

Guide to Loading Fixed Asset Tracker data

1.35



Fixed Asset Tracker

A Guide to Loading Fixed Assets and related data

Use this guide and the standard Salesforce Data Import Wizard or APEX Data Loader capabilities to load your existing assets and related data like; current book value, assignments and loans into Fixed Asset Tracker.

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Overview

This guide is designed to be a comprehensive step-by-step workbook that walks you through the process of loading Fixed Assets and related data into Fixed Asset Tracker. There are 3 steps in this document that need to be completed in the order described. Loads of data are dependent on data that has been loaded in the previous step. You must not proceed to the next step until you have successfully loaded all the data in each step.

Data Load Steps

1. Load Fixed Asset Records from Spreadsheet (template provided)
2. Generate and load accumulated depreciation for existing assets (optional if not using depreciation)
3. Load and process Assignment and Loan data (optional)

For step 1, Loading of Fixed Asset Data we have provided a preformatted and heavily commented template for you to follow. You can obtain the latest template from the link on the AccountAbility About Us tab in the application. Be careful that numeric values are formatted in the spreadsheet as numeric columns. This is a common reason for rejected loads.

It is possible that you may encounter a special set of circumstances, in that case we at AccountAbility Solutions offer consulting services at our current hourly rate to assist in the data loading process. We

are confident that the procedures outlined in this document if adhered to carefully and precisely will allow you to load data into your Organization without the need of assistance.

Step 1 Loading Fixed Asset Data

The Load Template

We have provided to you a load sheet template:

Documents library			
LoadingFixedAssets			
Name	Date modified	Type	Size
FixedAsset-LoadingFixedAssets.docx	12/6/2011 7:09 PM	Microsoft Word Document	83 KB
FixedAssetTracker-FixedAssetLoadSheet.xlsx	12/6/2011 6:56 PM	Microsoft Excel Worksheet	16 KB

When you open that Template you will see column names in row 1 and all columns have Excel validation that shows messages describing the column data requirements:

Fixed Asset: Fixed Asset Name										
A	B	C	D	E	F	G	H	I	J	K
1	Fixed Asset: Fixed Asset Name	Asset Tag	Description	Manufacturer	Model	Serial Number	Depreciation Schedule	Fixed Asset Type	Life In Months	Condition
2										
3										
4										
5										
6										
7										
8										

The fields are in the same order that you enter data on the Fixed Asset page in Fixed Asset Tracker with the exception of the current asset holder fields as well as any fields that you do not need to set during the import process:

Fixed Asset testload1

Depreciation Calculations | History Tracking Fixed Asset Movements | Notes & Attachments | Open Activities | Activity History | Fixed Asset Counts

Fixed Asset Detail

Fixed Asset Name: testload1
 Asset Tag: test15
 Description: My New Asset
 Manufacturer: TheMafat
 Model: 12345
 Serial Number: 54321
 Depreciation Schedule: Dec30 Annual
 Fixed Asset Type: Computer
 Insurance Policy: none

Owner: Gordon Derr (Change)
 Company: CoOneFab28
 Cost Center: MyCCGroup
 Active: ☒
 Life in Months: 36
 Condition: Good
 Location Info: My Desk
 IMEI: eieio

Current Asset Holder

Supplier Info

Purchase Date: 01/01/2012
 Supplier: test
 Purchase Order: PO4321

Invoice no: R/S4321
 Original Cost: \$1,000.00
 Salvage Value: \$50.00

Service Contract

Service Contract Expiry Date: 31/12/2014
 Service Contract: SC54321
 Service Company: My Service Company

Service Info: Last Service 1/1/10

Warranty Info

Warranty Expiry Date: 31/12/2014
 Warranty Company: My Warranty Company

Warranty Info: My Warranty Info

Finance Info

Finance Company: My Fin Company
 Finance Expiry Date: 31/01/2015
 Finance Buy Out: \$400.00

Finance Info: My Finance Info

Depreciation

Current Book Value: \$1,000.00
 Accumulated Depreciation: \$0.00

Color-coding within the sample sheet allows you to quickly identify columns with key validations:

Red – Mandatory fields

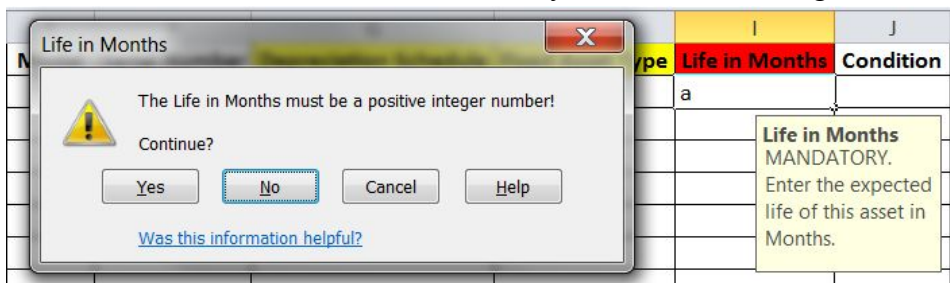
Yellow – Validated fields – meaning the data entered in these columns must match with an associated Fixed Asset Tracker table (Depreciation Schedule, Fixed Asset Type and Supplier)

