

SAGE 2010+ DATA IMPORT/EXPORT

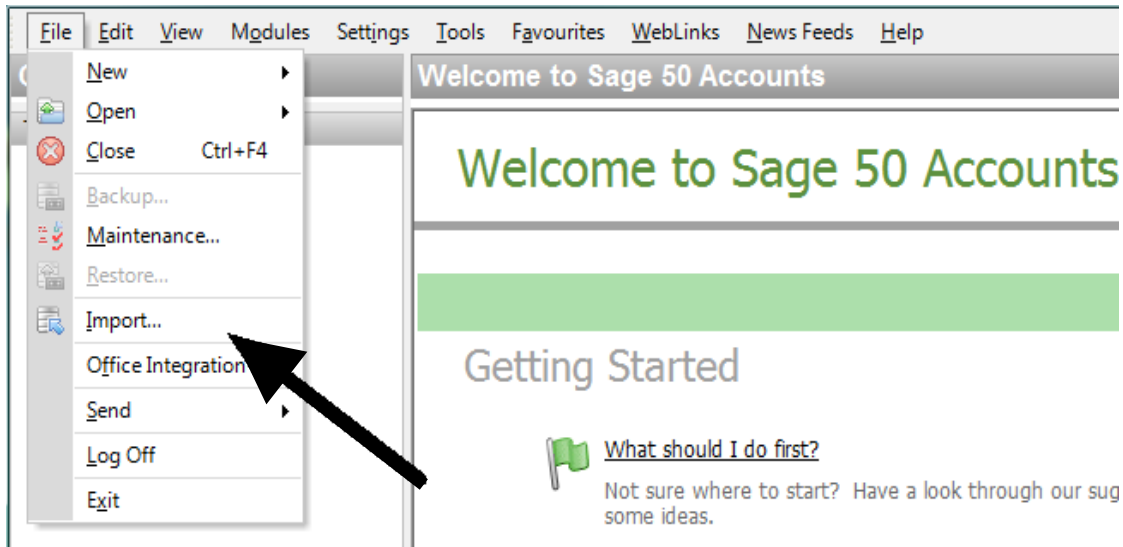
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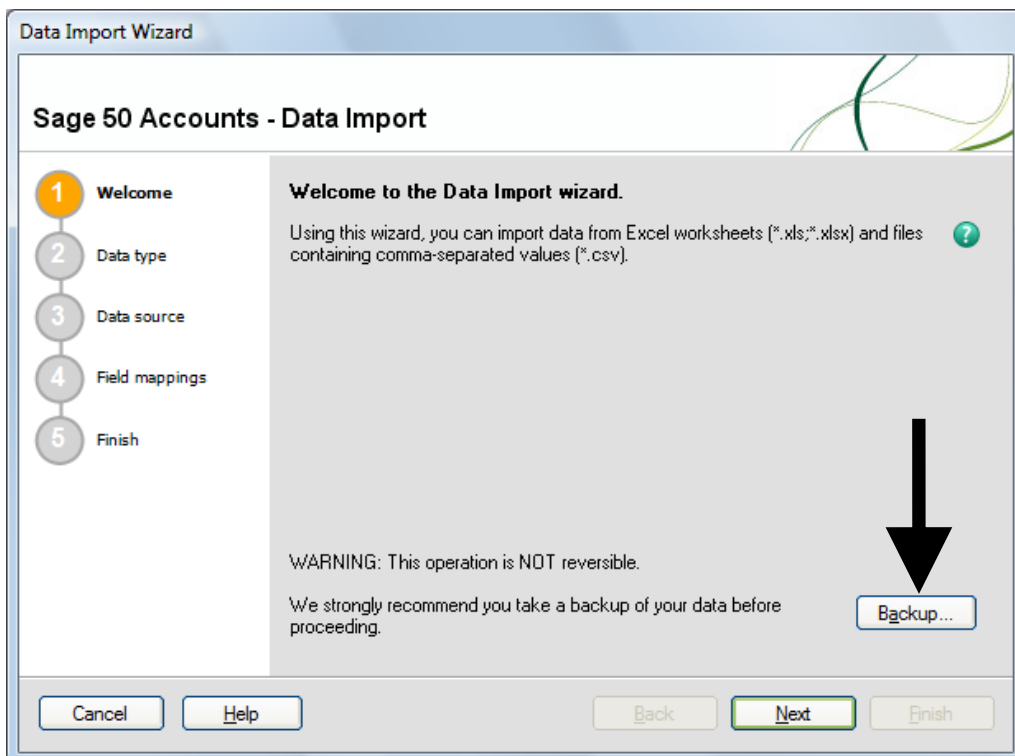
Import Customers

In Sage 50 Accounts 2010+ when you go to import the Customers file, you now have to map the fields in the file to the fields in Sage.

