

4.27 Importing Equipment

Introduction

If you would like to import new equipment data into RMA, you can do so using our import routine. This is particularly helpful if you are buying hundreds of pieces of equipment at a time and receive data from your supplier in a spreadsheet or another database.

Overview

The equipment import process is simple and can be used by any company with equipment entered in a spreadsheet file. Here are the steps that will need to be followed during this process:

1. Modify the spreadsheet file into a format that can be imported into RMA.
2. Import the information from within the *Equipment Import* screen under the *File > Import* menu in RMA.

Each step of this process is covered within the remainder of this document.

File Format

In order to successfully import the equipment information into RMA you must first properly format your Excel spreadsheet file. This section will guide you through the formatting process.

Available Fields for Import

The following table includes all of the required field headings (*Description*) and designates whether or not data is required or optional.

NOTE: Each field heading is required in the order listed within your spreadsheet file. *Optional* fields can remain empty if desired.

Description	Bytes	Type	Comments
Equipment Serial No (Eq_id)	16	C (Character)	Letters or Numbers

Description	Bytes	Type	Comments
			<i>Required</i>
Equipment Branch (branch_id)	4	C	Must match RMA <i>Required</i>
Equipment Type (eq_type)	5	C	Must match RMA <i>Required</i>
Equipment Style (eq_style)	3	C	Must match RMA <i>Required</i>
Purchase Date (eq_prchdat)	12/31/2005	D (Date)	Use Standard Date format <i>Optional</i>
Manufacturer (eq_prchloc)	2	C	Name of Vendor or Manufacturer <i>Optional</i>
Purchase Price (eq_prchprc)	999,999,999.99	N (Number)	Cost from Vendor <i>Optional</i>
Equipment Financed (eq_finance)	True or False	L (Logical)	Equipment Finance: Yes or No <i>Required</i>
Rental Product Charge Code (prod_id)	5	C	Must be a valid rental product code <i>Required</i>
Equipment Period Code (eq_percode)	1	C	Default Rent Payment frequency: M=Monthly <i>Required</i>
Rent Rate for Period (per_rate)	999,999,999.99	N	Default Rent rate per Month, etc. <i>Optional</i>
Statement Billed (eq_mobill)	True or False	L	Equipment Statement billed: Yes or No <i>Required</i>
Alternate Equipment ID (Eq_id2)	16	C (Character)	Letters or Numbers <i>Optional</i>

Export File Example

Here is an example of what a properly formatted file would resemble prior to import into RMA:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	eq_id	branch_id	eq_type	eq_style	eq_prchdat	eq_prchloc	eq_prchpsc	eq_finance	prod_id	eq_percode	per_rate	eq_mobill	eq_id2
2	TEST011513	'0001	'01	'001	12/31/2013	'00		250 F		525 M		5 T	123456

This example displays the 13 required field headings. Some cells within each field heading, such as 'Branch_ID', may need to be formatted as text to preserve any preceding zeroes (i.e., 0001). In order to ensure that the text formatting is not modified when you save the file, add an apostrophe before the preceding zeroes (i.e., '0001) within the cell. When you are ready to save your file you will need to save it as .XLS (95-97).

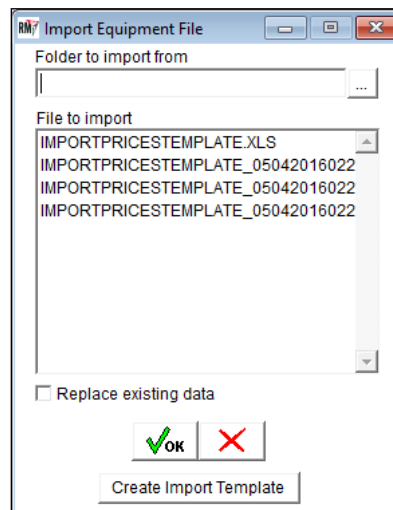
NOTE: A properly formatted template file for import can be generated by clicking on the 'Create Import Template' key within the *Import Equipment* screen (covered in the next section). Additionally, an example file with sample data can be found at www.ARS247.com under the *Supplemental Document* page for *Chapter 4.27*.

