

Importing products with the Product Import Wizard

Bulk imports in PowerEPOS

ESTIMATED TIME 15 minutes

A long product list does not have to be typed in one PLU at a time. The Product Import Wizard in the PowerEPOS Management Console takes a CSV file and creates the lot in one pass. The same wizard also imports PLU prices, including sales modifiers and price schemes, and POS users.

Using the Product Import Wizard

<https://www.youtube.com/watch?v=EwQO0ARpmF8>

Before you start

- Access to the PowerEPOS Management Console.
- Your product list in a spreadsheet, saved as a .csv file.
- Permission to publish changes out to your POS terminals.

1 Prepare your CSV file

Build the file in Excel or another spreadsheet program and save it as a **.csv**. You can start from scratch, or download our sample CSV and fill it in.

	A	B	C	D	E	F	G	H	I	J	K	L
	PLU	Product Class	Printing Group	Reporting Group	Display Group	Long Description	Short Description	Order Text	Order Note	Price 1	Price 2	Price 3
1	1000	7	ENTREES	ENTREES	ENTREES	ENTREES	ENTREES	ENTREES				
2	1001	1	ENTREES	ENTREES	ENTREES	Garlic Bread	Garlic Bread	Garlic Bread		4.9	5.39	4.9
3	1002	1	ENTREES	ENTREES	ENTREES	Bruschetta Traditional	Bruschetta Traditional	Bruschetta Traditional		9.9	10.89	9.9
4	1003	1	ENTREES	ENTREES	ENTREES	Bruschetta Salmon	Bruschetta Salmon	Bruschetta Salmon		11.9	13.09	11.9
5	1004	1	ENTREES	ENTREES	ENTREES	Bruschetta Gourmet	Bruschetta Gourmet	Bruschetta Gourmet		11.9	13.09	11.9
6	1005	1	ENTREES	ENTREES	ENTREES	Garlic Pizza	Garlic Pizza	Garlic Pizza		10.9	11.99	10.9
7	1006	1	ENTREES	ENTREES	ENTREES	Bruschetta Pizza	Bruschetta Pizza	Bruschetta Pizza		12.9	14.19	12.9
8	1007	1	ENTREES	ENTREES	ENTREES	Quattro Pizza	Quattro Pizza	Quattro Pizza		12.9	14.19	12.9
9	1008	1	ENTREES	ENTREES	ENTREES	Pumpkin Pizza	Pumpkin Pizza	Pumpkin Pizza		14.9	16.39	14.9
10	1009	1	ENTREES	ENTREES	ENTREES	Arancini Rossa	Arancini Rossa	Arancini Rossa		14.9	16.39	14.9
11	1010	1	ENTREES	ENTREES	ENTREES	Arancini Bianca	Arancini Bianca	Arancini Bianca		15.9	17.49	15.9
12	1011	1	ENTREES	ENTREES	ENTREES	Antipasto Plate	Antipasto Plate	Antipasto Plate		18.9	20.79	18.9
13	1012	1	ENTREES	ENTREES	ENTREES	Chilli Prawns	Chilli Prawns	Chilli Prawns		15.9	17.49	15.9
14	1013	1	ENTREES	ENTREES	ENTREES	Garlic Prawns	Garlic Prawns	Garlic Prawns		15.9	17.49	15.9
15	1014	1	ENTREES	ENTREES	ENTREES	Lamb Prawns	Lamb Prawns	Lamb Prawns		16.9	18.59	16.9
16	1015	1	ENTREES	ENTREES	ENTREES	Seafood Plate	Seafood Plate	Seafood Plate		16.9	18.59	16.9
17	1016	1	ENTREES	ENTREES	ENTREES	Seafood Plate	Seafood Plate	Seafood Plate		16.9	18.59	16.9
18	2000	7	SALADS	SALADS	SALADS	SALADS	SALADS	SALADS				
19	2001	1	SALADS	SALADS	SALADS	Italian Salad	Italian Salad	Italian Salad		12.9	14.19	12.9
20	2002	1	SALADS	SALADS	SALADS	Chicken Caesar	Chicken Caesar	Chicken Caesar		14.9	16.39	14.9
21	2003	1	SALADS	SALADS	SALADS	Mediterranean Salad	Mediterranean Salad	Mediterranean Salad		14.9	16.39	14.9
22	2004	1	SALADS	SALADS	SALADS	Prawn Avo Salad	Prawn Avo Salad	Prawn Avo Salad		16.9	18.59	16.9
23	2005	1	SALADS	SALADS	SALADS	Chick Pesto Salad	Chick Pesto Salad	Chick Pesto Salad		14.9	16.39	14.9
24	2006	1	SALADS	SALADS	SALADS	Salmon Salad	Salmon Salad	Salmon Salad		16.9	18.59	16.9

