



## Importing Sales Data into the Visual Proof 3 System

This guide will walk you through the steps to properly import sales data into the Visual Proof 2 system. Adding your sales data into the system will allow you to use many different analytical reports that will compare store sales and customer traffic as well as see which locations are over and underperforming.

If you have basic knowledge of using Microsoft Excel this should be a simple step by step process to follow. If you have not used Excel before it might be a task, you should get someone who does have Excel experience to perform. With that being said, we are always available at TraxSales to assist you in any issues you might have during this process, call 713-466-7177 or email [sales@traxsales.com](mailto:sales@traxsales.com).

### Step 1 - Download the Sale Data From Your Point of Sale System

The first step in this process is to download your sales data from your point of sale (POS) system in order to be able to upload it into the TraxSales system. The file needs to be in Excel or CSV.

### Step 2 - Decide on How you Want to import the Data

You have two choices when importing your data, you can do it by **store** or by **employees**. If you decide to import by employee, you will have the ability to see which members of your sales floor are over and underperforming. This will give you the information required to either offer more training or let some sales people go.



### Step 3 - Preparing the Data for Import

#### Sales Data by Location

If you are only uploading the sales data by location only then it should be formatted like the below.

The fields that are required are:

1. Date
2. Ticket Quantity - Number of Transactions in That Store for That Date
3. Sales - Total Sales Amount for That Store for That Date
4. Store ID - This Can Be found by Going into <https://etraxsales.com/> and logging in with your username and password. then you will go to the <Administration> tab on the main menu and click the 2nd choice which is <Showrooms>. The Store ID is the **Showroom Alias** on this page.
5. Employee ID - If you are pulling just store data this field is still required. Most clients set up the store manager as this employee for their locations or they can just call it "House". To Find or Add an employee to your location(s). This Can Be found by Going into <https://etraxsales.com/> then you will go to the <Administration> tab on the main menu and click the 9th choice which is <Employees>. You will then need to select the showroom and the Employee ID is the **Employee ID** on this page. If you do not have an employee on this page, select Add Employee and create one.

**A Sample of How the Data Should Look After Editing is Below**



Start Date	Ticket Qty	Sales	Store ID	Employee ID
9/4/2016	71	13,394.79	011	1
9/4/2016	55	7,402.35	012	1
9/4/2016	146	25,478.07	018	1
9/4/2016	138	22,963.77	019	1
9/5/2016	25	7,256.00	018	1
9/5/2016	26	7,356.00	019	1
9/5/2016	35	11,234.00	030	1
9/5/2016	27	9,032.00	031	1
9/5/2016	18	5,624.00	033	1

#### **Important Information Before Preparing Sales Data by Employee for Import**

One of the most important things to check before preparing the data for this type of import is to make sure that the **Employee ID** and **IFPOS ID** is the same as in your point of sale system. Each employee in your POS system will have a unique name. When setting up your employees you want to make sure that these match.

To Find or Add an employee to your location(s). Go into <https://etraxsales.com/> then go to the <Administration> tab on the main menu and click the 9th choice which is <Employees>.

The Employee ID that you have set up for your employees in your POS system should be the same as two fields in the TraxSales employee setup. These two fields are <Employee ID> and <IFPOS-Employee\_ID>.



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For Information contact TRAXSales @ 888-646-5462 or 713-466-7177

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**Employee Information for Relax The Back**

Showroom: Kirby 383D VP2 (8F17) 0

Refresh Add Employee Schedule

	Employee ID	Email	Last Name	First Name	Display Name	Password	Status	Upboard Status	Change User	Change Datetime	IFPOS Employee ID	Cell Number	Cellular Company
<a href="#">Edit</a> <a href="#">Delete</a>	01	erics@relaxtheback.net	Salazar	Eric	Eric	eric	A	D	ADMIN	7/21/2013 5:14:15 PM	01		0
<a href="#">Edit</a> <a href="#">Delete</a>	02	tiffanyd@relaxtheback.net	De La Roas	Tiffany	Tiffany	tiffany	A	F	ADMIN	7/21/2013 5:31:43 PM	02		0
<a href="#">Edit</a> <a href="#">Delete</a>	03	cindyc@relaxtheback.net	Cauthen	Cindy	Cindy	cindy	A	O	ADMIN	7/1/2013 11:48:19 AM	03		0
<a href="#">Edit</a> <a href="#">Delete</a>	04	davidf@relaxtheback.net	Fletcher	David	David	david	A	D	ADMIN	7/21/2013 2:42:08 PM	04		0

When Setting Up Employees in the TraxSales system in <https://etraxsales.com/>. You want to make sure that when you input the data the POS employee ID is the same as both the Employee ID and the IFPOS ID.

