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 a few passes, and these passes must be done in a specific sequence; 1.Equipment, 2.Assignments and 3.Loans.

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.

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.
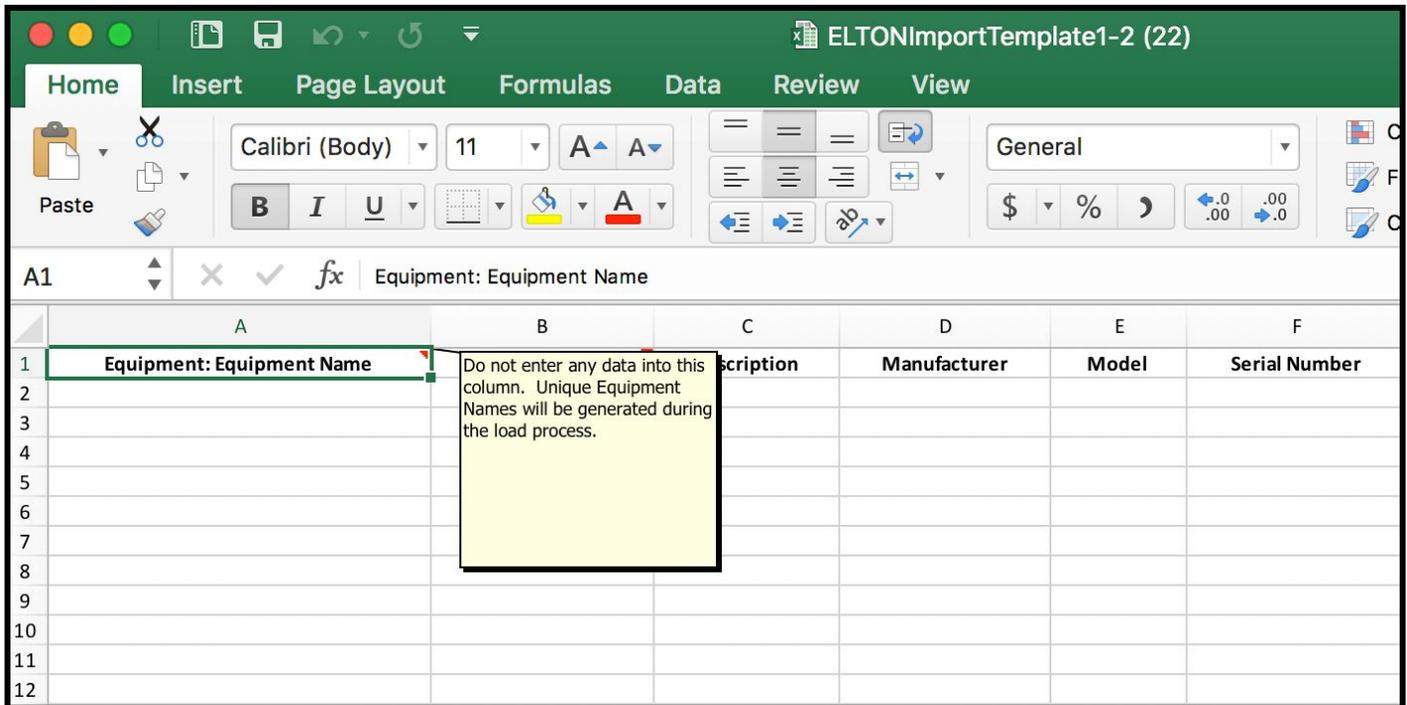

