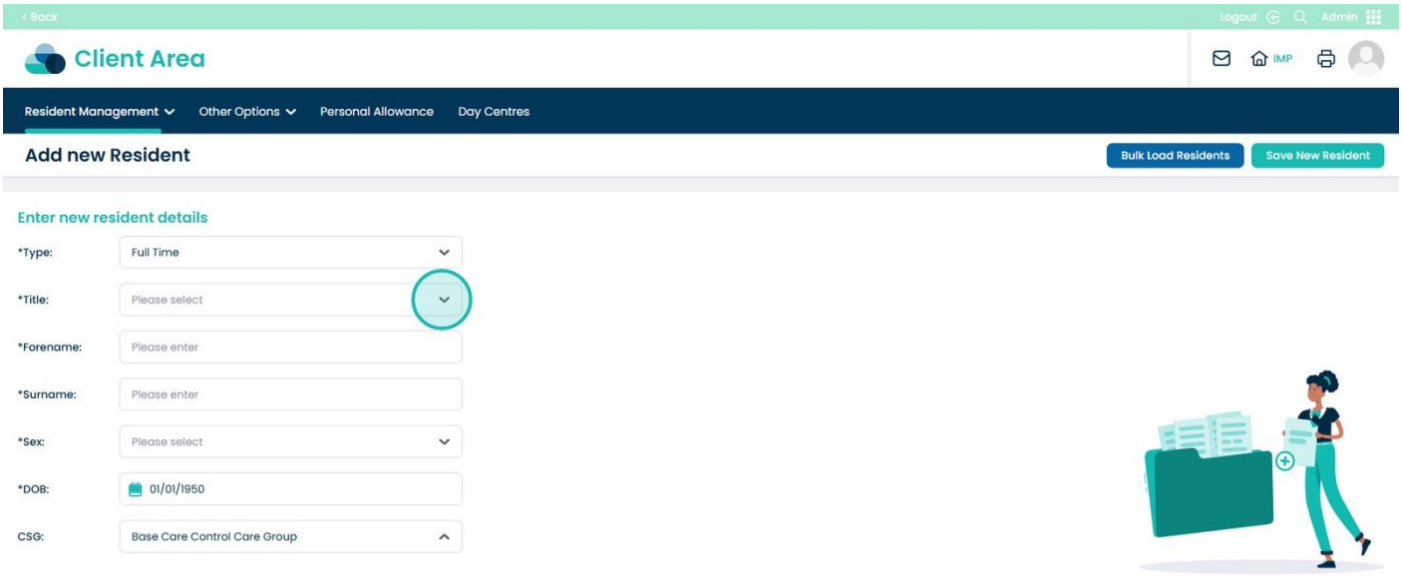

## Open Add New Service User



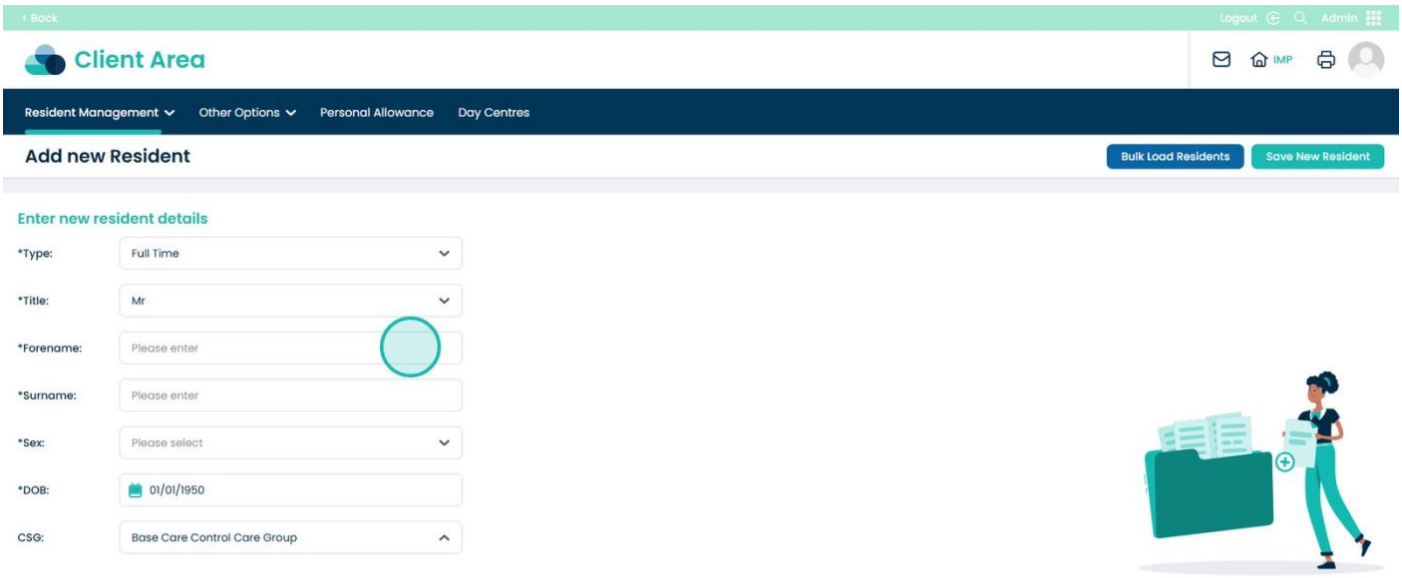
## Select the service user type



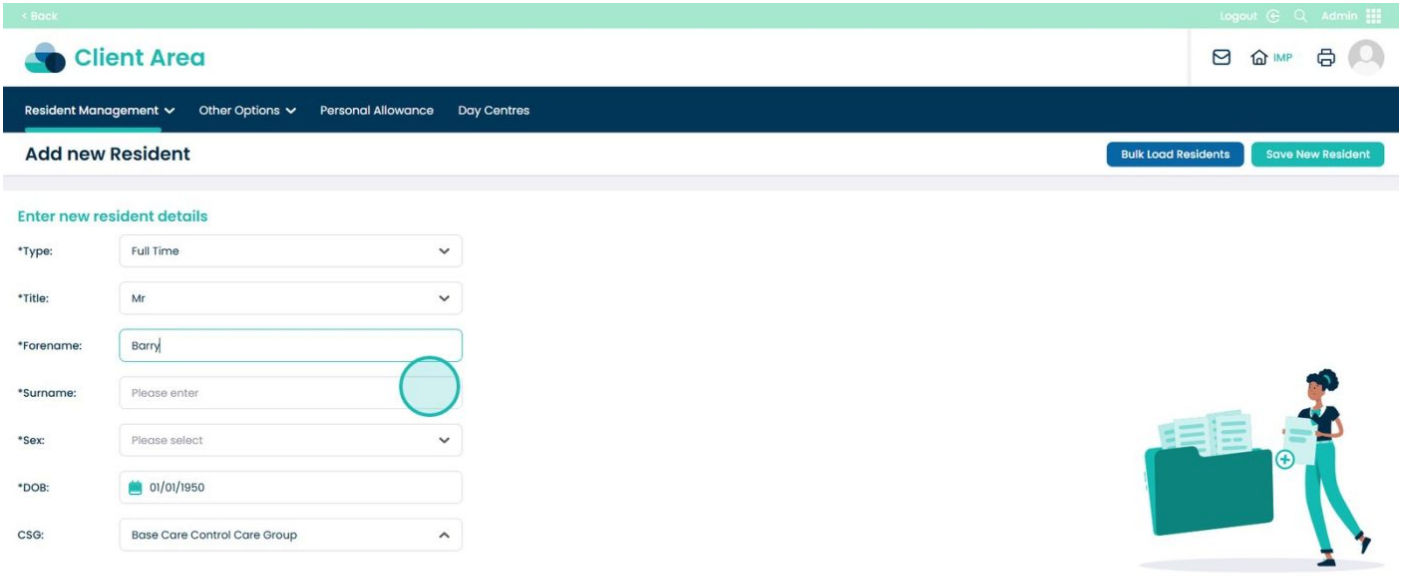

## Choose a title



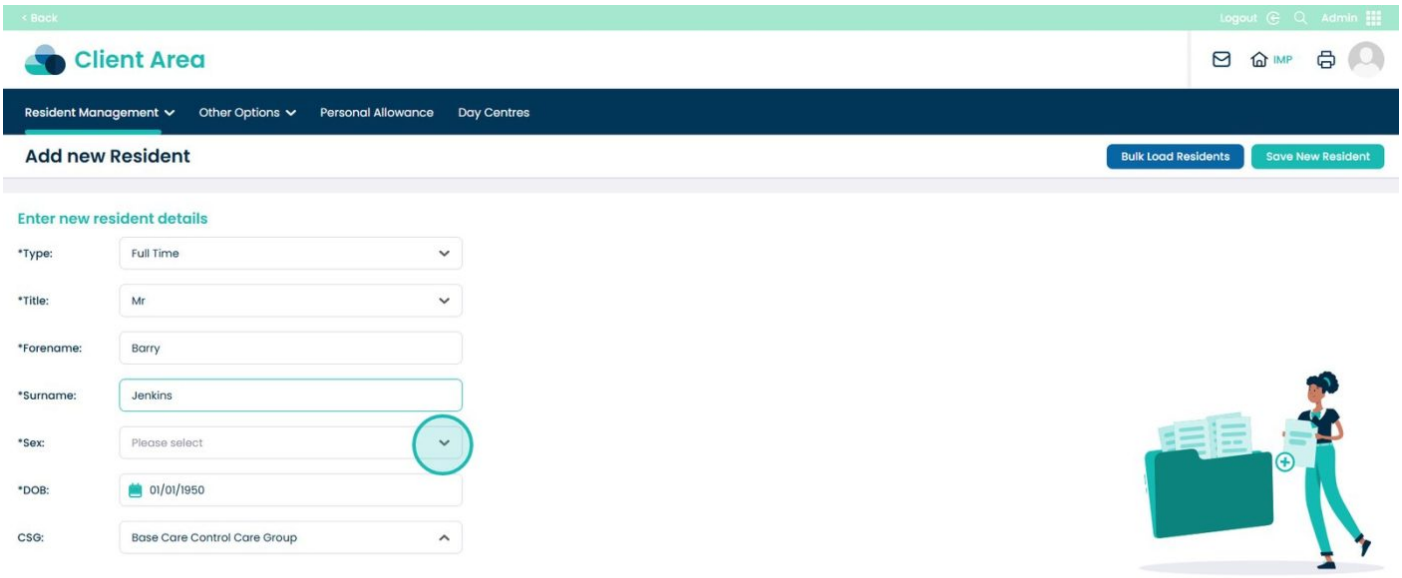
