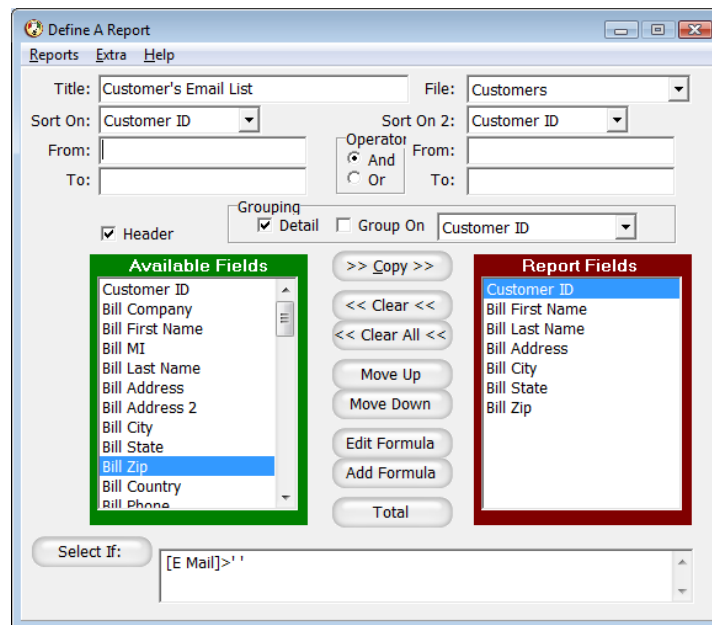


Exporting from Define a Report

Define a Report is a report generator that allows you to access the POS•IM database and generate customized reports in a specific format. One of the main functions of Define a Report is the ability to export information from POS•IM.

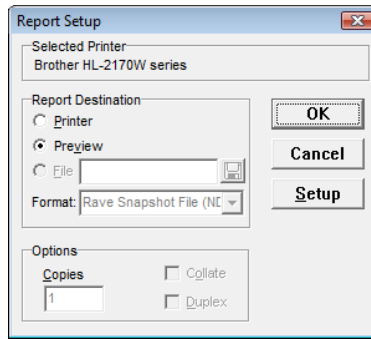
Some examples of how exporting could be used, would be to create a report of customers with an email address listed on the customer card, or you could generate a report based on a specific item purchased during a certain period of time, etc. Once you have chosen and specified the parameters of your report, you can export the information so you can open it using an Excel spreadsheet.

The following example shows the Change Item report found in the report definitions of POS•IM. I could use this report definition to export items in the database and make changes. Then after my changes are made, I would import them back into the database.

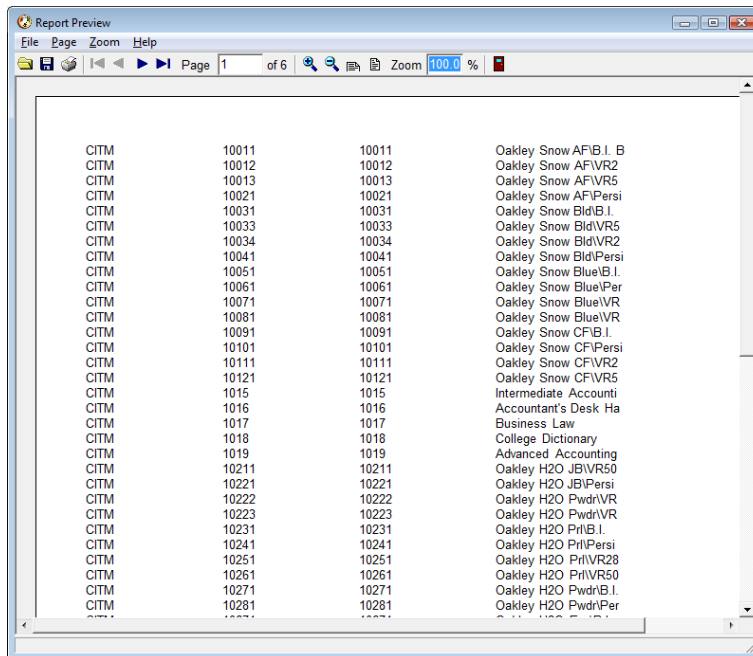


Once you have chosen the parameters of your report or loaded a report definition, you will want to preview the information to make sure that it is the correct information you want to be exported.

