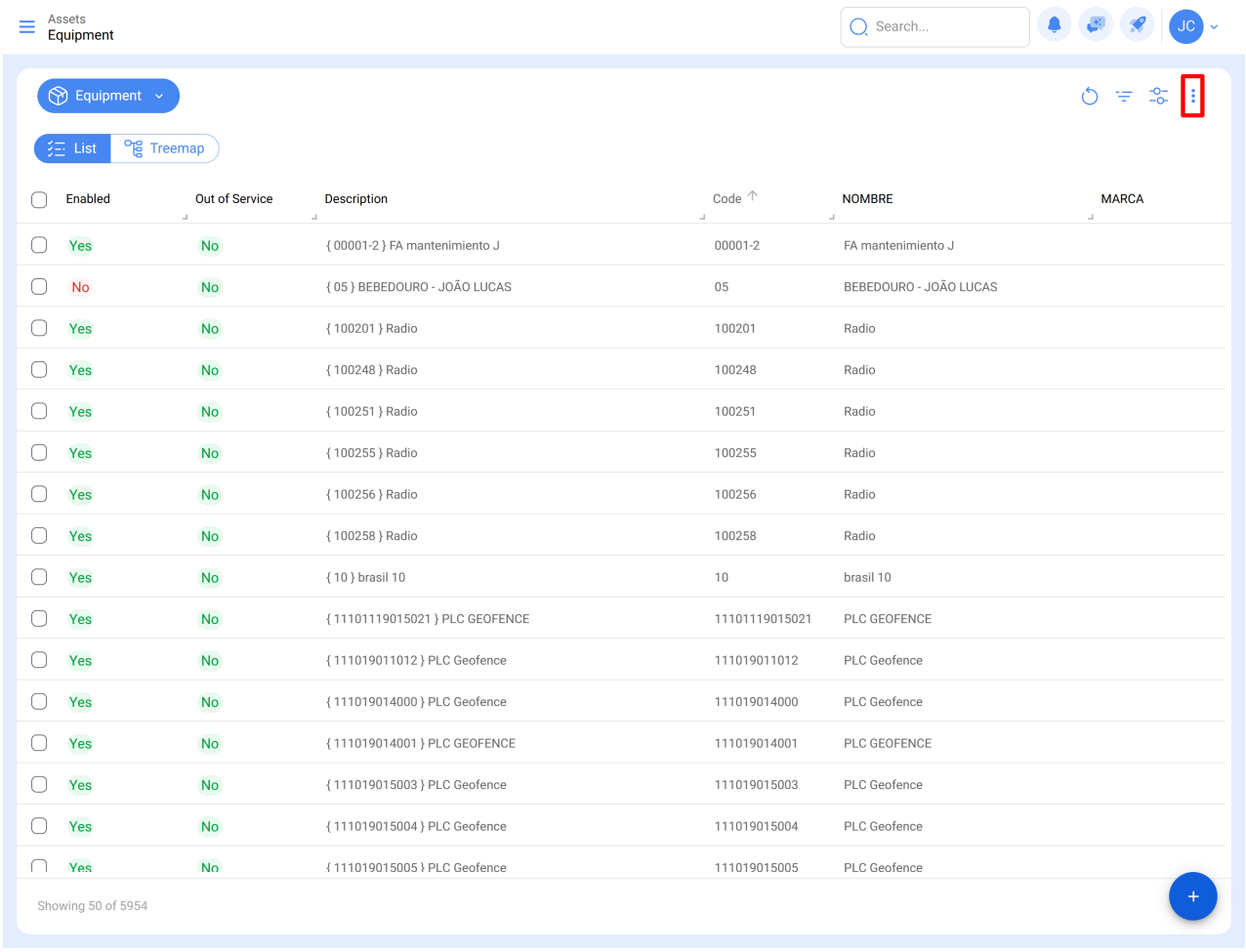
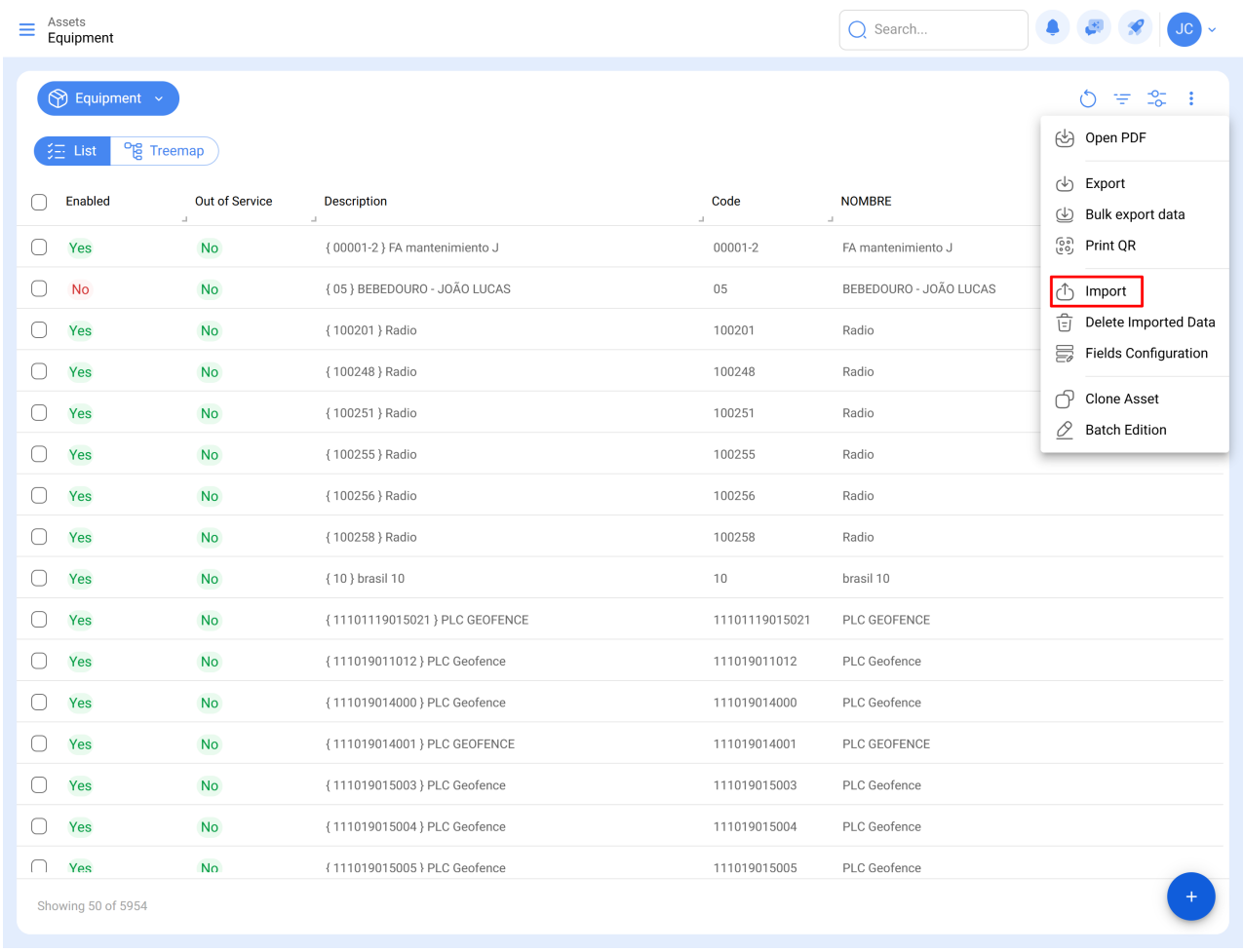
How to perform an import in the Catalog module?

