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## CUSTOMER GUIDE: Importing Data

### Introduction

**MENU: File | Database | Utilities | Import Text Data...**

#### **IMPORTANT**

Until you have become familiar with the import process, and how to create your import file(s), we recommend that you make a copy of your database before running an import, and use the copy for import testing purposes.

Another approach is to create a new database for import test purposes, so that you can experiment and become familiar with this process. The import processor can read many thousands of records in a matter of seconds, and can bring in bad/incorrect data if the import data is not correct.

Do not import the same data twice. In some cases, the software will accept multiple imports of the same data as long the data is formatted correctly, and it doesn't violate any database rules.

If you need technical support, please write us at [support@fleetmate.com](mailto:support@fleetmate.com) and attach the import file you are having difficulty with. We'll be glad to assist you.

### Reserved System Fields

The following six (6) fields are system generated fields, and are found in many tables in your FLEETMATE database. Do not include these fields in your import files.

- TX\_YRMON
- TX\_MONNAME
- DT\_CREATED
- TX\_CREATEDBY
- DT\_LASTEDIT
- TX\_EDITEDBY

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## CUSTOMER GUIDE: Importing Data

### Valid Tables

FLEETMATE enables you to import delimited text data into 17 primary tables in your database.

The first row in your import file (except for special cases) will contain database field/column names. The Data Dictionary that comes with FLEETMATE will provide these field names for you.

Each import file that you create must specify the table name as the first column in each row of data, followed by the actual data value(s) you plan to import. In the pages that follow, we'll specify the table name to use.

A specific format is required when creating your import file(s). If you have text data available, this feature is intended to save you some time initially setting-up your database, minimizing much of the manual typing that would otherwise be required. Tables that you may import data into are:

- Customer
- Vendor
- Personnel
- Inventory
- Vehicle
- Payment
- Maintenance (*i.e., Work Orders*)
- Parts
- MaintTasks (*i.e., Labor Lines*)
- Fuel
- Route
- Job
- Inventory Receiving Header
- Inventory Receiving Detail
- Templates
- Template Tasks
- Tire Management

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## CUSTOMER GUIDE: Importing Data

### Delimited Text Data

The import process supports text data using virtually any type of field delimiter. A common format is comma-delimited (often referred to as CSV for **C**omma **S**eparated **V**alues).

If using a delimiter other than a comma, be certain to specify the correct delimiter character on the **Import Text Data** dialog prior to attempting an import.

Be certain that your data values do not contain the delimiter character. As an example, if a city, state, and zip code value is "NEW YORK, NY 10001", you cannot use a comma as the delimiter. This is because a comma appears *within* the data value. You will need to remove the comma from the data value, or choose a different delimiter.

Once you import your data, you will need to access the imported records through the FLEETMATE program to make whatever adjustments may be necessary. You will also need to make certain that your data is 100% accurate and complete following an import.

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## CUSTOMER GUIDE: Importing Data

### Data Formatting Notes

Import records must not span multiple physical lines in your import file. The rule is one record per row.

Numeric data in an import file should contain numeric values only. This means numerals 0-9 and a decimal stop only. As an example, a dollar value of "\$12,345.67" will need to be entered as "12345.67". Do not include commas or currency symbols when specifying values that represent currency. Another invalid example is "8,765,432.1", which must be entered as "8765432.1"

When entering date values in an import file, format your date values to match the format defined in Regional Settings in Windows Control Panel. "01012012" representing Jan 1, 2012 is invalid. This date must be entered in a traditional format such as "01-01-2020" or "01/01/2020".

Avoid the use of punctuation characters like quotation mark, apostrophe, semicolon, percent, and hash mark. It will be best to stick with alphabetic characters, numerals, spaces, and a period.

Character-case is up to you. However, if you prefer that your data always appear using UPPER CASE characters, use the UPPER-CASE option on the **Import Text Data** dialog.

When supplying numeric and "flag" (true/false) values, numeral one (1) or a zero (0) is expected. Do not use the alphabetic character "O" (oh) to indicate a numeric value of zero.

### Importing Template Tasks

If NO\_PERIODTYPE is undefined in your import data, a time based recurring task that is imported will default to *Days*. If you intend to import the time interval in Months, set NO\_PERIODTYPE to -1.

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**CUSTOMER GUIDE: Importing Data**

## Miscellaneous Requirements and Some Suggestions

Import records must not span multiple physical lines in your import file. The Records in an import file are processed sequentially, from top to bottom.

Use care to make certain that record dependencies are addressed. As an example, if you are importing a work order, a VIN/SN for the asset must already exist in your database. A work order cannot exist, unless it is related to an asset record.

For unknown **Text** values, you should enter text such as "UNK" or "NA." This will make it easier to identify any field alignment problems in your import file.

For unknown **Date** values, the field must remain completely **blank**.

For unknown **Numeric** or **Currency** values, enter a **zero**.

Note that the first column of every record must contain the Table Name so that the import processor understands how to parse and process the data fields that follow the first column.