2 Open the Import Wizard

In the PowerEPOS Management Console, select the **Import Wizard** tile.



3 Choose what you are importing

The Product Import Wizard opens on three choices: **Import PLUs**, **Import PLU prices** and **Import POS users**. Each tab carries its own notes — the Import PLU tab lists the fields it accepts, and the WaiterPOS export formats PowerEPOS can read.

This guide imports PLUs, so select **Import PLUs** and then **Next** in the Control Panel.

Import Wizard

Step 1: Select the type of data you want to import

Import PLUs

Import PLU Prices

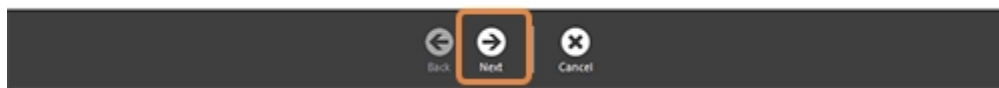
Import POS Users

PLU Import:

Imports PLUs from a source file, allowing many import fields including:

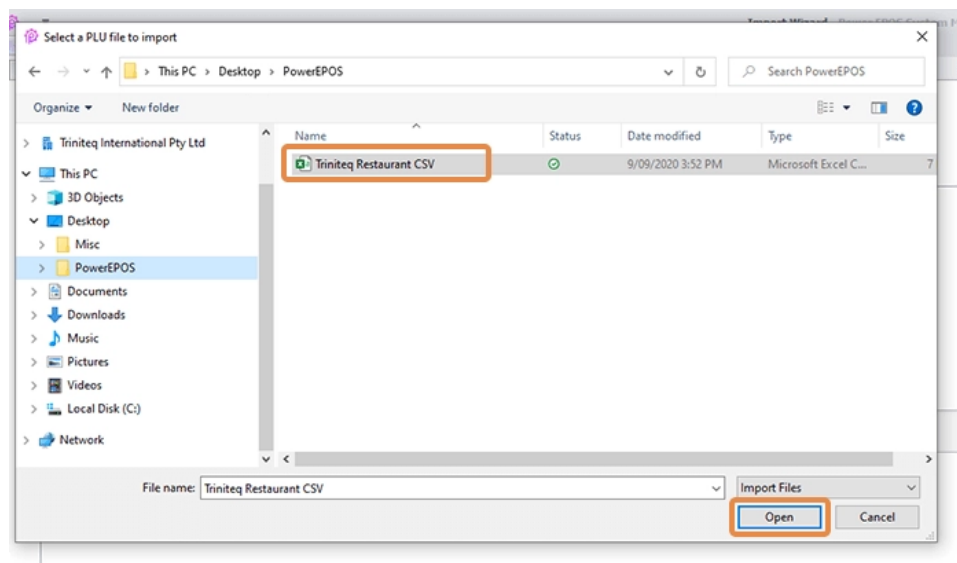
- PLU Number
- Product Class
- Text Description for long, short, KP, receipt and touchscreen
- Product Notes
- Reporting, printing and display groups
- Standard PLU Prices
- PLU Barcodes

NOTE: WaiterPOS v8 CSV export formats are also recognised



4 Pick the file

Find your .csv file on your PC and open it.



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Match the fields

Now match the columns in your file to the fields in PowerEPOS. PowerEPOS matches them for you where it can, so most of the time you can read down the list and select **Proceed**.

To set one yourself, use the drop-down on the right of the source column and pick the field it belongs to.

