



WorkshopEase

Smart. Simple. Powerful.

New Customer Starter Guide

A practical guide to setting up your workshop, adding customers and vehicles, invoicing, online booking, reminders and reporting.

SETUP & PREFERENCES	CUSTOMERS	VEHICLES	JOBS
INVOICING	ONLINE BOOKING	REMINDERS	ANALYSIS & REPORTS

Need help?

Our team is here to help you get started with WorkshopEase.

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0. Set Up WorkshopEase Before You Start

Start in "User and Pages"

Complete the main business settings before entering live workshop data.

Company profile

Open the **Company** tab and make sure your company name, address, postcode, telephone, email and other workshop details are correct. Complete any missing profile information and add the correct workshop logo.

Preferences

Go through the **Preferences** tab and review the available options for your workshop, including settings that affect the system, documents and customer communications.

Bank Account

Open **Bank Account** and add the business bank account - or another account you use to receive customer payments. When needed, you can select the relevant invoice option so the saved payment details appear on the invoice.

Before continuing

- ✓ Company profile is complete and accurate.
- ✓ Preferences have been reviewed.
- ✓ A suitable bank/payment account has been added if you want payment details available on invoices.

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1. Start With Your Customers

Create accurate customer records first

For most new WorkshopEase customers, the best place to begin is the **Customers** menu. Customer information is then available throughout vehicles, workshop jobs, invoices, reminders and future visits.

Email or mobile is essential

When creating a customer, **at least one of email address or mobile number is required**. Accurate contact information is important for invoices, online booking communication and reminders.

Postcode Lookup

Use the built-in **Postcode Lookup** when entering an address. Search by postcode, choose the correct address and check the populated information before saving.

Search & Filter

The **Customer List** provides search and filter controls in the header row so you can quickly find or narrow down customer records. When a new customer is created, WorkshopEase automatically checks whether that customer is already registered.

Complete useful details

Where available, complete the customer's name, company, address, preferred contact information and other useful profile fields so the workshop has a reliable record.

2. Add Vehicles From the Customer Record

One customer can have multiple vehicles

From the **Customer List**, open the customer's record and add their vehicle. A customer is not limited to one vehicle - **multiple cars or vehicles can be linked to the same person.**

Multiple vehicles

For example, a customer's family car, van and second car can all be stored against the same customer record. This keeps the customer's vehicles and workshop history organised together.

Keep the link correct

Always confirm that each vehicle is attached to the correct customer. This becomes important when creating jobs, invoices and reviewing service history.

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3. Add Vehicles From the Vehicles Menu

You can also start from Vehicles

A vehicle does not have to be created from inside a customer record. You can open the **Vehicles** menu and add the vehicle directly.

Link an existing customer

If the customer has already been added to WorkshopEase, select and link that existing customer while creating the vehicle.

Registration Lookup - DVLA

Use **Registration Lookup** to make vehicle entry faster. Enter the vehicle registration and retrieve available vehicle information through the DVLA-connected lookup service. Review the returned details before saving.

Vehicle Search & Filter

The **Vehicle List** also has search and filter controls in the header row, helping you quickly find vehicles and narrow the list.

Mileage & workshop details

Confirm the returned vehicle information and add workshop-specific information such as current mileage where required.

4. Recommended First Customer Workflow

A simple order to follow

1. Customer

Create the customer and enter at least an email address or mobile number. WorkshopEase automatically checks whether the customer is already registered.

2. Address

Use Postcode Lookup where appropriate and confirm the selected address.

3. Vehicle

Add the vehicle from the customer record, or create it from the Vehicles menu and link the existing customer.

4. Registration Lookup

Use the DVLA-connected Registration Lookup to populate available vehicle information and verify the result.

5. Mileage & details

Enter or confirm mileage and any other relevant vehicle information.

6. Job

Create a workshop job when the vehicle is being booked in for work.

5. Invoicing

Flexible invoicing - with or without a workshop job

Invoice from a job

When appropriate, create the invoice from an existing workshop job so the customer, vehicle and job information can be carried into the invoicing workflow.

Independent invoice

An invoice **does not have to be created from a job**. You can issue an invoice independently whenever required.

Existing or non-registered customer

An independent invoice can be issued to an **existing WorkshopEase customer** or to a **person/business that is not registered as a customer** in the system.

Before sending

Review the Bill To information, vehicle details where relevant, item descriptions, quantities, prices, tax, discounts and totals. If required, select the relevant option to include your saved bank/payment details.

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6. Online Booking, Reminders & Analysis

Make the most of WorkshopEase

Online Booking

Customers can submit booking requests online. Promote your workshop booking page on your website, social media and printed customer material so customers can request appointments without needing to telephone.

Reminders

Accurate customer mobile/email information and vehicle records help support service and MOT reminder workflows.

Analysis & Reports

Use dashboards and reports to review workshop performance, including **sales and finance**, invoice activity, collected amounts and outstanding amounts.

7. New Starter Quick Checklist

Ready to start using WorkshopEase?

- ✓ Open User and Pages and complete Company details.
- ✓ Review Preferences.
- ✓ Add the business bank/payment account used to receive payments.
- ✓ Create the first customer with at least an email or mobile number.
- ✓ Use Postcode Lookup for the address.
- ✓ Use Customer List search and filters when needed.
- ✓ Add one or more vehicles to the customer.
- ✓ Alternatively, add a vehicle from Vehicles and link an existing customer.
- ✓ Use Registration Lookup for available DVLA vehicle details.
- ✓ Use Vehicle List search and filters when needed.
- ✓ Confirm vehicle mileage and details.
- ✓ Create jobs when required.
- ✓ Remember that invoices can also be issued independently, including to non-registered customers.
- ✓ Review Online Booking, Reminders and Analysis & Reports.

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