

ASCII Transfer using Microsoft Excel



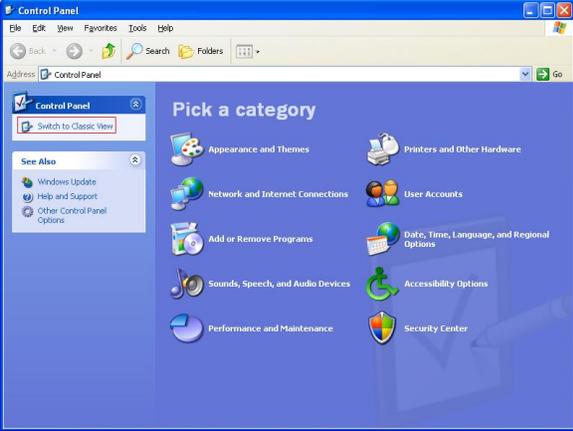
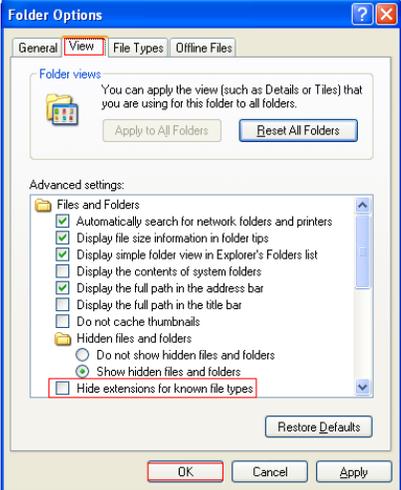
You can use ASCII Transfer to quickly fill departments with items without having to use Inventory Maintenance.

Before using this guide to perform an ASCII import, make a backup of your database. The only way to reverse the changes made by an ASCII import is to restore a Backup of the Database that was created before the import!

To learn how to make a backup of your database use this [Guide](#)

Making file extensions modifiable

Before doing anything else, file extensions have to be modifiable.

	1. Select Start .
	2. Select Control Panel .
	3. If it has not been selected already, select Switch to Classic View .
 Folder Options	4. Select Folder Options .
	5. Select the View tab. 6. Uncheck Hide extensions for known file types if it is checked. 7. Select OK .

Before opening CRE/RPE, a comma-delimited text file needs to be created. This file can be created using Microsoft Excel.

Creating a comma-delimited text file using Microsoft Excel

	A	B	C	D	E	F	G
1	Item Name	Item Number	Cost	In Stock	Price	Department	Retail Price
2							
3							

1. Open Microsoft Excel.
2. Create the following columns in the same order in which they are listed here: **Item Name, Item Number, Cost, In Stock, Price, Department, Retail Price.**

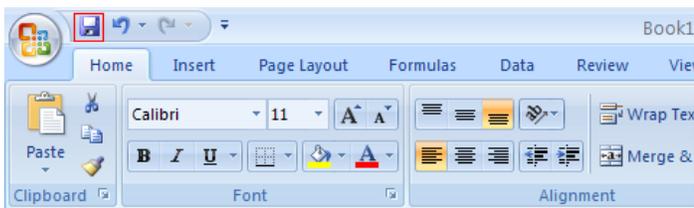
	A	B	C	D	E	F	G
1	Item Name	Item Number	Cost	In Stock	Price	Department	Retail Price
2	Burger	burger	2.99	20	3.99	FastFood	3.99
3	Fries	fries	1.99	20	2.99	FastFood	2.99
4	Nuggets	nuggets	1.5	20	2.5	FastFood	2.5
5							
6							

3. Enter your data. Be sure to follow the following rules:

- **Item Name** can have a maximum of 30 characters and cannot contain commas, quotation marks (single and double), or asterisks. This information will be entered in the **Description** field in inventory Maintenance.
- **Item Number** can have a maximum of 20 characters and cannot contain commas, quotation marks (single and double), or asterisks. This information will be entered in the **Item Number** (or barcode) field in Inventory Maintenance.
- **Cost** must be an integer or real number. This information will be entered in the **Cost** or **Avg Cost** field in Inventory Maintenance.
- **In Stock** must be an integer. This information will be entered in the **# In Stock** field in Inventory Maintenance.
- **Price** must be an integer or real number. This information will be entered in the **Price You Charge** field in Inventory Maintenance.
- **Department** can have a maximum of 8 characters and cannot contain commas. This information will be added as the **Department for this Item** in the dropdown in Inventory Maintenance.
- **Retail Price** must be an integer or real number. This information will be entered in the **Retail Price** field under the **Special Pricing** tab in Inventory Maintenance.

