

Import/Bulk Update Asset Records

Last Modified on 02/03/2022 12:48 pm EST

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

Take a backup of your Database..click to see how (do not skip this step)	
Export all assets to csv using this query...click to see how	

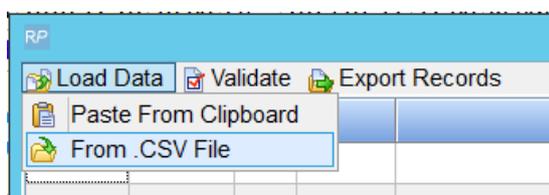
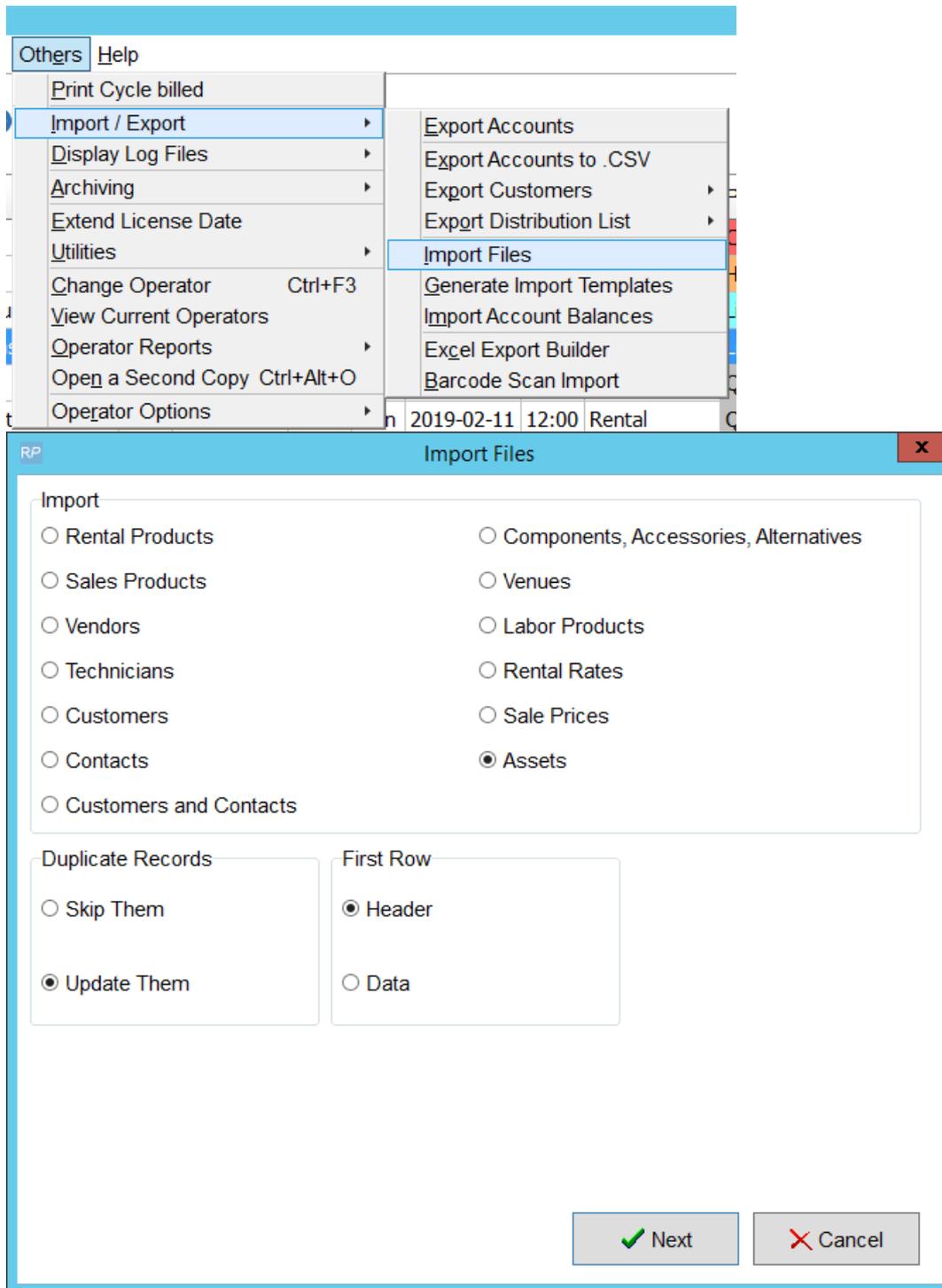
```
SELECT a.asset_code      AS [Barcode],
       a.description     AS [Asset Description],
       a.product_code    AS [Product Code (Existing)],
       I.descriptionv6   AS [Product Description (Existing)],
       a.serial_no       AS [Serial No.],
       a.vendorv8        AS [Vendor Code (Existing)],
       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.testfrequencydays AS [Test Freq. (Days)],
