Bringing your services, parts and team from a spreadsheet

Bring the lists you already keep into HQ, or change what is here in Excel and bring it back.

Steps

1. Open Configure, then Import / update lists.
2. Pick the list: services, parts or technicians. Choose an Excel or CSV file, or paste the rows straight from Excel or Google Sheets.
3. Press Import / update lists and look at what would be added or changed. Nothing changes until you say so.
4. Press Confirm. Changed your mind? Press Take it back.

Good to know

To change many prices at once, press Download as Excel, change the file, and bring it back in. What is already here is updated.

Customers have their own place: Customers, then Add customers.