

1 What is onboarding?

Very simply it is getting your data into the system as simply as possible.

2 What is your data?

This includes all the information you have on your:

- Customers
- Suppliers
- Parts
- Staff
- The work activities you do
- The rates you charge
- Credit and payment terms

3 What format does it need to be in?

Information on Customers, Suppliers, Parts and anything where you have lots of data is uploaded from an excel spreadsheet (or can be entered manually). Other types of information are entered directly into Repair Shop.

4 The order you add things is important

It is important to add the information to Repair Shop in a certain order, because some of the information you enter will be used when you add other things. For example, when you add a Customer you will need to choose Credit Terms for that Customer, so you need to enter your Credit Terms before you enter your Customers.

The order to add things directly to Repair Shop is:

1. User Accounts > Users
2. Job/Quote > New Engineers
3. Libraries > Work Activity Types
4. Libraries > Work Roles
5. Libraries > Work Rates
6. Customers > Credit Terms
7. Suppliers > Payment Terms
8. Parts > Part Groups

Once these are added you can upload the following information from our Excel Spreadsheet:

9. Customers
10. Customer Locations
11. Customer Contacts
12. Customer Assets
13. Suppliers
14. Parts