## Enter the forename



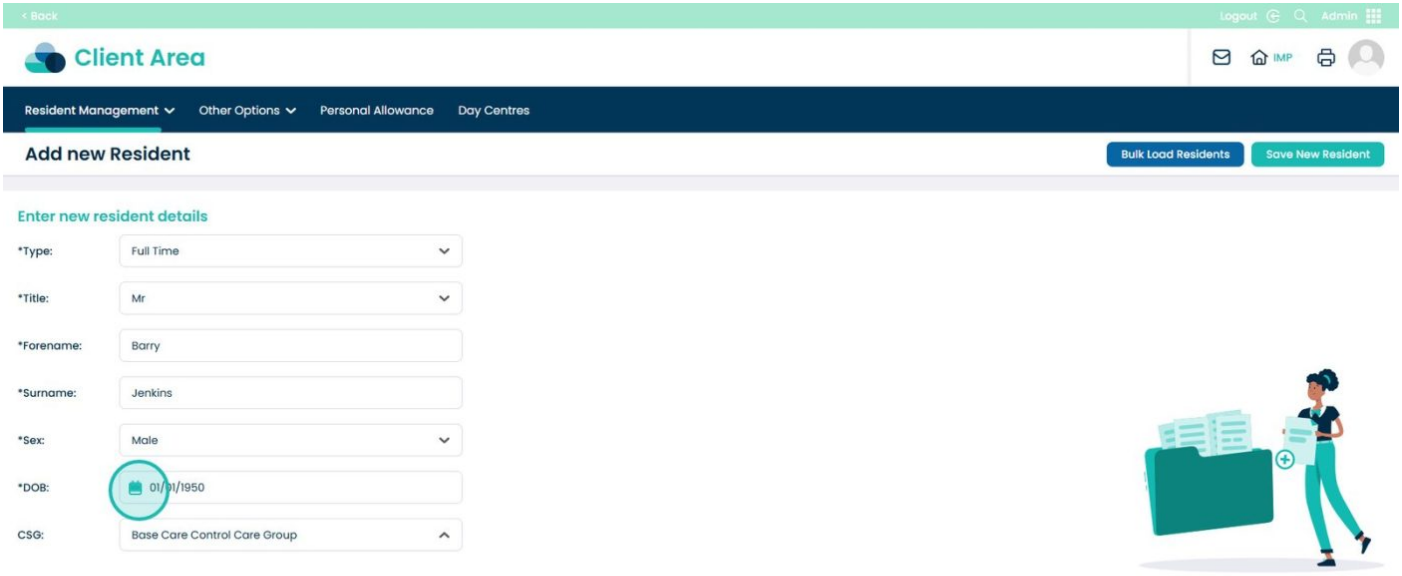

## Enter the surname



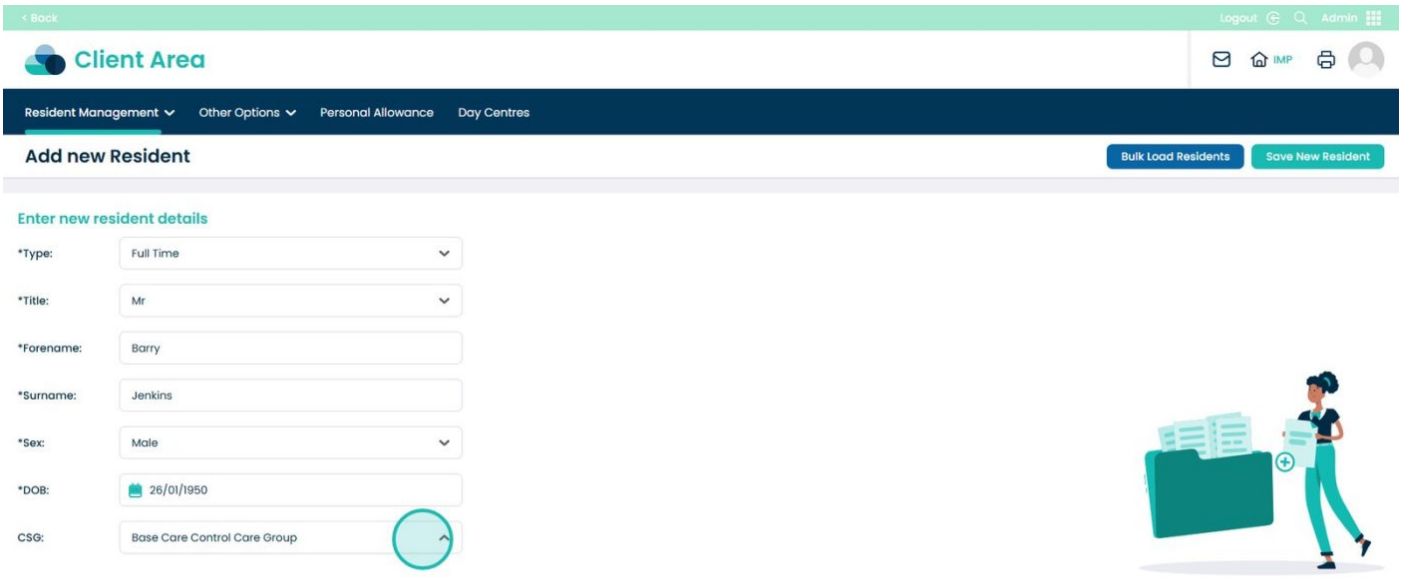
## Select clinical sex



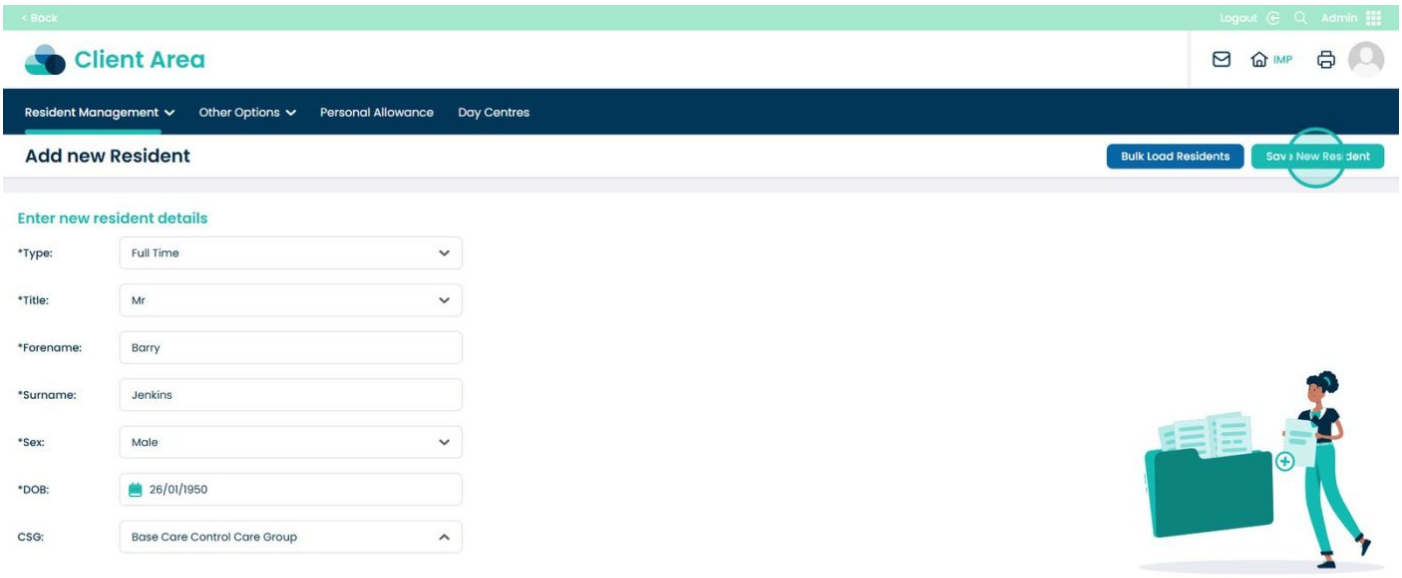

## Enter date of birth



## Select the CSG to assign




## Save the new service user