Equipment Type and Insurance

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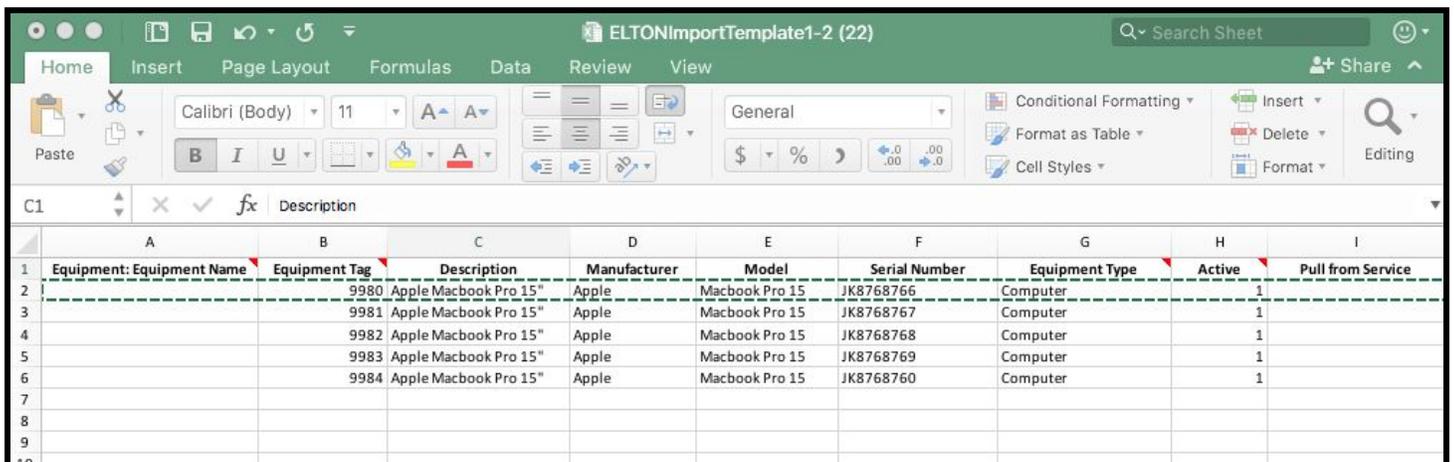
Once you have your data loaded into your spreadsheet, save that as a CSV file.
Start the Data Import Wizard. You have two choices for starting the wizard; 1) goto the Equipment tab and click the Import button, 2) goto Setup > Data > Data Import Wizard. As it saves steps below we have used option 1.
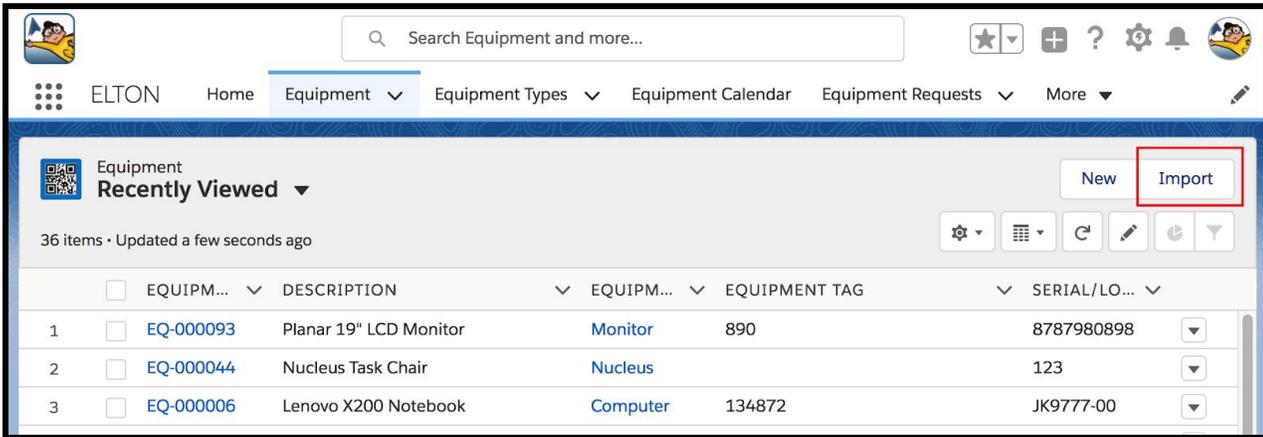
When the Data Import Wizard opens you will select the following for each pane;

