Data You Can Import into aACE

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This guide explains the types of data you can migrate from outside sources into your aACE system. It is intended for general users.

You can import both master data (https://aace6.knowledgeowl.com/help/importing-records) and transaction data (https://aace6.knowledgeowl.com/help/importing-transaction-data). Some data is only imported during the initial system setup (https://aace6.knowledgeowl.com/help/migrating-master-data-to-aace) (e.g. invoices, purchases, etc), while other data may be imported repeatedly to add new information (e.g. companies, contacts, or leads from purchased lead lists or collected in the aACE CRM mobile app (https://aace6.knowledgeowl.com/help/using-the-aace-crm-app)).

We recommend that you carefully prepare your data (https://aace6.knowledgeowl.com/help/preparing-a-data-filefor-importing) before beginning any import process.

Modules with Import Functionality

Master Data

- Companies
- Contacts
- Departments
- GL Accounts
- Leads

- Line Item Codes
 Tax Profiles
- Offices
- Postal Codes
- Rate Cards
- Task Groups
- Team Members
- Templates
- Time
- User Groups

Transaction Data

- Orders and Order Items
- Shipments and Shipping Log Items
- Invoices and Invoice Items
- Receipts and Receipt Items
- Purchase Orders and Purchase Order Items
- Purchases and Purchase Items
- Disbursements and Disbursement Items
- Inventory Adjustments and Inventory Adj Items
- GJ Entries and GJ Entry Items