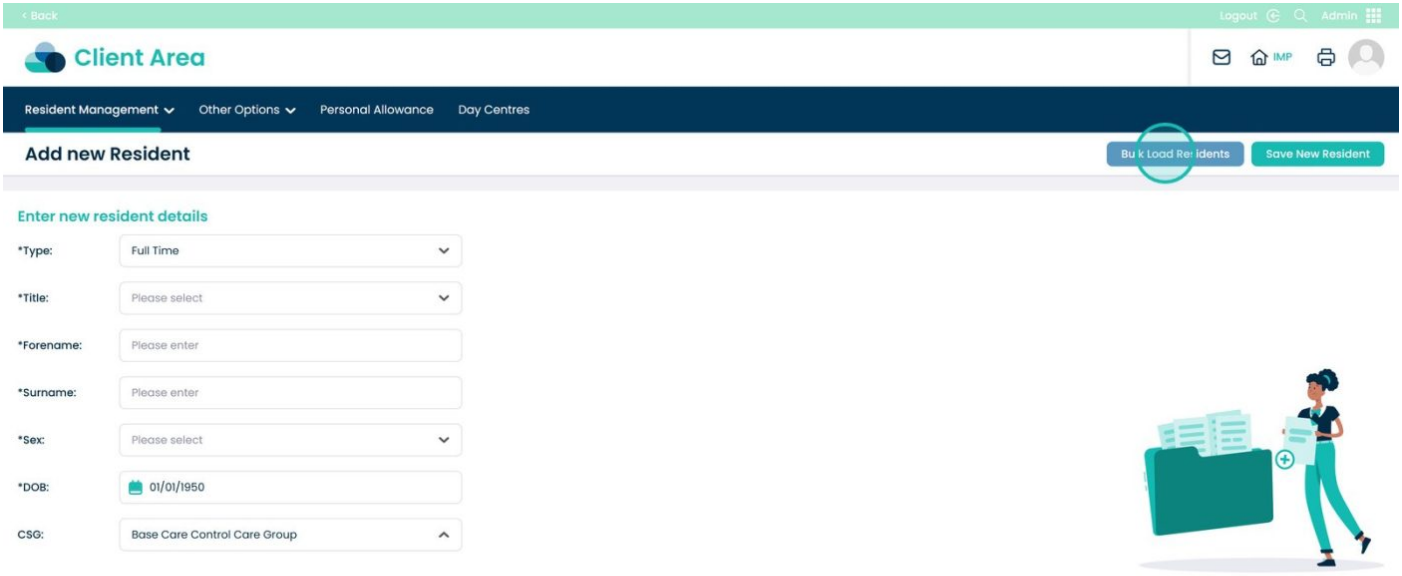

## Bulk Upload

Bulk uploading clients is the quickest way to add multiple client records to the system while keeping data consistent and accurate. This guide walks you through the full bulk upload process, from downloading the