



# QUICK CONVERT

## How to Import/Update Records Into TMS

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# Overview

## Purpose

Quick Convert allows you to import records into your TMS database.

You can import directly from a spreadsheet or other data file, as well as from another database (a trial database, another TMS product's database, or another CMMS's database).

Although Quick Convert allows import into several different TMS modules, there are limits to what can be imported.

## What Can Be Imported?

The records that can currently be imported are as follows:

- **Assets:**  
Assets, Contacts, Downtimes, Materials
- **Vendors:**  
Contacts, Contracts, Material Items, Models, Vendors
- **Contracts:**  
Assets, Contracts, Payments, Terms
- **Resources:**  
Contacts, Resource Exceptions, Resources
- **Procedures:**  
Procedures, Procedure-Sub Procedures
- **Sub Procedures:**  
Choices, Ranges, Sub Procedures
- **Work Orders:**  
Assets, Assignments, Material Issues, Procedures, Time Charges, Work Orders
- **PM Schedules:**  
Assets, Assignments, PM Schedules, Procedures
- **PE Schedules:**  
Assets, PE Schedules, Procedures
- **General:**  
Codes

# The Quick Convert Tool (QC)

## How to Use QC

- Launch Quick Convert: *Start > All Programs > Four Rivers Software Systems, Inc. > TMS Quick Convert*).

The tool wizard launches

- Enter a valid Username and Password for the db from which you will be importing records into the TMS db.

- **Server Name** field: enter the name of the database server.

- **Database** field: enter the name of the database from which you want to import records.

- **Service URL** field: enter the SDK URL.

OnSite:

<http://server/tmsWebServices>

Online:

<https://sitename.tmonline.com/tmsconnect/>

- Click the *Login* button.

TMS Quick Convert Version 5.30.2.1777

Login

**Steps**

- ▶ Login
- Welcome
- Select Source Type
- Select Source
- Select Module
- Create Mapping
- Validate Data
- Import Data

Four Rivers SOFTWARE SYSTEMS

User Name: Your\_User\_Name

Password: .....

Server: Your\_Server\_Name

Database: Your\_Database\_Name

Service UR: http://localhost/tmswebservices/

Server Name: Your\_Server\_Name

Database: Your\_Database\_Name

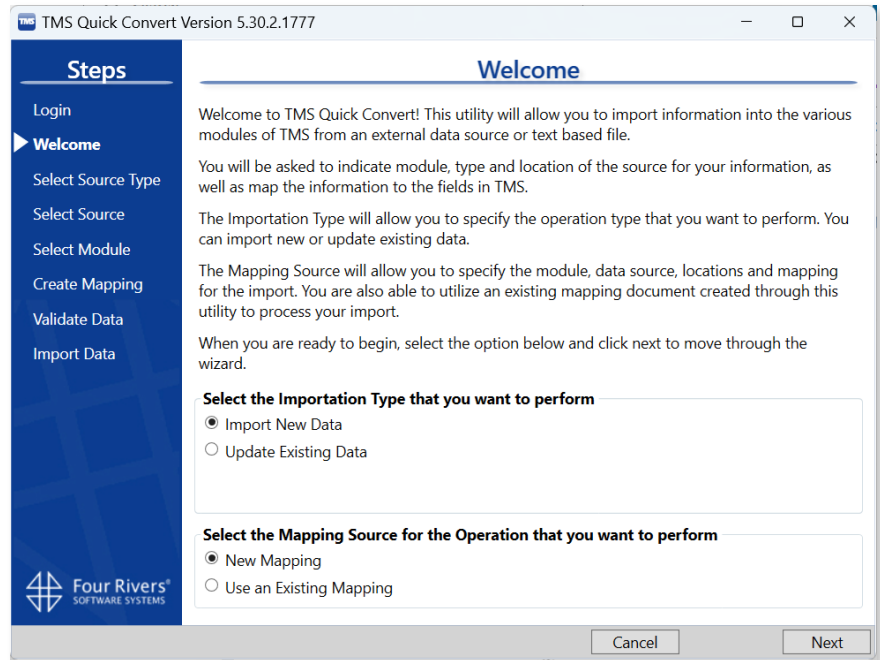
Service URL: http://localhost/tmswebservices/