Select and match your import fields

Setting	Source Column	Default Value (new records only)
ID (Internal)		
PLU*	PLU	
Long Description	Long Description	
Product Class	Product Class	
Reporting Group ID (Internal)		
Reporting Group	Reporting Group	
Printing Group ID (Internal)		
Printing Group	Printing Group	
Price 1	Price 1	
Price 2	Price 2	
Price 3	Price 3	
Price 4		

Import Source Snippet: (* compulsory)

PLU	Product Class	Printing Group	Reporting Group	Display Group	Long Description	Short Description	Order Text
1000	7	ENTREES	ENTREES	ENTREES	ENTREES	ENTREES	ENTREES
1001	1	ENTREES	ENTREES	ENTREES	Garlic Bread	Garlic Bread	Garlic Bread
1002	1	ENTREES	ENTREES	ENTREES	Bruschetta Traditional	Bruschetta Traditional	Bruschetta Traditional
1003	1	ENTREES	ENTREES	ENTREES	Bruschetta Salmon	Bruschetta Salmon	Bruschetta Salmon
1004	1	ENTREES	ENTREES	ENTREES	Bruschetta Salmon	Bruschetta Salmon	Bruschetta Salmon

Advanced Proceed Cancel

Select and match your import fields

Setting	Source Column	Default Value (new records only)
ID (Internal)		
PLU*	PLU	
Long Description	Column	
Product Class		
Reporting Group ID (Internal)		
Reporting Group	Display Group	
Printing Group ID (Internal)	Long Description	
Printing Group	Order Note	
Price 1	Order Text	
Price 2	PLU	
Price 3	Price 1	
Price 4	x	

Import Source Snippet: (* compulsory)

PLU	Product Class	Printing Group	Reporting Group	Display Group	Long Description	Short Description	Order Text
200000	7	KIDS DESSERTS	KIDS DESSERTS	KIDS DESSERTS	KIDS DESSERTS	KIDS DESSERTS	KIDS DESSERTS
200001	1	KIDS DESSERTS	KIDS DESSERTS	KIDS DESSERTS	Icecream	I/C	I/C
200002	1	KIDS DESSERTS	KIDS DESSERTS	KIDS DESSERTS	Chocolate Cake	Choc cake	Choc cake
200003	1	KIDS DESSERTS	KIDS DESSERTS	KIDS DESSERTS	Vanilla Slice	Van Sic	Van Sic

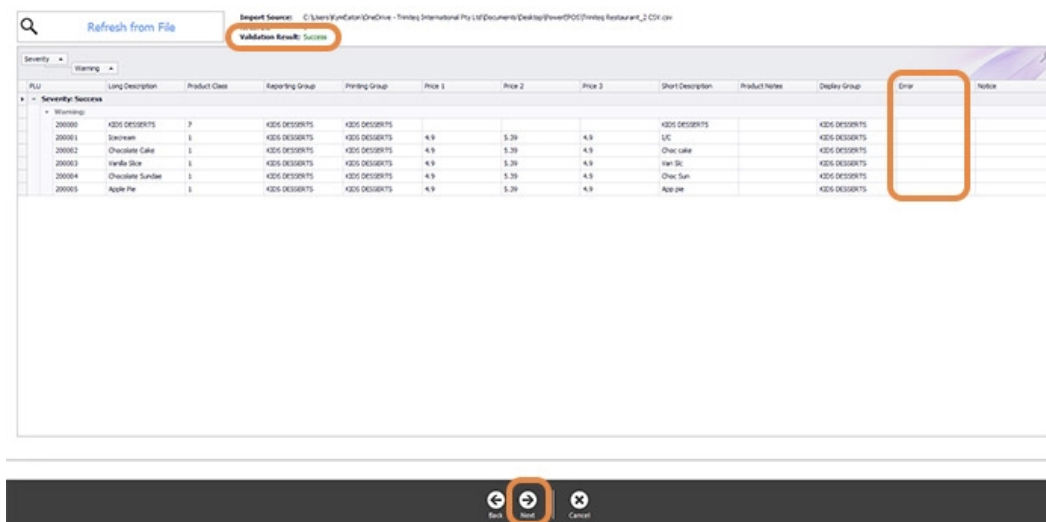
Advanced Proceed Cancel

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Check for mapping errors

This screen reports what it made of the file. Check the **Validation Result**, and check that nothing is listed under **Errors** — an empty Errors column means every PLU is mapped correctly. Select **Next**.

