

Loading Equipment, Assignment and Loan data into ELTON



This guide is to assist system administrators in loading data into ELTON. Throughout this guide we utilize the Salesforce Data Import Wizard. Alternatively you may wish to use the APEX Dataloader. In this document we will utilize the Lightning User Experience. You can accomplish the same tasks with the Classic UX. Data must be loaded in few passes, and these passes must be done in a specific sequence; 1.Equipment, 2.Assignments and 3.Loans.



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Loading Equipment and Related Data into ELTON

Equipment loading should be done using the provided template available from the AccountAbility About Us tab in the application. Obtain the current equipment load template from the AccountAbility About Us tab in the ELTON application.



Install link for our Sample Reports Package: [ELTON Report Package for Developer or Production orgs](#)

[ELTON Report Package for Sandbox orgs](#)

Download link for ELTON Configuration Guide : [ELTON Configuration Guide](#)

Download link for Data Load Template :

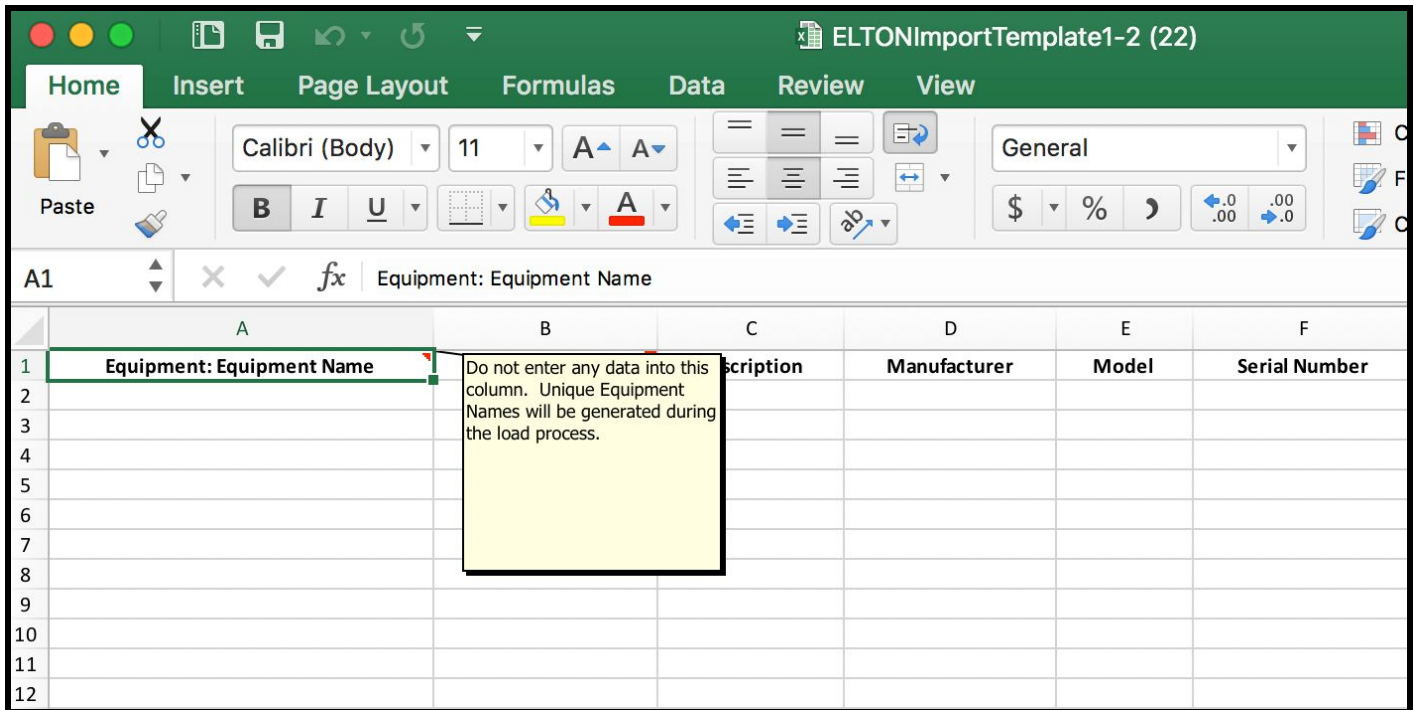
[Data Load Template](#)

