Go to the FILE menu of your software and open the ADMIN help file – look for the information about imports and exports to familiarise yourself with the process, then:

- 1) Go to Setup / Fixed Assets / Fixed Asset Types and create any new asset type that is required (the asset type must exist in the software before you can use it on an import)
- 2) Go to Admin / Imports and create a new import routine for data type FIXED ASSET. It already contains the required fields in the right-hand window, add any others you may need, but the minimum required should be enough if the only thing you are changing is the type. Give this new routine a name and have the file type set to CSV, tick the box for the Use Column Headers option. Save it (it will show on the blue left-hand side list once this is done).

Imports X					
-** Create New Routine **-					
Routin	Routine Details				
Routine	e Data Type Fixed Asset 🔸 🗸	File Type			
Routine	Name My Import				
		⊖ TAB			
		Vise Column Headers			
Availat	ble Fields	Selected Fields			
CUSTO	M FIELD	Asset Code			
IGNORE	E	Asset Location			
Accourt	nting Acc Depn	Asset Type			
Accourt	nting Current Year Depn	Purchase Date			
Accourt	nting Current Year Depn Month				
Accourt	nting Depn Rate				
Accourt	nting Depn Type				
Asset 0	Code				
Asset 0	Group				
Asset L	Location				
Asset T	Гуре				
Departm	ment 🗸				
Add A	All	Remove All			

3) Go to Admin / Exports and create a new Export routine: select Data Type FIXED ASSET, Name the Routine and save as a CSV file type. Unlike the import routine, there are no preset required fields selected here. Select them from the left side window by double clicking the ones you need. IMPORTANT: select the fields in the same order they appear in the import routine above. SAVE the routine (but don't close the screen yet).

* Create New Routine **	💾 Save 💾 Edit 😫 Delete 🗊 Edit Parameters 💋 Cancel	
	Routine Details	
	Routine Data Type Fixed Asset	
	Routine Name My Export CSV	
	○ ТАВ	
	Available Fields Selected Fields	
	Accounting Acc Depp	
	Accounting	
	Accounting Current Veer Denn Month	
	Accounting Carrent real Deprimonal Associate	
	Asset Code	
	Asset Group	
	Asset Incetion	
	Asset Type	
	Department	
	Description	
	Finance Amount	

4) After Saving, click the EXPORT button (save to desktop or a folder that is easy to locate), and at the prompt asking if you exported file now, select NO. Now you can close the Exports screen.

Exports		×
** Create New Routine **	🔚 Save 💾 Edit 🙆 Delete 🗋 Edit Parameters 🥥 Cance	
My Export	Routine Details Routine Data Type Fixed Asset Routine Name My Export State CSV TAB	

- 5) The next step it to work on the exported file, please follow these instructions here Saving a CSV file with the correct data format.
- 6) Now the speadsheet is open, (delete the lines of assets you will not be changing), now is the time to replace the current type on the assets you want to update – please ensure to write the type DESCRIPTION exactly as it shows in Settings. SAVE and close the file ensuring you **save as CSV format**
- 7) Back in the software, and create a backup before importing the data.
- 8) Go to Admin / Imports and select the import routine that was created in step 2, then click the import button at the top and follow the prompts to find the CSV file you saved in step 6.

Imports		1	×
** Create New Routine **	🗏 Save 🚝 Edit 🚱 Delete 🔗 Car	ncel	
My Import	Routine Details		5
	Routine Data Type Fixed Asset	File Type]
	Routine Name My Import	XML CSV	
		ТАВ	
		Use Column Headers	

9) Once the import is done, check your data and make sure the result is what you expected – if not you will need to restore the backup you created in step 7.