If something is listed there, select **Back** and fix the matching on the previous screen.



Report Source: C:\Users\Kumfator\OneDrive - Triniteq International Pty Ltd\Documents\Desktop\PowerEPOS\Triniteq Restaurant_2 CSV.csv

Validation Result: Success

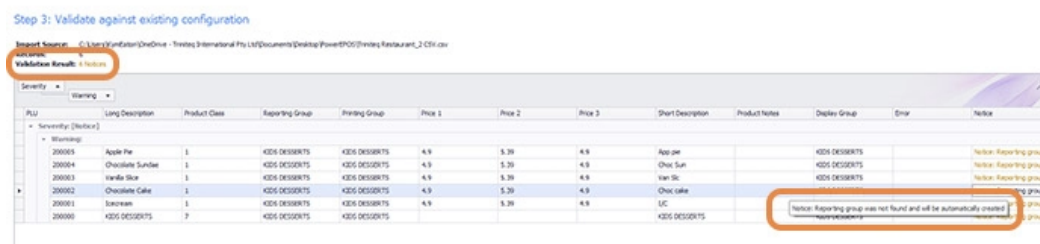
PLU	Long Description	Product Class	Reporting Group	Printing Group	Price 1	Price 2	Price 3	Short Description	Product Notes	Display Group	Error	Notice
200000	KIDS DESSERTS	7	KIDS DESSERTS	KIDS DESSERTS				KIDS DESSERTS		KIDS DESSERTS		
200001	Icecream	5	KIDS DESSERTS	KIDS DESSERTS	4.9	5.39	4.9	ICE		KIDS DESSERTS		
200002	Chocolate Cake	5	KIDS DESSERTS	KIDS DESSERTS	4.9	5.39	4.9	Choc cake		KIDS DESSERTS		
200003	Vanilla Slice	5	KIDS DESSERTS	KIDS DESSERTS	4.9	5.39	4.9	Van Slc		KIDS DESSERTS		
200004	Chocolate Sundae	5	KIDS DESSERTS	KIDS DESSERTS	4.9	5.39	4.9	Choc Sun		KIDS DESSERTS		
200005	Apple Pie	5	KIDS DESSERTS	KIDS DESSERTS	4.9	5.39	4.9	App pie		KIDS DESSERTS		

Back Next Cancel

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Check the data against your configuration

The wizard then checks the file against your current PowerEPOS setup. Notices are not errors: in this example there are six, and hovering over them explains that the reporting group *Kids Desserts* does not exist yet and will be created by the import. Read them, then select **Next**.



Step 3: Validate against existing configuration

Report Source: C:\Users\Kumfator\OneDrive - Triniteq International Pty Ltd\Documents\Desktop\PowerEPOS\Triniteq Restaurant_2 CSV.csv

Validation Result: 6 Notices

PLU	Long Description	Product Class	Reporting Group	Printing Group	Price 1	Price 2	Price 3	Short Description	Product Notes	Display Group	Error	Notice
200005	Apple Pie	5	KIDS DESSERTS	KIDS DESSERTS	4.9	5.39	4.9	App pie		KIDS DESSERTS		Notice: Reporting group
200004	Chocolate Sundae	5	KIDS DESSERTS	KIDS DESSERTS	4.9	5.39	4.9	Choc Sun		KIDS DESSERTS		Notice: Reporting group
200003	Vanilla Slice	5	KIDS DESSERTS	KIDS DESSERTS	4.9	5.39	4.9	Van Slc		KIDS DESSERTS		Notice: Reporting group
200002	Chocolate Cake	5	KIDS DESSERTS	KIDS DESSERTS	4.9	5.39	4.9	Choc cake		KIDS DESSERTS		Notice: Reporting group
200001	Icecream	5	KIDS DESSERTS	KIDS DESSERTS	4.9	5.39	4.9	ICE		KIDS DESSERTS		Notice: Reporting group
200000	KIDS DESSERTS	7	KIDS DESSERTS	KIDS DESSERTS				KIDS DESSERTS		KIDS DESSERTS		Notice: Reporting group was not found and will be automatically created

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Finish the import

When the import has run you are shown the **Import Result**. Select **Finish** to return to the Management Console.

