



# Customer Import

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Version 4.2

Jack Gerrard  
October 2016

# Foreward

The focus of this document is the creation of Customers for use with uniCenta oPOS in v4.2 and later.

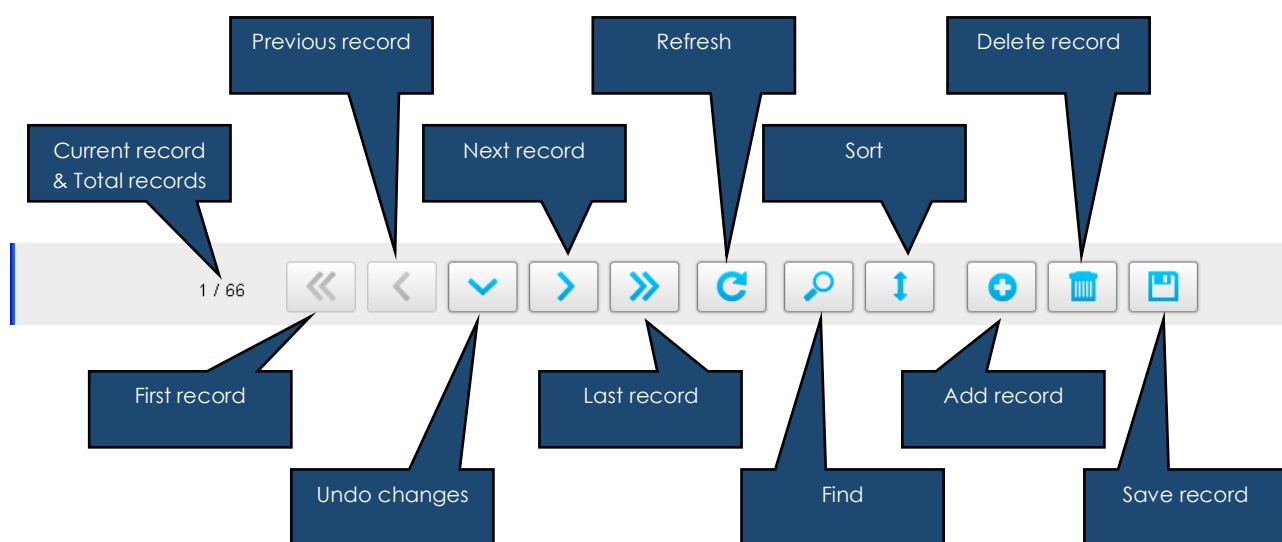
Take things step-by-step and try not to feel too intimidated. Follow this guide and you won't go far wrong.

Date	Version	Author	Comment
October 2016	4.2	Jack Gerrard	Final

## Useful things

### Editor Toolbar

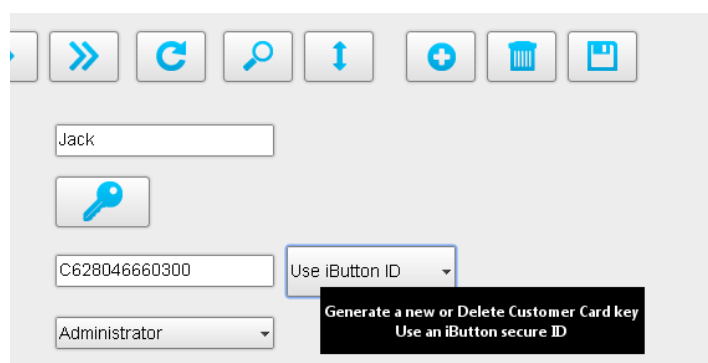
You will see this toolbar is used throughout uniCenta oPOS so here's a quick overview of what the buttons do. The Editor Toolbar appears in all record management forms.



### Tooltips

Lots of things in uniCenta oPOS use pop-up Tooltips.

All you have to do is hover your mouse pointer over a component for a second and it will give you a brief description of what it does. Tooltips are constantly being added or revised as uniCenta oPOS development progresses.



# CUSTOMER IMPORT

Customer Import can be found in the TOOLS panel and serves a single purpose:

1. Importing new Customers

The import file – the source - must be in Comma Separated Value (CSV) format and can originate from something like Microsoft's Excel or your preferred text editor.

Here are the basic rules to follow when building any CSV file:

1. The first line of the source file must contain field headers. These do not have to be the same as the uniCenta oPOS Customer record's form fields though it is advisable to make them at least similar so they can be identified more easily.
2. All fields must be a text string separated by a comma (,)
3. The end of each row must be completed by a CarriageReturn(CR) and LineFeed(LF)

Using an app' like Excel will automatically add these for you.