Blue – Indicates DATE fields (see below for details about date fields)

There are other validations in effect in this spreadsheet:

- Decimal fields are validated to be positive numbers
- Integer fields are validate to be positive numbers with 0 decimal places
- The 'Condition' column has a lookup of valid values

If you enter data that is not valid for a column you will see a message similar to the following:



Remaining Life in Months

Remaining Life In Months may require some additional attention. If you have an asset that is partially depreciated you can calculate the Remaining Life in Months using the following formula.

ROUNDUP(Life In Months * (Current Book Value / Original Cost))

E.G. Remaining life in Months = ROUNDUP(36 * (450 / 2500) = 7 Months

We use ROUNDUP so that any remaining value will be depreciated in the last month of the assets life.

About Dates and Salesforce User Locales

In your Salesforce Org each user is assigned a Locale setting:

User

Gordon Derk

Edit Layout | User Profile | Help for this Page

[Permission Set Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [Remote Access \(0\)](#) | [Login History \(10\)](#)

User Detail

Edit

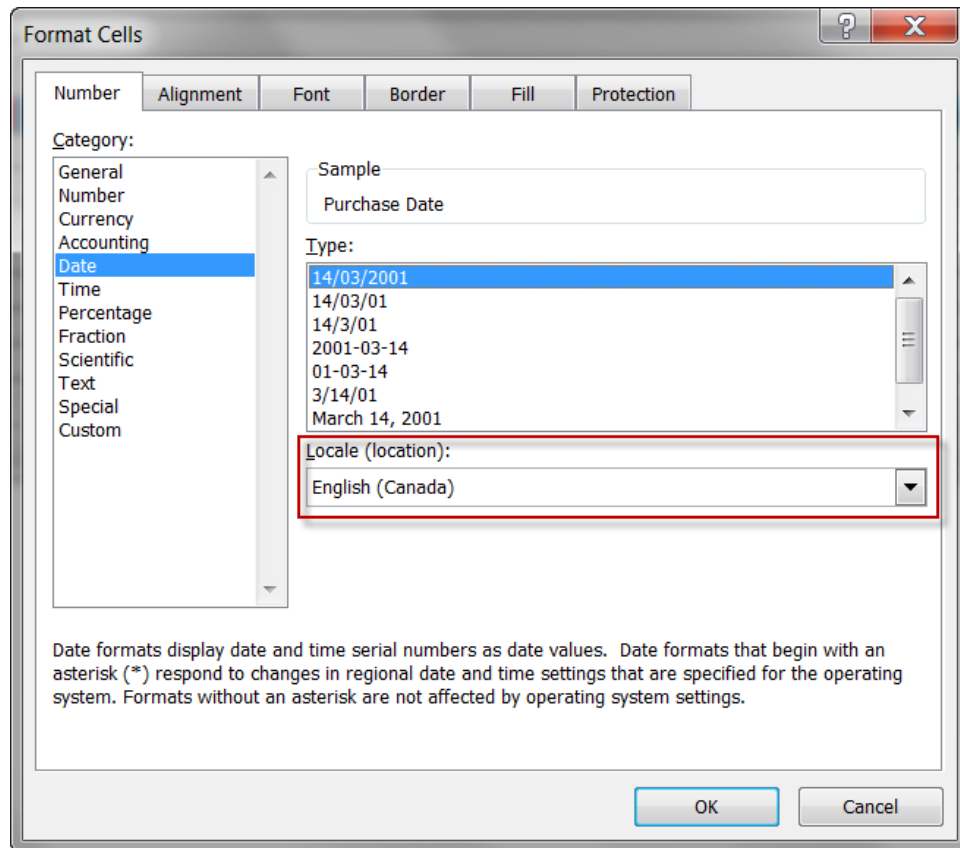
Change Password

Name	Gordon Derk	Role	
Alias	GDerk	User License	Salesforce
Email	gordon.derk@gmail.com	Profile	System Administrator
Username	gderk@shaw.ca	Active	<input checked="" type="checkbox"/>
Community Nickname	gderk1.3067677558908428E12	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input checked="" type="checkbox"/>
Company	Accountability Solutions Inc	Knowledge User	<input type="checkbox"/>
Department	GD	Force.com Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input checked="" type="checkbox"/>