1	Item Name	Item Number	Cost	In Stock	Price	Department	Retail Price
2					3.99	FastFood	3.99
3					2.99	FastFood	2.99
4					2.5	FastFood	2.5
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							

4. Delete the first row by right-clicking on **1** and selecting **Delete**.



	A	B	C	D	E	F	G
1	Burger	burger	2.99	20	3.99	FastFood	3.99
2	Fries	fries	1.99	20	2.99	FastFood	2.99
3	Nuggets	nuggets	1.5	20	2.5	FastFood	2.5

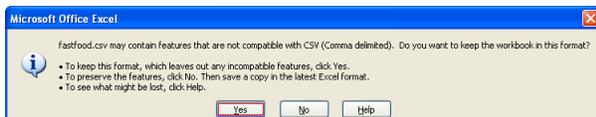
5. Select the image of the floppy disk in the upper left corner of the program.



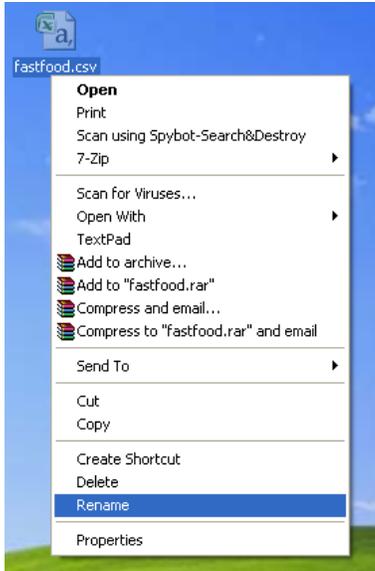
6. Under **Save as type**, select **CSV (Comma delimited)**.
7. Name the file and select **Save**.



8. When warned that the selected file type does not support workbooks that contain multiple sheets, select **OK**.



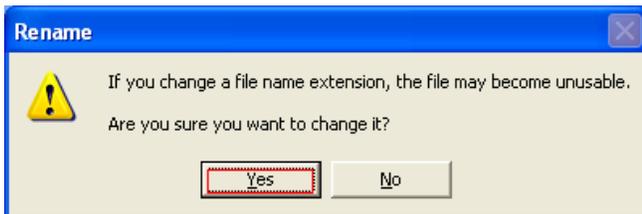
9. When prompted whether to keep the workbook in its current format, select **Yes**.



10. Close Microsoft Excel and find the file that was just created. Right click on it and select **Rename**.



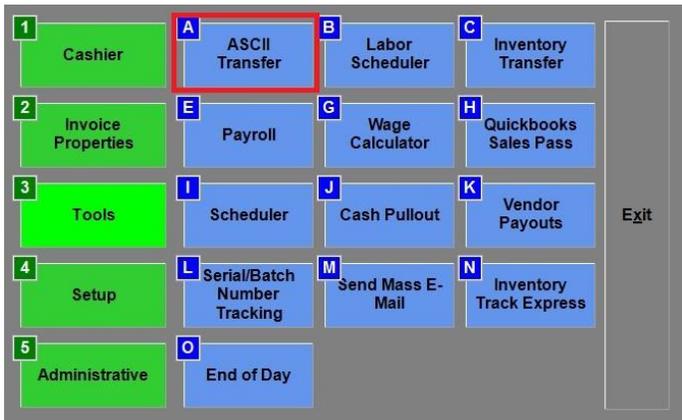
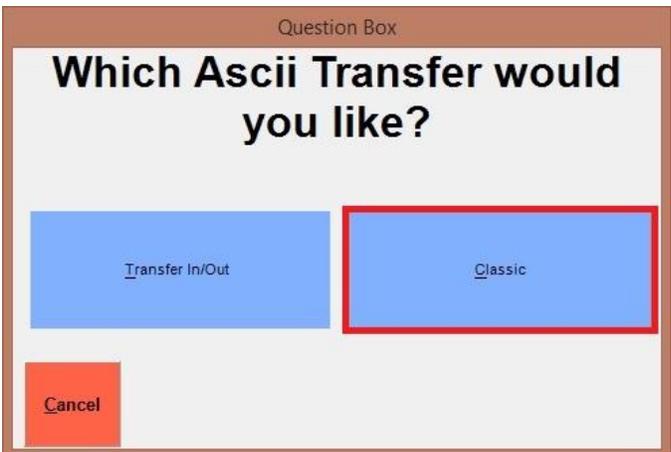
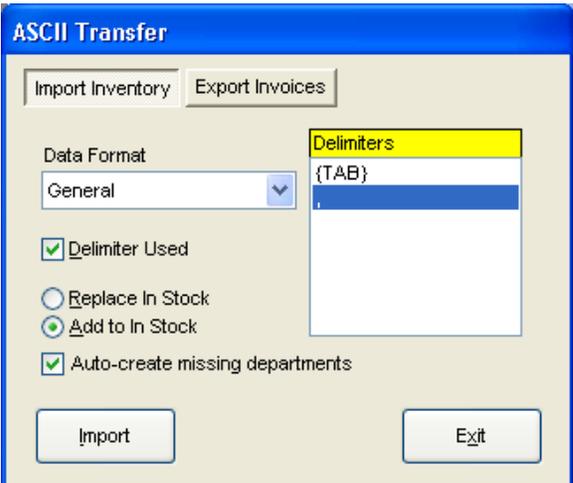
11. Replace **.csv** with **.txt**.