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**Employee Information for Relax The Back**

**Add New Employee**

Employee ID :	<input type="text"/>
Last Name :	<input type="text"/>
First Name :	<input type="text"/>
Display Name :	<input type="text"/>
Password :	<input type="text"/>
Status :	Active ▾
Upboard Status :	Off the Board ▾
IFPOS ID :	<input type="text"/>
Cell Number :	<input type="text"/>
Cellular Company :	0 ▾
Email :	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

### Step 3 (Continued) - Preparing the Data for Import

#### Sales Data by Employee & Location

If you are uploading the sales data by Employee, then it should be formatted like the below.

The field that are required are:

1. **Store ID** - This Can Be found by Going into <https://etraxsales.com/> and logging in with your username and password. Then you will go to the <Administration> tab on the main menu and click the 2nd choice which is <Showrooms>. The Store ID is the **Showroom Alias** on this page.



2. **Employee ID** – Employee ID from your POS, it should match the **employee ID** and **IFPOS ID**. This Can Be found by Going into <https://etraxsales.com/> then you will go to the <Administration> tab on the main menu and click the 9th choice which is <Employees>. You will then need to select the showroom and be sure the Employee ID from your POS matches the **Employee ID** and **IFPOS ID** on this page. If you do not have an employee on this page, select Add Employee and create one.
3. **Date** - Date of sale
4. **Sales Total** - This will be the specific employee’s sales total for that date
5. **# of Invoices** - This is the number of transactions that specific employee rung up that day

**A Sample of How the Data Should Look After Editing is Below**

STORE ID	EMPLOYEE ID	DATE	SALES TOTAL	# OF INVOICES
70	HannahP	9/12/2016	\$39.99	3
70	Connor	9/12/2016	\$420.58	8
4	bsanders	9/12/2016	\$49.00	2
71	JCAT	9/12/2016	\$13.49	1
71	Tommy	9/12/2016	\$631.01	14
71	MICHAELA	9/12/2016	\$1,463.00	25
100	russell	9/12/2016	\$476.13	9

**Step 4 - Mapping the Data**

This is the all-important step of the process that will allow the correct data to be imported to the right place. This can be found by going into <https://etraxsales.com/> and logging in with your username and password. Then you will go to the <Administration> tab on the main menu and 4th choice which is <RPG Import>, a drop-down menu will show and click <Upload Mapping>.

1. Choose the File to Load - click choose file
2. Click - Load Report Columns



3. Match Trax Columns with Report Columns From File click map>> - (Don't Map Opportunity EndDate Time or Showroom ID)
4. After Mapping is Complete Click the Save Button Next to <Mapped Columns>

After Mapping Your Page Should Look Something Like This

The screenshot shows a web-based interface for mapping columns. At the top, there's a header "Select file to Map" with a "Choose File" button and "No file chosen" text. Below this are "Load Report Columns" and "Clear selections" buttons. The main area is divided into three sections: "Trax columns" on the left, "Report Columns from file" in the middle, and "Mapped Columns" on the right. The "Trax columns" list includes "Showroom Id" and "Opportunity End Datetime". The "Report Columns from file" list is currently empty. The "Mapped Columns" list shows the following mappings: "Employee Id > Employee ID", "Opportunity Date/Start Datetime > DATE", "Doller Volume > Total Sales Amount", "Invoice Count > Number of Invoice", and "Showroom Alias > Showroom ID". There are "Save" and "Reset" buttons above the "Mapped Columns" list. In the center, between the "Trax" and "Report" columns, are "Map >>" and "<< UnMap" buttons.

### Step 5 - Importing the Data

Now it is time to upload your data. This Can Be found by Going into <https://etraxsales.com/> and logging in with your username and password. Then you will go to the <Administration> tab on the main menu and the 4th choice <RPG Import>, a drop-down menu will show and click <Import Now>.

1. Choose the File to Load
2. Click Preview
3. Scroll to the Bottom Under the Previewed Data and Click Import

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Now You are ready to use the incredible in depth sales reports.



Thank you again for your purchase and congratulations. Our goal is to absolutely help you increase sales and grow your company. I know this sounds like a tall order but I know we can do great things together if the system is setup properly and is automatically providing you the information you need to make better educated decisions regarding staffing and most importantly how to increase sales activity and grow your business.

Please do not hesitate to call if you have any questions or comments about anything dealing with the system.

TRAXsales Tech Support

713.466.7177

[Sales@Traxsales.com](mailto:Sales@Traxsales.com)