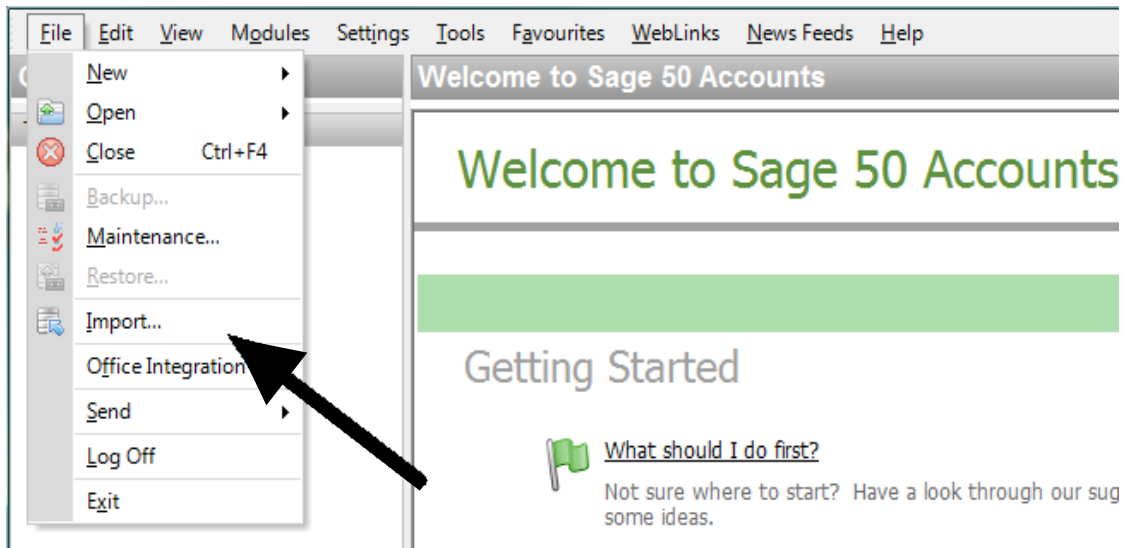


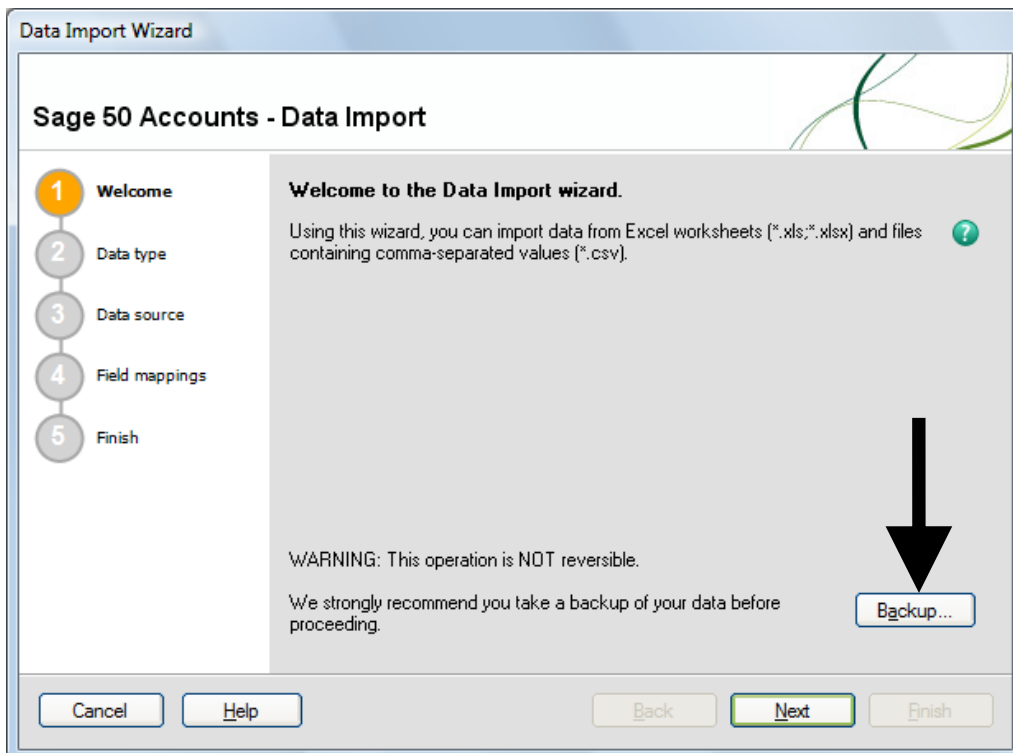
Import Customers

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