

Batch delete old customers (works for Vendors as well)

Step 1
A: Create Export file to Excel Worksheet.

In BW Ver 12 , go to A/R Transfer, Export Customer Information.

In BW Gold, go to A/R Transfer Custom Worksheets

And then create the export file

The customer ID is the only field you need to export

OutLine ID: CUSTOMER
Description: CUSTOMER LIST
Type of information: Customer
Past due criteria: No past due criteria
 Include all customers
From: [] to: []

Exportable Items: Blank, Customer ID, Customer name, Address, line 1, Address, line 2, City and State, ZIP code
Items that will be Exported: Customer ID

B: Name the file Customer.xls

Make a note of the path to the file. In this example it is D:\bw\sample

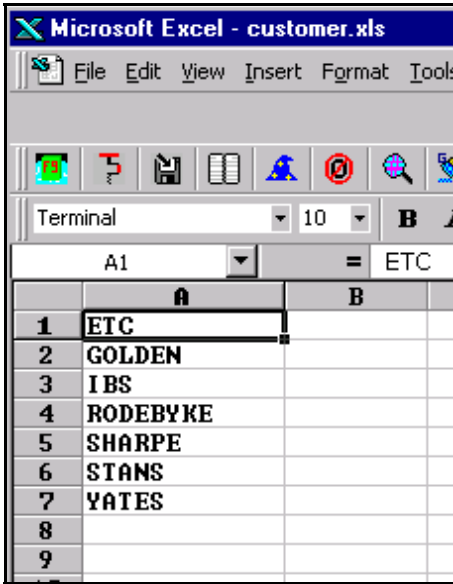
File name: customer.XLS
Directories: d:\bw\sample
Data Format: Excel 5.0 (XLS)
Drives: [d-]
 Column titles

	A	B
1	ETC	
2	GOLDEN	
3	IBS	
4	RODEBYKE	
5	SHARPE	
6	STANS	
7	YATES	
8		
9		

C: Open Excel and the customer.xls file you just created.

← The Excel file you created, will look like this.

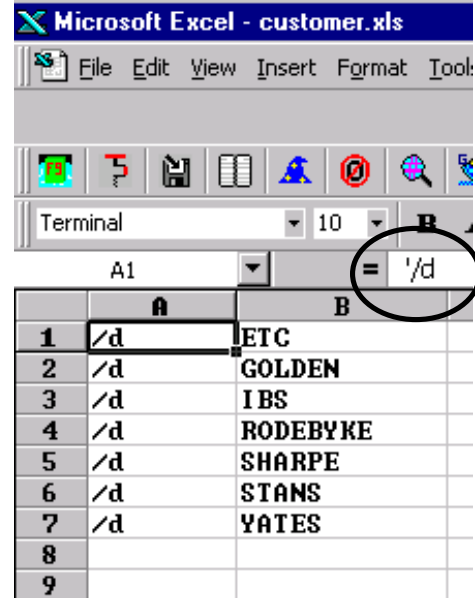
Step 2
Modify Export and Save As a CSV file.



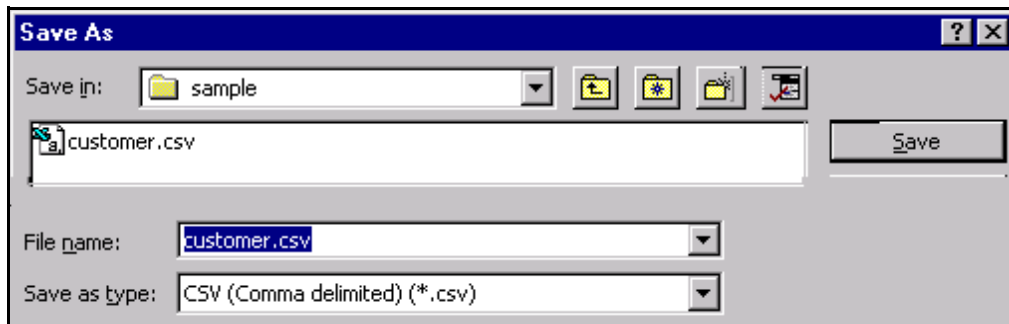
You modify the XLS file by inserting a column to the left of the name column.

Then (in the first row) enter '/d' Note the apostrophe. (Important)

Then copy row 1 down to all rows.



After modifying the Excel worksheet. You save it as Customer.xls Then you SAVE AS CUSTOMER.CSV BusinessWorks will import a CSV file, not an XLS file. It is best to save it to the BW folder for your company data.



Step 3
 Import .csv file back into BW , A/R, Transfer:
 Import Customer information

File must be named Customer.csv

Note: If a customer cannot be deleted, the import will stop. Click OK or ENTER on the keyboard to get past this. This is normal.

