

Vendor EDI Org User Guide

User Documentation for Vendors
to upload Asset data to the Vendor EDI Org

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SFDC Vendor EDI App

This guide is for Salesforce vendors who upload asset data to the SFDC Vendor EDI org.

To use this guide requires basic familiarity with Salesforce navigation and terminology.

Getting Started

To upload asset data, you must have a Salesforce Sales Cloud with a minimum licensing level of Lightning Enterprise. You can use an existing Sales Cloud or [sign up for a new one](#).

When your Salesforce Sales Cloud was set up, your admin created at least three users.

- One administrator account (Admin account) for installing the managed package.
- One user account (Uploader account) for the vendor to upload asset data to the vendor EDI org.
- One user account (Sync account) for Salesforce to access the vendor EDI org via APIs.

Consult with your admin to verify that you can log in using the uploader account. The instructions in this document require that you are logged in as the uploader.

Salesforce Account Usernames and Email Addresses

A Salesforce username is in the form of an email address: [name@domain.com](#).

The username does not have to be a real email address, but it must be unique within the Salesforce org.

However, a Salesforce account must have a real email address associated with it.

The email address is used when Salesforce needs to contact the user, such as to send a password-reset email.

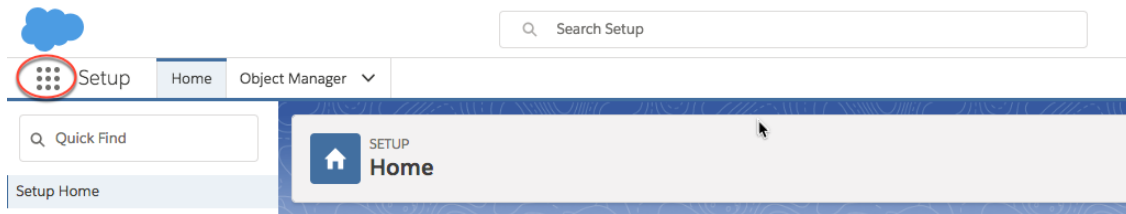
One advantage of this system is that you can use the same real email address for multiple usernames, because only the username needs to be unique. During installation and setup make sure that you are providing the correct information for the username or email address.

Start the Vendor EDI App

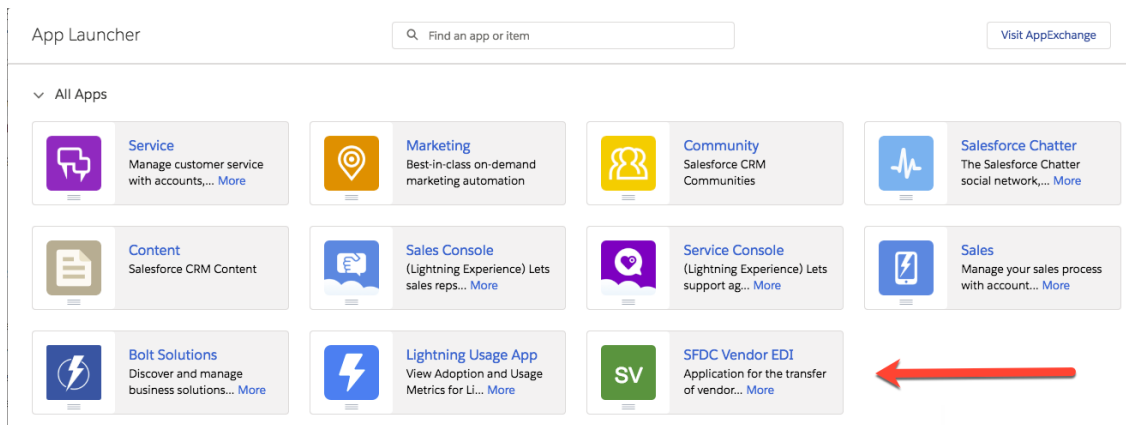
Users who upload asset data to the SFDC Vendor EDI org will need to become familiar with the SFDC Vendor EDI application, outlined below.

1. Using the Uploader account, log into the Vendor EDI org.

2. Open the App Launcher by clicking the dot icon in the upper left.



3. In the App Launcher, click the SFDC Vendor EDI tile. If the SFDC Vendor EDI tile is not visible, use the search bar to locate the app.



