

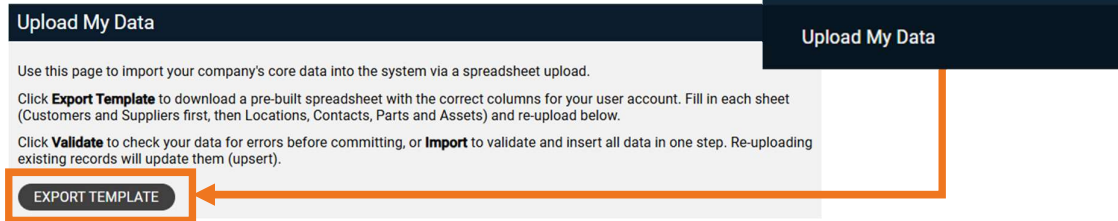
1 What Customer Location information is uploaded?

The system needs addresses etc for all the sites, branches and workshops of your Customers:

Info. Needed	Description	Required?
Code	Set a code for the Location to help you identify it	Yes
Name	A full name for the Customer's location	Yes
Address 1	Address 1	Optional
Address 2	Address 2	Optional
Address 3	Address 3	Optional
Address 4	Address 4	Optional
City	Full name of City	Yes
ZIP	ZIP code	Yes
Country	Full name of Country (not initials)	Yes
State	Full name of State (not initials)	Yes
Primary Contact No.	This is the main phone number for this particular location	Optional
Other Contact No.	This is an alternate phone number for this particular location	Optional
Primary Email	This is the main email for this particular location	Optional
Other Email	This is an alternate email for this particular location	Optional
What3Words	This is for the 3 words that define the location (as per What3Words App)	Optional
Customer	Full name of Customer as entered into Repair Shop	Yes

2 How do you create the upload spreadsheet?

- Go to the 'Tools' menu and choose 'Upload my Data'



Use this page to import your company's core data into the system via a spreadsheet upload.

Click **Export Template** to download a pre-built spreadsheet with the correct columns for your user account. Fill in each sheet (Customers and Suppliers first, then Locations, Contacts, Parts and Assets) and re-upload below.

Click **Validate** to check your data for errors before committing, or **Import** to validate and insert all data in one step. Re-uploading existing records will update them (upsert).

EXPORT TEMPLATE

- 'Export Template' and save the file somewhere you know to open it from (or use one you already have downloaded and saved)
- Enter the Customer Location information onto the 'Locations' tab and save the spreadsheet
- 'Validate' the spreadsheet
- 'Import' the spreadsheet

Select Spreadsheet:

Choose file OnboardingT...te Test2.xlsx

Accepted format: .xlsx

VALIDATE **IMPORT**

Select Spreadsheet:

Choose file OnboardingT...te Test2.xlsx

Accepted format: .xlsx

VALIDATE **IMPORT**

If there are any problems with the information the system will tell you what it is and where it is. Update the spreadsheet with the corrected values and try again.