

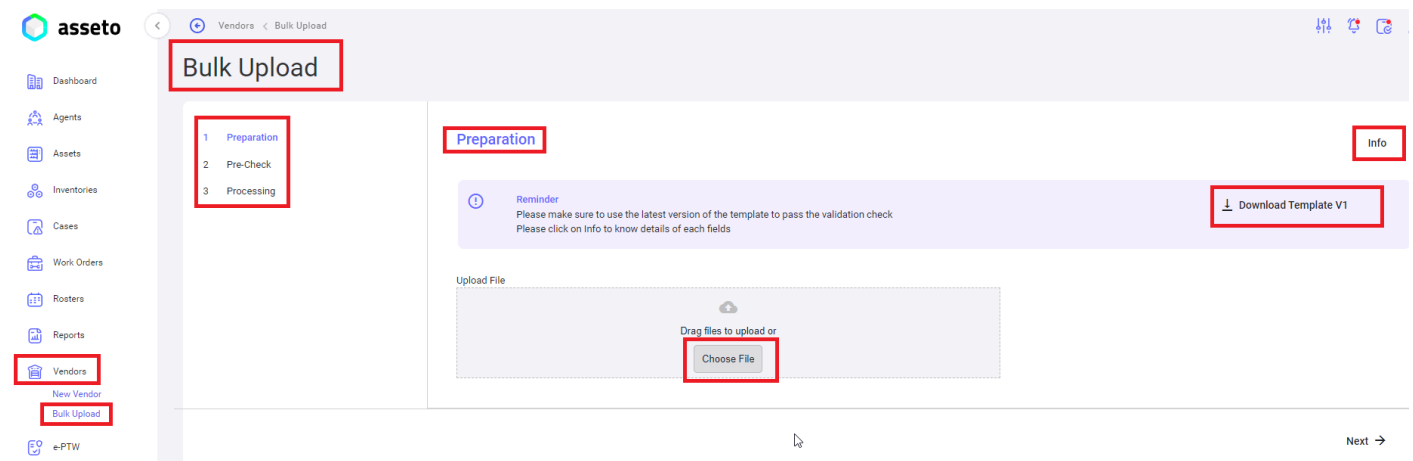
9.6. Vendor Bulk Upload

By using this feature, you can onboard the multiple agents in bulk.

Left Menu -> Vendor -> Bulk Upload

It has 3 sections, those are

1. **Preparation:** To download the template.
2. **Precheck:** validation check: To check for any errors in the uploaded sheet.
3. **Processing:** To view the progress on the bulk upload process.



Info button: users can view the fields validation rules to fill the values in csv file accordingly.

| Vendor Bulk Upload Field Validation | | | |
|-------------------------------------|-----------|--|--|
| Field Name | Mandatory | Validation | Note |
| VENDOR_NAME | ✓ | Please enter permitted characters from AZaz09.'@-/_&*"{}() | e.g John Oliver |
| BUSINESS_REGISTRATION_NUMBER | ✓ | Please enter permitted characters from AZaz09.'@-/_&*"{}() | e.g B111123423423,B-1221212,4343243 |
| DESCRIPTION | | Please enter permitted characters from AZaz09.'@-/_&*"{}() | e.g Onboarding new Vendor |
| COMPANY_EMAIL | ✓ | Please enter permitted characters from AZaz09.'@-/_&*"{}() | e.g John@gmail.com |
| COMPANY_PRIMARY_PHONE | ✓ | (Country Code)Phone Number | Country Code : (1 to 5 Characters), Phone Number : (8-15 Characters), e.g (91)6012345678 |
| COMPANY_SECONDARY_PHONE | | (Country Code)Phone Number | Country Code : (1 to 5 Characters), Phone Number : (8-15 Characters), e.g (91)6012345678 |
| COMPANY_WEBSITE | ✓ | Please enter permitted characters from AZaz09.'@-/_&*"{}() | e.g www.google.com |

1. Preparation: click on download template button to download csv file will be available in your local pc downloads folder as shown by following screenshot.

| | | | | | |
|---------------------|---------------------------|--------------------|-----------------------|------|------------------|
| This PC > Downloads | | | | | Search Downloads |
| Quick access | Name | Date modified | Type | Size | |
| Desktop | Today (2) | | | | |
| Downloads | new asset | 26/7/2024 11:02 AM | Microsoft Word D... | 0 KB | |
| Documents | Vendor Bulk Upload V1 (1) | 26/7/2024 3:36 PM | Microsoft Excel Co... | 1 KB | |
| Pictures | Earlier this week (8) | | | | |

Fill the data on the downloaded csv file for all vendors to be onboarding using bulk upload.