See the [customers\\_import\\_example.csv](#) and [customers\\_import\\_example.xlsx](#)

# SOURCE FILE

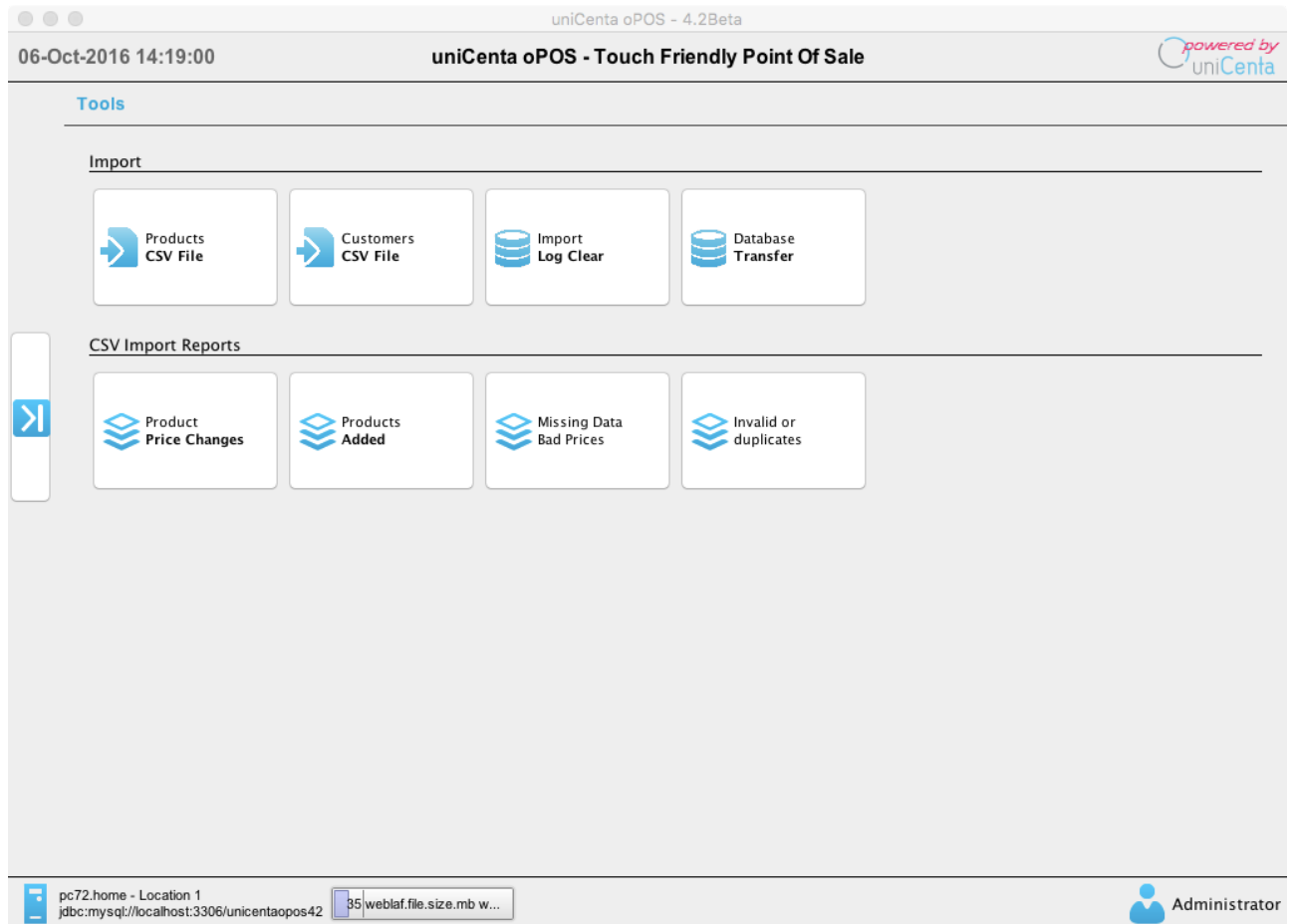
Fields in bold are Mandatory

<b>SEARCH KEY</b>	Must be unique. Up to 250 characters. This field can be your own construct.
<b>NAME</b>	Up to 250 characters. Duplicates are acceptable.
ACCOUNT ID	Up to 250 characters. Duplicates are acceptable.
ALL ADDRESS LINES	Up to 250 characters. Duplicates are acceptable.
FIRST & LAST NAME	Up to 250 characters. Duplicates are acceptable.
EMAIL & TELEPHONES	Up to 250 characters. Duplicates are acceptable.

