Exporting Forest to SAGE 2012

- In Forest / AGM set you accounts package in Company details ... Accounts.
- In Forest / AGM run your batch report
- Go into SAGE
- File
- Import
- 1. Welcome = Next (don't need to do anything on this screen)
- 2. Data Type = Customer records
- Next
- Select Comma-separated (*.csv)
- Click Browse to find the files to import which will be in the location you previously selected from within Forest / AGM
- Pick up the exported Forest customer record file (FSCUS**.CSV)
- Open
- First row contains headings = <u>Tick</u>
- Next
- Load Map
- Customer records
- Open
- Next
- Finish
- The files will now import
- Check the next screen to make sure there are no errors. If there are any issues, these will be reported and it will identify the line number on the CSV file that it has found the problem on. You will need to check the line in the CSV file and amend, resave and then attempt to import again
- Providing no errors were found you can continue to the next step
- Stay in SAGE
- File
- Import
- 1. Welcome = Next (don't need to do anything on this screen)
- 2. Data Type = Audit Trail transactions
- Next
- Select Comma-separated (*.csv)

- Click Browse to find the file to import
- Pick up the exported Forest customer record file (FSTRN**.CSV)
- Open
- First row contains headings = Un-tick
- Next
- Load Map
- Audit Trail transactions
- Open
- Next
- Finish
- The files will now import
- Check the next screen to make sure there are no errors. If there are any issues, these will be reported and it will identify the line number on the CSV file that it has found the problem on. You will need to check the line in the CSV file and amend, resave and then attempt to import again
- If no errors are reported you can close