| Vendor Bulk Upload V1 (1) - Excel | | | | | | | | | | | | | | |
|---|----------------|------------------------------|--------------|-------------------------|-----------------------|-------------------------|-----------------|-----------------|---------------------|--------|-----------------|--------------|---------------|------------------|
| Janga Divya Bharathi Robotico (Tech) | | | | | | | | | | | | | | |
| File Home Insert Page Layout Formulas Data Review View Help Tell me what you want to do | | | | | | | | | | | | | | |
| Clipboard Font Alignment Number Styles Cells Editing Add-ins | | | | | | | | | | | | | | |
| POSSIBLE DATA LOSS Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format. | | | | | | | | | | | | | | |
| Don't show again Save As... | | | | | | | | | | | | | | |
| | A | B | C | D | E | F | G | H | I | J | K | L | M | N |
| 1 | VENDOR_NAME | BUSINESS_REGISTRATION_NUMBER | DESCRIPTION | COMPANY_EMAIL | COMPANY_PRIMARY_PHONE | COMPANY_SECONDARY_PHONE | COMPANY_WEBSITE | DATE_OF_JOINING | DATE_OF_LAST_UPDATE | STATUS | PRIMARY_COUNTRY | PRIMARY_CITY | PRIMARY_STATE | PRIMARY_POSTCODE |
| 2 | divi industry1 | 356789 | new company | divyajanga9@gmail.com | (60)1156244669 | | www.abc.com | 26/07/2024 | 25/10/2029 | Active | kl | Malaysia | Kuala Lumpur | sentul |
| 3 | divi industry2 | 356879 | good company | divyabharathi.marreddy@ | (60)1156244669 | | www.den.com | 26/07/2024 | 25/10/2029 | Active | kl | Malaysia | Kuala Lumpur | sentul |
| 4 | | | | | | | | | | | | | | |

Upload the file by clicking on choose file button on the bulk upload page.

asseto Vendors < Bulk Upload

Bulk Upload

1 Preparation 2 Pre-Check 3 Processing

Success
File uploaded successfully

Preparation Info

Reminder
Please make sure to use the latest version of the template to pass the validation check
Please click on Info to know details of each fields

[Download Template V1](#)

Upload File

Drag files to upload or
[Choose File](#)

| File Uploaded | File Size | Number of New Vendor | Template |
|-------------------------------|-----------|----------------------|-----------------------|
| Vendor Bulk Upload V1 (1).csv | 626 KB | 0 | Vendor Bulk Upload V1 |

[Next →](#)

After uploading the csv file 'Next' button will be enabled, you can click on next button the system will navigate to validation check page.

2. Precheck/validation check: if your uploaded file having any errors will be display here, user will not be able to move to next stage unless those errors are corrected, submit button enabled (as shown by below screenshot) if no errors in your csv file.

asseto Vendors < Bulk Upload

Bulk Upload

1 Preparation 2 Pre-Check 3 Processing

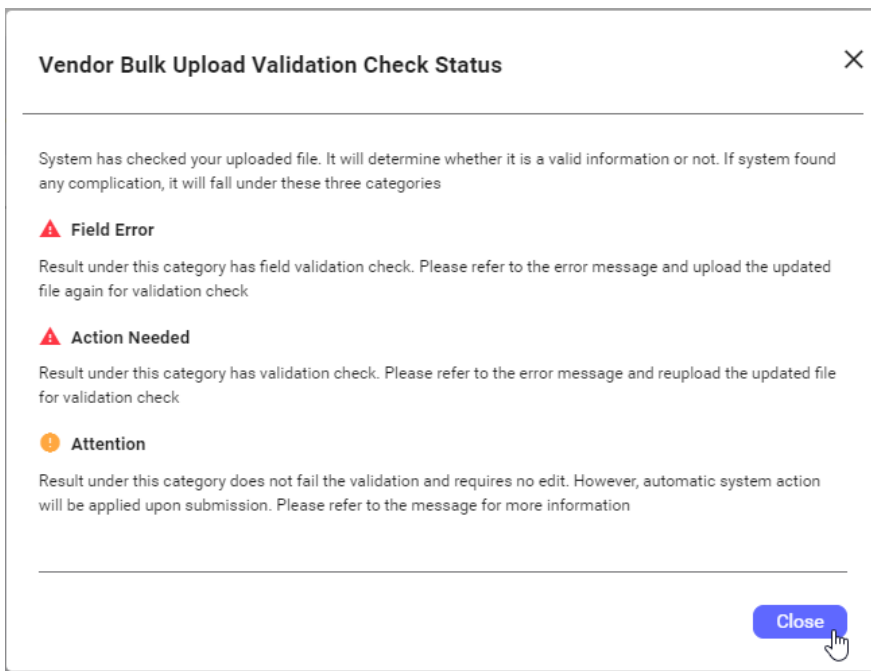
Pre-Check

0 Field Error 0 Action Needed 0 Attention 2 Passed

[< Previous](#) [Submit >](#)