Address	Alberta T6A 1A5 CA	Siteforce Contributor User	<input type="checkbox"/>
Time Zone	(GMT-05:00) Eastern Standard Time (America/New_York)	Siteforce Publisher User	<input type="checkbox"/>
Locale	English (Canada)	Mobile User	<input checked="" type="checkbox"/>
Language	English	Mobile Configuration	
Delegated Approver		Accessibility Mode	<input type="checkbox"/> 1
Manager		Color-Blind Palette on Charts	<input type="checkbox"/> 1
Receive Approval Request Emails	Only if I am an approver	Send Apex Warning Emails	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>	Make Setup My Default Landing Page	<input type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>	Force.com Quick Access Menu	<input checked="" type="checkbox"/>
Federation ID		Development Mode	<input type="checkbox"/>
		Show View State in Development Mode	<input type="checkbox"/>
		Allow Forecasting	<input checked="" type="checkbox"/>

There are 5 date fields in the Fixed Asset Load Template:

	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	Locati	Purchase Date	Su	Pur	In	Or	Ss	Service Contract Expiry Date	Ser	Se	S	Warranty Expiry Date	Wa	Warr	Ins	Insurance Expiry Date	Insur	Financ	Finance Expiry Date

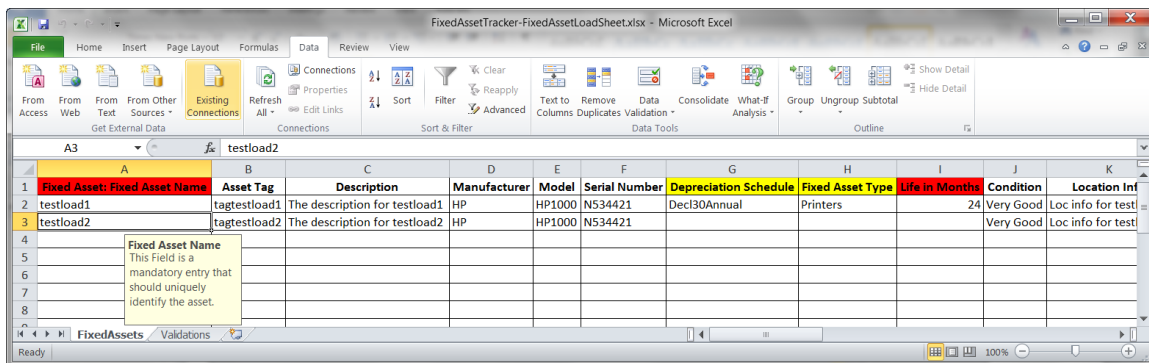
Before you start filling out the Load sheet you need to ensure that these 5 date columns are formatted to the SAME LOCALE as you are using for your User ID in SalesForce:



If this is not done you may receive load error messages during the actual import process.

Preparing your Load Sheet

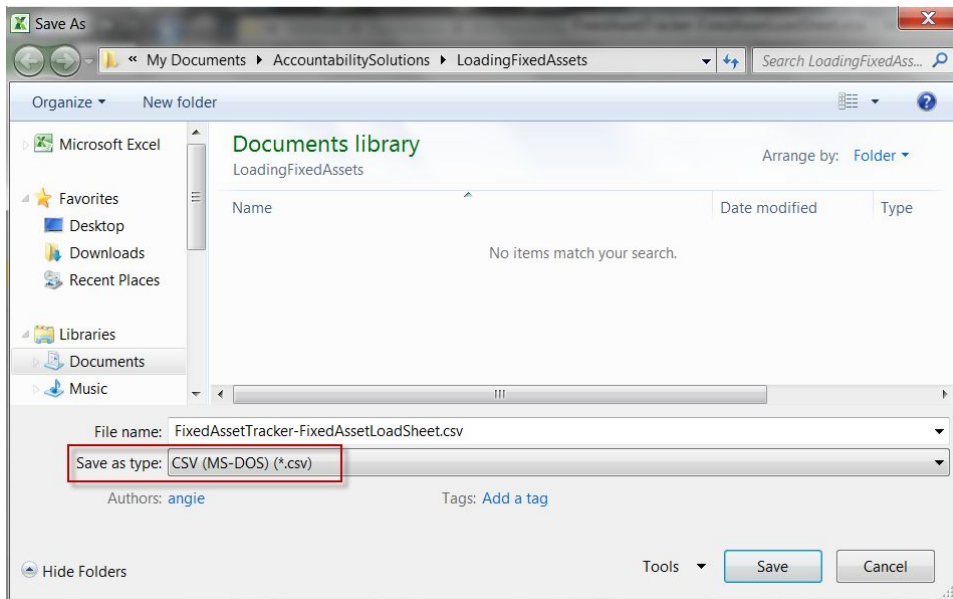
Once the Date Locales match you can go ahead and enter (or copy/paste) data into the Load sheet template:



