

1 What Customer Asset information is uploaded?

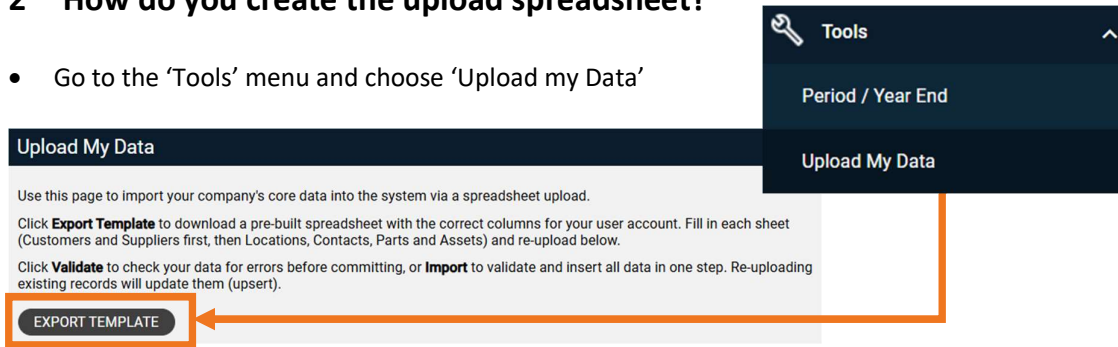
This is a list of Asset Identification information for Customers' Assets. This list is:

Info. Needed	Description	Required?
Name	The identification for the Asset. This could be make and serial number or Customer tag number – something that identifies it now and in the future	Yes
Customer	The full name of the Customer as already entered in Repair Shop	Yes
Property 1	Choose Property 1 saved against Assets – Manufacturer	Optional
Property 2	Choose Property 1 saved against Assets – Frame	Optional
Property 3	Choose Property 1 saved against Assets – Star/Delta	Optional

- There must be at least one Asset for every Customer
- If you do not have specific Assets you can add one item with the Name 'General Assets'
- More Assets can be added as they come in to be worked on

2 How do you create the upload spreadsheet?

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



Tools

- Period / Year End
- Upload My Data

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 Asset information onto the 'Assets' 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.