help.fracttal.com/hc/change_language/en-us

To perform an import of a catalog (whether an asset, human resource, or third-party), simply go to the corresponding module and expand the additional options menu.



Then, click on the "Import" option so the system opens a window where you can drag or select the Excel file with the completed import spreadsheet.


Assets
Equipment
Search...
JC
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List
Treemap
Open PDF
Export
Bulk export data
Print QR
Import
Delete Imported Data
Fields Configuration
Clone Asset
Batch Edition
Enabled
Out of Service
Description
Code
NOMBRE
Yes No { 00001-2 } FA mantenimiento J 00001-2 FA mantenimiento J
No No { 05 } BEBEDOURO - JOÃO LUCAS 05 BEBEDOURO - JOÃO LUCAS
Yes No { 100201 } Radio 100201 Radio
Yes No { 100248 } Radio 100248 Radio
Yes No { 100251 } Radio 100251 Radio
Yes No { 100255 } Radio 100255 Radio
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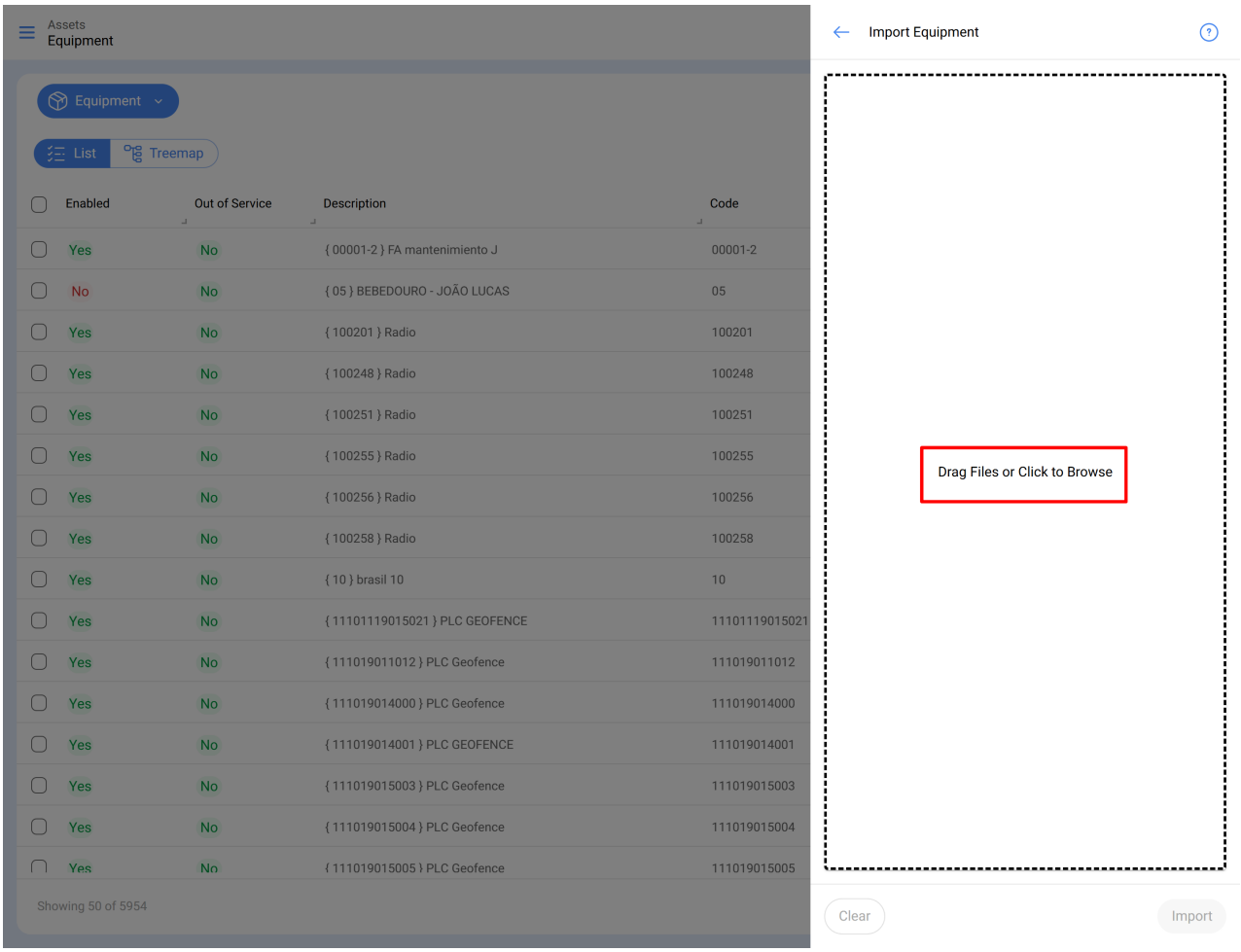
Showing 50 of 5954


