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# Transfers –Quick Start

Guide 1.0 Importing data into the VZ-VMS Cloud

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## What is Transfers

You may be transitioning from a different software system or you may have data in spreadsheets or other areas and locations and you don't want to enter in all of the information again.

So to help get your data from one place and into your cloud you can use the Transfers application to get a head start. It may not pull in all of the information you have but it will allow you to pull in your basic information and then you can build from there.

The Transfers application will allow you to import Machine Information, Product names, and Location Information into your cloud software.

It will require you to get the information that you want to import into a .CSV format. The most basic and easiest type of file for anyone to use is a .CSV file (comma separated values). This is basically just a text document with comma's separating the values. So you just need to get the information that you want to import into a .csv file format and make sure the values are in the right order and you can use the Import options in the Transfer app to pull that data up into the cloud.



## Working with .CSV files

To get your data into a .CSV file you could use something as simple as the notepad application that comes with windows. But an easier way to work with that data is to use a spreadsheet like Microsoft Excel or Google Sheets in the google apps (free). These programs let you work with columns of data so you can see where the data is, move it around easily to get it into the right order and when it looks good in the spread sheet Excel or Google Sheets can then save the data into a .csv file for you. Usually using the 'Save As' option built into the tool.

### Example of a Machine CSV File

For example to import a list of machines you need to get your machine information into a .csv file. The basic machine info that Transfers can import and the order it expects that info in is...

Machine Name – What you call your machine – up to 50 characters

Serial Number – Serial number of your machine – up to 70 characters

eDevice Id – Serial number of the card reader if you have one – up to 35 characters

Purchase Date – Date you purchased your machine – must be a valid date

Purchase Price – How much you paid – must be a valid decimal

Purchase Place – Who or where you bought it – up to 50 characters

If you don't have all of this information for each machine then you just leave the spot that the data would be in empty in the .csv file. For example this is what a .csv file that Transfers could use would look like for importing 4 different machines. Each machine is on its own line and the machine data is in the order specified above separated by commas.

```
Metal Mart 1,ER123212-345322C,EE1200160 ,2/5/2013,9860,Brad  
TVCR,,EE1200191,2/5/2013,9860,  
SnackMaster 2000,,G81200265,,  
HY900-1234,,,,,Todd
```

And we could simply name the file 'machines.csv'. As was stated before, if you don't have all of the information for each machine then you just leave the spot that the data would be in empty.

In the first row we see a machine named Metal Mart 1 it has a serial number, eDevice Id, purchase date, price, and purchase place information. In the second row the machine is TVCR but no serial number and no purchase place on the end, so those are empty. In the third row the machine is SnackMaster2000 with no serial number, purchase date, price, or purchase place data. The last row is Machine HY900-1234 with only the purchase Place (in this case a who).

This is an example of what some machine data we might want to import would look like using

	A	B	C	D	E	F	G
1	Metal Mart 1	ER123212-345322C	EE1200160	2/5/2013	9860	Brad	
2	TVCR		EE1200191	2/5/2013	9860		
3	SnackMaster 2000		G81200265				
4	HY900-1234					Todd	
5	AirForce One	S123456789-BCD-321	EE1200564	2/5/2013	10450	Hillary	
6	Abbots Sports Lounge		EE1200056		9860		
7	RS900-3421		G8450850	1/11/2014	9860	1800vending	
8	HY900-5434		VJ1000203		9860		
9	Machine 1		VJ4000038	4/27/2015	9860		
10	Machine 2		VJ4000635	5/1/2015	9860	Seaga	
11	HY900		VJ1009214	7/22/2015	9860	HealthyYOU	
12	Machine 3		VJ5000031	1/27/2017	9860		
13	Machine 4		VJ5000033	1/27/2017	9860		
14							

Excel before we saved it to a .csv file. The first 4 records are the same as our example machines.csv file above. The columns are in the order that Transfers expects and each machine is on its own row or line and if we don't have info for that column, we just leave it blank. But looking at it in a spreadsheet format is much easier than just a simple text file.

So whatever form your data is currently in, the first step is to export that data, if you can, from your current system or get it into a spreadsheet program so you can put those pieces of data into the correct order and then use Excel or Google Sheets to save that data into a .CSV file for you that you can then import into Transfers which will do the work of putting it into your cloud for you so it will show up in your Lists.

So in summary a .csv file is just a basic text file where each row or line represents a single machine, product, location, etc, and each row has data in a certain order and that data is separated by commas (hence .csv - comma separated values). Transfers can then take the data in that file and import it into your cloud for you.

### Example of a Product CSV file

The Product .csv file only has one data element that it needs, the product name, which can be up to 45 characters, but it is recommend you try and keep your product names to 25 characters or less. This example would import 5 products. Each product is on its own line and it's just the product name.