Cancel SSO Login Login

## Welcome – Select Operation

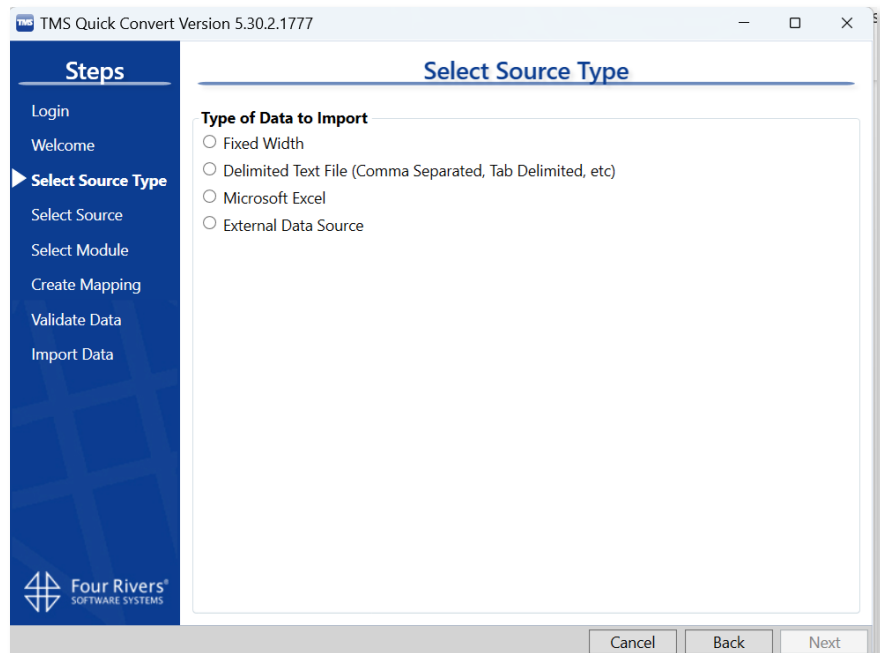
- **Import New Data:** Use this to start a completely new Quick Convert import.
- **Update Existing Data:** Use this option to update already existing records (this option currently only works with Asset records).
- **New Mapping:** Use this if you are going to manually map the file columns to the TMS fields.
- **Use an Existing Mapping:** Use this option to continue using a Mapping previously created.

More details in the *Using an Existing Mapping* section at the end of this guide.



## Select Source Type

- **Fixed Width:** A fixed width text file.
- **Delimited Text File:** A text file with each field separated by a particular character such as a comma or tab.
- **Microsoft Excel.**
- **External Data Source:** Such as:
  - Access
  - Microsoft SQL Server
  - MySQL
  - Oracle



# Excel/CSV Column Formatting

Pay special attention to the formatting of columns in your file. Examples include:

- **Asset Number / Account:** despite storing numeric values most of the time, *Asset Number* and *Account* are **Text** fields and need to be formatted as such, so that values like “0100” do not convert to “100”.
- **Date Purchased (and Date fields in general):** It’s advised formatting it as *Date* (MM/DD/YYYY). If issues occur, you might want to try formatting it as *Text*.
- **Service Manual (and Checkboxes in general):** Checkboxes can be set as 0 or 1.

