.txt - Exporting and Importing

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Export

1. The Export feature is available in the program Maintain Area of the software and is conveniently located in the grid toolbar by clicking the **Export text file** button on the tool bar. To read an overview of all toolbar options, please read the **Toolbars** topic in the Help Files.

2. This operation allows the user to custom define an export of their program or machine data. It converts data into a (.csv), (.txt), or (.xls) file which can be used with other applications such as Microsoft Excel. To use the export feature, click the **Export** button in the toolbar to bring up the Table Export option screen.
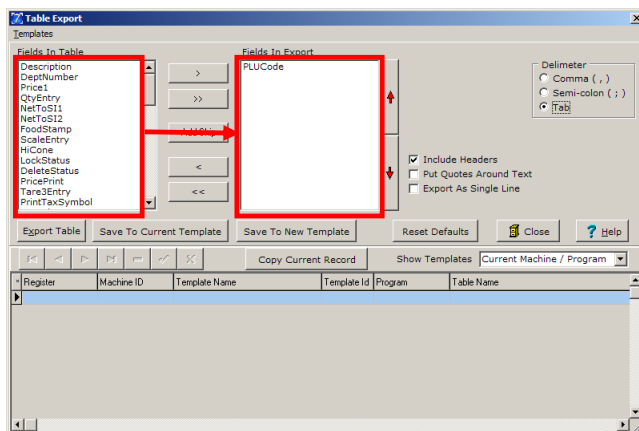
3. Within the Table Export screen, the user is able to choose which fields they wish to export. The left Fields In Table window displays all available fields for the program and the right Fields In Export window displays all fields that have been selected to be exported.
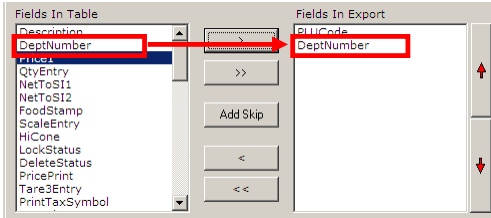
4. The user has the ability to add and remove fields from the export list by using the **Chevron** buttons (<, >, <<, and >>). The **Shift** and **Ctrl** keys on the keyboard can be utilized for multi-selecting of fields. In the graphic above, the right single chevron ⌷ button was used to add "DeptNumber" to the fields to export.

 The right single-chevron moves all fields selected in the left window to the export list.

 The right double-chevron adds all available fields for the program to the export list.

 The left single-chevron removes all selected fields in the right window from the export list.

 The left double-chevron removes all fields from the export list.

Using **Add Skip**
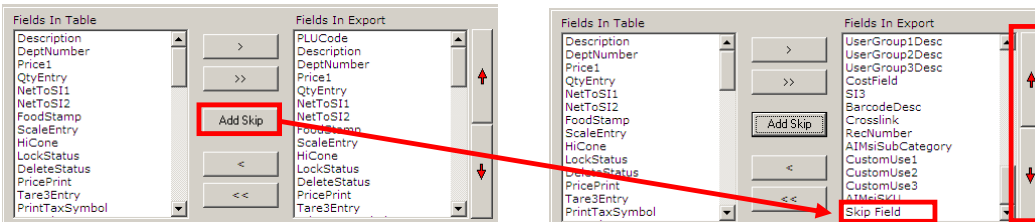
5. The **Add Skip** button in the red box allows the user to import a vendor's file that may have fields not used by the Version 7 software. A Skip Field will be added to the list of Fields To Export at the bottom of the list. It can be moved up or down with the red arrows on the right side of the screen.
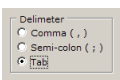
Delimiter

6. The user also has the option to choose the type of export delimiter by simply clicking on the desired type. Available delimiters include:
   A. **Comma Delimited** will separate exported data by commas (,).
   B. **Semi-Colon Delimited** will divide exported data using a semi-colon (;).
   C. **Tab Delimited** will partition exported data by inserting a tab between values.

