

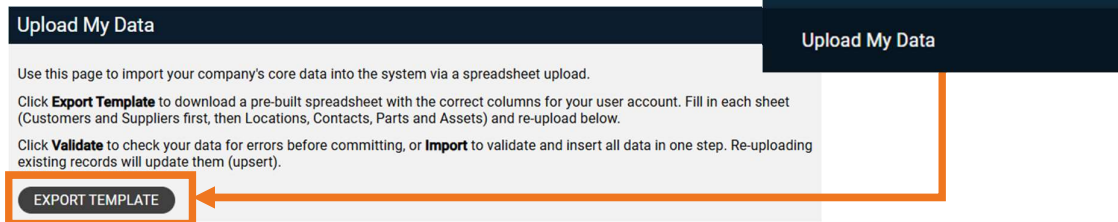
1 What Customer Contact information is uploaded?

This is the information about the people that work for your Customers. This list is:

Info. Needed	Description	Required?
Customer	Full name of Customer as entered into Repair Shop	Yes
First Name	First name of the Contact	Yes
Last Name	Last name of the Contact	Yes
Known As	What the Contact is usually known as (e.g. Brad or Mrs Smith)	Optional
Email Address	Email Address for the Contact	Optional
Contact No 1	Main phone number for the Contact	Optional
Contact No 2	Alternate phone number for the Contact	Optional

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 Contact information onto the 'Contacts' 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.