       a.operationalstatus 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 JOIN tblinvmas I
         ON I.product_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](#)

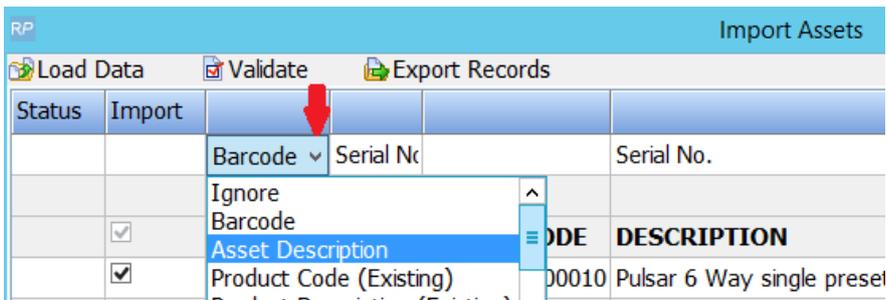
- 0 - Unknown
- 1 - Pass
- 2 - Fail
- 3 - Re-Test

Re-Importing the Assets via Asset Import

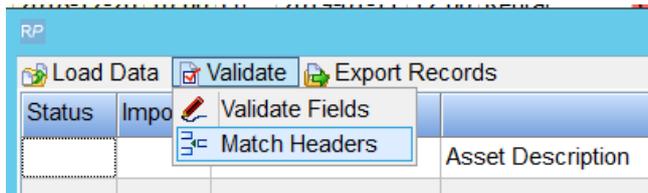
Cut and paste up to 100 assets to a new file, modify the descriptions and import per screenshots below



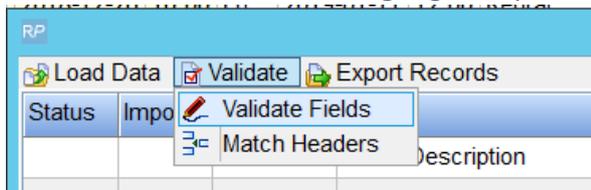
For each field loaded, the headers need to be matched to tell RentalPoint what information is in that field. You can click the right hand side of the field to reveal the down arrow and select from the field list or choose 'Ignore' to ignore that field for import....



