Lawn Monkey™
SOFTWARE

Importing Center

This manual is intended to help Lawn Monkey 2001 (LM) users import client information from other software programs. The scenarios provided should be used as guidelines to familiarize you with the importing process. It is important to realize that although the scenarios provided cover the major issues that most users will encounter, they do not cover every imaginable step that could be involved in your particular import process.

Before, reading this manual, we strongly recommend that you read the *LM User's Manual* p.p. *35-42*. This will familiarize you with the various fields used in LM's client information screen. Being aware of the names, and the information contained in each of these fields will help ensure a quick and error-free import. It is also strongly recommended that you read this manual through in its entirety before beginning your actual importing of data.

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Creating an Import File

The process required to create an *Import File* that can be imported into LM is detailed below. Of the two scenarios provided, choose the one that most accurately describes your situation and follow the pertinent steps.

Scenario 1

Your client information is currently entered a *QuickBooks* accounting package. You would like to create an export file from your *QuickBooks* information that can be entered into LM 2001.

To create an export file from the *QuickBooks* information:

1) If you are using *QuickBooks 99* or older: Click on **File > Export**. Continue at *#3*.
2) If you are using *QuickBooks 2000*: Click on **File > Utility > Export**. Continue at *#3*.
3) The *Export* screen will appear. Click on the box to the left of *Customer List* so that a check appears in the box.
4) Click on **Ok**.
5) Click on the drop down list in the *Save In* box and select *Desktop*.
6) Enter *LM Import* into the *File Name* box.
7) Click on **Save**.
8) Click on **Ok**.
9) The export file *LM Import* has now been created and placed on your *Desktop*.

Scenario 2

Your client information is currently entered in a *FoxPro* program. You would like to create an export file from your *FoxPro* information that can be entered into LM 2001.

To create an export file from the *FoxPro* information:

1) Open your *Microsoft Excel*.
2) Click on **File > Open**.
3) Click on the drop down list in the *Files of type:* box and select *All Files*.
4) Click on the drop down list in the *Look in:* box and select *(C:)*.

5) Click on the folder with the name of your program to the right of it. For example, if the name of your *FoxPro* program is *Lawn Basics*, click on the file named *Lawn Basics*.
6) Click on the *Maindbf* folder.
7) Click on the *Customer.dbf* file.
8) Your customer information will now appear in *Microsoft Excel*.
9) Click on **File > Save as…**
10) Click on the drop down list in the *Save as type:* box and select *Text (Tab delimited)*.
11) Enter *LM Import* into the *File name:* box.
12) Click on the drop-down list in the *Save in:* box and select *Desktop*.
13) Click on **Save**.
14) The export file *LM Import* has now been created and placed on your *Desktop*.

Importing the Newly Created File into LM 2001

The process required to import the newly created file is detailed in the scenarios below. The scenarios provided are applicable to imports from all software packages.

Remember: These scenarios are guidelines intended to demonstrate the process of importing into LM 2001. Due to the fact that not all imports are identical, some of the scenarios may not apply to your situation.

Scenario 1

You have created an export file that contains all of your client information. You would like to import that file into LM 2001's spreadsheet so that you can eventually have that information entered into LM 2001.

To get the export file into LM 2001:

1) Start LM 2001.
2) Click on **Start** in the *Login Form*.
3) Click on **File > New Company Database**.
4) Enter *Customer Database* into the *File name:* box.
5) Click on **Ok**.
6) Click on **Start** in the *Login Form*.
7) Click on **File > Import > Customer Lists from Other Software Packages…**
8) Click on the drop down list in the *Look in:* box and select *Desktop*.
9) Click on *LM Import*.
10) Click on **Open**. The *Lawn Monkey Import Center* screen will appear.
11) **NOTE:** If you are importing from a *QuickBooks* program, there may be some extraneous information in the columns shown. Identify the row of information that contains column headings such as *!CUST*, *NAME*, *REFNAME*, *TIMESTAMP*, *BADDR1*. Delete all of the information above this row. To do this, click on the gray cell to the left of the row immediately above the column heading *!CUST*. Next, scroll to the top of the *Lawn Monkey Import Center* screen. Hold down the **Shift** key and click on the gray cell to the left of the first row of information shown. Click on **Remove** at the bottom of the screen.