Download link for Loading Equipment, Assignment and Loan Data into ELTON : [Guide to Loading Equipment, Assignment or Loan Data into ELTON](#)

Download link for Setting up Equipment Images in ELTON : [Equipment Images Documentation Link](#)

Populate this spreadsheet with the equipment data you wish to load. Refrain from changing the column titles, as they will automatically map to the equipment columns if left alone. If you have added custom fields to the equipment object that you wish to load, you may add those columns into the spreadsheet to allow for the data loading of custom fields.

Note that in the spreadsheet there are float-over tips to assist with data compliance rules. Follow these rules to ensure that the data loads correctly.



Equipment Type and Insurance

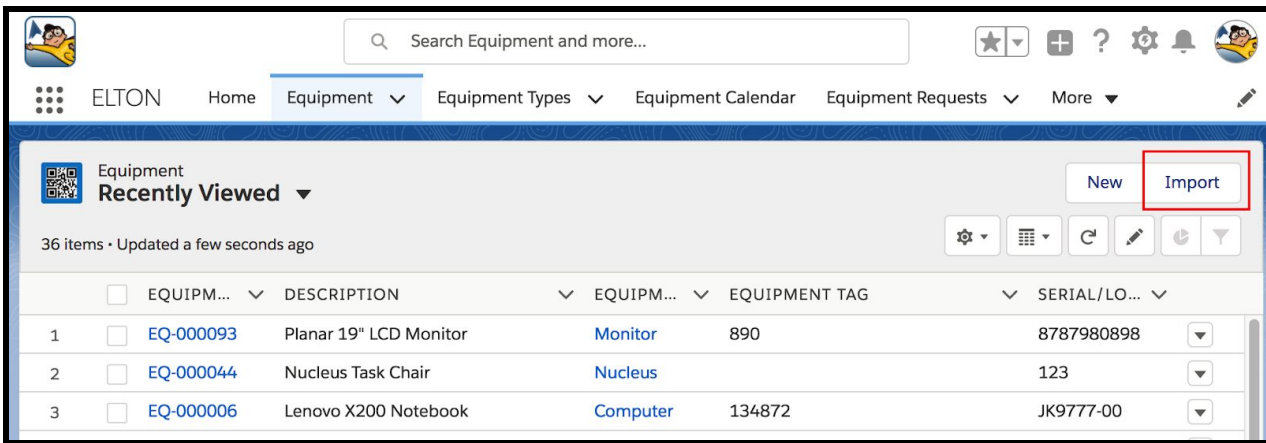
If you choose to use Equipment Types or Insurance, you should populate those objects prior to loading Equipment data. You may enter those records manually or use Data Import Wizard to load Equipment Types and Insurance.

Loading Equipment

The screenshot shows the Excel interface for the 'ELTONImportTemplate1-2 (22)' spreadsheet. The 'Home' tab is active. The spreadsheet is populated with data for equipment. The columns are labeled A through I: A (Equipment Name), B (Equipment Tag), C (Description), D (Manufacturer), E (Model), F (Serial Number), G (Equipment Type), H (Active), and I (Pull from Service). The data is as follows:

Equipment Name	Equipment Tag	Description	Manufacturer	Model	Serial Number	Equipment Type	Active	Pull from Service
Equipment: Equipment Name	9980	Apple Macbook Pro 15"	Apple	Macbook Pro 15	JK8768766	Computer	1	
	9981	Apple Macbook Pro 15"	Apple	Macbook Pro 15	JK8768767	Computer	1	
	9982	Apple Macbook Pro 15"	Apple	Macbook Pro 15	JK8768768	Computer	1	
	9983	Apple Macbook Pro 15"	Apple	Macbook Pro 15	JK8768769	Computer	1	
	9984	Apple Macbook Pro 15"	Apple	Macbook Pro 15	JK8768760	Computer	1	

Once you have your data loaded into your spreadsheet, save that as a CSV file. Start the Data Import Wizard. You have two choices for starting the wizard; 1) goto the Equipment tab and click the Import button, 2) goto Setup > Data > Data Import Wizard. As it saves steps below we have used option 1.