**Example CSV file construct:**

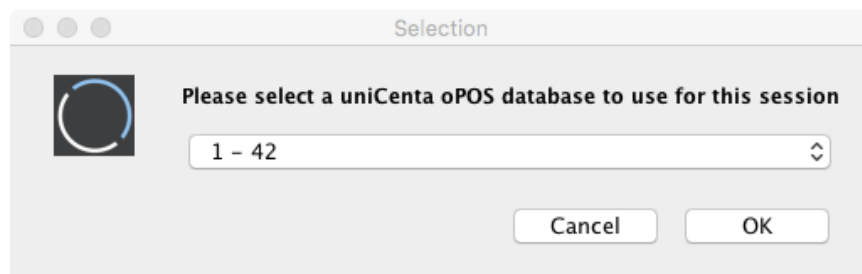
**SEARCHKEY, NAME, ACCOUNTID**  
Nongshim,Nongshim,98

# UTILITIES TOOLS



Touch the **Customers CSV File** to start.

If you have your Configuration set to use two databases the pop-up below will appear. Select the current database in use.

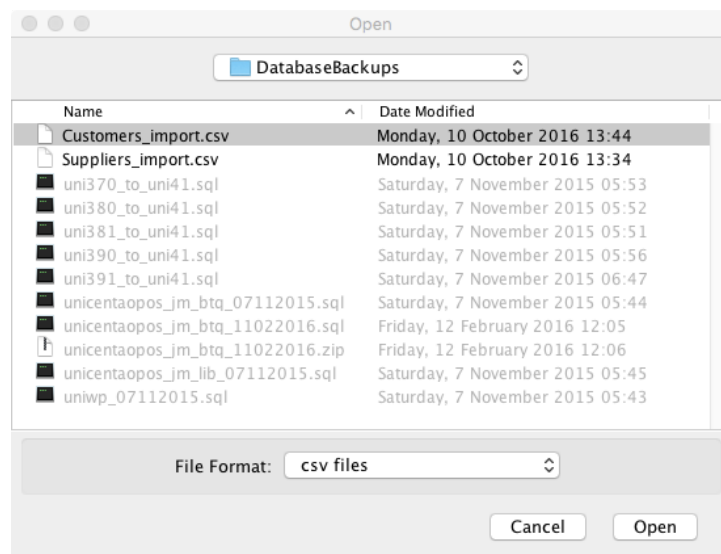


Selecting Cancel will immediately close uniCenta oPOS and you will need to restart.

# CUSTOMERS IMPORT

The screenshot shows the 'uniCenta oPOS - Touch Friendly Point Of Sale' interface. At the top, it displays the date and time '10-Oct-2016 15:07:00' and the version '4.2Beta'. The main heading is 'Customers CSV File'. Below this, there is a 'File' input field with a folder icon. A 'Separator' dropdown menu is set to '..'. A 'Read Header' button is present, and a 'Waiting...' status bar is shown. On the left, there is a vertical sidebar with a blue arrow icon. The main area contains a form with various input fields: 'Search Key', 'Name', 'Account ID', 'Address Line 1', 'Address Line 2', 'Town/City', 'State/County', 'PostCode', 'First Name', 'Last Name', 'email', 'Telephone', 'Mobile Phone', and a 'Visible' checkbox. At the bottom of this form are 'Reset' and 'Import CSV' buttons. On the right, there is a 'Status' section with a table showing counts for 'Records Found', 'New Customers', 'Invalid Customers', 'Updated Customers', 'Missing Data', 'Bad Items', and 'Not Changed'. The bottom status bar shows the user is logged in as 'Administrator'.

The first step is to select the source Customer CSV file to import.



By default only CSV files are shown in the file list. If the source file has a different filename.suffix choose the All files File Format from the drop-down box.



# CUSTOMERS IMPORT

The screenshot shows the 'Customers CSV File' import screen in the uniCenta oPOS application. The window title is 'uniCenta oPOS - 4.2Beta' and the subtitle is 'uniCenta oPOS - Touch Friendly Point Of Sale'. The date and time are '10-Oct-2016 15:12:15'. The file path is '/volumes/DataStore/DatabaseBackups/Customers\_import.csv'. The separator is set to comma. The 'Read Header' button is visible. The 'Imported 0%' progress bar is shown. The 'Search Key' is 'SEARCHKEY'. The 'Name' is 'CustomerName'. The 'Account ID' is 'ACCOUNTID'. The 'Address Line 1' and 'Address Line 2' are empty. The 'Town/City', 'State/County', 'PostCode', 'First Name', 'Last Name', 'email', 'Telephone', and 'Mobile Phone' fields are empty. The 'Visible' checkbox is checked. The 'Reset' and 'Import CSV' buttons are at the bottom. The 'Status' panel on the right shows 'Records Found: 142', 'New Customers', 'Invalid Customers', 'Updated Customers', 'Missing Data', 'Bad Items', and 'Not Changed'.