**



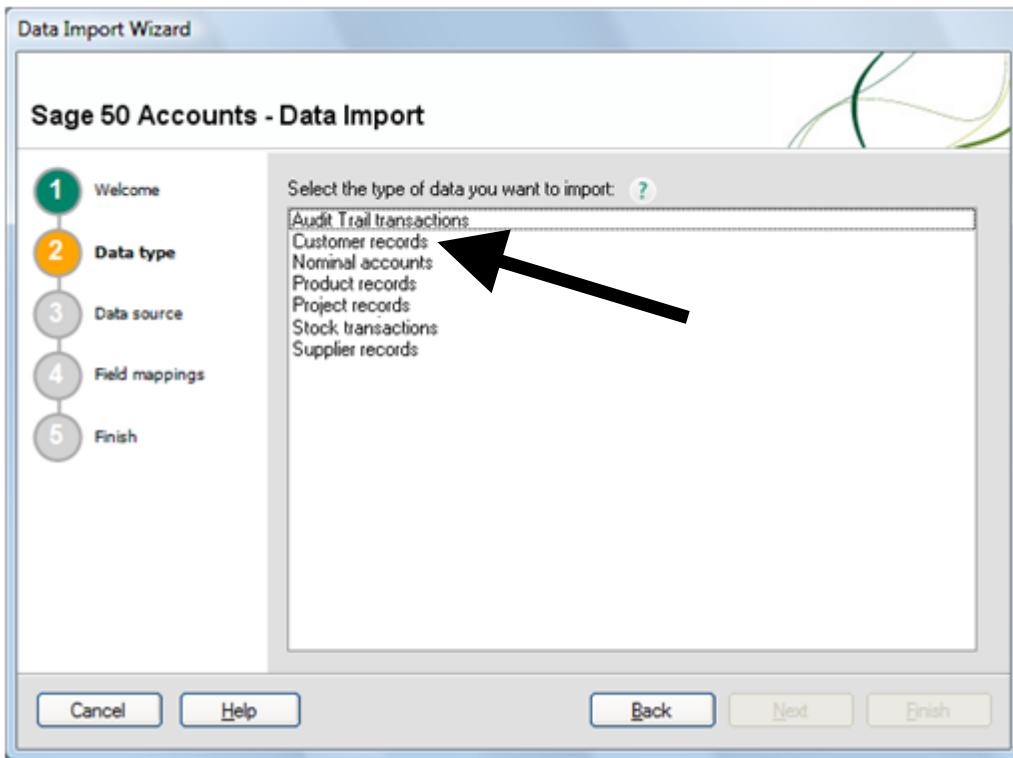
Select **Import** and the **Data Import Wizard** will emerge