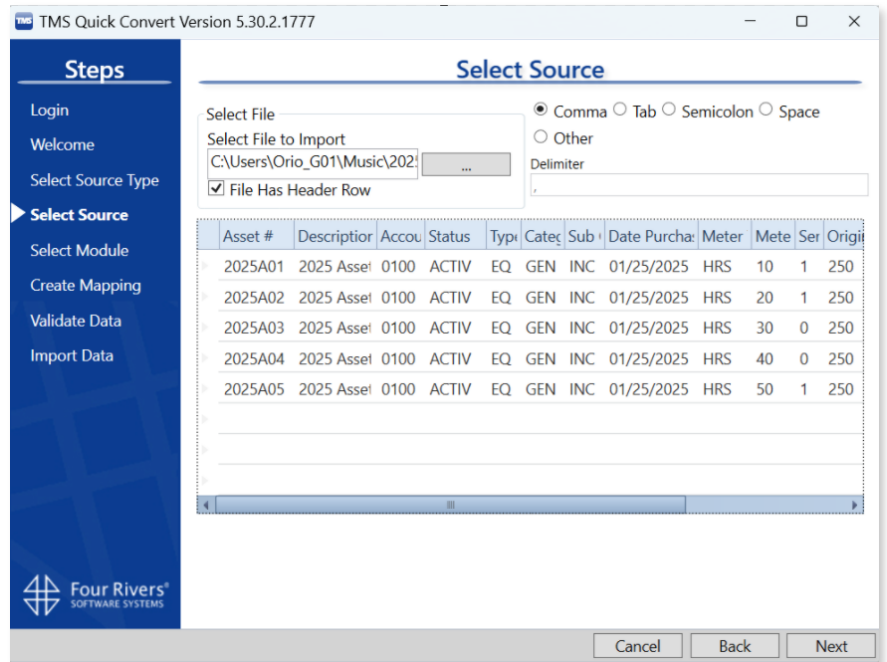
= 0

= 1

	A	B	C	D	E	F	G	H	I	J	K	L
1	Asset #	Description	Account	Status	Type	Category	Sub Category	Date Purchased	Meter Type	Meter Reading	Service Manual	Original Cost
2	2025A01	2025 Asset 01	0100	ACTIV	EQ	GEN	INC	10/25/2024	HRS	10	1	250
3	2025A02	2025 Asset 02	0100	ACTIV	EQ	GEN	INC	2/28/2025	HRS	20	1	250
4	2025A03	2025 Asset 03	0100	ACTIV	EQ	GEN	INC	10/14/2024	HRS	20	0	250
5	2025A04	2025 Asset 04	0100	ACTIV	EQ	GEN	INC	3/21/2025	HRS	20	0	250
6	2025A05	2025 Asset 05	0100	ACTIV	EQ	GEN	INC	4/20/2024	HRS	20	1	250

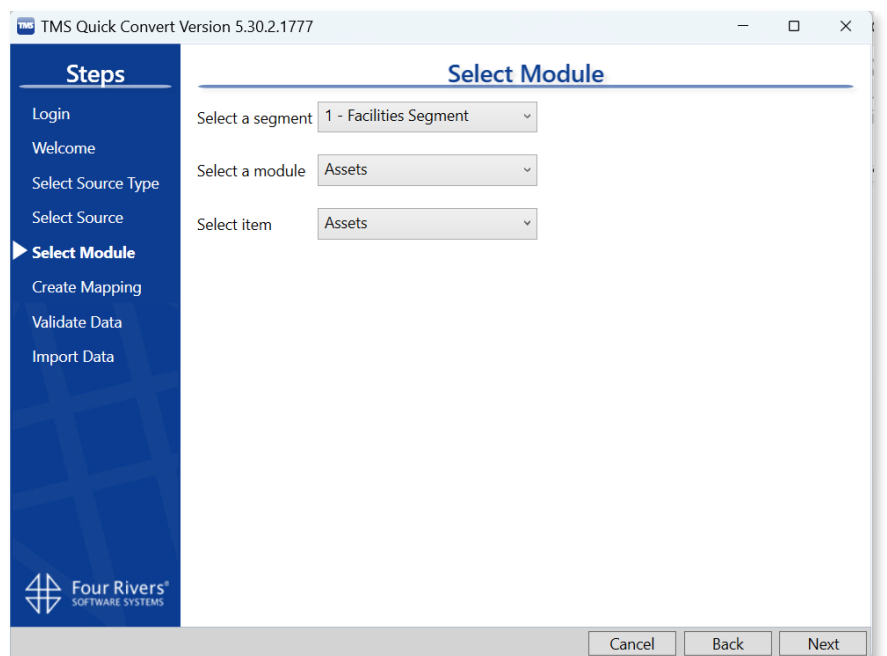
## Select Source (CSV Example File)

- Click on the [ ... ] *browse* button.
  - Navigate to the file.
  - If there is a header on your file check **File Has Header Row**
  - Click the radio button corresponding to the delimiter (*Comma* is used in this example).
- The Source file will display a preview below the source selection.
- Click *Next*.



