

Importing Records

Last Modified on 01/16/2025 10:54 am EST

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) (<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) (<https://aace6.knowledgeowl.com/help/preparing-a-data-file-for-importing>), you are ready to import the records.

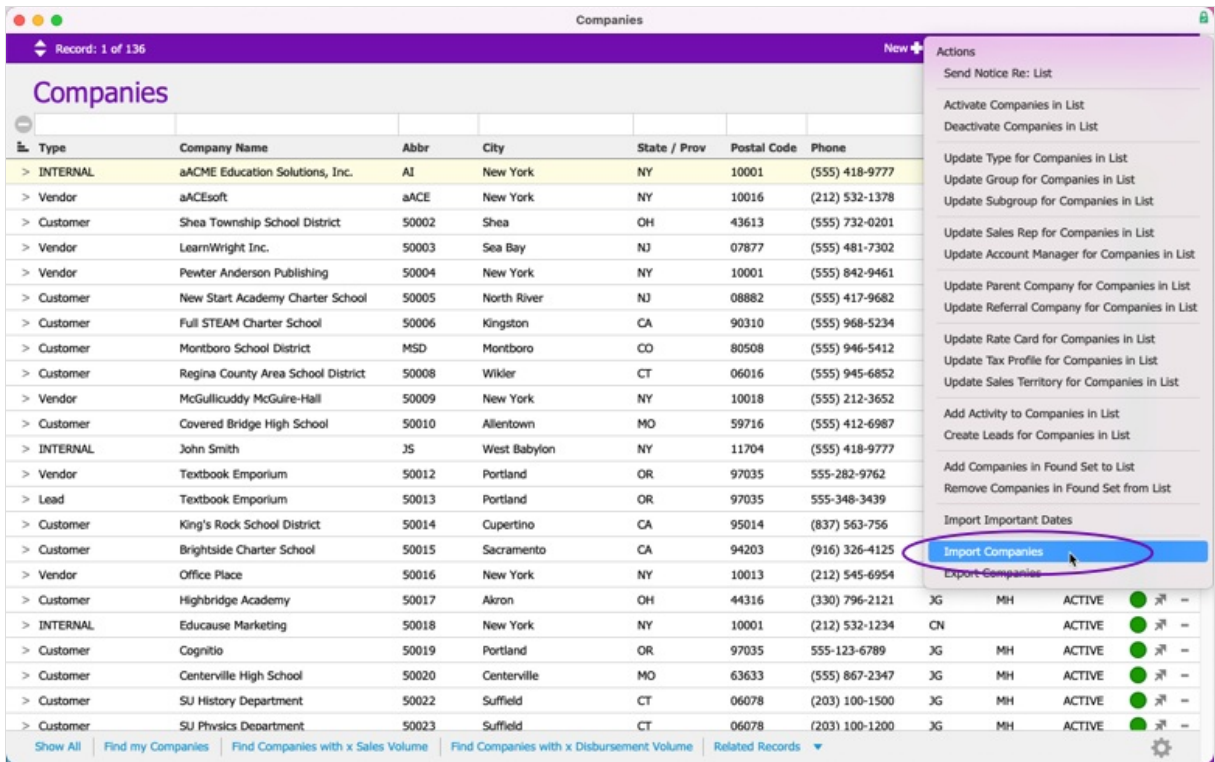
When you start an import, make sure your schedule is organized so you will have enough time to complete it. You may need to plan in additional time when importing an especially large spreadsheet.

Importing the Records in the Desktop App

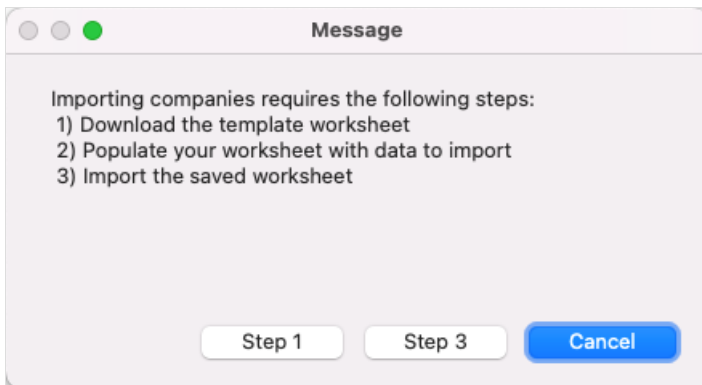
Note: The following instructions are for users of the **rich app** version of aACE, accessed via a client on your device. For instructions on importing data to the **browser-based** version of aACE, accessed via WebDirect, [see below](#).