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

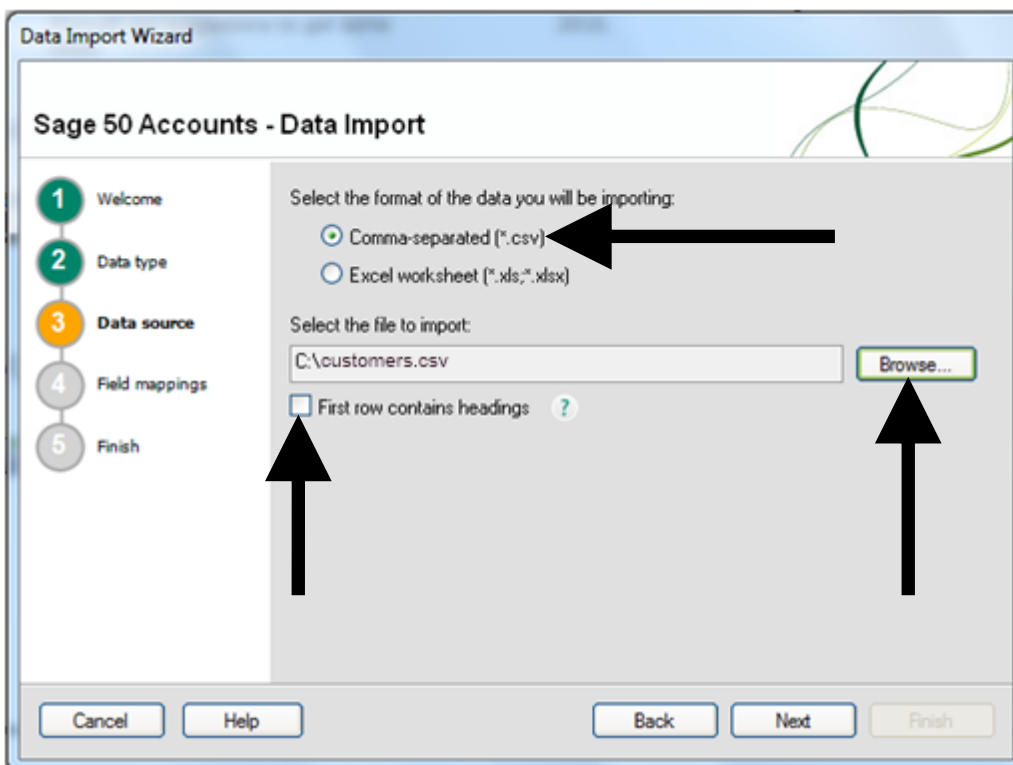
Click **Next** once the backup is complete

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

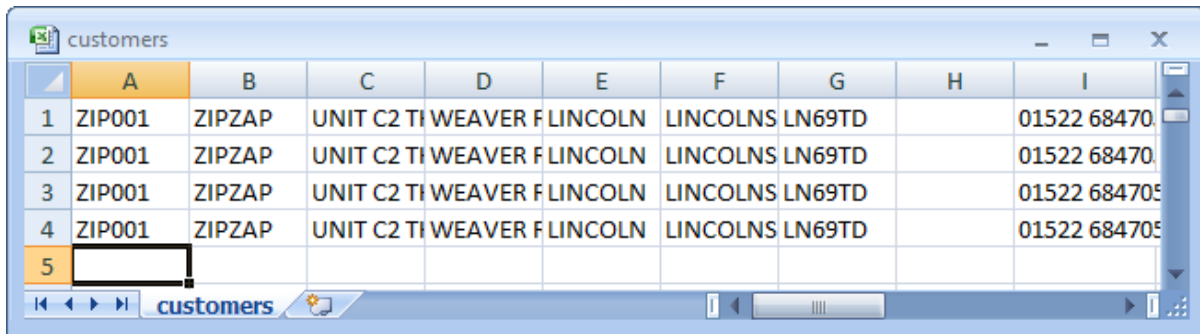
Click on **Browse** to select the **Customers** file that you wish to import

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 T	WEAVER F	LINCOLN	LINCOLNS	LN69TD		01522 68470
2	ZIP001	ZIPZAP	UNIT C2 T	WEAVER F	LINCOLN	LINCOLNS	LN69TD		01522 68470
3	ZIP001	ZIPZAP	UNIT C2 T	WEAVER F	LINCOLN	LINCOLNS	LN69TD		01522 68470
4	ZIP001	ZIPZAP	UNIT C2 T	WEAVER F	LINCOLN	LINCOLNS	LN69TD		01522 68470
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

