

## Importing Service History

Acowin has the ability to import service history from another service management program. The history data must first be exported into a format that can be opened by Microsoft Excel. From Excel, the history can be saved as a Tab-Delimited Text file, then imported into Acowin.

### Importing Service History From Third-Party Programs

1. Export the data from the other service management program, into any of the many formats that can be read by Microsoft Excel. Formats such as Comma-Separated Values (.csv) or Excel's native .xls format are ideal. Any format that uses a "delimiter" character to separate the fields – commas, tabs, etc. – should be fairly easy to work with. Be sure your exported data includes crucial information such as:

- The name of the work site
- The address where the work was performed (up to three separate fields for each address)
- The date when each service call was performed
- The ticket or work order number (which Acowin would refer to as a Call Slip Number)
- The invoice number, date, and amount, if the work was billed out

The History import includes up to 15 "notes" fields, which can contain any sort of information that doesn't fit into the fixed Acowin fields. An excellent use for some of the notes would be saving the verbal description of the work that was performed.

2. Once the data has been exported, open it with Microsoft Excel. Take this opportunity to remove unnecessary columns, and generally clean up the service history data, if you feel it is necessary.

3. Save the data from Microsoft Excel, using the **File >>Save As** command. Use the **Save As Type** pull-down menu to select the option called **Text (Tab-Delimited)**. Say Yes when Excel asks if you want to save the file in the format you have requested. This will create the Tab-Delimited Text file needed by the Acowin Data Conversion utility. If you are not already working on the Acowin server computer, please copy this Tab-Delimited Text file to the Acowin server before continuing.

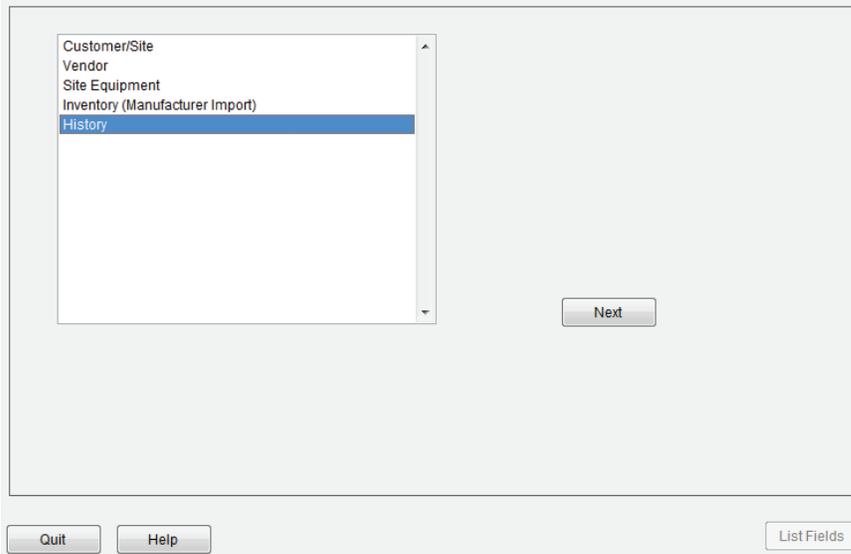
4. On the Acowin server, click **Start / Programs / Acowin / Quick Launch**.



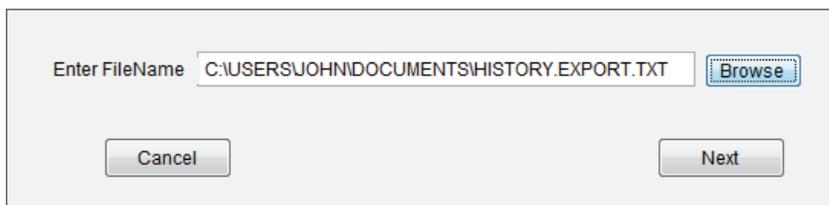
5. From the Quick Launch menu, choose **Data Conversion**.

6. Log into the Data Conversion program, the same way you would log into Acowin. Use the same name and password you always use for Acowin. Be sure to select the correct company!

7. After you log in, you will see a list of data that can be converted into Acowin. Choose the **History** option and click the **Next** button.



8. A pop-up window will appear, asking for the location of the data you wish to import. Click the **Browse** button, then locate and select the Tab-Delimited Text file you created in step 3.



9. Next you'll see the Field Linking screen, which lists Acowin fields on the left, and your imported data on the right. Select an Acowin field, then click on the imported data field that should match it, and click the **Link** button. The number of the imported data field will appear next to the Acowin field, to show they are linked. For example, you would select the Acowin Site Name, click on the field from your imported data that includes the Site Name, and click Link.

You don't have to use all of the fields on either side of the screen – try to link as many of the Acowin fields as possible. Anything that doesn't fit into the clearly named Acowin fields can be linked to one of the 15 **Notes** fields which are available.

If the first record in your imported data contains the names of the fields, instead of meaningful data, be sure to place a check mark in the **Skip Header Record** box at the bottom of the screen.

When you have linked as many Acowin fields as you can, click the **Next** button.



history from the History screen of the Customer/Site File, using the **Imported History** button.