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]**.

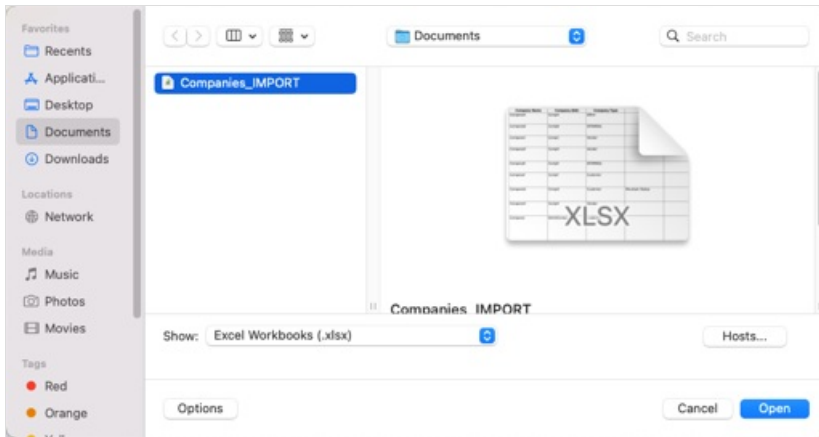


2. At the confirmation dialog, click the appropriate step:

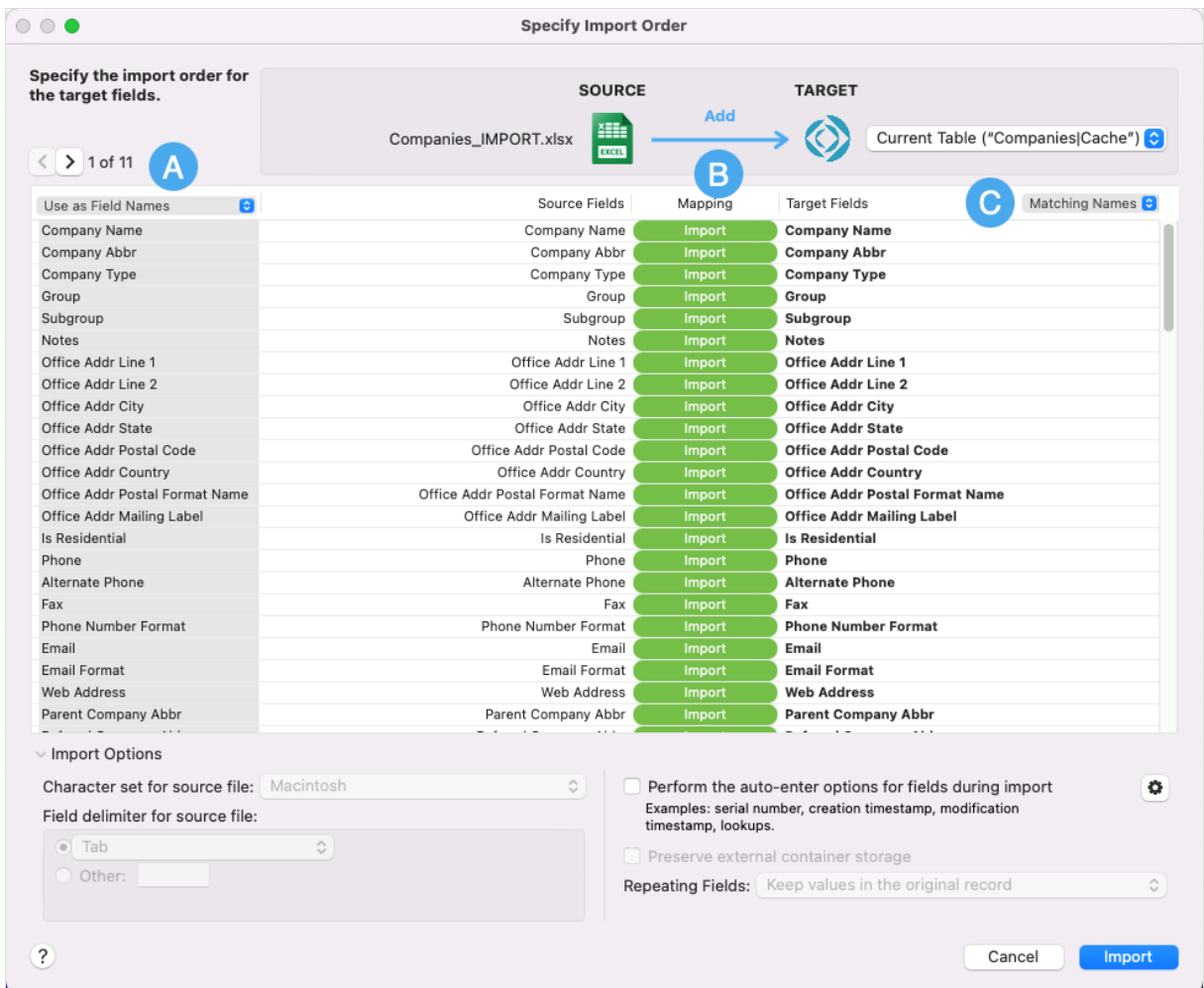


- **Step 1** – Use if you do *not* already have a prepared spreadsheet. This will generate a spreadsheet that includes the currently displayed records with the relevant column headings. Save this export in *Excel or FileMaker* format. Populate the spreadsheet with the needed data. Then begin the import 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.



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



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.

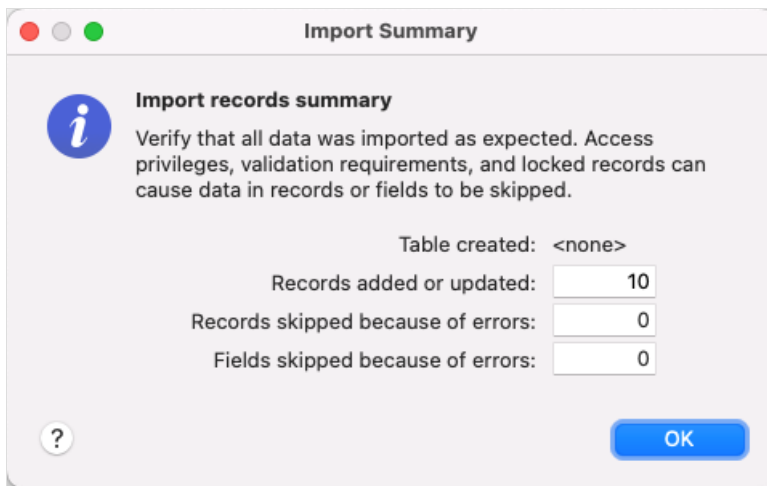
C. Target Fields – Set to **Matching Names**.

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 [Mapping Import Fields By Hand](#)

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

