Mapping Import Fields by Hand

Last Modified on 06/23/2022 1:46 pm EDT

This guide explains how you can manually match data on a source spreadsheet to fields in aACE. It is intended for advanced users.

You can manually map field names between the source file and the destination database during the <u>data import process</u> (https://aace6.knowledgeowl.com/help/overview-of-importing-data</u>). This is required for tab-delimited data. The mapping task includes both matching source fields and target fields, as well as specifying fields that should *not* be imported. Be sure to review the entire list of records to import before going forward with the import process.

Manually Map Source Fields to Target Fields

During the <u>import process (https://aace6.knowledgeowl.com/help/importing-records</u>), the Specify Import Order dialog appears. Some of the Target Fields may be mis-aligned. Click that item's line, then type the correct Source Field in the Search field. Then click that field in the results list.

	Specify Import O	raer	
ecify the import order for e target fields.	SOURCE	Add	TARGET
> 1 of 6			
Use as Field Names	Source Fields	Mapping	Target Fields Custom Order
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
iubgroup	Subgroup 🧲	Import	Subgroup
iotes	Notes 🔵	Import	Notes
Office Addr Line 1	Office Addr Line 1	import 🥖	Billing Addr Line 1 v
Office Addr Line 2	Office Addr Line 2	Import	Office Addr 1 ine 2
Office Addr City	Office Addr City	Import	Office A Q office
Office Addr State	Office Addr State	Import	Office A
Iffice Addr Postal Code	Office Addr Postal Code	Import	Office A
ffice Addr Country	Office Addr Country	Import	Office A Office Addr Full
Office Addr Postal Format Name	Office Addr Postal Format Name	Import	Office A Office Addr Line 1
ffice Addr Mailing Label	Office Addr Mailing Label	Import	Office A Office Add Postal Format Rec ID
s Residential	Is Residential	Import	Is Resid Office Tax ID
thone	Phone (Import	Phone RES 1096 OfficeRecID
Iternate Phone	Alternate Phone	Import	Alternat Office Addr City
ax	Fax	Import	Fax Office Addr Country
hone Number Format	Phone Number Format	Import	Phone N Office Addr Line 2
mail	Email 🗧	Import	Email Office Addr Life 2
mail Format	Email Format	Import	Email Fc
Veb Address	Web Address	Import	Web Adi
Parent Company Abbr	Parent Company Abbr	Import	Parent C Office Addr Postal Format Name
leferral Company Abbr	Referral Company Abbr	Import	Referral Office Addr State
Import Options			
Character set for source file: Macintosh	0 D F	Perform the au	uto-enter options for fields during import
Field delimiter for source file:	E	xamples: serial r	number, creation timestamp, modification timestamp, lookups.
		reserve exter	mal container storage
Tab	0		

This may cause a previous Target Field to be marked as *not* for import. You must update that mapping also.

Omit Fields from the Import

You can designate a field that should *not* be imported. At the Specify Import Order dialog, click the Mapping field in the center column, then click the gray icon:

•	Specify Import Order	
Specify the import order for the target fields.	CompaniesDataMigration.xixx	0
Use as Field Names	Source Fields Mapping Target Fields Custom Orde	er 🖸
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 Subgroup	
Notes	Notes Don't import I otos	
Office Addr Line 1	pittine Adder I ine 1	
Office Addr Line 2 Office Addr City Office Addr State	Control Import this field Control Cont	
Office Addr Postal Code	Office Addr Postal Code	
Office Addr Country	Office Addr Country angent Office Addr Country	
Office Addr Mailion Label	Office Addr Potes romat name	
Import Options		
Character set for source file: Macintosh	Perform the auto-enter options for fields during import	0
Field delimiter for source file:	Examples: serial number, creation timestamp, modification timestamp, lookups.	
Tab	Preserve external container storage	
O Other:	Repeating Fields: Keep values in the original record	¢
?	Cancel	mpo