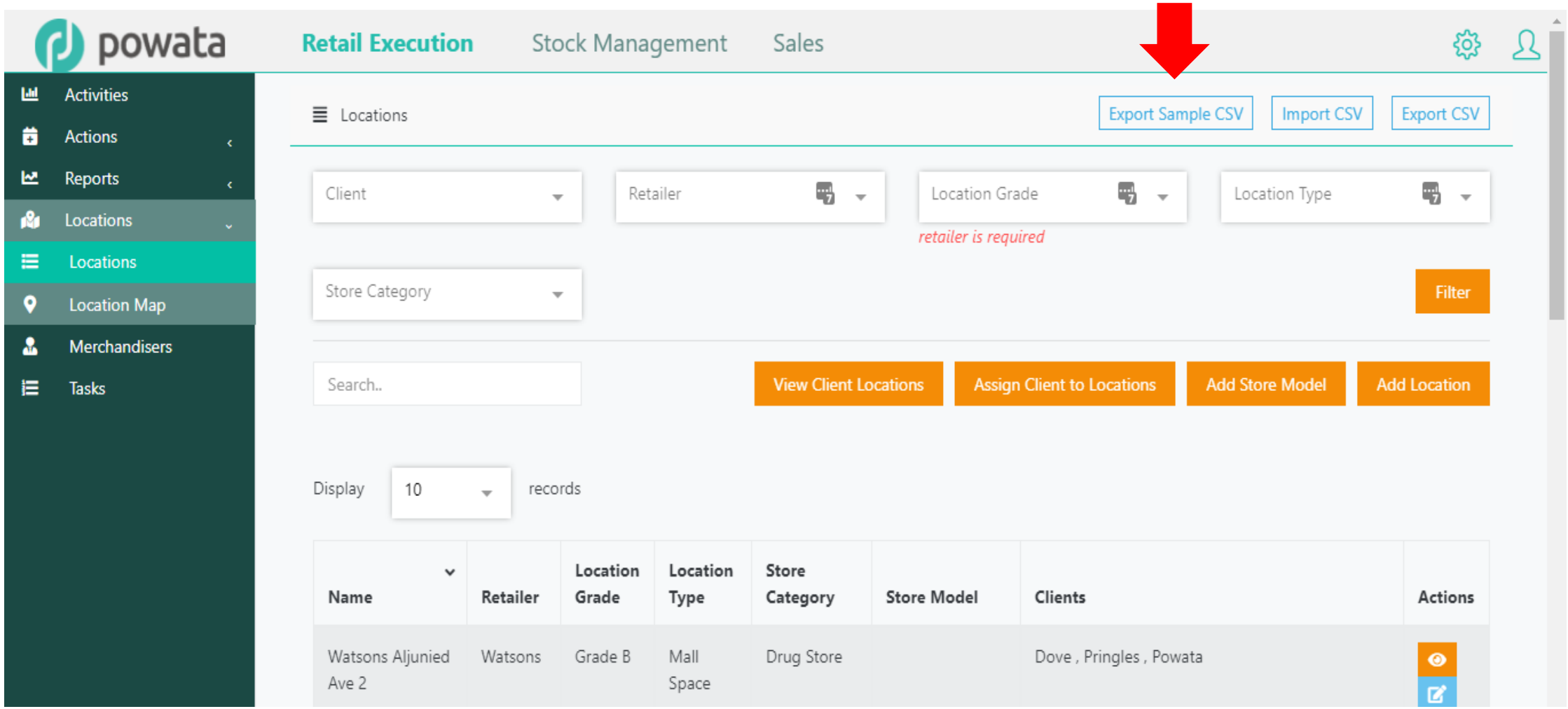
OptimMerchandising – How to Add Locations by CSV Import

1. Go to app.optimmerchandising.com and log in with the manager or supervisor credentials.
2. Download the locations template. Go to Retail Execution or Stock Management > Locations > Locations > Export Sample CSV



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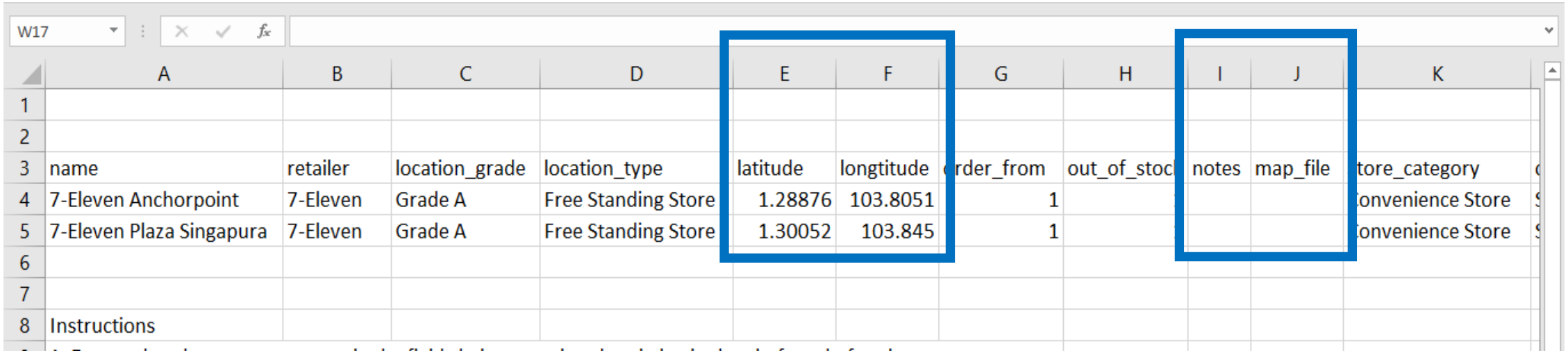
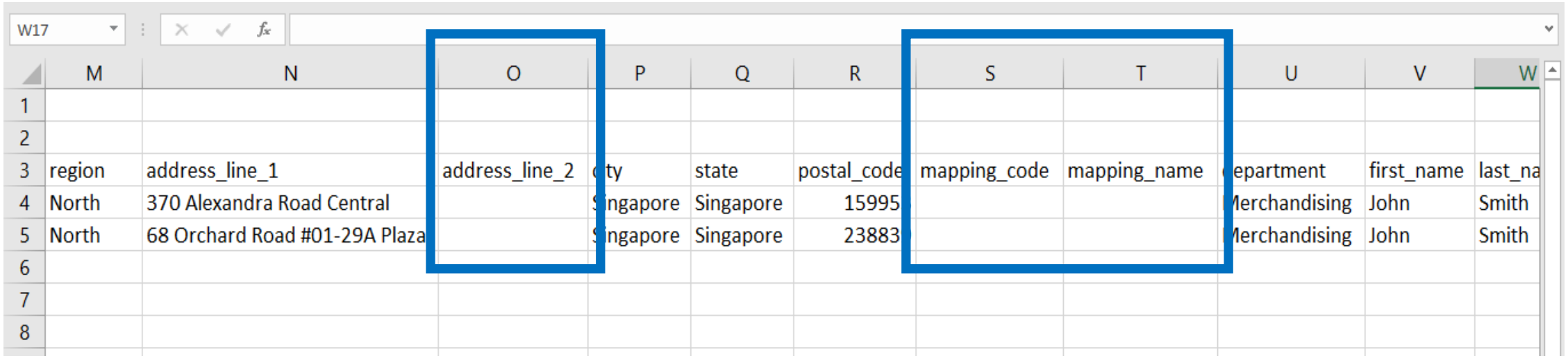
3. Open the template. Each row in the file represents 1 location. Some fields (see below in blue border) are not required and can be left empty.



	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	name	retailer	location_grade	location_type	latitude	longtitude	rder_from	out_of_stoc	notes	map_file	tore_category
4	7-Eleven Anchorpoint	7-Eleven	Grade A	Free Standing Store	1.28876	103.8051	1				onvenience Store
5	7-Eleven Plaza Singapura	7-Eleven	Grade A	Free Standing Store	1.30052	103.845	1				onvenience Store
6											
7											
8	Instructions										



	M	N	O	P	Q	R	S	T	U	V	W
1											
2											
3	region	address_line_1	address_line_2	ity	state	postal_code	mapping_code	mapping_name	epartment	first_name	last_na
4	North	370 Alexandra Road Central		ingapore	Singapore	15995			Merchandising	John	Smith
5	North	68 Orchard Road #01-29A Plaza		ingapore	Singapore	23883			Merchandising	John	Smith
6											
7											
8											

