

Exporting Product Catalog from ClickPOS to SugarCRM

Usage

You can export product catalog from ClickPOS to SugarCRM. You may then use the catalog to create quotes. You are required to import the entire catalog on a regular basis to keep the SugarCRM records up to date. The ClickPOS export is populated from entries in the product catalog, that is, Stock | Product Catalog.

Prerequisites

SugarCRM Date Field : You are required to change the Date format to DD/MM/YYYY and Slashes between the dates (Not dashes or period). Eg. Select 23/12/2010 To change the date setting, Login to SugarCRM, Click on **your name** (to change your profile), then **Advanced**, then under Locale settings change the **date format**.

How to export from ClickPOS

Login to ClickPOS then produce report

Reports | Maintenance Reports | CRM Product Export 5-14

Once you see the report page, you can export the list in two ways. Export as Excel OR CSV (we recommend export as Excel)

	1. Sele	ect report 5-	14			
Maintenance R Maintenance Report CRM Product Expand All Records	C Time sheet Repo t	Use Excel or then Save as	CSV to Expo to your loca	ort, al PC		
	ClickPO5 Online - Windows Internet Explo http://203.221.101.87/login/reports/PSMaintan	rer NanceReportView.aspx?ch	ecked=true&rptName= Find Next	5-14&rptDesc=CRM Product Ex	xpor (5-14)&carrier=No Carrie	er&supplier=All Si
	Product Name	list price	unit price	tax class ^{Export Fo}	rmats ate d	cost
	CREST - XPC171B5 5M 75 OHM FLY LEAD M/M	18.136363636	18.136363636	10.000000	4/02/2010	5.4727
	CREST - CABLE XVDC12 S- VIDEO TO S-VIDEO	18.136363636	18.136363636	10.0000000	4/02/2010	7.0272
	CREST - MAINTAIN ULC10 UNIVERSAL LENS CLEANER	18.950000000	18.950000000	0.0000000	4/02/2010	8.4700
	CREST - S-VIDEO TO S-VIDEO XVDC123 3M	22.681818182	22.681818182	10.000000	4/02/2010	8.9818

OPTION 1

Excel : If you export as Excel, Once excel opens, you need to "save as" the file as a "Tab Delimited", Then the file is ready for import.

OPTION 2

CSV: If you export as a CSV, system automatically creates underlines for any space between the header values. Eg. "Product Name" displays as "Product_Name". You simply need to replace the "_" underline with a Space before you import.



Importing the file to SugarCRM.

To import the product catalog,

- 1. login to SugarCRM.
- 2. click Admin
- 3. Product Catalog, keep mouse over Product catalog button, then select Import Products

			vvelcom	e, vincen	it cheng Log Out Employ
Activities	Reports	Product Catalog			
		Actions			Last Viewed
Clear Ac	dvanced Search	Create Product fo	or Catalog talog		none
		Manufacturers			
Type ≑	Catego	Product Categori	es		
		Product Types			
		Import Products			

To import OPTION 1 as TAB delimited, Select "Tab Delimited file" and "Create and Update Records". Then Next

- To import OPTION 2 as CSV delimited, Select the "Comma Delimited file" option

	Product Catalog » Import » Step 1: Select Data Source and Import Action
	What is the Data Source? *
*	O Comma delimited file (1)
~	Tab delimited file (1)
	Eields Qualified By: Double Quote (") 💌 (1)
	O Custom delimited file (1)
	O Salesforce.com
	Import Action *
	O Create Records
$\left(\right)$	 Create and Update Records
	Next >

Then select the file your exported from ClickPOS eg, "ExportToCRM.txt", then click Next.



You will see the import field details, You should see most fields match.

The idea is to have SugarCRM "Database Fields" match against "Header Row"

The "Quantity in Stock" is taken from the actual stock count at the time of producing the 5-14 report.