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

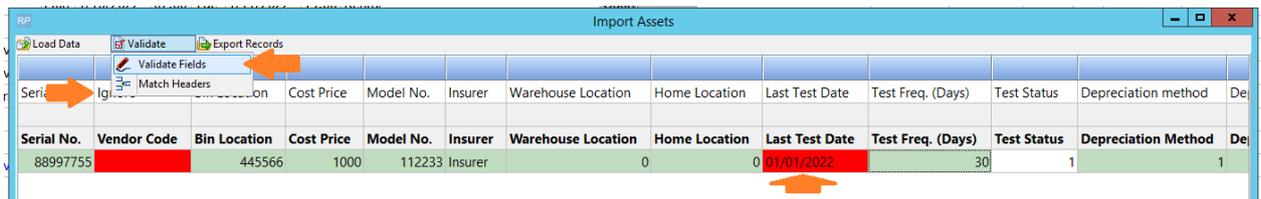
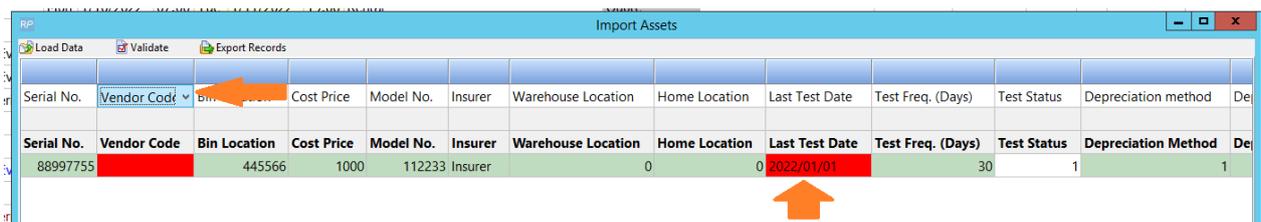


Then validate the fields to highlight any errors....



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



Mon 11/10/2022 10:00 Tue 11/11/2022 19:00 Rental Quote

RP Import Assets

Load Data Validate Export Records

Serial No.	Ignore	Bin Location	Cost Price	Model No.	Insurer	Warehouse Location	Home Location	Last Test Date	Test Fre
88997755		445566	1000	112233	Insurer	0	0	01/01/2022	

Errors resolved

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

RP Import Assets (Not Responding)

Load Data Validate Export Records

Status	Import	Barcode	Asset Description	Product Code (Existing)	Serial
	<input type="checkbox"/>				
	<input checked="" type="checkbox"/>	Barcode	Asset Description	Product Code	Serial
	<input checked="" type="checkbox"/>	R10046	Yamaha O1V 96 digital console revised	01VMIX	UAOI
	<input checked="" type="checkbox"/>	R10047	Yamaha O1V 96 digital console rev1	01VMIX	UAOI
	<input checked="" type="checkbox"/>	A10884	Schneider Black Frost 1/8 Filter 4x5.65 rev2	1/8BFF	
	<input checked="" type="checkbox"/>	A10885	Schneider Black Frost 1/8 Filter 4x5.65 rev1	1/8BFF	
	<input checked="" type="checkbox"/>	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

RP Import Assets

Load Data Validate Export Records

Status	Import	Barcode	Asset Description	Product Code (Existing)	Serial
	<input type="checkbox"/>				
	<input checked="" type="checkbox"/>	Barcode	Asset Description	Product Code	Serial
	<input checked="" type="checkbox"/>	R10046	Yamaha O1V 96 digital console revised	01VMIX	UAOI
	<input checked="" type="checkbox"/>	R10047	Yamaha O1V 96 digital console rev1	01VMIX	UAOI
	<input checked="" type="checkbox"/>	A10884	Schneider Black Frost 1/8 Filter 4x5.65 rev2	1/8BFF	
	<input checked="" type="checkbox"/>	A10885	Schneider Black Frost 1/8 Filter 4x5.65 rev1	1/8BFF	
	<input checked="" type="checkbox"/>	A10886	Schneider Black Frost 1/8 Filter 4x5.65 rev2	1/8BFF	

Default Values

Description

Asset Defaults Location Default

Product *

Model Number

Bin Location

Vendor

Purchase Price

Insurer

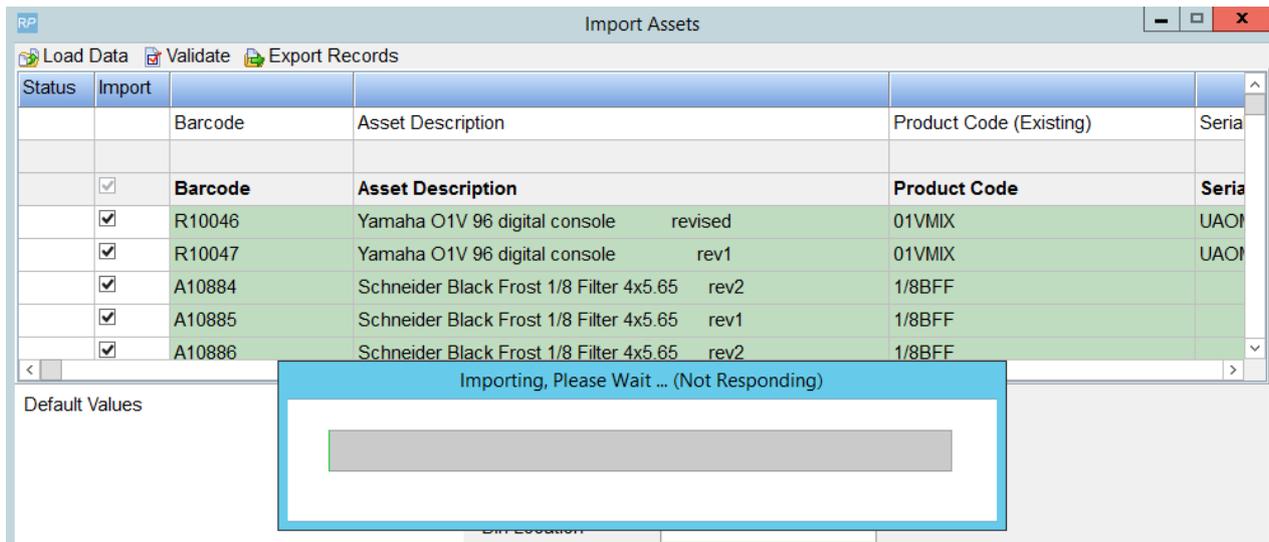
Update asset location