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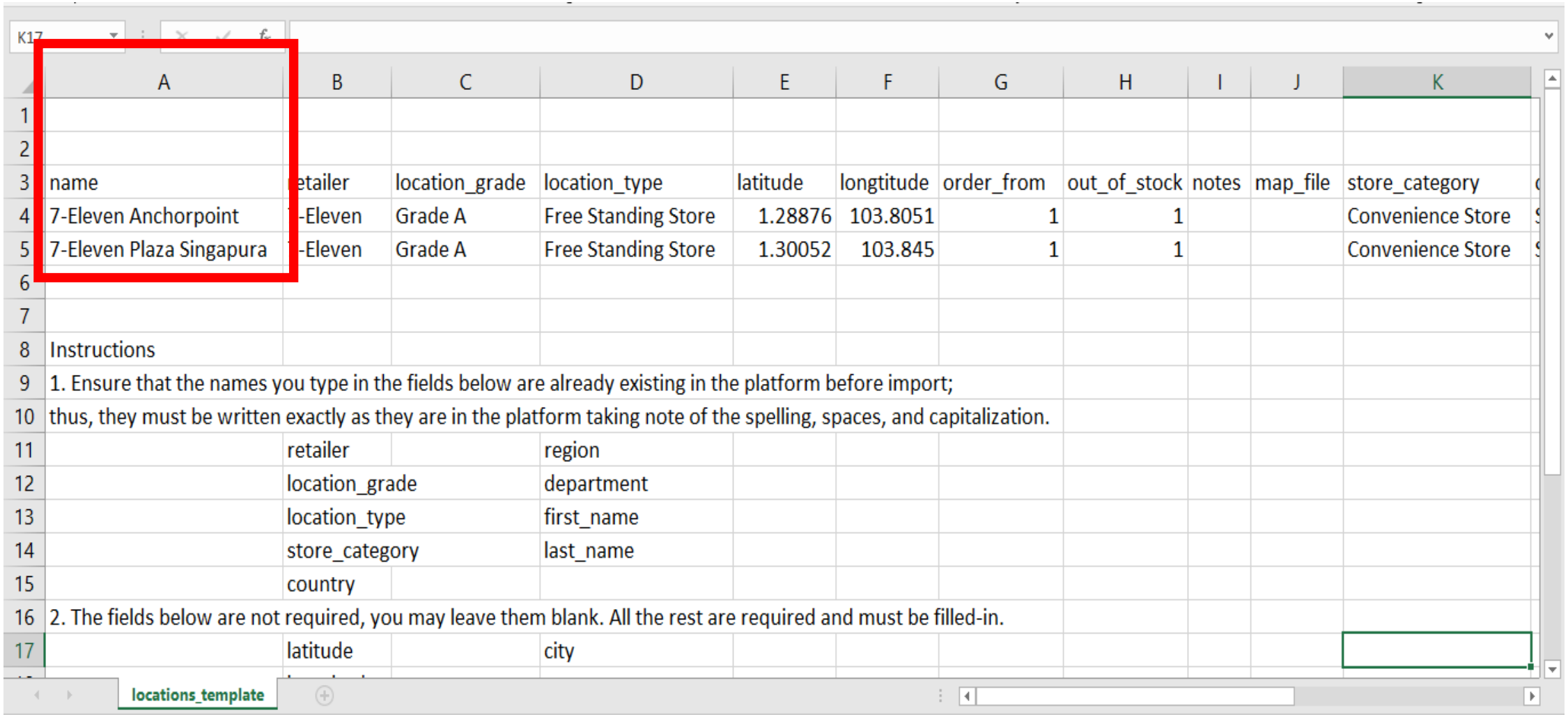
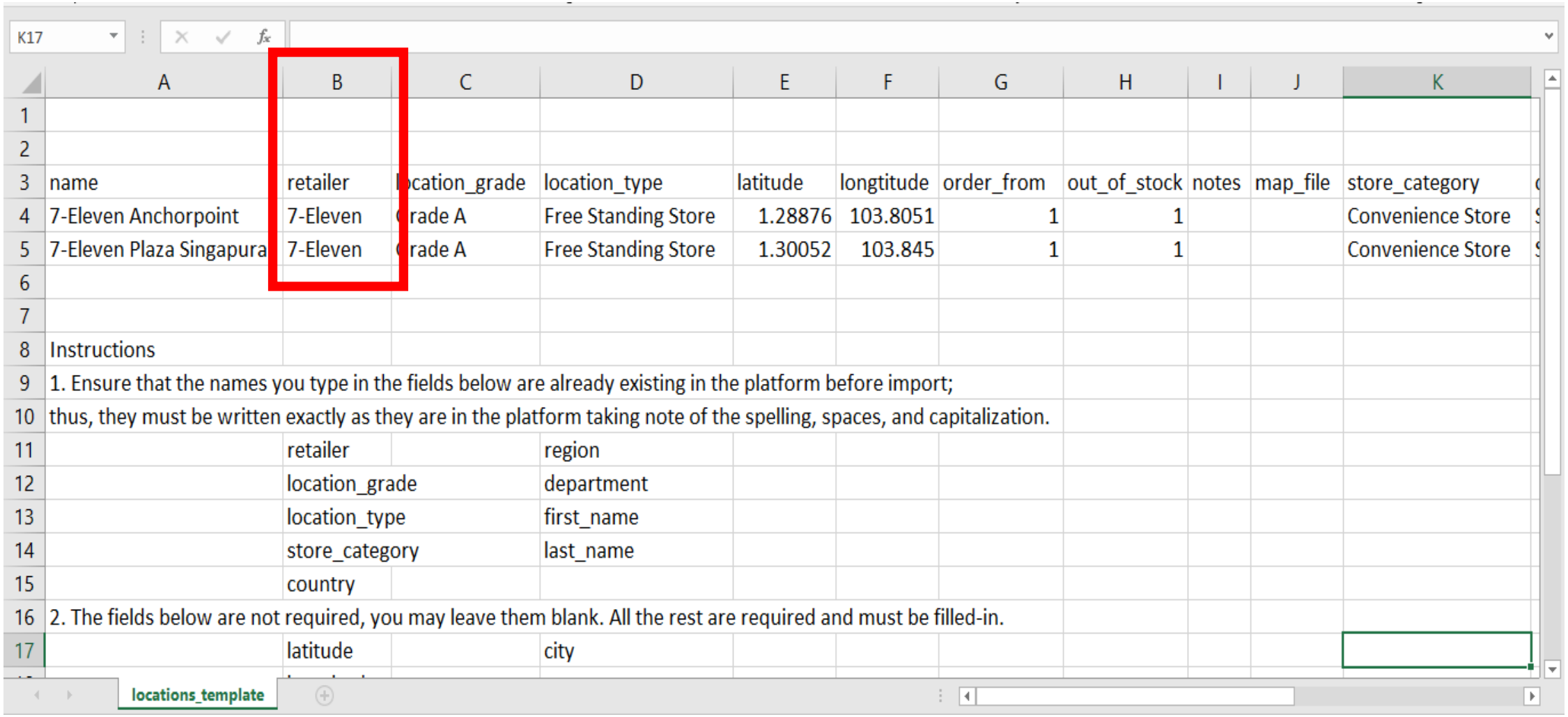
4. Under the “name” field (Column A), type the location name. You may type anything on this field; however, the number of characters cannot exceed 50.



	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	name	etailer	location_grade	location_type	latitude	longtitude	order_from	out_of_stock	notes	map_file	store_category
4	7-Eleven Anchorpoint	-Eleven	Grade A	Free Standing Store	1.28876	103.8051	1	1			Convenience Store
5	7-Eleven Plaza Singapura	-Eleven	Grade A	Free Standing Store	1.30052	103.845	1	1			Convenience Store
6											
7											
8	Instructions										
9	1. Ensure that the names you type in the fields below are already existing in the platform before import;										
10	thus, they must be written exactly as they are in the platform taking note of the spelling, spaces, and capitalization.										
11		retailer		region							
12		location_grade		department							
13		location_type		first_name							
14		store_category		last_name							
15		country									
16	2. The fields below are not required, you may leave them blank. All the rest are required and must be filled-in.										
17		latitude		city							

OptimMerchandising – How to Add Locations by CSV Import

5. Under the “retailer” field (Column B), type the name of retailer. Ensure that the retailer is already existing on the platform and must be typed exactly as it is taking note of the spelling, spaces and capitalization.



	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	name	retailer	location_grade	location_type	latitude	longtitude	order_from	out_of_stock	notes	map_file	store_category
4	7-Eleven Anchorpoint	7-Eleven	Grade A	Free Standing Store	1.28876	103.8051	1	1			Convenience Store
5	7-Eleven Plaza Singapura	7-Eleven	Grade A	Free Standing Store	1.30052	103.845	1	1			Convenience Store
6											
7											
8	Instructions										
9	1. Ensure that the names you type in the fields below are already existing in the platform before import;										
10	thus, they must be written exactly as they are in the platform taking note of the spelling, spaces, and capitalization.										
11		retailer		region							
12		location_grade		department							
13		location_type		first_name							
14		store_category		last_name							
15		country									
16	2. The fields below are not required, you may leave them blank. All the rest are required and must be filled-in.										
17		latitude		city							

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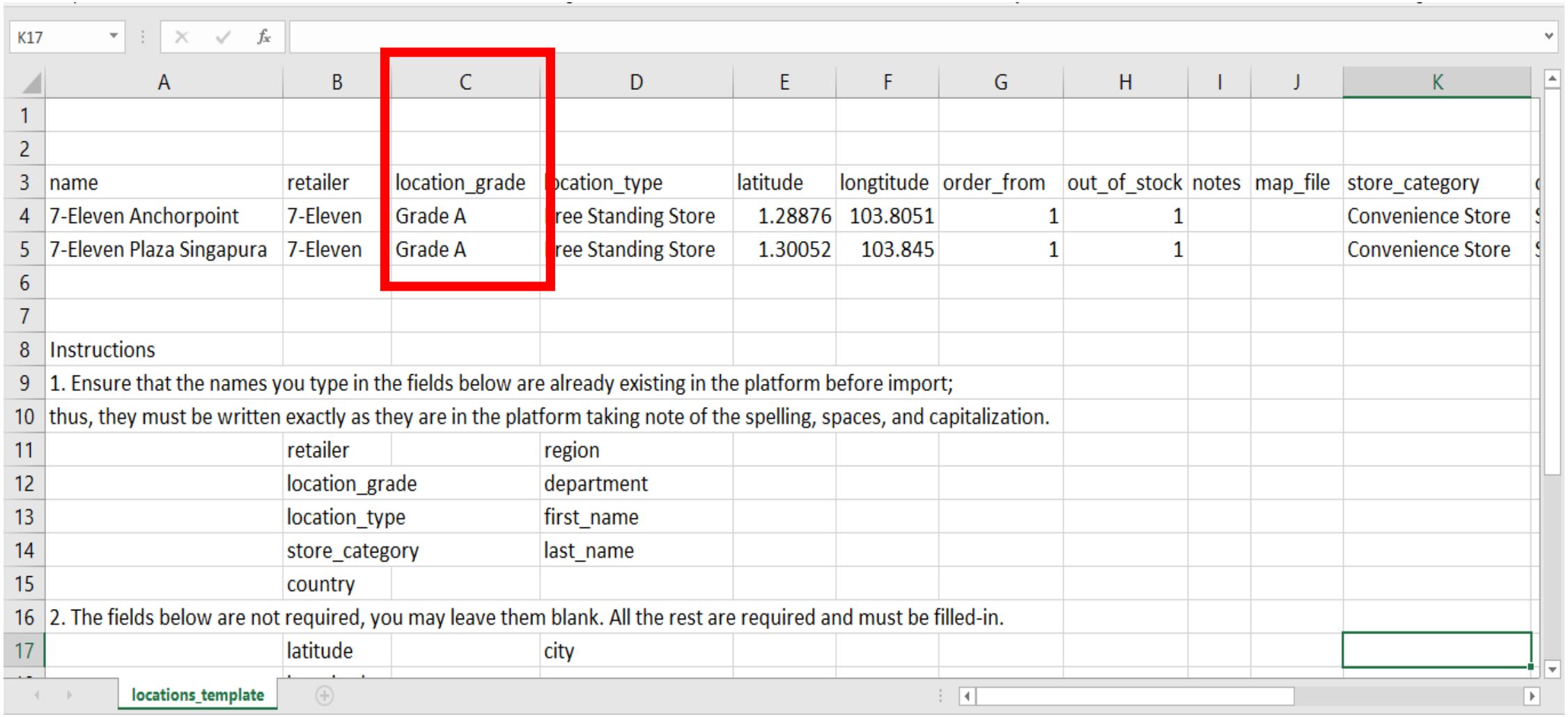
6. Under the “location_grade” field (Column C), type the location grade. Ensure that the location grade is already existing on the retailer page and must be typed exactly as it is taking note of the spelling, spaces and capitalization.