If you don't use the Original Customer ID field to link the imported History to imported Sites, you can still link the Imported History records to Sites manually. This is done with the Browse Imported History screen in Customer Utilities, as described below. Manual linking would also be necessary if Customers and Sites were brought into Acowin from QuickBooks with the QB Setup Wizard, since QuickBooks does not provide any sort of Original Customer ID that you could use to automatically link imported History.

### **Browsing Imported History and Linking it to Existing Sites**

To review the history you have imported into Acowin with the Data Conversion tool, click the Utilities button in the Customer area of the Acowin Main Menu, then choose **Browse Imported History**. The Customer Utilities menu is pictured below.



The Imported History screen is pictured below. You can use the **Search By** pull-down menu to select a method for searching through the history records, choosing from any of the following methods. After you type some search text, click the **Search** button to locate the history. Remember that names and addresses will look exactly as they did when you imported the history – if the names were entered as “Last Name, First Name” in your old accounting system, that is how they will appear.

- Site Name
- Address
- Phone
- Invoice Number
- Work Order Number

Browse Imported History

Search By Site Name on t Search

<input type="checkbox"/>	Site Name	Address	Phone	Call Date	Work Order #	Invoice #
<input type="checkbox"/>	Tate, Wilson	293 Volgard St.	(239)401-9876	10/12/08	905	
<input type="checkbox"/>	Tate, Wilson	293 Volgard St.	(239)401-9876	12/01/08	1098	5098

Site #: Site Name: Associate Selected Records

You can **double-click** on any History record to view its full details, as seen below. It is possible to modify the History records from this detail window. You could add more text to the Notes, for example. If you make any changes, be sure to click **OK** to close the detail window. If you want to close the screen without making any changes, you can click **Cancel**.

History Record

Name: Tate, Wilson Orig Cust #: Invoice Amount:

Address: 293 Volgard St. Call Date: 10/12/2008 Invoice #:

Ft. Myers, FL 33908 Work Order #: 905 Invoice Date: / /

Phone: (239)401-9876 Dispatch Date: / /

Contact: Lead Tech: BOB

Total Hours:

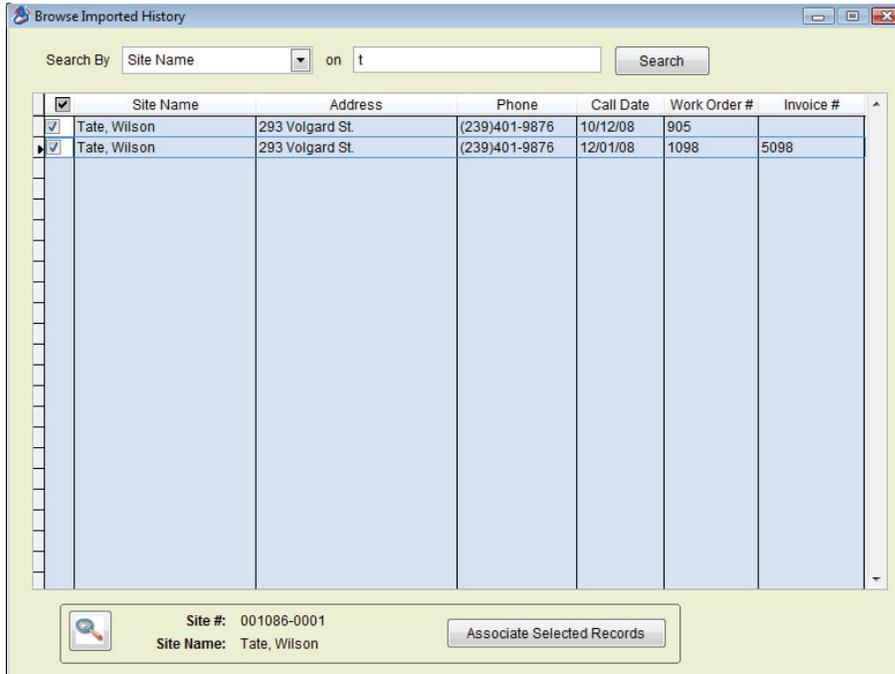
Notes

checked unit operation, adjusted controls, changed filters"

Site #: Site Name: Disassociate Cancel Ok

At the bottom of the Imported History screen is an area that can be used to link Imported History records to existing Sites in your Customer/Site File. To create such a link, check off all the records on the Browse Imported History screen that you wish to associate with

