Import

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Menu: Manage POS / Import

Feature: Import

Editions: Cloud, Corporate, Store

The POS Import feature enables you to import data into POS, and guides you through the import process for a variety of data types.

a) Import Type

The first step in an import is to select the import data type. The page will list the available types of data that are supported by import.

> The supported data formats depend on the features that are enabled in POS.

b) Upload File

The second step for an import is to prepare and upload a file for the import.

The upload page describes the format and fields for the import file you must prepare.

- In most cases this file is a CSV (comma separated value) file.
- You can use a program like Excel to create CSV files.
- You can click the Download Sample link for an example CSV file.

When you have prepared the import file, you can upload it using this page.

> Using Excel to work with CSV files can be tricky, as it will often perform auto-corrections that

you don't want. A common problem is that if a text field looks like a number, it will strip any leading zeros (e.g. 01234 becomes 1234). Other tools like LibreOffice do not have this issue.

To get around this problem, prepend a single quote character (') to the number (e.g. '01234). Excel will not convert the value, and POS will correctly strip the quote character when it imports the field.

c) Import Validation

After uploading the import file, the import process validates the imported data.

The main import page shows a summary of this validation. You can review individual rows and data by clicking the Review Rows button.

If you are not satisfied with the imported data, and would like to fix the data and retry import, you can click Delete Import.

After data has been uploaded, it stays in temporary storage until it is processed, deleted or archived. You can come back to the import process at any time to continue or monitor progress.

Otherwise, if you are satisfied with the import, you can click Start Import.

d) Import Processing

After you start the import, POS will process it in the background.

You can view the status of the import, including a summary of which rows have been imported, have yet to be imported, or have failed import.

In most cases data that has passed validation will import without problems. Import failure is not common, but may be caused by things like network connection problems.

e) Import Completion

After import processing has completed, you will see a summary of the imported data. You can review the row data to see which import rows have been successfully processed, and which have failed.

After review, you can click Archive Import to remove the import data and make the import available for other types of data.

Archiving by default will remove all temporary row data. In most cases this is what you want. However, you can keep the temporary row data if you'd like Fusion Support to diagnose import problems.