	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	name	retailer	location_grade	cation_type	latitude	longtitude	order_from	out_of_stock	notes	map_file	store_category
4	7-Eleven Anchorpoint	7-Eleven	Grade A	ree Standing Store	1.28876	103.8051	1	1			Convenience Store
5	7-Eleven Plaza Singapura	7-Eleven	Grade A	ree Standing Store	1.30052	103.845	1	1			Convenience Store
6											
7											
8	Instructions										
9	1. Ensure that the names you type in the fields below are already existing in the platform before import;										
10	thus, they must be written exactly as they are in the platform taking note of the spelling, spaces, and capitalization.										
11		retailer		region							
12		location_grade		department							
13		location_type		first_name							
14		store_category		last_name							
15		country									
16	2. The fields below are not required, you may leave them blank. All the rest are required and must be filled-in.										
17		latitude		city							

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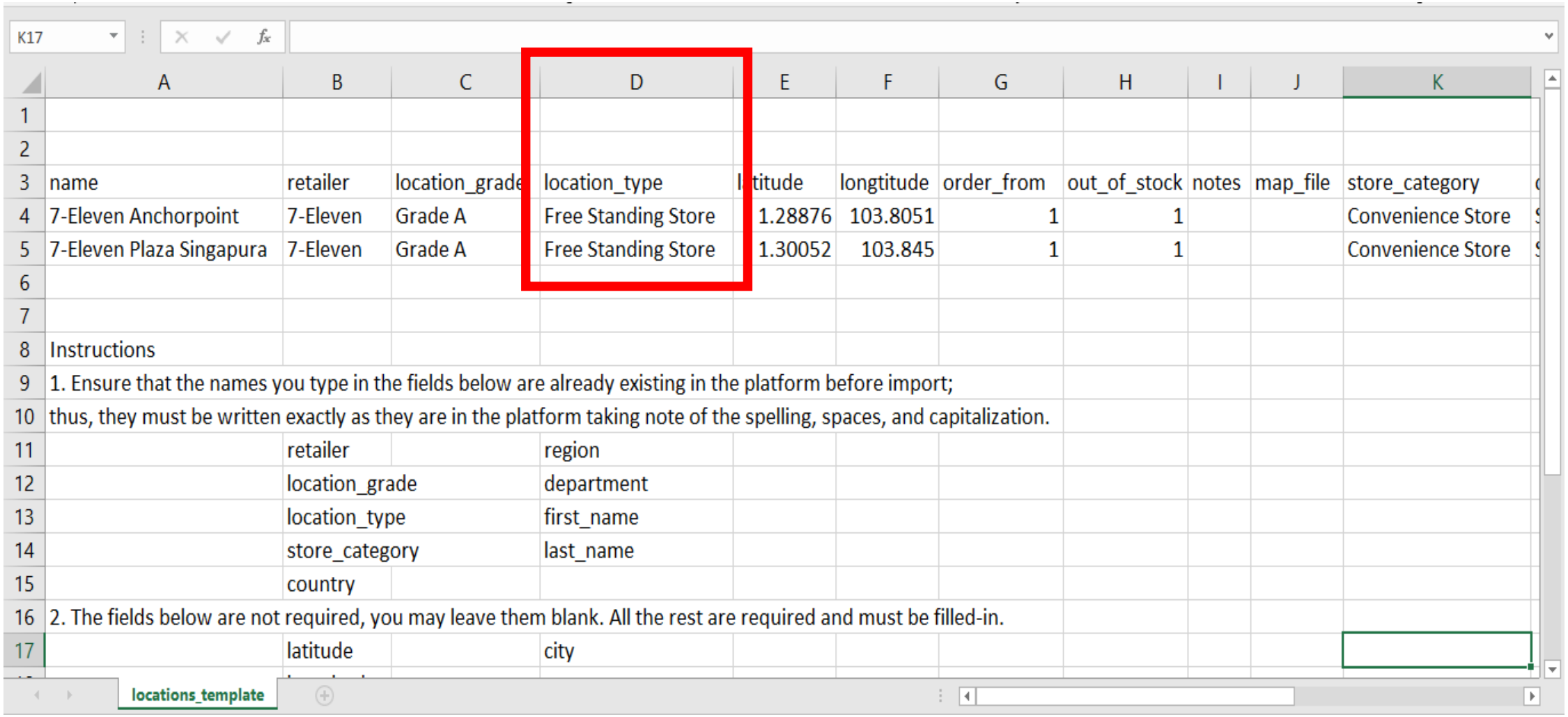
7. Under the “location_type” field (Column D), type the location type. Ensure that the location type is already existing on the platform and must be typed exactly as it is taking note of the spelling, spaces and capitalization.



	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	name	retailer	location_grade	location_type	latitude	longtitude	order_from	out_of_stock	notes	map_file	store_category
4	7-Eleven Anchorpoint	7-Eleven	Grade A	Free Standing Store	1.28876	103.8051	1	1			Convenience Store
5	7-Eleven Plaza Singapura	7-Eleven	Grade A	Free Standing Store	1.30052	103.845	1	1			Convenience Store
6											
7											
8	Instructions										
9	1. Ensure that the names you type in the fields below are already existing in the platform before import;										
10	thus, they must be written exactly as they are in the platform taking note of the spelling, spaces, and capitalization.										
11		retailer		region							
12		location_grade		department							
13		location_type		first_name							
14		store_category		last_name							
15		country									
16	2. The fields below are not required, you may leave them blank. All the rest are required and must be filled-in.										
17		latitude		city							

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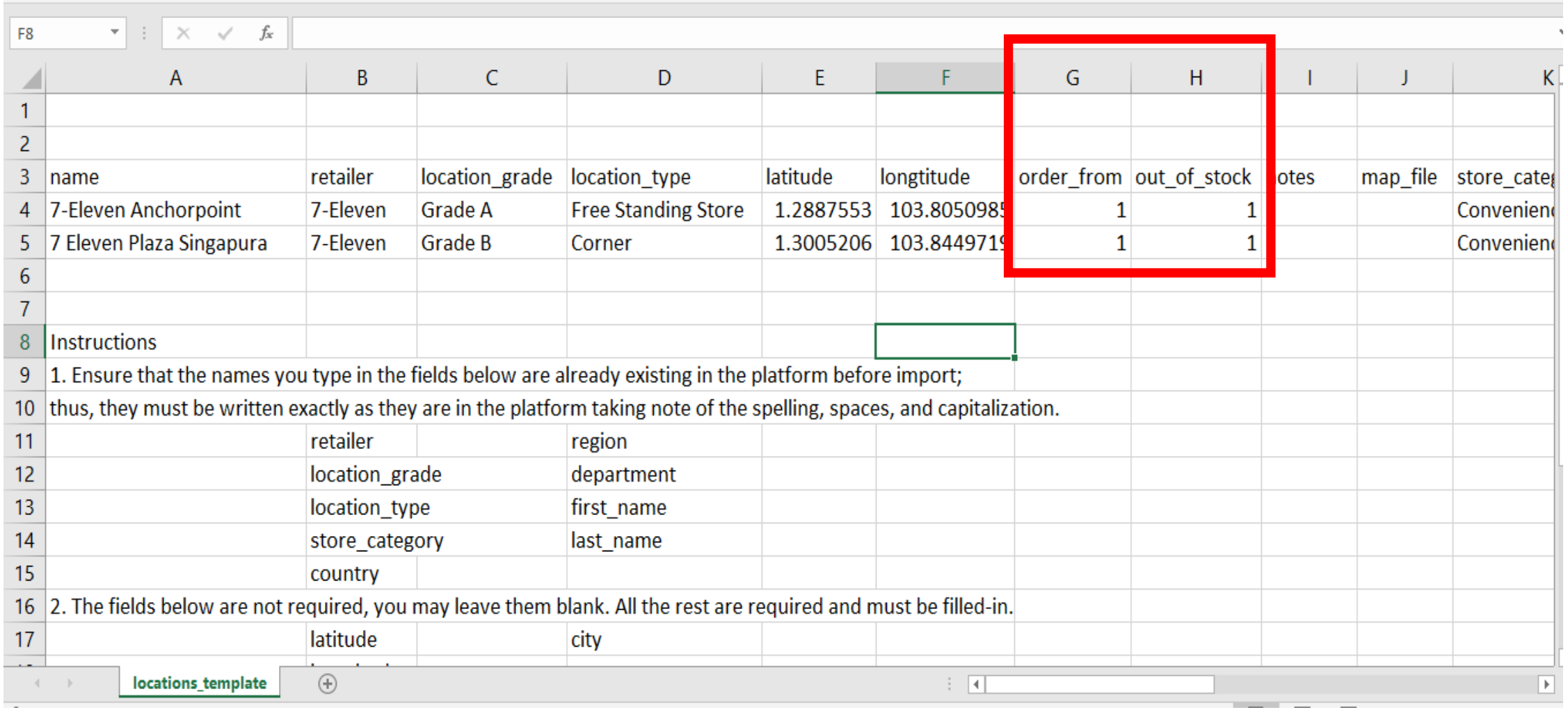
8. Under the “order_form” and “out_of_stock” fields (Column G and H), type “1” on both fields to enable the order form and out of stock reports for the location.



	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	name	retailer	location_grade	location_type	latitude	longtitude	order_from	out_of_stock	otes	map_file	store_cate
4	7-Eleven Anchorpoint	7-Eleven	Grade A	Free Standing Store	1.2887553	103.805098	1	1			Convenien
5	7 Eleven Plaza Singapura	7-Eleven	Grade B	Corner	1.3005206	103.844971	1	1			Convenien
6											
7											
8	Instructions										
9	1. Ensure that the names you type in the fields below are already existing in the platform before import;										
10	thus, they must be written exactly as they are in the platform taking note of the spelling, spaces, and capitalization.										
11		retailer		region							
12		location_grade		department							
13		location_type		first_name							
14		store_category		last_name							
15		country									
16	2. The fields below are not required, you may leave them blank. All the rest are required and must be filled-in.										
17		latitude		city							

