



Import/add asset items from Finance

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Add/import asset items from Finance

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Use the file that you previously created in Finance on the Extract to Asset Management page to import asset items. Or, manually add asset items as needed.

Click **Import** to begin the import process.

- Click **Choose File** to select the file that you created from Finance.
- Click **Submit** to import the selected file. A list of assets that can be moved from Finance is displayed.
- Select the asset to extract from Finance.
- Enter the **Date Acquired to Save As** and click **OK**. The item is now displayed on the Transaction Records tab.

Click **Save** to save the item. Repeat this process to continue importing the additional asset items as only one record can be imported at a time.



For each “C” item record that is \$5,000 and over, you must complete the required fields on the Inventory Records, Depreciation Distribution Records, and Book Record tabs. You can either import all items and then return to each record and complete the fields on the various tabs **OR** complete the fields on the various tabs as you are importing each record. Either way, be sure to click **Save** after entering all data for a record to ensure that the record is updated.

If you have any inventory records that were not imported, you can manually enter those items using documented procedures so that you will have a complete inventory for closing the year.

- All “C” items must have a Transaction, Inventory, Depr Distribution, and Book Record entered.
- All “I” items must have the Transaction and Inventory tabs completed only.



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