correct CSV template to reviewing and confirming your uploaded data.

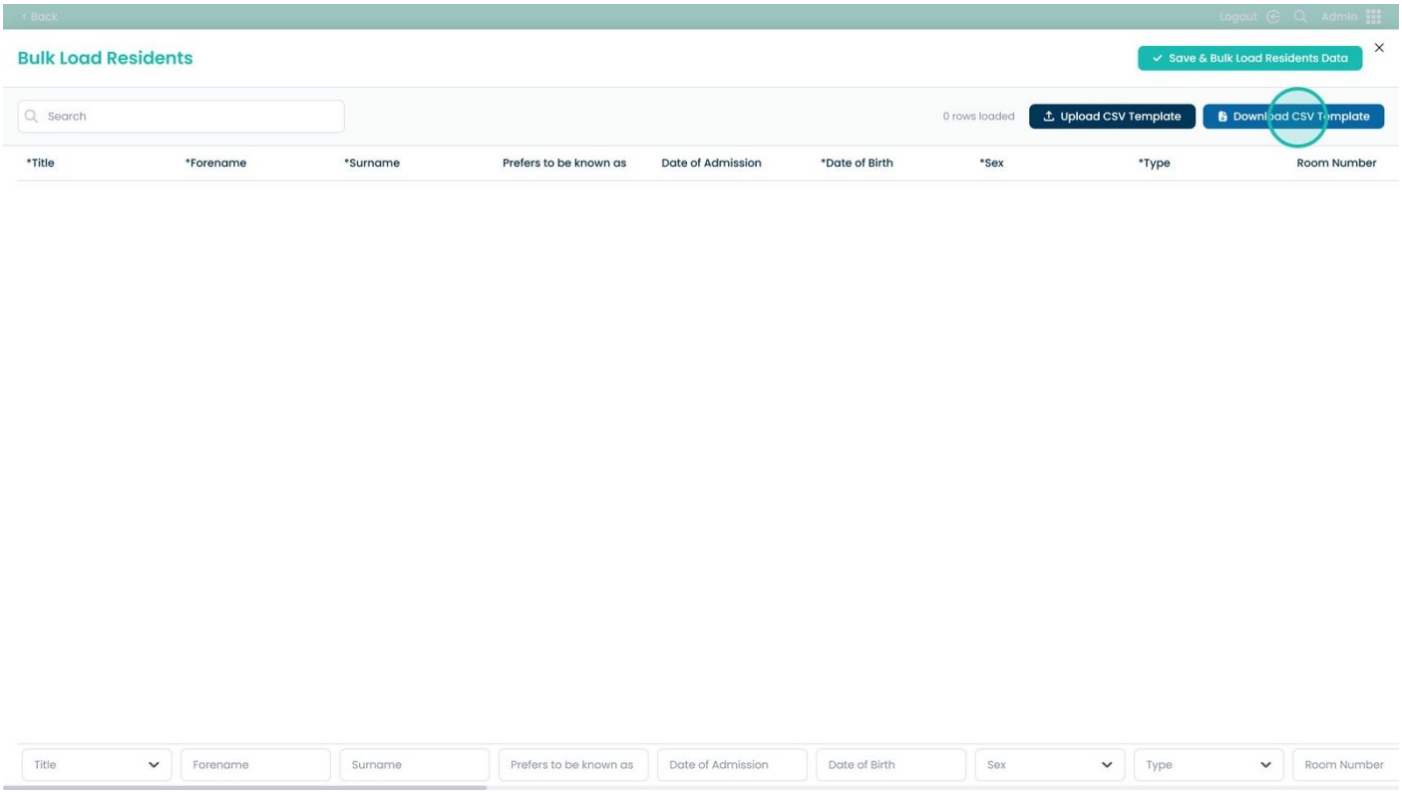
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https://demo.arcade.software/auusSVxFWUdFeANj8yQn?embed&embed_mobile=tab&embed_desktop=inline&show_copy_li