## Select Module

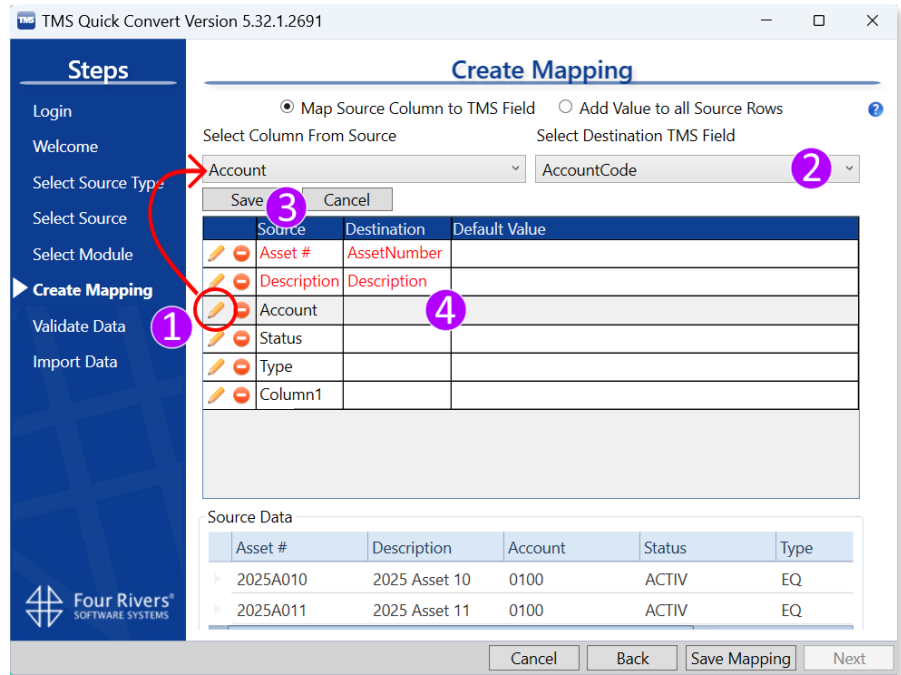
- **Select a Segment:** Choose a segment within your TMS database which has been licensed for Quick Convert.
- **Select a module:** Choose the module within TMS you will be importing data into.
- **Select item:** Select an area of the chosen module which you will be importing data into. For example, for Assets, the options are:
  - Assets
  - Contacts
  - Downtimes
  - Materials



# Create Mapping (Source)

## Using Map Source Column to TMS Field

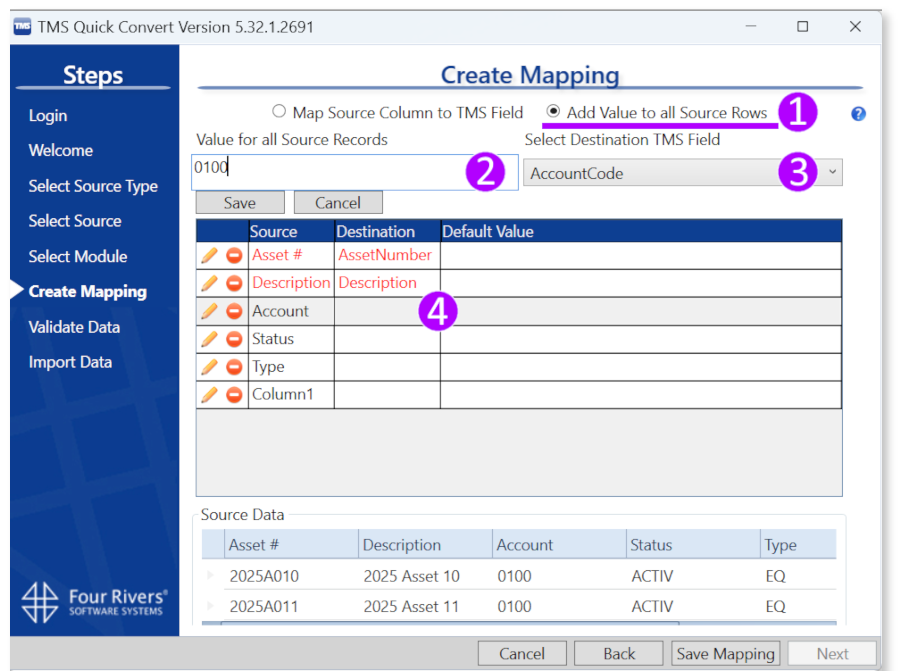
- **Select Column from Source:** Double-click the *pencil* icon next to any field to select a column from your data file ①.
- **Select Destination TMS Field:** Choose the field in TMS where your data will be mapped to ②.
- **Click Add:** Your mapping should appear below ③ and ④.



