

Preparing a Data File for Importing

Last Modified on 11/10/2025 4:43 pm EST

This guide explains ways you can confirm 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) (<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.

Table of Contents

- [Review Your Source Data](#)
- [Review the Module Data Requirements](#)
- [Review Field Names and Plan for Data Mapping](#)

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.

[?Top](#)

Review the Module 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 required data is not present or is left blank on the import spreadsheet, the records will not import.

Line Item Codes

Record: 519 of 519

New Edit Delete Print Actions

Code: Code

Description

PENDING

Item

Setup

Notices Tasks Emails Docs

General Info

Type

Est Unit Cost

Price

0.00

0.00

Manufacturer

Mfr Part #

MSRP

0.00

Unit Info

Net Wt

Gross Wt

L

W

H

Est Ship Cost

0.00

SKU

MOQ

Sale Case Qty

UOM

Each

Default Value for Order Item Add'l Info

Options

Custom Prices

Vendors

Offices

Photos

Code

Description

Quantity

Alternate

Upgrade

Auto-Add

Notes

Cancel

Save

Other fields may be optional. If this data is not present or is left blank on the import spreadsheet, aACE leaves the fields blank or automatically enters a default value.

[Top](#)

Review Field Names and Plan for Data Mapping

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

During the [data import process](https://aace6.knowledgeowl.com/help/importing-records) 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.