

Sircle POS

Importing Inventory

Step 1 - Creating the Inventory File

The feature provides the business the option to customize inventory . The amount of time to create the inventory file will depend on the number of inventory items to be created. For many businesses, with hundreds or perhaps even thousands of inventory items, the easiest and quickest means to set up inventory is utilizing an excel file and uploading the information.

The creation of this inventory file, may take time, however, it may lead to better accuracy. The actual importing of the inventory file should take only a few minutes to complete once the file is created.

To import inventory, a Microsoft Excel* file must be created utilizing the file format below. Refer to Page 2 and below for more details. There should be no comma in any of the field and header should be in lower case in exact order as given here.

- Column A **item_no:** - Create an item number used to look up the item, or alternatively use the item UPC barcode. We recommend using the product UPC barcode whenever possible, if in future you may have plans to utilize a barcode scanner (not included with system) to scan and ring up a sale
- Column B **item_name** – Describes the item. Maximum 50 characters. Recommended less than 15 characters
- Column C **cost** - Enter cost of the inventory item.
- Column D **price** – Enter the retail price which the item will be sold.
- Column E **item_stock** - Enter the quantity in inventory
- Column F **tax_rate1** - Enter True if tax rate 1 applies to the inventory item. Enter False if tax rate 1 does not apply

Column G **tax_rate2** - Enter True if tax rate 2 applies to the inventory item. Enter False if tax rate 2 does not apply

Column H **tax_rate3** - Enter True if tax rate 3 applies to the inventory item. Enter False if tax rate 3 does not apply

Column I **department_name** . Maximum 50 characters. Recommended less than 15 Characters

Column J **re_order_level** - Enter quantity if you would like to be alerted to low inventory

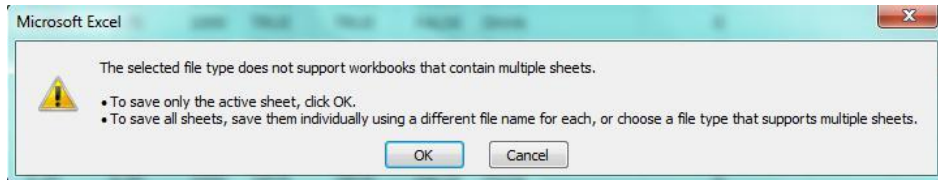
Example of Excel File Format

item_no	item_name	cost	price	item_stock	tax_rate1	tax_rate2	tax_rate3	department_name	re_order_level
41679635124	nutrment banana	1.99	1.99	100	TRUE	FALSE	FALSE	none	10
49200047651	10 lbs sugar	0	7.49	100	TRUE	FALSE	FALSE	none	10
77236000302	12 farmfresh eggs	0	2.49	100	TRUE	FALSE	FALSE	none	10
90208014633	12 large eggs	2.49	2.49	100	TRUE	FALSE	FALSE	none	10
712841088061	18 pk large eggs	2.49	2.99	100	TRUE	FALSE	FALSE	none	10
77236000357	18LARGE EGGS WIC	2.99	2.99	100	TRUE	FALSE	FALSE	none	10
90478216225	2 liters jarritos	0	2.24	100	TRUE	FALSE	FALSE	none	10
895216001862	4 Loco 4pk	0	6.5	100	TRUE	FALSE	FALSE	none	10
899155002027	4.0 gpa 2oz	2.5	2.5	100	TRUE	FALSE	FALSE	none	10
225140	5 gum rain	0	1.61	100	TRUE	FALSE	FALSE	none	10
22000117014	5 gum react	1	1.61	100	TRUE	FALSE	FALSE	none	10
719410500016	5 hour	2.5	2.5	100	TRUE	FALSE	FALSE	none	10
719410700010	5 hr extra strength energy	0	2.76	100	TRUE	FALSE	FALSE	none	10
22000116024	5GUM	0	1.61	100	TRUE	FALSE	FALSE	none	10
225120	5gum peppermint	1.65	1.65	100	TRUE	FALSE	FALSE	none	10
229570	5gum solstice	0	1.61	100	TRUE	FALSE	FALSE	none	10
22000116970	5GUMS	0	1.61	100	TRUE	FALSE	FALSE	none	10
719410300012	5hour energy	0	2.3	100	TRUE	FALSE	FALSE	none	10
760695020324	6 eggs	1.25	1.25	100	TRUE	FALSE	FALSE	none	10
70662060032	6pk chicken noodles	1.99	1.99	100	TRUE	FALSE	FALSE	none	10
25932650642	70 sheets book	0	1	100	TRUE	FALSE	FALSE	none	10
109153	75 ft foil	0	2.89	100	TRUE	FALSE	FALSE	none	10
78000001617	7up 20oz	0	1.38	100	TRUE	FALSE	FALSE	none	10

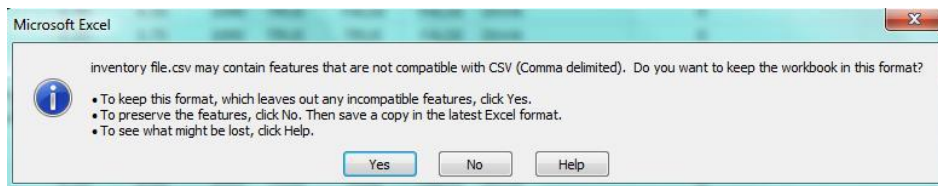
1. Create the inventory file. Once the file is completed, from the Excel drop down menu, save the file in CSV format

