

ACOWIN DATA CONVERSION FIELD LISTS

Following are lists of fields that can be imported into Acowin from outside sources. The incoming data must be converted into a **Tab-delimited Text** file, in order to be loaded into the Acowin Data Conversion program. The easiest way to get the data into this format is to open it with Microsoft Excel, then use the File / Save As command, and select “Text (Tab-delimited)” as the file type. Essential fields will be marked as **Mandatory** in the tables below.

Customer / Site Fields

Note that “Customer” refers to the billing name and address for each location, while “Site” is the actual work site name and address. If your imported data did not include separate fields for Customer and Site, you can link the same incoming fields to both the Customer and Site fields in Acowin.

If you plan to import Equipment or History data, it is *very important* to link a code from the imported data to the Original Customer Number in Acowin. This code can be up to 10 characters long, including letters and numbers. The Original Customer Number must be *unique* for each Site. Every unit of Equipment for a given site must include the **same** Unique Customer Number, which must also be imported into Acowin. For example, if your imported data uses “1002” as the Unique Customer Number for a particular work Site, every unit of Equipment for that Site must also have “1002” as its Unique Customer Number. Acowin will use the Unique Customer Number to link Equipment to the proper work Site. The same is true of History information – every imported History record should include the Original Customer Number of the applicable Site.

Field Name	Notes
Unique Customer ID	
Orig Cust #	Mandatory if you plan to import equipment
Customer Company Name	Mandatory for commercial customers
Customer Foreign Flag	
Customer Address 1	Mandatory
Customer Address 2	
Customer (Foreign)	
Customer City	Mandatory if imported data uses separate fields
Customer State	... for City, State, and Zip Code
Customer Zipcode	... or use the City/State/Zip field if appropriate
Customer City/State/Zip	Use if CSZ are contained in one field
Customer First Name	Mandatory for residential customers
Customer Last Name	Mandatory for residential customers
Customer Contact Title	

Customer Contact Name	
Customer Website	
Customer Email	Important if you plan to send email from Acowin
Customer Phone1	Strongly recommended you link at least one Phone#
Customer Fax	
Customer Phone2	
Customer Phone3	
Customer Phone1 Ext	The "Ext" fields refer to Extension numbers
Customer Fax Ext	
Customer Phone2 Ext	
Customer Phone3 Ext	
Customer Type	
Customer Use Company Name Flag	
Site Company Name	Mandatory for commercial Sites
Site Foreign Flag	
Site Address 1	Mandatory
Site Address 2	
Site (Foreign)	
Site City	Use these fields if CSZ are in separate fields
Site State	
Site Zipcode	
Site City/State/Zip	Use if CSZ is contained in one field
Site First Name	Mandatory for residential customers
Site Last Name	Mandatory for residential customers
Site Contact Title	
Site Contact Name	
Site Website	
Site Email	
Site Phone1	Recommended you link at least one Site Phone #
Site Fax	
Site Phone2	
Site Phone3	
Site Phone1 Ext	
Site Fax Ext	

Site Phone2 Ext	
Site Phone3 Ext	
Site Type	
Site Use Company Name Flag	
Site Tax Region	
Site Rate Type	
Site Notes 1	Use Notes for any additional information
Site Notes 2	
Site Notes 3	
Site Notes 4	

Vendor Fields

Note: QuickBooks users should not use the Data Conversion tool to import Vendors. QuickBooks vendors are imported with a special option on the Accounting Utilities menu within Acowin, after the QB Wizard for A/P has been completed.

Field Name	Notes
Vendor ID	
Name	Mandatory
Address 1	
Address 2	
City	Use these fields if CSZ are separate fields in imported data
State	
Zipcode	
City/State/Zip	Use this field if CSZ are one field in imported data
Phone	
Fax	
WebSite	
Email	
SalesPerson	
Contact	
Account No	
Balance	
Credit Limit	

Equipment Fields

Reminder: your Equipment records should include a Unique Customer Number, which must be the **same** as the Unique Customer Number imported for the Site which owns the Equipment.