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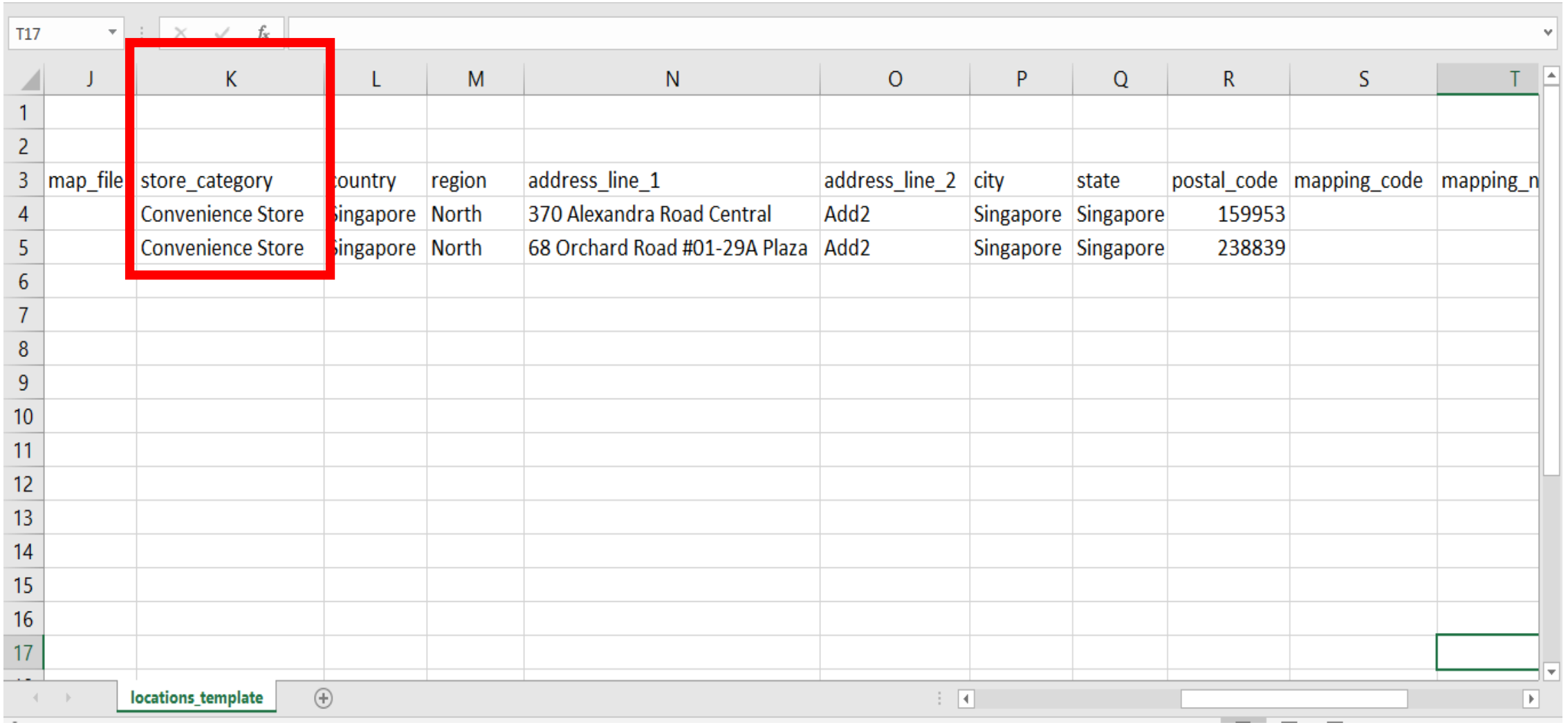
9. Under the “store_category” field (Column K), type the store category. Ensure that the store category is already existing on the platform and must be typed exactly as it is taking note of the spelling, spaces and capitalization.



	J	K	L	M	N	O	P	Q	R	S	T
1											
2											
3	map_file	store_category	country	region	address_line_1	address_line_2	city	state	postal_code	mapping_code	mapping_n
4		Convenience Store	Singapore	North	370 Alexandra Road Central	Add2	Singapore	Singapore	159953		
5		Convenience Store	Singapore	North	68 Orchard Road #01-29A Plaza	Add2	Singapore	Singapore	238839		
6											
7											
8											
9											
10											
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14											
15											
16											
17											

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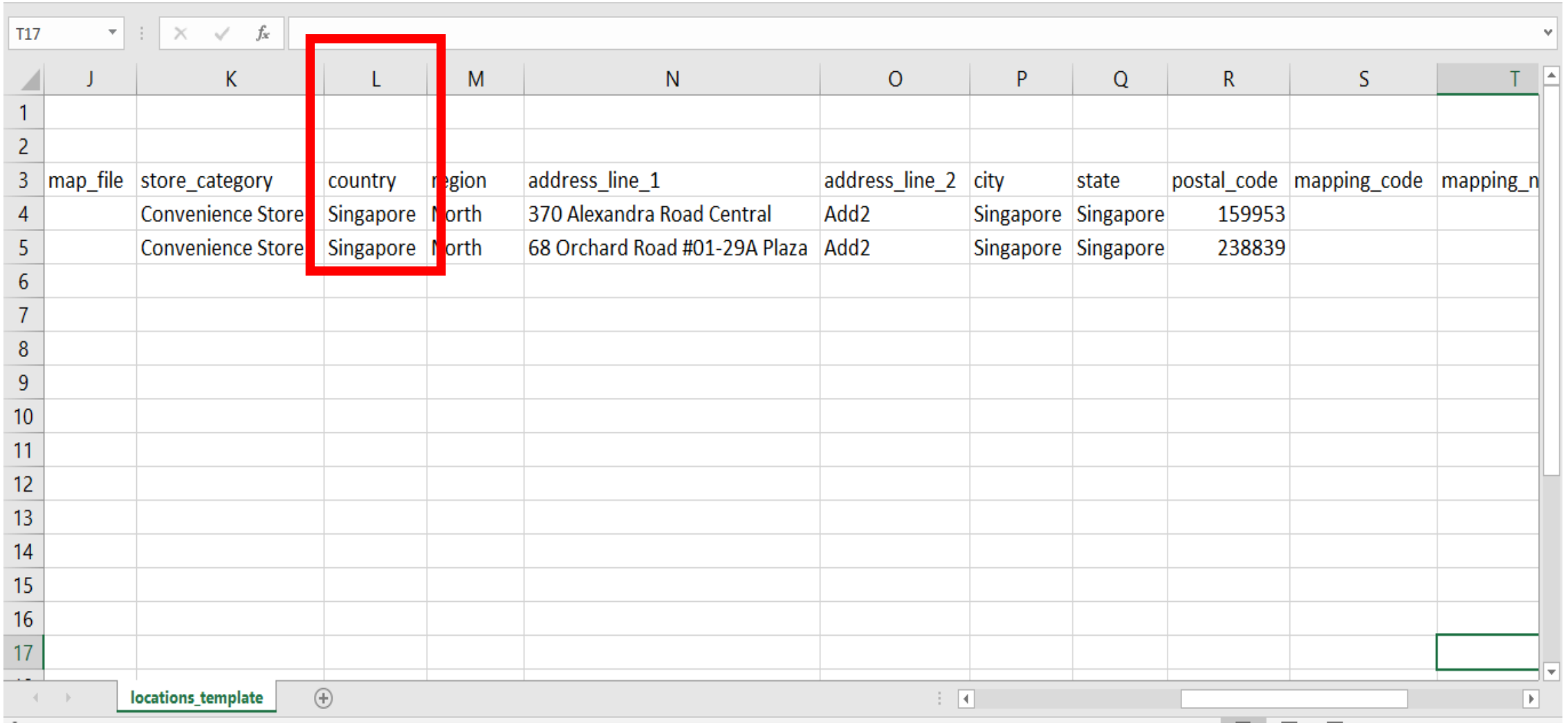
10. Under the “country” field (Column L), type the country the location is located in.



	J	K	L	M	N	O	P	Q	R	S	T
3	map_file	store_category	country	region	address_line_1	address_line_2	city	state	postal_code	mapping_code	mapping_n
4		Convenience Store	Singapore	North	370 Alexandra Road Central	Add2	Singapore	Singapore	159953		
5		Convenience Store	Singapore	North	68 Orchard Road #01-29A Plaza	Add2	Singapore	Singapore	238839		

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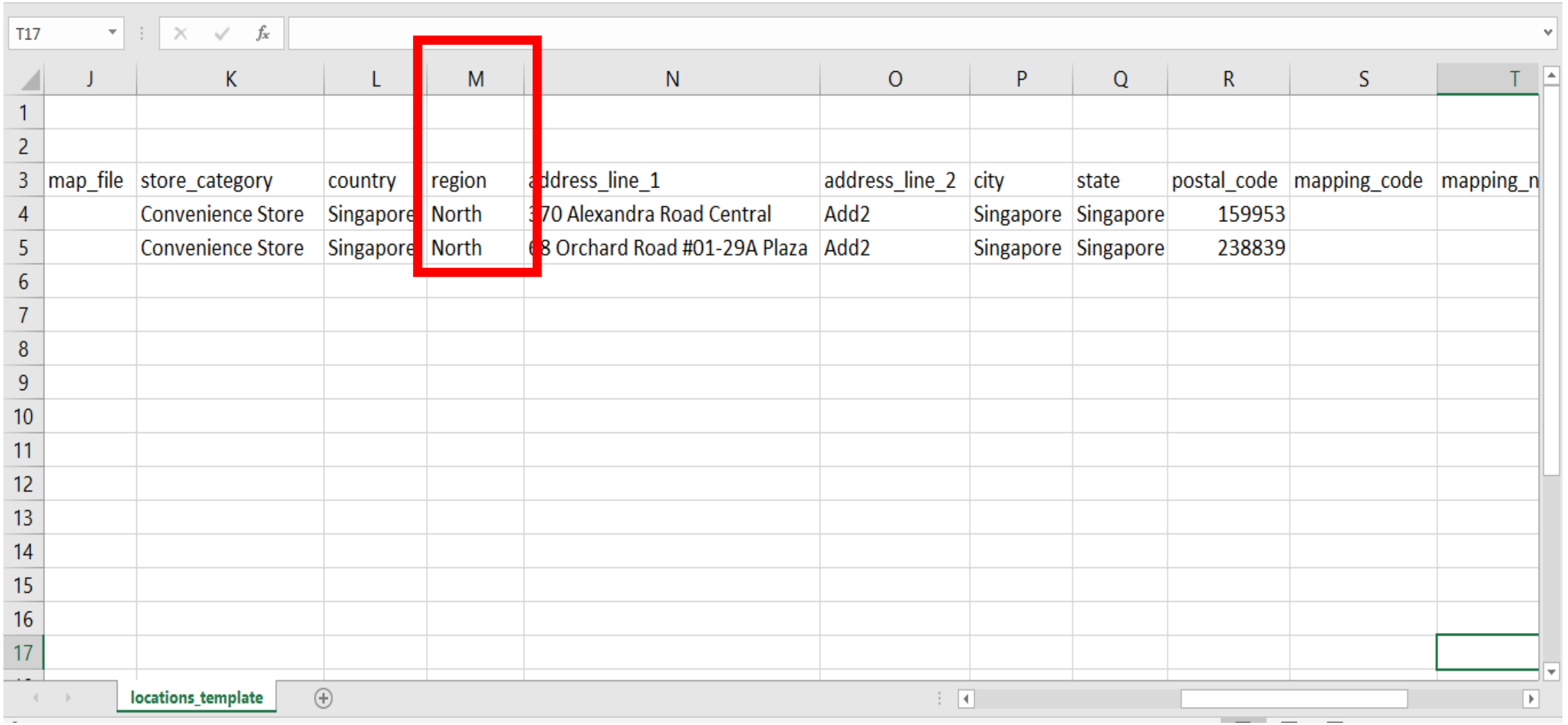
11. Under the “region” field (Column M), type the region the location is located in. Ensure that the region is already existing on the platform and must be typed exactly as it is taking note of the spelling, spaces and capitalization.



