

## Topic: DATABASE CREATION TIPS – USING THE IMPORT DATA (ITEMS) FEATURE

When first creating your Uniwell Lynx database at the time of installation, by far the easiest way to build the initial data is to import the items using the Import Data feature in Uniwell Lynx.

FAQ: What is the format of the file that I can import into Uniwell Lynx?

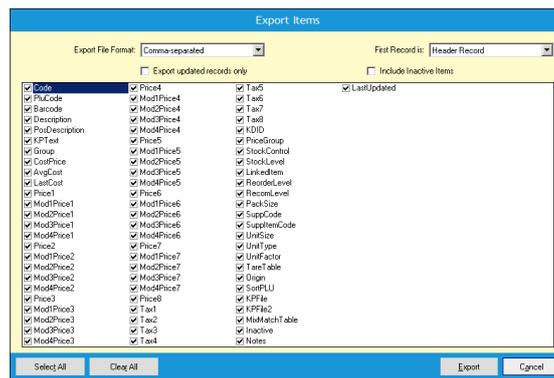
- Uniwell Lynx can import a Comma-separated (\*.CSV) or Tab-delimited text file (\*.TXT)
- The first record (row) of the file contains Headers that designate the specific data contained in the column below – the headers must exactly match Uniwell Lynx requirements for the Import Data to be successful
- The import file doesn't need to contain all the possible columns – you can choose a subset of the Item-related fields to import
  - If the import file contains new Items previously not created in the Uniwell Lynx database, the Code and Group associated with the item must be included in the import file or the data will be rejected
  - If the import file contains additional information about previously created/imported Items, Uniwell Lynx uses the Code field as the primary index for the item and adds data in the fields being imported for that code
  - Where the import file contains data for an existing field that already contains a value, the import will overwrite the existing value

Code	PluCode	Barcode	Description	Group	CostPrice	Price1	Tax1	Tax2
1001	1001		Café Latte	1	0	4.5	1	0
1002	1002		Cappuccino	1	0	4.5	1	0
1003	1003		Flat White	1	0	4.5	1	0
1004	1004		Macchiato	1	0	4	1	0
1005	1005		Short Black	1	0	4	1	0
1006	1006		Espresso	1	0	4.5	1	0
1007	1007		Long Black	1	0	4.5	1	0
1008	1008		Vienna	1	0	8	1	0
1009	1009		Affogato	1	0	8	1	0
1010	1010		Piccolo	1	0	4	1	0
1011	1011		Hot Choc	1	0	4.5	1	0
2001		9012345678906	Soft Drink	2	0.7	3	1	0

Figure 1 - Sample CSV file for import into Uniwell Lynx

FAQ: How do I create a valid Excel spreadsheet to build the import file?

- Create an Excel spreadsheet (typically \*.XLSX) with one Worksheet
- On the opening row, type in the appropriate Header that relates to the fields you wish to import
  - To ensure that the header corresponds exactly with Uniwell Lynx requirements, perform an Export Data of Items from an empty Uniwell Lynx database and selecting the fields you want to import – the resulting CSV file will contain the exact characters required for your Header Record



- **Important tip:** If importing barcodes, ensure that the 'Barcode' column in the spreadsheet is formatted as 'Text' – not 'General' or 'Number'. This ensures that the barcode remains correct when the spreadsheet is converted to CSV
- Once the data in the spreadsheet is ready to import into Uniwell Lynx, 'Save As' a CSV (Comma Delimited) (\*.csv)

FAQ: How do I import the CSV or TXT file I have created into Uniwell Lynx?

- Go to the Import Data > Items screen (File menu), select the Import File Format and click Import to choose the file
- Once the import begins, Uniwell Lynx shows the progress and notifies the end-user of how many records were successfully imported, and how many failed
  - During the import data process rejected records are written to a text file and an error column is added to the file to provide details of why the records were rejected