Other Options

7. Other options include:
   A. The **Include Headers** option, if checked, will export the headers from the grid along with the program data.
   B. The **Put Quotes Around Text** option, if checked, will add quotation marks around any field that has text data.
   C. The **Export As a Single Line** option exports the file as a single line. *Note: The file cannot be re-imported to Version 7 Polling if this option is used.*

Saving Templates of Options Chosen
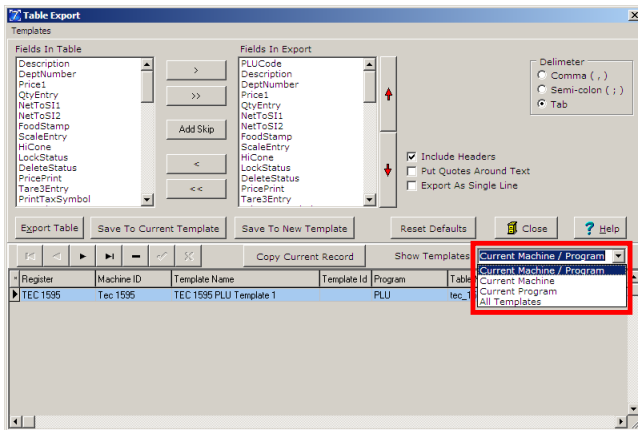
8. To save the options chosen on the Table Report screen as a new template click the **Save as New Template** button. To add or remove fields in an existing template, select the template with the **Show Templates** drop down menu so that it appears on the lower grid. Highlight the template and add or remove fields or options in the upper section of the screen then click the **Save To Current Template** button.
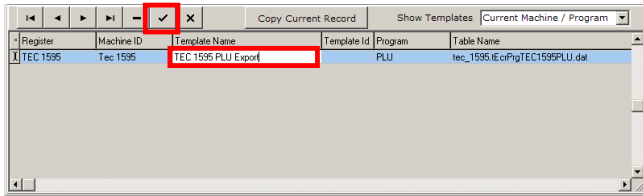
The **Reset Defaults** button returns the screen to the default for the chosen register.

The **Close** button closes the Table Export screen.

The **Help** button opens the Help File for this area of the software.

The **Copy Current Record** button copies the record highlighted in the lower grid.

Editing Information in the lower Grid

9. To edit the information in the lower grid, click on the cell and type in the changes. When finished, click on the **Post changes to record** ☑ button on the toolbar to save the changes. To see more on exporting and setting up auto importing and exporting see the Help Files topic **Setting up Auto Import/Export for Version 7**.
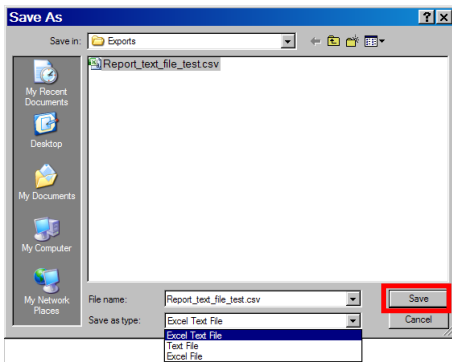

10. The **Export Table** button at the bottom of the Table Export screen will bring up a Save As prompt screen from which the user can select the location to save their export file. The user also has the option to save the export file as a (.csv), (.txt), or (.xls) file format within this screen.
11. Once the desired location is selected, the **Save** button (in the red box) will export your program data. The **Cancel** button will close the Save As prompt screen and take the user back to the export options without saving an export.


