

Here is a list of all the fields that could be imported into a client/name record in a SmartWeal data file. See the information at the end of this list, for an explanation of how this list can guide you in creating an export file to import into SmartWeal.

1	FCNAME	Character 32000	1	Yes/Empty.	Full name of client
2	FCCODE	Character 10	2	Yes/Empty.	Client Code
3	FCADDR1	Character 640	None	Yes/Empty.	Client Address (except city, postal code, etc.)
4	FCSSTSTATUS	Character 1	None	Yes/Empty.	Sales tax status: eXempt or Taxable
5	FCPCODE	Character 16	None	Yes/Empty.	Client postal code
6	FCONTAC	Character 32000	None	Yes/Empty.	Name of contact person for institutional or corporate client
7	FCEXTHOME	Character 5	None	Yes/Empty.	Extension (if any!) for home phone
8	FCPHONHOME	Character 14	None	Yes/Empty.	Home phone number
9	FCEXTWORK	Character 5	None	Yes/Empty.	Extension (if any) for work phone
10	FCPHONWORK	Character 14	None	Yes/Empty.	Work phone number
11	FCCITY	Character 320	None	Yes/Empty.	City and province/state of client address
12	FCDATEA	Short date 1980..2079	None	Yes/Empty.	Date of first contact with client/prospect
13	FCDATEL	Short date 1980..2079	None	Yes/Empty.	Date of most recent contact with client/prospect
14	FCDATEN	Short date 1980..2079	None	Yes/Empty.	Date of next planned contact with client/prospect
15	FCDATEZ	Short date 1980..2079	None	Yes/Empty.	
16	FCNOTE1	Character 32000	None	Yes/Empty.	General notes about client
17	FCGSTSTATUS	Character 1	None	Yes/Empty.	Exempt from G.S.T. = X; Taxable = T
18	FCPAYEE	Boolean	3	Yes/Empty.	YES = Include among list of payees, in accounts payable entry window
19	FCCODE2	Character 1	None	Yes/Empty.	Level of dedication to firm (1 -> 9)
20	FCTAXNUM	Character 20	None	Yes/Empty.	Client tax or other number
21	FCEXTFAX	Character 5	None	Yes/Empty.	Extension (if any!?) for fax
22	FCFAX	Character 14	None	Yes/Empty.	Fax number
23	FCSALUTATION	Character 64	None	Yes/Empty.	Salutation on any letters
24	FCSELECT	Boolean	10	Yes/Empty.	"Selected" client (for report and searching purposes)
25	FCSEQNO	Sequence	0	Yes/Empty.	Internal sequence number
26	FCBILLTYPE	Character 1	None	Yes/Empty.	Client's preferred format for bills/accounts
27	FCMARKETTYPE	Character 1	None	Yes/Empty.	Y, E, S, A or D
28	FCEXTOTHER	Character 5	None	Yes/Empty.	Extension for cell phone
29	FCOTHERPHONE	Character 14	None	Yes/Empty.	Telephone number for cellular or other phone
30	FCWITHHOLDCAT	Short integer	(0 to 255)	None	Yes/Empty. NZ – Withholding tax category
31	FCSPECIALTAXRATE	Number 3 dp	None	Yes/Empty.	Special tax rate (if any) - mainly for non-maritime provinces charging H.S.T. to maritime clients
32	FCREFERLAWYER	Character 3	8	Yes/Empty.	Initials of attorney/lawyer who referred this client to the firm
33	FCSPECIALTAXNAME	Character 6	None	Yes/Empty.	Name (if any) for special "foreign" tax rate for this client (usually, H.S.T.)
34	FCTOTUNBILL	Number 2 dp	None	Yes/Empty.	Total value of unbilled work in progress for the client
35	FCTOTBILLED	Number 2 dp	None	Yes/Empty.	Total value of all billed work in progress for the file
36	FCSUPPRESSSTMT	Boolean	None	Yes/Empty.	On if statements for this client are to be suppressed
37	FCSUPPRESSINT	Boolean	None	Yes/Empty.	On if interest charges on overdue accounts are to be suppressed for this client's files.
38	FCGLLIST	List	None	Yes/Empty.	Default G/L accounts, amounts and descriptions
39	FCINTERNET	Character 40	20	Yes/Empty.	Internet (e-mail) address
40	FCFAMNAME	Character 80	None	Yes/Empty.	Familiar name for client (e.g., Mr Jim Smith, rather than SMITH, JAMES)
41	FCDEFEXPCODE	Character 16	None	Yes/Empty.	Default expense code (if this name is a payee)