	J	K	L	M	N	O	P	Q	R	S	T
1											
2											
3	map_file	store_category	country	region	address_line_1	address_line_2	city	state	postal_code	mapping_code	mapping_n
4		Convenience Store	Singapore	North	370 Alexandra Road Central	Add2	Singapore	Singapore	159953		
5		Convenience Store	Singapore	North	68 Orchard Road #01-29A Plaza	Add2	Singapore	Singapore	238839		
6											
7											
8											
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15											
16											
17											

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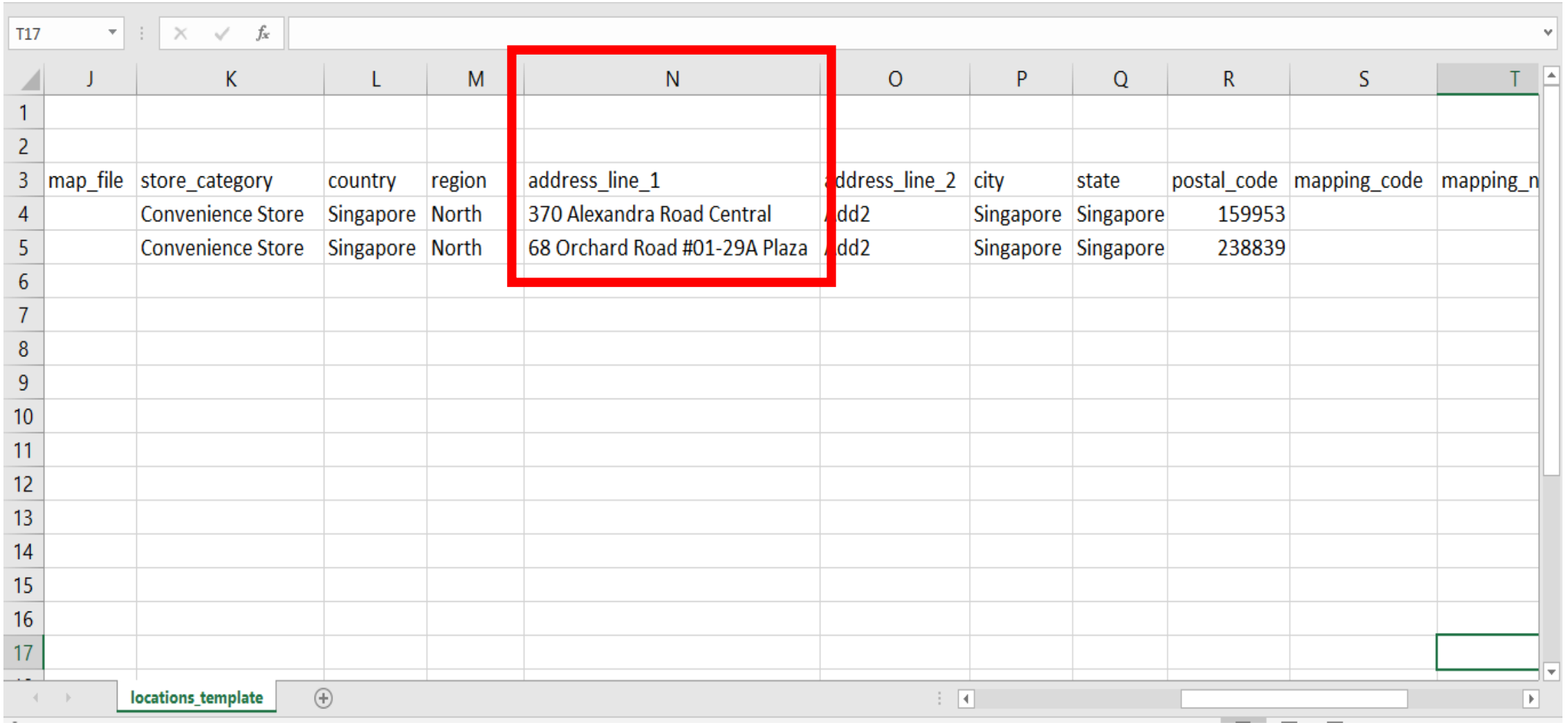
12. Under the “address_line_1” field (Column N), type the address of the location. To have a more accurate GPS coordinates from Google API, don’t include the city, state and postal code in here but put them in their respective fields.



	J	K	L	M	N	O	P	Q	R	S	T
1											
2											
3	map_file	store_category	country	region	address_line_1	address_line_2	city	state	postal_code	mapping_code	mapping_n
4		Convenience Store	Singapore	North	370 Alexandra Road Central	Add2	Singapore	Singapore	159953		
5		Convenience Store	Singapore	North	68 Orchard Road #01-29A Plaza	Add2	Singapore	Singapore	238839		
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											
16											
17											

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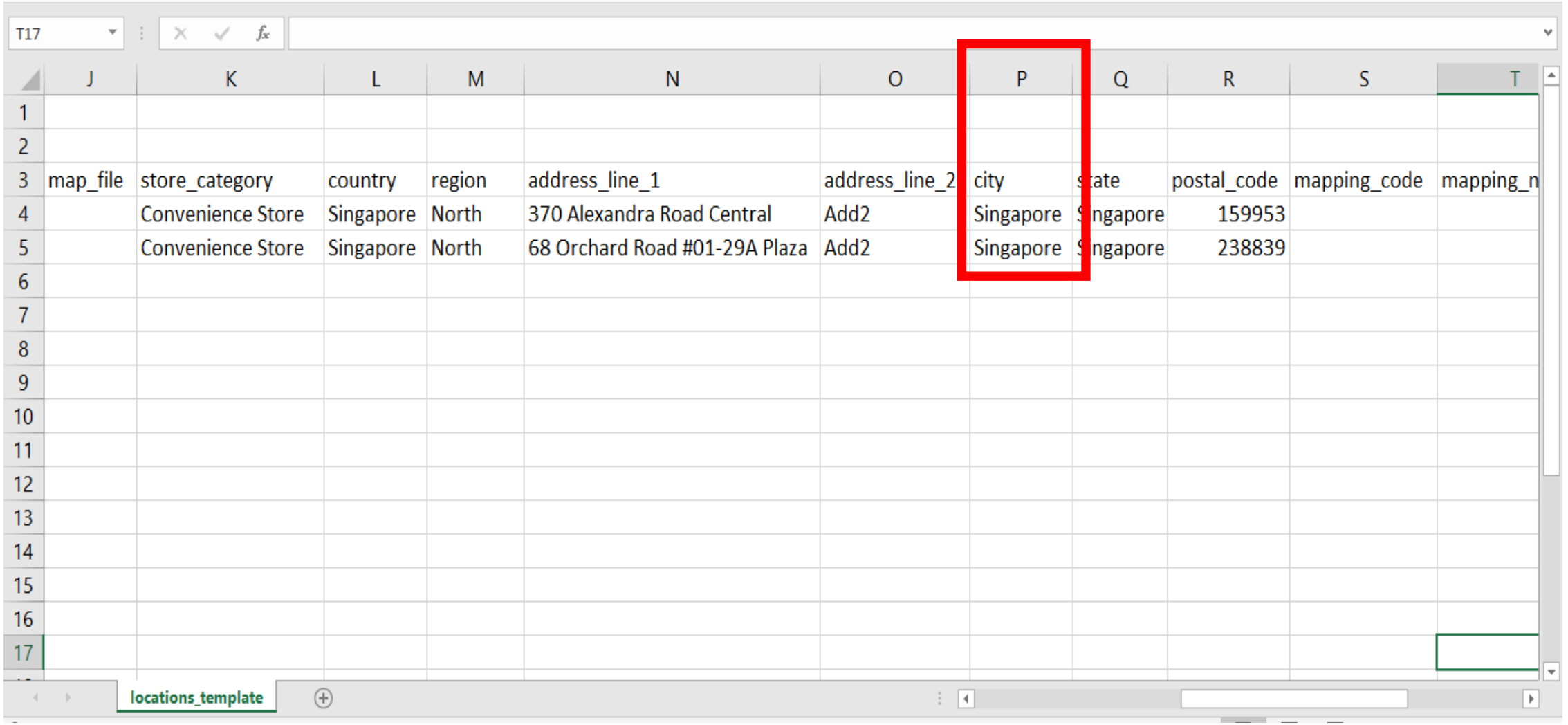
13. Under the “city” field (Column P), type the city the location is located in.



	J	K	L	M	N	O	P	Q	R	S	T
1											
2											
3	map_file	store_category	country	region	address_line_1	address_line_2	city	state	postal_code	mapping_code	mapping_n
4		Convenience Store	Singapore	North	370 Alexandra Road Central	Add2	Singapore	Singapore	159953		
5		Convenience Store	Singapore	North	68 Orchard Road #01-29A Plaza	Add2	Singapore	Singapore	238839		
6											
7											
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14											
15											
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17											

