# Avionté Standard Conversion Imports

https://avionteclassicsupport.zendesk.com/hc/en-us/articles/360045853793

# Overview

Occasionally, Avionté clients will want to import employees, customers, and contacts into the Core application after the initial data conversion has occurred and the client is live with Avionté. In such cases, the process for Avionté Standard Conversion Imports should be followed. The three types of Avionté Standard Conversion Imports are *Employee, Customer*, and *Contact*.

# Prerequisites

Prior to attempting the conversion, data must be formatted according to the appropriate spreadsheet download template available at the bottom of this article: Employee Standard Conversion Format, Customer Standard Conversion Format, or Contact Standard Conversion Format.

In addition, users must have permission for the Avionté Standard Employee Conversion, Avionté Standard Customer Conversion, and Avionté Standard Contact Conversion imports. Access to these imports is granted in *Admin Tools > Report > Advanced Query* by selecting the box under *IsDataFeed* for each conversion.

#### \*There is no duplicate checking when doing the Contact Import\*

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# Process

## **1. Import Process**

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E-Back Office	Process Batch View Report							Actions+ 🤗 New Batch	TypeName UserName	TypeValue avi-training.Cxr5
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- III Payroll	Importexport Datas Summary								Supplier	ABC
- 🚺 Invoice		Active Batches Import Export Batch Wizard							Environment	Production
- 🕢 Paycheck									SupportCode	MN0001
AP Check			Import Export Bate	h			X	1		
			Import Batch							
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Background check requests (6)						MN0001	Production	v:19.9.2.0 avi- training.Cxr5 1	2/13/2019	11:29 AM 📃

- 1. From the *Main Menu*, select **Import Export**.
- 2. Select Import Export Batch Wizard to open Import Export Batch.
- 3. Name the batch and provide a description.
- 4. In the *File* field, browse and upload the spreadsheet to be imported. Select the correct worksheet from the *WorkSheet* drop-down menu if the option appears.
- 5. From the Mapping Group drop-down, select Avionté Standard Front Office Import.
- 6. Select Avionté Standard Contact Conversion, Avionté Standard Customer Conversion, or Avionté Standard Employee Conversion as the Processing Method.
- 7. Enter a Conversion Name if prompted. This is essentially a notes field to indicate the purpose for the import.
- 8. Select **Finish** to create the new import batch.
- 9. Click Process Import/Export Batch. YOU WILL RECEIVE ERRORS. This is expected and will actually help us in the next steps!

## 2. Complete Standard Conversion Mapping

- 1. Navigate to *Admin Tools > Import Export Mapping*.
- 2. Open the **Mapping Type Data** tab.
- 3. Filter the Group Description column to Avionté Standard Front Office Import.
- 4. Click on the Mapping Type Names from the Avionté Standard Front Office Import Group. You will need to create the mapping for each of the MappingTypeNames that fall under Avionté Standard Front Office Import by selecting the type name and completing the Mapping Type Data fields.

Field	Description				
Source System Value	Terminology used in the spreadsheet yo attempted to import				
Recommended Value	If not pre-populated, leave blank.				
Mapped Value	Select the Avionté value from the drop- down menu.				

Mapping Type (	Group		N	Aapping Type Data		
Mapping Type	010.00			iapping type bata		
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Manufa - Tana Dala	Contact Status		Contact Status			
Mapping Type Data Source System Value		Recommended Value		Mapped Value		
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Values from your spreadsheet				Source	value the System anslates to	
				E	xport To Excel Sav	/e

- 5. Select **Save** to complete the mapping.
- 6. Repeat steps 4 & 5 for each Mapping Type Name.
- 7. Close Admin Tools.

## 3. Process the Import

- 1. Return to Import/Export from the Main Menu in Avionté.
- 2. From the ImportExport Home page, select **Process Import Export Batch.**

× 2 =					Avionte   ImportExport
		Search Set Ba	atch Name	Search Criteria	
Main Menu	Start Page Home				
- Back Office Time Entry		w Report			
Payroll	ImportExport Batch Su Batch ID	ummary 88	Shortcuts		
	Description	Customer Import	Active Batches	Import Export Batch Wizard	
	Status	Processing			
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	Created Date	Dec 13 2019 12:13PM			
Weekly Process			Actions Process Import Export Batch	View Report	

- 3. If an error message appears, resolve the error message and select **Process import Export Batch** again.
- 4. Wait for a message stating "The import batch has been processed successfully" to appear.
- 5. Select **OK** to close the window.

## 4. Required Fields for import

Below is a list of the required fields for Importing:

Contact, Customer or Employee

Field Name	Contact	Customer	Employee
AttnTo		Х	
Branch	Х	Х	Х
Cell	Х		Х
City	Х	Х	Х
ContactID	Х		
ContactRole	Х		
Country		Х	Х
CustomerID		Х	
CustomerName		Х	
DateEntered			Х
DateOfBirth			Х
DepartmentName	Х	Х	
Email	Х		Х
EmployeeID			Х
EnteredBy	Х	Х	Х
EnteredDate	Х	Х	
Fax	Х	Х	
FederalExemptions			Х
FirstName	Х		Х
HomePhone			Х
LastName	Х		Х
Main Number	Х		
MainPhone		Х	
MaritalStatus			Х
MiddleName	Х		Х
ParentID		Х	
Race			Х
Sex			Х
SSN			Х
State	Х	Х	Х
StateExemptions			Х
Status	Х	Х	Х
Street1	Х	Х	Х
Street2	Х	Х	Х
Title	Х		
WebSite		Х	
WorkSite_City		Х	
WorkSite_Country		Х	
WorkSite_State		Х	
WorkSite_Street1		Х	
WorkSiteStreet2		Х	
ZipCode	Х	Х	Х

## 5. Attachments / Templates

Contact\_Standard\_Conversion\_Format.xlsx

https://avionteclassicsupport.zendesk.com/hc/enus/article attachments/360064752793/Contact Standard Conversion Format.xlsx

Customer\_Standard\_Conversion\_Format.xlsx

https://avionteclassicsupport.zendesk.com/hc/enus/article\_attachments/360063746494/Customer\_Standard\_Conversion\_Format.xlsx

Employee\_Standard\_Conversion\_Format.xlsx

https://avionteclassicsupport.zendesk.com/hc/enus/article\_attachments/360063746534/Employee\_Standard\_Conversion\_Format.xlsx