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**.
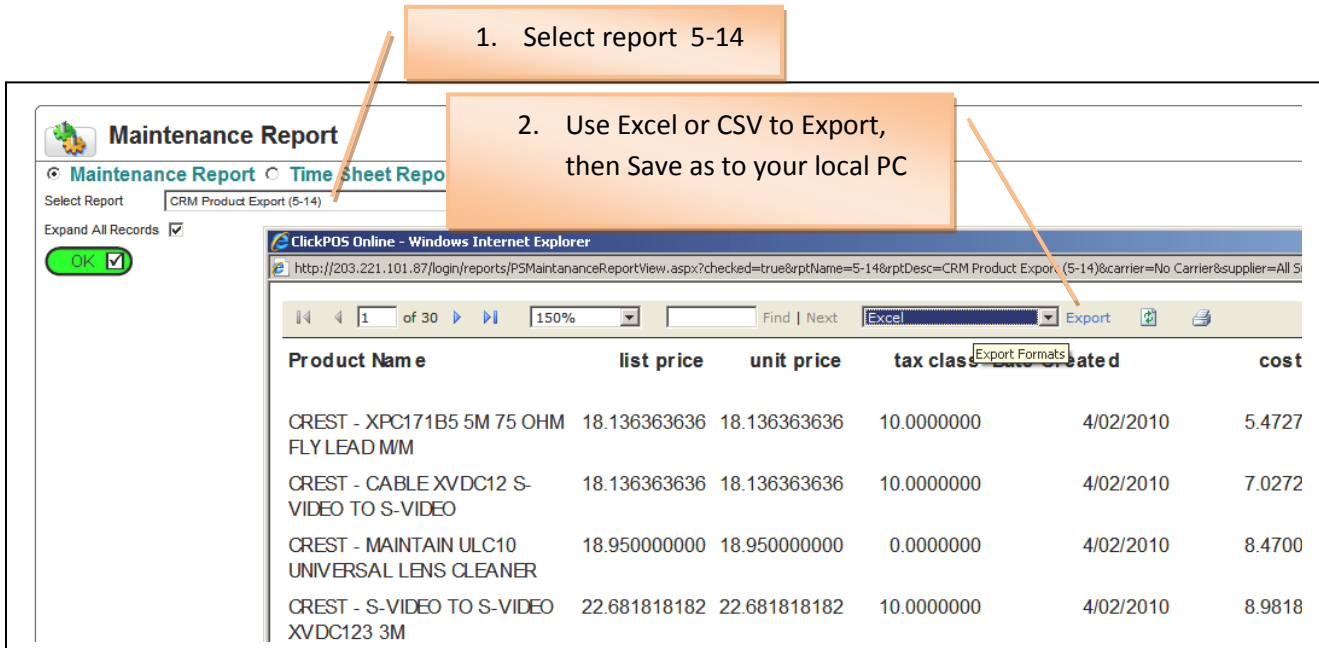
How to export from ClickPOS

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)

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.
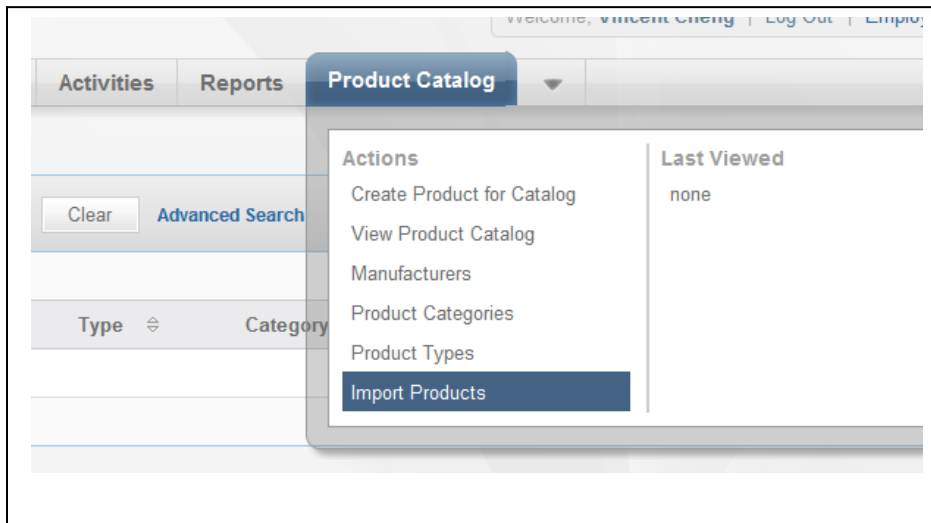
OPTION 2

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.
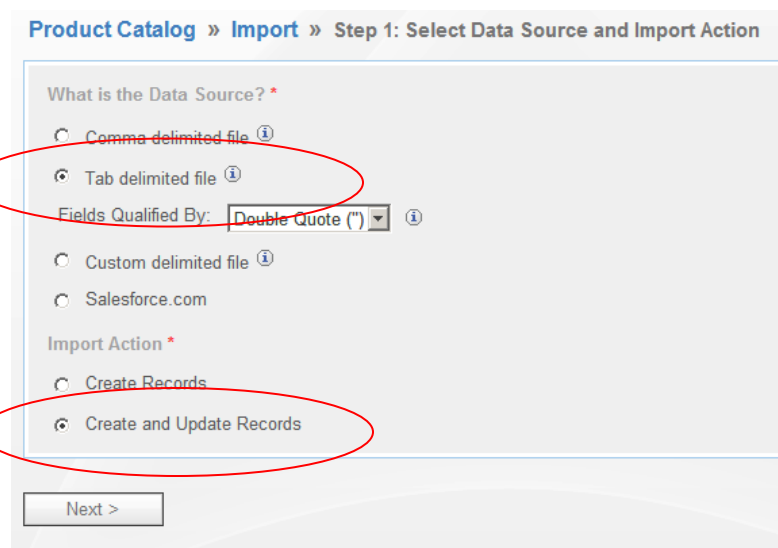
Importing the file to SugarCRM.

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**

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

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.

Database Field ⓘ	Header Row ⓘ	Default Value ⓘ
Product ID	Product ID	
Product Name *	Product Name	
List Price *	list price	
Unit Price *	unit 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	
Type	Type	
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

| < Back | 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.