

Switch to Driveline: what to keep ready

Tick each item as you collect it. Send whatever you have. We do the typing.

Workshop

Cut-off date

- ☐ **1. Customer list export**
Excel or CSV from your current software.
- ☐ **2. Vehicle list**
Only if it is kept separate from customers.
- ☐ **3. Outstanding / receivables report**
As of your cut-off date.
- ☐ **4. Stock / inventory report**
With quantities on the cut-off date.
- ☐ **5. Business details**
Legal name, GSTIN, address, logo, bank/UPI, invoice prefix and your last invoice number.
- ☐ **6. Staff and services**
Staff names, roles and phones, plus the services and packages you sell, with prices.
- ☐ **7. Google review link**
If you have one. We put it on every thank-you message.

Most workshop software has an export button under Reports or Customers. No export? A screenshot or a PDF report is fine. We'll type it in.

Five steps. You always know where you are.

1 Request
5 minutes

2 Kick-off call
30 minutes · day 1

3 Data import
Days 2-4

4 Review & training
Days 5-6

5 Go-live day
Day 7

Cut-over advice

- Pick a quiet day, usually a Monday or the day after a holiday.
- Stop billing in the old system the evening before.
- Send us the last stock count and the dues report that night.
- We load them by morning. Your first Driveline invoice goes out the same day.

Questions? WhatsApp the Driveline team any time. We do the typing. You keep working.