Assets
Equipment
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List
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Description
Code
Yes No { 00001-2 } FA mantenimiento J 00001-2
No No { 05 } BEBEDOURO - JOÃO LUCAS 05
Yes No { 100201 } Radio 100201
Yes No { 100248 } Radio 100248
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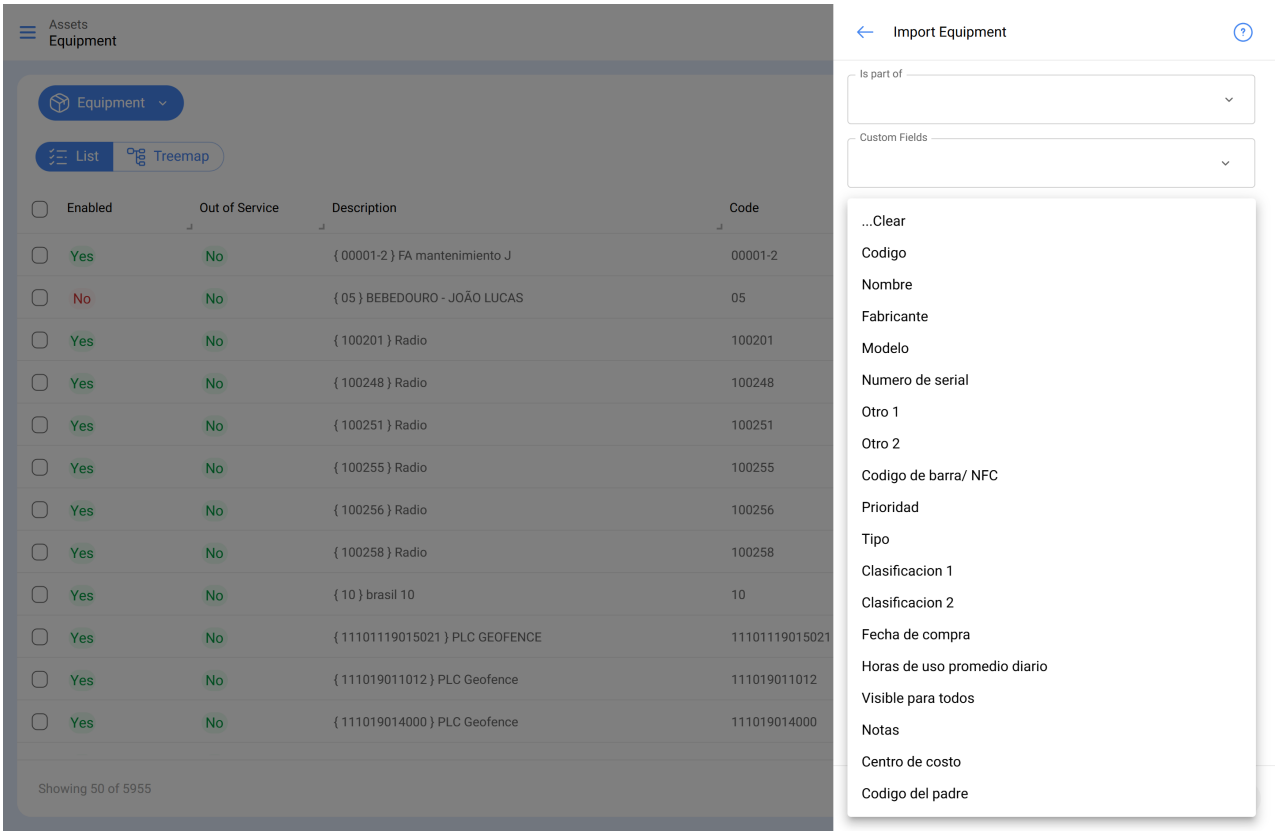
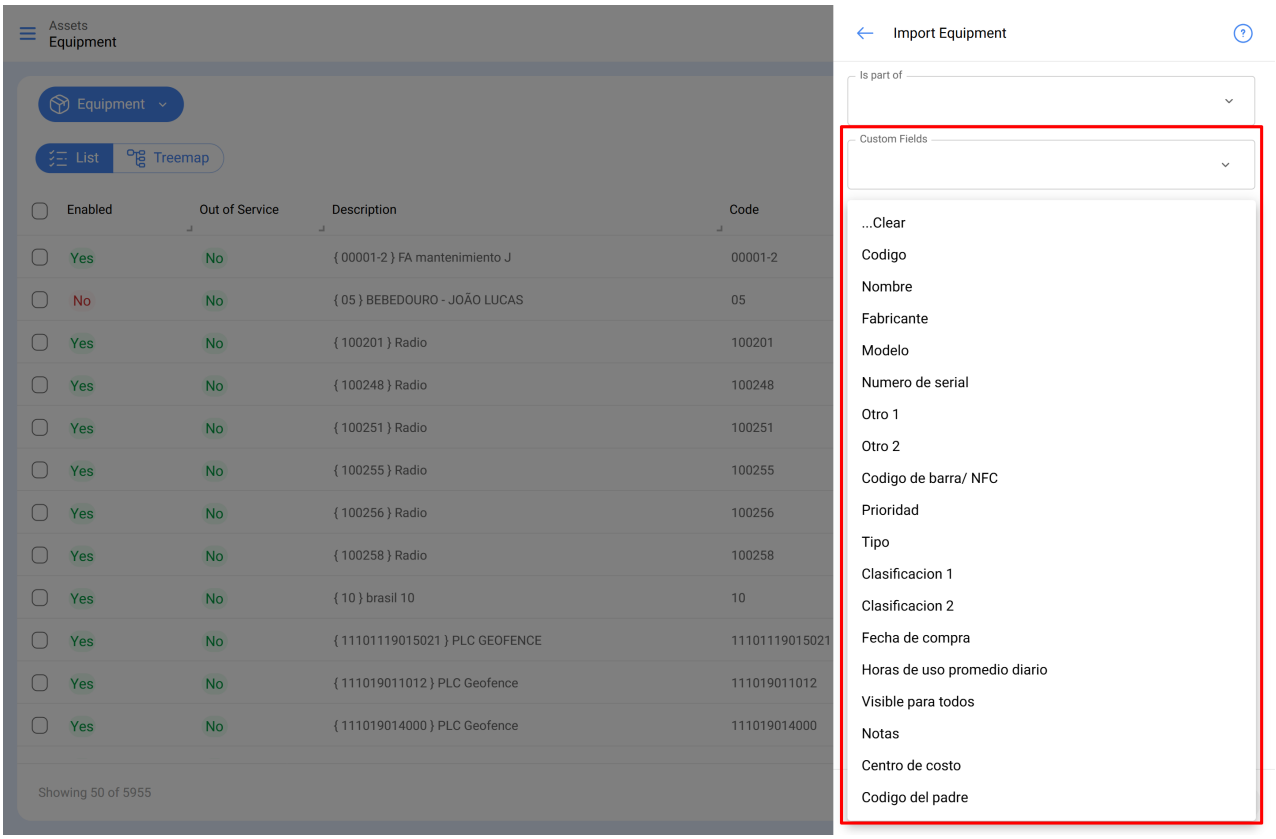
Showing 50 of 5954
Import Equipment
Drag Files or Click to Browse
Clear
Import