Equipment Recently Viewed ▾

36 items • Updated a few seconds ago

	EQUIPM...	DESCRIPTION	EQUIPM...	EQUIPMENT TAG	SERIAL/LO...
1	EQ-000093	Planar 19" LCD Monitor	Monitor	890	8787980898
2	EQ-000044	Nucleus Task Chair	Nucleus		123
3	EQ-000006	Lenovo X200 Notebook	Computer	134872	JK9777-00

When the Data Import Wizard opens you will select the following for each pane;

What kind of data are you importing?

Custom objects - Equipment, click on the word Equipment (it has been pre-selected if you opened using the button on the Equipment page)

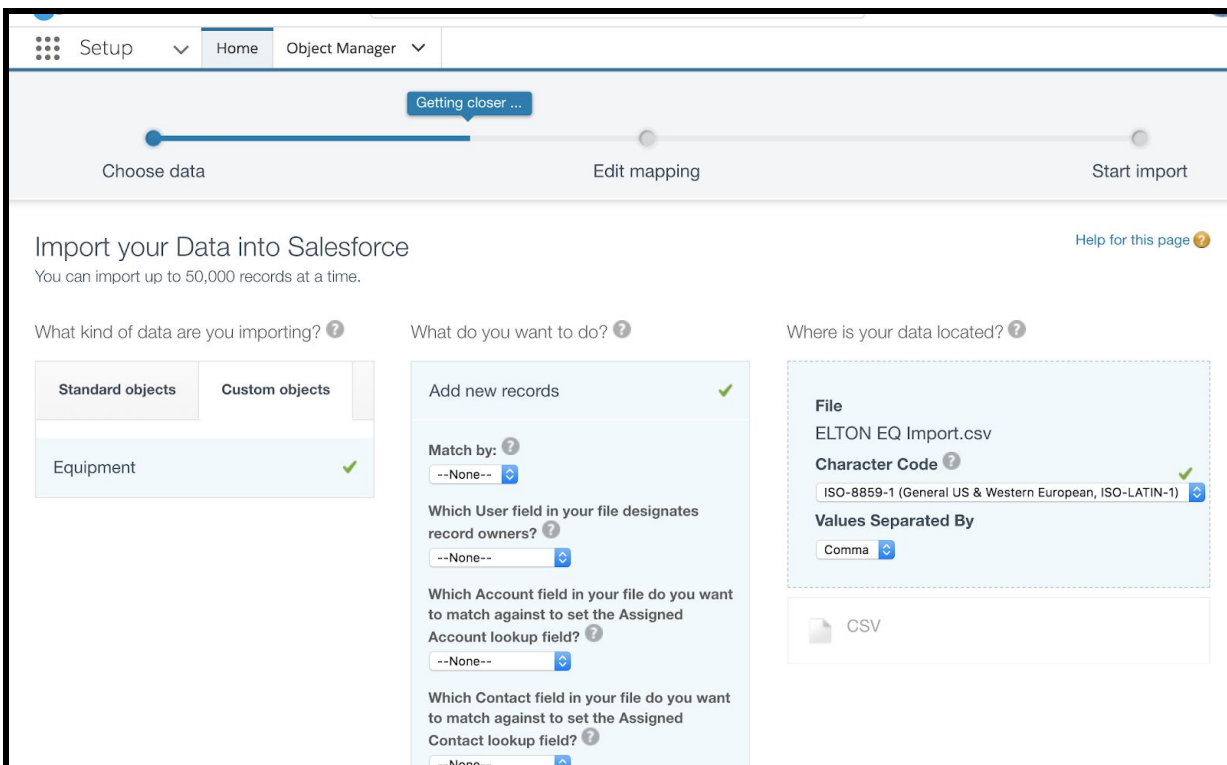
What do you want to do?

