Import/Bulk Update Asset Records

For bulk modifications to asset fields, you can export all assets to csv, modify the field content and re-import using the following approach.



SELECT a.asset_code	AS [Barcode],
a.description	AS [Asset Description],
a.product_code	AS [Product Code (Existing)],
I.descriptionv6	AS [Product Description (Existing)],
a.serial_no	AS [Serial No.],
a.vendorv8	AS [Vendor Code (Existing)],
a.location	AS [Bin Location],
a.cost	AS [Cost Price],
a.modelnumber	AS [Model No.],
a.insurer	AS [Insurer],
a.locn	AS [Warehouse Location],
a.homelocn	AS [Home Location],
a.lasttestdate	AS [Last Test Date],
a.testfrequencyd	ays AS [Test Freq. (Days)],
a.operationalsta	tus AS [Test Status],
a.method_tax	AS [Depreciation Method],
a.depn_rate_tax	AS [Depreciation Rate],
a.startdate	AS [Depreciation Start Date],
a.purdate	AS [Purchase Date],
a.ponumber	AS [PO Number]
FROM tblasset01 a	
LEFT OUTER JOII	N tblinvmas I
ON I.pr	oduct_code = a.product_code

Asset P.A.T Information will only show in the Asset Record if the product is configured for P.A.T

- 0 Unknown
- 1 Pass
- 2 Fail
- 3 Re-Test

Re-Importing the Assets via Asset Import

Cut and paste up to 100 assets to a new file, modify the descriptions and import per screenshots below

Oth <u>e</u> rs <u>H</u> elp	
Print Cycle billed	
Import / Export	<u>Export Accounts</u>
Display Log Files	Export Accounts to .CSV
<u>A</u> rchiving	Export Customers Factorial Customers
Extend License Date	Export Distribution List
<u>U</u> tilities	Import Files
Change Operator Ctr	I+F3 <u>G</u> enerate Import Templates
View Current Operators	Import Account Balances
Operator Reports	Excel Export Builder
Open a Second Copy Clin+A	<u>Barcode Scan Import</u>
	n 2019-02-11 12:00 Rental C
RP	Import Files
Import	
O Rental Products	○ Components, Accessories, Alternatives
○ Sales Products	○ Venues
○ Vendors	○ Labor Products
○ Technicians	○ Rental Rates
○ Customers	○ Sale Prices
○ Contacts	 Assets
\bigcirc Customers and Contacts	
Duplicate Records	First Row
○ Skip Them	e Header
 Update Them 	○ Data
	✓ Next × Cancel
RP	
🚳 Load Data 🕞 Validate 🕞 E	xport Records
Paste From Clipboard	
From .CSV File	

For each field loaded, the headers need to be matched to tell RentalPoint what information is in that field. You can click the right hand side of the field to reveal the down arrow and select from the field list or choose 'Ignore' to ignore that field for import....

RP							Import Assets
🖄 Load 🛙	Data	🖻 Validate	🔒 Exp	oort Reco	rds	5	
Status	Import						
		Barcode 🗸	Serial No				Serial No.
		Ignore			^		
	V	Barcode Asset Description			≡	DE	DESCRIPTION
	✓	Product Code (Existing)				00010	Pulsar 6 Way single preset

Or.....If your the headers in your csv file match the field headers that RentalPoint uses, you can use the 'Match Headers' option.

RP		
🎲 Load Data	🗟 Validate 🔒 Export F	Records
Status Impo	🗶 Validate Fields	
	∃ Match Headers	Asset Description

Then validate the fields to highlight any errors....

Ć	🈼 Load (Data	<u>ک</u>	Validate		Export I	Records
	Status	Impo	l,	Validate	Fie	elds	
ľ			30	Match H	lead	ders	escription

Invalid fields will be highlighted in RED

- Use the header selection option to Ignore invalid fields (i.e. do not import those fields)
- or click on the field to edit the value
- or correct the values in the csv file and try importing again