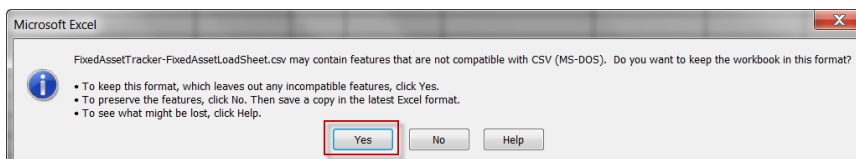
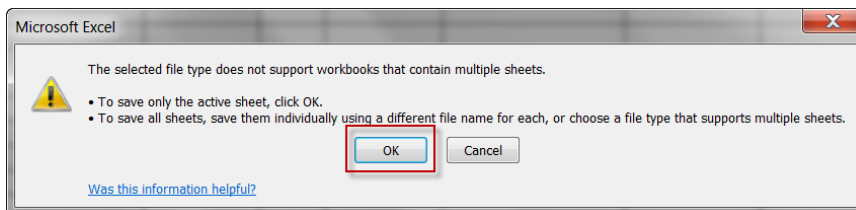
We **STRONGLY** recommend that you start with a small number of records as a test – perhaps 5. In this way you can confirm your data is correct before you have too many records involved.

Save As CSV

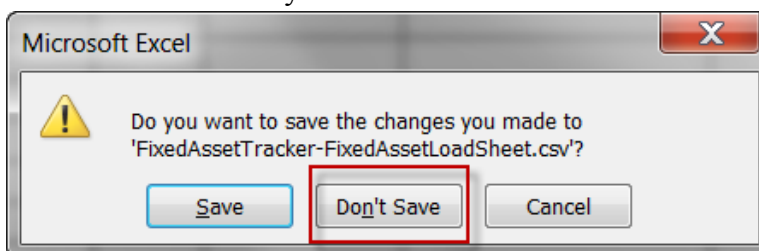
The last step in preparing your load sheet is to use the Excel 'Save As' feature to save your file in CSV format:



During that process you will receive 2 warning messages which you will want to answer in the affirmative:



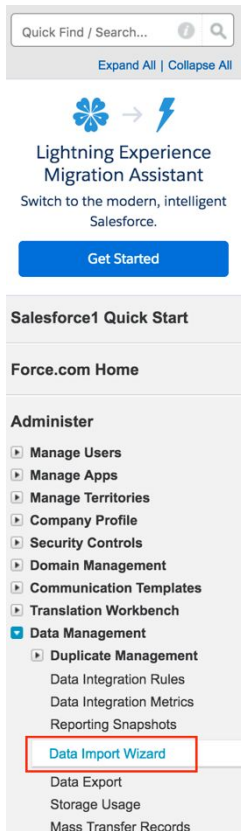
Once you have saved the file you will want to exit out of it and DO NOT SAVE again:



Using Salesforce Data Import Wizard to Load your Assets

In your Salesforce Org select the Setup option:

From the Administrative Setup menu open 'Data Management' and then select 'Data Import Wizard':




On the right pane of the page the Data Import Wizard will be shown:

Data Import Wizard [Help for this page](#)

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
--------	--------	-----------------	-----------------	----------------	------------	----------------------

[Bulk Api Monitoring](#)

 Before you import your data . . .

Clean up your data import file
You'll have fewer errors to resolve if your data file is clean and free of duplicates.
[Watch video](#)


Make sure your field names match Salesforce field names
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields.](#)


Don't import too many records at once
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.


[Collapse](#)


Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.

 Pre-step: Prepare your data for import

 Choose data to import

 Edit field mapping

 Review and start import

[Launch Wizard!](#)

Click the 'Launch Wizard' link to begin.

You will choose the Custom object you are importing – that will be 'Fixed Asset' under the Custom objects tab. Then select to 'Add new records'. Then select the appropriate lookup relationships for the following fields;

- Depreciation Schedule
- Supplier
- Fixed Asset Type
- Insurance
- Configuration

None of the "Assigned *" lookups nor "Loan *" lookups can be loaded at this time.

Add new records ✓

Match by: ?

Which User field in your file designates record owners? ?

Which User field in your file do you want to match against to set the Assigned User lookup field? ?

Which Depreciation Schedule field in your file do you want to match against to set the Depreciation Schedule lookup field? ?

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

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

Which Account field in your file do you want to match against to set the Assigned Account lookup field? ?

Which Contact field in your file do you want to match against to set the Assigned Contact lookup field? ?

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

Which Insurance field in your file do you want to match against to set the Insurance Policy lookup field? ?

Which Configuration field in your file do you want to match against to set the Company lookup field? ?

Then drag the CSV file you created in an earlier step into the file area. Click Next.