Go to the **Reports** menu at the top of the Define a Report window, then choose **Send to Preview/Print**, then Press **OK**

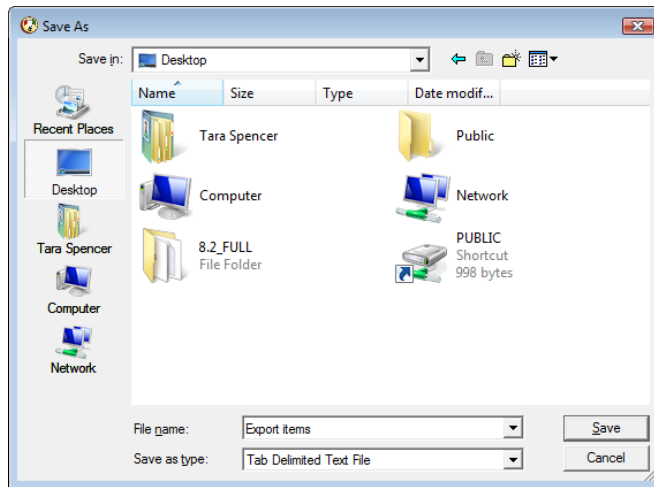


Verify that the information you see is the information you want exported. If any changes need to be made, close out of the Report Preview and make desired changes. Once changes have been made, then open Print Preview again and review the information.



Once you have verified the information shown is correct, close Report Preview and go back to the Reports menu of Define a Report. Select the **Reports** menu, then choose **Send to disk**. This will open a new window where you will choose where to send save the document and also give the document a name. Verify that the file type is showing as Tab Delimited Text File.

NOTE: All information exported or imported from POS•IM must stay in a text format. If the file is opened or saved as any other format, the information can be transposed. This is very critical when fields such as UPC, retail price, cost, etc are included in a report.

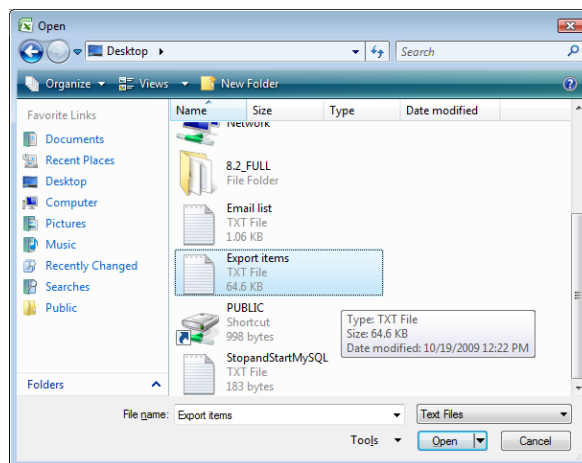


Once you have chosen a path for the information to be stored to, click **Save**.

NOTE: NEVER open the report from a shortcut, it will open using a general format and the numeric fields in the report will be transposed

Now that you have exported the information from POSIM, now you can open Microsoft Excel to view/edit the report.

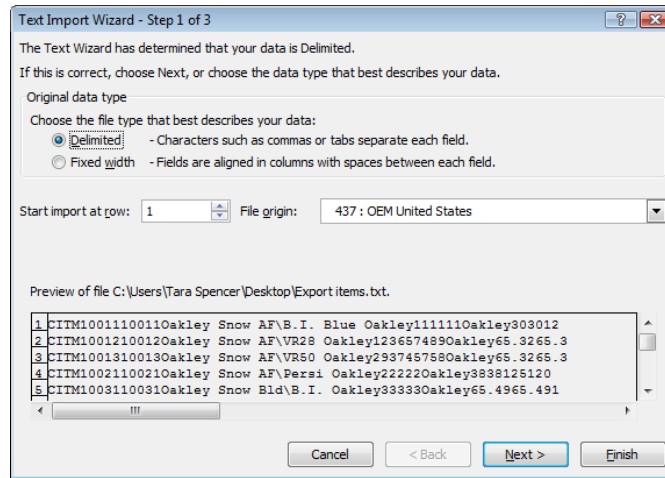
From the Microsoft Excel toolbar select **File**, then choose **Open**. A window will appear where you will browse will open and allow you to select the file you want to open. Change the file types to Text Files in order to find your document. By default it opens shows only Excel files.



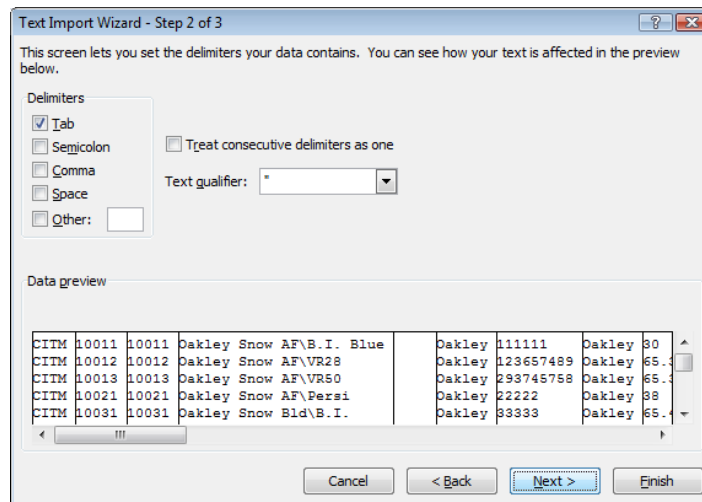
Once you have found your text document, select on the file and press **Open**.