	1	114. 11 1117 10										
	Import Assets											
🎲 Load Data	🛃 Validate	🔒 Export Record	s									
Serial No.	Vendor Code 🗸	Din.	Cost Price	Model No.	Insurer	Warehouse Location	Home Location	Last Test Date	Test Freq. (Days)	Test Status	Depreciation method	De
Serial No.	Vendor Code	Bin Location	Cost Price	Model No.	Insurer	Warehouse Location	Home Location	Last Test Date	Test Freq. (Days)	Test Status	Depreciation Method	De
88997755	5	445566	5 1000	112233	Insurer	(0 (0 2022/01/01	30)	1	1
								· · · · · · · · · · · · · · · · · · ·				
RP						Import A	ssets	-				x
RP Marka Data	🐨 Validate	Export Records				Import A	ssets	•			_ □	x
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RP Seria	Validate	Export Records	Cost Price	Model No.	Insurer	Import A	ssets Home Location	Last Test Date	Test Freq. (Days)	Test Status	Depreciation method	x Dej
RP Seria	Validate Validate Fie Ig 3~ Match Hea	elds Iders	Cost Price	Model No.	Insurer	Import As Warehouse Location	Home Location	Last Test Date	Test Freq. (Days)	Test Status	Depreciation method	x Dej
RP Seria Seria Serial No.	Validate Validate Fié Ig 3 Match Hea Vendor Code	Export Records elds iders	Cost Price	Model No.	Insurer	Import As Warehouse Location Warehouse Location	Home Location	Last Test Date	Test Freq. (Days) Test Freq. (Days)	Test Status Test Status	Depreciation method	x Dej Dej
RP Coad Data Seria Serial No. 88997755	Igi Validate Validate Fir Igi Ber Match Heat Vendor Code	Export Records elds on Bin Location 445566	Cost Price	Model No. Model No. 112233	Insurer Insurer Insurer	Import At Warehouse Location Warehouse Location 0	Home Location	Last Test Date Last Test Date 01/01/2022	Test Freq. (Days) Test Freq. (Days) 30	Test Status Test Status	Depreciation method	X De De
RP Dead Data Serial No. 88997755	I Validate Validate Fir Ig. 3 Match Heat Vendor Code	Export Records elds On Bin Location 445566	Cost Price	Model No. 112233	Insurer Insurer Insurer	Import A Warehouse Location Warehouse Location 0	Home Location Home Location	Last Test Date Last Test Date D1/01/2022	Test Freq. (Days) Test Freq. (Days) 30	Test Status Test Status 1	Depreciation method Depreciation Method	x Dej

	Mon 1/	10/2022 107:00	Lue 1/11/202	/ 19:00 Kei		Ouote				
-			Import Assets							
EV	😚 Load Data	🗹 Validate	🔒 Export Records							
Ξv										
er	Serial No.	Ignore	Bin Location	Cost Price	Model No.	Insurer	Warehouse Location	Home Location	Last Test Date	Test Fre
-										
-	Serial No.	Vendor Code	Bin Location	Cost Price	Model No.	Insurer	Warehouse Location	Home Location	Last Test Date	Test Fr
Ev	88997755		445566	1000	112233	Insurer	0	0	01/01/2022	
-		-							-	•
eri		Errors resolved								

If you're importing a large file, you'll need to wait a while for the validation to complete.....

			Import Assets (Not Responding)		- 5	1 X		
😼 Load 🛙	Load Data 🗟 Validate 🔓 Export Records							
Status	Import					^		
		Barcode	Asset Description	Product Code (Existing)		Seria		
	V	Barcode	Asset Description	Product Code		Seria		
	✓	R10046	Yamaha O1V 96 digital console revised	01VMIX		UAOI		
	✓	R10047	Yamaha O1V 96 digital console rev1	01VMIX		UAOI		
	✓	A10884	Schneider Black Frost 1/8 Filter 4x5.65 rev2	1/8BFF				
	✓	A10885	Schneider Black Frost 1/8 Filter 4x5.65 rev1	1/8BFF				
	✓	A10886	Schneider Black Frost 1/8 Filter 4x5.65 rev2	1/8BFF		~		

After a few minutes the items should show validated as below, click import now to import

EP Import Assets								
j <u>⊾</u> oad	Data 🛃	<u>V</u> alidate 🔒 <u>E</u> xport Re	ecords					
Status	Import							^
		Barcode	Asset Descr	iption		Product Code (Existin	g)	Seria
	V	Barcode	Asset Desc	ription		Product Code		Seria
	~	R10046	Yamaha O1\	/ 96 digital console	revised	01VMIX		UAOI
	✓	R10047	Yamaha O1\	/ 96 digital console	rev1	01VMIX		UAOI
	✓	A10884	Schneider Bl	ack Frost 1/8 Filter 4x5.	65 rev2	1/8BFF		
	~	A10885	Schneider Bl	ack Frost 1/8 Filter 4x5.	65 rev1	1/8BFF		
	~	A10886	Schneider Bl	ack Frost 1/8 Filter 4x5.	65 rev2	1/8BFF		~
<								
Default	Values			Asset Defaults Loca	ation Default			
				Product *		r .		
				Model Number]		
]		
				Bin Location				
Deserie	tion			Vendor		() I		
Descrip				Purchase Price				
				Insurer				
				Update asset locat	ion			
				If you're updating the asset serial number there may be maintenance records attached to the serial number				
				maintenance records as is	e the maintenance records to S.	reflect the new serial number	er, or leave the	
				O Update Maintenance	Records	Leave Maintenance Reco	rds As Is	
						🞲 Import Now	🗙 Can	ncel

