

Data Import Instructions

To ensure a successful data import, follow these steps carefully. Below are the details of the required data for each entity and the order in which the data should be imported.

Import Order

1. Boat Owners
2. Boats
3. Charter Agencies
4. Customers
5. Extras
6. Bookings

Data Requirements for Each Entity

In each Excel sheet, the following fields can be included for each entity. The fields marked as **required** are mandatory, while the others are optional. Each field is listed with its corresponding name you should use in the Excel sheet.

1. Boat Owners

- **First Name** (required) => `firstName`
- **Last Name** (required) => `lastName`
- **Email** (required) => `email`
- Legal Company Name (optional) => `legalCompanyName`
- Phone (optional) => `phone`
- Office Address (optional) => `officeAddress`
- Tax Authority Address (optional) => `taxAuthorityAddress`
- VAT (optional) => `vat`
- Note (optional) => `note`
- Percentage of Booking (optional) => `percentageOfBooking` (in format 0.5 for 50%, 0.1 for 10%, etc.)

2. Boats

- **Registry Number** (required) => `registryNumber`
- **Type ID** (required) => `typeId`
- **Boat Owner Email** (optional, required for linkage) => `boatOwnerEmail`
- **Name (required)** => `name`
- Model (optional) => `model`
- E-Registry (optional) => `eRegistry`
- Call Sign (optional) => `callSign`
- Build Year (optional) => `buildYear`
- Cabins Number (optional) => `cabinsNumber`
- Length (optional) => `length`

- Capacity Number (optional) => `capacityNumber`
- Toilets Number (optional) => `toiletsNumber`
- Home Port ID (optional) => `homePortId`
- Registry Port ID (optional) => `registryPortId`
- VAT (optional) => `vat` (in format 0.24 for 24%, 0.06 for 6%, etc.)
- Security Deposit (optional) => `securityDeposit`
- Note (optional) => `note`
- Sail Type ID (optional) => `sailTypeId`
- Genoa Type ID (optional) => `genoaTypeId`

3. Charter Agencies

- **Name** (required) => `name`
- **Email** (required) => `email`
- **Country Code** (required) => `countryCode`
- Legal Company Name (optional) => `legalCompanyName`
- Phone (optional) => `phone`
- Street Address (optional) => `streetAddress`
- VAT (optional) => `vat`
- City (optional) => `city`
- Zip Code (optional) => `zipCode`
- Tax Authority Address (optional) => `taxAuthorityAddress`
- Percentage of Booking (optional) => `percentageOfBooking` (in format 0.5 for 50%, 0.1 for 10%, etc.)
- Note (optional) => `note`

4. Customers

- **First Name** (required) => `firstName`
- **Last Name** (required) => `lastName`
- **Email** (required) => `email`
- Phone (optional) => `phone`
- Address (optional) => `address`
- City (optional) => `city`
- Zip Code (optional) => `zipCode`
- Country Code (optional) => `countryCode`
- Note (optional) => `note`
- Platform ID (optional) => `platformId`

5. Extras

- **Name** (required) => `name`
- **Price** (required) => `price`
- **Billing Type ID** (required) => `billingTypeId`
- Description (optional) => `description`

6. Bookings

- **Start Date** (required) => **startDate** (Date type or text in the format (all formats are valid)YYYY-MM-DD, YYYY-MM-DD HH:mm:ss, YYYY/MM/DD, or YYYY/MM/DD HH:mm:ss)
- **End Date** (required) => **endDate** (Date type or text in the format (all formats are valid)YYYY-MM-DD, YYYY-MM-DD HH:mm:ss, YYYY/MM/DD, or YYYY/MM/DD HH:mm:ss)
- **Type** (required) => **type**
- **Boat Registry Number** (required) => **boatRegistryNumber**
- **Customer Email** (required for Booking and Option types) => **customerEmail**
- Boat Owner Email (optional but required for linkage) => **boatOwnerEmail**
- Boat Owner First Name (optional but required for linkage) => **boatOwnerFirstName**
- Boat Owner Last Name (optional but required for linkage) => **boatOwnerLastName**
- Customer First Name (optional but required for linkage) => **customerFirstName**
- Customer Last Name (optional but required for linkage) => **customerLastName**
- Charter Agency Email (optional but required for linkage) => **charterAgencyEmail**
- Charter Agency Name (optional but required for linkage) => **charterAgencyName**
- Option Expiration Date (optional) => **optionExpirationDate** (Date type or text in the format (all formats are valid)YYYY-MM-DD, YYYY-MM-DD HH:mm:ss, YYYY/MM/DD, or YYYY/MM/DD HH:mm:ss)
- Number of Passengers (optional) => **numberOfPassengers**
- Total Value (optional) => **totalValue**
- Charter Agency Cut (optional) => **charterAgencyCut**
- Boat Owner Cut (optional) => **boatOwnerCut**
- Charter Operator Cut (optional) => **charterOperatorCut**
- Charter Fee (optional) => **charterFee**
- Extras Revenue (optional) => **extrasRevenue**
- Start Port ID (optional) => **startPortId**
- End Port ID (optional) => **endPortId**
- Platform ID (optional) => **platformId**
- Note (optional) => **note**
- APA (optional) => **apa** (in format 0.5 for 50%, 0.1 for 10%, etc.)
- VAT (optional) => **vat** (in format 0.24 for 24%, 0.06 for 6%, etc.)
- Security Deposit (optional) => **securityDeposit**
- Created At (optional) => **createdAt** (Date type or text in the format (all formats are valid)YYYY-MM-DD, YYYY-MM-DD HH:mm:ss, YYYY/MM/DD, or YYYY/MM/DD HH:mm:ss)
- Updated At (optional) => **updatedAt** (Date type or text in the format (all formats are valid)YYYY-MM-DD, YYYY-MM-DD HH:mm:ss, YYYY/MM/DD,