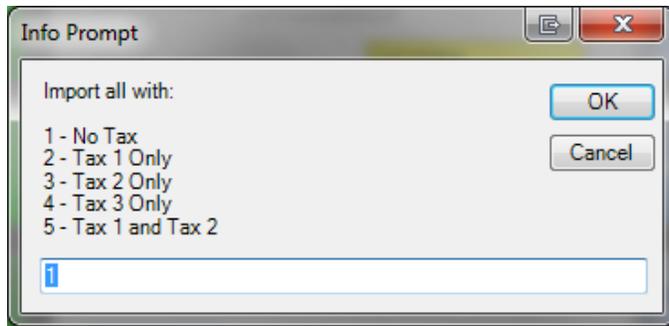


12. When warned about changing the extension of the file, select **Yes**.

Importing inventory using a comma-delimited text file

To import inventory using a comma-delimited text file, open CRE/RPE, select **Manager**, provide the requested credentials and then follow these steps.

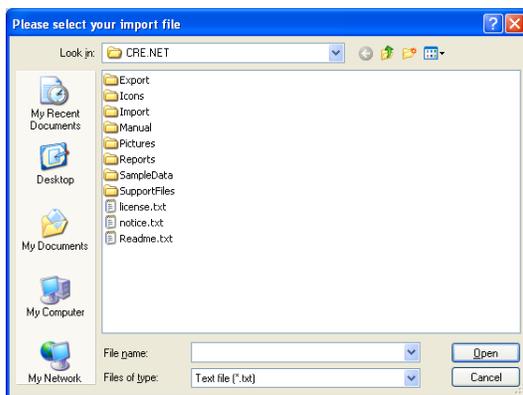
 <p>The screenshot shows a menu with five main categories on the left: 1. Cashier, 2. Invoice Properties, 3. Tools, 4. Setup, and 5. Administrative. The 'Tools' category is highlighted in green. Within the 'Tools' category, the 'ASCII Transfer' option is highlighted with a red box and labeled 'A'. Other options include Labor Scheduler (B), Inventory Transfer (C), Payroll (E), Wage Calculator (G), Quickbooks Sales Pass (H), Scheduler (I), Cash Pullout (J), Vendor Payouts (K), Serial/Batch Number Tracking (L), Send Mass E-Mail (M), Inventory Track Express (N), and End of Day (O). An 'Exit' button is visible on the right side of the menu.</p>	<ol style="list-style-type: none">1. Select Tools and then ASCII Transfer.2. Enter the administrator credentials.
 <p>The screenshot shows a 'Question Box' dialog with the text 'Which Ascii Transfer would you like?'. There are two buttons: 'Transfer In/Out' and 'Classic'. The 'Classic' button is highlighted with a red box. A 'Cancel' button is located at the bottom left.</p>	<ol style="list-style-type: none">3. Select Classic
 <p>The screenshot shows the 'ASCII Transfer' dialog box. It has two tabs: 'Import Inventory' (selected) and 'Export Invoices'. Under 'Data Format', 'General' is selected. The 'Delimiters' list shows '{TAB}' and a comma character. The 'Delimiter Used' checkbox is checked. The 'Add to In Stock' radio button is selected. The 'Auto-create missing departments' checkbox is checked. There are 'Import' and 'Exit' buttons at the bottom.</p>	<ol style="list-style-type: none">4. Check Delimiter Used and select , as the delimiter.<ul style="list-style-type: none">• Replace In Stock will result in already-existent items being overwritten.• Add to In Stock will result in already-existent items being updated.5. Select Auto-create missing departments to create all of the departments specified in the txt file.6. Select Import.