## Text based guide

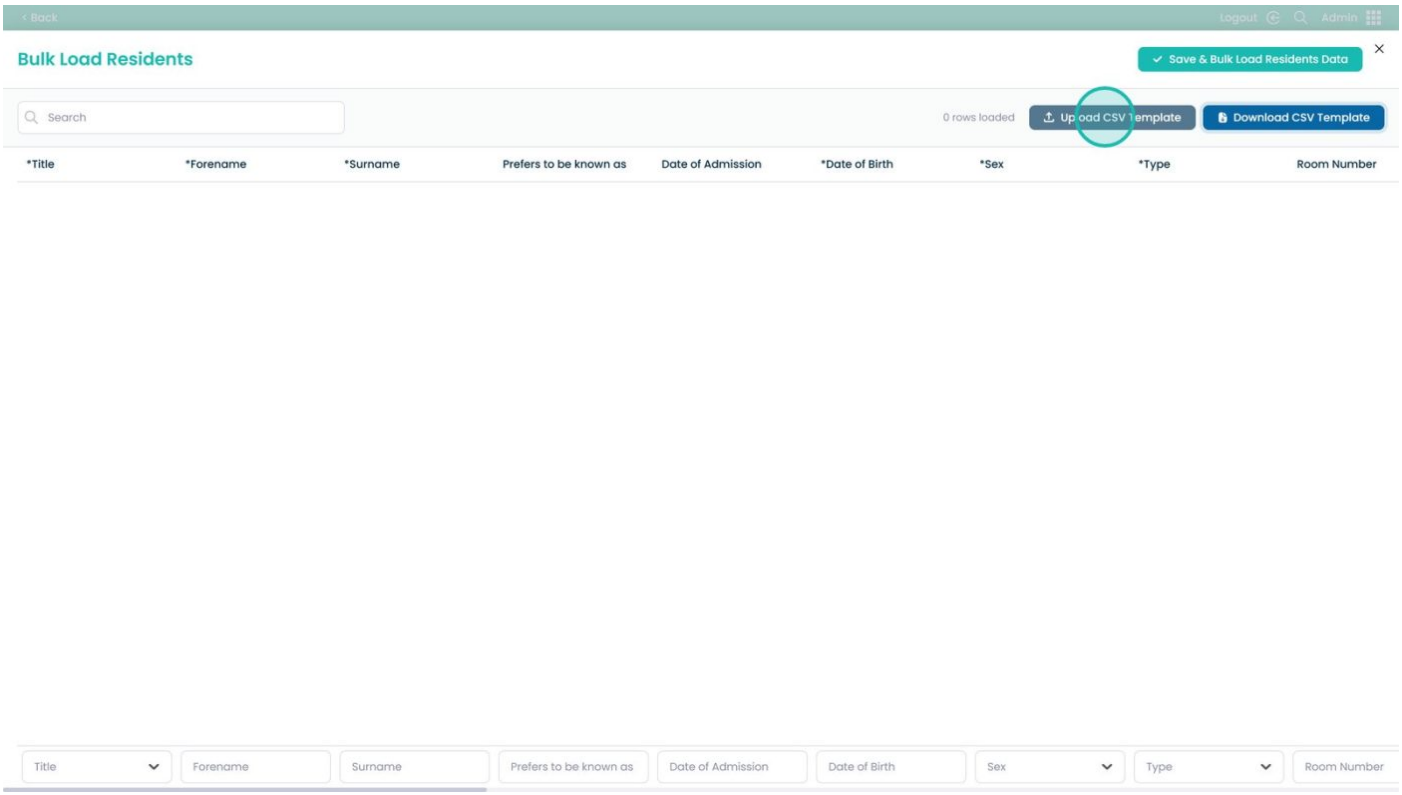
## Select Bulk Load Clients



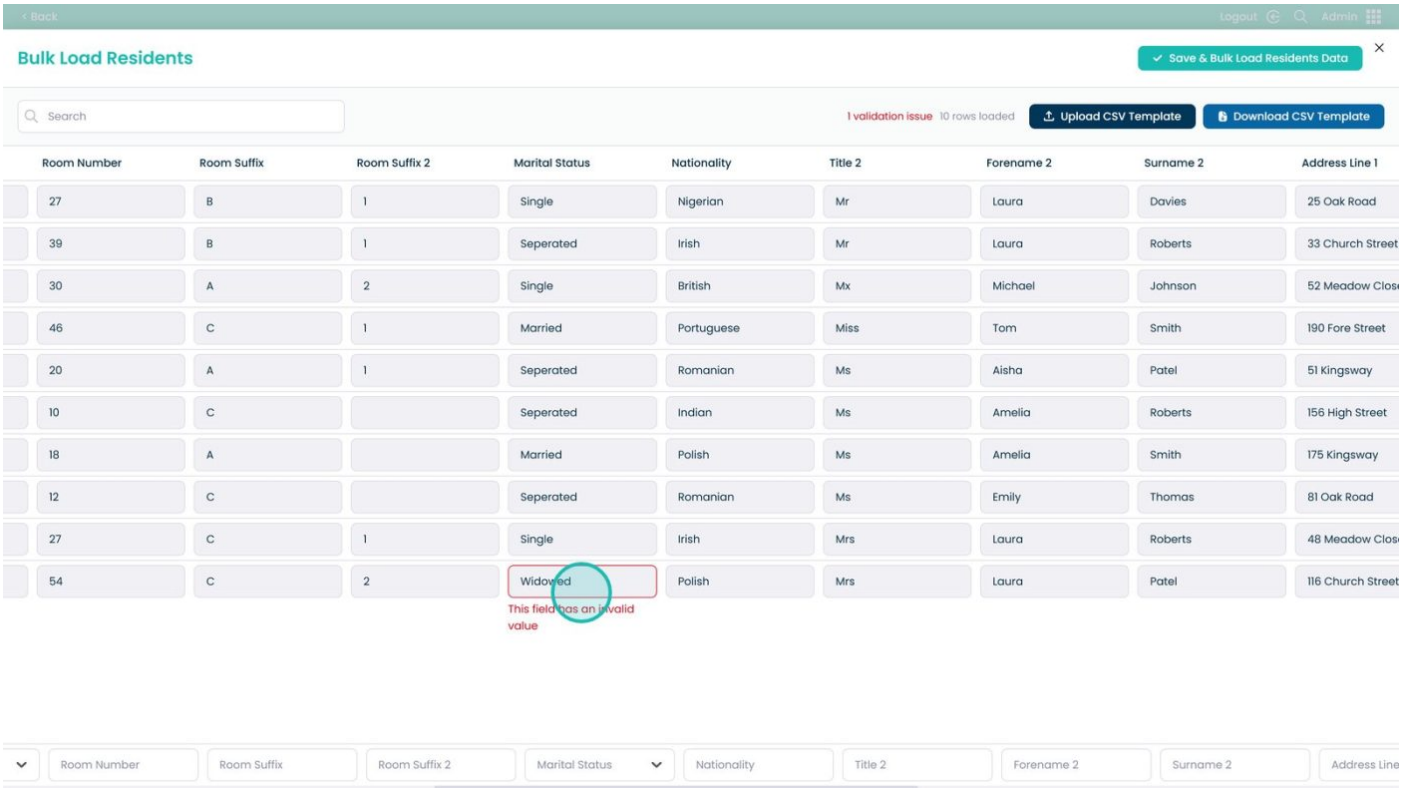