or YYYY/MM/DD HH:mm:ss)

- Extra Names (comma-separated, optional) => **extraNames**
- Extras Billing Types (comma-separated, optional) => **extrasBillingTypes**
- Extras Billing Type IDs (comma-separated, optional) => **extrasBillingTypeIds**
- Extras Amounts (comma-separated, optional) => **extrasAmounts**
- Extras Prices (comma-separated, optional) => **extrasPrices**

Import Instructions

Step-by-Step Process

1. Prepare the Data:

- Ensure each entity's data is organized and formatted correctly in the respective Excel sheets.
- Verify that required fields are populated and valid.
- Percentage fields should be in decimal format (e.g., 50% should be entered as 0.5).
- Date fields should be either in Date type or as a text in the format (all formats are valid) YYYY-MM-DD, YYYY-MM-DD HH:mm:ss, YYYY/MM/DD, YYYY/MM/DD HH:mm:ss.
- Numeric values like length of a boat, money amounts and other should be entered as numbers without any special characters with a dot (.) as the decimal separator.

2. Import Boat Owners:

- Import boat owners first to create the necessary linkage for boats and bookings.

3. Import Boats:

- Import boats after owners, as boats are linked to boat owners.

4. Import Extras:

- Import the extras to ensure they are available for inclusion in bookings.

5. Import Charter Agencies:

- Import charter agencies next to link them with bookings.

6. Import Customers:

- Import customers to enable customer-related bookings.

7. Import Bookings:

- Finally, import bookings, ensuring all linked entities (boats, customers, boat owners, charter agencies, extras) are already in the system.

Additional Notes

- Ensure that email and registry number fields are unique and correctly formatted to avoid duplication and linkage issues.
- Verify the integrity of the data before import to minimize errors and rollback scenarios.

- Fields containing date information should either be in Date type or in one of the following formats (all formats are valid): YYYY-MM-DD, YYYY-MM-DD HH:mm:ss, YYYY/MM/DD, or YYYY/MM/DD HH:mm:ss

By following these instructions carefully, you can ensure a smooth and successful data import process.

Additional Data

Before inserting data, please make sure that IDs you specify are valid and are present in tables below. Errors like this will be thrown if you specify an invalid ID: `Error importing boats: insert or update on table "boat" violates foreign key constraint "boat_home_port_id_fkey"`

Boat Types

ID	Name
1	Sailing Yacht
2	Motor Yacht
3	Catamaran
4	Motor Sailer

Sail Types

ID	Name
1	Full Baten
2	Semi-Full Baten
3	Furling

Genoa Types

ID	Name	Description
1	Full Baten	Genoa type full baten
2	Furling	Genoa type furlong
3	Self-Tracking Jib	Genoa type self-tracking jib

Booking Status Enum

Value	Description
Active	active

Value	Description
Cancelled	cancelled
Completed	completed
Expired	expired

Booking Type Enum

Value	Description
Booking	booking
OwnerUse	ownerUse
Option	option
Service	service

Platform IDs

ID	Name
1	NauSys
2	YachtSys
3	MMK
4	Yachtfolio

Billing Type IDs

ID	Name
1	Per Item
2	Per Day
3	Per Week
4	Per Month
5	Once