A proposed field mapping will be displayed – you should NOT have to make any changes in this step – click the Next button:

Edit Field Mapping: Fixed Assets Help for this page ?

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	Example
Change	Fixed Asset Name	Fixed Asset: Fixed Asset Name	UT Asset 1-2 AA	UT Asset 1-2 AB	UT Asset 1-2 ABCD 2
Change	Acquisition Date	Acquisition Date	5/20/2013	5/20/2013	5/20/2013
Change	Active	Active	1	1	1
Change	Asset Tag	Asset Tag			
Change	Company	Company	Unit Test Config	Unit Test Config	Unit Test Config 1
Change	Fixed Asset Type	Fixed Asset Type			
Change	Manufacturer	Manufacturer			
Change	Model	Model			
Change	Original Cost	Original Cost			
Change	Remaining Life in Months	Remaining Life in Months	59	59	59
Change	Salvage Value	Salvage Value	500	500	500

[Cancel](#)
[Previous](#)
[Next](#)

Review & Start import will be displayed, Click Start Import.

Click the link to monitor the import job. When completed examine any error files generated and reload after correcting the errors.

Once the import job is complete your Fixed Assets should exist!

Fixed Assets Home

View: All Got Edit | Create New View

Recent Fixed Assets

Fixed Asset Name	Fixed Asset Type	Model	Description	Assigned Name
testload2		HP1000	The description for testload2	
testload1	Printers	HP1000	The description for testload1	

Fixed Asset testload1

Depreciation Calculations | History Transactions Fixed Asset Movements | Notes & Attachments | Open Activities | Activity History | Fixed Asset Counts

Fixed Asset Detail

testload1

Asset Tag: test16

Description: My New Asset

Manufacturer: TSMartiff

Model: 12345

Serial Number: 54321

Depreciation Schedule: Dec30Annual

Fixed Asset Type: Computer

Insurance Policy: nmlt102

Owner: Gordon Derr (Change)

Company: CoOneFeb28

Cost Center: MyCCGroup

Active: ☒

Life in Months: 36

Condition: Good

Location Info: My Desk

IMEI: e1e1e1

Current Asset Holder

Supplier Info

Purchase Date: 01/01/2012

Supplier: test

Purchase Order: PO4321

Invoice no: 854321

Original Cost: \$1,000.00

Salvage Value: \$50.00

Service Contract

Service Contract Expiry Date: 31/12/2014

Service Contract: SC54321

Service Company: My Service Company

Service Info: Last Service 1/1/10

Warranty Info

Warranty Expiry Date: 31/12/2014

Warranty Company: My Warranty Company

Warranty Info: My Warranty Info

Finance Info

Finance Company: My Fin Company

Finance Expiry Date: 31/01/2015

Finance Buy Out: \$400.00

Finance Info: My Finance Info


Depreciation

Current Book Value: \$1,000.00

Accumulated Depreciation: \$0.00

Step 2 Generate and Load Accumulated Depreciation Data

Many customers using Fixed Asset Tracker have partially depreciated assets when they are converting to our software. After loading the data into the Fixed Asset object there is one more step that updates the Accumulated Depreciation field on the Fixed Asset record.

 <u>Accumulated Depreciation</u>	AcctSol__Accumulated_Depreciation__c	<u>FixedAssets</u>	Roll-Up Summary (SUM Depreciation Calculation)
---	--------------------------------------	--------------------	--

As you can see the Accumulated Depreciation field is calculated by the system rolling up all the values in the Depreciation Calculation records. Therefore, in order for the system to calculate the correct Accumulated depreciation to date you must create Depreciation Calculation records. This document outlines the steps to follow after successfully loading the Fixed Asset object. The fields Current Book Value, Original Cost and **Remaining Life in Months** must all be loaded on the Fixed Asset records with the appropriate and correct values.

Once the Fixed Asset object is loaded follow the procedures in this document to create and load the Depreciation Calculation object. There are two fields on the Fixed Asset object that need to be updated after Depreciation Calculations have been loaded. They are the Current Book Value and Remaining Life in Months (Months).


Procedure for Loading Accumulated Depreciation

All the data we need to calculate Accumulated Depreciation is already in the Fixed Asset record, so we start by exporting the required data into a spreadsheet. Then we will perform the calculation in the spreadsheet and load the resulting calculation into a single Depreciation Calculation record that will represent the Accumulated Depreciation life to date for the Fixed Asset.