Import Wizard

Step 4: Import all records

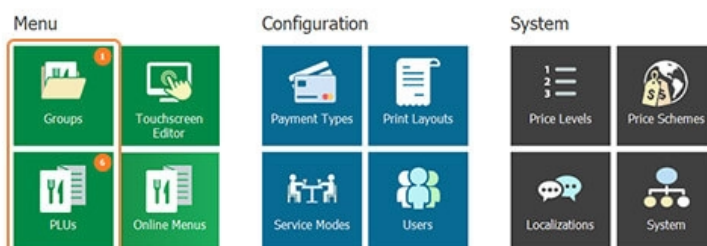
Import Result: **Success**

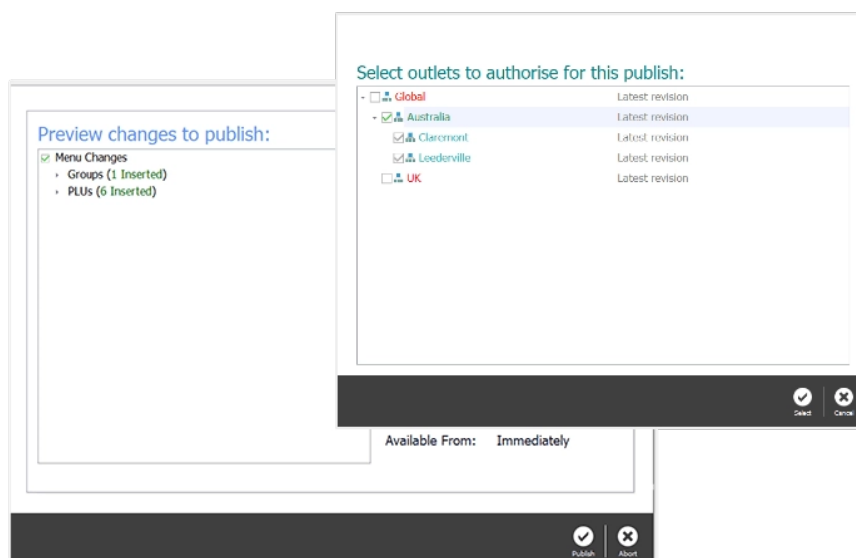
9

Publish the new PLUs to the POS

The imported PLUs are in the Management Console, but not yet on your terminals. In this example the console shows six new PLUs to publish and one new group created by the import.

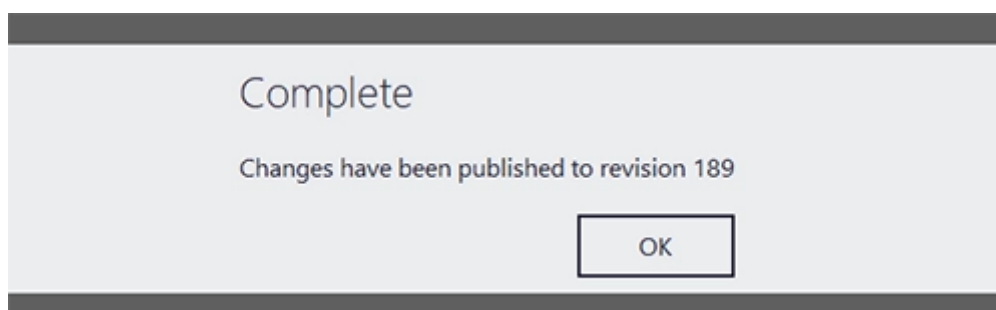
Select **Publish** at the top right of the Management Console, choose the items you want to publish and the outlets to publish them to, and confirm.





10 Note the revision number

Once the changes are published you are shown a **Complete** message with a revision number. Keep it: the Revision Management Tool can wind the changes back by that number if you need to.



11 Need a hand? Contact Triniteq Support

NEED A HAND? CONTACT TRINITEQ SUPPORT

Phone **1300 784 276**

Email **support@triniteq.com**

Our support team is here to help.