

CSV Import Guide

This document aims to explain the use of the CSV import function found under Utilities>>Tools>>CSV Import. This document covers version 1.0 of the CSV Import Function.

The CSV must consist of at least 5 columns.

Code,
Reference,
Barcode,
Buyprice,
SellPrice.

The first row in the table should contain the column names, as these will be used by the routine to select the correct data.


Interface:

From the Utilities Menu in your POS select Tools then CSV Import where you will be presented with the following screen:

The screenshot shows the 'Import CSV File' window in the uniCenta oPOS application. The window title is 'uniCenta oPOS - Touch Friendly Point Of Sale' and the version is 'Import Version V1.3'. The interface includes a file selection field, a separator dropdown menu, and a 'Read Header' button. Below these are dropdown menus for 'Reference', 'Barcode', 'Name', 'Buy Price', 'Sell Price', 'Category' (set to 'Category Standard'), and 'Tax' (set to 'Tax Exempt'). There are also two checkboxes: 'Include Catalogue?' and 'Sell Price includes Tax?'. A 'Status' panel on the right shows 'Records Found', 'New Products', 'Invalid Products', 'Prices Updated', 'Missing Data', 'Bad Price', and 'Not Changed'. At the bottom, there is an 'Import CSV' button. The system tray at the bottom left shows 'John-PC - General' and 'jdbc:mysql://localhost:3306/unicentaopos', and the bottom right shows the user 'Administrator'.

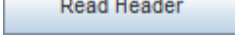
The interface consists of the following input fields:



File: You may type in the location of your .csv file if you know it or you may use the  folder button to open the file selection dialog. Once you have selected a file in the dialog it's location will be displayed in this box.

Separator: Select the separator (comma, semi-colon, tilde or carrot) you used in the creation of your CSV. The default and most common option is “,” (comma, hence CSV file is a Comma Separated Value file.) This also means that your file may not contain the selected character in the field data unless it is property escaped “\,”.

Read Header

Read Header: Once you've selected a file this button:  will become enabled. Simply click it to load the headers from the CSV file and populate them into the rest of the form fields. Headers are read from the very first row of data in the file and so there should not be any actual data in the first row. Because of this your file **must** have headers.

Reference: This dropdown will contain all the unused headers found in the CSV file. The reference is also known as the 'product number' but should not be confused with the 'UPC' or 'barcode' as these are different. The reference must be unique for every product. After each header selection the program will update the other fields to prevent selecting the same header twice.

Barcode: This dropdown will contain all the unused headers found in the CSV file. The Barcode is also known as the “UPC”. After each header selection the program will update the other fields to prevent selecting the same header twice.

Name: This dropdown will contain all the unused headers found in the CSV file. The Name is also known as the product description. The name must be unique for every product. After each header selection the program will update the other fields to prevent selecting the same header twice.

***** Note:** If you are updating prices of existing products through the CSV Import function, the Reference, Barcode and Name fields must ALL match exactly with what is already in the database or the whole record will be rejected.

Buy Price: This dropdown will contain all the unused headers found in the CSV file. Select the name of the field corresponding to the Buy Price in your CSV.

Sell Price: This dropdown will contain all the unused headers found in the CSV file. Select the name of the field corresponding to the Buy Price in your CSV.

Category: This dropdown will contain all the unused headers found in the CSV file. All imports will be set to use this category

Tax: This dropdown will contain all the tax categories you have defined. All items imported will be set to this tax category.

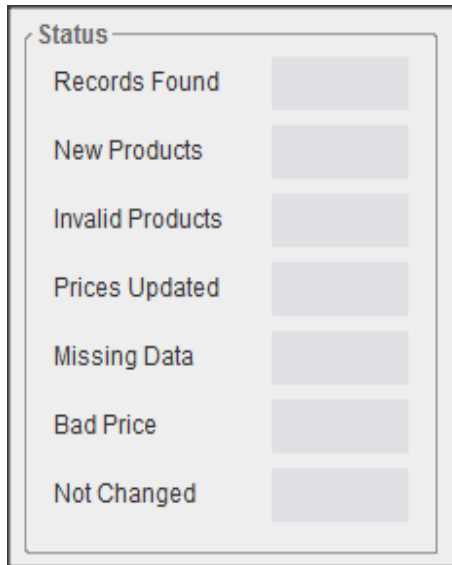
Include Catalogue?

: Check this box to have the imported items included in the catalogue

Sell Price includes Tax? : Check this box if the items you are importing will have the tax included in the buy price. The price will be adjusted programmatically for tax in this case. If the tax is in addition to the buy price do not check this box.

Output:

The CSV Import function includes functionality to tell you what was done and what has gone wrong (if anything). The status box will guide you:



Status	
Records Found	
New Products	
Invalid Products	
Prices Updated	
Missing Data	
Bad Price	
Not Changed	

Records Found: The number of records found in the file.

New Products: the number of new records created from the CSV file.

Invalid Products: Number of products that were not added/updated due to errors.

Prices Updated: Number of product prices updated successfully.

Missing Data: Number of products that were not added/updated due to missing data.

Bad Price: Number of products not added/updated due to bad price data.

Not Changed: Products whose records were identical to the

data already in the database.

Error Related Notes:

Invalid products can fail for any reason including ones covered by other messages. Check the Utilities>>Tools>>CSV Import Logs for more information.

Missing Data means that either the Reference, Barcode, Name, Sale Price or Buy Price (or more than one) were missing from the record.

Bad Price means that the buy or sell price probably had invalid characters. The only characters currently allowed are numbers [0-9], Commas [,], decimal points [.]. Any other characters will cause the entry to be rejected.