42	FCISCLIENT	Boolean	4	Yes/Empty.	On if this is a client
43	FCISREGAGENT	Boolean	5	Yes/Empty.	On if this is a registry, government agency, or other agent commonly used by the firm
44	FCISLAWFIRM	Boolean	6	Yes/Empty.	On if this is a lawyer or law firm
45	FCISEXPERT	Boolean	7	Yes/Empty.	Expert or other professional resource
46	FCISPROSPECT	Boolean	9	Yes/Empty.	Prospect (for marketing activities)
47	FCINITIAL	Character 1	11	Yes/Empty.	First letter of client name
48	FCHOMELOCAL	Boolean	None	Yes/Empty.	on if it is a local call to this number
49	FCWORKLOCAL	Boolean	None	Yes/Empty.	on if it is a local call to this number
50	FCCELLOCAL	Boolean	None	Yes/Empty.	on if it is a local call to this number
51	FCFAXLOCAL	Boolean	None	Yes/Empty.	on if it is a local call to this number
52	FCTOLLFREE	Character 14	None	Yes/Empty.	Toll free number
53	FCEXTTOLLFREE	Character 5	None	Yes/Empty.	Extension (if any) for toll free number
54	FCISCUSCAT1	Boolean	12	Yes/Empty.	
55	FCISCUSCAT2	Boolean	13	Yes/Empty.	
56	FCISCUSCAT3	Boolean	14	Yes/Empty.	
57	FCISCUSCAT4	Boolean	15	Yes/Empty.	
58	FCISCUSCAT5	Boolean	16	Yes/Empty.	
59	FCISCUSCAT6	Boolean	17	Yes/Empty.	
60	FCISCUSCAT7	Boolean	18	Yes/Empty.	
61	FCISCUSCAT8	Boolean	19	Yes/Empty.	
62	FCUSINGLASTFIRST	Boolean	None	Yes/Empty.	On if using "last name, first name" format for name
63	FCPREFIX	Character 12	None	Yes/Empty.	Prefix, for familiar name
64	FCSUFFIX	Character 12	None	Yes/Empty.	Suffix, for familiar name
65	FCWEBSITE	Character 48	None	Yes/Empty.	URL of client web site
66	FCALTFAX	Character 14	None	Yes/Empty.	
67	FCALTFAXDESC	Character 20	None	Yes/Empty.	
68	FCALTPHONE1	Character 14	None	Yes/Empty.	
69	FCALTPHONE1DESC	Character 20	None	Yes/Empty.	
70	FCALTPHONE2	Character 14	None	Yes/Empty.	
71	FCALTPHONE2DESC	Character 20	None	Yes/Empty.	
72	FCALTPHONE3	Character 14	None	Yes/Empty.	
73	FCALTPHONE3DESC	Character 20	None	Yes/Empty.	
74	FCALTINTERNET	Character 40	None	Yes/Empty.	
75	FCALTINTERNETDESC	Character 20	None	Yes/Empty.	
76	FCFIRSTNAME	Character 80	None	Yes/Empty.	Individual's first name (optional field)
77	FCLASTNAME	Character 80	None	Yes/Empty.	Individual's last name (optional)
78	FCCOMPANYNAME	Character 80	None	Yes/Empty.	Contact's business/firm/company name (optional)
79	FCPAYCLEARLIST	List	None	Yes/Empty.	Payables clearing list for names that are payees
80	FCALTADDR1	Character 640	None	Yes/Empty.	First part of alternate address
81	FCALTCITY	Character 320	None	Yes/Empty.	City and Province/State for alternate address
82	FCALTPCODE	Character 16	None	Yes/Empty.	Postal code (zip code) for alternate address
83	FCALTCONTACT	Character 1000	None	Yes/Empty.	Contact person for alternate address
84	FCMAINADDRTYPE	Short integer	(0 to 255) None	Yes/Empty.	Type of main address (undefined, work, home, temporary, billing or other)
85	FCALTADDRTYPE	Short integer	(0 to 255) None	Yes/Empty.	Type of alternate address (undefined, work, home, temporary, billing, other)
86	FCDEFDISBCODE	Character 10	None	Yes/Empty.	Default disbursement code (for payables, if this is a payee)
87	FCBILLEDPIVOT	Number 2 dp	None	Yes/Empty.	"Pivot point" for comparison with total value of billed work in progress
88	FCUNBILLPIVOT	Number 2 dp	None	Yes/Empty.	"Pivot point" for comparison with total value of unbilled work in progress
89	FCDATEADDED	Date and time	(#FDT) 21	Yes/Empty.	Date and time name added
90	FCINITADDED	Character 3	None	Yes/Empty.	Initials of person who added this name
91	FCLIENTGROUP	Character 20	22	Yes/Empty.	Group of related individuals or companies to which this client belongs