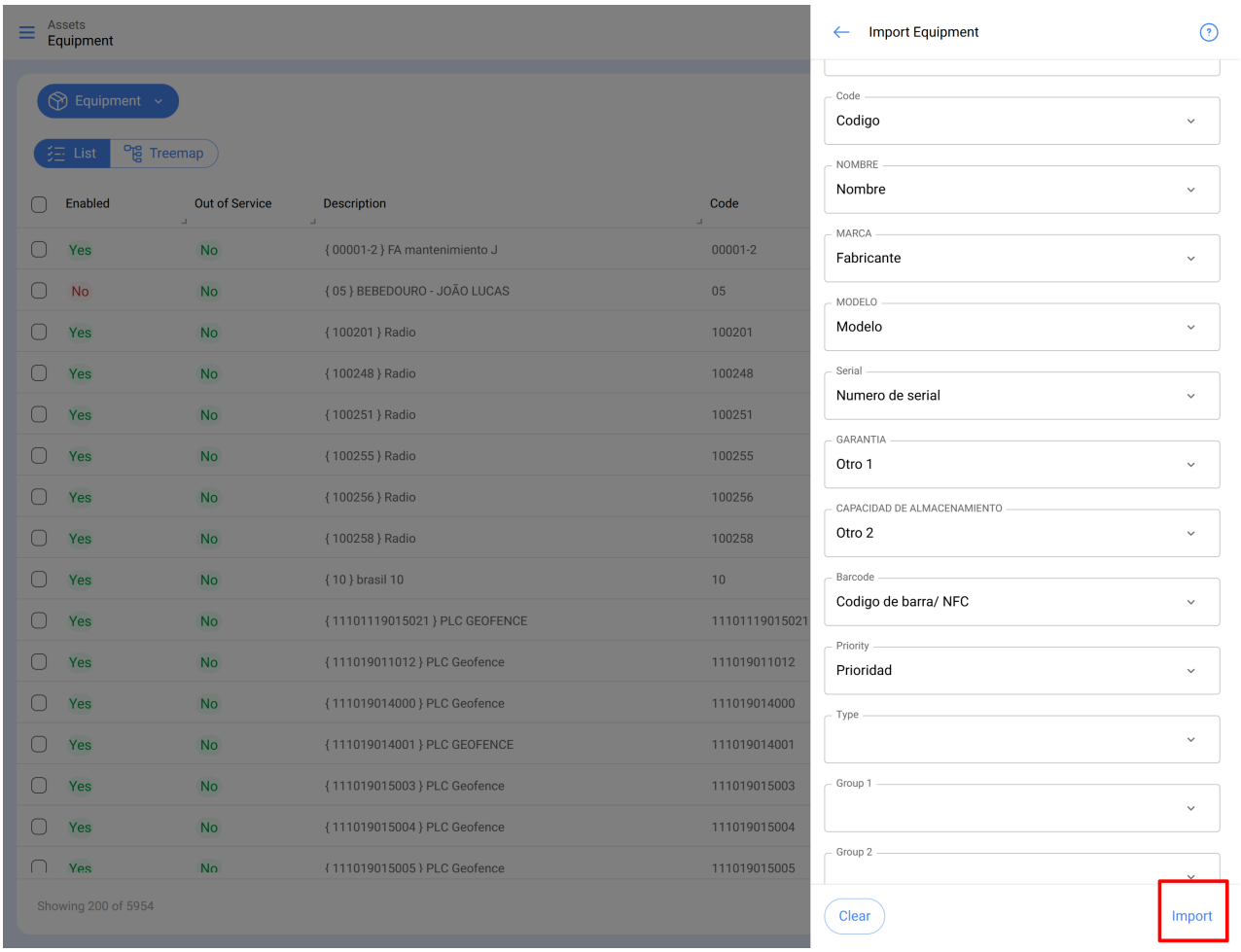
Once the file is uploaded, you need to match the header title of the columns in the spreadsheet with the text in each box corresponding to the descriptive fields within the platform.

