Avionté Standard Conversion Imports

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

Section 1: Import Process
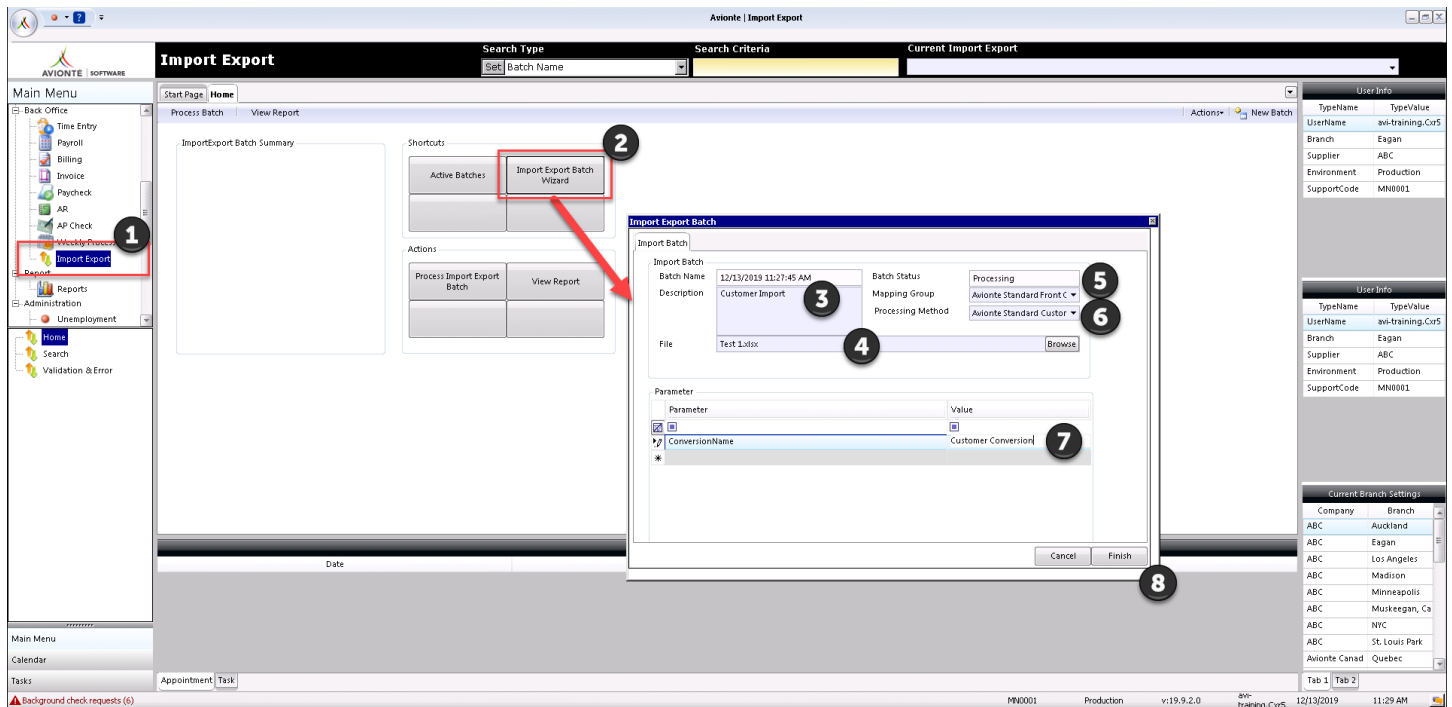
Section 2: Complete Standard Conversion Mapping

Section 3: Process the Import

Section 4: Required Fields for import

Section 5: Attachments / Templates

Process

1. Import Process

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 you attempted to import
Recommended Value	If not pre-populated, leave blank.
Mapped Value	Select the Avionté value from the drop-down menu.

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.**
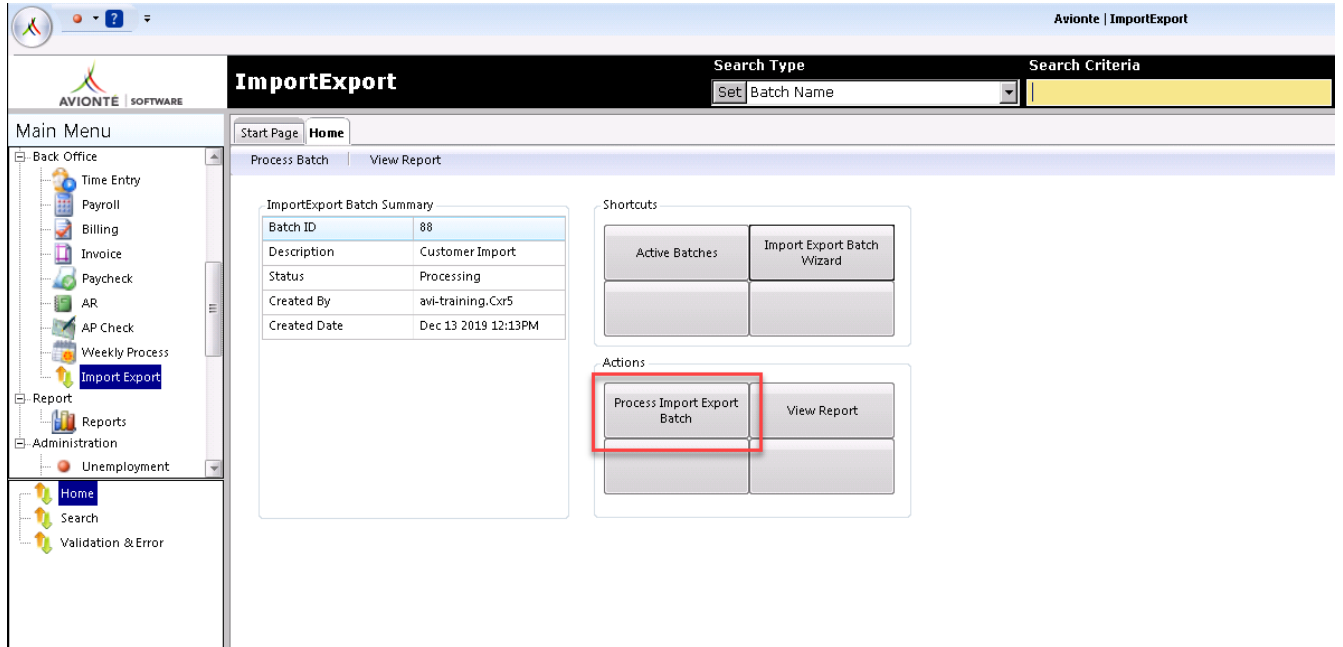
3. If an error message appears, resolve the error message and select **Process import Export Batch** again.

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

5. Attachments / Templates

Contact_Standard_Conversion_Format.xlsx

https://avionteclassicsupport.zendesk.com/hc/en-us/article_attachments/360064752793/Contact_Standard_Conversion_Format.xlsx

Customer_Standard_Conversion_Format.xlsx

https://avionteclassicsupport.zendesk.com/hc/en-us/article_attachments/360063746494/Customer_Standard_Conversion_Format.xlsx

Employee_Standard_Conversion_Format.xlsx

https://avionteclassicsupport.zendesk.com/hc/en-us/article_attachments/360063746534/Employee_Standard_Conversion_Format.xlsx