# Create Mapping (Add)

## Using Add Value to all Source Rows

- **Add Value to all Source Rows:** Click the radio button ① to manually add values to any desired column.
- **Value for all Source Records:** Type in the value you would like to have mapped for all imported entries ②.
- **Selection Destination TMS Field:** Choose the field where the value will be mapped to ③ and ④.

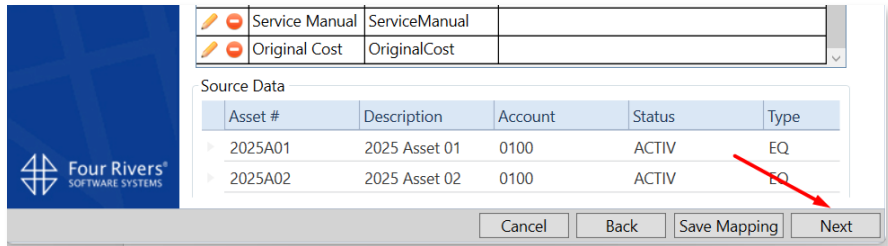
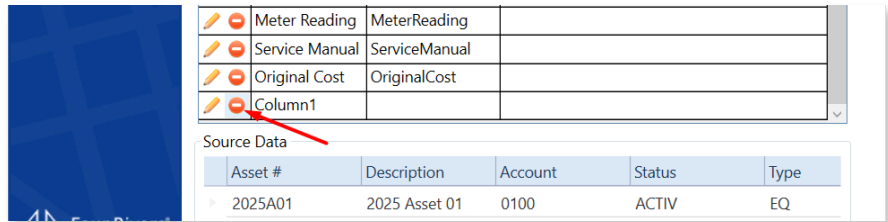


## Create Mapping (Notes)

- Once all fields are mapped, you might see a row called *Column 1* at the bottom of the list. Feel free to delete it.

- **All REQUIRED FIELDS denoted in red must be mapped.** Repeat this process until all the desired fields are mapped.

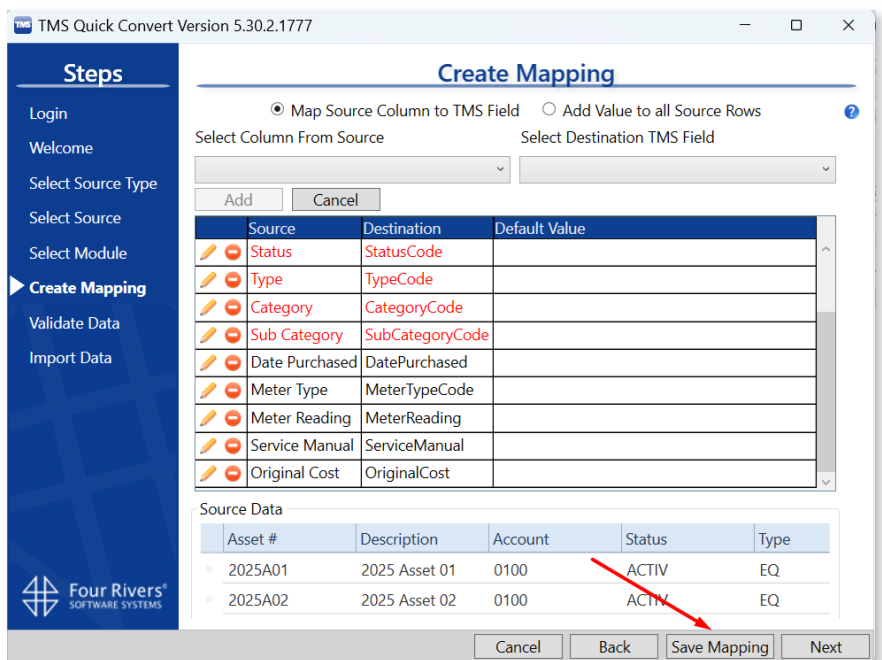
At the end, if all required fields have been mapped correctly, the *Next* button should light up.



## Save Mapping

After completing the mapping, and **before** proceeding with the import, you can save the mapping as an XML file to be used in future imports.

More details in the *Using an Existing Mapping* section at the end of this guide.