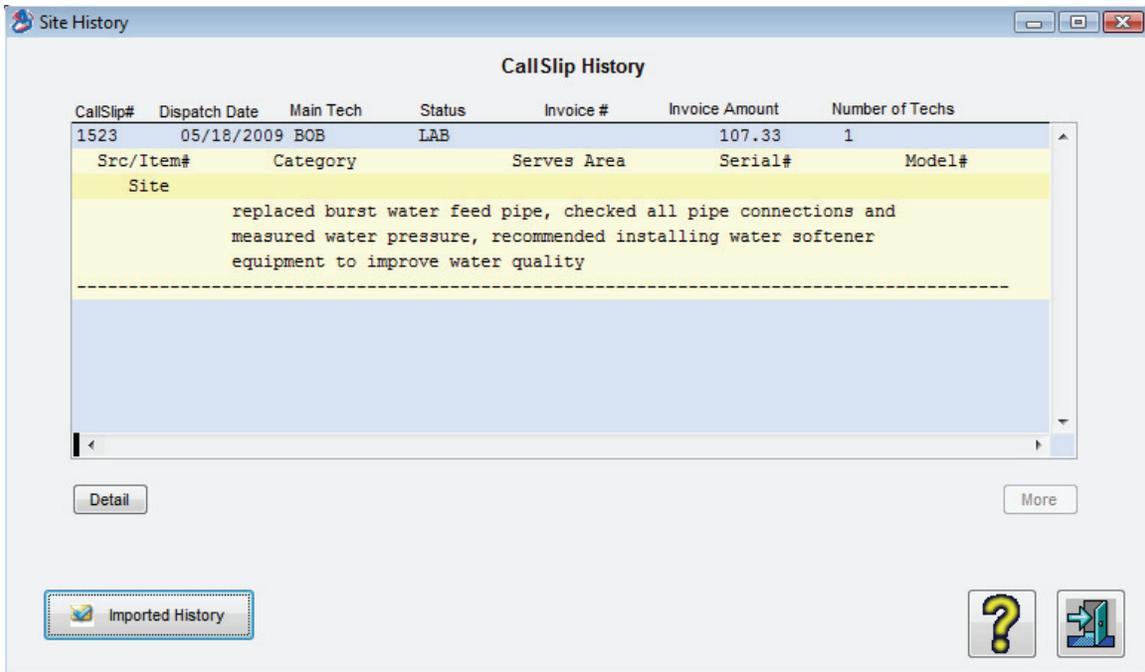
a particular existing Site. The check box at the very top of the screen can be used to check off every record displayed in the Browse Imported History list at once. After the desired History records are checked, click the Magnifying Glass button, then locate and select the proper Site. Click the **Associate Selected Records** button to complete the procedure.



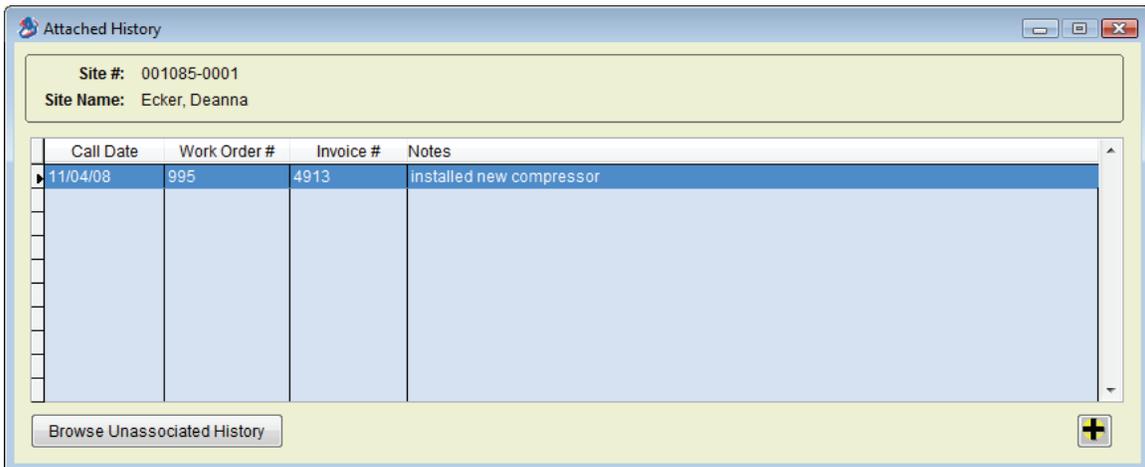
### **Viewing History Attached to Sites**

After you have associated Imported History with a Site, you will be able to view it with the **Imported History** button on the History screen, which can be reached from the Customer/Site File or Call Slips. Linked records will disappear from the Browse Imported History screen of Customer Utilities, since this screen only displays Imported History that has **not** been linked to a particular Site.

Below is an image of the History screen. You can see the Imported History button at the bottom left corner of the screen.



Clicking the Imported History button opens a list of the History records associated with this Site.



You can **double-click** an item in the History list to view its details.

History Record

Name	Ecker, Deanna	Orig Cust #		Invoice Amount	814.99
Address	109 N. Elm Street	Call Date	11/04/2008	Invoice #	4913
		Work Order #	995	Invoice Date	11/12/2008
	Middlefield, CA 94482			Dispatch Date	/ /
Phone	(415)555-7896			Lead Tech	JIM
Contact				Total Hours	

Notes

installed new compressor

Site #: 001085-0001  
Site Name: Ecker, Deanna

Disassociate

Cancel Ok

If you decide this particular History record has been attached to the wrong Site, you can click the **Disassociate** button. This will remove the History record from the list for this work Site, and return it to the pool of unattached History you can view from the Customer Utilities menu.