Mapping Import Fields by Hand

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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	Companiescatamigration. Ass		Content reare (contraines/bacile)
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
iroup	Group	Import	Group
ubgroup	Subgroup 🧲	Import	Subgroup
lotes	Notes 🔵	Import	Motes
Iffice Addr Line 1	Office Addr Line 1	import 🥖	Billing Addr Line 1 v
Iffice Addr Line 2	Office Addr Line 2	Import	Office Addr Line 2
Iffice Addr City	Office Addr City	Import	Office A Q office
ffice Addr State	Office Addr State	Import	Office A
ffice Addr Postal Code	Office Addr Postal Code	Import	Office A
ffice Addr Country	Office Addr Country	Import	Office A Office Add Full
ffice 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
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	Fanal
mail Format	Email Format	Import	Email Fg Office Addr Mailing Label
Veb Address	Web Address	Import	Web Adi
Parent Company Abbr	Parent Company Abbr	Import	Parent C Office Addr Postal Format Name
eferral Company Abbr	Referral Company Abbr	Import	Referral Office Addr State
Import Options			
Character set for source file: Macintosh			uto-enter options for fields during import
Field delimiter for source file:			number, creation timestamp, modification timestamp, lookups.
	0 F	Preserve exten	nal container storage
Tab			Keep values in the original record

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 he target fields.	CompaniesDataMigration.xisx	C
Use as Field Names	Source Fields Mapping Target Fields Custom O	der 🖸
Company Name	Company Name Import Company Name	
Company Abbr	Company Abbr Import Company Abbr	
Company Type	Company Type Import Company Type	
Group	Group Group	
Subgroup	Subgroup Subgroup	
Notes	Notes Don't Import V Lates	
Office Addr Line 1	pittine addr I ine 1 Rilling Addr I ine 1	
Office Addr Line 2 Office Addr City Office Addr State	C Import this field	
Office Addr Postal Code	Office Addr Postal Code Import Office Addr Postal Code	
Office Addr Country	Office Addr Country Office Addr Country	
Office Addr Postal Format Name	Office Addr Postal Format Name Import Office Addr Postal Format 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	C Preserve external container storage	
O Other:	Repeating Fields: Keep values in the original record	0
?	Cancel	Import