

Implementations - SedonaOffice Data Conversion Process

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The following steps represent the stages of the Data Conversion process for SedonaOffice. This process utilizes SQL Management Studio, Microsoft Access, Microsoft Excel and the SedonaOffice Customer Import Tool.

*For a visual representation of the SedonaOffice Data Conversion Process, please visit [SedonaOffice Data Conversion Map](#).

STEP #	STEP	DESCRIPTION	COMPLETED
1	Review MasterTemplate	Review the entirety of the MasterTemplate and let the PM team/Customer know if there is any outstanding or missing source data.	
2	Import Source Data	Use whatever method necessary to import the customer's data source into SQL. For certain data source types, like MicroKey, this may require a 3rd party application such as SQL Anywhere	
3	Complete SedonaOffice CustomersToAccess Script	Open the CustomersToAccess script in SSMS. The CustomersToAccess script contains the framework for creating SedonaOffice Customers/BillTo, Sites, Systems and Recurring information. Using the MasterTemplate, fill in all required or requested data fields. NOTES: 1) You must properly index the customer Sites, Systems and RMR for them to be imported later. 2) You must fill in all required fields for import (if customer doesn't have RMR, leave the entire RMR section blank)	
4	Export to SingleFileConversion5794Template.xls	Within the SedonaCustomerImport folder, open file SingleFileConversion5794Template.xls. Within the spreadsheet, select all and change the format to 'Text'. Then copy, without headers, all of the customer information that results from the CustomersToAccess script. Once in excel, replace any null values with blanks and save this file within your customer's folder.	

- 5 Import into
 SingleFileConversion5794.mdb

Within the SedonaCustomerImport folder, open Access database SingleFileConversion5794.mdb. Once opened, import the SingleFileConversion5794Template.xls file, created in the previous step, into Access table 'zzData'. In the 'All Access Objects' pane, run the necessary macros to build the customer information based on the zzData table. For this step start with '00 Fix Indexes' and move through all of the necessary macros through '99 FixStatus'. Once this is complete you can go into the CustInfo, SiteInfo, SystemInfo, RecurringInfo or TotalRecurring tables to check that these macros have run correctly and your data is populated. Once the framework of a customer is completed (BillTo, Site, System and RMR), you can begin working on other requested data pieces (Invoices/Credits, Notes, Master Accounts, Parts, etc.). To do this, open the relevant table in the Access database. You will need to populate the columns (not all are required) in the table. To do this, use the additional SQL queries at the bottom of the CustomersToAccess script to pull all necessary information. Once you have verified your query, import this information into your Access Database via Copy and Paste or by importing an excel spreadsheet.
- 6 Run Access Queries

Save Access Database as 'Access 2002-2003 Database (*.mdb)'. Transfer this database to your staging environment.
- 7 Create Remaining Information

Restore the customer's database to the staging environment. Once restored, remove and rebuild SedonaUser and SedonaReports users with their proper permission group.
- 8 Export Access Database
- 9 Restore Customer Database

- Within the SedonaCustomerImport folder, open Conversion5794.exe. This is the application that will insert our data into the customer's database. Upon opening, the application will ask for the location of the Access database and the Company that the data is to be inserted into. Before running the conversion, there is one final screen that asks specifics about the import. You want to select the GL Accounts to be used and the 'RMR is taxable', 'Masters already exist' or 'Has Invoices' checkbox if applicable. Within the SedonaCustomerImport folder, there are 4 logs. Check these logs to verify there were no conversion errors that prevented any of the data from being imported. Take note of the entities created during the conversion. Minor changes can be tracked and made directly within the Access database. Larger changes will require fixing the script at step #3 and returning through the steps. When completed, ensure the customer has access to the conversion. If on-premises, add the customer manually to the customer's Company table. If Cloud, give the specifics of the conversion to SedonaOffice IT and allow them to append the Company table.
- 10 Run Conversion5794.exe
 - 11 Check Logs
 - 12 Make Updates
 - 13 Completion

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