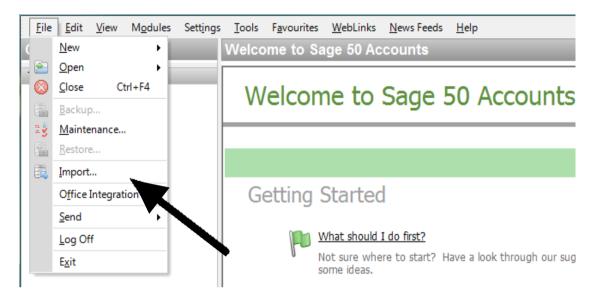
Import Customers

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

Data Import Wizard	
Sage 50 Accounts	- Data Import
(1) Welcome	Welcome to the Data Import wizard.
2 Data type	Using this wizard, you can import data from Excel worksheets (*.xls;*.xlsx) and files (*.cov).
3 Data source	
Field mappings	
5 Finish	L
	WARNING: This operation is NOT reversible.
	We strongly recommend you take a backup of your data before Backup
Cancel <u>H</u> elp	Back Next Enish

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

Click Next once the backup is complete

Select Customer Records from the list

Data Import Wizard Sage 50 Account	is - Data Import
1 Welcome	Select the type of data you want to import: ?
2 Data type 3 Data source 4 Field mappings 5 Finish	Audit Trail transactions Customer records Nominal accounts Project records Stock transactions Supplier records
Prish	
Cancel	Ap Back Next Brish

Click Next to continue

Select the Comma-separated (*.csv) option

Data Import Wizard	pr. man	
Sage 50 Accounts	- Data Import	K
1 Welcome	Select the format of the data you will be importing:	
2 Data type	Comma-separated (*.csv) Excel worksheet (*.xls;*.xlsx)	
3 Data source	Select the file to import:	
Field mappings	C:\customers.csv First row contains headings	Browse
Cancel Help	Back	Next Rnish

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

8	customers									x
	A	В	С	D	E	F	G	Н	- I	
1	ZIP001	ZIPZAP	UNIT C2 TI	WEAVER F	LINCOLN	LINCOLNS	LN69TD		01522 68470). 🗖
2	ZIP001	ZIPZAP	UNIT C2 TI	WEAVER F	LINCOLN	LINCOLNS	LN69TD		01522 68470).
3	ZIP001	ZIPZAP	UNIT C2 TI	WEAVER F	LINCOLN	LINCOLNS	LN69TD		01522 68470	05
4	ZIP001	ZIPZAP	UNIT C2 TI	WEAVER F	LINCOLN	LINCOLNS	LN69TD		01522 68470	05
5]								-
H	H → → H customers / 2						Г.#			

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

		s in Sage 50 Accounts.	
Required	Imported Field	Sage Field	1
×	A	Account Reference	
	В	Account Name	
	C	Street 1	
	D	Street 2	
	E	Town	
	F	County	
	G	Postcode	
	н	Contact Name	
	1	Telephone Number	1
		× A B C D E F G	* Account Reference B Account Name C Street 1 D Street 2 E Town F County G Postcode H Contact Name

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

Data Import Wizard	
Sage 50 Account	s - Data Import
1 Welcome	You are now ready to import your data.
2 Data type	The following is a summary of the options you have chosen. If you need to change any of them, click the Back button now.
3 Data source	Data type: Customer records
Field mappings	Data source: Customer.csv
5 Finish	Header row: No
	All fields have been mapped.
	۲
	To begin importing your data, click Finish.
Cancel <u>H</u> el	p <u>B</u> ack <u>Prinish</u>

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.

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.