



Importing Standard Items in Sage BusinessWorks 2010

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 section.
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.

Standard item import format

Each record consists of up to 9 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 Standard Item ID ³	10	Any text. (Lowercase letters will be converted to uppercase during import.)
2 Description 1 ³	28	Any text.
3 Description 2	28	Any text.
4 Description 3	28	Any text.
5 Price A	9	Enter an amount between 0.01 and 999999.99 without commas or dollar signs.
6 Price B	9	Enter an amount between 0.01 and 999999.99 without commas or dollar signs.
7 Price C	9	Enter an amount between 0.01 and 999999.99 without commas or dollar signs.
8 Sales Account ⁴	3	Enter a code between 1 and 999.

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 standard item, no prefix is required. If /U is used, Sage BusinessWorks will update an existing standard item or add a new one if that standard item ID does not exist. /C will change existing standard item IDs only. /D will delete a standard item ID.

³ Required fields when adding a new standard item ID.

⁴ If you have G/L accounts for this company, a valid G/L account number must first be defined for all Sales Accounts used during the import process.

Standard item 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 Standard Item ID does not already exist.

```
/ADD,"1001","26 inch bicycle-boy's",,,,"250.00","125.00","105.00","1"<cr><lf>
```

```
/A,"396-1010","Tire-26 inch",,,,"7.25","5.80","5.00","3"<cr><lf>
```

- Notice the extra commas after the first description 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 fields 3 and 4. Without this comma, Sage BusinessWorks would import “250.00” as Description Line 2, “125.00” as Description Line 3, and so on.
- In this example, the description field is enclosed in quotation marks because it contains a comma. Without the quotation marks, Sage BusinessWorks would attempt to import “boys” into Description 2, blank into Description 3, blank into Price A, etc.

2. **Updating a record.** If the standard item ID “1001” already exists in this company, Sage BusinessWorks will update that standard item with information from this import record. If this standard item doesn’t exist in this company, Sage BusinessWorks will add it.

```
/UPDATE,"1001","26 inch bicycle-boy's",,,,"250.00","125.00","100.00","1"<cr><lf>
```

```
/U,"1002","24 inch bicycle, girl's"<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 standard item ID “1002” exists, Sage BusinessWorks will update the record with a new price. Otherwise, the record will be ignored during the import process.

```
/CHANGE,"1002",,,,,,,,,,"225.00"<cr><lf>
```

```
/C,"396-1030","21 inch tire"<cr><lf>
```

4. **Deleting a record.** Enter the “deleting” prefix followed by the ID to delete.

```
/DELETE,"1004"<cr><lf>
```

```
/D,"396-1020"<cr><lf>
```

5. **Renaming a record.** Enter the “renaming” prefix, original ID, and new ID. In the record below, the standard item ID “SPOKE” will be changed to “SPOKE-02”.

```
/RENAME,"SPOKE","SPOKE-02"<cr><lf>
```

```
/R,"SHORTS-RED","MNSHORTS-RED"<cr><lf>
```