If you're updating the asset serial number there may be maintenance records attached to the serial number. You can choose to update the maintenance records to reflect the new serial number, or leave the maintenance records as is.

Update Maintenance Records Leave Maintenance Records As Is

Import Now Cancel

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



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              AS [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, 101) AS [Purchase Date],
       CONVERT(VARCHAR, a.startdate, 101) AS [Start Date],

```

```

    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 Served],
    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

The screenshot shows the 'Import Files' dialog box with the following configuration:

- Import:**
 - Rental Products
 - Sales Products
 - Vendors
 - Technicians
 - Customers
 - Contacts
 - Customers and Contacts
 - Components, Accessories, Alternatives
 - Venues
 - Labour Products
 - Rental Rates
 - Sale Prices
 - Assets
- Duplicate Records:**
 - Skip Them
 - Update Them
- First Row:**
 - Header
 - Data
- File Format:**
 - Comma Separated (.CSV)
 - Tabular Delimited

Buttons at the bottom:

RP Import Rental Data

Drag fields from 'Import Fields' and drop in 'Matching Fields'.

Import Fields	RentalPoint Fields	Matching Fields
Product Group	Insurer *	Insurer
Product Category	Accumulated Depreciation *	Accumulated Depreciation
Product Code	Depreciation Rate *	Depreciation Rate
Product Description	Depreciated To Date *	Depreciated To Date
Bar Code Number	Requires Servicing After ... *	Requires Servicing After...
Asset Description	Date Last Serviced *	Date Last Serviced
Model Number	Asset Notes *	Asset Notes
Stock Number	Next Test Date *	Next Test Date
Serial Number	Last Test Date *	Last Test Date
Vendor	Operational Status *	Operational Status
Asset Bin Location	Test Frequency Days *	
Purchase Price		
Estimated Resale		
Disposal Amount		
Written Down Value		
Insured Value		
Purchase Date		

Inventory Import Options

You can use the import tool to update asset information. If you're updating the asset serial number there may be maintenance records attached to the serial number. You can choose to update the maintenance records to reflect the new serial number, or leave the maintenance records as is.

Update Maintenance Records
 Leave Maintenance Records As Is

* - Denotes fields that are only related to the asset record