....again with a large file you'll need to wait for the 'processing' window to appear and for the import to complete

RP			Import Assets		- 🗆 X
🎲 Load	Data 🛃	Validate 🛛 🔒 Export Re	cords		
Status	Import				^
		Barcode	Asset Description	Product Code (Existing)	Seria
	V	Barcode	Asset Description	Product Code	Seria
	~	R10046	Yamaha O1V 96 digital console revised	01VMIX	UAOI
	~	R10047	Yamaha O1V 96 digital console rev1	01VMIX	UAOI
	~	A10884	Schneider Black Frost 1/8 Filter 4x5.65 rev2	1/8BFF	
	~	A10885	Schneider Black Frost 1/8 Filter 4x5.65 rev1	1/8BFF	
	✓	A10886	Schneider Black Frost 1/8 Filter 4x5.65 rev2	1/8BFF	~
<			Importing, Please Wait (Not Responding)		>
Default	Values				
			Diri Cooddon		

Importing Assets Via Product Import

Below is a query that can be used to export assets for modification and re-import using Product Import.

Key fields marked in RED should NOT be modified. Please take a backup of your database before importing assets as there is no 'undo' option.

Entering a Disposal Date for any asset will change the Disposal Type from Active (still available for rental) to SOLD

Date fields should be entered in YYYY/MM/DD FORMAT

SELECT i.groupfld	AS [Product Group],
i.category	AS [Product Category],
a.product_code	AS [Product Code],
i.descriptionv6	AS [Product Description],
a.asset_code	AS [Bar Code Number],
a.description	AS [Asset Description],
a.modelnumber	AS [Model Number],
a.stock_number	AS [Stock Number],
a.serial_no	AS [Serial Number],
a.vendorv8	AS [Vendor],
a.location	AS [Asset Bin Location],
a.cost A	S [Purchase Price],
a.est_resale	AS [Estimated Resale],
a.disposal_amt	AS [Disposal Amount],
a.wrtn_down_val_tax	AS [Written Down Value],
a.insured_val	AS [Insured Value],
CONVERT(VARCHAR, a.purdate, 10	D1) AS [Purchase Date],
CONVERTIVARCHAR a startdate	

CONVERT(VARCHAR, a.disdate, 101) AS [Disposal Date], a.reval_td AS [Revaluation To Date], a.insurer AS [Insurer], a.accum_depn_tax AS [Accumulated Depreciation], a.depn_rate_tax AS [Depreciation Rate], a.depn_ly_tax AS [Depreciated To Date], a.days_req_service AS [Requires Servicing After...], CONVERT(VARCHAR, a.returnfromservice, 101) AS [Date Last Serviced], CONVERT(VARCHAR, a.nexttestdate, 101) AS [Next Test Date], *CONVERT*(*VARCHAR*, a.lasttestdate, 101) AS [Last Test Date], a.operationalstatus AS [Operational Status], 'This is a TEST Note' AS [Asset Notes] FROM tblasset01 a LEFT OUTER JOIN tblinvmas i ON i.product_code = a.product_code

Import Files option

	Import Files	x
Import		
Rental Products	O Components	, Accessories, Alternatives
O Sales Products	○ Venues	
○ Vendors	O Labour Produ	ucts
○ Technicians	○ Rental Rates	
○ Customers	○ Sale Prices	
○ Contacts	○ Assets	
\bigcirc Customers and Contacts		
Duplicate Records	First Row	File Format
○ Skip Them	Header	Comma Separated (.CSV)
Opdate Them	○ Data	$^{\bigcirc}$ Tabular Delimited
		A Next

mport Fields	RentalPoint Fields	Matching Fiel	ds
Product Group	^ Insurer *		Insurer
Product Category Product Code Product Description Bar Code Number Asset Description Model Number Stock Number Stock Number Serial Number Vendor Asset Bin Location Purchase Price	 Accumulated Depreciation * Depreciation Rate * Depreciated To Date * Requires Servicing After * 	n *	Accumulated Depreciation
			Depreciation Rate
			Depreciated To Date
		.*	Requires Servicing After
	Date Last Serviced *		Date Last Serviced
	Asset Notes * Next Test Date *		Asset Notes
			Next Test Date
Estimated Resale	Last Test Date *		Last Test Date
Disposal Amount	Operational Status *		Operational Status
Insured Value Purchase Date	Test Frequency Days *		•
Inventory Import Options			
You can use the import tool to upd asset serial number there may be m number. You can choose to update serial number, or leave the mainten O Update Maintenance Records	ate asset information. If you're updati iaintenance records attached to the se the maintenance records to reflect th ance records as is.	ing the erial le new 1 3 As Is	2 4