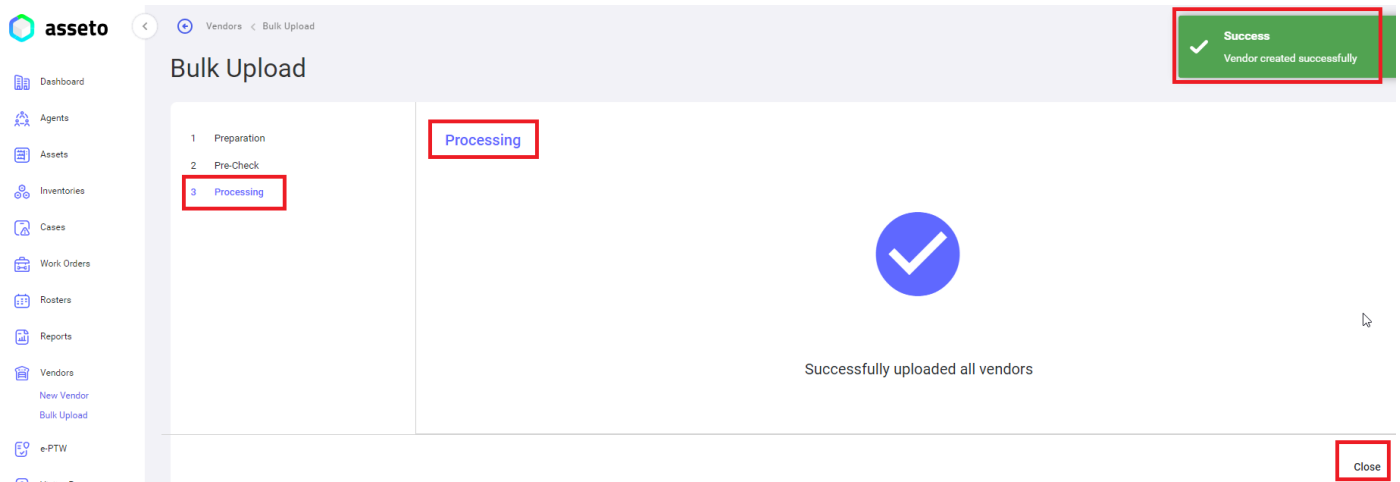
[Terms of Use](#) | [Privac](#)

Note: Click on the tooltip (icon) to check the validation status on validation/pre-check page.



If there are no errors user can view passed count (i.e. number of vendors added) submit button enabled. Click on the submit button system will navigate to next page.

3. Processing: you can see the progress of bulk upload to the application. “Vendors created successfully” confirmation message will be displayed.



Click on close. added Vendors through bulk upload will be displayed on the Vendors list page as shown by following screenshot.

asseto

Dashboard

Agents

Assets

Inventories

Cases

Work Orders

Rosters

Reports

Vendors

e-PTW

Visitor Pass

BCA

Workflow

Subscribers

Contracts

Settings

Vendors

261

Vendors

80

Active

180

Inactive

All Vendors

Search

Filter

| Vendor Name | Skillset | Contact Person | Phone No. | Status | Contractor Type |
|---|------------------------|---|---------------|--------|-------------------|
| <div><div></div><div>divi industry2 divyabharathi.marred...</div></div> | Technical Support DL.. | geetha geetha geetha | +601156244669 | Active | Direct Contractor |
| <div><div></div><div>divi industry1 divyajanga9@gmail.co..</div></div> | COMPUTER HARDWARE | geetha geetha geetha | +601156244669 | Active | Direct Contractor |
| <div><div></div><div>divi company4 divyajanga9@gmail.co..</div></div> | Electrical Engineer | Field Agent-Divi Field Agent-Divi Field Agent-Divi | +917032219459 | Active | Direct Contractor |
| <div><div></div><div>Divi Company3 divyajanga9@gmail.co..</div></div> | Electrical Engineer | Field Agent-Divi Field Agent-Divi Field Agent-Divi | +917032219459 | Active | Direct Contractor |
| <div><div></div><div>Will Taylor Will@gmial.com</div></div> | TEST SANJAY | Sanjay Sanjay Sanjay | +601234565674 | Active | Direct Contractor |

Revision #2

Created 11 September 2024 10:40:00 by Divya Bharathi Marreddy

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