# Importing Records

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This guide explains the general steps to import data from a source file to an aACE module. It is intended for general users.

#### After you understand how FileMaker approaches data imports

(https://aace6.knowledgeowl.com/help/overview-of-importing-data) and you have prepared your data (https://aace6.knowledgeowl.com/help/preparing-a-data-file-for-importing), you are ready to import the records.

When you start an import, make sure your schedule is organized so you will have enough time to complete it. You may need to plan in additional time when importing an especially large spreadsheet.

## Importing the Records in the Desktop App

Note: The following instructions are for users of the **rich app** version of aACE, accessed via a client on your device. For instructions on importing data to the **browser-based** version of aACE, accessed via WebDirect, <u>see below</u>.

The import process is standard across all modules. This guide demonstrates the process using the Companies module.

1. From the module's list view, click Actions > Import [records].

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2. At the confirmation dialog, click the appropriate step:

0	Message	
	Importing companies requires the following steps: 1) Download the template worksheet 2) Populate your worksheet with data to import 3) Import the saved worksheet	
	Step 1 Step 3 Cancel	

- Step 1 Use if you do not already have a prepared spreadsheet. This will generate a spreadsheet that includes the currently displayed records with the relevant column headings. Save this export in *Excel or FileMaker* format. Populate the spreadsheet with the needed data. Then begin the import process again, but this time click Step 3.
- **Step 3** Use if you already have an Excel or FileMaker spreadsheet with the needed data.
- 3. At your workstation's **Open File** dialog, locate and open your spreadsheet source file.

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4. At the Import Field Mapping dialog, verify the following settings (highlighted on the following screenshot):

0 0 •	Specify Import	Order		
Specify the import order for the target fields.	SOURC	E Add	TARGET	
<>1 of 11	Companies_IMPORT.xlsx	B	Current Table ("Companies Cache")	
Use as Field Names 🟮	Source Fields	Mapping	Target Fields Matching Names 🕄	
Company Name	Company Name	Import	Company Name	
Company Abbr	Company Abbr	Import	Company Abbr	
Company Type	Company Type	Import	Company Type	
Group	Group	Import	Group	
Subgroup	Subgroup	Import	Subgroup	
Notes	Notes	Import	Notes	
Office Addr Line 1	Office Addr Line 1	Import	Office Addr Line 1	
Office Addr Line 2	Office Addr Line 2	Import	Office Addr Line 2	
Office Addr City	Office Addr City	Import	Office Addr City	
Office Addr State	Office Addr State	Import	Office Addr State	
Office Addr Postal Code	Office Addr Postal Code	Import	Office Addr Postal Code	
Office Addr Country	Office Addr Country	Import	Office Addr Country	
Office Addr Postal Format Name	Office Addr Postal Format Name	Import	Office Addr Postal Format Name	
Office Addr Mailing Label	Office Addr Mailing Label	Import	Office Addr Mailing Label	
Is Residential	Is Residential	Import	Is Residential	
Phone	Phone	Import	Phone	
Alternate Phone	Alternate Phone	Import	Alternate Phone	
Fax	Fax	Import	Fax	
Phone Number Format	Phone Number Format	Import	Phone Number Format	
Email	Email	Import	Email	
Email Format	Email Format	Import	Email Format	
Web Address	Web Address	Import	Web Address	
Parent Company Abbr	Parent Company Abbr	Import	Parent Company Abbr	
<ul> <li>Import Options</li> </ul>				
Character set for source file:	Macintosh 🗘	Perform the aut	to-enter options for fields during import	
Field delimiter for source file:			umber, creation timestamp, modification	
• Tab		timestamp, lookup	S.	
	•	Preserve extern	nal container storage	
O Other:	R	epeating Fields:	Keep values in the original record	
?			Cancel Import	

A. Row Counter – Set to row **1** and **Use as Field Names**.

This sets the spreadsheet header row as the source fields, making it easy to match the names of the target fields.

B. Source-to-Target – Set to Add.
 Attention: "Adding" new records is *required*. The incoming data is brought in as

*new* records to a cache table. After that stage is complete, the data is transferred to your existing business records.

C. Target Fields – Set to Matching Names.

This automatically matches the source field names to the database target field names.

Note: If you are manually mapping the import fields, set these options, then continue with the process in the guide for <u>Mapping Import Fields By Hand</u>

(https://aace6.knowledgeowl.com/help/mapping-import-fields-by-hand).

- 5. Scan the list of field names to verify that Source Fields are matched correctly to Target Fields, then click **Import**.
- 6. At the Import Summary dialog, review the number of records updated to the cache table, then click **OK**.



aACE completes a validation check on the data in the cache table:

- If no violations are found, aACE imports the records.
- If violations *are* found, aACE displays another message summarizing the <u>import</u> validation errors (https://aace6.knowledgeowl.com/help/handling-import-validation-errors).
- 7. At the confirmation message, review the number of imported records and click **OK**.
- 8. At the activation message, click Activate.

	Message	
Activate all 13	5 companies in this list?	
	Cancel	tivate

Note: You can also leave imported records in Pending status by clicking Cancel. For any

records that are not activated automatically, you can manually activate them later.

#### Manual Activation for Imported Records

To activate a single record:

- 1. At the module's list view, use the <u>Quick Search (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar)</u> bar to locate the desired record.
- 2. On the record's line, click Actions ( → ) > Activate [record].
- 3. At the activation dialog, click Activate.