4. The application has four tabs: SFDC Assets, SFDC Asset SKUs, SFDC Facilities, and SFDC Asset Sync Logs. These tabs represent the custom objects within the application.



SFDC Assets

This tab contains asset information that will be transferred to Salesforce.

Use this tab to upload asset data, review synchronization status of data, and update assets in case of errors.

SFDC Asset SKUs

This tab contains a list of all valid SFDC SKUs.

Every vendor asset must be associated with a Salesforce SKU ID from this list.

The uploader user will typically not need to visit this tab.

SFDC Facilities

This tab contains a list of all valid SFDC Facility codes.

Every vendor asset must be associated with a valid SFDC facility code, or that value must be blank.

SFDC Rack Architectures

This tab contains a list of all valid SFDC Rack Architecture.
Every vendor asset must be associated with a valid SFDC Rack Architecture, or that value must be blank.

SFDC Country

This tab contains a list of all valid ISO 2 character country codes.

SFDC Asset Sync Logs

This tab contains logging data.
Use these logs to debug and troubleshoot any issues.

Uploading Asset Information

You can upload asset data using the web interface or the Data Loader.

When you upload asset data to the Vendor EDI org, it appears in the SFDC Assets tab. This data will be transmitted to Salesforce.

Upload Asset Data Using the Web Interface

1. Log into the Vendor EDI org using the Uploader account.
2. On the SFDC Assets tab, click **New** to create an SFDC asset record.
3. Enter the relevant information, and click **Save**. For information about the fields and their requirements, see [SFDC Asset Object Schema](#).

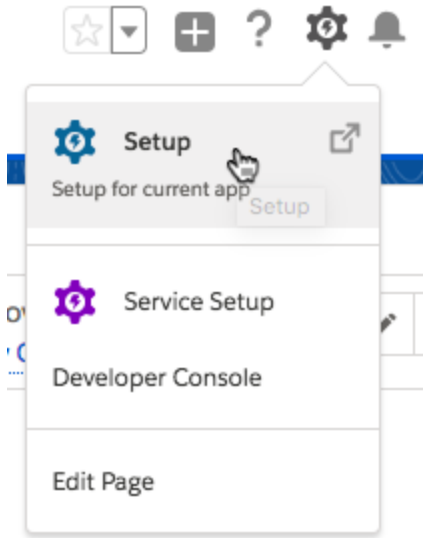
Upload Asset Data Using the Data Loader

Use the Data Loader to bulk upload data from a CSV file.

Download the Data Loader

You can download a Windows or macOS Data Loader from the Vendor EDI org.

1. Log into the Vendor EDI org using the Admin account.
2. Click the gear icon in the upper right, and select **Setup**.



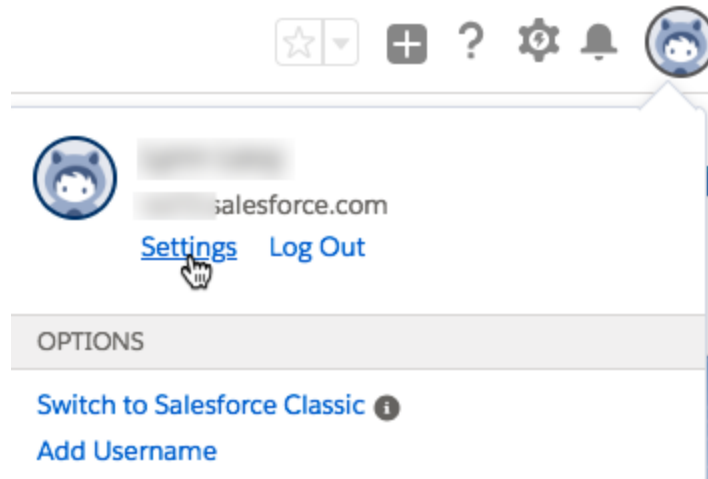
3. From Setup, in the Quick Find box, enter `Data Loader`, and then select **Data Loader**.
4. Download the Data Loader for your operating system.
5. Follow the instructions to complete the installation.