Product ID Product Name Product Name* Product Name List Price* list price Unit Price* unit price Tax Class tax class Tax Class tax class Date Created Date Created Cost * cost price Date Modified date modified Vendor Part Number vendor part number Description Description Type Type Type Type Type Actegory name Category Name Category name - Do not map this field - Parent Category Manufacturer Manufacturer - Do not map this field - Reps Commission Quantity in Stock Quantity in Stock Add Field Stow Advanced Options Save Mapping As Notes: Required Field(s): Product Name, Cost, Unit Price, List Price	Database Field (1)	Header Row (1)	Default Value
Product Name * Product Name List Price * list price Unit Price * unit price Tax Class * tax class Tax Class * tax class Date Created Cost * cost price Date Modified * date modified Vendor Part Number * vendor part number Description * Description Type * Type Type * Type Category Name * Category name - Do not map this field - * Parent Category Manufacturer Manufacturer - Do not map this field - * Reps Commission Quantity in Stock * Quantity in Stock Mt Part Number * Mt Part Number	Product ID	Product ID	
List Price * Iist price Unit Price * unit price Tax Class tax class Tax Class tax class Date Created Date Created Cost * cost price Date Modified date modified Vendor Part Number vendor part number Description vendor part number Description Vendor part number Image: State Stat	Product Name *	Product Name	
Unit Price unit price Tax Class tax class Tax Class tax class Date Created Date Created Cost * cost price Date Modified date modified Vendor Part Number vendor part number Description Description Type Type Type Type Type Type Ade Field Exercise Do not map this field - Parent Category Manufacturer Manufacturer - Do not map this field - Reps Commission Quantity in Stock Quantity in Stock Mt Part Number Mt Part Number Add Field Show Advanced Options Save Mapping As Notes: Required Field(s): Product Name, Cost, Unit Price, List Price	List Price *	list price	
Tax Class tax class Taxable Date Created Date Created Cost * cost price Date Modified date modified Vendor Part Number vendor part number Description Description Description Description Type Type Type Type Parent Category Manufacturer Manufacturer - Do not map this field - Peleted - Do not map this field - Peleted - Do not map this field - Reps Commission Quantity in Stock Quantity in Stock Mft Part Number Mft Part Number Add Field Show Advanced Options Save Mapping As	Unit Price *	unit price	
Date Created Image: Cost price Cost * cost price Date Modified date modified Date Modified date modified Vendor Part Number vendor part number Description Image: Cost price Description Image: Cost price Type Type Type Type Category Name Category name Category Name Category name - Do not map this field - Image: Cost price Parent Category Manufacturer Manufacturer - Do not map this field - Image: Cost price Deleted - Do not map this field - Image: Cost price Save Mapping As Notes: Required Field(s): Product Name, Cost, Unit Price, List Price	Tax Class	tax class	Taxable 💌
Cost * cost price Date Modified date modified Vendor Part Number vendor part number Description Pescription Description Description Type Type Type Type Category Name Category name Category Name Category name - Do not map this field - Parent Category Manufacturer Manufacturer - Do not map this field - Deleted - Do not map this field - Reps Commission Quantity in Stock Quantity in Stock Mft Part Number Mft Part Number Add Field Show Advanced Options Save Mapping As Notes: Required Field(s): Product Name, Cost, Unit Price, List Price	Date Created	Date Created	
Date Modified date modified Vendor Part Number vendor part number Description Description Image: Description Image: Description Image: Description Imag	Cost *	cost price	
Vendor Part Number vendor part number Description Description Type Type Type Type Category Name Category name Category Name Category name - Do not map this field - Y Parent Category Manufacturer Manufacturer - Do not map this field - Y Deleted - Do not map this field - Y Reps Commission Quantity in Stock Quantity in Stock Mft Part Number Mft Part Number Add Field Show Advanced Options Save Mapping As	Date Modified	date modified	
Description Description Type Type Type Type Category Name Category name Category Name Category name Do not map this field - Parent Category Manufacturer Manufacturer - Do not map this field - Deleted - Do not map this field - Reps Commission Quantity in Stock Quantity in Stock Mft Part Number Mft Part Number Add Field Show Advanced Options Save Mapping As Notes: Required Field(s): Product Name, Cost, Unit Price, List Price	Vendor Part Number	vendor part number	
Type Type Type Image: Second se	Description	Description	
Category Name Category name - Do not map this field - Parent Category Manufacturer Manufacturer - Do not map this field - Deleted - Do not map this field - Deleted - Do not map this field - Reps Commission Quantity in Stock Quantity in Stock Mft Part Number Mft Part Number Add Field Show Advanced Options Save Mapping As	Туре	Туре стуре	k ×
- Do not map this field I Parent Category Manufacturer Manufacturer - Do not map this field I Deleted - Do not map this field I Reps Commission Quantity in Stock Quantity in Stock Mft Part Number Mft Part Number Add Field Show Advanced Options Save Mapping As	Category Name	Category name	► ×
Manufacturer Manufacturer Do not map this field Deleted Do not map this field Reps Commission Quantity in Stock Quantity in Stock Quantity in Stock Quantity in Stock Mft Part Number Mft Part Number Add Field Show Advanced Options Save Mapping As	Do not map this field 💌	Parent Category	
Do not map this field Deleted Do not map this field Reps Commission Quantity in Stock Quantity in Stock Quantity in Stock Quantity in Stock Mft Part Number Mft Part Number Add Field Show Advanced Options Save Mapping As	Manufacturer	Manufacturer	
Do not map this field Reps Commission Quantity in Stock Quantity in Stock Mft Part Number Mft Part Number Add Field Show Advanced Options Save Mapping As	Do not map this field 💌	Deleted	
Quantity in Stock Quantity in Stock Mft Part Number Mft Part Number Add Field Show Advanced Options Save Mapping As	Do not map this field 💌	Reps Commission	
Mft Part Number Mft Part Number Add Field Show Advanced Options Save Mapping As Notes: Required Field(s): Product Name, Cost, Unit Price, List Price	Quantity in Stock	Quantity in Stock	
Add Field Show Advanced Options Save Mapping As Notes: Required Field(s): Product Name, Cost, Unit Price, List Price	Mft Part Number	Mft Part Number	
Notes: Required Field(s): Product Name, Cost, Unit Price, List Price	Add Field Show Ad	vanced Options	Save Mapping As
< Dack import Now			

Simply click "Import Now"



The import should come back successful, You have the option to "Undo the last import" and start again.

Please note that the product "Type" and "Category Name" will be created as reference files, however the "Manufacturer" is NOT created. This needs to be added manually prior to importing making sure that the names match exactly to what's in ClickPOS as the Product SUPPLIER.