Click **File**



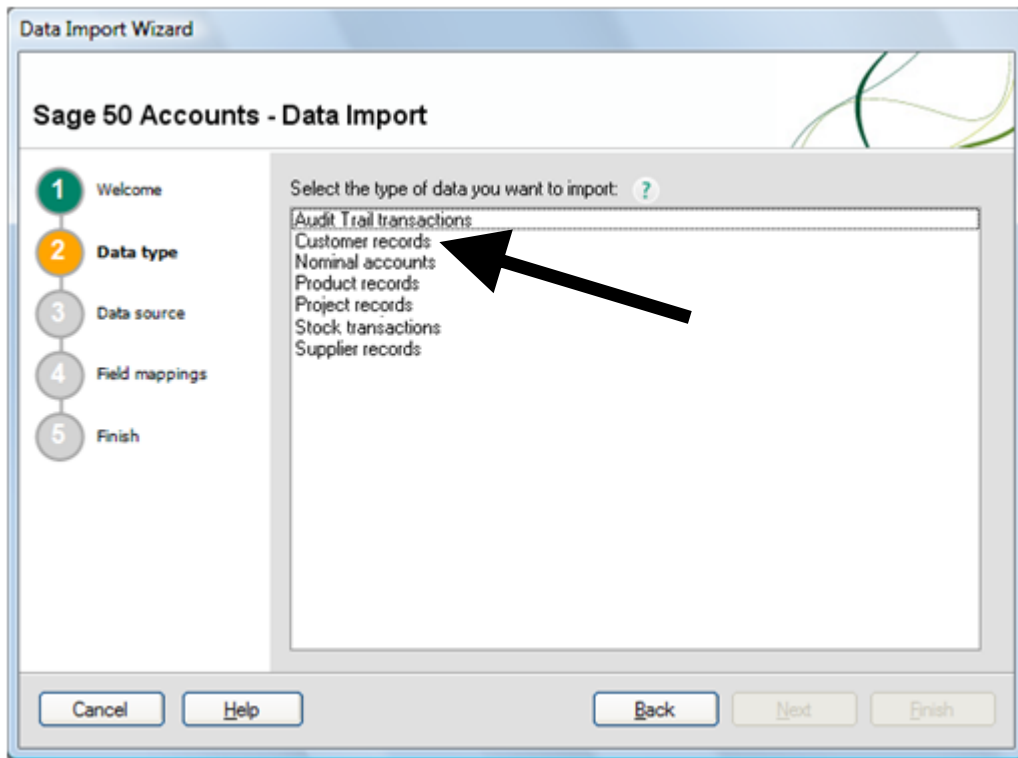
Select **Import** and the **Data Import Wizard** will emerge



Click on **Backup** to make a backup of your data first.

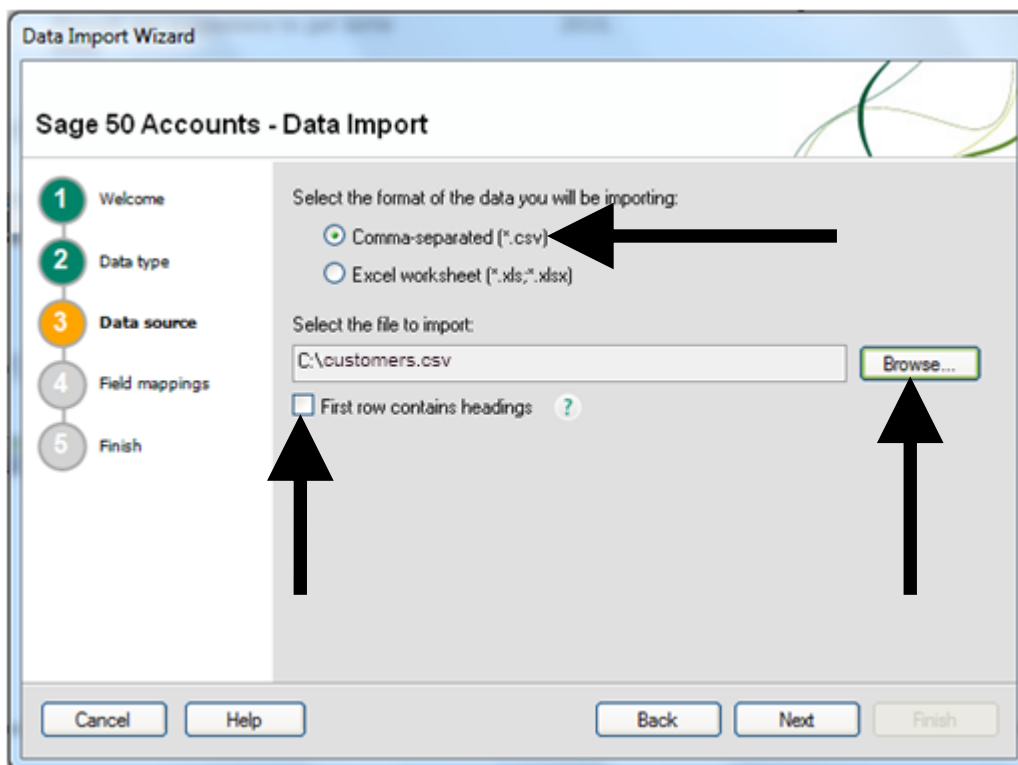
Click **Next** once the backup is complete

Select **Customer Records** from the list



Click **Next** to continue

Select the **Comma-separated (*.csv)** option



Ensure that **No Tick** is present in the **First row contains headings** option

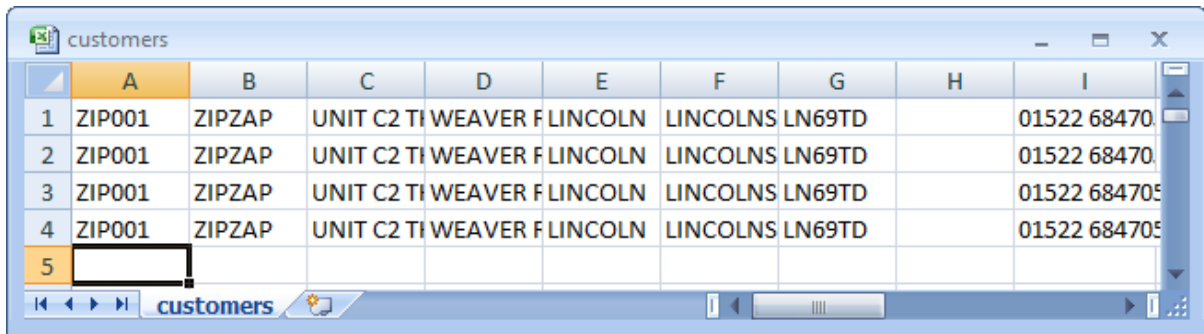
Click on **Browse** to select the **Customers** file that you wish to import

NOTE: Ensure the CSV filename is all in lowercase (Example - customers.csv)

Click **Next** to continue.

