

# MASTER UPLOAD

## WALKTHROUGH

Access the WebPOS home page (URL <http://www.alliancepos.net>) and click on Headquarter System.



## Go to Maintenance > Upload Master Data

Home Daily Operation Sales Report Inventory Master Records **Maintenance** Logout

**Sales Dashboard**

Branch: (All) Date: 02/21/2012 Panel:

Report: Sales Trend Period: Jan 22 - Feb 21, 2012 Refresh every (mins):

Revenue (Base Product)

1. Blackberry 9

The screenshot shows the 'Maintenance' menu with the following items:

- POS Terminal
- Company Information
- Security Access
- Audit Trail
- Upload Master Data**
- Change Password
- User Account
- Help Desk Support
- Local Options

The Sales Dashboard features two bar charts. The left chart shows sales data for the period Jan 22 - Feb 21, 2012, with values ranging from 0 to 120,000. The right chart shows revenue for '1. Blackberry 9', with values ranging from 0 to 2.0.

## Upload Master Data

Type:	Account Master	Download Template
Write Mode:	Account Master	
Upload Status:	Customer Type	
	Price Level	
	Product Master	
	Packing Code Master	

**Note:**

- 1. Please use this function with utmost care. You cannot undo your changes.**
2. Dependent records may become invalid once their primary record is deleted.
3. Maximum Allowable File Size: 98KB
4. Maximum Allowable Record Lines: 10,000

You may upload the following data by batch (choose from Type):

Account Master

Generic Name Master

Customer Type

Product Category

Price Level

Price Master

Product Master


\*Inventory (see How to Manage Inventory by Batch)


Packing Code Master


# Sample Excel File

mst\_account-20120306103127.xls - OpenOffice.org Calc

File Edit View Insert Format Tools Data Window Help



Arial 9 **B** / U


A1  = mst\_account Account ID Max 20 chars, alphanumeric Required, Unique

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	mst_account Account ID Max20 chars , alphanumeric Required, Unique	DisplayName Max64 chars Required	LastName Max32 chars	FirstName Max32 chars	Middle Name Max32 chars	Branch ID Max16 chars Required	Customer Flag 0=not customer 1=customer	Cashier Flag 0=not cashier 1=cashier	Clerk Flag 0=not clerk 1=clerk	Supplier Flag 0=not s upplier 1=s upplier	Customer Type Max 16 chars	Price Level ID Max16 chars	Address 1 Max120 chars
2	A001	John Smith	Smith	John		MAIN	1	0	0	0	REGULAR	REGULAR	7F Pioneer Building
3	A002	Annika Henderso	Henderson	Annika		MAIN	1	0	0	0	REGULAR	REGULAR	888 Maxilom Avenue
4	C001	Cashier				MAIN	0	1	0	0			
5	C002	Steve				MAIN	0	0	1	0			
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Account Master

## Upload Master Data

Type:	<input type="text" value="Generic Name Master"/>	<input type="button" value="Download Template"/>
Write Mode:	<input type="text" value="Skip Existing Records (Do not overwrite)"/>	
Upload Status:	<input type="text" value="Skip Existing Records (Do not overwrite)"/> <input type="text" value="Replace Existing Records"/> <input type="text" value="Delete all existing records and apply new data"/>	

For Write Mode, you may choose from the following:

### **Skip Existing Records**

- new data will be added without deleting similar items

### **Replace Existing Records**

- new data will replace similar items

### **Delete all existing records and apply new data**

- start from scratch

Once you have finished choosing Data Type and Write Mode, click on Download Template. The Excel file will automatically download to your computer.

Open the file and fill up the fields. Save the file in your local disk.

Once done, click on Upload Data.

The screenshot shows a web interface for data upload. It features two dropdown menus: 'Type' set to 'Generic Name Master' and 'Write Mode' set to 'Skip Existing Records (Do not overwrite)'. To the right of the 'Type' dropdown is a 'Download Template' button, which is circled in red. Below these is an 'Upload Status:' section containing three buttons: 'Upload Data' (circled in red), 'Cancel Upload', and 'View Logs'.

For errors in uploading, it will be displayed in the View Logs section. Documents that still contain error/s will not be uploaded to the system.

Maximum Allowable file Size : 98KB (Excel File)

Maximum Allowable Record Lines : 10,000 items