The next step is to choose the Separator. The default separator is comma(,)

Next choose the Read Header button. uniCenta oPOS will open the file and will immediately read all the rows into memory

Select the appropriate field from the drop-down box list to match the label to the left. Remember, the first line of the source CSV file is used to fill the drop-down box content.

Until all the mandatory fields are completed the Import CSV button will remain disabled.

## Show check-box

Ticking this will set the Customer to available in the sales screen. Whether checked or un-checked new Customers are still added and visible in the Customers form.

## Reset button

Clears all of the import form's fields.

## Import CSV

Starts the import process. Progress is shown above **Status** area.

# CUSTOMERS

uniCenta oPOS - 4.2Beta

10-Oct-2016 15:31:23

uniCenta oPOS - Touch Friendly Point Of Sale

powered by uniCenta

### Customers

\* / 142

Account ID  Search Key

Name

Card ID

Visible ☒

Customer Tax Categ...  VIP ☐ Discount  %

Credit Limit  Debt Date

Current Debt

Contact Address Transactions Photo Notes

First Name

Last Name

email

Telephone

Mobile Phone

Fax

pc72 home - Location 1 jdbc:mysql://localhost:3306/unitest2 27 web1af.file.size.mb w... Administrator

This form shows an example of newly created Customers from the source CSV file.

# SALES SCREEN

uniCenta oPOS - 4.2Beta

06-Oct-2016 15:09:50

uniCenta oPOS - Touch Friendly Point Of Sale

powered by uniCenta

Item Price Units Taxes Value Pri...

Account ID Search Key Postal Name Phone 1 Email Address

Administr

Reset Execute

BOTTLE

BOTTLE BEER

BOURBON

BRANDY

Category Standi

CHAMPAGNE

4-me

Ajinomoto Foods

Apricot Foods

ARO

Asian Home Gourmet

Asian Room

Badshah

Bakels

Baketch

Beksul

Birdy

Bulldog

CE

\*

-

1

2

3

+

4

5

6

7

8

9

=

0

.

BOMBAY

DISARONNO -

100%

ACK DANIELS

JAGERMEISTER -

pc72.home - Location 1

jdbc:mysql://localhost:3306/unicentaopos42

73 webjaf.file.size.mb w...

Administrator

uniCenta oPOS - 4.2Beta

10-Oct-2016 15:43:15 uniCenta oPOS - Touch Friendly Point Of Sale

powered by uniCenta

List  
Export

Run Report

46.13% 1

Account	Name	First Name	Last Name	Address	Address2	City	PCode	Telephone	eMail
1	4-me								
2	Ajinomoto Foods								
3	Apricot Foods								
4	ARO								
5	Asian Home								
6	Asian Room								
7	Badshah								
8	Bakels								
9	Baketeck								
10	Bek'sul								
11	Birdy								
12	Bulldog								
13	Burgess								
14	Carell								
15	Cape Herb Spice								
16	Chankee								
17	Chaokoh								
18	Cheiljedang								
19	Chin Chin								
20	Chupa Chups								
21	Cirio								
22	Cisco's								
23	COCK Brand								
24	Denny								
25	Diamond FX								
26	Dole								
27	Double Luck Brand								
28	Duncan Hines								
29	Ebisu								
30	Everyday								
31	Eves Tea House								
32	Farmhouse								
33	Fortune Cookie								
34	Fu-Chi Brand								
35	Glico								
36	Goldcrest								
37	Golden Mountain								
38	Golden Phoenix								
39	Grand Mountain								
40	Greenland								
41	Guam Sheng Yuan								