Equipment Import

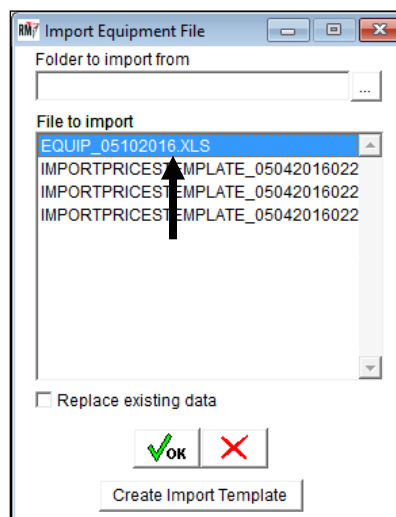
After you have properly formatted your spreadsheet file, you are now ready to import the information into RMA.

NOTE: It is recommended that you save your file within the RMA root folder so that it is automatically displayed when you enter the screen below. Additionally, RMA will automatically delete the file if it is successfully imported – make a copy of the file in a separate directory if you would like to retain it for your records.

1. Navigate to *File > Import > Equipment*.

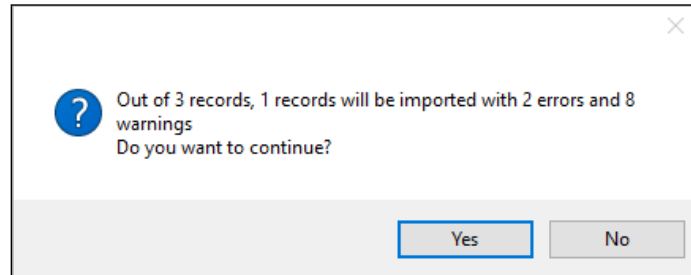


2. Click on the equipment spreadsheet file to import, or select the *Browse* key under 'Folder to Import From' (and double-click on your file) and click **OK**:



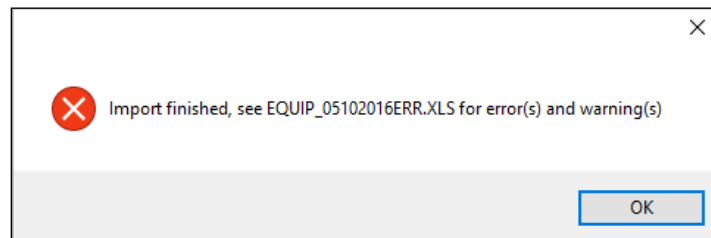
NOTE: Select 'Replace Existing Data' only if you would like to replace all existing pieces of equipment in the system – generally NOT recommended.

- A confirmation screen will be displayed that provides you with the total number of valid serial numbers that will be imported. Click **Yes** or **No** to continue.