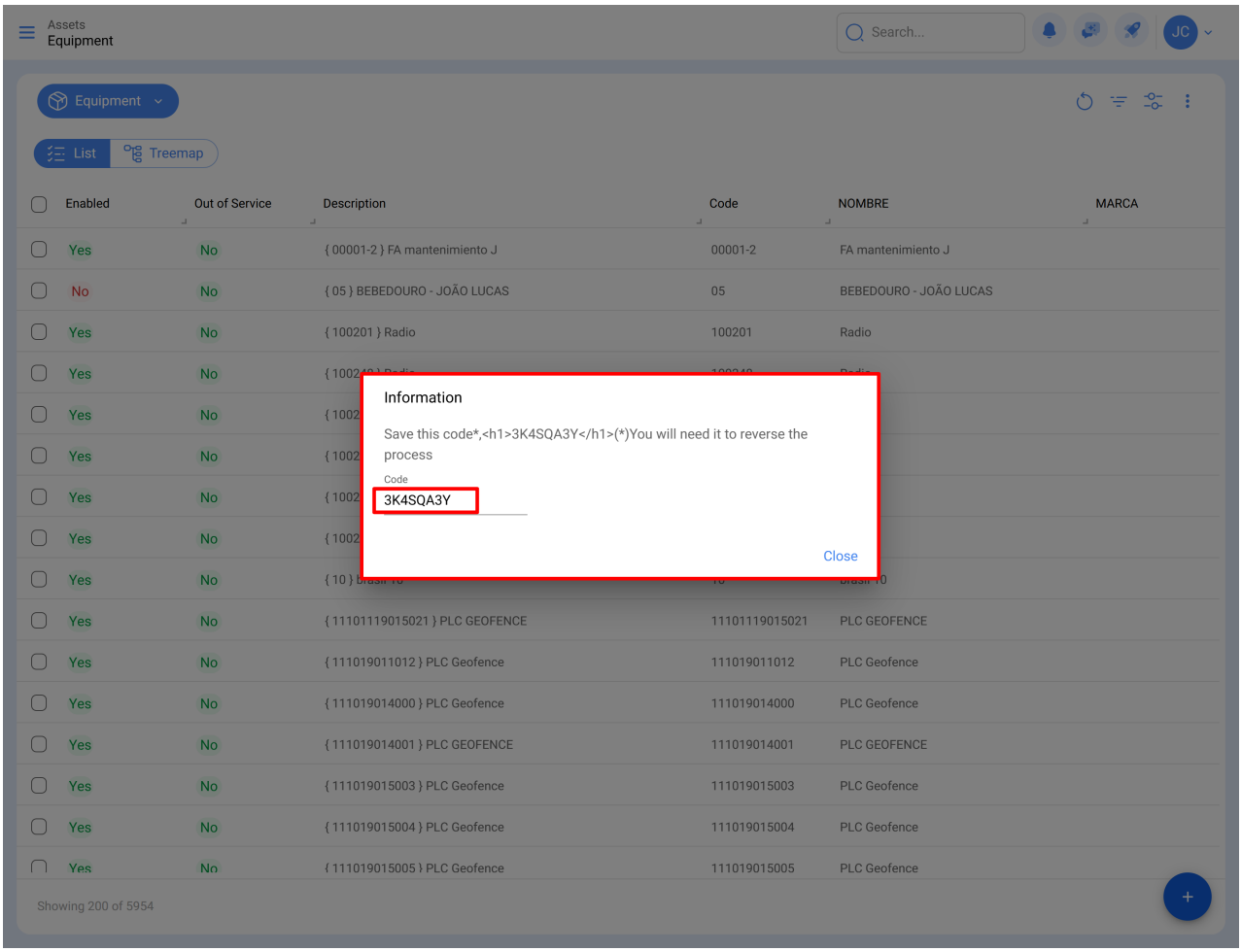




After linking all the columns, simply click on the "Import" option for the system to load the import spreadsheet. Once the import is completed, the system will automatically generate an import code that can be used if, for any reason, you wish to delete the imported

information (this code will be displayed on screen and sent to the email of the user who performed the import).





Note: Like Facilities, bulk imports for Assets, Human Resources and Third-Party modules are carried out in a similar way as described in the steps above.

Import Considerations

Imports are made through Excel import sheets, which should not have formulas, hidden columns, or special characters (this can cause problems when loading the information into the system).

Users must be clear about the fields that they will use in the system to record the information associated with their assets, since these descriptive fields will be used as column headings in the spreadsheets which must later coincide with the Fracttal columns (of the views lists).

In case you do not need to use or complete certain fields (which are used in the platform to import information), it will not be necessary to add them as columns in the import sheet since when importing, these empty fields will simply not appear.

The system does not permit duplicate asset codes.

Imports in the warehouse module only apply to the "stocks" tab.

The imports in the asset, human resources, and third-party modules only apply to the information contained in the "general" tab.