Add new records, click here

A series of questions will be revealed. Do not set any values for Assigned* or Loan* fields. During a typical load you will want to set the correct values for Insurance and Equipment Type lookup if you have previously loaded that data.

Where is your data located?

Drag the CSV file you saved earlier onto the drop spot.



Getting closer ...

Choose data Edit mapping Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing? ?

Standard objects Custom objects

Equipment ✓

What do you want to do? ?

Add new records ✓

Match by: ?

--None-- ⌵

Which User field in your file designates record owners? ?

--None-- ⌵

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

--None-- ⌵

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

--None-- ⌵

Where is your data located? ?

File

ELTON EQ Import.csv

Character Code ?

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

Values Separated By

Comma ⌵

CSV

Click Next

The columns should all map correctly. You will be shown a data preview that will allow you to visually confirm that your data is going to be loaded into the correct fields. Equipment Name will be marked as Unmapped, this is correct.

Choose data

Almost done

Start import

Edit mapping

Edit Field Mapping: Equipment

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
Map	Unmapped	Equipment: Equipment Name			
Change	Equipment Tag	Equipment Tag	9980	9981	9982
Change	Description	Description	Apple Macbook Pro 15"	Apple Macbook Pro 15"	Apple Macbook Pro 15"
Change	Manufacturer	Manufacturer	Apple	Apple	Apple
Change	Model	Model	Macbook Pro 15	Macbook Pro 15	Macbook Pro 15
Change	Serial/Lot-no	Serial Number	JK8768766	JK8768767	JK8768768
Change	Equipment Type	Equipment Type	Computer	Computer	Computer
Change	Active	Active	1	1	1
Change	Pull from Service	Pull from Service			

Cancel

Previous

Next

Click Next

You will be presented with an overview of the field mapping, review this page and if click Previous to make any changes.

Choose data

Edit mapping

Great job

Start import

Review & Start Import

Help for this page

Review your import information and click Start Import.

Your selections:

Equipment ✓

Add new records ✓

✓

Your import will include:

Mapped fields

10

Your import will not include:

Unmapped fields

2

Cancel

Previous

Start Import

Click Start Import

You will then be directed to the Bulk Data Load Jobs page. This will show you the results of your data load. If there are failed records, click on the View Result link to see the errors, resolve the indicated error and reload your data. Congratulations, you have Equipment data loaded!

Loading Equipment Assignments

All equipment must be assigned and active before it can be loaned. Therefore after loading your equipment data using the supplied template, you will next need to assign equipment. Some customers assign all equipment 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 equipment being assigned to a single record before processing loans.

Turn off Chatter before you process Assignments and Loans. Re-enable Chatter when complete.

Chatter will create a posting with each assignment and loan if left turned on. This is usually highly undesirable.

It may seem counterintuitive but the process of loading Assignment data begins with an export of the Equipment records that you will be assigning. This is required to obtain the Equipment ID which is a unique identifier used by Salesforce.

1. Goto Reports and click the "New Report" button
2. Select Equipment as the report type and click "Create"
3. Drag the Equipment: ID field into the report
4. Drag any other fields you may wish to use to assist in identifying the record into the report
5. Click "Run Report" then from the report page click "Export"
6. Change the export file format to Comma Delimited .csv and click "Export"
7. Open the file in a spreadsheet such as Excel
8. Save the worksheet

You will now take the data in that work sheet and add additional columns to provide the Assignment data.

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

Assign Date = 2018-01-01 (use the julian format shown left to ensure your date loads correctly)

Assigned ID = The SFDC ID of the record. This is used to associate the record to the Equipment

Assignment. You may need to export all your associated records and use Vlookup to find the

Salesforce ID. In this case I have just found the SFDC ID for the user I am using and pasted it into the CSV.

Note: For Contact and Account you can use the Name field and do not need to obtain the SFDC ID for those types of records.

