



Realizing Profitable Potential through Change

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[Moving Data Into QuickBooks Point Of Sale: Flexible Import Options](#)

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Moving Data Into QuickBooks Point Of Sale: Flexible Import Options

Manual data entry is so over. And it's a good thing: Your responsibilities as the manager of a retail operation are too numerous and time-consuming to have to deal with typing in long lists of customers, vendors and inventory items.

Whether you're using QuickBooks Point of Sale as a standalone application or integrated with QuickBooks, it's easy to import your existing store-related information.

Another Dynamic Duo

Point of Sale was built to be integrated with QuickBooks. So it makes sense that by its tenth version, it has streamlined the connection process. To link the two applications for the first time on one PC, click **Financial | Financial Center | Show Advanced Options**.

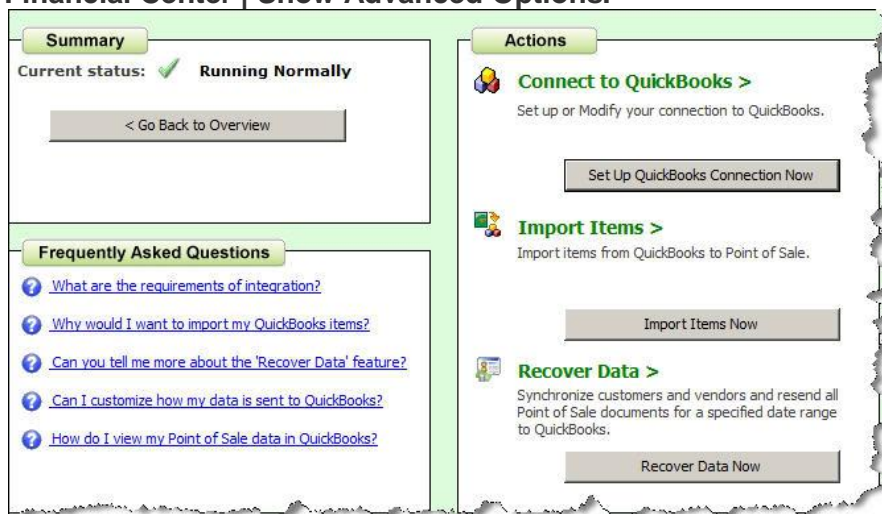


Figure 1: The Advanced Options window in the Financial Center.

Step-by-step wizards walk you through the process of connecting to a QuickBooks file and importing your people and inventory data. Easy stuff, though it gets more complicated if you're running the application on a network. We can work with you if this is the case.

You can update Point of Sale with new or modified QuickBooks data anytime by clicking Financial | Update QuickBooks. And if the Exchange data with QuickBooks box is checked when you're setting up your End of Day Process, a synchronization will also occur then (items must be imported manually after the first time in a separate procedure).

More Complex Imports

What if you're not using QuickBooks or you don't want to integrate the two programs? You can still import databases of customers, vendors and items, but it's a bit more complicated. Point of Sale accept data in three formats:

- Default Template. You can enter data manually in a pre-formatted Excel spreadsheet (or cut and paste).
- Custom File. If you already have an Excel file or a comma-delimited text file, you can map its fields to the matching Point of Sale fields.
- Vendor Catalog.
- Available for items only, this option lets you import by using templates designed for electronic vendor catalogs.

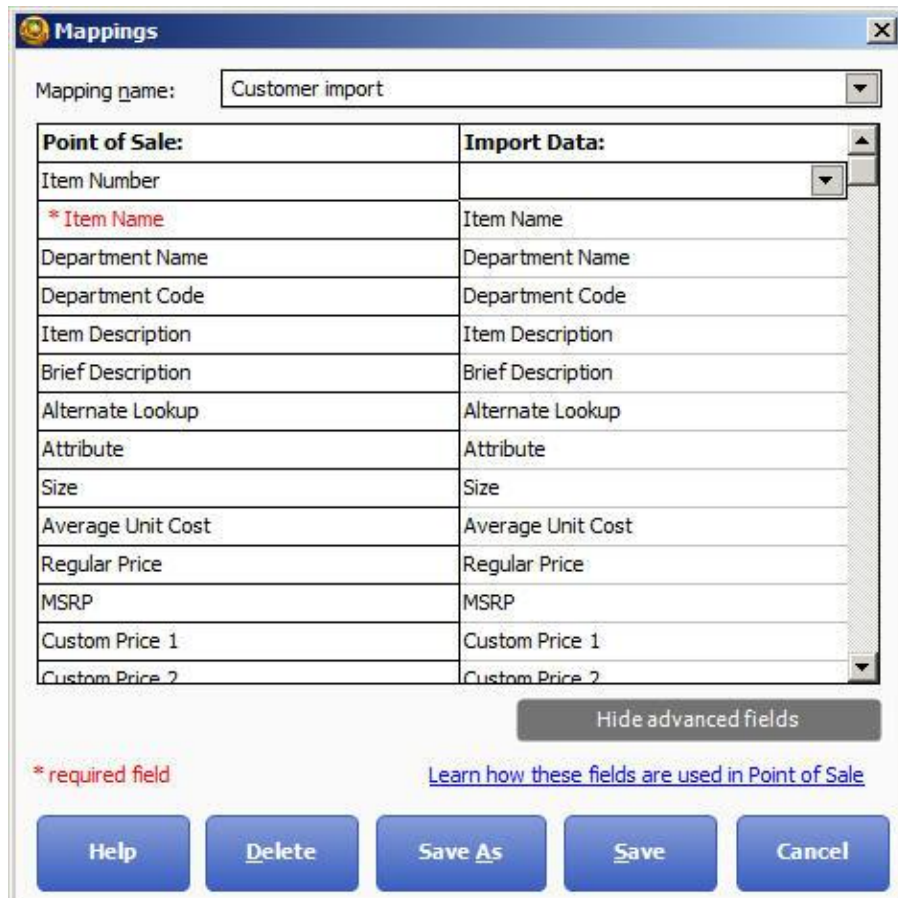


Figure 2: You can map fields from custom files to corresponding Point of Sale fields.

Point of Sale's wizards simplify import activities, but you should contact us before taking on this task for the first time, *especially if your retail operation uses more than one computer and/or you manage multiple stores*. Remote use of Point of Sale is especially complex. We can help ensure that your imports are defined and executed properly, whether you have one workstation or one hundred.

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