## Download the CSV template



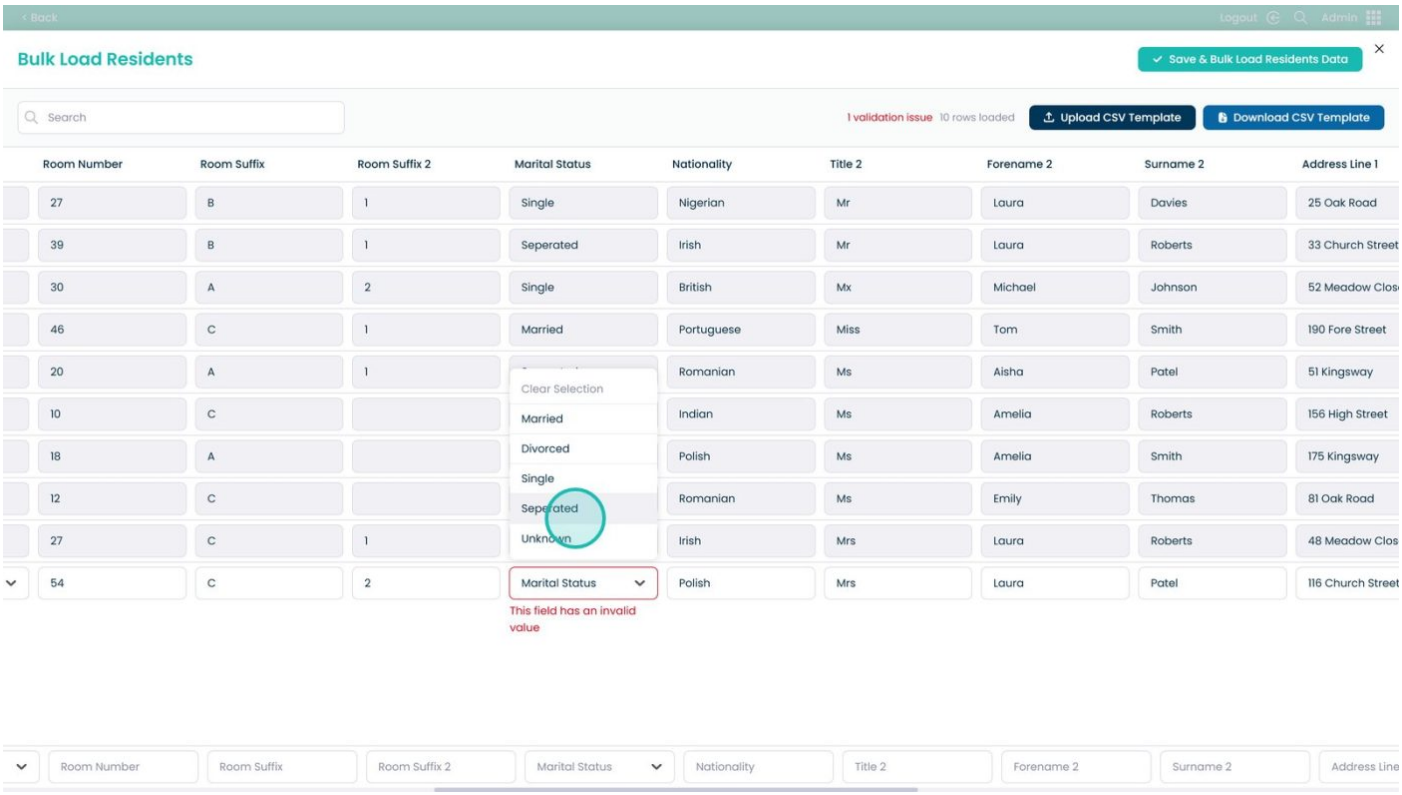
## Upload the completed CSV



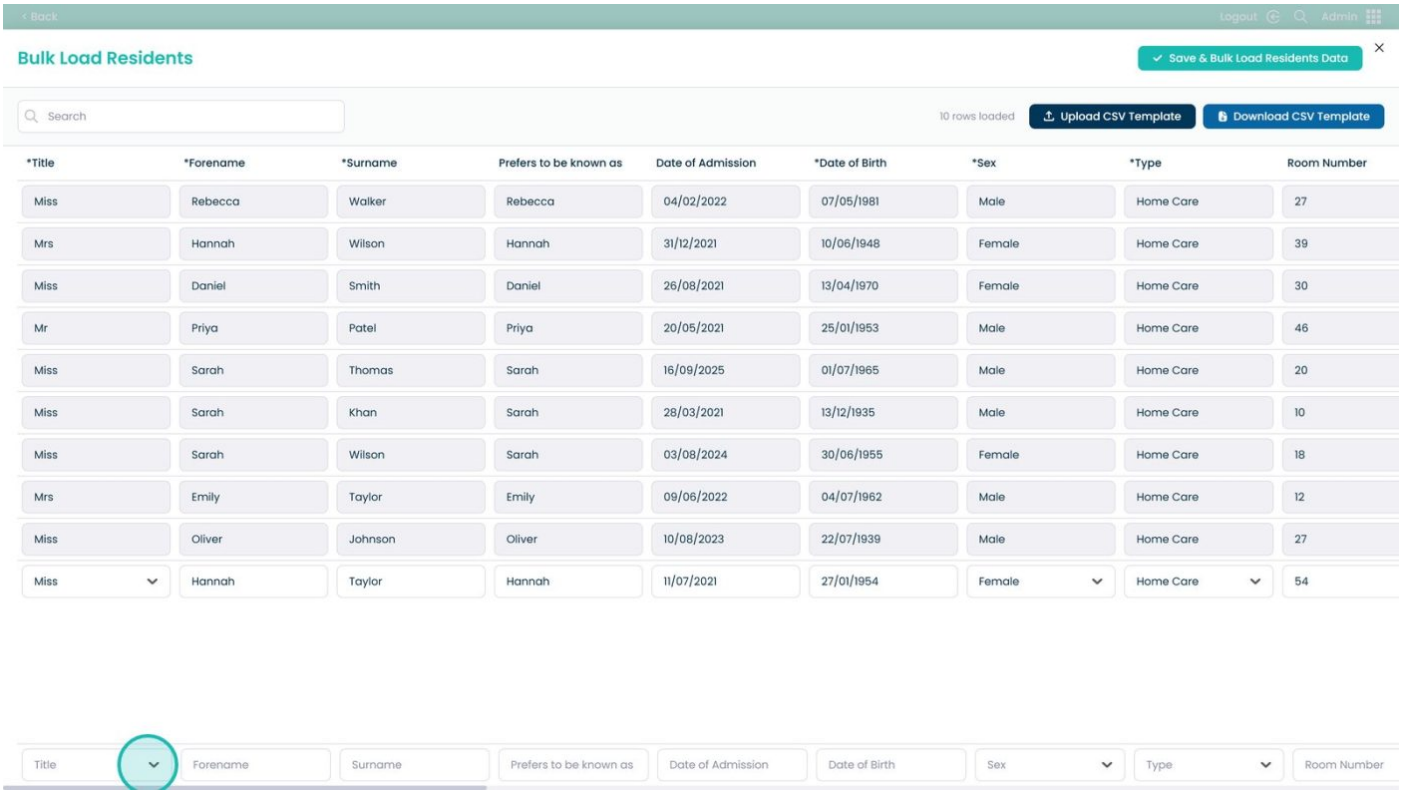