Sage 50 Accounts now wants you to set up the field mappings. Start at the top of the list and select A then for the next line down select B and so on until you reach I which should be Telephone Number.

Example Below



	A	B	C	D	E	F	G	H	I
1	ZIP001	ZIPZAP	UNIT C2 TH WEAVER F	LINCOLN	LINCOLNS	LN69TD			01522 684705
2	ZIP001	ZIPZAP	UNIT C2 TH WEAVER F	LINCOLN	LINCOLNS	LN69TD			01522 684705
3	ZIP001	ZIPZAP	UNIT C2 TH WEAVER F	LINCOLN	LINCOLNS	LN69TD			01522 684705
4	ZIP001	ZIPZAP	UNIT C2 TH WEAVER F	LINCOLN	LINCOLNS	LN69TD			01522 684705
5									

CSV format for the example above would be:

Column A = Account Reference

Column B = Account Name

Column C = Street 1

Column D = Street 2

Column E = Town

Column F = County

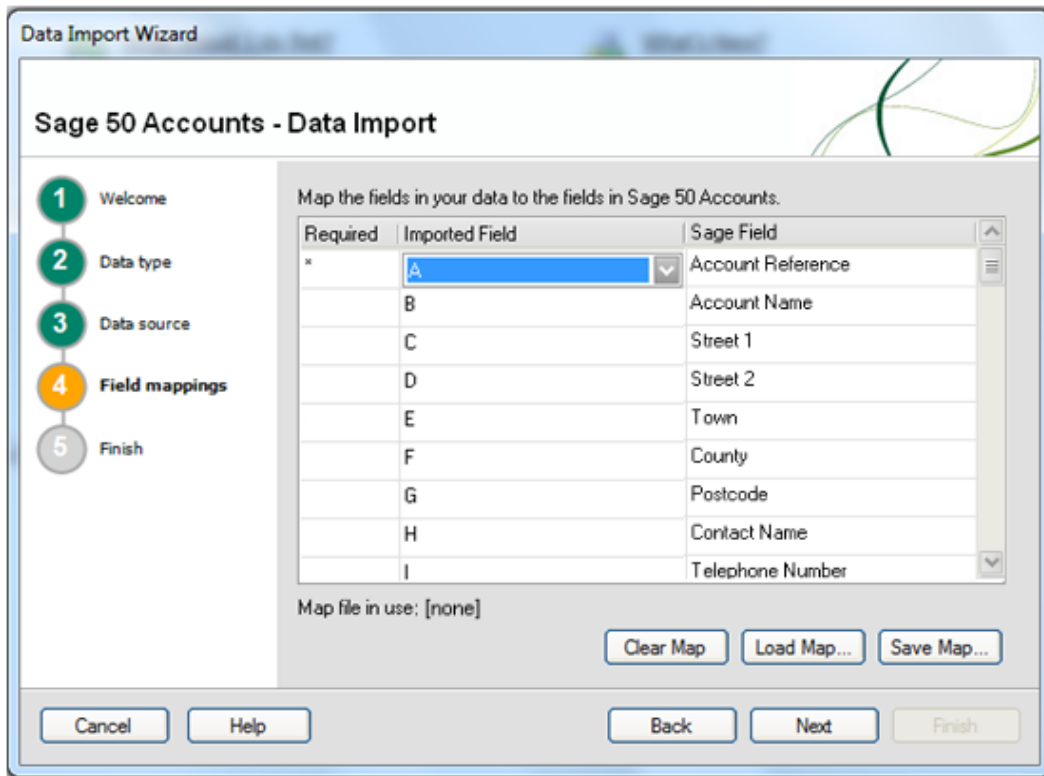
Column G = Postcode

Column H = Contact Name

Column I = Telephone Number

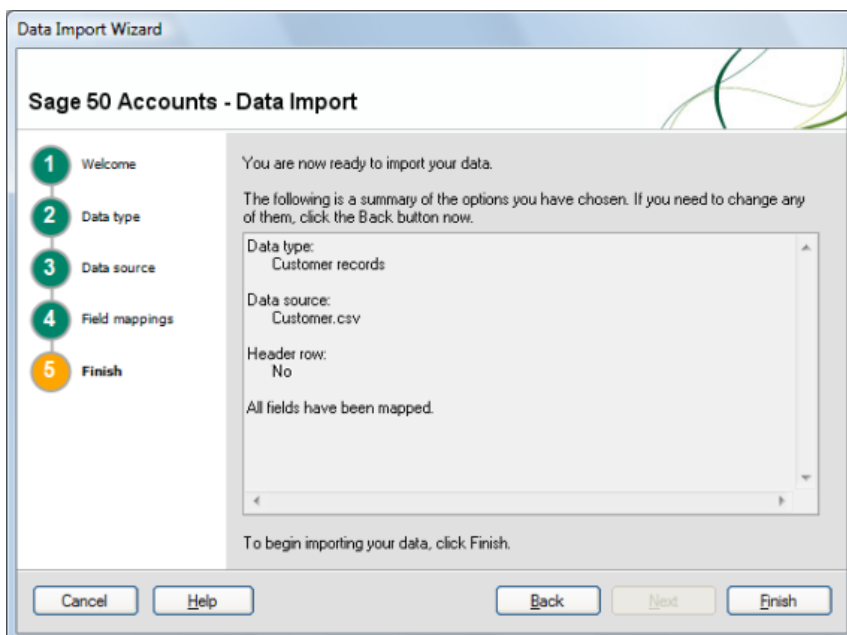
NOTE: For the customers file, you should only map fields A to I (Telephone number being the last field)

Select each column you require to the correct **Sage field**



Once you are done, click on the **Save Map** button to make a copy of the map you have just created.