1. Go to the Reports tab and click the New Report button.



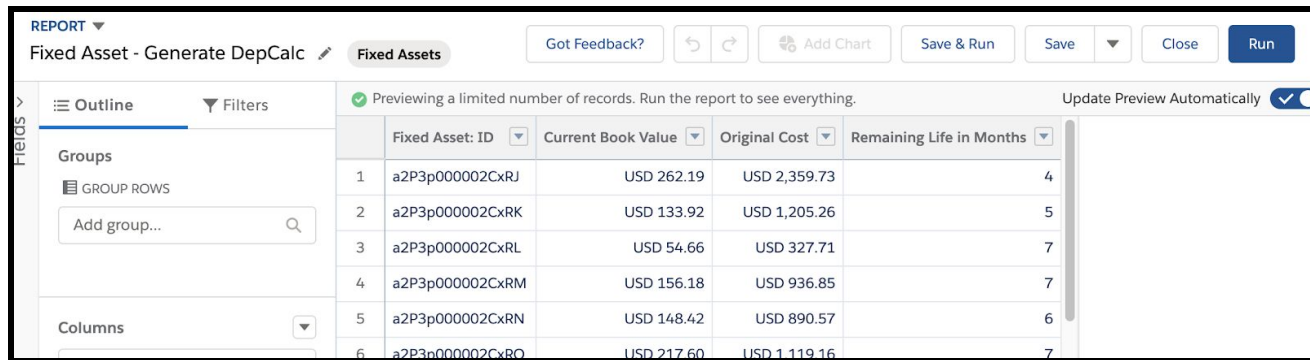
2. Find the Fixed Assets object and click the Create button.

 Create New Report

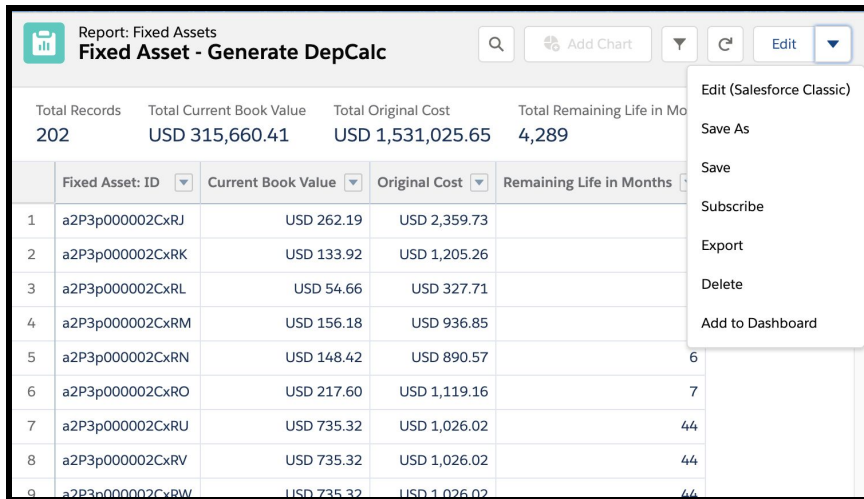
[Help for this Page](#)



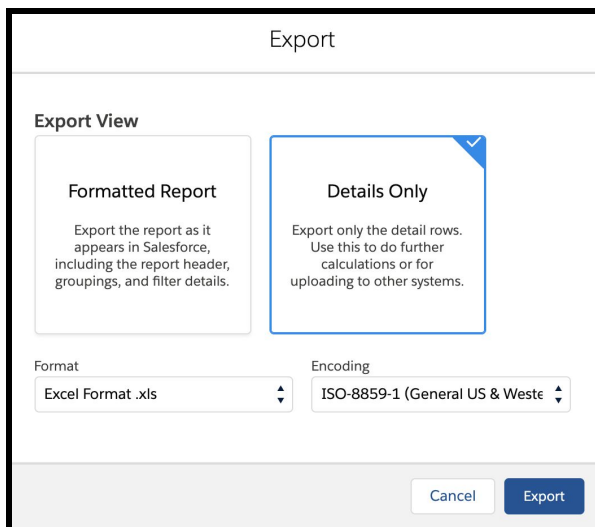
3. Add the following fields to the report;
 - a. Fixed Asset: ID
 - b. Current Book Value
 - c. Original Cost
 - d. Remaining Life in Months



4. Next Click the Run Report button and select Export



5. Select the Details Only option and click Export



6. The system will generate an XLS file and download it to your computer. Find this file and open it with Excel or another compatible spreadsheet program.

	A	B	C	D
1	Fixed Asset: ID	Current Book Value	Original Cost	Remaining Life in Months
2	a2P3p000002CxRJ	262.19	2359.73	4
3	a2P3p000002CxRK	133.92	1205.26	5
4	a2P3p000002CxRL	54.66	327.71	7
5	a2P3p000002CxRM	156.18	936.85	7
6	a2P3p000002CxRN	148.42	890.57	6
7	a2P3p000002CxRO	217.6	1119.16	7
8	a2P3p000002CxRU	735.32	1026.02	44
9	a2P3p000002CxRV	735.32	1026.02	44
10	a2P3p000002CxRW	735.32	1026.02	44
11	a2P3p000002CxRj	213.51	298	43
12	a2P3p000002CxRk	213.51	298	43
13	a2P3p000002CxRI	213.51	298	43
14	a2P3p000002CxRm	15050	21000	43
15	a2P3p000002CxRw	0	0	0
16	a2P3p000002CxRx	183.86	330.91	21

7. Create a new column in the spreadsheet called Depreciated Expense. Make that column be a formula that takes the difference between Original Cost and Current Book Value. Replicate that column for all rows in the spreadsheet.