12. A progress bar will appear then the screen above opens to let the user know that the export was successful. Click **OK** to finish.
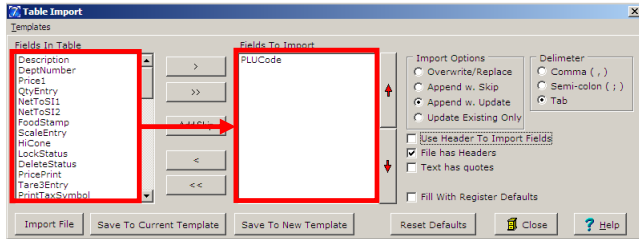
Import
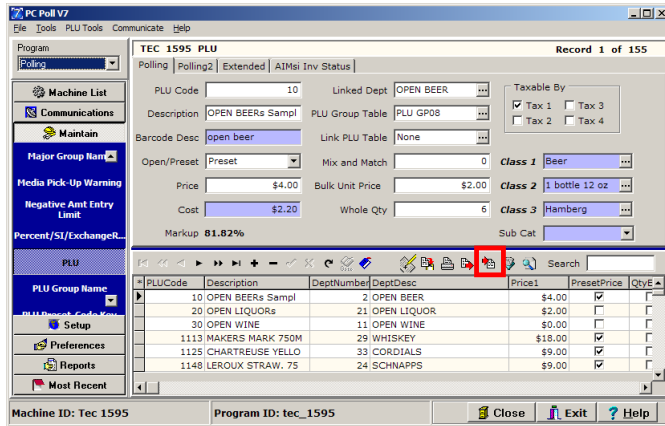
13. The Import feature is available in the program Maintain Area of the software and is located in the grid toolbar. Click the **Import From text file** ![icon] button (in the red box) to open. For an overview of all toolbar options, please read the Help Files topic **Toolbars**. The Import operation allows the user to import program data from .csv, .txt, or .xls files.
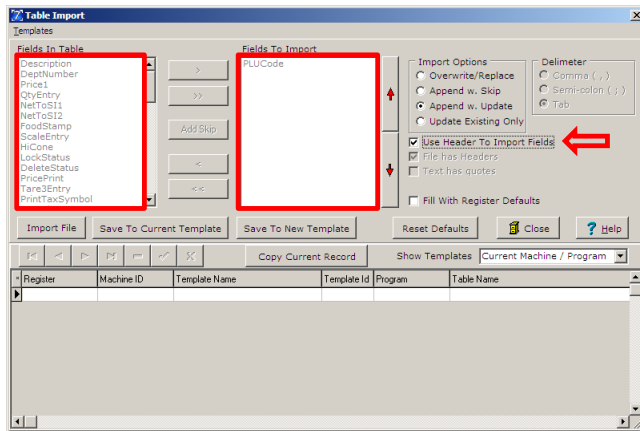

14. A Table Import screen will open but the items in the Fields In Table and Fields To Import sections will not be active until **Use Header To Import Fields** is clicked on to deselect it. (This removes the check mark.)

15. Within this screen, the user is able to choose which fields they wish to import by moving them from the Fields In Table on the left to the Fields to Import on the right. The left window displays all available fields for the program and the right window displays all fields selected to be imported.

Saving Templates of Options Chosen
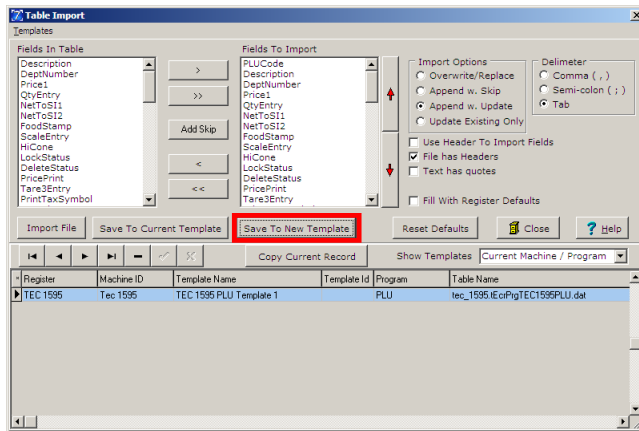
16. Templates for the options chosen can be saved by clicking the **Save To New Template** button (in red box) on the bottom of the Table Import screen. Then click on the **Show Templates** drop down menu to see the saved templates grid at the bottom of the screen.