Click **Next** to Continue



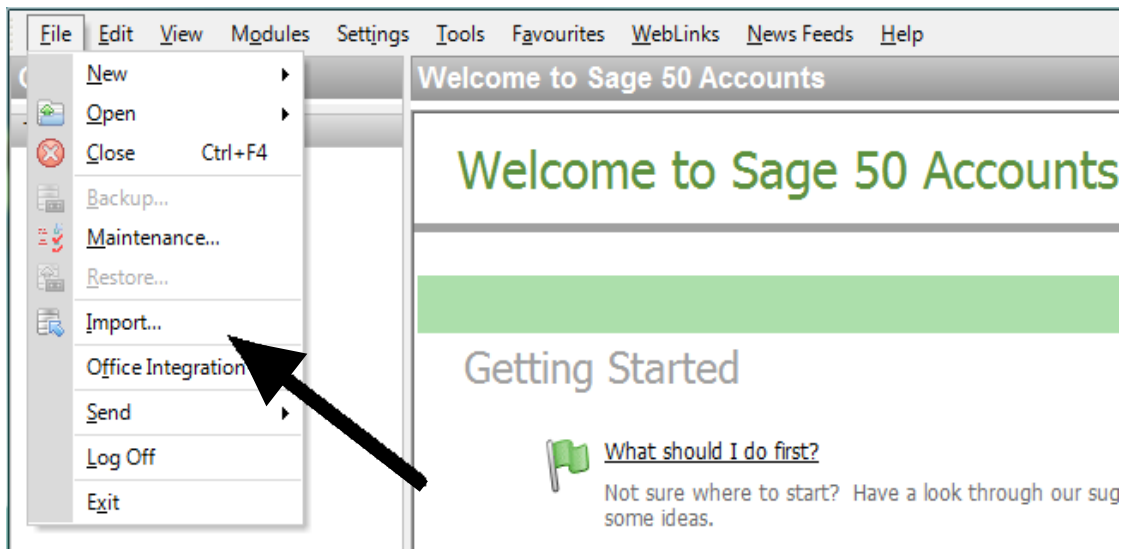
If you are happy with the summary that you are presented with, click on **Finish** and your file will be imported.

NOTE: Next time you use the routine it will remember the mappings that you have used previously.

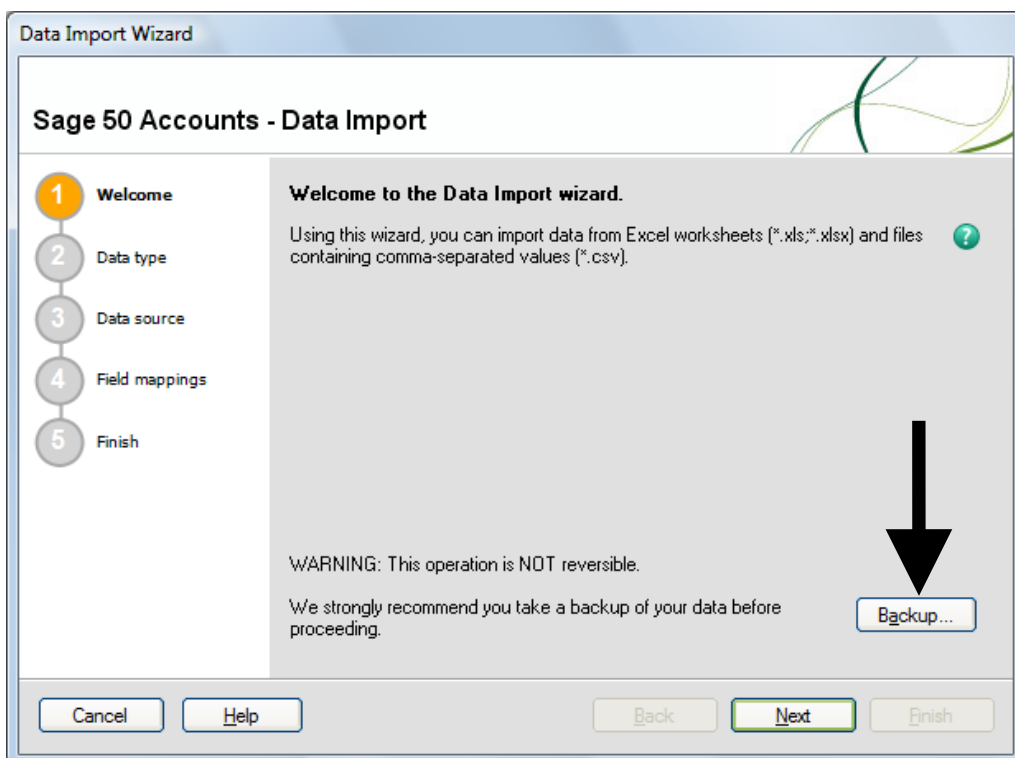
Import Audit Trail Transactions

In Sage 50 Accounts 2010+ when you go to import the Audit Trail Transactions file, you now have to map the fields in the file to the fields in Sage.

