Importing Job Codes in Sage BusinessWorks 2012

Sage BusinessWorks Accounting import format requirements:

1. The import file must be in a comma delimited variable (.CSV) text format. Each field can contain only standard ASCII characters, separated by commas. The file should resemble the examples at the end of this document.
2. ***Only those fields listed on the following page can be imported into Sage BusinessWorks, and they must be imported in the order shown.***
3. Each record in the file must be terminated by a carriage return and line feed.

Before you begin the import process:

1. Always back up your company data prior to importing a file.
2. Do not delete the import file from your system's memory until you are satisfied with the results of the import.

Job Code import format

Each record consists of up to 10 fields:

	Field	Max Length[1]	Valid Entries, Format, or Range
0	Transaction Type[2]	N/A	Add: /A or /ADD Update: /U or /UPDATE Rename: /R or /RENAME Delete: /D or /DELETE Change: /C or /CHANGE
1	Job Code ID[3]	20	Any text. (Lowercase letters are converted to uppercase during import.)
2	Description[3]	28	Any text.
3	Unit of Measure[4]	4	Any text. (If importing Labor-type job codes, Sage BusinessWorks automatically sets this field to "Hour".)
4	Type[3]	2	Consolidating: C Equipment: E Labor: L Material: MA Miscellaneous: M Overhead: O Subcontract: S
5	Fractional Quantity	1	Y or N. (When importing Labor-type job codes, Sage BusinessWorks automatically sets this field to Y.)
6	Fractional Cost/Price	1	Y or N.
7	Standard Unit Cost	9	0.00 - 999,999.00[5]
8	Suggested Unit Price	9	0.00 - 999,999.00[5]
9	Consolidation Job Code?	20	Any valid pre-existing consolidation job code.

[1] If the length of a field exceeds the maximum number of characters allowed for importing, Sage BusinessWorks automatically truncates it to the maximum number allowed.

[2] If adding a new job code, no prefix is required. If /U is used, Sage BusinessWorks updates an existing job code or adds a new one if that job code ID does not exist. /C changes existing job code IDs only. /D deletes a job code ID only if the job code is not used on any jobs.

[3] Required fields when adding a new job code ID.

[4] Optional field that must still be delimited with a comma.

[5] Do not enter commas or dollar signs in import records. (They are used here for clarity only.)

Job code import examples

The following are examples of the import records. Note that <cr> and <lf> represent carriage-return and line-feed, respectively.

1. **Adding a record.** Sage BusinessWorks adds a new record only if the job code ID does not already exist. (The three examples below are identical in function.)

   2x4x8,eight foot 2x4,,MA,N,N,.98,1.29,LUMBER<cr><lf>

   /ADD,2x4x8,eight foot 2x4,,MA,N,N,.98,1.29,LUMBER<cr><lf>

   /A,2x4x8,eight foot 2x4,,MA,N,N,.98,1.29,LUMBER<cr><lf>

   - Notice the extra comma after the description line in these records. Commas are used as “place holders” to tell Sage BusinessWorks that a field is to be left blank (or unchanged in the case of an update). In these examples, a place holder is used for field 3 *Unit of Measure*. Without this comma, Sage BusinessWorks would attempt to import “MA” as Unit of Measure, “N” as Type, and so on.

2. **Updating a record**. If the job code ID, 1001, already exists in this company, Sage BusinessWorks updates that job code with information from this import record. If this job code doesn’t exist in this company, Sage BusinessWorks adds it.

   /UPDATE,1001,“26 inch bicycle, boy’s”,“each”,MA,N,N,125.00,250.00<cr><lf>

   - In this record, the description, “26 inch bicycle, boy’s” is enclosed in quotation marks because the field contains a comma. If quotation marks were not used here, Sage BusinessWorks would attempt to put “boy’s” into the Unit of Measure field, “each” into the Type field, etc.

3. **Changing a record**. If the /C or /CHANGE parameter is used, Sage BusinessWorks changes a record that already exists in the company with this ID. In this example, if the job code ID “1002” exists, Sage BusinessWorks updates the record with a new suggested price. Otherwise, the record is ignored during the import process.

   /CHANGE, 1002,,,,,,,225.00<cr><lf>

4. **Deleting a record.** Enter the “deleting” prefix followed by the ID to delete. Sage BusinessWorks deletes the job code only if it has not been identified in a phase of any job in this company.

   /DELETE,1002<cr><lf>

5. **Renaming a record.** Enter the “renaming” prefix, original ID, and new ID. In the record below, the job code ID “ABC” is changed to “XYZ”

   /RENAME,ABC,XYZ<cr><lf>