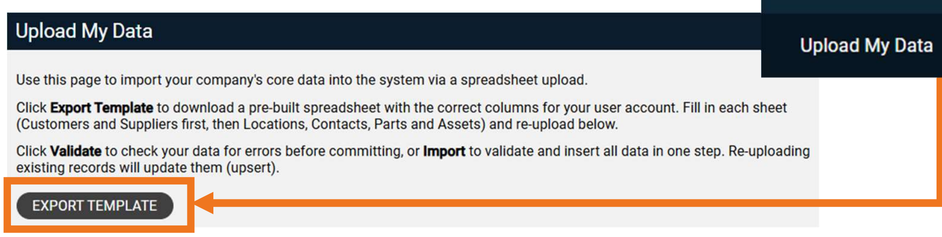
1 What Customer information is uploaded?

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

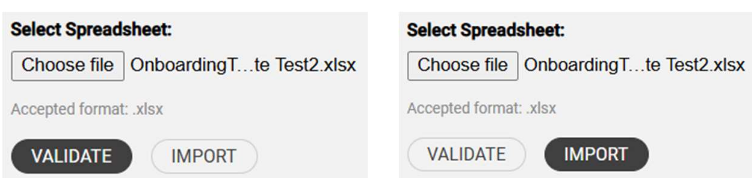
Info. Needed	Description	Required?
Code	This is a short code you set for your Customer. For example, ACME01	Yes
Name	This is the full, legal name of your Customer's company.	Yes
Invoice Email	This is the Customer email to which you send sales invoices	Optional
Statement Email	This is the Customer email to which you send statements	Optional
Credit Terms	These are the Credit Terms that you have given to your Customer. These must be entered into Repair Shop first.	Optional
Credit Limit	This is the maximum credit you give to the Customer	Optional
Default Validity	This is the usual Quote Validity that you offer to this Customer. This must be from: 7 Days, 14 Days, 30 Days, 60 Days, 90 Days.	Optional
Default Lead	This is the usual Quote Validity that you offer to this Customer. Must be from: Same Day, 1-2 Days, 3-5 Days, 1 week, 2 weeks, 1 month, To be confirmed	Optional
Primary Contact Name	The name of the main contact for your Customer	Optional
Primary Phone	The main telephone number for your Customer	Optional
Secondary Contact Name	The second contact for your Customer – if there is one	Optional
Secondary Phone	A second telephone number for your Customer – if there is one	Optional

2 How do you create the upload spreadsheet?

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



- '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 Customer information onto the 'Customer' tab and save the spreadsheet
- 'Validate' the spreadsheet
- 'Import' the spreadsheet



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.