Editing Information in the lower Grid
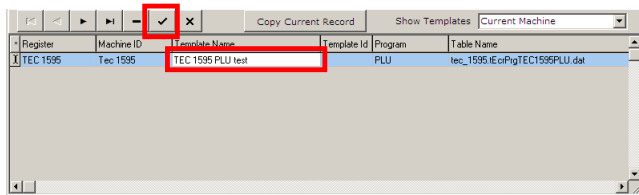
17. To edit the information in the grid, click on cell and type in the changes. When finished, click on the **Save Changes** button just above the templates grid.
18. Fields can be added and removed from the import list by using the **Chevron** buttons (<, >, <<, and >>). The **Shift** and **Ctrl** keys on the keyboard can be utilized for multi-selecting of fields.
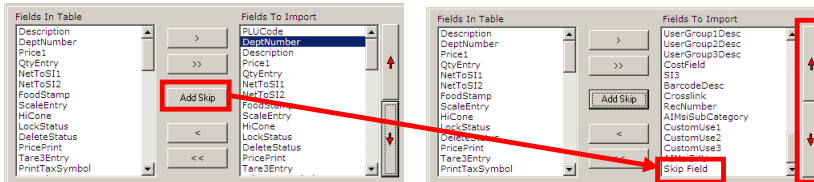
|	
>	The right single-chevron moves all fields selected in the left window to the import list.
>>	The right double-chevron adds all available fields for the program to the import list.
<	The left single-chevron removes all selected fields in the right window from the import list.
<<	The left double-chevron removes all fields from the import list.

Using Add Skip

19. The **Add Skip** button in the red box allows the user to import a vendor's file that may have fields not used by the Version 7 software. A Skip Field will be added to the list of Fields To Import at the bottom of the list. It can be moved up or down with the red arrows on the right side of the screen.
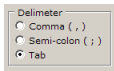
Delimiter

20. The user also has the option to choose the type of import delimiter by simply clicking on the desired type. Available delimiters include:
    A. **Comma Delimited** will separate exported data by commas (,).
    B. **Semi-Colon Delimited** will divide exported data using a semi-colon (;).
    C. **Tab Delimited** will partition exported data by inserting a tab between values.
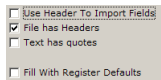
Other Import Options
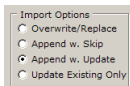
21. Other import options include:
    A. With the **Overwrite/Replace** option checked, the import will delete the current file and replace it with the imported file.
    B. The **Append w. Skip** will import the desired file and do a lookup on the current database to locate items either by number, plu code or both. If the item is located in the current file, that

item record is skipped during the import. If the record is not found, the new item is appended to the dataset.

C. The **Append w. Update** will import the desired file and do a lookup on the current database to locate items either by number, plu code or both. If the item is located in the current file, that item record is updated during the import. Therefore, if only three fields e.g. PLU Code, Description, and Price are imported into the software the program will locate that item and replace the data values for only those chosen fields. If the record is not found in the database, the new item is appended to the end of the dataset.

D. The **Update Existing Only** will import the desired file and do a lookup on the current database to locate items either by number, plu code or both. If the item is located in the current file, that item record is updated during the import. The only difference is we do not add new items we just update existing items.

## Additional Import Options

22. Additional import options include:

A. With the **Use Header To Import Fields** option, users do not need to select the fields to import in the Fields To Import area. The software reads the first line of the import file and matches the headers to fields names.

B. The **File has Headers** option must be checked if the import file contains headers. This option tells the software not to import the first line, as it does not contain data.

C. The **Text has quotes** option must be checked if all text fields were exported with quote marks around them. This option tells the software to ignore the quote marks on import of text data.