Different programs have different types of files, and different types of records in those files, and different types of individual fields in those different types of records. As you can see from the preceding list, SmartWeal has a large number of different fields in its client/contact records. Many of those fields are not in the client/contact records of other applications, and other applications will have fields that are not included in that list. Therefore, any export and import of data from one application to another will be incomplete, even though it might still be very helpful. That observation applies to the importing of other programs' data into SmartWeal. A reasonable and helpful (although not perfectly complete) import of data into SmartWeal should include as many as possible of the following fields (you may see that the ones in the following list are the ones that are marked in **bold type** in the above list):

- FCNAME:** this is the name used by SmartWeal for indexing each contact; individuals' names should appear in a "last name, first name" format, such as HEARST, WILLIAM RANDOLPH; names for corporations, businesses, institutions, etc., should appear in their normal order (e.g., HEARST ENTERPRISES)
- FCCODE:** because people can have exactly the same name, SmartWeal needs a unique way to identify each contact in the data base; this field contains a code that serves that purpose; if you already have such a code in your data, then that code could suffice; SmartWeal will, though, generate unique codes for each contact that is imported into its data base, so you do not need to specify a code for this field; if you supply your own "client codes", be sure they are no longer than 10 characters
- FCADDR1:** this field should contain the entire address field, up to but excluding the name of the city/town; for example, this field could contain something like 123 Castle Avenue; if (some programs will export this data as a multi-line field, such as:
The Rosebud Suite,
2400 Wayzgoose Towers,
123 Castle Avenue;
if that is the case, SmartWeal will temporarily change that multi-line field to a single-line field, and then turn it back to a multi-line field when the importing is complete, to deal with problems that could arise from mistaking that three-line field for three different contact records; this field can be as long as 640 characters
- FCPCODE:** this is the zip code; it can be up to sixteen characters long
- FCONTAC:** for corporate and institutional clients, this field will be the name of the "contact person" for that contact (e.g., William Hearst could be the contact person for Hearst Enterprises)
- FCPHONHOME:** this is the home phone number for the client/name; although SmartWeal prefers to see this as a strictly numeric field, you can still export it with parentheses and other special characters, and SmartWeal will strip those extra characters from the field before it is imported
- FCEXTWORK:** this is the extension of the work number for the client/name; this field can contain up to five characters
- FCPHONWORK:** this is the work phone number for the client/name; although SmartWeal prefers to see this as a strictly numeric field, you can still export it with parentheses and other special characters, and SmartWeal will strip those extra characters from the field before it is imported
- FCCITY:** this is the part of the client/contact address containing the city, state and other address information (possibly including the country where the client/contact lives)

FCNOTE1:	if your current program has a field for notes about the contact, or if there is another field that you would like to export into SmartWeal (but for which there is no corresponding field in this list), this is a field where you might want to put those notes
FCFAX:	this is the fax number for the client/name; although SmartWeal prefers to see this as a strictly numeric field, you can still export it with parentheses and other special characters; SmartWeal will strip those characters from the field before it is imported
FCSALUTATION:	this field can contain something like “Dear Bill”, for use in SmartWeal’s quick letters
FCOTHERPHONE:	this is an alternate phone number (usually a cell/mobile phone) for the client/name; although SmartWeal prefers to see this as a strictly numeric field, you can still export it with parentheses and other special characters, and SmartWeal will strip those extra characters from the field before it is exported
FCREFERLAWYER:	if your current application keeps track of the person who brought the client/contact to the firm, then the user-initials of that person should be inserted here; note that SmartWeal expects that any user-initials used here will correspond to the user-initials used normally in SmartWeal (e.g., if your exported data contains BH in this field (for Bill Hearst), but you plan to use WRH as the standard sign-in initials for using SmartWeal, then there could be problems
FCINTERNET:	email address for the contact
FCFAMNAME:	the contact’s name as it should appear on bills, letters, etc. (SmartWeal will do its best to convert names like “SMITH, BOB” to “Bob Smith” on letters and bills, but it can have a difficult time distinguishing that change, from a name like “PENN, TELLER”, and could end up addressing letters to someone named “Teller Penn”; because some applications use a familiar name (i.e., a name in First Last format) to link files to their corresponding clients, this field could be very important and might be essential in any export file you create, so you should be sure to include this field if it is available to you;
FCWEBSITE:	the URL for this contact’s primary web site
FCFIRSTNAME:	the client’s first name (Bill); SmartWeal will review any file of exported data, and do its best to infer first and last names from familiar names (and vice versa), but there is less chance of error if all those fields can be provided in the export file
FCLASTNAME:	the client’s last name (Hearst)

If you happen to see that your current application can produce an export file with some (or all!?) of the other fields mentioned in the list at the top of these notes, feel free to create a file with that extra information in it. It will be easier for us, though (and likely easier for you), if you limit the information to the sixteen fields mentioned in the above list. Those fields should provide all the essential information from your current contact data, for use in your new SmartWeal data file.

(smartcontactimport)