You can also manually activate multiple records in a batch:

- 1. At the module's list view, use the <u>Quick Search (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar)</u> bar to locate all the desired records for activation.
- 2. On the menu bar, click Actions > Activate [records] in List.
- 3. At the activation dialog, click Activate.

## Importing the Records in aACE Web Direct

Note: The following instructions are for users of the **browser-based** version of aACE, accessed via WebDirect. For instructions on importing data to the **rich app** version of aACE, accessed via a client on your device, <u>see above</u>.

The import process is standard across all modules. This guide demonstrates the process using the Contacts module.

1. From the module's list view, click **Actions** > **Import**.

New 📫	Edit 🖉	Delete 🗙	Print 📇	Actions 🛪
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			Found Set to	to List Set from List
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2. At the confirmation dialog, click the appropriate step:



- Step 1 Use if you do *not* already have a prepared spreadsheet. This will generate a .csv file that includes the currently displayed records. When you open the file, the relevant column headings will be contained in the first cell of the spreadsheet. To separate them and continue with the import process, follow these steps in Excel:
  - I. Select column A in the spreadsheet. This should highlight the entire first column.
  - II. Navigate to the **Data** tab and click on the **Text to Columns** button.
  - III. In Step 1 of the Convert Text to Columns Wizard, select **Delimited** and click

Next.
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	Convert Text to Columns Wizard - Step 1 of 3
The Text Wiza	rd has determined that your data is Fixed Width.
If this is correc	t, choose Next, or choose the Data Type that best describes your data.
-	<ul> <li>Characters such as commas or tabs separate each field.</li> <li>Fields are aligned in columns with spaces between each field.</li> </ul>
	•
Preview of sele	
Preview of sele 1 Salutation, First 2, ***, ***, ***, ***, ***, 3 4 5 6 7 8	ected data: t Name,Middle Initial,Last Name,Suffix,Department,Title,Key Contact,Best Way to Reach,Of
8	Cancel < Back Next > Finish

IV. In Step 2 of the Convert Text to Columns Wizard, uncheck the Tab flag and check the Comma flag. Then click Next.

This screen lets you s	et the delimiters your data contains.
Delimiters	
Tab	Treat consecutive delimiters as one
Semicolon	Text qualifier:
🖌 Comma	
Space	
Other:	
Preview of selected da	ta: = Initial Last Name Suffix Department Title Key Contact Best Way to Reach Dffic

V. In Step 3 of the Convert Text to Columns Wizard, click **Finish**. You will now have a workable spreadsheet.

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This screen lets you select each column and set the Data Format.	
Column data format	
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- VI. Save this export in *Excel or FileMaker* format. Populate the spreadsheet with the needed data. Then begin the import process again, but this time click Step 3.
- **Step 3** Use if you already have an Excel or FileMaker spreadsheet with the needed data.
- 3. At your workstation's **Open File** dialog, locate and open your spreadsheet source file.

4. At the Import Field Mapping dialog, verify that the **Don't import first record (contains field names)** flag is checked.

Source Fields	Target Fields		
Salutation	First Name	~	1
First Name	Last Name	~	
Middle Initial	Company Rec ID	~	
.ast Name	Company Name	~	
Suffix	Company Addr Line 1		
Department	Company Addr Line 2	~	
Title	Company Addr City	~	
Key Contact	Company Addr State	~	
Best Way to Reach	Title	~	
Office Phone	Company Addr Postal Code	~	
Ext	Company Addr Country	~	
Direct Phone	Direct Phone	~	
Mobile Phone	Office Phone	~	
Home Phone	Ext	~	
Fax	Mobile Phone	~	
nport Action Add new records Update existing records Update matching record			

- 5. Scan the list of field names to verify that Source Fields are matched correctly to Target Fields, then click **Import**.
- 6. At the Import Summary dialog, review the number of records updated to the cache table, then click **OK**.
  - aACE completes a validation check on the data in the cache table:
    - If no violations are found, aACE imports the records.
    - If violations *are* found, aACE displays another message summarizing the <u>import</u> validation errors (https://aace6.knowledgeowl.com/help/handling-import-validation-errors).
- 7. At the confirmation message, review the number of imported records and click **OK**.
- 8. At the activation message, click **Activate**.

Note: You can also leave imported records in Pending status by clicking Cancel. For any records that are not activated automatically, you can manually activate them later.

#### Manual Activation for Imported Records

- 1. To activate a single record:
  - 1. At the module's list view, use the <u>Quick Search (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar</u>) bar to locate the desired record.
  - On the record's line, click Actions ( <u>(https://dyzz9obi78pm5.cloudfront.net/app/image/id/62d98561e7fe3e5cb051a2f4/n/actions-button.png)</u>) > Activate
     [record].
  - 3. At the activation dialog, click **Activate**.
- 2. You can also manually activate multiple records in a batch:
  - 1. At the module's list view, use the <u>Quick Search (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar</u>) bar to locate all the desired records for activation.
  - 2. On the menu bar, click Actions > Activate [records] in List.
  - 3. At the activation dialog, click **Activate**.

## Validation Errors on Your Import

aACE checks every import to validate it against key data fields. This helps ensure ongoing data integrity in your system.

If errors are found, aACE can generate a copy of your import spreadsheet with notes about the trouble areas so you can <u>resolve the import validation issues</u>

(https://aace6.knowledgeowl.com/help/handling-import-validation-errors).