**Hansens Natural Soda**  
**Cliff Bar Peanut**  
**Kind Bar Almond Cherry**  
**V8 Low Sodium**  
**PopChip BarBQ**

## Example of a Location CSV file

The Location .csv file uses these data elements in the following order:

Location Name – up to 75 characters  
Contact – Your contact person for that location up to 75 characters  
Address Line 1 – up to 50 characters  
Address Line 2 – up to 50 characters  
City – up to 50 characters  
State – up to 5 digits  
Zip – up to 15 digits  
County – up to 40 characters  
Primary Phone Number – up to 25 characters

The actual .csv file that we could name 'locations.csv' would look like this for 6 different locations.

```
Metal Mart, Josie, 16390 The Blvd., Denver, CO, 80212, Jefferson, 303-442-1460  
Caldwell Sands Worth Excavation, 315 S. 22nd Ave., Caldwell, UT, 84601, Washington, 801-454-1421  
Johnson Fames,,,,, UT, 80212,,  
Jet Hanger Service, Doug, 1900 Airport Rd., St George, UT, 84738,, 435-899-2183  
AirForce One,,,,,,,,,  
Basket Hoops Inc, 4500 W. 22nd Ave., Back Dock, St George, UT, 84601, Washington, 435-454-4356
```

The 1<sup>st</sup> row is the Metal Mart location and it has every data element except Address Line 2. The 5<sup>th</sup> row is a location called AirForce One and the only data it has is the Location Name. The last row is a location named Basket Hoops Inc and it has every single data element filled in

## The Import Process

Once you have your .CSV files with your information, in the order that Transfers expects for each one, you can now load them into the Transfers application. Clicking any of the Import buttons in the navigation panel of Transfers will open up an Import screen for that type of Info you want to import. For example, below is the import screen for importing machine information. This is the screen after we have used the Choose File button to choose which .csv file we want to load. When we choose a file and click open Transfers opens the .csv file we have picked and reads it into this screen so we can see how the data has loaded and edit it before it gets imported into the cloud.

**Choose File** – Use this button to tell Transfers which of your .csv files you want to load. This will open a dialog box so you can pick the file you want to load. Once the file is picked, Transfers will display the data from that file for you to review.

**Results Display** – where Transfers displays information about the loading and importing.

Choose your CSV File with your Machines to Import

Choose File machines.csv

Machines extracted from file 13. Blanks removed

	Name	Serial Number	eDevice ID	Purchase ...	Price	Purchase Place
<input type="checkbox"/>	Metal Mart 1	ER123212-345322C	EE1200160	2/5/2013	\$9,860.00	Brad
<input type="checkbox"/>	TVCR		EE1200191	2/5/2013	\$9,860.00	
<input type="checkbox"/>	SnackMaster 2000		G81200265			
<input type="checkbox"/>	HY900-1234					Todd
<input type="checkbox"/>	AirForce One	S123456789-BCD-321	EE1200564	2/5/2013	\$10,450.00	Hillary
<input type="checkbox"/>	Abbots Sports Lounge		EE1200056		\$9,860.00	
<input type="checkbox"/>	RS900-3421		G8450850	1/11/2014	\$9,860.00	1800vending
<input type="checkbox"/>	HY900-5434		VJ1000203		\$9,860.00	
<input type="checkbox"/>	Machine 1		VJ4000038	4/27/2015	\$9,860.00	
<input type="checkbox"/>	Machine 2		VJ4000635	5/1/2015	\$9,860.00	
<input type="checkbox"/>	HY900		VJ1009214	7/22/2015	\$9,860.00	HealthyYOU
<input type="checkbox"/>	Machine 3		VJ5000031	1/27/2017	\$9,860.00	
<input type="checkbox"/>	Machine 4		VJ5000033	1/27/2017	\$9,860.00	

Import Machines Clear Data

Data can be edited directly on the screen before Importing.

The data on the screen can be edited directly. You can also use the delete buttons to remove the rows you don't want to import. Doing any editing or deleting on the screen will not change your original .csv file.

**Import Machines** – Tells Transfers to import this data into the cloud where you will see it in your Machine List in Toucan.

**Clear Data** – Resets the screen and clears out all data or files.

When the import is complete, the screen will be reset and any results from the import will show in the Results Display

## Rules for Importing Machines

If a Machine Name is blank in the file, that record will be loaded from the file and displayed on the Import Machine screen. But if it is not corrected and given a name before the import button is clicked, it will be skipped and will not be imported into the cloud.

As machines are imported Transfers will check the eDevice Id of the machine being imported, if it is provided, and if a machine already exists with that same eDevice Id, that machine will be skipped and not imported.

## Rules for Importing Products

The only thing required for importing products is the product name. Therefore the .csv file for products can be just a list of product names with each product on a single line (see example for product.csv file above).

When the products are imported, if Transfers encounters the product name already existing in your Product List, it will skip that record and not load it a second time to help prevent duplicates.

Likewise, Transfers will also check your existing Product List and if it finds products that are not currently being used in a Machine or in a Machine Template, essentially an unused product in your list, it will remove that unused product from your list and replace all unused products with the list you are importing. So if you want to keep those products in your list, they must also be in the .csv file you are importing.

Remember, you can export your lists to excel from Toucan so you can export a list and use it as the starting point for the list you intend to import and paste or merge it with other lists of data.

## Rules for Importing Locations

Only a single location name will be imported so if you have the same location multiple times in a file with maybe a different phone number for each one, only the first of those records will be imported. The other rows for that location will be skipped. The phone number, if provided, on each record will become the Primary phone in Toucan. You can then go in after the import to your Location List and add any other phone numbers to that newly imported location.

Any blank Location Names on the Import Location Screen will be skipped if they are not filled in and corrected before the import button is clicked.

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Transfers is a web based application that is part of your Vending Zoo Cloud VMS. It is provided to give you an option to import your data electronically if you prefer. This is great when you have lots of records to import, but it is not required. Transfers is not doing anything special to the data, it's only a super fast 'typist' that can type what it sees in the file you give it.

- The Vending Zoo Team