Reset Your Security Token

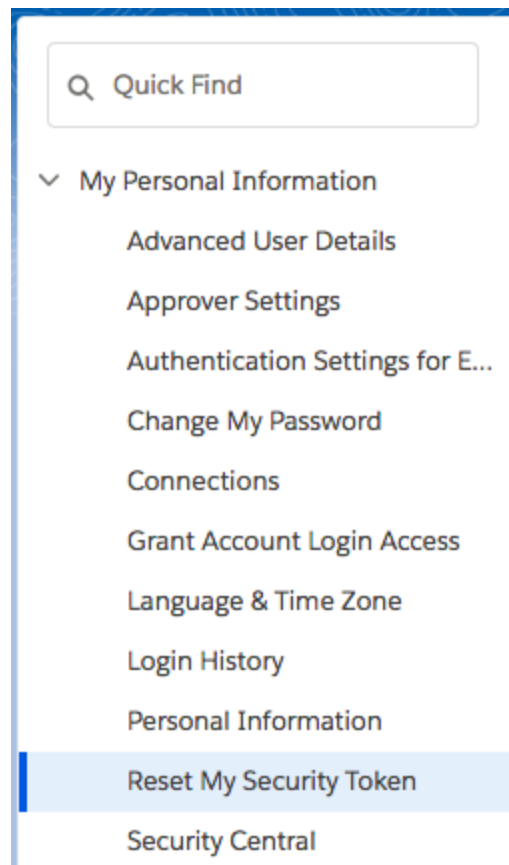
Data Loader requires a security token—a case-sensitive alphanumeric code that’s tied to your password. Salesforce uses the security token to recognize you as a valid user when you access Salesforce through desktop clients, through the API, or from an untrusted IP address. When you log in to Salesforce from the Data Loader, you add the security token to your password.

If you do not have a security token, or if you have recently changed your password, reset your token.

1. Log in to the Vendor EDI org using the Uploader account.
2. Click on your user icon in the upper right, and select **Settings**.



3. Under My Personal Information, select **Reset My Security Token**

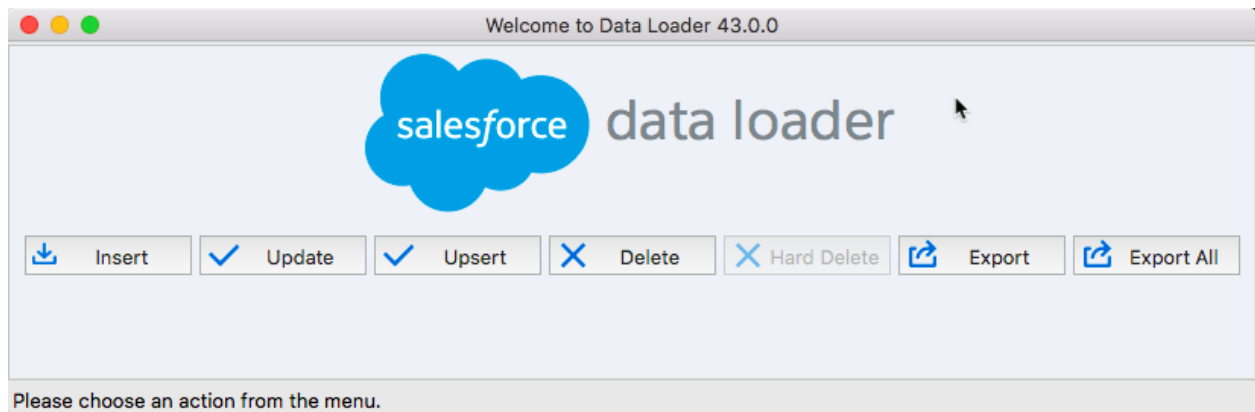


4. In the Reset My Security Token dialog box, click **Reset Security Token**.
5. Check the email associated with the Uploader account for the new security token.

Run the Data Loader

Data Loader is a separate desktop application that provides a quick way to load bulk data into a Salesforce org. It has a wizard-like interface that guides you through the uploading process.

1. Start the Data Loader application from its installed location.
2. Click **Insert** to start the wizard.



Log In to the Vendor EDI Org in Data Loader

1. To connect Data Loader to your Vendor EDI org, enter the uploader account's username. When you enter the password, *append the security token to the password*.

Load Inserts

Step 1: Log In

Log in to the Salesforce org that you're importing to or exporting from.