Click **File**



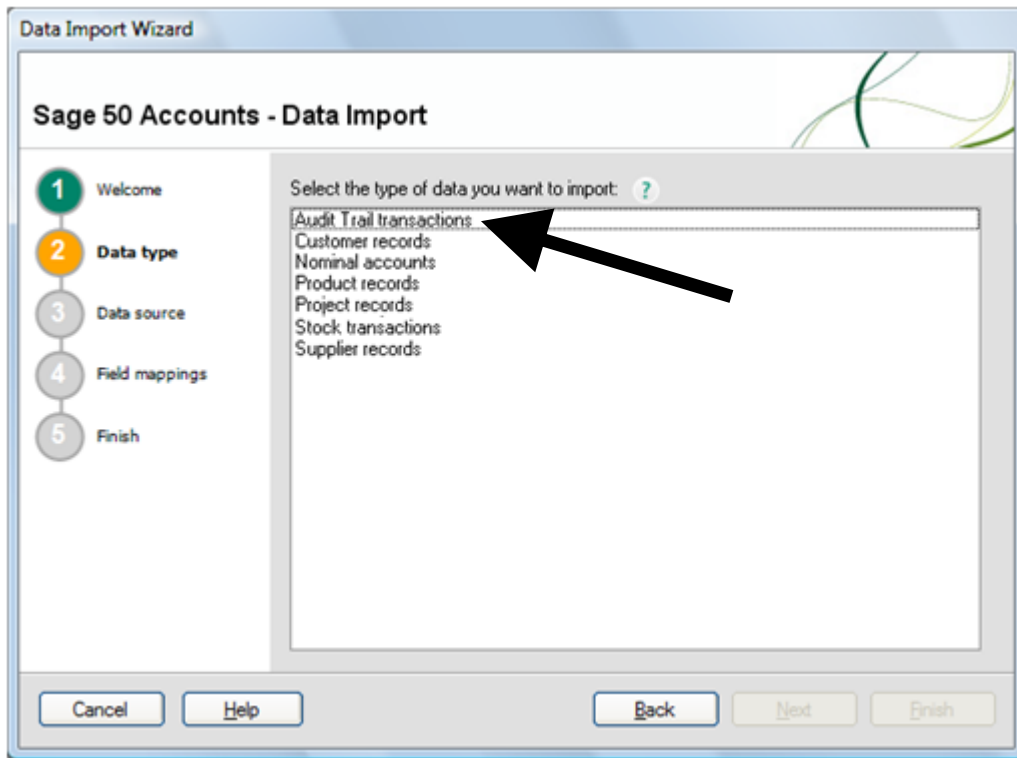
Select **Import** and the **Data Import Wizard** will emerge



Click on **Backup** to make a backup of your data first.

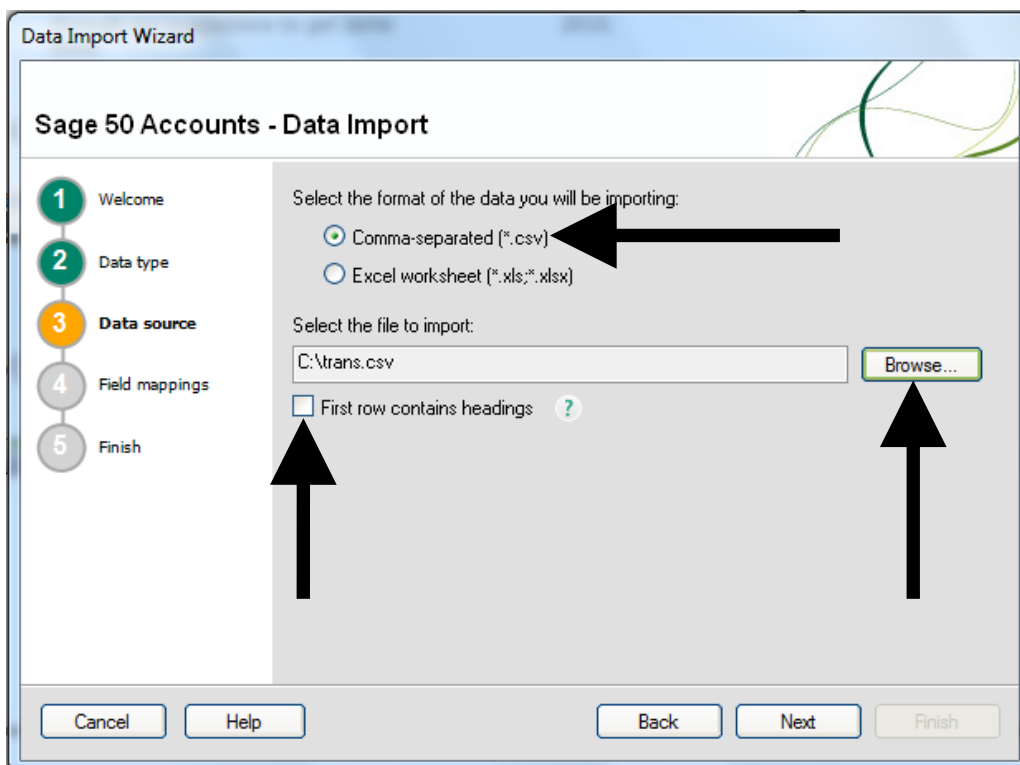
Click **Next** once the backup is complete

Select **Audit Trail Transactions** from the list



Click **Next** to continue

Select the **Comma-separated (*.csv)** option



Ensure that **No Tick** is present in the **First row contains headings** option

Click on **Browse** to select the **Audit Trail Transactions** file that you wish to import

NOTE: Ensure the CSV filename is all in lowercase (Example - trans.csv)

Click **Next** to continue.