Now that your client information has been entered into LM 2001's spreadsheet, you would like to match, or "map", the information from your *QuickBooks* or *FoxPro* program to the information in LM 2001. For example, there may be a column of information from *QuickBooks* that is titled *Cust Num* that contains all of your customer phone numbers. In LM 2001, customer phone numbers are kept in a column titled *Phone1*. Therefore, you have to tell LM 2001 to place the information from *QuickBook's* column *Cust Num* into LM 2001's column *Phone1*. This process is called "mapping".

You would like to "map" all of the information from your *QuickBooks* or *FoxPro* program to LM 2001. You notice that there is a column labeled *PHONE1* that contains your client's phone numbers. You figure that this would be a safe place to start your "mapping". You would like to find the column in LM 2001 that contains client's phone numbers and map *PHONE1* to that column.

In addition to your client's phone numbers, you notice a column labeled *BADDR1* that contains your client's names. You remember from reading *LM 2001 User's Manual* that LM 2001 refers to client's names as *Full Name*. Therefore, you would like to map the *BADDR1* column to LM 2001's *Full Name* column so that your client's names can be entered into LM 2001 correctly.

To map *PHONE1* to an appropriate column in LM 2001:

1) Click on one of the phone numbers listed under the heading *PHONE1*.
2) Click on **Map**.
3) Scroll down the *Mapping Columns to Fields* page until you see *Phone 1*.
4) Click on *Phone 1*.
5) Click on **Apply**.
6) The column *PHONE1* will be highlighted to indicate that it has been mapped to a column in LM 2001.

To map the column *BADDR1* to the LM 2001 column *Full Name*:

1) Click on one of the names listed under the heading *BADDR1*.
2) Click on **Map**.
3) Scroll down the *Mapping Columns to Fields* page until you see *Full Name*.

4)   Click on *Full Name*.
5)   Click on **Apply**.
6)   The column *BADDR1* will be highlighted to indicate that it has been mapped to a column in LM 2001.

Scenario 3

You would like to enter the city, state and zip code of each of your clients into LM 2001. However, there appears to be a little bit of a setback. The program from which you exported held all of this information in one column labeled *BADDR3*. LM 2001 holds city and state information in one column labeled *Billing City, State* and zip code information in a separate column labeled *Billing Zip Code*. First, you would like to separate the city and state information from the zip code information. Second, you would like to map the city and state information to LM's *Billing City, State* and map the zip code information to LM's *Billing Zip Code*.

To separate the city and state information in the *BADDR3* column from the zip code information in that column:

1)   Scroll through the columns in the spreadsheet, and identify one that has no information entered.
2)   Click on one of the cells under the column heading *BADDR3*.
3)   Click on **Tools > Copy this Column to Another**.
4)   Enter the name of the blank column into the box provided. For example, if the name of the column was *col52*, enter *col52* into the box provided.
5)   Click on one of the city, state and zip code entries in *col52*.
6)   Click on **Tools > Remove Non-numeric Characters**. Only the zip code information will remain in *col52*.
7)   Click on one of the city, state and zip code entries in the *BADDR3* column.
8)   Click on **Tools > Remove Numeric Characters**. Only the city and state information will remain in the *BADDR3* column.

To map the city and state information in column *BADDR3* to a column in LM 2001:

1)   Click on one of the city and state entries in column *BADDR3*.
2)   Click on **Map**.
3)   Scroll through the *Mapping Columns to Fields* screen until you see *Billing City, State*.

4)   Click on *Billing City, State*.

5)   Click on **Apply**.

To map the zip code information in *col52* to a column in LM 2001:

1)   Click on one of the zip code entries in *col52*.

2)   Click on **Map**.

3)   Scroll through the *Mapping Columns to Fields* screen until you see *Billing Zip Code*.

4)   Click on *Billing Zip Code*.

5)   Click on **Apply**.

Scenario 4

You have almost mapped all of your customer information to columns in LM 2001 when you come across a column labeled *REFNUM*. You know that this column contains your customer number information. You believe that *REFNUM* should be mapped to a column in LM 2001 labeled *Sort Code*, so you want to map these two columns together. Once you do this you would like to take a break and save the mapping you have done. You plan on coming back to finish in about an hour.

To map the column *REFNUM* to LM 2001's *Sort Code* column:

1)   Click on one of the entries in the column *REFNUM*.

2)   Click on **Map**.

3)   Scroll through the *Mapping Columns to Fields* screen until you see *Sort Code*.

4)   Click on *Sort Code*.

5)   Click on **Apply**.

To save the mapping information so that you can return to it later:

1)   Click on **Close (Esc)**.

2)   The information will be automatically saved.