☐ OAuth ☒ Password Authentication

Username:

Password:

Salesforce Login URL:

Login successful

< Back Next > Cancel Finish

2. Click **Log In**. If successful, **Login successful** appears next to the button.
3. Click **Next**.

Select and Load the CSV File

4. Select the **SFDC Asset** object from the list of Salesforce objects.
5. Select the CSV file that contains the asset data to transfer to Salesforce.
6. Click **Next**.
7. The Data Loader loads the CSV file and displays the number of records read. Verify that the reported value matches the number of asset records in your CSV file, and click **OK**. If the value does not match, make sure you chose the correct file, and that there are no blank lines in the file.

Map Your Data

The Data Loader associates the column headings in your CSV file with SFDC Asset field names based on a map that you create. Data Loader walks you through the process of creating or modifying a map.

Make a New Map

1. To create a map or edit the current one, click **Create or Edit a Map**.

Load Inserts

Step 3: Mapping

Map your fields (CSV columns) to the Salesforce object.



Choose an Existing Map

Create or Edit a Map

Current Field Mapping:

File Column Header	Name
Parent_Rack	
Asset_Number	
DRAC_MAC	
Serial_Number	
ShipTo	
Rack_Position	
SKU	
POrder	
MAC	

< Back

Next >

Cancel

Finish

2. Compare the Salesforce field names to the CSV column names.
3. If all your CSV column headings exactly match the asset data field names, click **Auto-Match Fields to Columns**.

- If your column headings do not exactly match the asset data field names, drag the Salesforce fields to the corresponding column headings in the CSV file.

Mapping Dialog

Match the Salesforce fields to your columns.

Clear Mapping Auto-Match Fields to Columns

Name	Label	Type
OwnerId	Owner ID	reference
Vendor_EDJ_Asset_Number__c	Asset Number (Deprecated)	string
Vendor_EDJ_MAC_address__c	MAC address	string
Vendor_EDJ_Parent_Rack_Asset_Number__c	Parent Rack Asset Number	string
Vendor_EDJ_Purchase_Order__c	Purchase Order	string
Vendor_EDJ_Rack_U_Position__c	Rack U Position	string
Vendor_EDJ_Salesforce_SKU_ID__c	Salesforce SKU ID	string
Vendor_EDJ_Serial_Number__c	Serial Number (Deprecated)	string

Drag the Salesforce fields down to the column mapping. To remove a mapping, select a row and click Delete. 

File Column Header Name	
Asset_Number	Vendor_EDJ_Asset_Number_ExtId__c
DRAC_MAC	Vendor_EDJ_DRAC_MAC_Address__c
MAC	Vendor_EDJ_MAC_address__c
Parent_Rack	
POrder	
Rack_Position	
Serial_Number	
ShipTo	
SKU	

OK Save Mapping Cancel

- To save the map for reuse, click **Save Mapping**. The map is saved in a file with the extension .SDL.
- Click **OK**.
- Click **Next**

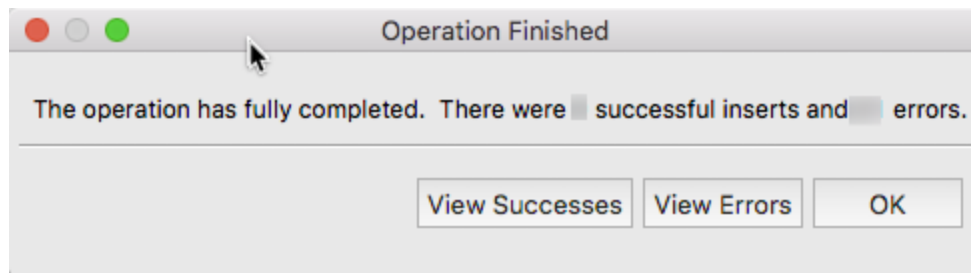
Reuse an Existing Map

- To reuse a saved mapping file, or to use one that has been provided to you, click **Choose an Existing Map** at the start of the mapping step.
- Select an SDL file.
- Click **Next**

Save Output Files

1. Select where to save error and success files, and click **Finish**.
2. Click **Yes** in the warning dialog.

Data Loader uploads the CSV contents to the SFDC Asset object in your Vendor EDI org. The Operation Finished dialog box displays the number of successes and errors.