	A	B	C	D	E	F
1	Equipment: Equipment Name	Equipment: ID	Description	Assigned-type	Assigned-date	Assigned ID
2	EQ-000095	a0K1J00000Ez3MF	Apple Macbook Pro 15"	User	2018-03-29	005o000000JGvy
3	EQ-000096	a0K1J00000Ez3MG	Apple Macbook Pro 15"	User	2018-03-29	005o000000JGvy
4	EQ-000097	a0K1J00000Ez3MH	Apple Macbook Pro 15"	User	2018-03-29	005o000000JGvy
5	EQ-000098	a0K1J00000Ez3MI	Apple Macbook Pro 15"	User	2018-03-29	005o000000JGvy
6	EQ-000094	a0K1J00000Ez3ME	Apple Macbook Pro 15"	User	2018-03-29	005o000000JGvy
7						

Loading Assignment data must be done based on the Assigned Type field. If you are only assigning to one type (as in my example above) then you can work with a single file. If you have assignments to Users, Contacts, Accounts and Opportunities, you may have as many as 4 files to load. Save each file filtered on Assigned Type (User, Contact, Account and Opportunity) as a separate CSV.

Start the Data Import Wizard again. This time you will need to use the Setup > Data > Data Import Wizard to start the wizard. Scroll down till you see the Launch Wizard! Button and click it.

When the Data Import Wizard opens you will select the following for each pane;

What kind of data are you importing?

Custom objects - Equipment Assignments

What do you want to do?

Add new records, click here

A series of questions will be revealed.

Based on the Assigned Type you are loading you will answer the appropriate question. In this case I select Salesforce.com ID to find the User.

Where is your data located?

Drag the CSV file you saved earlier onto the drop spot.

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

?

Salesforce.com ID

Getting closer ...

Choose data

Edit mapping

Start import

Import your Data into Salesforce

You can import up to 50,000 records at a time.

[Help for this page](#)

What kind of data are you importing?

Standard objects

Custom objects

- Data Interface Processing Histories
- Data Interfaces
- Equipment Assignment and Loan Settings
- Equipment Assignments
- Equipment Calendar
- Equipment Chatter Setting

What do you want to do?

Add new records

Match by:

--None--

Which User field in your file designates record owners?

--None--

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

--None--

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

--None--

Where is your data located?

File

AssignImport.csv

Character Code

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

Values Separated By

Comma

CSV

Cancel

Previous

Next

Click Next

On this Field Map, you will need to make some changes.

Click Map next to Equipment: ID, select Equipment

Click Map next to Assigned ID, select User (Or Contact, Account or Opportunity based on which Assigned Type you are currently loading)

Almost done

Choose data
Edit mapping
Start import

Edit Field Mapping: Equipment Assignments 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
Map	Unmapped ?	Equipment: Equipment Name	EQ-000095	EQ-000096	EQ-000097
Change	Equipment	Equipment: ID	a0K1J00000	a0K1J00000	a0K1J00000Ez3MH
Map	Unmapped ?	Description	Apple Mac	Apple Mac	Apple Macbook Pro 15"
Change	Assigned Type	Assigned-type	User	User	User
Change	Assigned Date	Assigned-date	2018-03-29	2018-03-29	2018-03-29
Change	User	Assigned ID	005o000000	005o000000	005o000000JGvy

Cancel
Previous
Next

Click Next

Again the field map summary will be presented, click Previous to edit or click Start Import to proceed.

You will be directed to the Bulk Data Load Jobs page. Here you can monitor your job and review results as necessary. Repeat the steps above for each Assigned type you are loading. User, Contact, Account and Opportunity as required.

Loading Multiple Assignments for a single Equipment record

This is possible, the only restriction is that they must be loaded in chronological order from oldest to newest. Each assignment ends only when a new assignment begins. The Assignment return date must be equal to or past the Assignment Date. So as you load a series of chronological assignments for a single piece of Equipment ELTON will set the Assignment Return Date automatically to the next assignment records Assignment Date.

Loading Equipment Loan Data

Just like with Assignment we start by exporting the Equipment that you wish to load Loan data.