File name:	inventory file
Save as type:	CSV (Comma delimited)

2. Depending on which version of Microsoft Excel you are working with, you may be asked about multiple sheets. Press the OK button



3. You may also be asked if you want to keep the file in CSV format. Press the Yes button.



4. Your file is now ready to be uploaded to Sircle POS. **Proceed to Step 2**

Step 2 – Saving Inventory File to Sircle POS

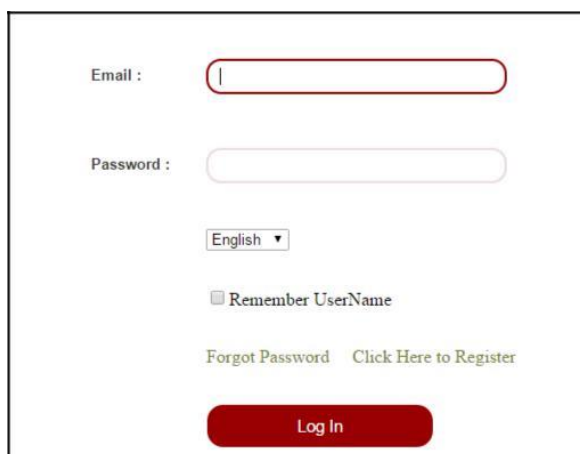
There are 2 ways to save the inventory to your system. Both options require you to log into Sircle POS Back Office.

- Option 1 - Utilizing any computer (with internet). **Recommended**
- Option 2– Utilizing the Tablet (with internet)

As you likely created the excel and csv file on a computer, your csv file is likely saved on your PC. This allows for quick uploading of the excel csv file using Sircle POS back office.

Option 1 – Utilizing a Computer (Recommended):

1. Open your web browser. Go to <http://backoffice.sirclepos.com>
2. Enter the email and password provided, followed by clicking the Login button

A screenshot of the Sircle POS Back Office login page. It features a white background with a black border. The form includes an 'Email' field with a red outline, a 'Password' field with a light gray outline, a language dropdown menu set to 'English', a 'Remember UserName' checkbox, and links for 'Forgot Password' and 'Click Here to Register'. A red 'Log In' button is at the bottom.

3. Select **Import** from the main screen option



Step 2 – Saving Inventory File to Sircle POS

4. Select **Import Inventory**

Import

What would you like to import?

Import Department

Import Inventory

5. Select the **Choose File** button.

Import Inventory

Choose File

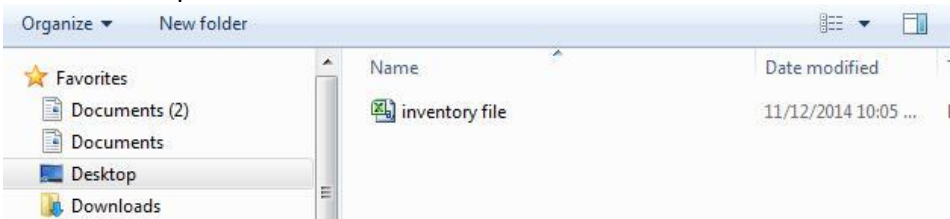
No file chosen

Download sample excel sheet

Please Note: None of the fields should contain commas

Item No	Item Name	Cost	Price	Item Stock	Tax 1	Tax 2	Tax 3	Department Name	Reorder Point

6. Select the csv file imported.



Step 2 – Saving Inventory File to Sircle POS

7. Press the **View Inventory** button.

Import Inventory

[Choose File](#) download file doc172014.csv [Download sample excel sheet](#)
Please Note: None of the fields should contain commas

Item No	Item Name	Cost	Price	Item Stock	Tax 1	Tax 2	Tax 3	Department Name
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[View Inventory](#) [Cancel](#)

8. Press the **Save and Upload** button. Your inventory will now be uploaded to the POS software Enter Point of Sale to view the inventory which you have uploaded.

[Choose File](#) No file chosen [Download sample excel sheet](#)
Please Note: None of the fields should contain commas

Item No	Item Name	Cost	Price	
1	1	Coffee - S	1.14	1.9
2	2	Coffee - M	1.26	2.1
3	3	Coffee - L	1.5	2.5
4	4	Latte - S	1.95	3.25
5	5	Latte - M	2.25	3.75
6	6	Latte - L	2.7	4.5
7	7	Spec. Latte S	2.25	3.75
8	8	Spec. Latte M	2.4	4
9	9	Spec. Latte L	2.85	4.75
10	10	Espresso	1.32	2.2
11	11	Double Espresso	1.74	2.9
12	12	Tea	1.14	1.9
13	13	Extra Shot	0.3	0.5
14	14	Soda - S	1.2	2

[Save and Upload](#) [Cancel](#)

* All brand names are trademarks of their respective owners

Step 2 – Saving Inventory File to Sircle POS

Option 2 – Utilizing the Tablet

1. Save the csv file on your tablet. Note: This csv file can be saved to the tablet by utilizing a TF card.
2. On your Tablet, open the web browser. Go to <http://backoffice.sirclepos.com>. Proceed with Steps 2-8 as outlined in Option 1

Congratulations! You have completed the inventory upload process. For more information, please refer to other Quick Reference Guides