Importing Into the AssetCloud Database

Scott Leonard - 2021-01-19 - in AssetCloud

For the full procedure, in the AssetCloud Help, go to Home / Web Operation / Administration / Import Data.

AssetCloud's import page allows you to download import templates one at a time. Download a full zipped set of import templates here:
https://dl.waspbarcode.com/kb/ac/AssetCloud-Import-Templates-20210119.zip

Note for Basic edition users: Only one Site is allowed, so there is not an import step for sites.

If desired, Wasp offers a paid data import service.

Importing tips

- Importing is a multistep process; some later steps rely on certain prerequisite data imported/entered in earlier steps. The import templates are numbered in the proper order.

- It is not necessary to perform every import step that is available.

- Each import step must be done with its own CSV file; the process will not work using a single master CSV file.

- It isn't strictly necessary to perform an import at each step; alternately you can manually enter data for one or more steps (such as when there are only a few entries to be made).

- When you do perform an import step, the prerequisite field values must already be in the database; if not, you'll receive errors. For example, if you start with a later import step like Assets, the prerequisite Asset Types are not in the database, so you'll receive the error "invalid Asset Type".

- It is possible to update existing Employees and Customers (or Staff and Students for the .EDU edition) via the import process. On the import page, when selecting the Form Name of 5-Customer or 7-Employee, a checkbox appears "Only update existing records". However, other lists are not updateable via import; if attempted, there will be errors.

- In the Map Columns section, an asterisk * after a field name indicates it is required.

- If you are using Multi-Quantity Assets, the template file 15 InventoryAsset.csv gives the form for the Asset information. Asset Tag and Asset Type should be the same for each asset. Template 16 AssetAdd.csv is the file that will include the quantities for your MultiQuantity assets.

Complete List of importable Asset fields (as of April 4, 2017)

Asset Tag
Asset Description
Asset Type
Description
Site

Location

Department Code

Serial Number

Condition

Manufacturer

Model

Check Out Length

Check Out Lead Time

Vendor Number

Salvage Value

Depreciation Begin Date

Depreciate Asset

Purchase Order

Purchase Date

Purchase Cost

Related Pages

- [AssetCloud: How to migrate from MobileAsset?](#)