



Sage 200 to Protean (Import)

Customers (Inc. those on hold)

Fields Updated on Creation Only

- Alpha
- Status (Set to Active)
- Currency
- Tax Code

Fields Updated on Creation and Updated

- Name
- Address (Inc County if setup)
- Country
- Fax Number
- Web Address
- Email Address
- Payment Terms (based on Sage payment terms)
- Telephone Number
- VAT Registration Number
- Credit Limit (in Customer Currency)
- Account Balance
- Pending Balance is Zeroed
- Credit Hold Status (based on Sage "Account_On_Hold flag)

Suppliers

Fields Updated on Creation Only

- Alpha
- Currency
- Tax Code
- Status (Set to Active)

Fields Updated on Creation and Updated

- Name
- Address (Inc County if setup)
- Country
- Fax Number
- Web Address
- Email Address
- Payment Terms (based on Sage payment terms)
- Telephone Number
- VAT Registration Number



Nominals (General Ledger Accounts)

Fields Updated on Creation Only

- Nominal Account Codes & Description
- Cost Centre Codes & Description
- Department Codes & Description

Protean to Sage 200 (Export)

Customers (Only those on Active status)

Fields Updated on Creation Only

- Alpha (truncated to 8 Chars)
- Currency
- Tax code
- Country (Sage default if not present in Protean)
- Email address

Fields Updated on Creation and Updated (If Customer not On Hold in Sage)

- Name
- VAT Registration Number
- On Hold (based on Protean credit hold status)
- Credit Limit (in Customer Currency)
- Address (Inc County if setup)
- Telephone Number
- Fax Number
- Web Address

Suppliers (Only those on Active status)

Fields Updated on Creation Only

- Alpha (truncated to 8 Chars)
- Currency
- Tax code
- Country (Sage default if not present in Protean)

Fields Updated on Creation and Updated (If Supplier not On Hold in Sage)

- Name
- VAT Registration Number
- Address (Inc County if setup)
- Telephone Number
- Fax Number
- Email Address
- Website Address