

Protean Software

Equipment Import Notes

Equipment Import



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Equipment Import



Protean Versions

This document describes the import functionality of equipment records from Protean 7.3.4482 to Current Latest Release

Description

This import template is used to **create** equipment records. If makes and models are added that do not exist, the import will also **create** the makes and models.

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Fields on the Import - expected number of columns = 36:

Column	Field Name	Mandatory	Requirements	Notes
A	Equip	Always	Equipment Number Must Be Unique Max 50 Characters Alpha Numeric	Equipment number in Protean, used to track and trace a unique identifier
B	Make	Always	Pre-Existing Make from system>Equipment>Makes & Models. Must already exist Max 30 Characters	Equipment Make, must already exist to import
C	Model	Always	Pre-Existing Model from system>Equipment>Makes & Models. Must Already Exist Max 30 Characters	Equipment Model, must already exist to import
D	EquipCat	Always	Pre-Existing Equipment Category. System>Equipment>Types Max 30 Character	NOTE** Each make and model can only be linked to a single category type and sub type, you cannot have the same make and model with different category, type and sub type, a new make and model would be required.
E	EquipType	Always	Pre-Existing Equipment Type. System>Equipment>Types Max 30 Character	NOTE** Each make and model can only be linked to a single category type and sub type, you cannot have the same make and model with different category, type and sub type, a new make and model would be required.
F	EquipSubType	Always	Pre-Existing Equipment Sub Type. System>Equipment>Types Max 30 Character	NOTE** Each make and model can only be linked to a single category type and sub type, you cannot have the same make and model with different category, type and sub type, a new make and model would be required.

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G	SerialNo	No	Equipment Serial Number or Mark Text Field (Numbers & Letters) Max 255 Characters	Enter the serial number or ID of the piece of equipment.
H	SecondHand	Always	Mandatory Field, N = No, Y = Yes	Populates the second hand flag against the equipment record.
I	SiteAlpha	Always	Mandatory field Max 17 Characters	Needs to match the Alpha code of the site where the piece of equipment is. Site/Customer record must already exist.
J	Depot	Always	Mandatory Field Text field, must match the name of the relevant depot and already exist System>General>More>Depots, Stores & Work Areas	If multi depot, use the relevant depot name, or if unchanged and 1 depot this is usually set to 'main depot'
K	SiteEquipId	No	Text Field Max 50 Characters	Will populate the customer's equipment number field in an equipment record.
L	Status	Always	Text Field Status used must be either Customers Own, Entry, Cross Hire, Sold, Rental or Customer Retired	IMPORTANT. Only a few statuses are allowed here due to the way the system processes data for hire etc.
M	MeterReadDate	No	Date Field DD/MM/YYYY	NOTE** Will not populate if meter reading left blank
N	MeterReading	No	Numeric Field Max 8 Characters	NOTE** Will not populate if meter read date is left blank
O	Condition	No	G = Green, Y = Yellow, R = Red	Used to flag the equipment record condition section with the relevant colour
P	PurchaseDate	No	Date Field DD/MM/YYYY	Will populate the purchase date field of the equipment record in the other tab.

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Q	PurchaseMeterRead	No	Numeric Field Max 8 Characters	Will record the meter reading at date of purchase and populate relevant field in the equipment other tab
R	PurchaseWarrantyLength	No	Numeric Field In Months	Will populate the purchase warranty field in months in the equipment other tab
S	PurchaseWarrantyLengthMeter	No	Numeric Field Max 8 Characters	Will populate the other tab, purchase warranty length field in meter units
T	PurchaseWarrantyStart	No	Date Field DD/MM/YYYY	Will populate the purchase warranty start date field in the equipment other tab. NOTE** If no start date is entered but warranty length or warranty meter are populated, they will still import but warn you in the system the warranty fields are incomplete
U	SoldDate	No	Date Field DD/MM/YYYY	Will populate the sold date field in equipment other tab
V	SaleMeterRead	No	Numeric Field Max 8 Characters	Will populate the meter reading on delivery field in equipment other tab (must have a sold date relevant to populate)
W	SalesWarrantyLength	No	Numeric Field In Months	Will populate the other tab, sales warranty length field in months NOTE** Will import but show warnings inside Protean if no start date entered

