

# Migrating Master Data to aACE

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This guide provides information, links, and tips about the best practices for importing your data. It is intended for system administrators.

Master data is that which is required to complete a transaction. Master data records can be imported or entered by hand. Regardless of the method you choose, aACE has data management tools to make the migration process easier.

Because one element of master data is often related to another, it is most efficient to follow the order listed below when migrating your data to aACE:

1. Offices / Departments – Required for Team Member records
2. Team Members
3. GL Accounts (Chart of Accounts) – Required for Line Item Codes
4. Tax Profiles (optional) – Can be linked to Companies
5. Rate Cards (optional) – Can be linked to Line Item Codes and Companies
6. Companies – Can be linked to Line Item Codes as preferred vendors
7. Time Line Item Codes – Do these before Task Groups if you plan to link them to Task Groups
8. Task Groups (optional) – Can be linked to Line Item Codes
9. Item Line Item Codes – Can be used as Bill of Materials in Assembly Line Item Codes
10. Inventoried Item Line Item Codes – Can be used as Bill of Materials in Assembly Line Item Codes
11. Assembly Item Line Item Codes – Can be used as Bill of Materials in other Assembly Item Line Item Codes
12. Inventoried Assembly Items – Can be used as Bill of Materials in other Assembly Item Line Item Codes
13. Purchase Line Item Codes
14. Other Line Item Codes
15. Contacts – If not done with Company records

## Help Guides about Importing

It is important to follow all import instructions closely so that data imports properly.

- [Downloading an Import Template](https://aace6.knowledgeowl.com/help/downloading-an-import-template) (https://aace6.knowledgeowl.com/help/downloading-an-import-template)
- [Preparing a Data File for Importing](https://aace6.knowledgeowl.com/help/preparing-a-data-file-for-importing) (https://aace6.knowledgeowl.com/help/preparing-a-data-file-for-importing)

- [Importing Records](https://aace6.knowledgeowl.com/help/importing-records) (https://aace6.knowledgeowl.com/help/importing-records)
- [Mapping Import Fields by Hand](https://aace6.knowledgeowl.com/help/mapping-import-fields-by-hand) (https://aace6.knowledgeowl.com/help/mapping-import-fields-by-hand)
- [Import Validation Errors](https://aace6.knowledgeowl.com/help/handling-import-validation-errors) (https://aace6.knowledgeowl.com/help/handling-import-validation-errors)
- [Importing and Setting Up Your Chart of Accounts](https://aace6.knowledgeowl.com/help/importing-and-setting-up-your-chart-of-accounts) (https://aace6.knowledgeowl.com/help/importing-and-setting-up-your-chart-of-accounts)

## Helpful Hints

We recommend backing up your live files *prior* to any large data import so that you have a file set to return to should something go awry.

Large imports can take a while to process. This might block other users' access to a module during the import. If you are preparing a large data import, be sure to coordinate with other users.

All List Views have batch record updating tools available in the Actions options. These tools can update fields and record relationships for large groups of records. Using them can save you time and reduce data entry errors.

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