

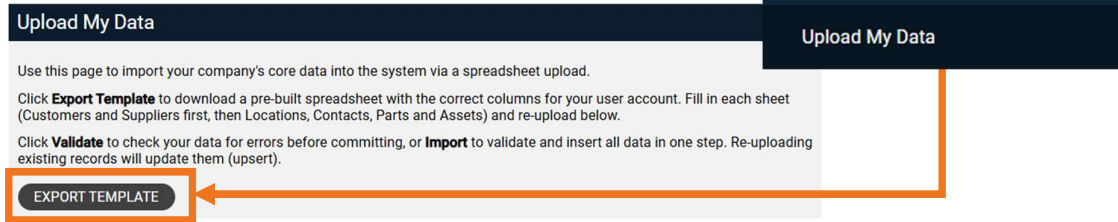
1 What Part information is uploaded?

This will start to create your Part Catalogue, containing all the Parts you buy, use and sell. They will then be available to order, issue to Jobs and sell.

Info. Needed	Description	Required?
Part Number	This is a unique identification for the Part. You can use the Supplier Part number if you wish or make one up yourself.	Yes
Description	This is a fuller description of the Part so that people fully understand what it is	Yes
Group	The Part Group that the Part belongs to (must already be in Repair Shop)	Yes
Mark-up	This is the mark-up on the Part that will create the suggested Price from the Cost. For example, cost = 100, mark-up = 35% suggested Price	Yes
Preferred Supplier	Suppliers must have been added to Repair Shop before adding for a Part	Optional
Cost	The cost of the Part. It should be what you paid for it last or can be an estimate or supplier quote if you don't have that figure	Yes
Minimum Stock Level	This is the minimum number of the Part you want to hold in stock. If you enter a number here Repair Shop will prompt you to buy when stock drops below it	Optional
Maximum Stock Level	This is the maximum number you want to hold in Stock. If your stock drops below your Minimum Stock Level then you will be prompted to buy enough Parts to get back up to your Maximum Stock Level.	Optional
Tax Category	Choose from: Physical Goods, Services, Manufacturing & Raw Materials, Medical, Digital Products, SaaS/Software, Food & Drink, Clothing	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 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 Part information onto the 'Parts' 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.