7. Specify how you would like tax to be applied to the items being imported by typing the appropriate number.

- 1 – No Tax
- 2 – Tax 1 only
- 3 – Tax 2 only
- 4 – Tax 3 only
- 5 – Tax 1 and Tax 2

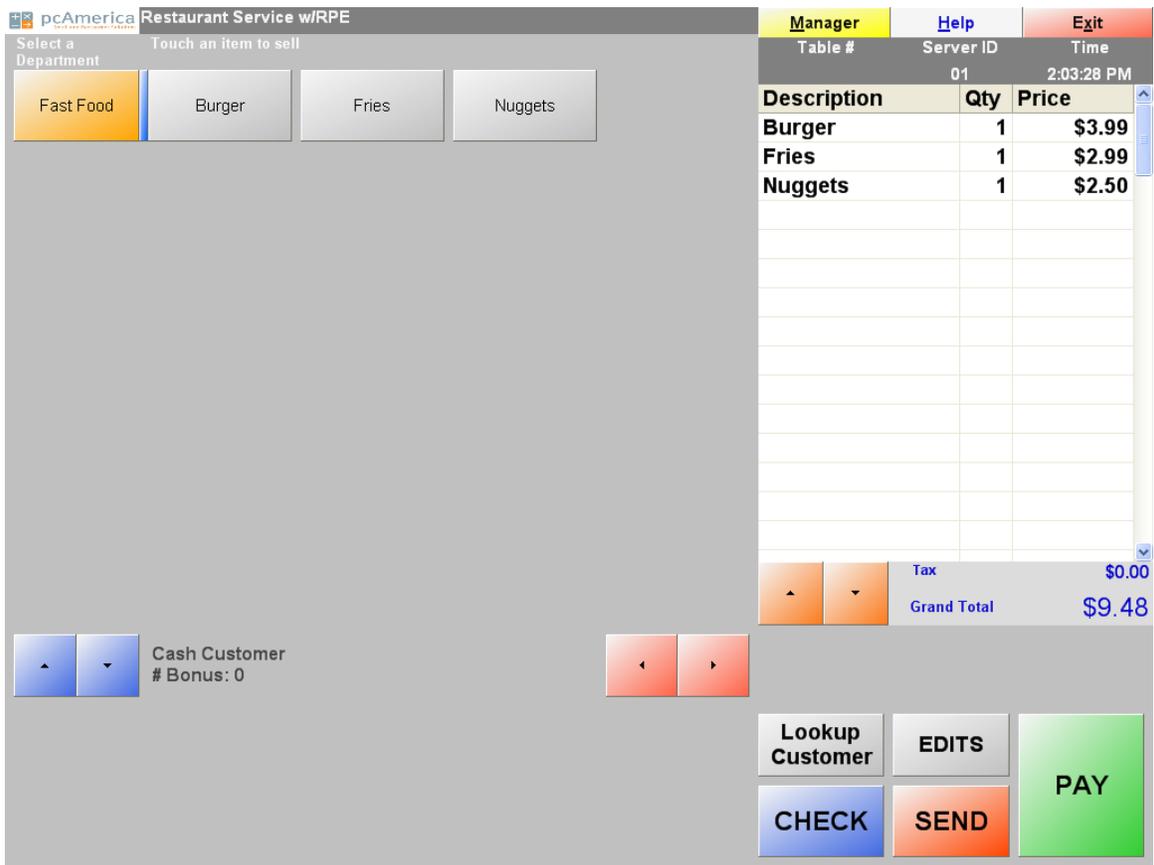
8. Select **OK**.



9. Browse to your comma-delimited text file and select **Open**.



10. You will be notified whether importing was successful.



11. Select the appropriate department on the touch screen and verify that the items have been imported.