If you link incoming data to the Category, Brand, or Equipment Type fields, you **must** add the exact same items to the Equipment Category, Brand, and Equipment Type files in Acowin. You can find these files in Setup / Subsystems. For example, if you import a Brand called “Trane” through Data Conversion, you must be sure there is an entry for “Trane” in Setup / Subsystems / Brands. You must add these items to the Acowin setup files **first**, before you perform the Data Conversion. If you don’t set up the Categories, Brands, and Equipment Types correctly in Acowin, the Data Conversion will ignore these fields and leave them *blank* in the Acowin Equipment File.

Field Name	Notes
Orig Cust #	Mandatory, must be the same as Orig Cust# for Site
Category code	
Brand code	
Equipment Type code	Defines the type of equipment (air handler, furnace, etc.)
Model	Highly recommended you link a Model Number
Serial No	Not truly mandatory but <i>strongly</i> recommended
Model Year	Four-digit year, optional
Date Installed	Use the mmddyyyy format, i.e. 08122007 for 8/12/2007
Service Area	Part of the building serviced by this unit of equipment
Location	Exact location of the equipment unit (attic, closet, etc.)
Notes #1	Link any additional information to the Notes fields
Notes #2	
Notes #3	
Notes #4	

Inventory Fields

The crucial fields for Inventory conversions are Key Code, Description, List Cost, and Average Cost. The Key Code is your company’s internal part number for each item. Key Codes can be up to 15 characters long, including letters and numbers. It’s best to keep the Key Codes as short as possible, to make them easier to read, write, and remember. Most major parts supply houses have part numbers that are only six to eight characters long. If your Inventory data is converted from a catalog supplied by your preferred vendor, you should be able to use the vendor’s part numbers as your Key Codes.

List Cost is the “book price” of each item, and will be used to calculate a final sale price to the customer. For example, a part with a List Cost of \$1.00 might be tripled by your Rate Schedule, and sold for \$3.00. Actual Cost is the true cost you pay for each item, and is recalculated automatically by Acowin as you receive shipments with varying unit costs. If your imported data does not distinguish between List Cost and Actual Cost, you can link the same cost from the incoming data to both of these fields in Acowin.

Field Name	Notes
KeyCode	Mandatory, up to 15 alphanumeric characters
Description	Mandatory
Model	
Part Number	
List Cost	Mandatory
Sell Price	
Last Cost	
Average Cost	Mandatory, use same field as List Cost if necessary
Notes Line 1	Additional information can be linked to Notes fields
Notes Line 2	
Qty on Hand (Optional)	Only link if incoming data has accurate quantity in stock
Optimum Qty (Optional)	Optimum stock level for re-order purposes

History Data Conversion Fields

These fields can be linked if you export service history from your legacy system. As with the other Data Conversion options, your legacy data must be saved as a Tab-Delimited Text file.

Each History record should include the *same* Original Customer Number as the applicable Site. For example, if you have a customer named Joe Smith, who was imported with Original Customer Number “1002”, then every History record for Joe Smith should also include Original Customer Number 1002. If you import History without Original Customer Numbers, it will appear in Acowin under the Customer Utilities Menu, using the Browse Imported History menu option. There you will find all of the “unassociated” History you have imported, searchable by Site Name, Phone Number, Site Address, Invoice Number, or Work Order Number. From the Browse Imported History screen, you can manually link History records to the correct Acowin Site, one record at a time. History linked in this manner will disappear from the Browse Imported History screen, and reappear on the History screen of the Customer/Site File.

Field Name	Source Field
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Site ID	
Orig Cust #	Use same value as linked in Customer/Site File, to link History
Site Name	Mandatory
Address1	Mandatory
Address2	
Address3	Mandatory, use for City/State/Zip
Phone	
Contact	
Call Date	Date the service call originated
Work Order #	Ticket number of the original work order
Invoice Amount	
Invoice Date	Date which appeared on the printed invoice
Invoice #	
Dispatched	Date the work was actually performed
Lead Tech	Name of the primary technician who performed the work
Total Hours	Total number of hours worked on the call
Notes #1	Use the Notes fields for service history, equipment specs, etc.
Notes #2	
Notes #3	
Notes #4	
Notes #5	
Notes #6	
Notes #7	
Notes #8	
Notes #9	
Notes #10	
Notes #11	
Notes #12	
Notes #13	
Notes #14	
Notes #15	