



“To know I can check and see how the store is doing even without being there is very helpful.”

Reveille Joe Coffee, *Coffee Shop*

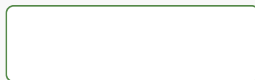
#### Questions?

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## Importing Items

If your inventory data is stored in another file or format, such as Excel or CSV, you can easily transfer the information to our system. Before doing an item import, you must have at least one tax category set up and one tax category selected as your default.

Please make sure your import file has 999 items or less in it. If you have more than 999 items, you will need to separate your master file into smaller files and then import them one file at a time. Also, make sure that you have entered values for all of the required fields (**Category, Item Name, Price**). When you begin your import, we will check your import file to ensure that there are no more than 999 items in your file and that all of the required fields have a value in them. If either of these "pre-tests" fail, the system will alert you.



If you will sell items that have different **tax categories**, such as food, alcohol, general merchandise, etc., go ahead and create those tax categories first. Then, ensure you have the same exact name for the tax categories in your import file, and the system will assign all your items to your selected tax categories during the import process.

To import items:

1. **Select INVENTORY > CATEGORIES & ITEMS** and then click the **Import Items** button to display the **Import Items** screen.
2. Review the sample file on the screen, as well as the instructions for each field in the file.
3. Click **Download Template** to download the file template. (Shown at the end of this page)
4. Copy your inventory data into the sample file or modify an existing item list to match the format of the sample file. Save this file to your local computer with a name you will recognize. Ensure your data matches up with the appropriate column headers. Also, make note of the required fields.
5. Click **Browse to Select File** and select your inventory data file, and click **Open**.



The system will do 2 pre-tests on your import file. The first will be to count the number of items in your file. Make sure you have no more than 999 items in your import file. If you have more than 999 items, the system will alert you to separate your list into multiple files. The second test will be to make sure that all of the required fields have a value in them. If a required field is blank, the system will alert you to fix this in your import file and try again.

6. Click **Review Item List** at the bottom of the screen and review the data in your inventory file when it displays on the screen. When the screen refreshes, you may see rows of your

data displayed with red exclamation points at the beginning of the row. This means that there was an error in that row that the system could not resolve. Click on the red exclamation point for each row to see the error(s) on that row. You can edit the information on the screen, or if you have multiple errors, you may choose to cancel your current import, go back to fix the errors in your source file, and begin the import process again with your updated file.

Item Category	Item Name	Description	Bar Code	PP	Unit Cost	Price	Sold By Weight/Measure	Tax Category	Available for Sale on POS	Package Cost	Units/Package	Primary Vendor
<input checked="" type="checkbox"/>	DESSERTS	Apple Pie Slice		!	3.00	4.50	No	Food	Yes			
<input checked="" type="checkbox"/>	DESSERTS	Blueberry Pie Sl.		!	3.00	4.50	No	Food	Yes			
<input checked="" type="checkbox"/>	DESSERTS	Chocohale Pie S.		!	3.00	4.50	No	Food	Yes			
<input checked="" type="checkbox"/>	DESSERTS	Lemon Pie Slice		!	3.00	4.50	No	Food	Yes			
<input checked="" type="checkbox"/>	ICE CREAM	Chocohale 1 St.		!	0.75	1.50	No	Food	Yes			
<input checked="" type="checkbox"/>	ICE CREAM	vanilla 1 Scoop		!	0.75	1.50	No	Food	Yes			

- Make any edits to the data on the screen, and when you are satisfied with the data, make sure the check box is selected for each item you want to import.
- Click **Import Item List** at the bottom of the screen. A message appears, indicating the number of items you are about to import. Click **Yes** to start the import.
- When the import is finished, the **Import Details** screen displays the results of the import, including the number of items that were successfully imported and the number of items that could not be imported (these are usually duplicates).

6 item(s) successfully imported. Search Items grid to view imported item(s) after exiting.

0 item(s) not imported.

Item Category	Item Name	Description	Bar Code	PP	Unit Cost	Price	Sold By Weight/Measure	Tax Category	Available for Sale on POS	Package Cost	Units/Package	Primary Vendor

- Review the inventory records that were not imported, so you can make the necessary corrections to your file and import them again.
- Click **Exit** at the bottom of the screen to close the **Import Items** screen.
- Click to display the newly-imported items.

J	A	B	C	D	E	F	G	H	I	J	K	L	M
1	REQUIRED Category	REQUIRED Item Name	Description	Barcode	Prompt for Price	Unit Cost	Price	REQUIRED Sold by Weight/Measure	Tax Category	Available for Sale on POS	Package Cost	Units/Package	Primary Vendor
2	Drinks	Bottled Water	Water	123456	N		1.99	N	Sales Tax	Y	8.50	24	ABC Vendor
3	Deserts	Cake Slice	Slice of Cake		Y	0.75	2.99	N	Sales Tax	Y			Cake King
4	Mexican	Chicken Fajitas	Grilled Chicken Fajitas			3.25	9.99	N	Sales Tax	Y			
5	Mexican	Chicken/Steak Fajita	Chicken and Steak Fajitas			4.20	10.99	N	Sales Tax	Y			
6	Sides	Chips	Chips	232123	Y		0.99	N	Sales Tax	Y	7.25	24	DEF Vendor
7	Sandwiches	Grilled Chicken Sand	Grilled Chicken Sandwich		N	1.75	6.99	N	Sales Tax	Y			
8	Del Meat	Oven Roasted Turkey	Oven Roasted Turkey		Y		7.94	Y	Sales Tax	Y			

Alphanumeric 10 characters maximum.  
 Alphanumeric 30 characters maximum.  
 Alphanumeric 20 characters maximum.  
 Y or N Y = Yes, N or blank = No.  
 Numeric 20 characters maximum. Not required - can be left blank.  
 Numeric 2 decimal places, no \$ sign. Not required - can be left blank.  
 Numeric 2 decimal places, no \$ sign. Not required - can be left blank.  
 Y or N Y = Yes, N or blank = No.  
 Y or N Y or blank = Yes, N = No.  
 Alphanumeric 30 characters maximum.  
 Numeric 2 decimal places, no \$ sign. Not required - can be left blank.  
 Alphanumeric 40 characters maximum. Not required - can be left blank.  
 Numeric If the item is received by Package, enter a number that is greater than 1.  
 If item is received individually, enter 1 or leave the field blank.

Keywords: importing items, importing data

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