Surplus Template

Use this template to add multiple assets to a Surplus Transfer by creating and uploading a csv file with your asset data. Follow the instructions below to create the import file.

I. Fill in the Template sheet which is the second tab in this workbook.

  1. All required fields are highlighted in light yellow. Each of these fields must have a value to successfully import assets.

    a.) Vehicle assets must also have the fields highlighted in **green** completed. A list of available values for each of these fields can be found in the vehicles tab of this workbook.

    b.) Trailer assets must also have the section highlighted in **blue** completed. All of the Trailer fields are free text fields.

  2. The Category and Condition values must match the list of available options. The available Categories and Conditions can be found in the 3rd and 4th tabs of this workbook.

  3. Please add the Serial Number for electronics and similar assets which have a serial number available. All Vehicles must have a VIN number.

II. Prepare your file for import.

  1. After all asset details have been added to the template, copy the data over to a new file and save this file as a comma delimited (csv) file. Ther are further instructions and screenshots regarding this process in the written documentation.

  2. Ensure the Header Row (top row containing the field names) has been removed from your file. Save the file using any name you would like and verify the file type is set to csv. The file is ready to import.

III. Import the Assets.

  1. Drag and drop your file into the File Upload grid within the Surplus transfer detail.

  2. Click the **Import Assets** button.

  3. The import will begin running. The screen will refresh and you will be notified if there are any errors with your file. If no errors occured, then the assets will display in the **Assets** region at the bottom of the Surplus Transfer Detail.

  4. If there are issues with your file, click on the number in the **Number Of Errors** column within the **Import Run Log**.

  5. Review the issues in the **Error Report** and update your file accordingly. Once all updates have been made, save the file and attempt the import again.