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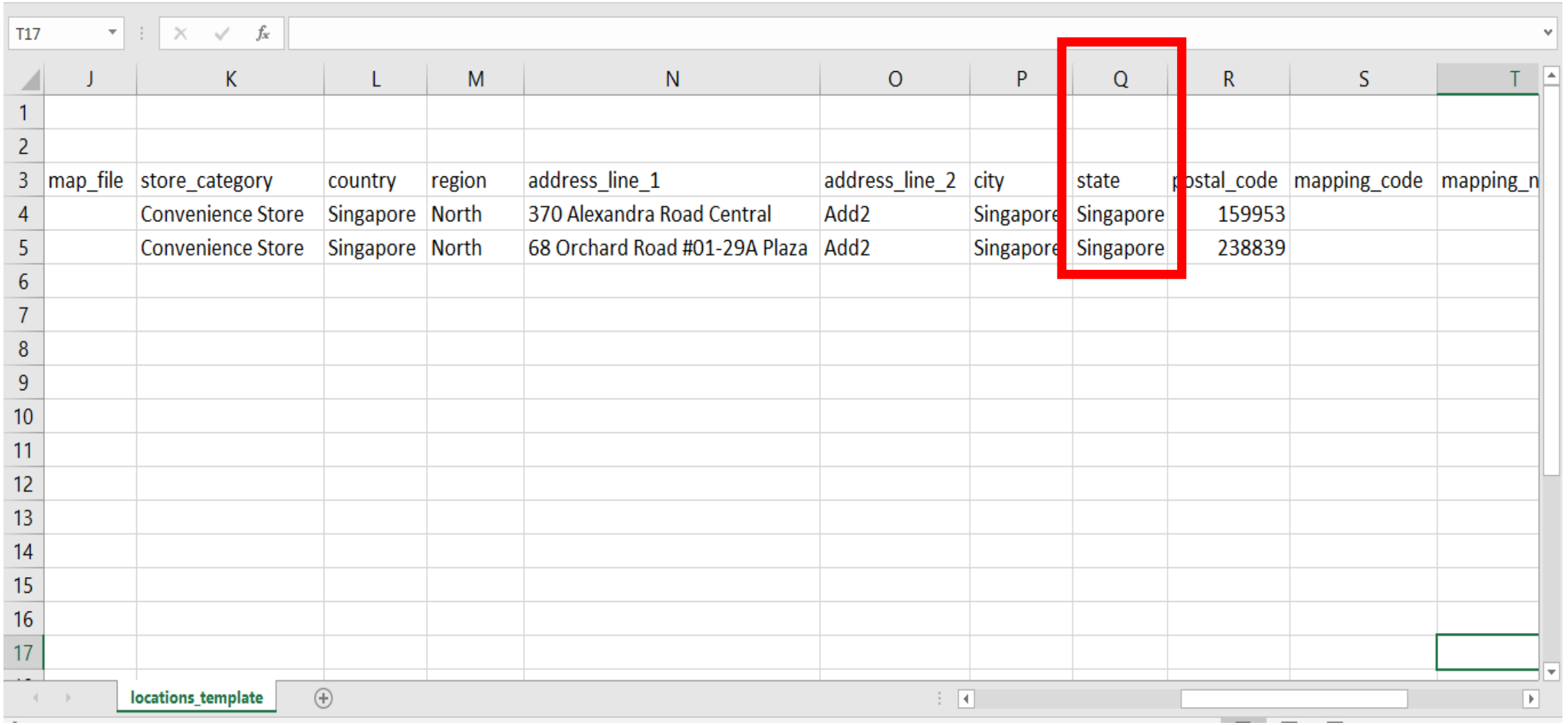
14. Under the “state” field (Column Q), type the state the location is located in.



	J	K	L	M	N	O	P	Q	R	S	T
1											
2											
3	map_file	store_category	country	region	address_line_1	address_line_2	city	state	postal_code	mapping_code	mapping_n
4		Convenience Store	Singapore	North	370 Alexandra Road Central	Add2	Singapore	Singapore	159953		
5		Convenience Store	Singapore	North	68 Orchard Road #01-29A Plaza	Add2	Singapore	Singapore	238839		
6											
7											
8											
9											
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11											
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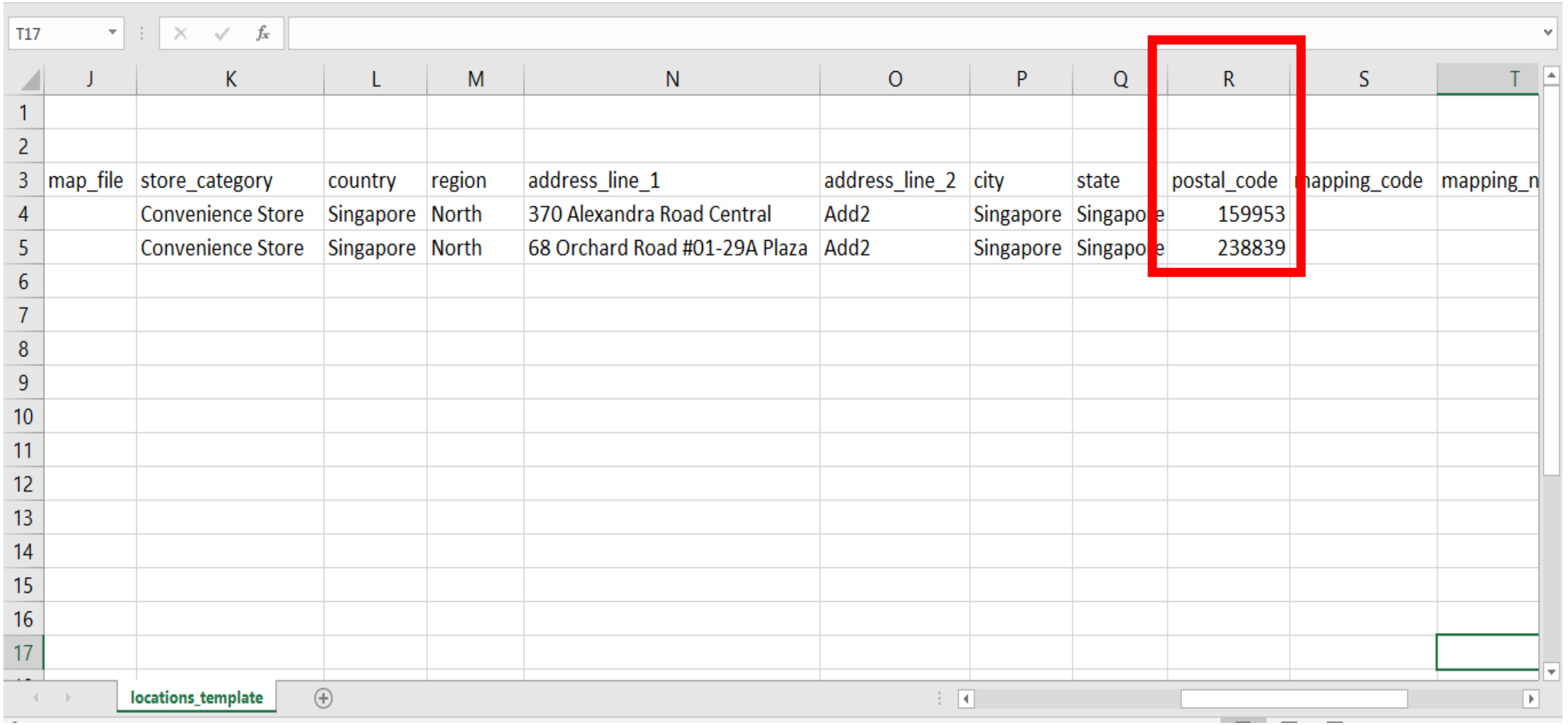
14											
15											
16											
17											

OptimMerchandising – How to Add Locations by CSV Import

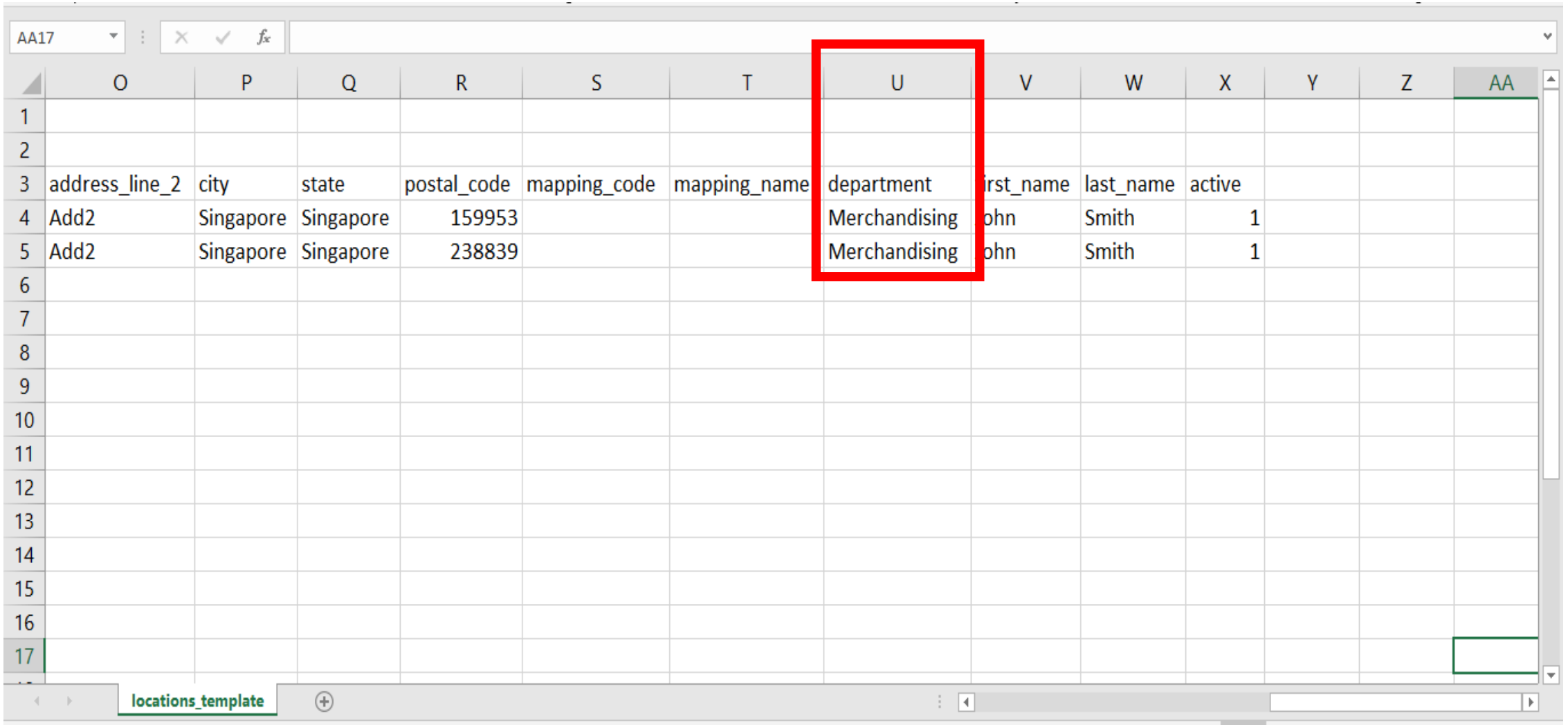
15. Under the “postal_code” field (Column R), type the postal code of the location.



