Considerations When Importing QuickBooks POS data into RetailEdge

Blog · https://retailedge.com/docs/considerations-when-importing-quickbooks-pos-data-into-retailedge

The video on importing inventory can be found here and the import templates can be found here.

If you are importing QB POS files there are a number of things you will want to consider.

Using Existing QuickBooks POS labels

If you are using existing QuickBooks POS labels, you will want to preserve the barcode value so that the barcode labels can continue to be scanned in RetailEdge. The QB POS export has an Item Number field. This is typically a number with between 4 and 6 digits. The QuickBooks POS barcodes use the Item Number field value but it must be 6 digits, so if this number has only 4 digits you need to prepend the value with 0s. For instance, if the Item Number field is 1234, you need to convert this to a value 001234, before you import it. To get this Item Number into RetailEdge, you need to use the REDI file format and put the Item Number into RetailEdge's ItemID field.

Using UPC values coming from QBPOS

If you are manipulating the QuickBooks POS export file in Excel, you need to be very careful with the UPC Field. Excel will take a UPC value like (052931708401) with 12 characters and strip out the leading 0s. Sometimes it will also convert these numbers to scientific notation (e.g., 6.88478E+11). The video on importing inventory talks about how to import these files to makes sure this does not happen.

Attributes and Size Information

The QuickBooks POS export file has five fields that you might want to consider moving into your RetailEdge description field (i.e., Item Name, Item Description, Brief Description, Attribute, Size). If you want to bring these into the RetailEdge description field, you will need to create a new column

and use Excel’s Concatenate function to create a consolidated description.

Vendors and Departments

The QuickBooks POS export file does not always populate Vendor or Department fields. RetailEdge requires these fields to create an inventory item. A simple solution would be to just create a Vendor ID with a name like No_Vendor so that once in RetailEdge you can filter on this value and assign the proper vendor to the items.

In addition, we have found that many QuickBooks users, have a lot of vendors in the file that are not used in the retail operations (i.e., landlord) that were pushed over from the accounting program. You might want to clear these out of the list before you import vendors.

Matrixed (Size Run/Variant) Items

Although you can create matrixed (size run) items in the REDI file, it is probably not worth the time and effort to convert these, and you should just import the items as separate values. RetailEdge does support three dimensions matrix items (i.e., waist, inseam, color) and you can retroactively apply items to matrixes (variants) after they are in RetailEdge. But we do not recommend you do this for existing items, and only do it for new items created in RetailEdge going forward.

Stock Number naming convention.

RetailEdge Requires a Stock Number field that does not exist in the QuickBooks Export file. You should create a new column in your import file for Stock Number, copy the Item Number over to this field, pre-pending it with some value like QB-

Sales Tax Values

The QB POS file will have a Taxable field that is set as Tax or Non. This needs to be changed to True or False to be imported into RetailEdge.

Importing Customers

If you are importing customers, RetailEdge does require that each customer have a CustomerID. QB POS customers do not have a customer ID. You could use something like First Name concatenated

with Last Name or Company. There is sometimes a Loyalty field that can also be used for this CustomerID as well.