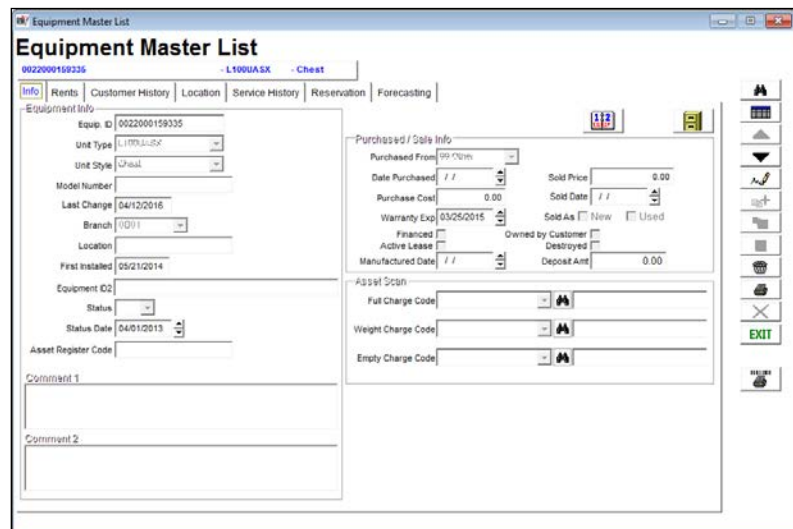


NOTE: If errors or warning are being reported you will need to review the results report or click 'No' and ensure that the spreadsheet has the correct information. Refer to 'Errors or Warnings' covered in the next section if you encounter any problems.

- The 'Import Finished' screen will be displayed once the process is complete. Click **OK** to continue.



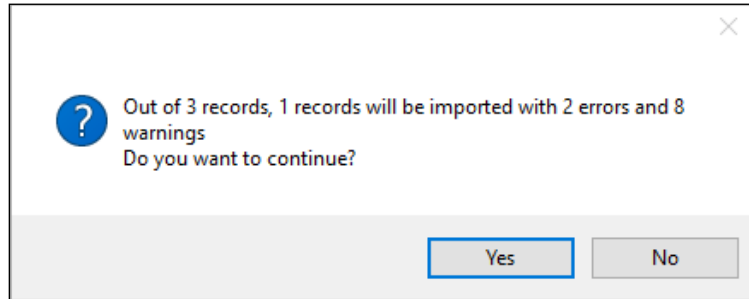
- The new pieces of equipment imported can now be viewed from within the *Equipment Master List*:



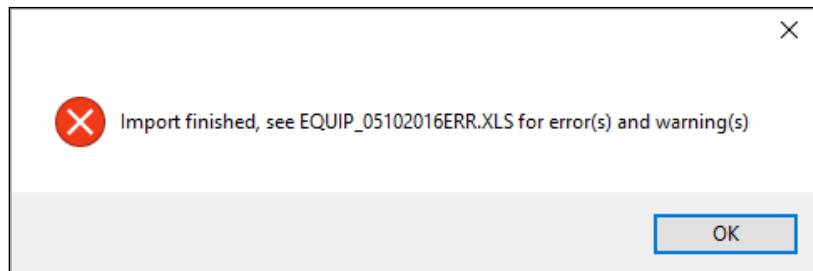
The equipment import process is now complete.

Errors and Warnings during Import

If you encounter any errors or warning during the import such as the message below:



Clicking 'Yes' to the message will import the valid records and provide you with a report that lists any problems encountered during the import process:



The system will create an error report and place it in the root folder of RMA. Simply navigate to the file and open it:

Name	Date modified	Type	Size
EQ_STYLE.IDX	3/15/2016 9:17 AM	IDX File	1 KB
EQUIP_05102016ERR.XLS	5/10/2016 2:05 PM	Microsoft Office E...	3 KB
eSELECTplus_dotNet_API.dll	12/14/2015 10:57 ...	Application extens...	72 KB
eSELECTplus_dotNet_API-US.dll	12/21/2015 1:02 PM	Application extens...	108 KB
EWSExec.exe	10/26/2015 11:18 ...	Application	9 KB

In the following case, a piece of equipment could not be imported because the serial number already existed within RMA:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
eq_id	branch_id	eq_type	eq_style	eq_prohdat	eq_prohloc	eq_prohprc	eq_finance	prod_id	eq_percode	per_rate	eq_mobill	eq_id2	imp_err	imp_warn	notes1
TEST011570	0001	01	001	31-Dec-13	08		250	FALSE	525	M	5	TRUE	"TEST011570" already exists		

At this point you would likely hand key in the piece of equipment with an alternate serial number. The steps taken to resolve these types of issues will vary based on the problems encountered.

Summary

Importing equipment will save you countless hours of time spent hand keying information into RMA. By following this formatting guide, you can easily update your *Equipment Master List* by importing the data effortlessly. Please contact the technical support department if you have any questions on using this feature.

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