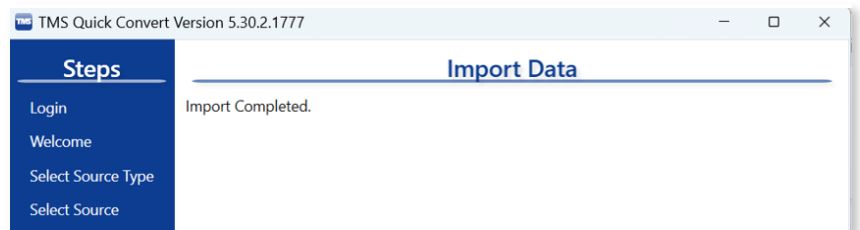
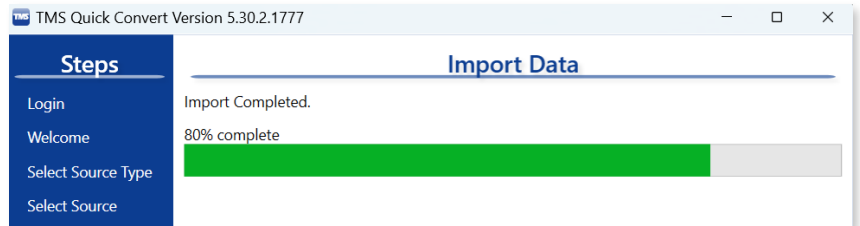
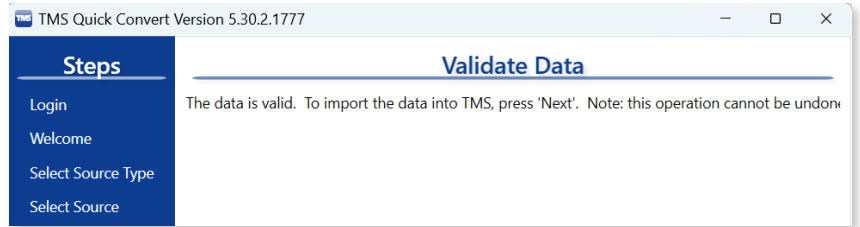
## Validate Data

- If validation errors occurred, the errors are listed for you. Review the list and select *Back* if you need to make changes to the mapping file.
- When you are ready to import your data, select *Next*.

**CAUTION:** Once the import process starts, it cannot be stopped or reversed.

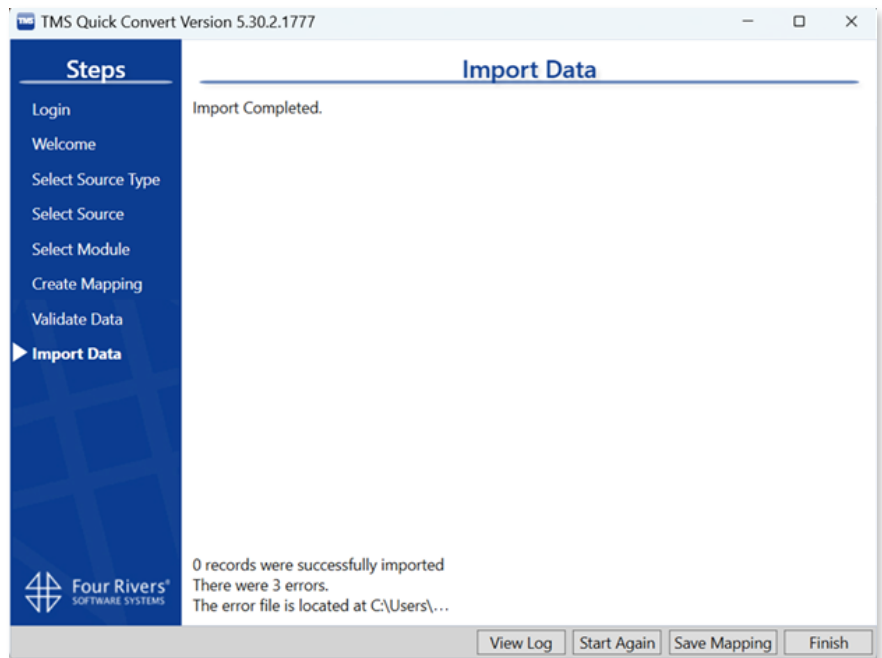
- Once the process is completed, a confirmation message appears.

If errors occurred, they are listed. Review the list.



## Import Data

- **View Log:** Creates a text file with the import log. Note: The log file is automatically saved in the same location as your data file.
- **Start Again:** Takes you back to the *Welcome – Select Operation* section.
- **Save Mapping:** Saves the mapping as an XML file to be used in future imports.
- **Finish:** Closes the TMS Quick Convert wizard.



