

Mapping Import Fields by Hand

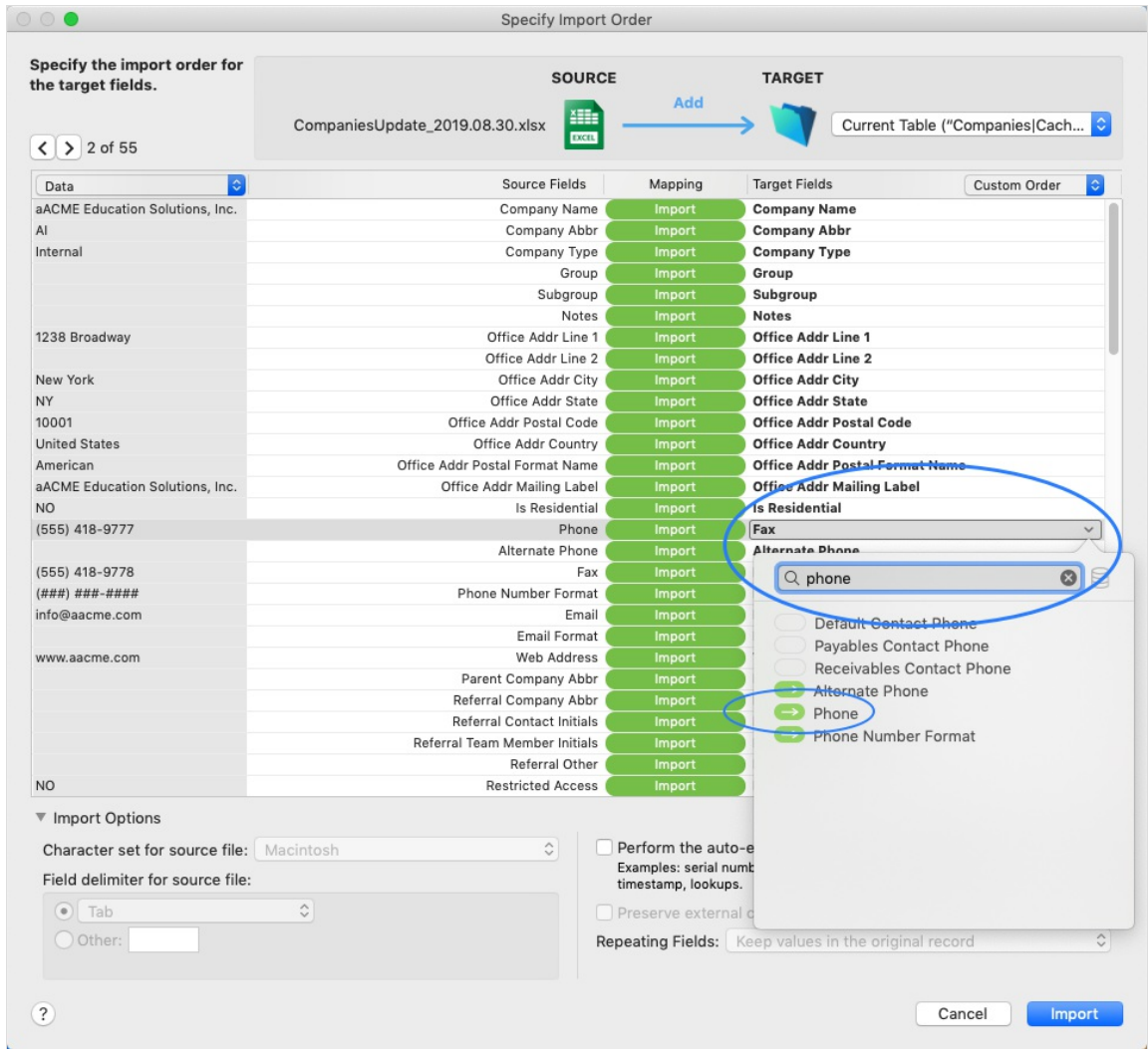
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This guide explains how you can manually match data on a source spreadsheet to fields in aACE. It is intended for advanced users.

You can manually map field names between the source file and the destination database during the data import process. This is required for tab-delimited data. The mapping task includes both matching source fields and target fields and also 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 [import process](https://aace5.knowledgeowl.com/help/importing-records) (<https://aace5.knowledgeowl.com/help/importing-records>), the Specify Import Order dialog appears. Some of the Target Fields may be mis-aligned. Click that item's line and type the correct Source Field in the Search field. Then click that field in the results list.



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

Omit Fields from the Import

At the Specify Import Order dialog, click the Mapping designation for a field that should *not* be imported. In the pop up, click the gray icon.

Specify Import Order

Specify the import order for the target fields.

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SOURCE: CompaniesUpdate_2019.08.30.xlsx → Add → TARGET: Current Table ("Companies|Cach...")

Data	Source Fields	Mapping	Target Fields
aACME Education Solutions, Inc.	Company Name	Import	Company Name
AI	Company Abbr	Import	Company Abbr
Internal	Company Type	Import	Company Type
	Group	Import	Group
	Subgroup	Import	Subgroup
	Notes	Import	Notes
1238 Broadway	Office Addr Line 1	Import	Office Addr Line 1
	Office Addr Line 2	Import	Office Addr Line 2
New York	Office Addr City	Import	Office Addr City
NY	Office Addr State	Import	Office Addr State
10001	Office Addr Postal Code	Import	Office Addr Postal Code
United States	Office Addr Country	Import	Office Addr Country
American	Office Addr Postal Format Name	Import	Office Addr Postal Format Name
aACME Education Solutions, Inc.	Office Addr Mailing Label	Import	Office Addr Mailing Label
NO	Is Residential	Import	Is Residential
(555) 418-9777	Phone	Import	Phone
	Alternate Phone	Import	Alternate Phone
(555) 418-9778	Fax	Import	Fax
(###) ###-####	Phone Number	<input checked="" type="checkbox"/> Import this field	
info@aacme.com	Email	<input type="checkbox"/> Don't import this field	
www.aacme.com	Web Address	Import	Web Address
	Parent Company Abbr	Import	Parent Company Abbr
	Referral Company Abbr	Import	Referral Company Abbr
	Referral Contact Initials	Import	Referral Contact Initials
	Referral Team Member Initials	Import	Referral Team Member Initials
	Referral Other	Import	Referral Other
NO	Restricted Access	Import	Restricted Access

▼ Import Options

Character set for source file: Macintosh

Field delimiter for source file: Tab Other:

Perform the auto-enter options for fields during import
Examples: serial number, creation timestamp, modification timestamp, lookups.

Preserve external container storage

Repeating Fields: Keep values in the original record

Cancel Import