	A	B	C	D	E
1	Fixed Asset: ID	Current Book Value	Original Cost	Remaining Life in Months	Depreciated Expense
2	a2P3p000002CxRJ	262.19	2359.73	4	2097.54
3	a2P3p000002CxRK	133.92	1205.26	5	1071.34
4	a2P3p000002CxRL	54.66	327.71	7	273.05
5	a2P3p000002CxRM	156.18	936.85	7	780.67
6	a2P3p000002CxRN	148.42	890.57	6	742.15


8. Create a new column called Depreciation type, set the first cell to “Depreciation” and replicate for all rows.
9. Create a new Column called Depr Date and set it to your last month end date based on when your depreciation was run. Replicate for all rows.
10. Edit the Column entitled Current Book Value to Book Value (this will take advantage of the Automatic field mapping)


	A	B	C	D	E	F	G
1	Fixed Asset: ID	Book Value	Original Cost	Remaining Life in Months	Depreciated Expense	Depreciation Type	Depr Date
2	a2P3p000002CxRJ	262.19	2359.73	4	2097.54	Depreciation	09/30/2020
3	a2P3p000002CxRK	133.92	1205.26	5	1071.34	Depreciation	09/30/2020
4	a2P3p000002CxRL	54.66	327.71	7	273.05	Depreciation	09/30/2020
5	a2P3p000002CxRM	156.18	936.85	7	780.67	Depreciation	09/30/2020
6	a2P3p000002CxRN	148.42	890.57	6	742.15	Depreciation	09/30/2020
7	a2P3p000002CxRO	217.6	1119.16	7	901.56	Depreciation	09/30/2020
8	a2P3p000002CxRU	735.32	1026.02	44	290.7	Depreciation	09/30/2020
9	a2P3p000002CxRV	735.32	1026.02	44	290.7	Depreciation	09/30/2020
10	a2P3p000002CxRW	735.32	1026.02	44	290.7	Depreciation	09/30/2020
11	a2P3p000002CxRj	213.51	298	43	84.49	Depreciation	09/30/2020


11. Export the spreadsheet into a CSV file using Save As. Save it in a location you can find like your desktop. You may receive a warning about features being incompatible with the CSV format, accept this warning and save the CSV file regardless.


Go back into the Fixed Asset Tracker system and under Setup search for Data Import Wizard


It is advised that you try a small load just to test the procedure. You can do this by saving a portion of the file you created under another name. Click to Start the Import Wizard and Select the Depreciation Calculation object and Add new records. Make sure you select Salesforce.comID for the Master/Detail relationship.

Add new records


Match by: 
--None--

Which User field in your file designates record owners? 
--None--

Which Fixed Asset field in your file specifies the Master/Detail relationship? 
Salesforce.com ID

Trigger workflow rules and processes? 
☐ Trigger workflow rules and processes for new and updated records

Map the Fixed Asset: ID field to the Fixed Asset field and load the Depreciation Calculation records.

Edit	Mapped Salesforce Object	CSV Header	Example	Example
Change	Fixed Asset	Fixed Asset: ID	a2P3p000002C	a2P3
Change	Book value	Book Value	262.19	133.9
Map	Unmapped ?	Original Cost	2359.73	1205
Change	Remaining Life in Months	Remaining Life in Months	4	5
Change	Depreciated Expense	Depreciated Expense	2097.54	1071
Change	Depreciation Type	Depreciation Type	Depreciation	Depr
Change	Depr Date	Depr Date	09/30/2020	09/3

You have successfully loaded Depreciation Calculations.

Step 3 Loading Assignment and Loan Data

Loading of Assignment or Loan data into Fixed Asset Tracker

Due to the way that Fixed Asset Tracker stores historical assignment and loan data as well as how the current assignments and loans are stored it is not possible to directly load this information while loading the equipment data. Due to the structure of the application and the requirement for APEX triggers to fire when the data for this step is loaded, it is required that you use the APEX data loader. If you attempt to load the data in this step using the Load Custom Objects tool the load will fail. Logging in with the APEX Data Loader requires your security token. Make sure you have this available, for more information consult the documentation on the APEX Data Loader provided by Salesforce.

The APEX data loader requires the use of Salesforce ID data to establish relationships. ID are 13 or 16 character long strings that do not appear to make sense but are in fact an absolutely unique link to a record.