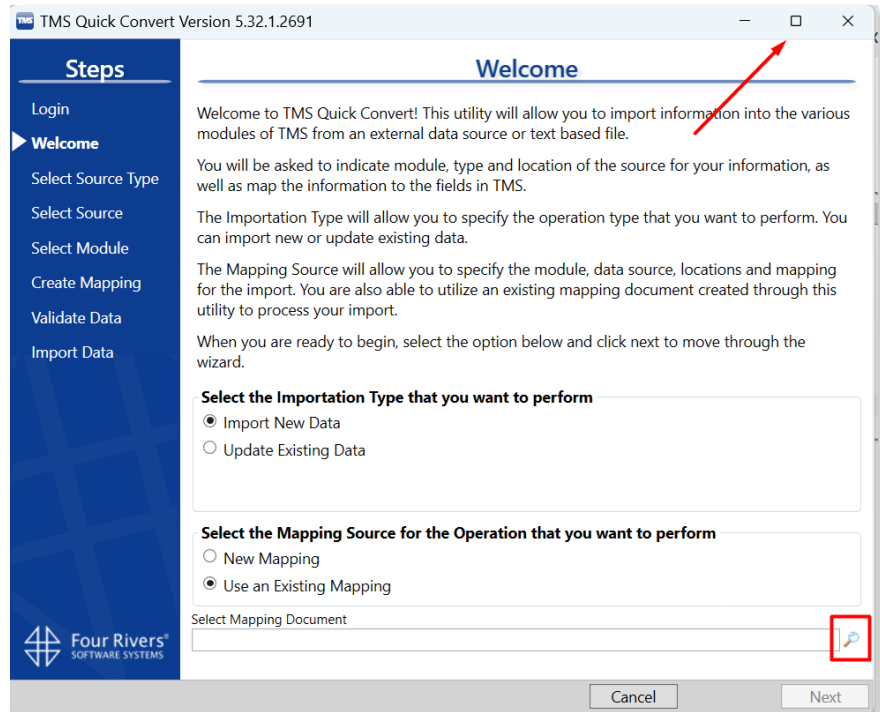
# Using an Existing Mapping

- In the *Welcome* section, click the *Use an Existing Mapping* radio button.

If the **Select Mapping Document** field does not show up, expand the Quick Convert window (square icon at the top right-hand corner).

- When using a mapping file, make sure it matches the columns present in your spreadsheet.

In other words, if the mapping was saved with columns **“Asset Number, Asset Description, Account, Category”** your file will need to have the same columns in the same order.



# Troubleshooting

## Common Errors

Below you can find some errors that might occur during import processes. Though details and solutions are listed along with each error, it is not guaranteed that the solution will work 100% of the time.

If any issues arise, contact Accruent Support for assistance.

### The 'Microsoft.ACE.OLEDB.12.0' Provider is not registered on the local machine

**Details:** Quick Convert does not work with Office 64 bits due to a driver issue.

**Solution:** Convert the file to CSV and try again. It should work.

### Value cannot be null. Parameter name: connectionString

**Details:** Excel might have a ghost column causing the error.

**Solution:** Copy the columns from your Excel file and paste them into a brand new one.

### Failed to convert parameter value from a String to a Decimal.

**Details:** The presence of characters such as \$ in numeric fields is a known cause.

**Solution:** Remove the \$ and any other character from the numeric fields.

### Error saving. Error Meter Type is a required field when a Meter Reading is present.

**Cause:** Quick Convert version 5.26.4.2165 is known for throwing this error.

**Solution:** Download the latest version of Quick Convert by requesting from Support.

### Error Mapping DateCompleted Exception: String was not recognized as a valid DateTime

**Cause:** Uploading WOs with *Complete Date* values for some **but not all** rows.

**Solution:** If you want to keep the Complete Date empty, set it as 1/1/1900 in all desired rows as it represents a NULL value

# Info / Contact Support

## **QUICK CONVERT - How to Import/Update Records Into TMS**

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### **Contact Accruent Support**

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Email: [TmsSupport@accruent.com](mailto:TmsSupport@accruent.com)

Community Portal: <http://accruent-support.force.com/healthcare>

Chat: <https://www.accruent.com/customer-support>