D. The **Fill With Register Defaults** option works similarly to the PLU Tools option to fill blanks. When a new item record is added the database fields that are not included in the import file are automatically filled in by the software with register defaults in order to create a file that will send correctly to the register.
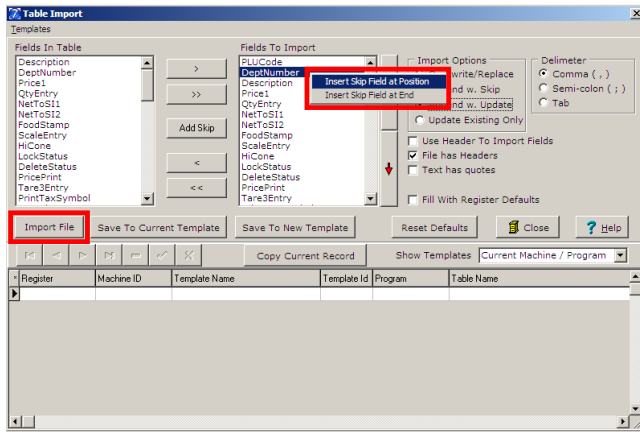
23. There are two more options for adding skips. Right clicking in the Fields To Import window opens the option to **Insert Skip Field at Position** or **Insert Skip Field at End**. The **Insert Skip Field at Position** option puts a Skip Field just above the highlighted field. The **Insert Skip Field at End** option adds the Skip Field at the bottom of the Fields to Import list.
24. Click the **Import File** button to begin the import.
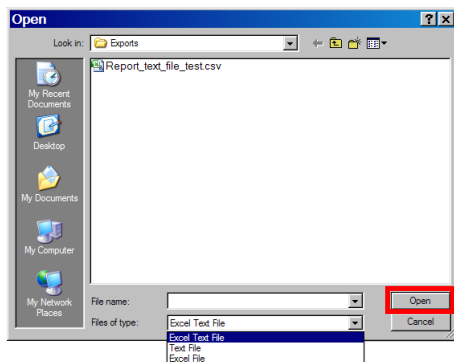
25. An Open screen will appear. Browse to the files to import. Click the **Open** button.
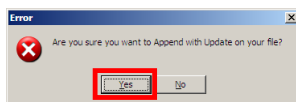

26. A screen like the one above will open. To proceed with the import click **Yes**.
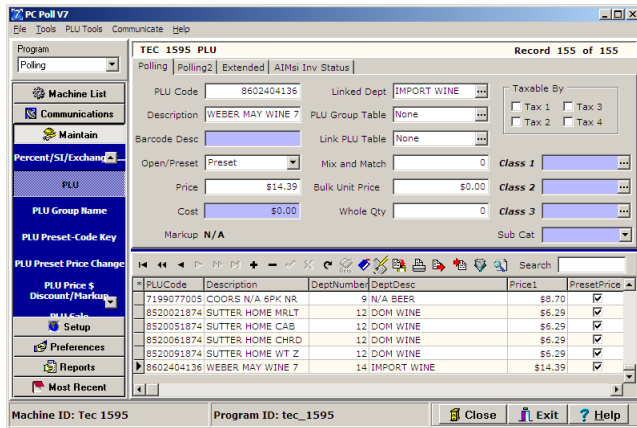
27. A progress bar will open then return to the main screen.

Sample Import Errors

Note: If the data within the import file is improperly formatted, errors may appear during the import process. If the data is largely correct, it is best to click past the errors and let the data import. Then manually re-enter the records that were invalid within the maintain area. Below are a few sample errors.
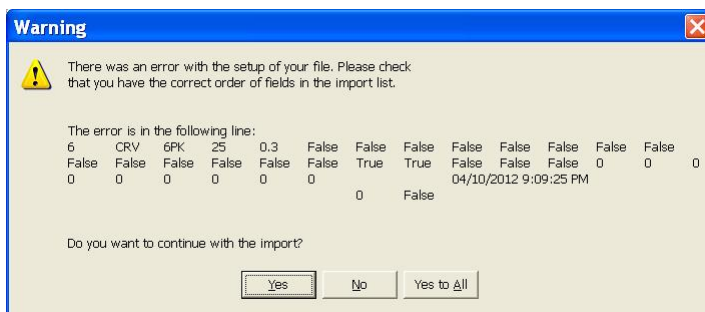
To read more on importing and setting up auto importing and exporting see the Help Files topic **Setting up Auto Import/Export for Version 7**.