## CUSTOMER GUIDE: Importing Data

### Import File Examples

You may import many columns of data per table. The four (4) example formats below are for demonstration purposes only. Refer to the FLEETMATE Data Dictionary for a complete list of available fields/column names.

#### Customer Record

RecType	TX_CUSTNO	TX_NAME	TX_DAYPHONE	TX_STATE
Customer	<b>C00001</b>	JD TRUCKING	111-222-3333	MD
Customer	<b>C00002</b>	GREEN SEDAN	444555-6666	DE
Customer	<b>C00003</b>	MTA	777-888-9999	PA

#### Vendor Record

RecType	TX_ID	TX_NAME	TX_ADDR	TX_CSZ
Vendor	<b>V01</b>	AUTOZONE	123 MAIN ST	SEVERN MD 22222
Vendor	<b>V02</b>	MR TIRE	100 S OAK ST	BEL AIR MD 22221

#### Personnel Record

RecType	TX_EMPID	TX_FNAME	TX_LNAME	TX_STATE	TX_DEPT
Personnel	<b>E00001</b>	JOHN	DOUGH	MD	SHOP
Personnel	<b>E00002</b>	JANE	DOUGH	MD	DISPATCH
Personnel	<b>E00003</b>	MARY	BELL	PA	CUST SVC

#### Vehicle Record

RecType	TX_VIN	DT_YEAR	TX_MAKE	TX_MODEL	TX_STYLE
Vehicle	<b>V00001</b>	2014	FORD	F-250 SD	PICKUP
Vehicle	<b>V00002</b>	2017	FORD	E-250	VAN
Vehicle	<b>V00003</b>	2020	DODGE	RAM 3500	PICKUP

## CUSTOMER GUIDE: Importing Data

### Importing Data – Fixed Format Options

Below are three fixed formats that you can use to update meter values via an import file. The Positions from top to bottom represent columns from left to right. **Row one (1) column headings must not be defined.**

#### Vehicle Meter Update - by Tag No

Pos	Field	Max Len	Notes
1	<b>Record Type</b>	n/a	Literal value "METERUPDATEBYTAGNO"
2	<b>Tag No</b>	16	Tag number of the vehicle to update
3	<b>Odometer</b>	8	New vehicle odometer value (numeric only)
4	<b>Hours</b>	8	New vehicle hours value (numeric only)

#### Vehicle Odometer Update - by Veh No

Pos	Field	Max Len	Notes
1	<b>Record Type</b>	n/a	Literal value "METERUPDATEBYVEHNO"
2	<b>Veh No</b>	16	Vehicle number of the vehicle to update
3	<b>Odometer</b>	8	New vehicle odometer value (numeric only)
4	<b>Hours</b>	8	New vehicle hours value (numeric only)

#### Vehicle Odometer Update - by VIN

Pos	Field	Max Len	Notes
1	<b>Record Type</b>	n/a	Literal value "METERUPDATEBYVIN"
2	<b>VIN</b>	24	VIN of the vehicle to update
3	<b>Odometer</b>	8	New vehicle odometer value (numeric only)
4	<b>Hours</b>	8	New vehicle hours value (numeric only)

## CUSTOMER GUIDE: Importing Data

### Importing Data – Fixed Format

The following fixed format will enable you to adjust inventory values via an import file. **Row one (1) column headings must be defined as listed below.**

#### Update Inventory

Use this fixed import record format to update several fields in an existing inventory record, and to take special actions as noted below. All eleven (11) columns are required.

Pos	Column Heading	Max Len	Notes
1	UPDATEINVENTORY	n/a	Literal value
2	TX_INTPARTNO	24	Your Stock Number
3	TX_TYPE	24	A descriptive category for the part
4	FL_INACTIVE	1	0=Active, 1=Inactive, 2=Delete <sup>1</sup>
5	FL_ISSUEAGAINSTRECEIVING	1	0=Manual cost, 1=Cost from receiving <sup>2</sup>
6	NO_QTY_ONHAND	8	New quantity on-hand for the part <sup>3</sup>
7	AM_COST	8	The cost you paid for the part
8	NO_EXPENSETYPE	1	0=Manual, 1=Avg, 2=FIFO, 3=LIFO
9	NO_MARKUPTYPE	1	0=Manual, 1=Fixed, 2=Percentage
10	NO_MARKUPVAL	8	Markup amount
11	NO_WARRDAYS	8	Warranty period in days for this part

**IMPORTANT:** ALL values that you supply will be accepted unconditionally. Use care to ensure that the values you enter are correct.

**1** If you enter a numeral 2 in column four (4), the part will be deleted from the inventory table. All material previously issued onto work orders using this stock number will remain in-place.

**2** If you set column five (5) to zero, the import processor will automatically purge all existing receiving lines for the stock item, set the expense method to "Manual", and will manually set the cost of the part using the cost value that you supply in column 7.

**3** For inventory items where you are basing your cost on receiving data (e.g., Avg, FIFO, or LIFO cost), the import processor will automatically correct any variances between the number of unissued (i.e., "pending") receiving lines and the system quantity on-hand. Column six (6) should be your physical count.