



*Aspect Software, Inc.*

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## **Exporting AccuBar<sup>®</sup> Data to Aspect**

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## Configuring the AccuBar® Account (one time setup)

If you purchased the Aspect export interface, your account is automatically enabled for exporting the proper format. We recommend that you set your account so your Auto-reports (the ones that are generated automatically when you send inventories) are set to produce Aspect format. Then, if you wish to generate Excel spreadsheets from AccuBar, simply use Reports-on-demand and specify Excel format.

### *To set your Auto-report formats*

1. Log in to your AccuBar account
2. Go to **My Account / Preferences**
3. Scroll down to the **Report Options** section
4. **Select the Custom interface option** ("Aspect Count Export" should already be displayed in the Interface Name field)
5. Scroll to the bottom of the page and **click Save Changes**

Report Options	
<b>Inventory</b>	<input type="radio"/> None
<b>Report</b>	<input type="radio"/> Excel spreadsheet delivered by email
<small>Detailed listing of all inventory items grouped by category</small>	<input type="radio"/> Fax
	<input checked="" type="radio"/> Custom interface
Interface Name:	Aspect Count Export
Server Address:	


Now that your preferences are set, you need to tell AccuBar about Aspect's item numbers, which is done on the Alternate IDs page. By setting the Aspect ID for each AccuBar item, the system is able to generate reports in Aspect's own language. **Note that in order to continue, you must have already taken your inventory in AccuBar and uploaded it to your AccuBar account.**

### *To set Alternate IDs for your items*

1. Log in to your AccuBar account
2. Go to **My Account / My Items / Set Alternate IDs**
3. Click the **[unassigned]** link. This displays a list of all items that need to have their alternate IDs set.
4. Go down the list and enter the Aspect item code for each product. You may want to click Save Changes occasionally just to be safe.

Once alternate IDs are set, you will need to re-generate the inventory so that it contains your new information.

### *To regenerate your inventory report*


1. Go to **Activities / Uploads**
2. Locate your inventory and scroll to the right
3. Click the  icon
4. On the confirmation page, click the Regenerate Report button




## Inventory Procedures

Once your account is set up, the end-of-period procedure is pretty simple. Following are the recommended steps:

### Internet customers

1. Take your inventory and send it to your AccuBar account
2. When you receive your email, open it. If no errors are listed, then simply save the attachment to your drive and import it into Aspect. You're done.
3. If, however, errors are listed, click the link in the email after **Go here to fix Alternate IDs** (note that it may force you to login after you click the link)
4. Fill in the missing alternate IDs, and then click Save Changes (note that on an ongoing basis, there will typically be very few items that need to be fixed).
5. Go to **Activities / Uploads**
6. Locate your inventory and scroll to the right
7. Click the  icon
8. On the confirmation page, click the Regenerate Report button. This time, the report should go through without errors.

### Unplugged customers

1. Take your inventory and send it to your AccuBar account
2. When your report has been generated, go to **Activities / Uploads**
3. If errors occurred, there will be an (errors) link next to your inventory. If not, you're done.
4. If errors are listed, click the (errors) link.
5. At the bottom of the page, click the **Click here to fix Alternate IDs** link
6. Fill in the missing alternate IDs, and then click Save Changes (note that on an ongoing basis, there will typically be very few items that need to be fixed).
7. Go to **Activities / Uploads**
8. Locate your inventory and scroll to the right
9. Click the  icon
10. On the confirmation page, click the Regenerate Report button. This time, the report should go through without errors.

### Error Log

Missing AltID for BV Coastal Cabernet  
Missing AltID for RH Phillips Cabernet  
Missing AltID for Cockburn's Special Reserve Porto  
Missing AltID for Concannon Petit Sirah Central Coast 01

[Click here to fix Alternate IDs](#)

Done



## Exporting counts for multiple locations

When you have taken inventory for all you locations, here's how to export the counts for all locations in a single file:

1. Log in to your AccuBar account
2. Go to **Activities / Reports on Demand**
3. Click the **Inventory Report** link
4. On the first page of the wizard, select the inventory with the earliest date that you wish to include in the export (ie: the one *lowest* in the list)
5. Click **Next**
6. Now click the inventory with the *latest* date (ie: the one *highest* in the list)
7. Click **Next**
8. Now select all location names that you wish to export. Note that you can hold down the **CTRL** key while clicking to select multiple locations
9. Click **Next**
10. On the confirmation page, make sure to select **Aspect Count Export** as the desired delivery format
11. Click **Finish**

Delivery:	Custom Interface	Aspect Count Export
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A file called **from\_accubar.csv** will be delivered to you in Aspect format.