An hour and a half passed since you last worked on the mapping procedure.   In that time, you realized that the column *REFNUM* should not have been mapped to LM 2001's column *Sort Code*. Instead, the column *REFNUM* should have been mapped to the LM 2001 column *Customer Number*. You would like unmap the column *REFNUM* and then map it to the LM 2001 column *Customer Number*.

To recall the mapped information that you saved in the last scenario:

1)   **Start** LM 2001.
2)   Click on **File > Import > Existing Import File…**
3)   Click on the last *dbimport* file listed.
4)   Click on **Open**.

To unmap the column *REFNUM*:

1)   Click on one of the entries in the *REFNUM* column.
2)   Click on **Remove Map**.

To map the column *REFNUM* to the LM 2001 column *Customer Number*:

1)   Click on one of the entries in the *REFNUM* column.
2)   Click on **Map**.
3)   Scroll through the *Mapping Columns to Fields* screen until you see *Customer Number*.
4)   Click on *Customer Number*.
5)   Click on **Apply**.

You have one last set of information that you would like to map. You want to ensure that your clients File Names are the same in LM 2001 as they were in your last program. Your *File Names* usually consist of your client's name and their phone number. Therefore, you would like to combine the *Name* column and the *Phone 1* column from your last program. You would then like to map the new combined column to the column *File Name* in LM 2001.

To combine the *Name* column and the *Phone 1* column from your last program:

1)   Click on **Tools > Combine Two Columns**.
2)   Enter the *Column Caption* of the *Name* column into the box provided. For example, if the *Name* column is under the column caption *col1*, enter *col1* into the box provided.
3)   Click on **Ok**.
4)   Enter the *Column Caption* of the *Phone* column into the box provided. For example, if the *Phone* column is under the column caption *col14*, enter *col14* into the box provided.
5)   Click on **Ok**.
6)   Enter an appropriate "spacer" into the box provided.
7)   Click on **Ok**.
8)   Enter the *Column Caption* of the column into which *Name* and *Phone* will be combined. For example, if you want this information entered into *col 52*, enter *col 52* into the box provided.
9)   Click on **Ok**.

To map *col 52* to the *File Name* column in LM 2001:

1)   Click on one of the entries in the *col52* column.
2)   Click on **Map**.
3)   Scroll through the *Mapping Columns to Fields* screen until *File Name* appears.
4)   Click on **Apply**.

Importing the Mapped Data into Lawn Monkey 2001

The process required to import the mapped data into LM 2001 is detailed below. Once this process has been completed, LM 2001 will be updated with all of your client information.

Scenario 1

> You have completed the mapping process. All of your client information has been mapped to the appropriate column in LM 2001. You would like to complete the importing procedure by *Importing Data*.

To begin the *Importing Data* process:

1) Click on the gray square to the left of the first row of information (i.e. the row that contains the column headings *!CUST*, *NAME*, *BADDR1* etc.). This will highlight the entire row.
2) Click on **Remove**.
3) Click on **Import Data**.
4) The data will begin entering into LM 2001. One or more of the following steps may need to be taken:

> **If:** You receive a message that reads *"Invalid 'Phone1'. This must be numeric."*
> **Then:** Click on one of the cells in the *Phone Number* column. Click on **Tools > Remove Non-numeric Characters**. Click on **Import Data**.

> **If:** You receive a message asking you to set a default invoice type.
> **Then:** Enter the number of the invoice type preferred into the box provided and click on **Ok**.

> **If:** You receive a message stating that *"Lawn Monkey could not detect one of your tax codes. Do you want to add this tax code?"*
> **Then:** Click on **Yes**. Click on **Add New**. Enter the appropriate tax information into boxes provided. Click on **Close (Esc)**.

> **If:** You receive a message stating that *"Lawn Monkey could not detect one of your primary / secondary groupings. Do you want to add this primary / secondary grouping?"*
> **Then:** Click on **Yes**. Click on **Add New**. Enter the appropriate information into the boxes provided. Click on **Close (Esc)**.

5) Once the *Import Center* indicates that the import has been completed, go to the LM 2001 *Client Form* to verify that your client information has indeed successfully entered into the program.

Note: You LM 2001's Import Center allows you to import data more than once. This can be done in one of two ways:

I. Start the entire process over again. This would involve creating a new export file and working back through the steps outlined in this manual.

II. Create a new database by clicking on **File > New Company Database**. Next, recall your saved import file as described on *p.7* of this manual.