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X	SalesWarrantyLengthMeter	No	Numeric Field Max 8 Characters	Will populate the other tab, sales warranty length field in meter units NOTE** Will import but show warnings inside Protean if no start date entered
Y	SalesWarrantyStart	No	Date Field DD/MM/YYYY	Will populate the sales warranty start date field in the equipment other tab. NOTE** If no start date is entered but warranty length or warranty meter are populated, they will still import but warn you in the system the warranty fields are incomplete
Z	UserRef1Equip	No	Text Field, Must exist in user reference for equipment ref list for user reference 1 System>General>More>User References> Equipment	Populates user ref 1 dropdown list in general tab of the equipment record, must use 1 of the drop down options already set up in the system. If not already set, the system will still import with no warning but the field will remain blank in Protean
AA	UserRef2Equip	No	Text Field Max 50 Characters	Free text 50 characters max, will populate the user reference 2 field in the general tab of the equipment record
AB	ContactTitle	No	Text Field Max 15 Characters	Must Link to an existing contact along with names etc
AC	ContactFirstName	No	Text Field Max 50 Characters	Must Link to an existing contact along with names etc

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AD	ContactLastName	No	Text Field Max 50 Characters	Must Link to an existing contact along with names etc
AE	ContactPhone	No	Text Field Max 50 Characters	Must Link to an existing contact along with names etc
AF	ContactEmail	No	Text Field Max 50 Characters	Must Link to an existing contact along with names etc
AG	MakeModelTaxCode	No	Text Field Must match an existing product tax code such as standard or exempt	If the make and model details are new, this will define the tax code against the new make and model, if left blank the default tax code is assumed
AH	WarningNotes	No	Text Field Max 255 Characters	Will add warning notes to the memo tab on the equipment record.
AI	Notes	No	Text Field Max 255 Characters	Will add internal notes to the memo tab on the equipment record.
AJ	Location	No	Text Field Max 255 Characters	NOTE** if no records have a location, and you are working with Excel ensure you follow the best practice guidelines to save including header rows to CSV before deleting the header row on the raw text file prior to import.

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How to import

1. File must be saved in CSV format.
 - a. File must not contain any header rows.
2. Navigate to file tab on Protean
3. Select Import Data
4. Use the import wizard
5. Select 'Parts Stock Levels' under the type of data dropdown
6. Find the CVS import file (as per step 1)
7. Hit Next to validate the data
 - a. If needed correct import file
8. If step (7) successful - Double check the data on screen
9. Hit next to import into Protean
 - a. If needed review any warning messages and either correct in Protean / Import file and revert to step (2) onwards
10. If successful choose to keep or delete the import file used

Best Practice

- If using Excel – do not double click to open a CSV File.
- Open Excel and use a data import from text to open any CSV
 - Select text formatting for any data including leading zeros
- Once ready, save in CSV format – including the header rows
- Review the saved CSV file in raw text format
- Remove the header row from the raw text CSV - save as another name with .csv formatting
- Run any major import in a practice environment before live
- Carry out a sample import of under 10 records before any larger import

Other Info

Regular scheduling of this import is possible via the Protean scheduler.

The same make and model cannot have variations of the category type and subtype.

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Further Assistance

Example CSV template available on support website

Please review import templates webinar - <https://support.proteansoftware.co.uk/knowledge-base/webinar-import-templates/>

Contact Protean Support

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Version Control

Version	Comments	User	Date	Approver
1.0	Original Document	Glen Barber	08/02/2019	MH
1.1	Additional notes on Make/Model	Glen Barber	01/03/2020	MH