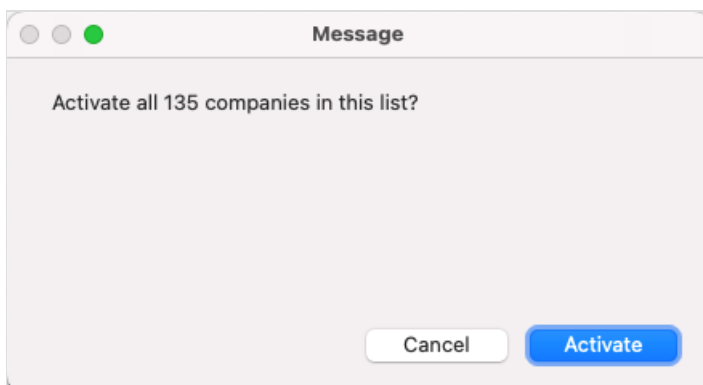
5. Scan the list of field names to verify that Source Fields are matched correctly to Target Fields, then click **Import**.
6. At the Import Summary dialog, review the number of records updated to the cache table, then click **OK**.



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 [import 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

To activate a single record:

1. At the module's list view, use the [Quick Search](https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) 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:

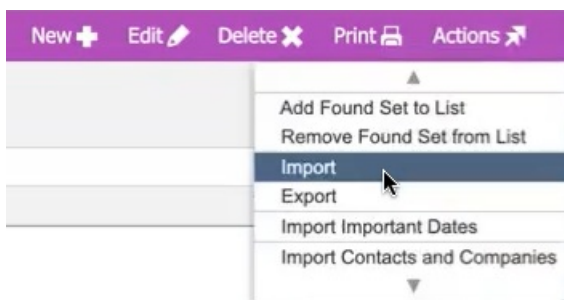
1. At the module's list view, use the [Quick Search](https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) bar to locate all the desired records for activation.
2. On the menu bar, click **Actions** > **Activate [records] in List**.
3. At the activation dialog, click **Activate**.