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.
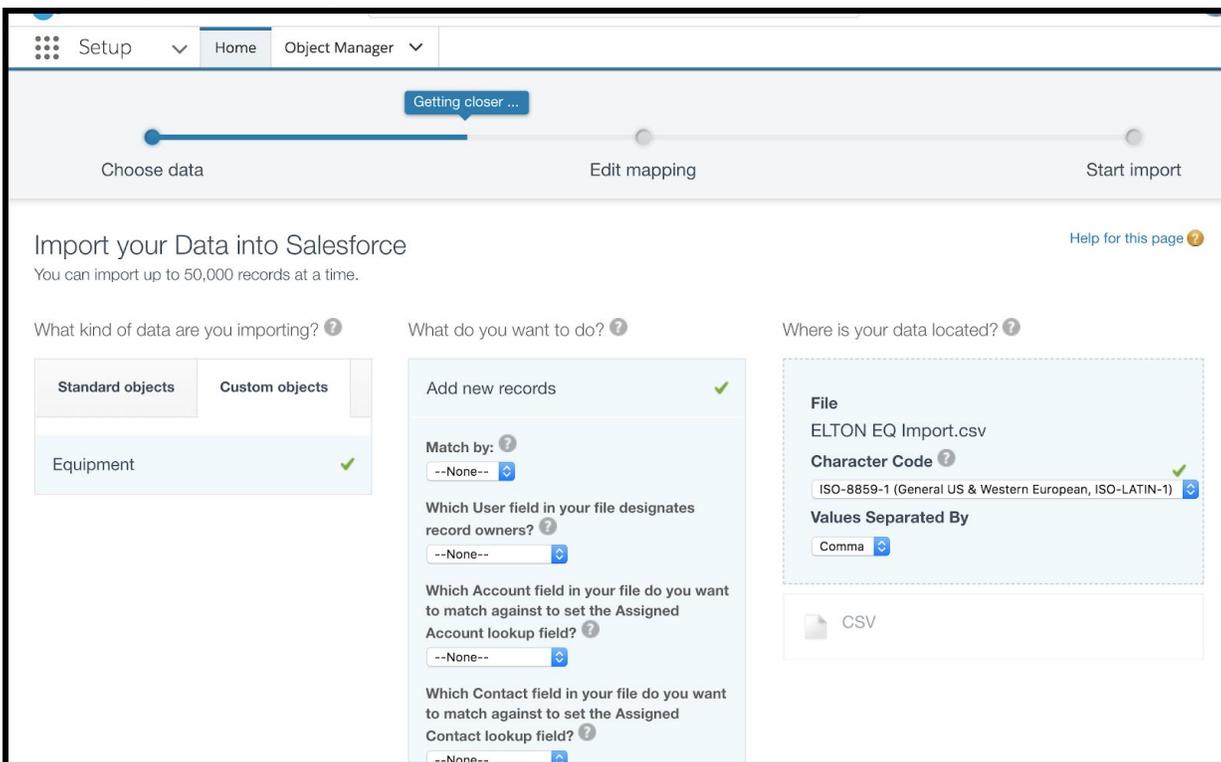
Click Next

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.

Click Next

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

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	005o0000000JGvy
3	EQ-000096	a0K1J00000Ez3MG	Apple Macbook Pro 15"	User	2018-03-29	005o0000000JGvy
4	EQ-000097	a0K1J00000Ez3MH	Apple Macbook Pro 15"	User	2018-03-29	005o0000000JGvy
5	EQ-000098	a0K1J00000Ez3MI	Apple Macbook Pro 15"	User	2018-03-29	005o0000000JGvy
6	EQ-000094	a0K1J00000Ez3ME	Apple Macbook Pro 15"	User	2018-03-29	005o0000000JGvy
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.
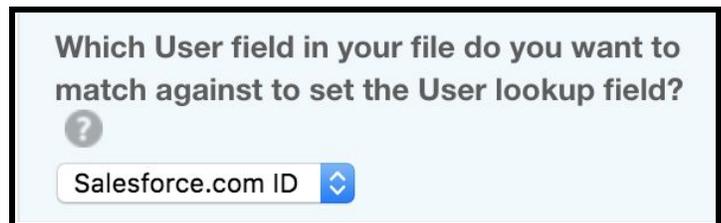
Which User field in your file do you want to match against to set the User lookup field? ❓

Salesforce.com ID ⇕

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)

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.

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 ↕

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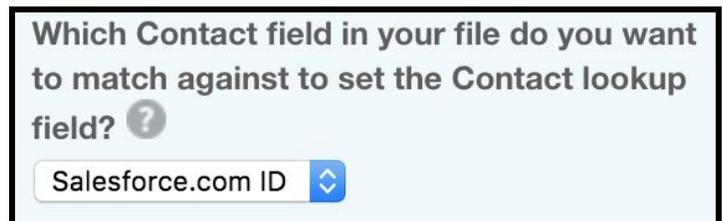
In this case I select Salesforce.com ID to find the Contact.

Where is your data located?

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

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)

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.