Sage 50 Accounts now wants you to set up the field mappings. Start at the top of the list and select A then for the next line down select B and so on until you reach J which should be Tax Amount. The last 5 Sage 50 Accounts Fields should have no field or letter associated with it.

Example Below

	A	B	C	D	E	F	G	H	I	J	K
1	SI	ZIP001	4000		1102010	5062	Monthly Support	50	T1	8.75	
2	SI	ZIP001	4000		1092010	5063	Monthly Support	50	T1	8.75	
3	SI	ZIP001	4000		1082010	5064	Monthly Support	50	T1	8.75	
4											
5											

CSV format for the example above would be:

Column A = Type

Column B = Account Reference

Column C = Nominal A/C Ref

Column D = Department Code

Column E = Date

Column F = Reference

Column G = Details

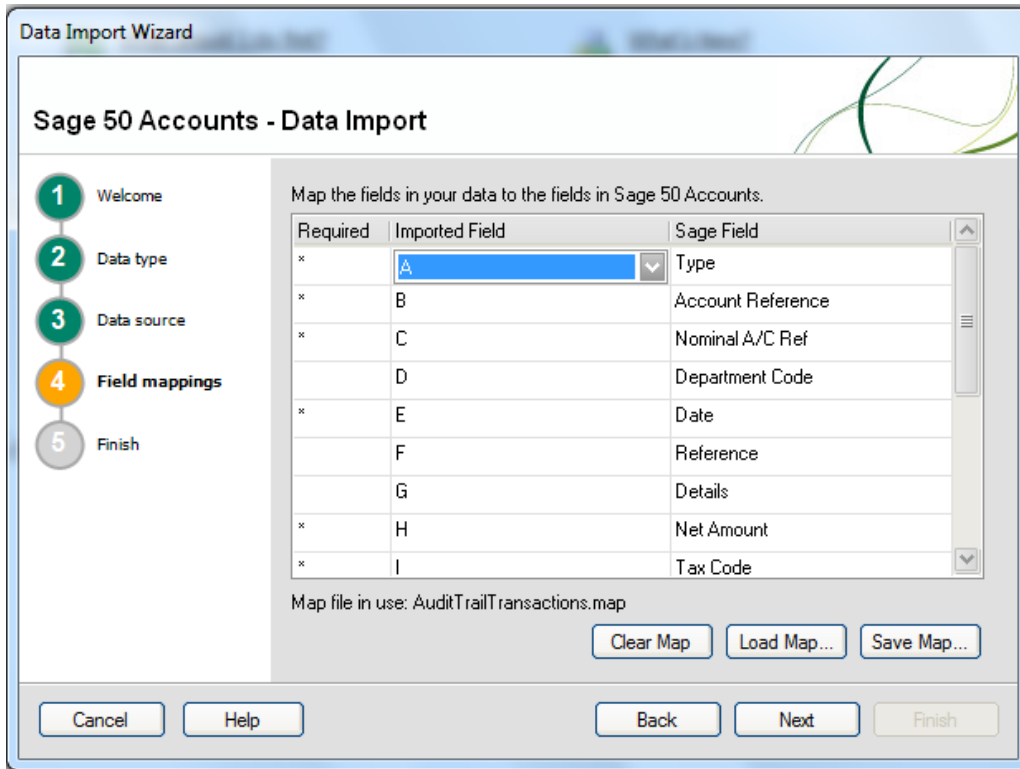
Column H = Net Amount

Column I = Tax Code

Column J = Tax Amount

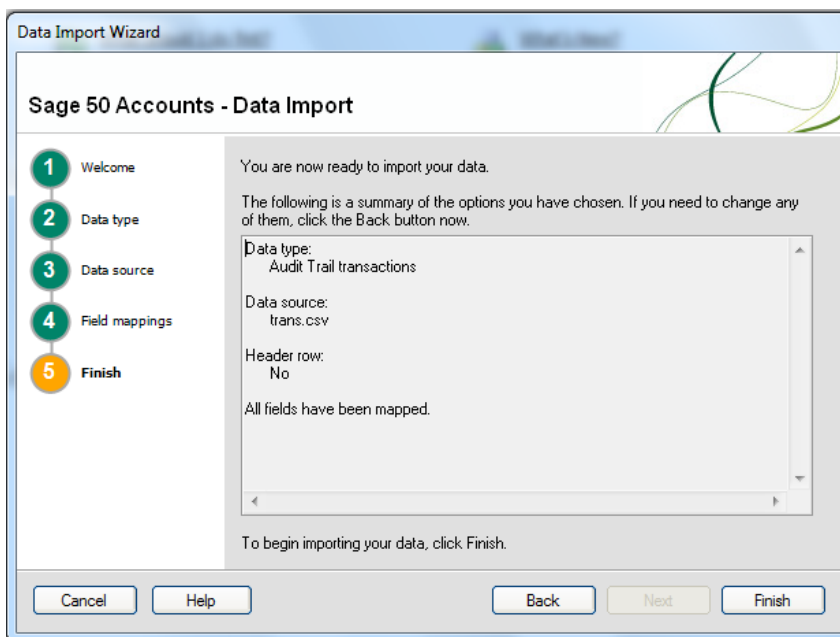
NOTE: For Audit Trail Transactions map fields A to J (Tax Amount being the last field)

Select each column you require to the correct **Sage field**



Once you are done, click on the **Save Map** button to make a copy of the map you have just created.

Click **Next** to Continue



If you are happy with the summary that you are presented with, click on **Finish** and your file will be imported.