Importing the Records in aACE Web Direct

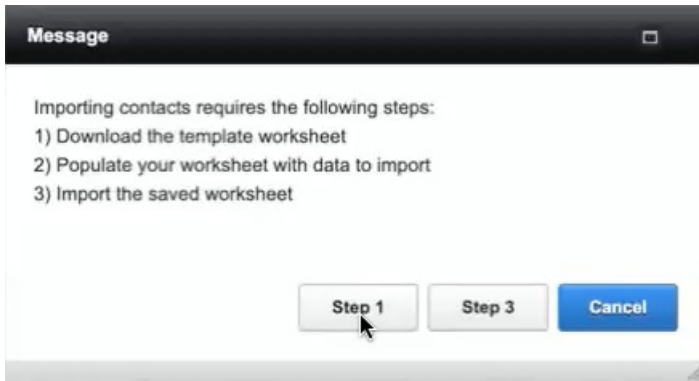
Note: The following instructions are for users of the **browser-based** version of aACE, accessed via WebDirect. For instructions on importing data to the **rich app** version of aACE, accessed via a client on your device, [see above](#).

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

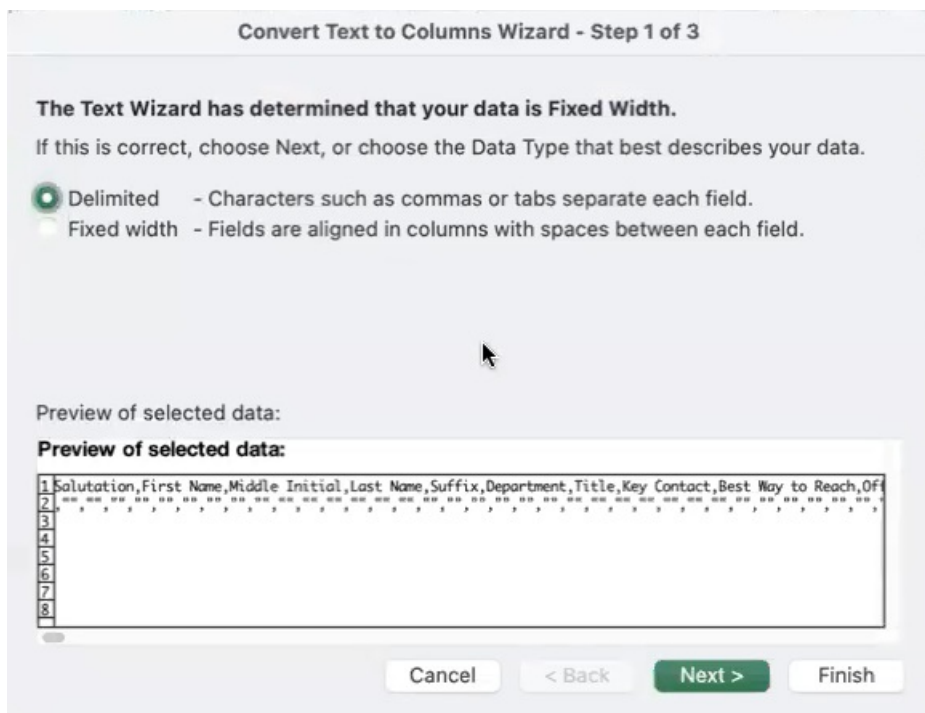
1. From the module's list view, click **Actions** > **Import**.



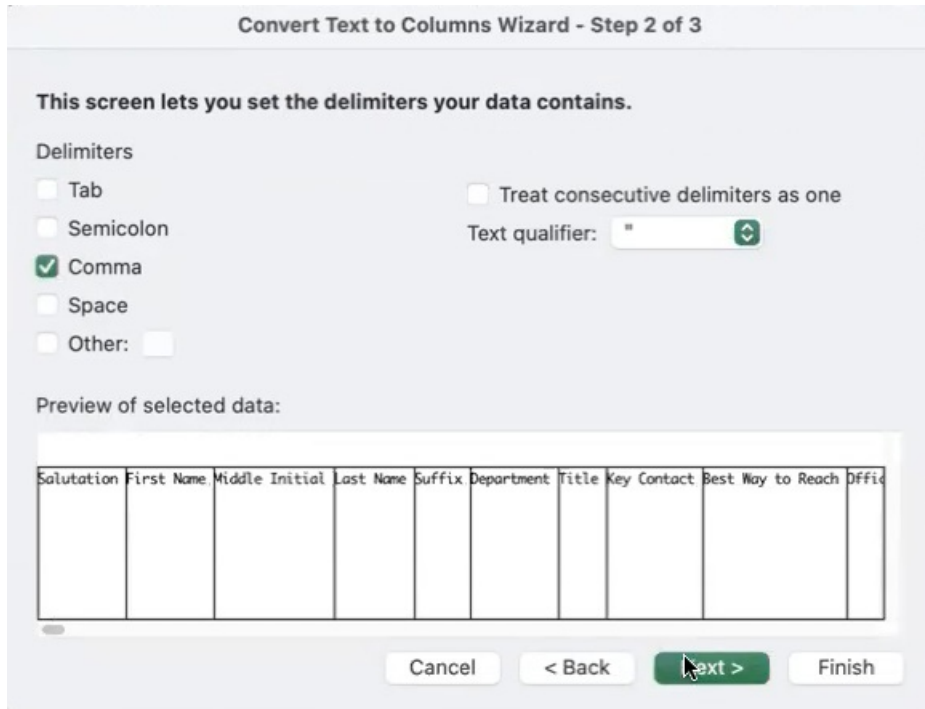
2. At the confirmation dialog, click the appropriate step:



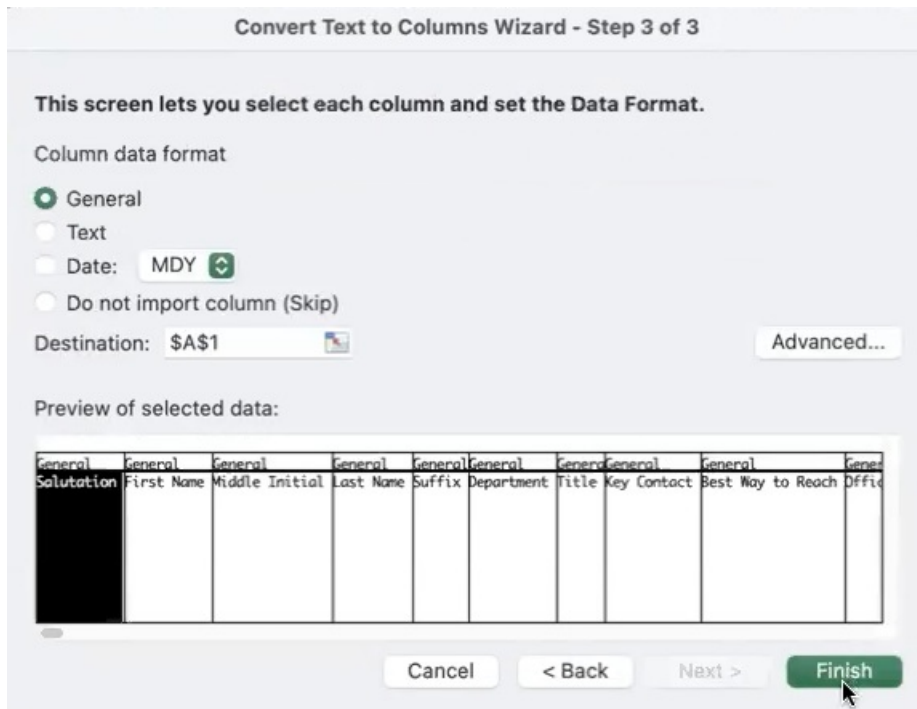
- o **Step 1** – Use if you do *not* already have a prepared spreadsheet. This will generate a .csv file that includes the currently displayed records. When you open the file, the relevant column headings will be contained in the first cell of the spreadsheet. To separate them and continue with the import 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**.



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



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



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.

- 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
First Name	Last Name
Middle Initial	Company Rec ID
Last 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

Import Action


Add new records
 Add remaining data as new records
 Update existing records in found set
 Update matching records in found set
 Don't import first record (contains field names)

- Scan the list of field names to verify that Source Fields are matched correctly to Target Fields, then click **Import**.
 - 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 [import validation errors](https://aace6.knowledgeowl.com/help/handling-import-validation-errors) (<https://aace6.knowledgeowl.com/help/handling-import-validation-errors>).
- At the confirmation message, review the number of imported records and click **OK**.
 - 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 [Quick Search](https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) (<https://aace6.knowledgeowl.com/help/using-the-quick-search-bar>) bar to locate the desired record.
2. On the record's line, click **Actions** ( <https://dyzz9obi78pm5.cloudfront.net/app/image/id/62d98561e7fe3e5cb051a2f4/n/actions-button.png>) > **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 [Quick Search](https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) (<https://aace6.knowledgeowl.com/help/using-the-quick-search-bar>) 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 [resolve the import validation issues](#)

<https://aace6.knowledgeowl.com/help/handling-import-validation-errors>.