1. Goto Reports and click the "New Report" button

2. Select Equipment as the report type and click "Create"
3. Drag the Equipment: ID field into the report
4. Drag any other fields you may wish to use to assist in identifying the record into the report
5. Click "Run Report" then from the report page click "Export"
6. Change the export file format to Comma Delimited .csv and click "Export"
7. Open the file in a spreadsheet such as Excel
8. Save the worksheet

You will now take the data in that work sheet and add additional columns to provide the Assignment data.

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

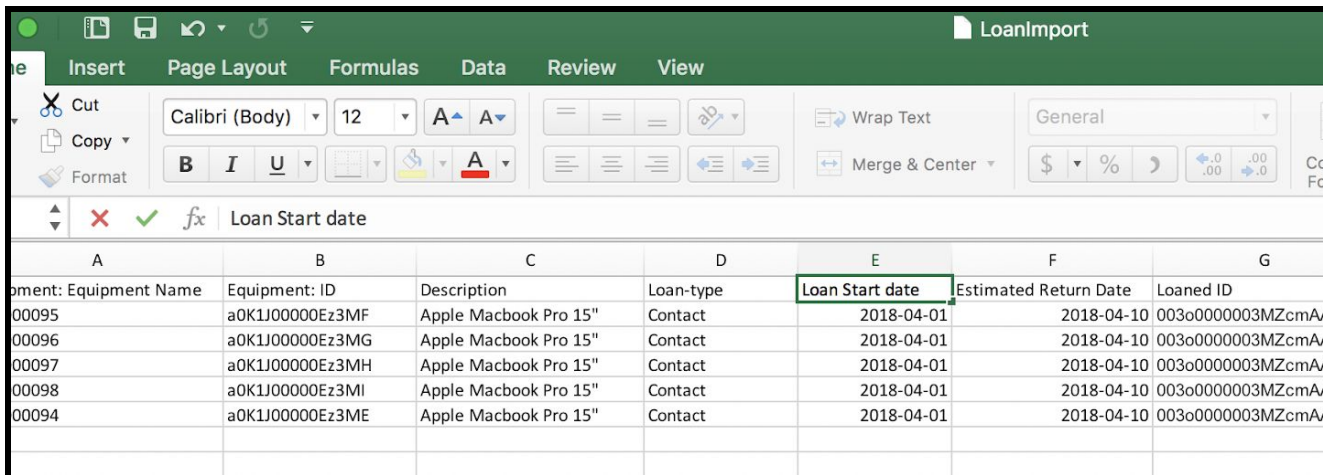
Loan Start Date = 2018-01-01 (use the julian format shown left to ensure your date loads correctly)

Estimated Return Date = 2018-01-02 (use the same julian format shown left))

Loaned ID = The SFDC ID of the record. This is used to associate the record to the Equipment Loan.

You may need to export all your associated records and use Vlookup to find the Salesforce ID. In this case I have just found the SFDC ID for the user I am using and pasted it into the CSV.

Note: For Contact and Account you can use the Name field and do not need to obtain the SFDC ID for those types of records.



A	B	C	D	E	F	G
Equipment: Equipment Name	Equipment: ID	Description	Loan-type	Loan Start date	Estimated Return Date	Loaned ID
00095	a0K1J00000Ez3MF	Apple Macbook Pro 15"	Contact	2018-04-01	2018-04-10	003o0000003MZcmA
00096	a0K1J00000Ez3MG	Apple Macbook Pro 15"	Contact	2018-04-01	2018-04-10	003o0000003MZcmA
00097	a0K1J00000Ez3MH	Apple Macbook Pro 15"	Contact	2018-04-01	2018-04-10	003o0000003MZcmA
00098	a0K1J00000Ez3MI	Apple Macbook Pro 15"	Contact	2018-04-01	2018-04-10	003o0000003MZcmA
00094	a0K1J00000Ez3ME	Apple Macbook Pro 15"	Contact	2018-04-01	2018-04-10	003o0000003MZcmA

Loading Loan data must be done based on the Loan Type field. If you are only loaning to one type (as in my example above) then you can work with a single file. If you have loans to Users, Contacts, Accounts and Opportunities, you may have as many as 4 files to load.

