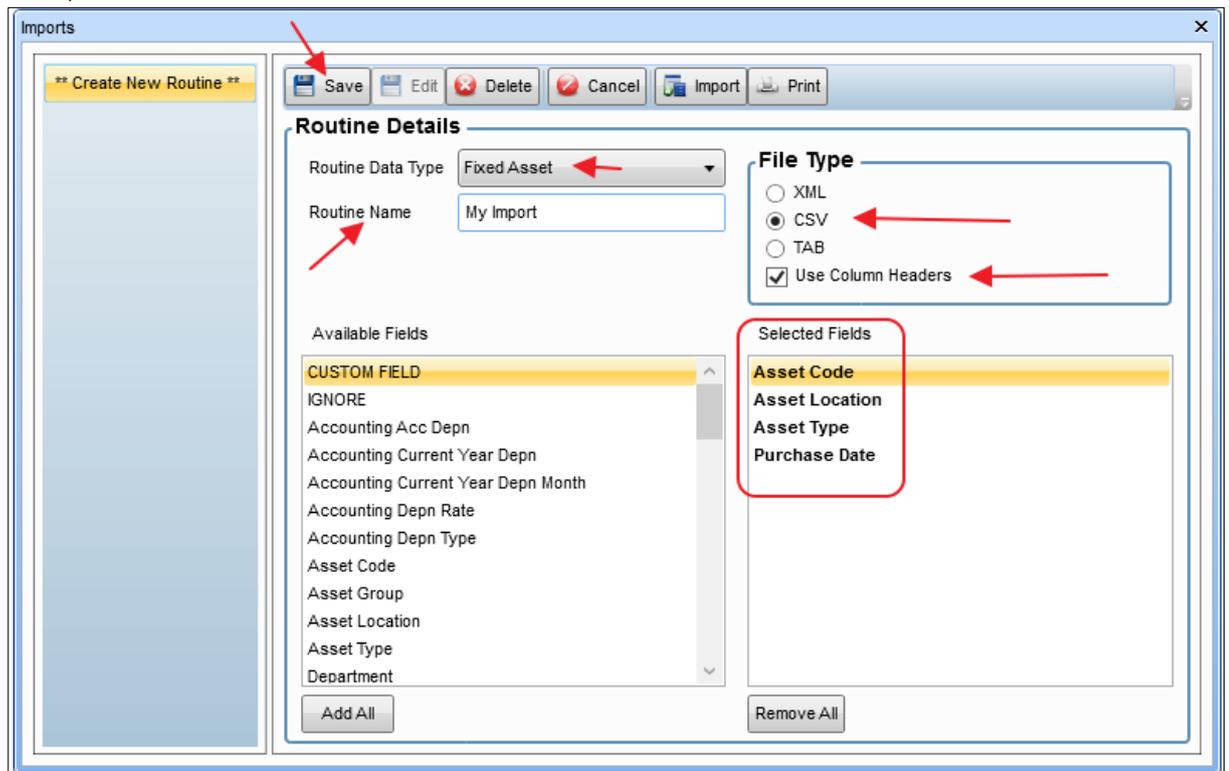
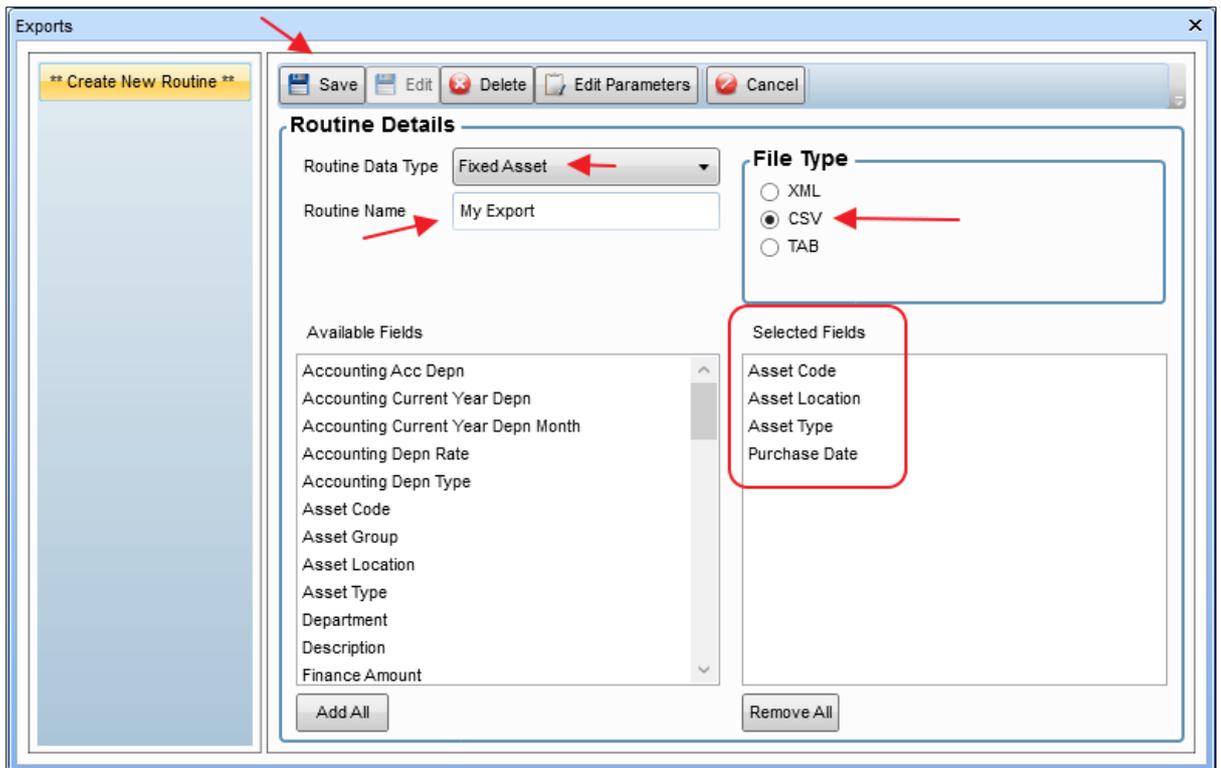


