Preparing a Data File for Importing

Last Modified on 07/05/2022 1:44 pm EDT

This guide explains ways you can verify that your data is ready to import. It is intended for advanced users.

Once you have an import mapping template (http://aace6.knowledgeowl.com/help/downloading-an-import-template) ready, be sure to review and clean the data gathered in it. This can prevent wasted time from repeated corrections and updates to the records after you have imported them.

Review Your Source Data

Evaluate which data fields you wish to import to the aACE module. For example, if you are importing Company records, make sure you have the essential data ready, including company name, address, phone numbers, and web address.

Review the Module's Data Requirements

Most aACE modules require certain data points. To identify a module's required fields, create a new record in that module and note which fields are highlighted in pink.

Your source file must contain data for the required fields and that data must be valid. For example, records in the Line Item Codes module require a Line Item Code Type. If this column is not present or is left blank on the import spreadsheet, the records will *not* import.

Other fields may be optional. If these columns are not present or are left blank on the import spreadsheet, aACE will leave the fields blank or auto-fill them with a default value.

Review Field Names and Plan for Data Mapping

Whether you are using an import template from the aACE module or another source file, make sure the field names (i.e. the column headings) are correct and the data is matched to the correct column.

During the actual import with a FileMaker or Excel spreadsheet, FileMaker can map the data based on column headings. If you are importing a tab-delimited file, you must do the data mapping manually.