Importing Customer Information 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. Your 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.

Time-savers:

1. **Ship-to Addresses:** When adding a new customer (or changing an existing customer whose billing and shipping address are the same), Sage BusinessWorks will automatically copy the bill-to address (fields 3 through 6 in the format shown on the following page) from the import record into the ship-to address.
2. **Model Customer:** If you want to have default information added for all of the customers in your import file, create a model customer before importing. Then specify that customer as your model customer on the *Import Customer Information* window. Sage BusinessWorks will copy information shown in the table below from the model customer into all customer records as they are being imported:

Taxes / Rates	**Statements**	**Miscellaneous**
1st Sales Tax ID	Subject to Finance Charges?	Terms
2nd Sales Tax ID	Dunning Notes?	Sales Representative
3rd Sales Tax ID	Print Statements?	Sales Account Number
Price Level	Balance Forward?	Customer Note
Discount Rate		Customer Category
Credit Limit		

Customer 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 Rename: /R or /RENAME Delete: /D or /DELETE Change: /C or /CHANGE
1	Customer ID[3]	12	Any text. (Lowercase letters will be converted to uppercase during import.)
2	Customer Name[3]	40	Any text.
3	Address Line 1[3]	40	Any text.
4	Address Line 2[3]	40	Any text.
5	City [3,4]	40	Any text.
6	State [3,4]	2	Any text.
7	ZIP Code[3]	10	Any text.
8	Finance Contact's Telephone Number	14	Acceptable phone number formats: (NNN)NNN NNNN (NNN)NNN-NNNN ( )NNN NNNN[5] NNN-NNN-NNNN NNN NNN NNNN NNNNNNNNNN ( )NNN-NNNN [5]
9	Finance Contact Name	40	Any text.
10	Finance Contact's E-mail address	200	Any text.
11	Comment Line 1[7]	32	Any text.
12	Comment Line 2[7]	32	Any text.
13	Reseller Sales Tax ID	12	Any text.
14	Customer Since Date	8	MM/DD/YY[6]
15	Finance Contact's Fax Number	14	Acceptable phone number formats: (NNN)NNN NNNN (NNN)NNN-NNNN ( )NNN NNNN[5] NNN-NNN-NNNN NNN NNN NNNN NNNNNNNNNN ( )NNN-NNNN [5]

[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 customer, no prefix is required. If /U is used, Sage BusinessWorks will update an existing customer or add a new one if that customer ID does not exist. /C will change an existing customer only. /D will delete a customer ***only*** if the customer has no historical transactions currently on file.

[3] Required fields when adding a new customer.

[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 not 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] To import phone numbers using the formats “( ) NNN NNNN” or “( ) NNN-NNNN”, you must first choose the INTERNATIONAL setting for Phone Number formats in the Sage BusinessWorks System Manager. (Under the *Maintenance* menu, choose *System Preferences*.)

[6] The date must be entered as MM/DD/YY, regardless of the default set in the Windows Control Panel. Do not use a four-digit year, i.e., “08/01/2010”.

[7] The Comment Line 1 and Comment Line 2 are listed in the Custom Export option as UserDefined1 and UserDefined2.

Customer import examples

(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 Customer ID does not already exist. (The three examples below are identical in function.)

   ADD,"ETC","Bikes Et Cetera","357 Dundee Ave.",,"Elgin, IL","60120","(312) 683-2688","Martin Spencer", "mspencer@etc.com","Says inv. #1032 incorrect.","Refuses payment. 6/23/90"<cr><lf>

   /A,"GOLDEN","Golden Gate Rentals","8812 Haight St.",,"San Francisco, CA","94102","(415) 555-2240","Dorothy Meade"<cr><lf>

   - Notice the extra comma after the first address 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 4, “Address Line 2”. Without this comma, Sage BusinessWorks would import “Randolph, IL” as Address Line 2, “60129” as the City and State, and so on.
   - The city and state are enclosed in quotation marks because the field contains a comma. Without the quotation marks, Sage BusinessWorks would attempt to import “IL” into the zip code field, “60129” into the Telephone Number field, etc.

2. **Updating a record**. If the customer ID, HERNANDEZ, already exists in this company, Sage BusinessWorks will update that customer with information from this import record. If this customer doesn’t exist in this company, Sage BusinessWorks will add it.

   UPDATE,"HERNANDEZ","Speedy Bike World","4928 Cassett Ave.",,"Jacksonville, FL","36012","(234) 324-9826","Jack Hernandez","Just opened in May",<cr><lf>

   /U,"SILVER STEAK",,,,,"95125-4398"<cr><lf>

3. **Changing a record**. If the /C or /CHANGE parameter is used, Sage BusinessWorks will change a record which already exists in the company with this ID. In this example, if the customer ID “IBS” exists, Sage BusinessWorks will update the record. Otherwise, the record will be ignored during the import process.

   /CHANGE,"IBS",,"1238 Federal Bldg.","Avenue of the Americas","New York, NY","10020"<cr><lf>

   /C,"RODEBYKE",,,,,"95125-4398"<cr><lf>

4. **Deleting a record.** Enter the “deleting” prefix followed by the ID to delete. If there are no historical transactions for the customer, Sage BusinessWorks will delete the record. The period of time Sage BusinessWorks saves historical data is set in the *Utilities / Maintain A/R Parameters* option.

   DELETE,"YATES"<cr><lf>

   /D,"JOHNSON"<cr><lf>

5. **Renaming a record.** Enter the “renaming” prefix, original ID, and new ID. In the record below, the customer ID “SHARPE” will be changed to “BIKE CITY”

   /RENAME,"SHARPE","BIKE CITY"<cr><lf>

   /R,"STANS","STAN'S BIKES"<cr><lf>

Creating a sample file to review in Sage BusinessWorks

If you want to examine a sample customer data import file, follow the steps below to create your own file from the Sage BusinessWorks sample data using the data transfer options.

1. Create an outline: Choose *Transfer / Custom Exports*, click *New* and assign a name to the export format.
2. Select the *AR Customers* data source and select the following fields:

   Items that will be exported: <arcustomer> ID
   <arcustomer> Name
   <arcustomer> Address1
   <arcustomer> Address2
   <arcustomer> City
   <arcustomer> State
   <arcustomer> ZipCode
   <arcustomer> FinancePhoneNo
   <arcustomer> FinanceContact
   <arcustomer> FinanceEmail
   <arcustomer> UserDef1
   <arcustomer> UserDef2
   <arcustomer> SalesTaxID
   <arcustomer> CustSinceDate
   <arcustomer> FinanceFaxNo
3. Click *Next* on the **Set Sort By** and **Set Filters** windows, then click *Done*.
4. Click the *Export* button and select “Comma-Delimited Text (CSV)” from the drop-down list.
5. Select the “View on Screen” radio button and click *OK*. The file displays in Excel.
6. In Excel, delete Row 1. (To delete a row or column, click its label, then right-click the mouse and select *Delete*.)
7. Select *Save as* from the *File* menu and browse to the location where you wish to store the file. (Leave the “Save as type” selection set to “CSV (Comma delimited) (*.csv)”.)

If you have successfully completed these steps, the file you created contains customer information that can be imported into Sage BusinessWorks. Examine this file using the Windows Notepad to become familiar with the required format for importing customer information into Sage BusinessWorks.