Go to the FILE menu of your software and open the ADMIN help file – look for the information about imports and exports to familiarise yourself with the process, then:

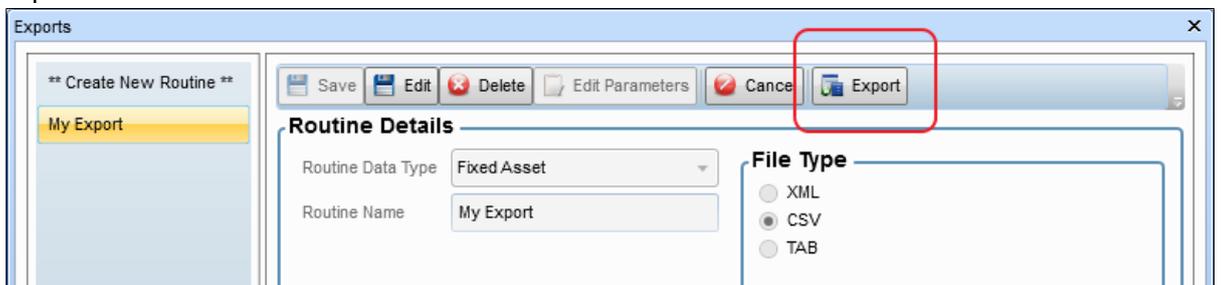
- 1) Go to Setup / Fixed Assets / Fixed Asset Types and create any new asset type that is required (the asset type must exist in the software before you can use it on an import)
- 2) Go to Admin / Imports and create a new import routine for data type FIXED ASSET. It already contains the required fields 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).



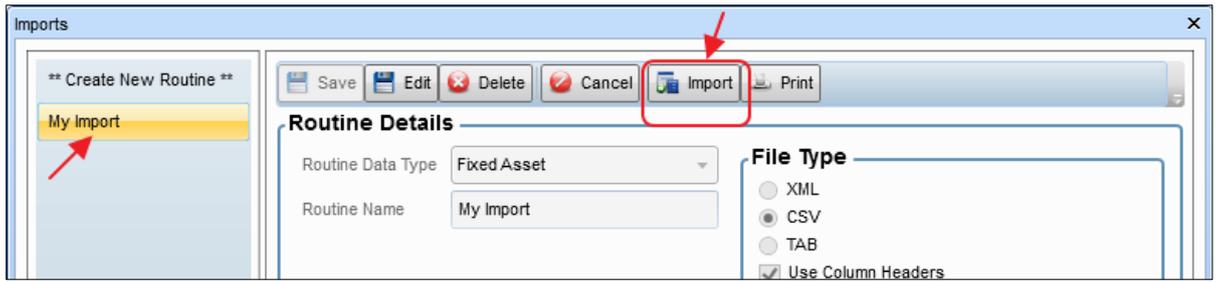
- 3) Go to Admin / Exports and create a new Export routine: select Data Type FIXED ASSET, Name the Routine and save as a CSV file type. Unlike the import routine, there are no pre-set required fields selected here. Select them from the left side window by double clicking the ones you need. **IMPORTANT:**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



- 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.



- 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 spreadsheet 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.



- 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.