Importing Records Sage 50 Accounts.

Michael Cox

Sage

Contents

Introduction

Prepare your data

Demonstrations

Troubleshooting – when things don't quite go to plan

Further support

Importing Records.

Why import?

If you have a large amount of data to enter, or you want to make changes to multiple records, you can save time by importing the information. This brings all the data into your software in one go, rather than manually entering each individual item.

Uses

- Add new data – Records / Transactions
- Update existing data – Records only

Benefits

- Saves time
- Flexible
- Avoids mistakes

How do I import data?

Sage

Importing Records.

What can you import?

- Records

- Transactions

Note
Options depend on your software variant

Importing Records.

Prepare your data

- File > Import > Sage Import Template

- Your own file
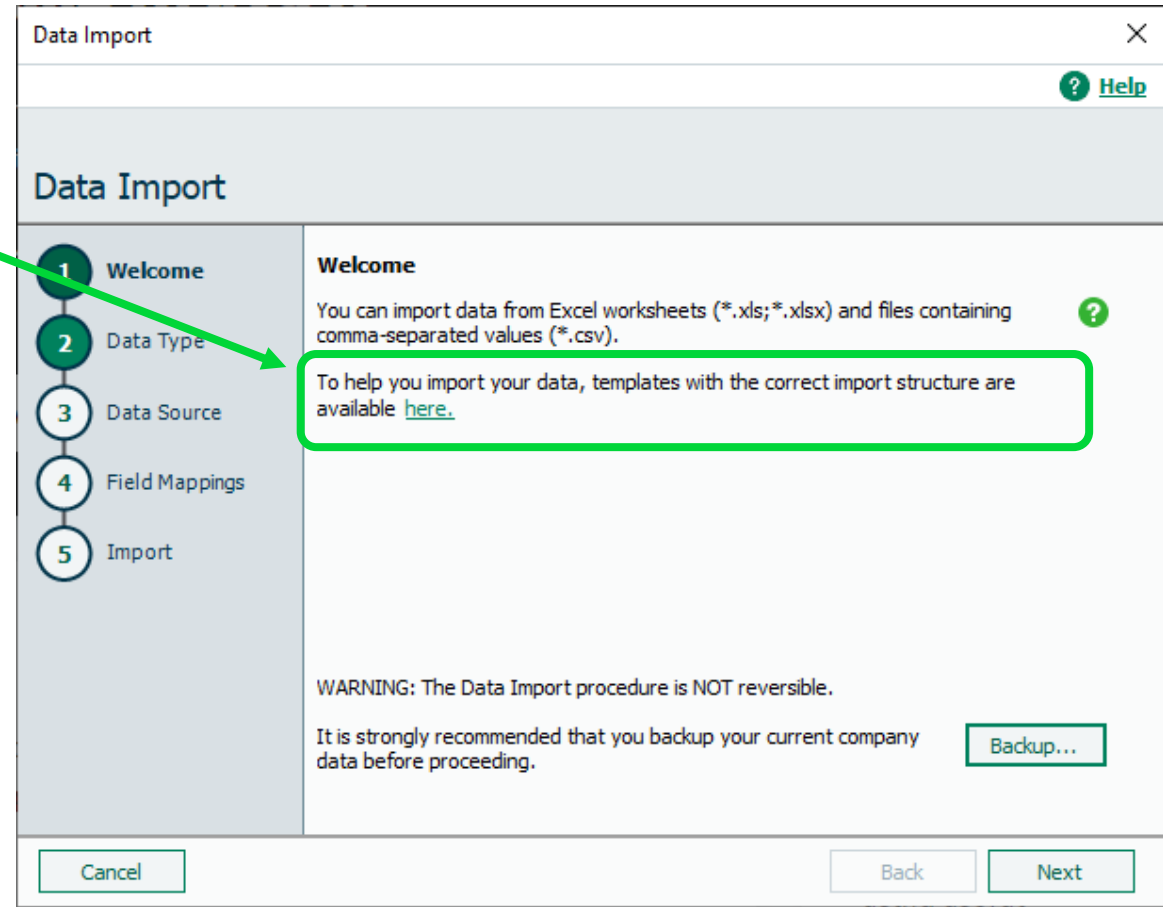
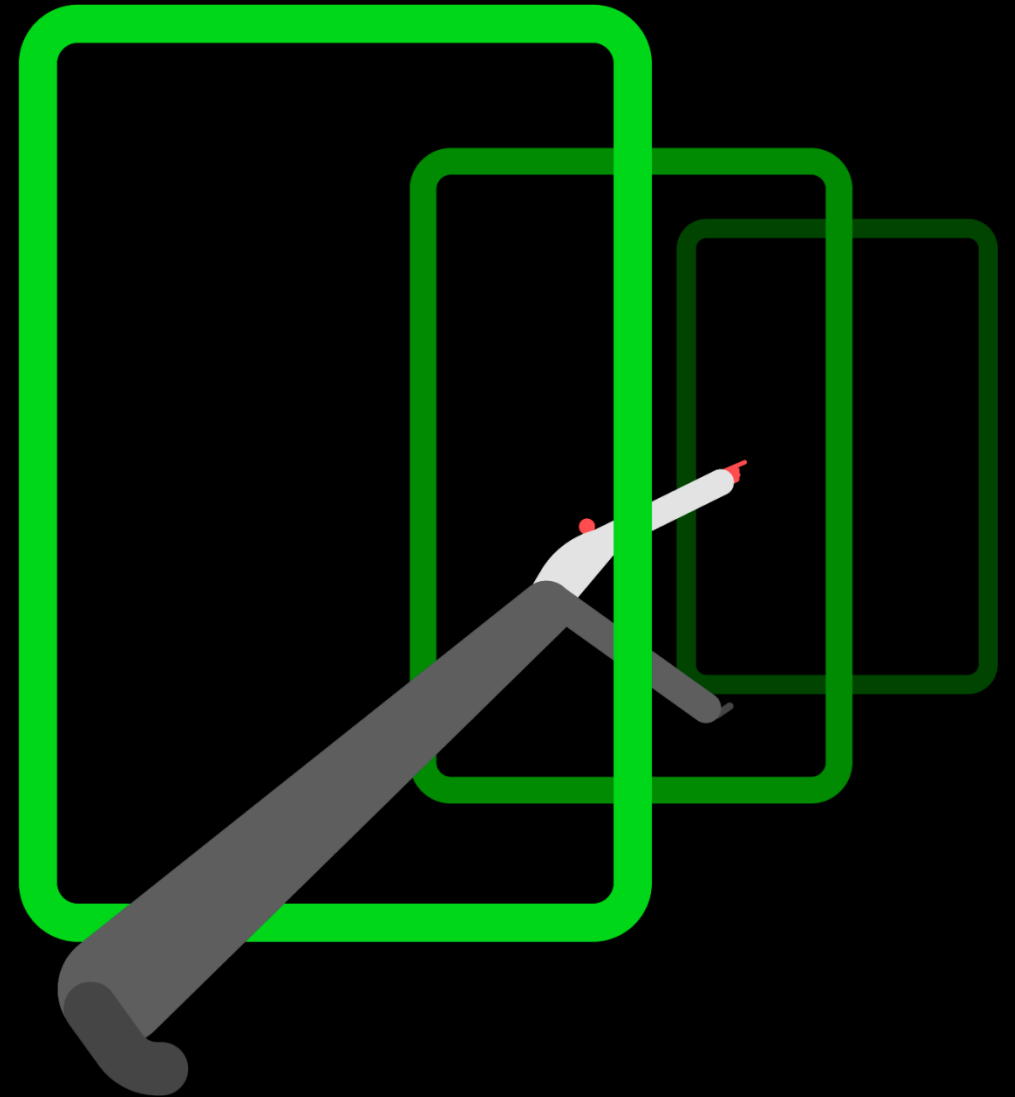# Demonstrations.