## Review and fix any highlighted errors



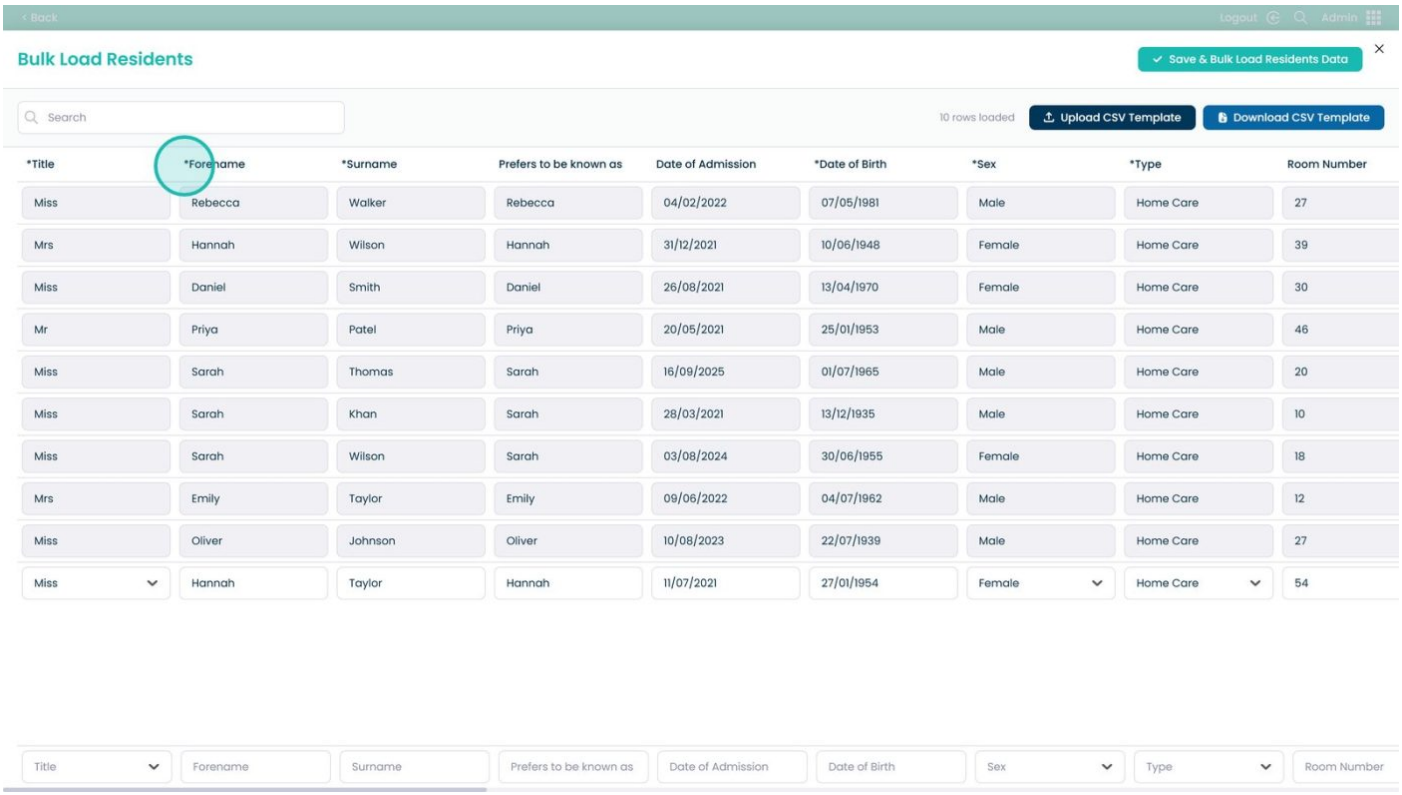
## Select the closest matching option where prompted



