

## Data Import

Depre123 has a data import option to load fixed asset information from a spreadsheet or other software package. From the Manage Assets form click on the “Launch Asset Import Manager” button to see a screen similar to this:

**Asset Import Manager**

[Return to Manage Assets for Acme](#)

[Launch Salesforce Import Wizard](#) [Download CSV Import Template](#)

**Import Specifications**

Select Client to Import for:  Select Import Type:  Replace  Append

**Client Asset Details**

- Total Assets: 190
- Total Asset Value: \$19,043,183.45
- Last Asset Created On: 12/8/2014 5:36 PM

**Import Notes**

- The following columns are required in the data:
  - Asset Name
  - Asset Cost
  - Asset Class
  - Service Date
- Date columns must be in the format of mm/dd/yyyy
- Numeric columns cannot not include a \$ or comma. Examples: "1234323.34" is valid, while "\$1,234,323.34" is not.
- No more than 50,000 assets can be imported at one time through the Salesforce Import Wizard

[Click here to open step-by-step instructions on importing your Assets](#)

The key to converting data is to format all of the fields to match your asset layout. Depre123 includes a utility to create a spreadsheet template by clicking on the “Download CSV Import Template” button. This is a dynamic process that will build the template based on your current asset configuration. You can then use this template to map each column of the spreadsheet to the corresponding field in Depre123.

The basic import process is to select a client to update, choose an Import Type and then start Salesforce import wizard. Here are the detailed steps:

1. Select client to update
2. Click on the Import Type, either Append or Replace and then click on the “Launch Salesforce Import Wizard” button. NOTE: There will be a warning message displayed to ensure you have

selected the correct option before proceeding. Click OK after reading the warning to proceed or Cancel to exit.


3. If you choose OK then you will see a Salesforce Import:


The screenshot shows the 'Choose data' step of the Salesforce Import wizard. At the top, there is a progress bar with three stages: 'Choose data' (active), 'Edit mapping', and 'Start import'. A 'Let's do this' button is positioned above the progress bar. Below the progress bar, the heading 'Import your Data into Salesforce' is displayed, followed by the text 'You can import up to 50,000 records at a time.' and a 'Help for this page' link. The main content area is divided into three sections: 'What kind of data are you importing?', 'What do you want to do?', and 'Where is your data located?'. The 'What kind of data are you importing?' section has two tabs: 'Standard objects' and 'Custom objects'. Under 'Standard objects', there are three options: 'Accounts and Contacts', 'Leads', and 'Solutions', each with a right-pointing arrow. The 'What do you want to do?' and 'Where is your data located?' sections are currently empty. At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Next'.


4. Select Custom Objects and then Asset


This is a close-up of the 'What kind of data are you importing?' section. It features two tabs: 'Standard objects' and 'Custom objects'. The 'Custom objects' tab is selected. Below the tabs, the 'Asset' option is highlighted in light blue and has a green checkmark to its right, indicating it is the selected option.


5. Select Add New Records and set any lookup values


What do you want to do? 


Add new records 


Match by: 

--None-- 

Which User field in your file designates record owners? 

--None-- 


Which Asset Class field in your file do you want to match against to set the Asset Class lookup field? 

Asset Class Name 

6. Select the file to process and click Next to see the mapping

Where is your data located? 

**File**  
Sample Assets.csv 

**Character Code** 

ISO-8859-1 (General US & Western European, ISO-LATIN-1) 

- The field mapping shows each field of the Salesforce Asset object and the associated column in your import file. Before you proceed, you can verify everything is mapped correctly.

#### Edit Field Mapping: Asset

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example
Change	Asset Name	Asset Name	Roof Repairs	Network Equip
Change	Acquisition Date	Acquisition Date	2/10/2014	4/11/2014
Change	Service Date	Service Date	2/10/2014	4/11/2014
Change	Asset Class	Asset Class	B.6	0.12
Change	Asset Cost	Asset Cost	\$41,437.50	\$2,343.75
Change	Company	Company	2	2

- The final screen displays that you are about to add new records to your assets. Click the Start import button to begin processing.

## Review & Start Import

Review your import information and click Start Import.

Your selections:

**Asset** ✓

**Add new records** ✓

✓

Your import **will include:**

**Mapped fields**

**17**

- Salesforce will then respond with a message indicating the import has started.

**Congratulations**, your import has started!

Click OK to view your import status on the Bulk Data Load Job page.

OK

10. Based on the number of records being processed, you can view the results of your import and see when the update is complete.

Bulk Data Load Job

**750o0000001E49J**

View the details of a bulk data load job.

« [Back to List: Bulk Data Load Jobs](#)

<b>Bulk Data Load Job Detail</b>		<input type="button" value="Reload"/>	
Job ID	750o0000001E49J	Status	Closed

At this point your new assets are available for further maintenance and reports.