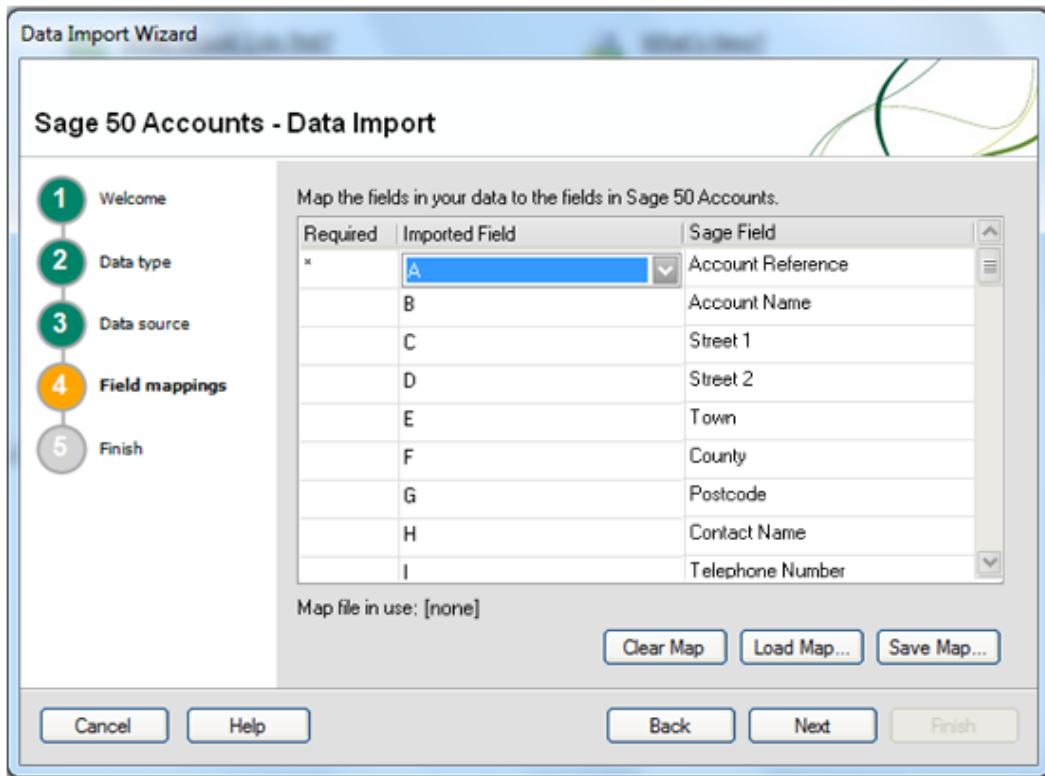
Column G = Postcode

Column H = Contact Name

Column I = Telephone Number

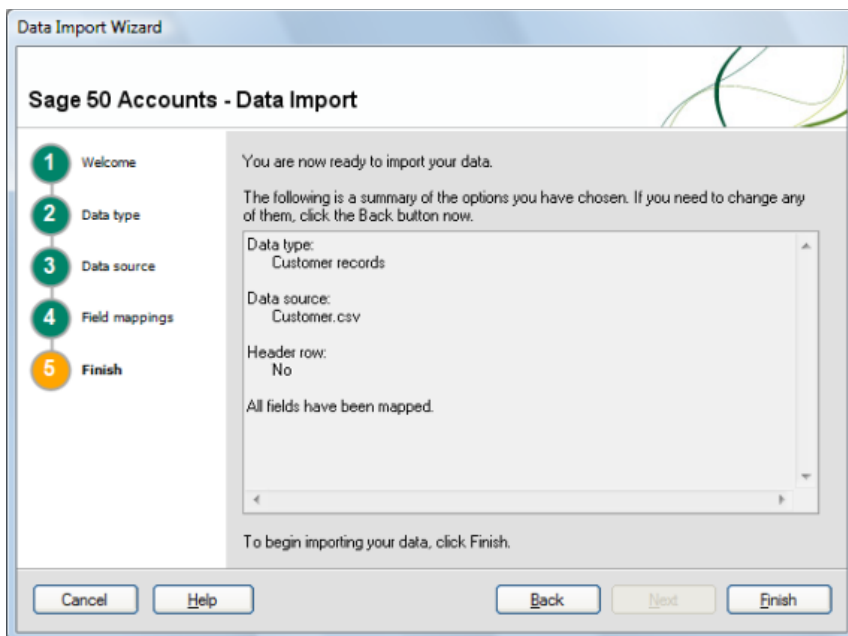
NOTE: For the customers file, you should only map fields A to I (Telephone number being the last field)

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.

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.