The timestamped output files are written to the directory you selected.

View and Correct Errors

1. Click View Errors.
2. Review the error messages for the failed records.
3. Edit the `error<timestamp>.csv` file and correct the errors.
4. Repeat the load process using `error<timestamp>.csv` file as input.

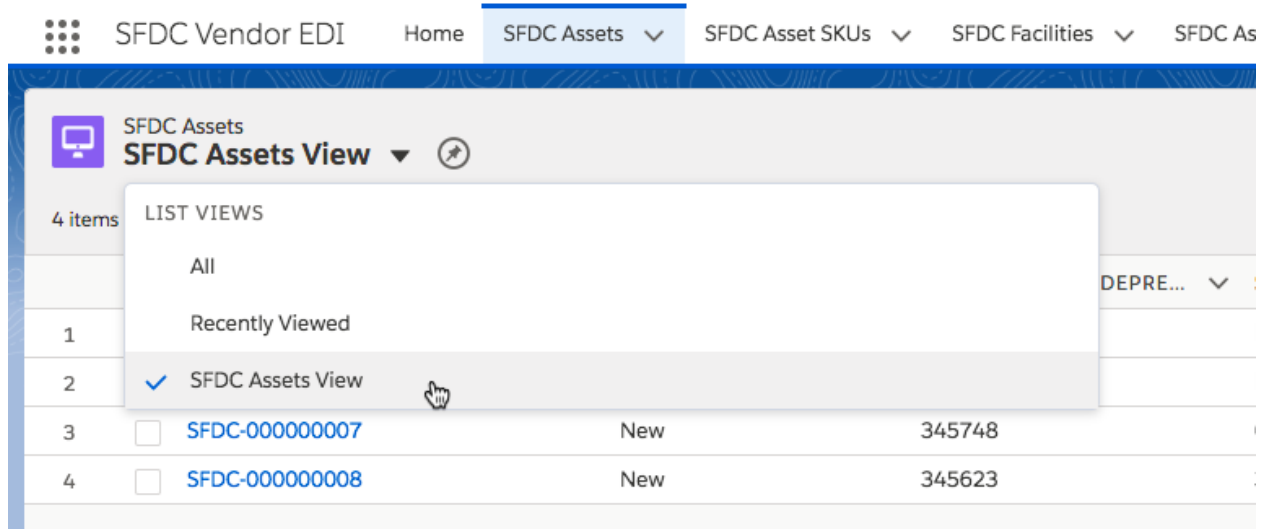
Uploading only the `error<timestamp>.csv` file ensures that only corrected errors are added to the Vendor EDI org and avoids re-adding successful records, which would generate duplicate record errors.

More information about troubleshooting errors can be found in the Vendor EDI Org: Troubleshooting Guide.

View Assets

After the assets have been created in the vendor EDI org, click the **SFDC Assets** tab to view them.

To see a view of the assets in the Vendor EDI org which includes useful data like Sync Status, in the upper left, select the down arrow under SFDC Assets, and select **SFDC Assets View**.



Click an individual asset to view or edit its details.

Troubleshooting Data Loader and Sync Errors

To diagnose and repair upload and sync errors, see the [Vendor EDI Org: Troubleshooting Guide](#).

SFDC Asset Object Schema

Field Name	Description	Value and Format Requirements
Asset Number	Represents the asset tag (also includes the rack #).	This field cannot be blank. If there is no asset number, use N/A. Asset records with a value of N/A are not imported. The value must be unique, but multiple N/A instances are allowed.
Serial Number	Represents the serial number of the asset.	This field cannot be blank. If there is no serial number, use

		N/A. Asset records with a value of N/A are not imported. This value must be unique but multiple “N/A” instances are allowed.
Salesforce SKU ID	Unique number per tech asset type.	Must be a valid SKU number that exists in the SFDC Asset SKU list.
Purchase Order	PO number from Salesforce.	Must be a six-digit number or greater. Use leading zeros if necessary. Enter 000000 for an unknown purchase order.
MAC Address	Follows the MAC address format (for example, a1b2c3d4e5f6).	Must be a valid MAC format. Blank fields and N/A entries are allowed.
DRAC MAC Address	Follows the MAC address format. Vendor-specific names: Dell: DRAC HP: ILO Sun: ILOM IBM: IMM Used for Intelligent Platform Management Interface (IPMI).	Must be a valid MAC format. Blank fields and N/A entries are allowed.
TPM Endorsement Key (EK) Public	The EKpub is the public key portion of the Endorsement Key Available in version 1.16	There is no validation. The expected value is the SHA-256 hash
Country of Origin	The Country of Origin is a 2 character text field representing the country of manufacture assigned by the Manufacturer.	The expected value is the two character ISO 3166 Alpha-2 value. For example values, DE for Germany or JP for Japan.