	J	K	L	M	N	O	P	Q	R	S	T
1											
2											
3	map_file	store_category	country	region	address_line_1	address_line_2	city	state	postal_code	mapping_code	mapping_n
4		Convenience Store	Singapore	North	370 Alexandra Road Central	Add2	Singapore	Singapore	159953		
5		Convenience Store	Singapore	North	68 Orchard Road #01-29A Plaza	Add2	Singapore	Singapore	238839		
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											
16											
17											

OptimMerchandising – How to Add Locations by CSV Import

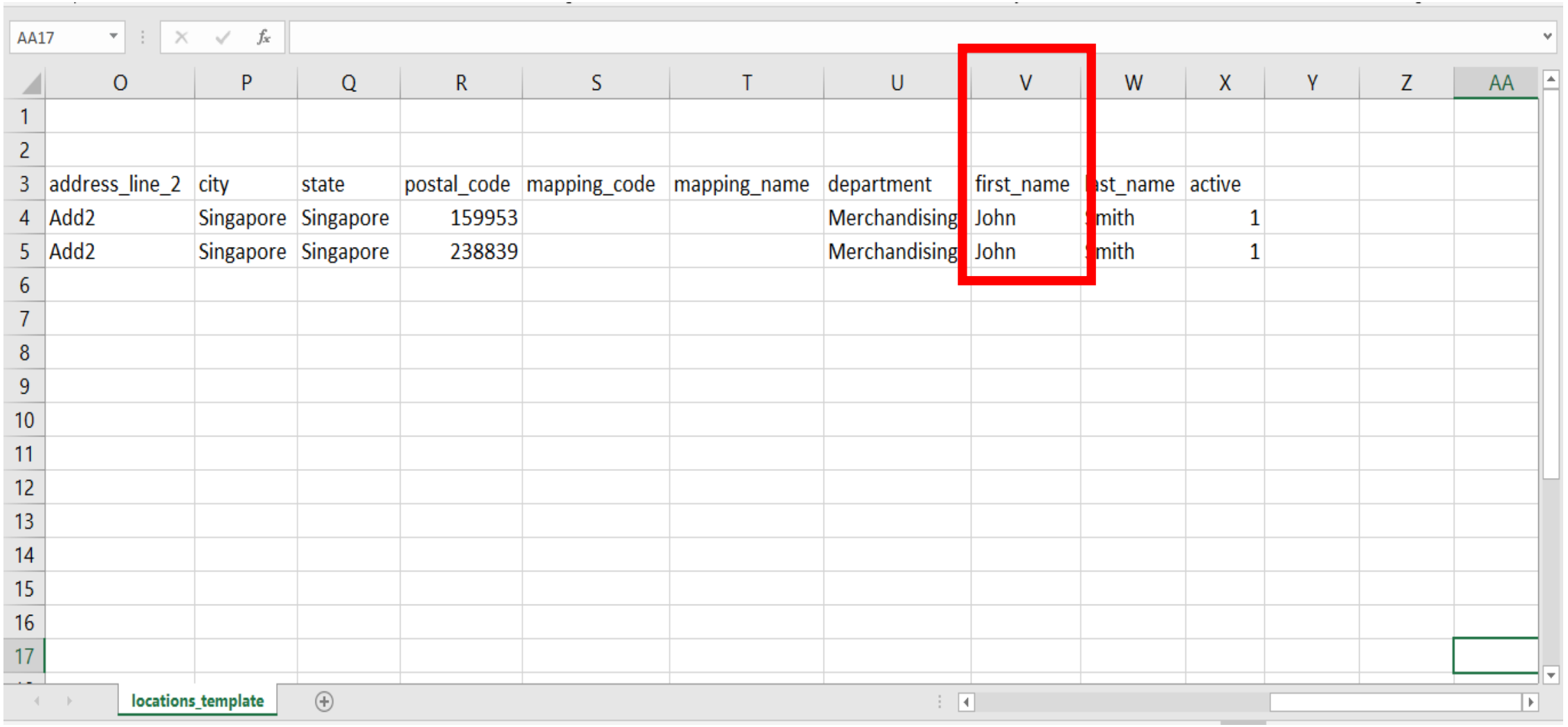
16. Under the “department” field (Column U), type the department of the assigned merchandiser to the location. Ensure that the department is already existing on the platform and must be typed exactly as it is taking note of the spelling, spaces and capitalization.



	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
1													
2													
3	address_line_2	city	state	postal_code	mapping_code	mapping_name	department	irst_name	last_name	active			
4	Add2	Singapore	Singapore	159953			Merchandising	ohn	Smith	1			
5	Add2	Singapore	Singapore	238839			Merchandising	ohn	Smith	1			
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													

OptimMerchandising – How to Add Locations by CSV Import

17. Under the “first_name” field (Column V), type the first name of the assigned merchandiser to the location. Ensure that the merchandiser name is already existing on the platform and must be typed exactly as it is taking note of the spelling, spaces and capitalization.



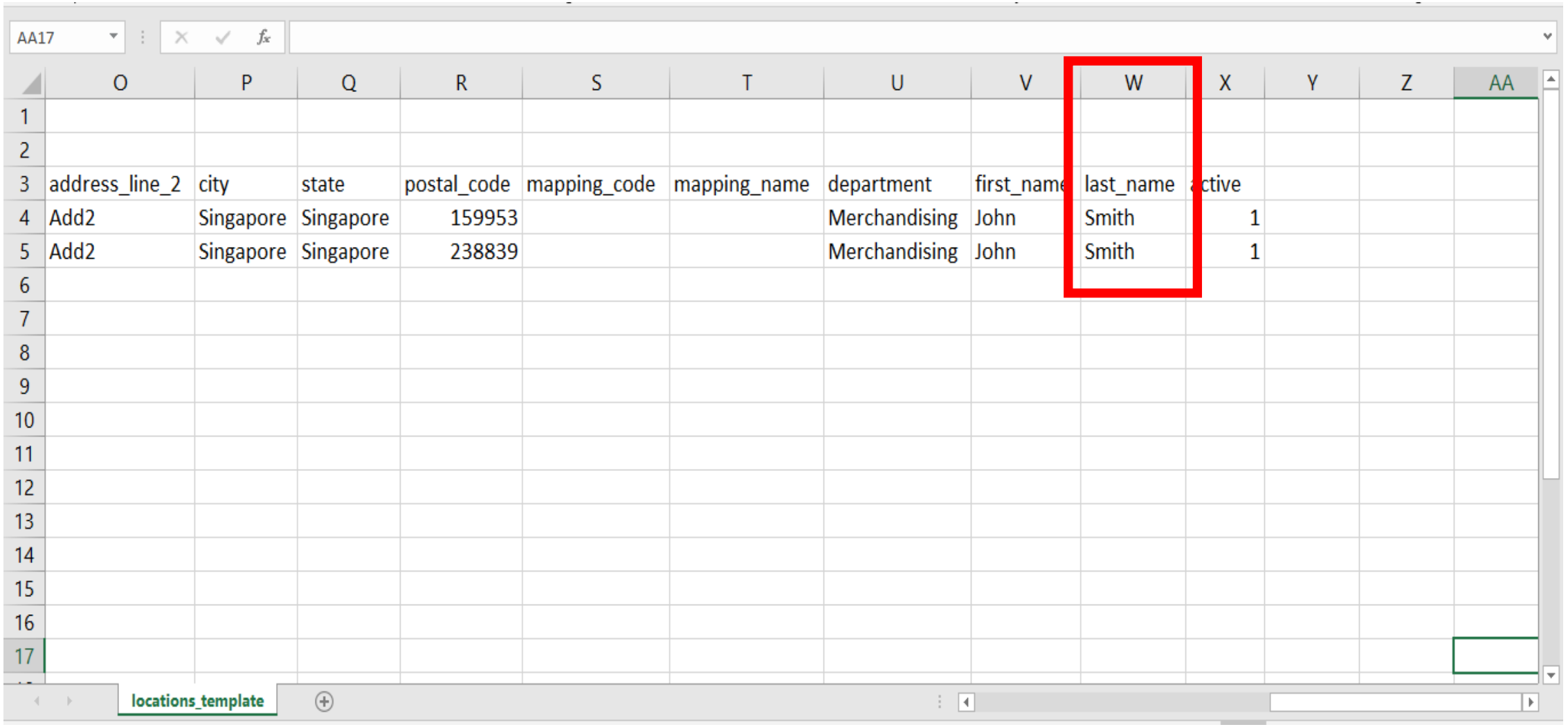
AA17

	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
1													
2													
3	address_line_2	city	state	postal_code	mapping_code	mapping_name	department	first_name	last_name	active			
4	Add2	Singapore	Singapore	159953			Merchandising	John	Smith	1			
5	Add2	Singapore	Singapore	238839			Merchandising	John	Smith	1			
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													

locations_template

OptimMerchandising – How to Add Locations by CSV Import

18. Under the “last_name” field (Column W), type the last name of the assigned merchandiser to the location. Ensure that the merchandiser name is already existing on the platform and must be typed exactly as it is taking note of the spelling, spaces and capitalization.



AA17

	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
1													
2													
3	address_line_2	city	state	postal_code	mapping_code	mapping_name	department	first_name	last_name	ctive			
4	Add2	Singapore	Singapore	159953			Merchandising	John	Smith	1			
5	Add2	Singapore	Singapore	238839			Merchandising	John	Smith	1			
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													

