

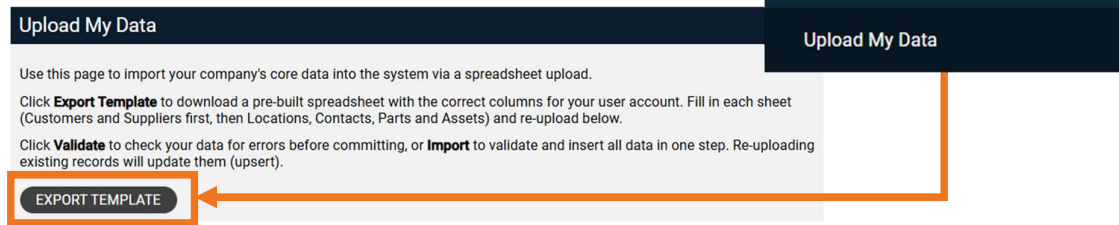
1 What Supplier information is uploaded?

The system needs as much basic information on your Suppliers as you have. This is the list:

Info. Needed	Description	Required?
Code	This is a short code you set for your Supplier. For example, ACM001	Yes
Name	This is the full, legal name of your Supplier's company.	Yes
Remittance Email	This is the Supplier email to which you send remittances	Optional
Payment Terms	These are the Payment Terms that your Supplier has given to you. These must be entered into Repair Shop first.	Optional
Bank Account Name	Not used in this version of Repair Shop	Not used
Bank Account No	Not used in this version of Repair Shop	Not used
Bank Account Sort	Not used in this version of Repair Shop	Not used
Phone 1	The main telephone number for your Supplier	Optional
Phone 2	A second telephone number for your Supplier – if there is one	Optional
Email	Main email for your Supplier	Optional
Address 1	Address 1	Optional
Address 2	Address 2	Optional
City	Full name of City	Optional
ZIP	ZIP	Optional
Country	Full name of Country (not initials)	Optional
State	Full name of State (not initials)	Optional

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

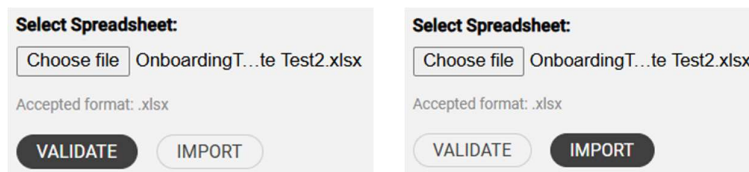
Use this page to import your company's core data into the system via a spreadsheet upload.

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 above Supplier information onto the 'Supplier' tab and save the spreadsheet
- 'Validate' the spreadsheet
- 'Import' the spreadsheet



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.