	Available in version 1.17	This field can be blank. Note: The value NA cannot be used to represent blank because NA is a valid country code
Export Classification	The Export Classification are export codes governing the product as assigned by the Manufacturer Available in version 1.17	The expected values are the Export Control Classification Number (ECCN). If there are multiple codes, the codes should be separated by a comma. Examples of export classification codes are "EAR99, 5A002, 5A992". This field can be blank.
Import Classification	The Import Classification are import codes governing the product as assigned by the Manufacturer Available in version 1.17	If there are multiple codes, the codes should be separated by a comma. Examples of import classification code is "8471.81.9900". This field can be blank.
Rack U Position	Position in the rack.	The value entered must be a number between 1 and 99. For PDUs and CDUs, the values P1 through P9 are allowed. Blank fields and N/A entries are allowed.
Component Identifier	The position the asset is relative to the enclosure it is slotted in. This field is applicable to Open Compute Project racks. For traditional rack or loose assets the value can be left blank. Maximum of 8 characters	Validation the value are alphanumeric characters. Blank and "N/A" are allowed

	Introduced in version 1.12	
Node Identifier	The position the asset is relative to the component it is slotted in. This field is applicable to Open Compute Project racks. For traditional rack or loose assets the value can be left blank. Maximum of 8 characters Introduced in version 1.12	Validated the value contains only alphanumeric characters. Blank and “N/A” are allowed
Parent Asset Number	Parent rack where the device is installed.	This field must be populated if Rack U Position is populated. Must be at least six digits. The field can also be blank.
Rack Architecture	Rack Architecture designation for the rack. Field should be blank for loose assets Introduced in version 1.14	Must be a valid rack architecture name that exists in the SFDC Rack Architecture list.
Ship to Facility Code	Facility code of where the assets are shipped.	Must be a valid facility code that exists in the SFDC Facilities list.
Sync Status	For Salesforce use. The default value for new records is New.	Managed by Salesforce. The vendor can’t set or modify this field.

Revision History

Version	Date	Modified By	Comments
1.0	Aug 5 2016	Ben Yick	Initial version for v1.0
1.1	Feb 14 2017	Ben Yick	New Features in Version 1.9. Ship To Facility Code

			Upsert functionality using External Id
1.2	Apr 25 2017	Ben Yick	Update documentation on Errors
1.3	Oct 14 2017	Ben Yick	Update on feature to version 1.11 (AppExchange Link)
1.4	Jan 11 2018	Ben Yick	Update the Getting Started section
1.5		Ben Yick	Update for version 1.12 (<i>release date tbd</i>) - Typo update in version 1.12 of the Managed Package
1.6	June 28 2018	Lynn Levy	Update screen grabs and instructions for Lightning Experience. Minor edits. Extracted troubleshooting guide.
1.7	Sept 6 2018	Ben Yick	Update on features included in version 1.12 (AppExchange Link) - Addition of two new fields to the SFDC Asset object to support Open Compute Platform configurations - Component Identifier - Node Identifier - Update documentation with SFDC Asset object description
1.7	Jan 2020	Ben Yick	Update on features included in version 1.14 (Dec 2019) (AppExchange Link) - Added new field called Rack Architecture
1.8	May 2021	Ben Yick	Update to include the TPM EKpub field added to the SFDC Asset in version 1.16 (May 2021) (AppExchange Link)
1.9	July 2021	Ben Yick	Feature added in version 1.17 Add three optional fields: - Country of Origin - Import Classification - Export Classification
1.10	Nov 11 2021	Ben Yick	Bug fix version 1.18 - Fix validation rule bug on Serial Numbers and Asset Numbers