NOTE: Next time you use the routine it will remember the mappings that you have used previously.

Errors When Importing

Be Aware:

If when importing data into Sage an error occurs or a warning emerges, this does not always mean the data has not been imported. Before re-attempting an import, please check the Sage records as duplicates could occur otherwise.

If errors do occur, they will need to be corrected in the CSV file before attempting an import again.

Deleting data from Sage is difficult, so it always best to perform a backup before running any import.

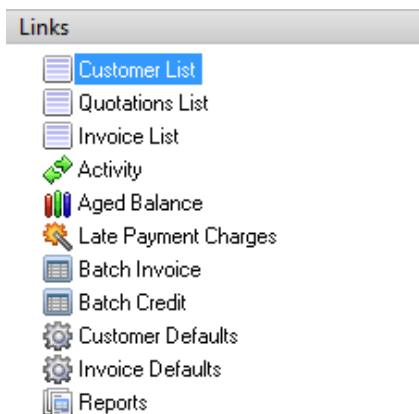
Exporting Customers from Sage 2008

Open **Sage**

Select **Customers**



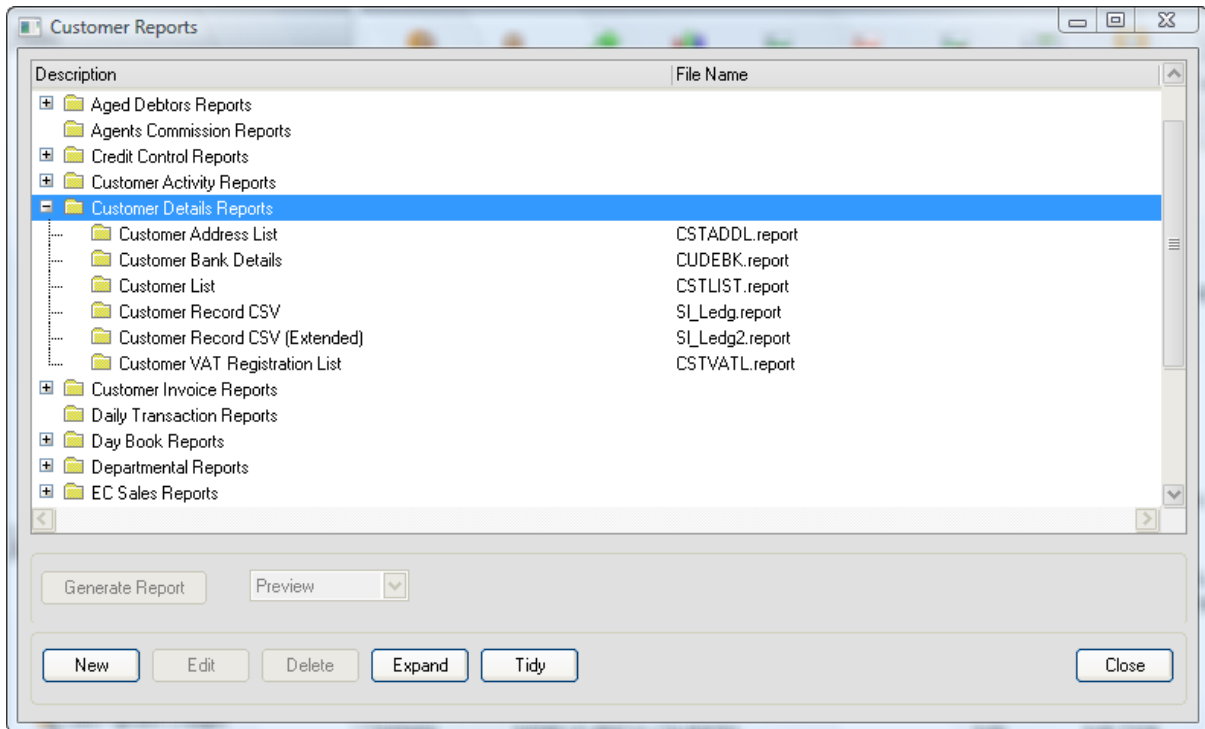
Select **Customer List**



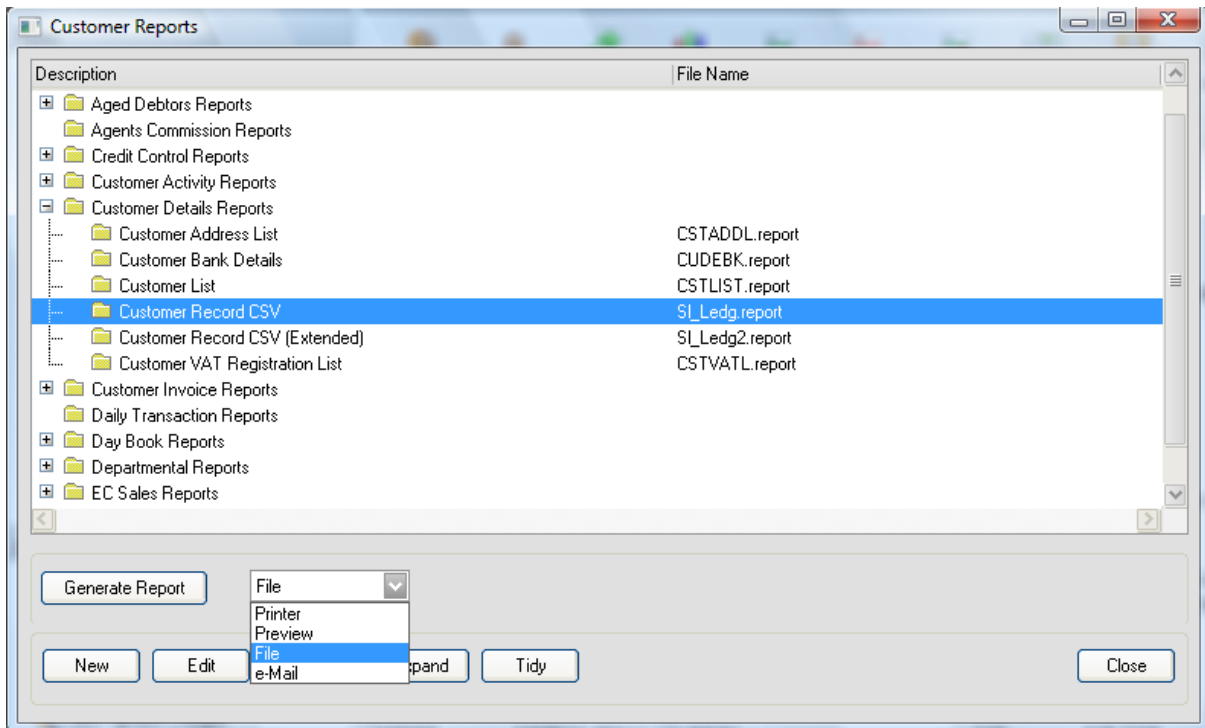
Select **Reports**



Collapse **Customer Details Reports** by clicking on the **Plus** sign



Select **Customer Record CSV**

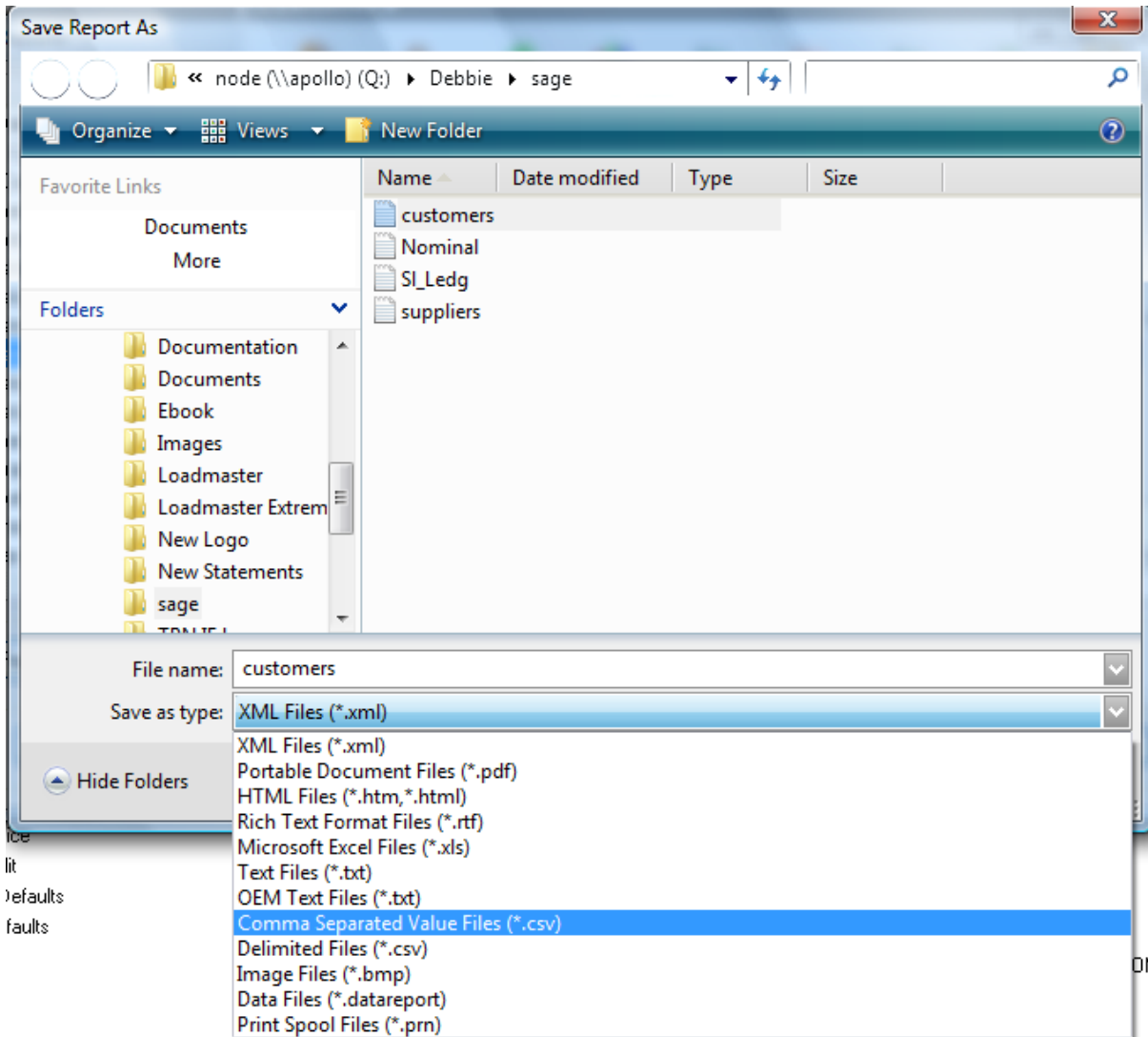


Select **File** from the pull down by click this button



Generate Report

Click **Generate Report**



Enter a **Name** for the file

NOTE: Ensure the CSV filename is all in lowercase (Example - customers.csv)

Select **Comma Separated Value File** from the pull down by click this button 

Choose a **Location** to save the file too.

Click **Save**