A text wizard will appear. You must follow these steps to keep the information in a text format:

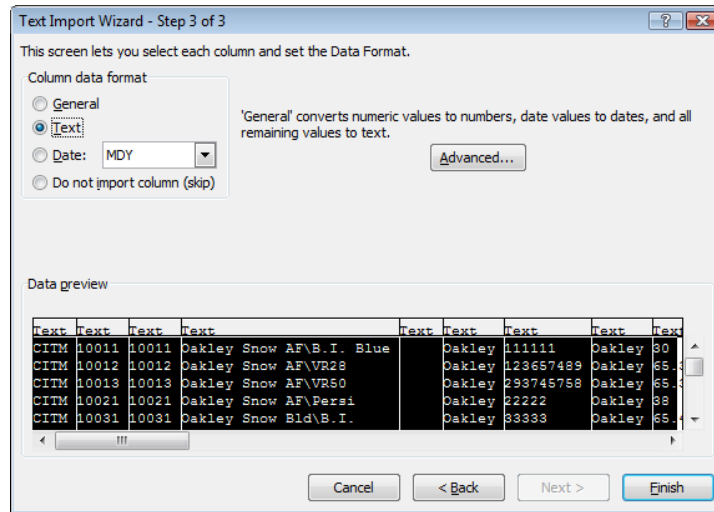
Step 1 of 3. Click **Next**



Step 2 of 3. Click **Next**



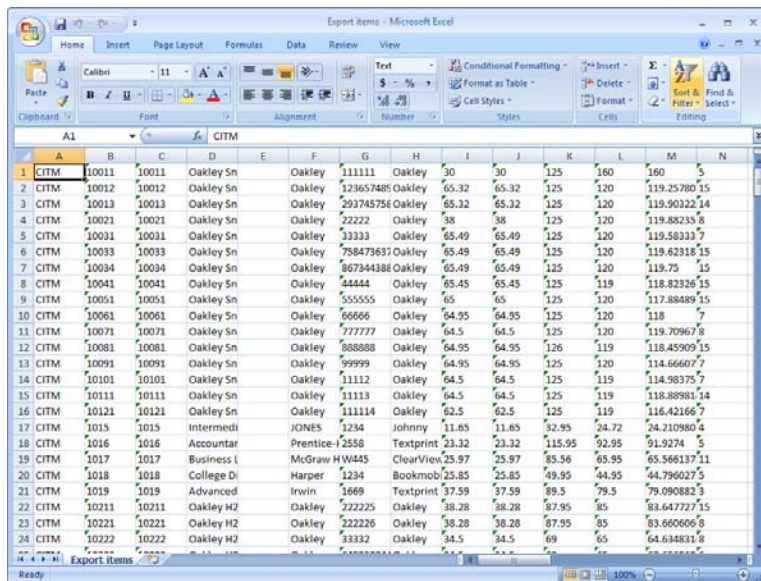
Step 3 of 3. Change the bullet point under 'Column Data Format' to **Text** and make sure that each column is marked in black. This indicates that all columns will be opened using Text Format. If only the first column is highlighted, you must hold down your Shift key on the keyboard, scroll right with your mouse, and click your mouse in the last column to make sure all columns read as Text at the top.



****Before you select Finish, make sure that the bullet point is still on Text. Sometimes when you highlight the spreadsheet columns the bullet point will disappear. ****

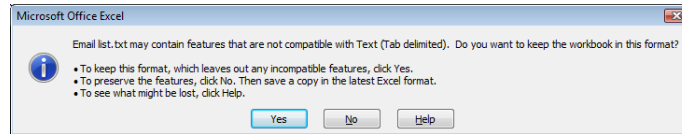
Once the bullet point is selected on Text and the whole spreadsheet is marked in black (as shown in the example above), press **Finish**.

You will now see the information opened in an Excel spreadsheet. Here you can make changes to the different fields and import the information back into POS•IM.



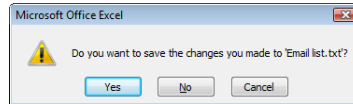
After you make changes to the spreadsheet, you must save it the following way:

Go to your Excel toolbar and choose **File**, then select **Save as**. The document name will appear. Make sure the file type is shown as Text (Tab Delimited). Then choose **Save**. You will see the following message:



Choose **Yes**

Close the spreadsheet, another message will appear:



Choose **No**, because you have already saved it as a text file. If you choose Yes, it will revert to general format and numeric information will be transposed.

The following are some guidelines if you are importing information back in to POS•IM.

- Your Excel spreadsheet must be closed to import it into POS•IM.
- It is critical that you open and close spreadsheets properly to retain the text format.
- When you are ready to import your files:
 1. Take a backup of your database.
 2. Open Inventory Client.
 3. Go to the **Misc menu > Import file**.
 4. Save an import errors file. This will make a record of any information that does not import and will give a description and error code indicating why that information did not import.
 5. When importing is finished you can go into your records and see the changes.