File > Import > Data Import Wizard

- Import new customer records

- Update existing customer records

<div style="background:#22C522;color:#000;padding:10px;">
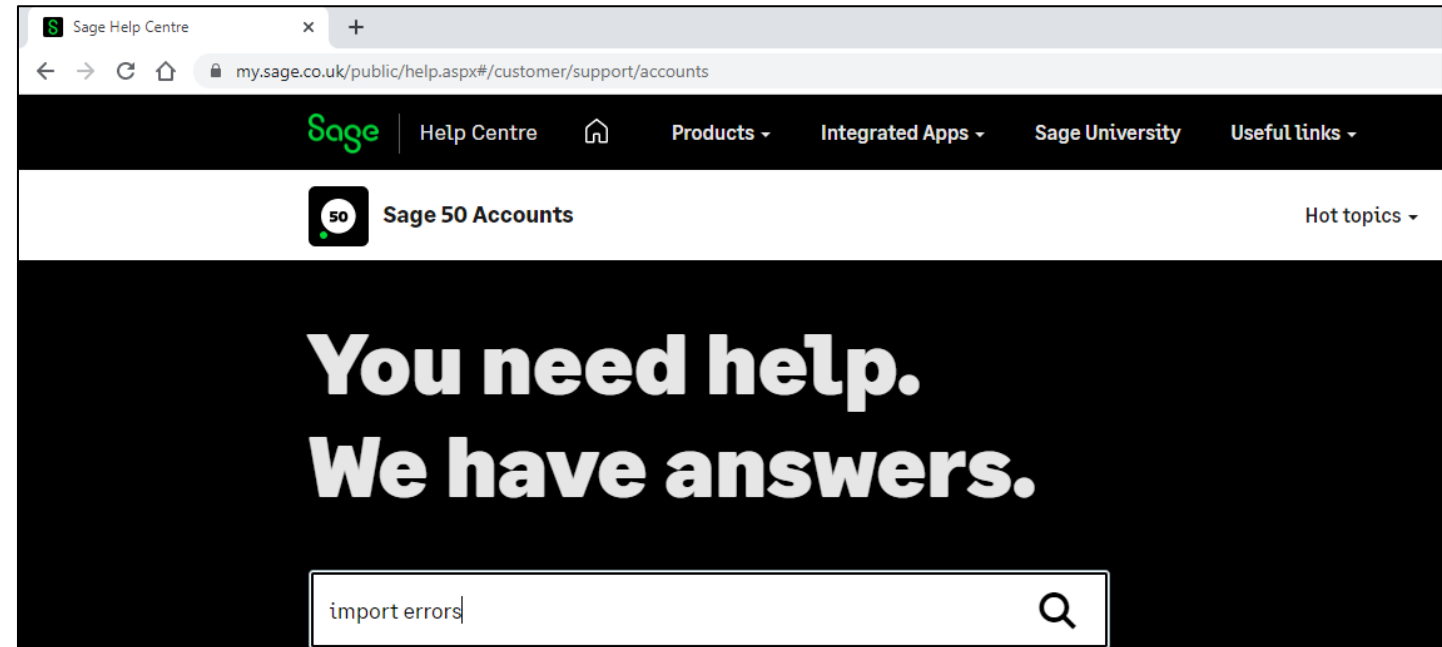
Import Wizard

</div>

Importing Records.

Troubleshooting – when things don't quite go to plan

- If an import fails > check the Sage Help Centre

Common issues

- Import file still open
- Illegal Sales/Purchase Ledger Account Reference
- Blank line

Import Errors

Upcoming Webinars

Upcoming	Key Topics	
VAT Return	**User Management**	**What's new in v29**
Nominal Records	Wed 15 Mar 2pm	Thurs 16 March 2pm + Others
Company Credit Cards & Employee Expenses		
Year End	**Importing Transactions**	
Customer & Supplier Defaults	Recording available – **Watch now >**	

Sage

Thank you!

Please take a minute to complete the short exit survey as you leave.

You'll receive a follow-up email later today.
This includes links to register for future webinars and to watch recordings.

Sage