



Importing Ship-To Addresses in Sage BusinessWorks 2013

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.

Ship-To Address import format

Each record consists of up to 16 fields:

Field	Max Length ¹	Valid Entries / Format
0 Transaction Type ^{2*}	N/A	Add: /A or /ADD Update: /U or /UPDATE Delete: /D or /DELETE
1 Customer ID ^{3*}	12	Any existing customer ID. You cannot import addresses to the CASH customer ID.
2 Ship-To Number ^{3*,5*}	3	If this number is left blank, the next available number is automatically assigned between 1 and 500.
3 Description ^{3*}	24	Any text.
4 Ship-To Name ^{3*}	40	Any text.
5 Address 1 ^{3*}	40	Any text.
6 Address 2 ^{3*}	40	Any text.
7 City ^{3*,4*}	40	Any text.
8 State ^{3*,4*}	2	Any text.
9 Zip Code	10	Any text.
10 Shipping Instructions ¹	18	Any text. Imported shipping instructions do not have to correspond to shipping instructions listed in the Accounts Receivable module.
11 Sales Tax 1 ID	4	Any existing Sales Tax ID.
12 Sales Tax 2 ID	4	Any existing Sales Tax ID.
13 Sales Tax 3 ID	4	Any existing Sales Tax ID.
14 Phone	14	Ship-to Telephone #: (xxx)xxx-xxxx
15 E-mail	200	Ship-to e-mail address

- ¹ If the length of a field exceeds the maximum number of characters allowed for importing, Sage BusinessWorks will automatically truncate it to the maximum number allowed.
- ² If adding a new ship-to address, no prefix is required. If /U is used, Sage BusinessWorks will update an existing ship-to address or add a new one if that ship-to address does not exist. /D will delete a ship-to address **only** if the ship-to address has no historical transactions currently on file.
- ³ Required fields when adding a new ship-to address.
- ⁴ Sage BusinessWorks stores city and state as two separate fields, making it possible to import and export the two fields separately. However, the import rules will change. The import can accommodate either "City, State" as one field or "City", "State" as two separate fields. It will correctly split "City, State" into "City", "State" during the import.
- ⁵ When importing addresses 1 – 500, the first address (#1) imported for the customer will be their primary ship-to address that displays in Maintain Customers.

Ship-To Address import examples

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

1. **Adding a record.** Sage BusinessWorks will add a new record only if the Ship-to address does not already exist. (The three examples below are identical in function.)

ETC,2,second location,Loomis Whse,123 Taylor Rd,,Loomis,CA,95650,UPS<cr><lf>

/A,ETC,2,second location,Loomis Whse,123 Taylor Rd,,Loomis,CA,95650,UPS<cr><lf>

/ADD,ETC,2,second location,Loomis Whse,123 Taylor Rd,,Loomis,CA,95650,UPS<cr><lf>

2. **Updating a record.** If the customer ID "ETC" already has a ship-to address in this company, the ship-to address will be updated. If this ship-to address doesn't exist in this company, it will be added. In addition, if no Sales Tax ID exists, the Sales Tax ID will be added to the ship-to address.

/Update,ETC,2,second location,Loomis Whse,456 Taylor Rd,,Loomis,CA,95650,UPS, CA<cr><lf>

3. **Deleting a record.** The entry will delete the #2 ship-to address for customer ETC.

/Delete,ETC,2<cr><lf>