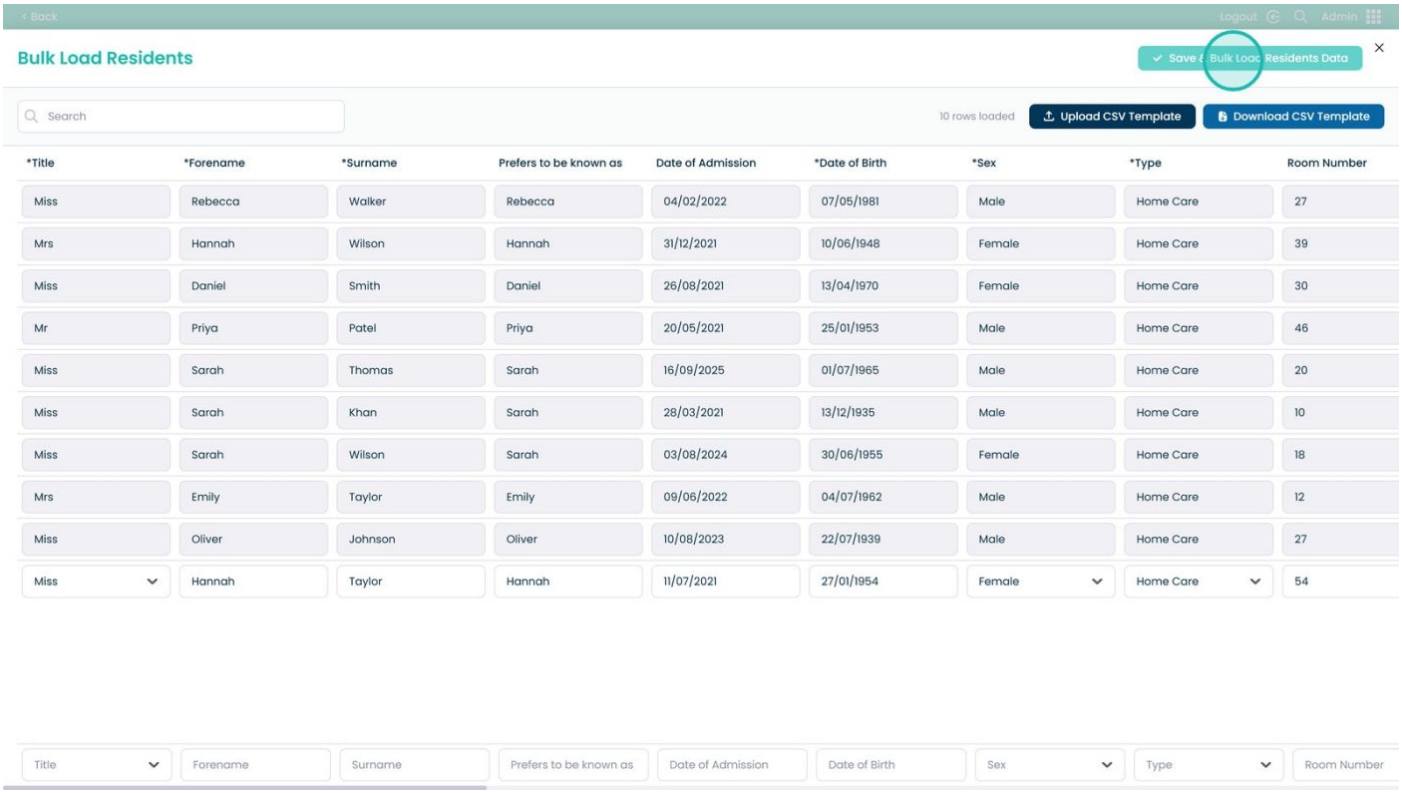

## Add additional clients manually if required



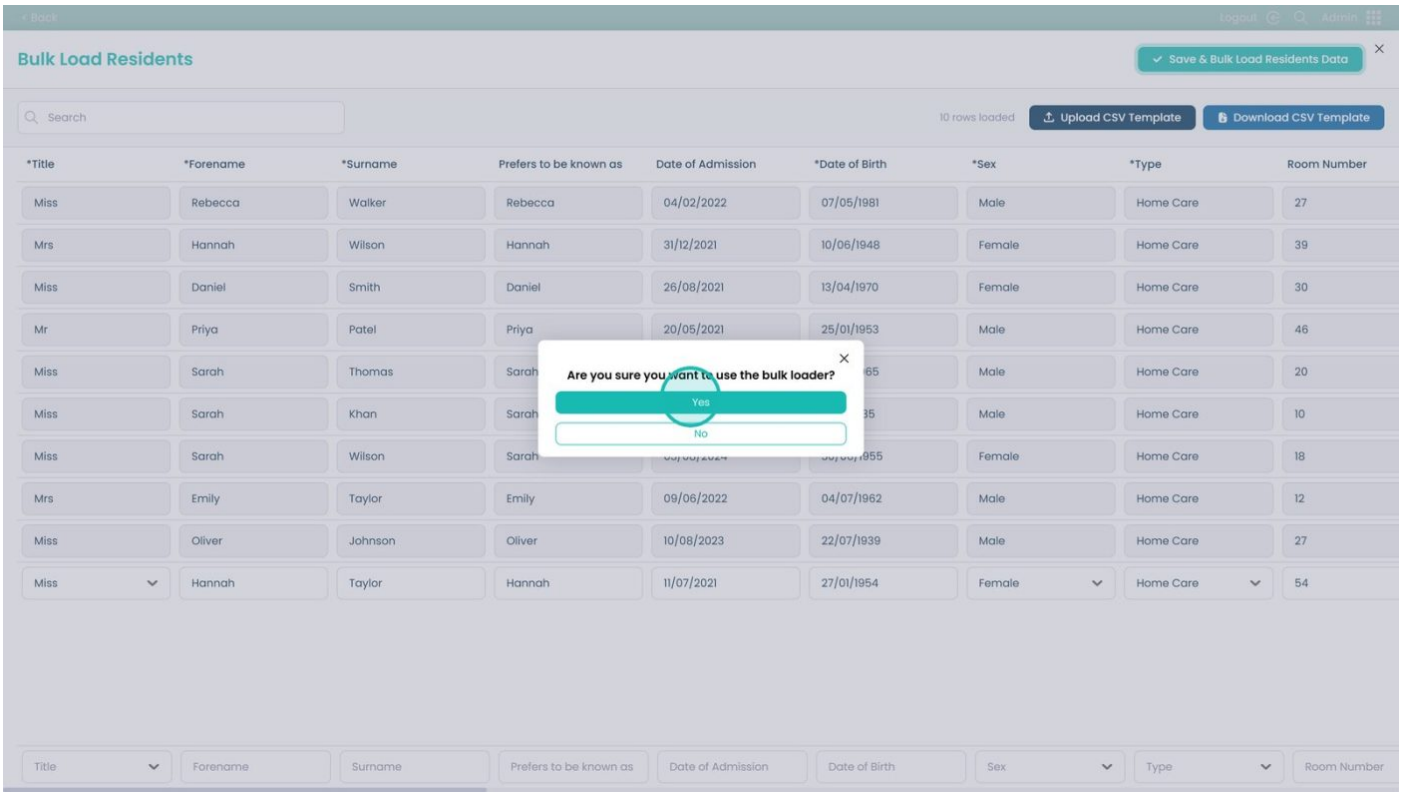
## Required fields are marked with an asterisk




## Save and start the bulk load



## Confirm to complete the upload




### Was it helpful ?

- Happy
- Normal
- Sad

### Table of Contents

↑ Top