Save each file filtered on Loan Type (User, Contact, Account and Opportunity) as a separate CSV.

Start the Data Import Wizard again. This time you will need to use the Setup > Data > Data Import Wizard to start the wizard. Scroll down till you see the Launch Wizard! Button and click it.

When the Data Import Wizard opens you will select the following for each pane;

What kind of data are you importing?

Custom objects - Equipment Loans

What do you want to do?

Add new records, click here

A series of questions will be revealed.

Based on the Loan Type you are loading you will answer the appropriate question.

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

Salesforce.com ID

In this case I select Salesforce.com ID to find the Contact.

Where is your data located?

Drag the CSV file you saved earlier onto the drop spot.

The screenshot shows the 'Choose data' step of the Salesforce Data Import Wizard. At the top, a progress bar indicates the current step is 'Choose data', with 'Edit mapping' and 'Start import' following. A 'Getting closer ...' tooltip is visible above the progress bar. The main heading is 'Import your Data into Salesforce', with a sub-note: 'You can import up to 50,000 records at a time.' and a 'Help for this page' link. The interface is divided into three columns: 'What kind of data are you importing?', 'What do you want to do?', and 'Where is your data located?'. The first column has two tabs: 'Standard objects' (selected) and 'Custom objects'. Under 'Standard objects', a list includes 'Data Interface Processing Histories', 'Data Interfaces', 'Equipment Assignment and Loan Settings', 'Equipment Assignments', 'Equipment Calendar', and 'Equipment Chatter Setting', each with a right-pointing arrow. The second column, 'What do you want to do?', has a title 'Add new records' with a green checkmark. It contains three sections, each with a question and a dropdown menu: 'Match by:' (dropdown: '--None--'), 'Which User field in your file designates record owners?' (dropdown: '--None--'), and 'Which Account field in your file do you want to match against to set the Account lookup field?' (dropdown: '--None--'). Below these is another question: 'Which Contact field in your file do you want to match against to set the Contact lookup field?' (dropdown: 'Salesforce.com ID'). The third column, 'Where is your data located?', has a dashed border and contains a 'File' section with 'LoanImport.csv', a 'Character Code' dropdown (set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)' with a green checkmark), and a 'Values Separated By' dropdown (set to 'Comma'). Below this is a 'CSV' file icon and a text input field. At the bottom right, there are three buttons: 'Cancel', 'Previous', and 'Next' (highlighted in green).

Click Next

On this Field Map, you will need to make some changes.

Click Map next to Equipment: ID, select Equipment

Click Map next to Loaned ID, select Contact (Or User, Account or Opportunity based on which Loan Type you are currently loading)

Almost done

Choose data
Edit mapping
Start import

Edit Field Mapping: Equipment Loans

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
Map	Unmapped ?	Equipment: Equipment Name	EQ-000095	EQ-000096	EQ-000097
Change	Equipment	Equipment: ID	a0K1J00000	a0K1J00000	a0K1J00000Ez3MH
Map	Unmapped ?	Description	Apple Mac	Apple Mac	Apple Macbook Pro 15"
Change	Loan Type	Loan-type	Contact	Contact	Contact
Change	Loan Start Date	Loan Start date	2018-04-01	2018-04-01	2018-04-01
Change	Estimated Return Date	Estimated Return Date	2018-04-10	2018-04-10	2018-04-10
Change	Contact	Loaned ID	003o000000	003o000000	003o0000003MZcmAAG

Cancel
Previous
Next

Click Next

Again the field map summary will be presented, click Previous to edit or click Start Import to proceed.

You will be directed to the Bulk Data Load Jobs page. Here you can monitor your job and review results as necessary. Repeat the steps above for each Loan Type you are loading. User, Contact, Account and Opportunity as required.

Loading Multiple Loans for a single Equipment record

This can get quite involved. If you need to load historical Loan data (more than the current loan) we recommend you contact us at support@accountabilitycorp.com for assistance.