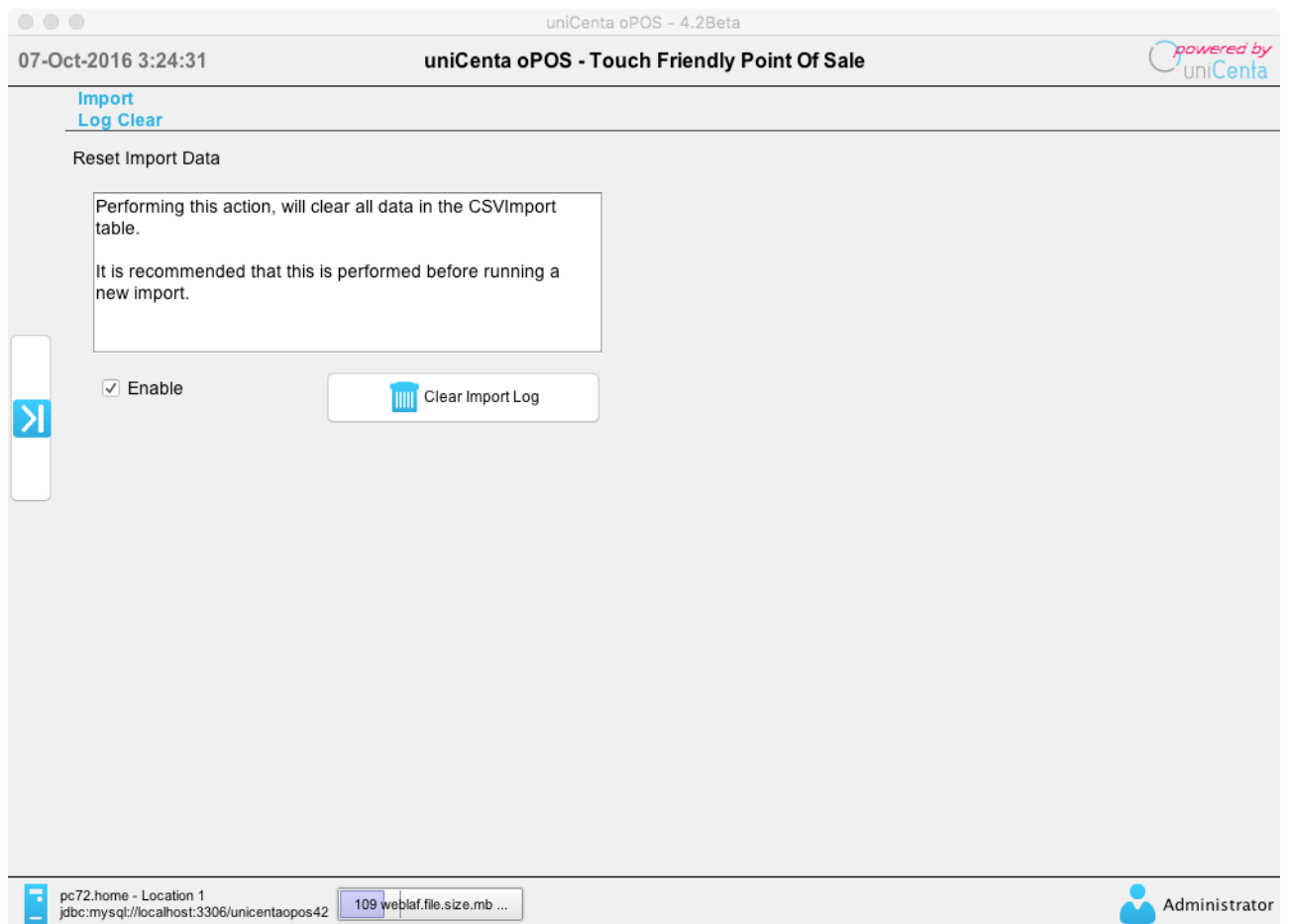
Page 1 of 4

pc72.home - Location 1  
jdbc:mysql://localhost:3306/unittest2

77 webfile.file.size.mb w...

Administrator

# IMPORT LOG



During the import process each row is written to a logging table called csvimport.

The log table can be retained for as long as required and is useful as a point of reference to compare the original source CSV file.

Choosing the Import Log Clear option will delete **all** imported records from the log table.

# PERFORMANCE

Here is a sample performance report from a Customer CSV Import process:

Elapsed Time: 2min's : 05sec's

Machine: Apple MacBook Air 1.4GHz 2GB RAM OS X El Capitan

Count snapshot of main table:

<b>TABLES</b>	<b>RECORDS</b>
customers	142

## Tip:

Un-Check the System>Configuration>General tab>Hide Footer Status Bar to show the dynamic memory meter.

If you have a very large source CSV file and a low specification computer you can use the information shown here to fine-tune the uniCenta oPOS start.bat or start.sh

For example:

Rows	100,000
PC RAM	2GB
File	start.bat
Change	-Xmx1024 to -Xmx2048

```
start /B javaw -Xms512m -Xmx2048m -cp %CP% -Djava.library.path="%DIRNAME%\lib\Windows/i368-mingw32" -Ddirname.path="%DIRNAME%\.\" -splash:unicenta_splash_dark.png  
com.openbravo.pos.forms.StartPOS %1
```