Note that Assets must be assigned before they can be loaned. Some customers assign all assets to a single record since all they really want is to utilize the Loan functionality. If that suits your business model process the Assignments with all assets being assigned to a single record before processing loans.

Use the Report functionality in Salesforce to export your list of assets. You can export additional fields if required to help identify the asset record, like Asset Tag or Serial number.

Open that exported file in a spreadsheet and add the following columns;

Assigned ID = ID of the record you want to assign this equipment to

Record Source = "Load"

Record Type = "Assign"

Assigned Type = "User" or "Contact" or "Account" or "Opportunity"

Assign Date = 1/1/2013 (use the date you want)

	A	B	C	D	E	F
1	ASSET ID	ASSIGNED ID	RECORD SOURCE	RECORD TYPE	ASSIGNED TYPE	ASSIGN DATE
2	a02A00000009PeKK	a02A00000009ISVs	Load	Assign	Account	06/11/2013
3	a02A00000009PeHJ	a02A00000009ISVs	Load	Assign	Account	06/11/2013
4	a02A00000009PeJK	a02A00000009ISVs	Load	Assign	Account	06/11/2013
5	a02A00000009PeLP	a02A00000009ISVs	Load	Assign	Account	06/11/2013
6	a02A00000009PeDR	a02A00000009ISVs	Load	Assign	Account	06/11/2013
7	a02A00000009PeDF	a02A00000009ISVs	Load	Assign	Account	06/11/2013
8	a02A00000009PeXC	a02A00000009ISVs	Load	Assign	Account	06/11/2013
9	a02A00000009PeNM	a02A00000009ISVs	Load	Assign	Account	06/11/2013
10	a02A00000009PeCV	a02A00000009ISVs	Load	Assign	Account	06/11/2013

Save that spreadsheet as a CSV file. Using the APEX Data Loader (you must use the data loader for the next two loads) you will load these records into your org. First you must set the batch size to 1. When the data loader starts hit the Cancel button to show the menu. From the Settings menu, select settings. Set the batch size to 1 and click OK.

Click the Insert button on the data loader and provide your user name, password and security token (appended to your password).

Then load the data above into the Data Interface object. Leave the ID of the Data Interface object blank as it will get generated on load.

Load Inserts

Apexdataloader

Step 2: Select data objects
Select your Salesforce object and your CSV file.

Select Salesforce object:

☐ Show all Salesforce objects

- About Us (AcctSol_About_Us_c)
- Account (Account)
- Case (Case)
- Configuration (AcctSol_Configuration_c)
- Contact (Contact)
- Data Interface (AcctSol_Data_Interface_c)**
- Data Interface Processing History (AcctSol_Data_Interface_Processing_History_c)
- Depreciation Calculation (AcctSol_Depreciation_Calculation_c)
- Depreciation Journal Entry (AcctSol_Depreciation_Journal_Entry_c)

Choose CSV file: **Browse...**

< Back **Next >** **Finish** **Cancel**

The next step is to create a data load map to match the field names in your data file to the field names in the Data Interface object. Click “Create or Edit a Map” on the Step 3 page. Now drag and drop the fields from the AcctSol Data Interface object to match the fields in your CSV file. Use the screen below as a guide to setting the correct values for the data map.

Mapping Dialog

Match the Salesforce fields to your columns.

Clear Mapping Auto-Match Fields to Columns

Name	Label	Type
AcctSol_Assigned_Name__c	Assigned Name	string
AcctSol_Count_Date_Time__c	Count Date Time	datetime
AcctSol_Equipment_Name__c	Equipment Name	string
AcctSol_Equipment_Tag__c	Equipment Tag	string
AcctSol_GPS_Lat__c	GPS Lat	_double
AcctSol_GPS_Long__c	GPS Long	_double
AcctSol_Last_Processing_Message__c	Last Processing Message	textarea
AcctSol_Loan_Actual_Return_Date__c	Loan Actual Return Date	date

Drag the Salesforce fields down to the column mapping. To remove a mapping, select a row and click Delete.

File Column Header	Name
ASSET ID	AcctSol_Equipment_ID__c
ASSIGN DATE	AcctSol_Assigned_Date__c
ASSIGNED ID	AcctSol_Assigned_ID__c
ASSIGNED TYPE	AcctSol_Assigned_Type__c
RECORD SOURCE	AcctSol_Record_Source__c
RECORD TYPE	AcctSol_Record_Type__c

OK Save Mapping Cancel

Click OK and then Next to move to the next step. Accept the file and directory for the error reporting, and then click Finish. The DataLoader will process the records and report on success and failures. Once assets have been assigned they can be loaned. You can repeat the process above with a Record Type of Loan, using Loaned ID, Loan Type and Loan Date.