locations_template

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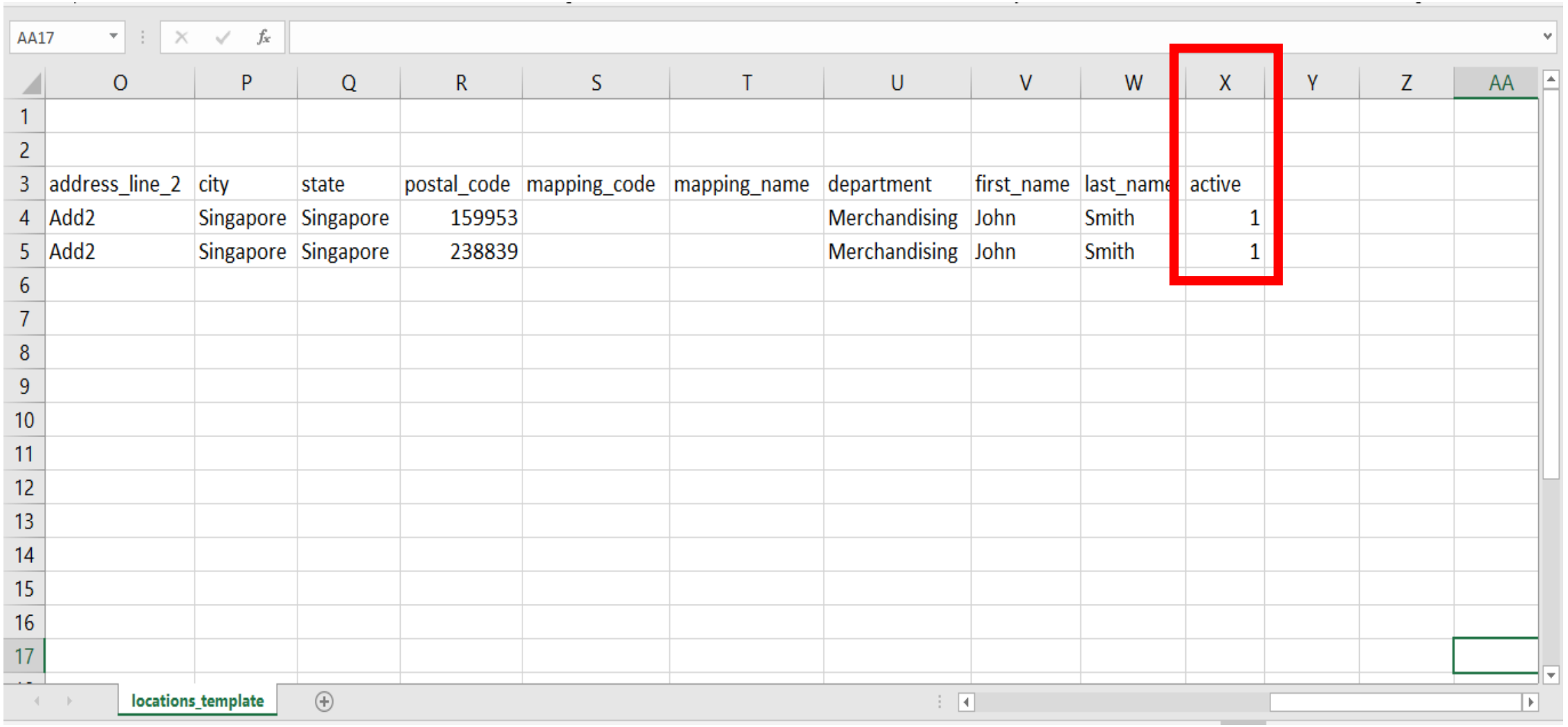
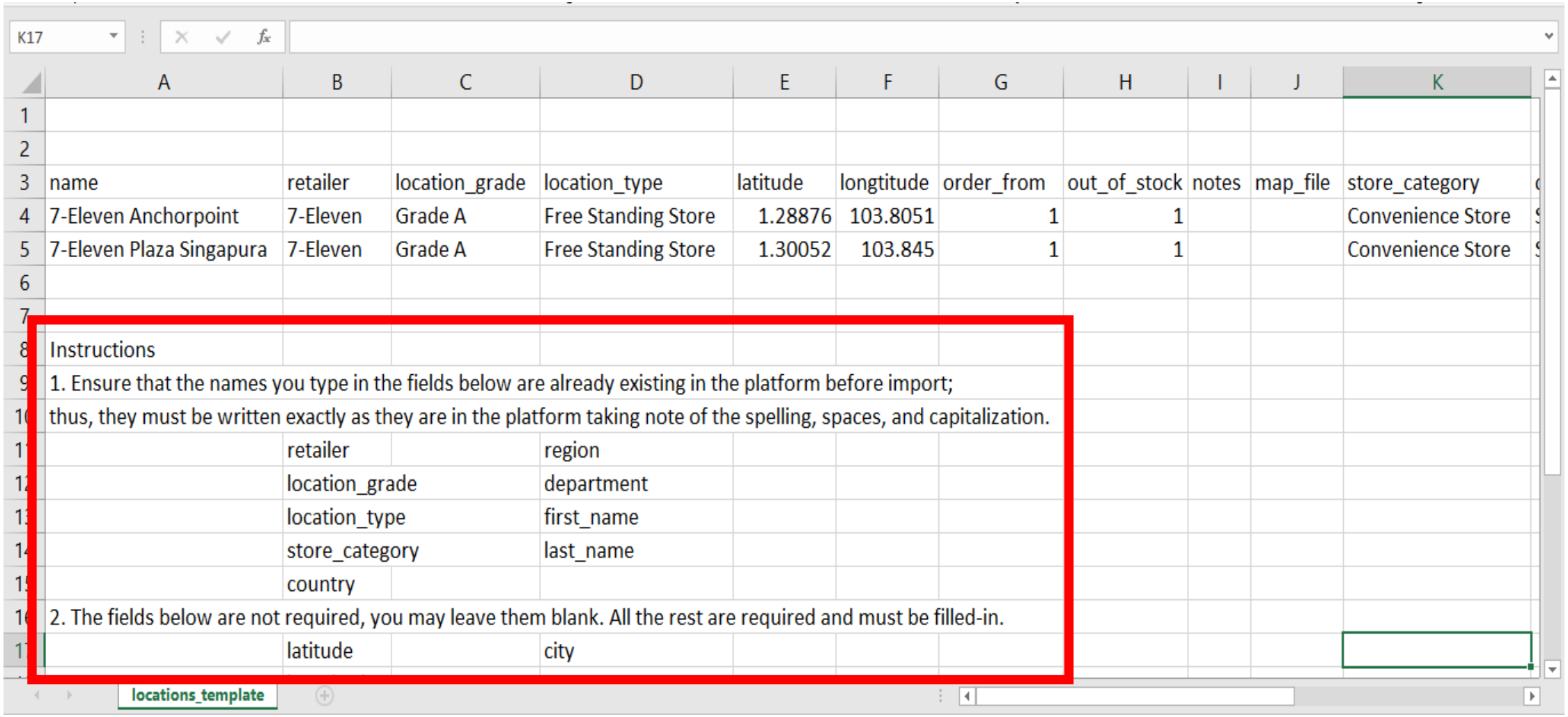
19. Under the “active” field (Column X), type “1” so that the location will be imported as active on the platform.



	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
1													
2													
3	address_line_2	city	state	postal_code	mapping_code	mapping_name	department	first_name	last_name	active			
4	Add2	Singapore	Singapore	159953			Merchandising	John	Smith	1			
5	Add2	Singapore	Singapore	238839			Merchandising	John	Smith	1			
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													

OptimMerchandising – How to Add Locations by CSV Import

20. Other notes. In CSV, there should be only 1 tab and no formatting such as borders, colors, etc. Also, delete the instructions in the template before import.



	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	name	retailer	location_grade	location_type	latitude	longtitude	order_from	out_of_stock	notes	map_file	store_category
4	7-Eleven Anchorpoint	7-Eleven	Grade A	Free Standing Store	1.28876	103.8051	1	1			Convenience Store
5	7-Eleven Plaza Singapura	7-Eleven	Grade A	Free Standing Store	1.30052	103.845	1	1			Convenience Store
6											
7											
8	Instructions										
9	1. Ensure that the names you type in the fields below are already existing in the platform before import;										
10	thus, they must be written exactly as they are in the platform taking note of the spelling, spaces, and capitalization.										
11		retailer		region							
12		location_grade		department							
13		location_type		first_name							
14		store_category		last_name							
15		country									
16	2. The fields below are not required, you may leave them blank. All the rest are required and must be filled-in.										
17		latitude		city							

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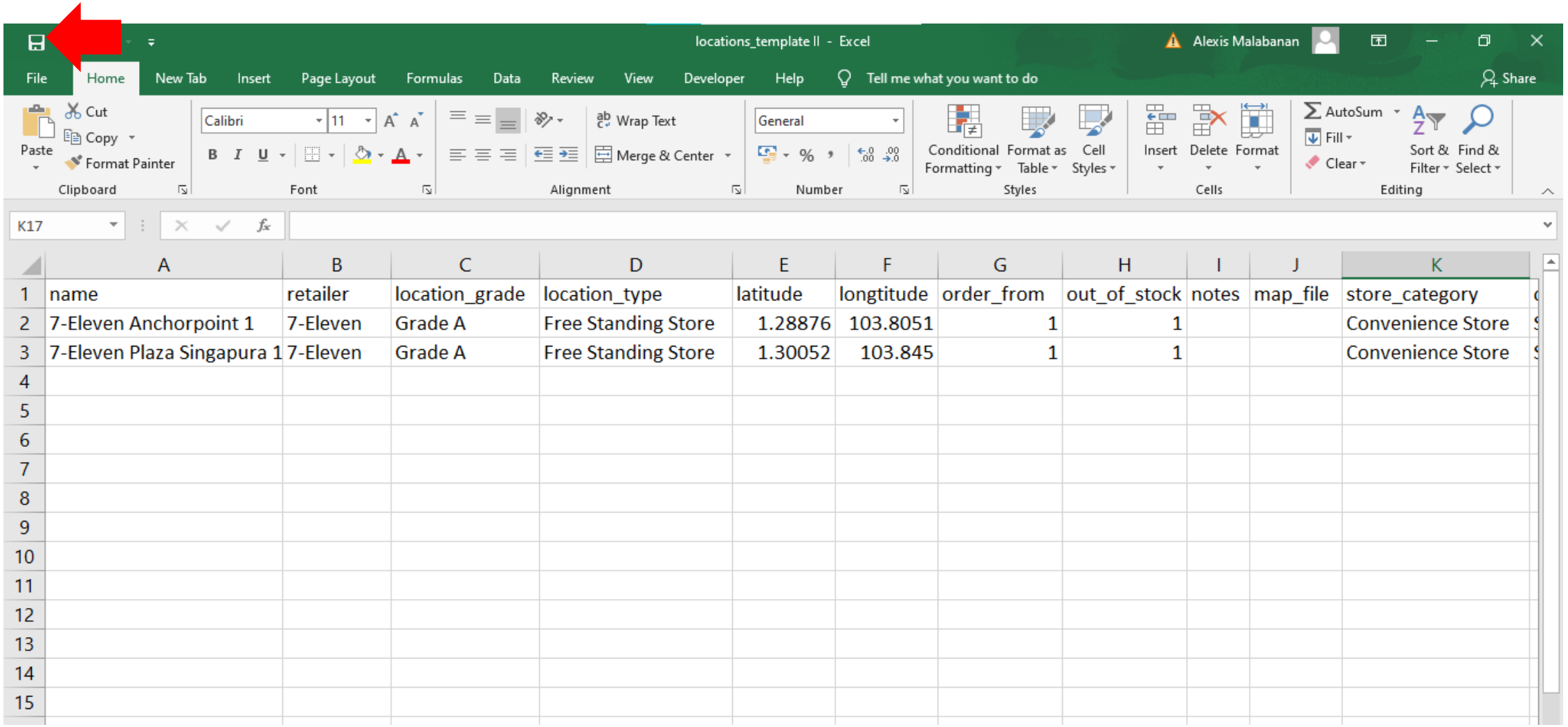
21. Save the import file.



	A	B	C	D	E	F	G	H	I	J	K
1	name	retailer	location_grade	location_type	latitude	longtitude	order_from	out_of_stock	notes	map_file	store_category
2	7-Eleven Anchorpoint 1	7-Eleven	Grade A	Free Standing Store	1.28876	103.8051	1	1			Convenience Store
3	7-Eleven Plaza Singapura 1	7-Eleven	Grade A	Free Standing Store	1.30052	103.845	1	1			Convenience Store
4											
5											
6											
7											
8											
9											
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11											
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15											

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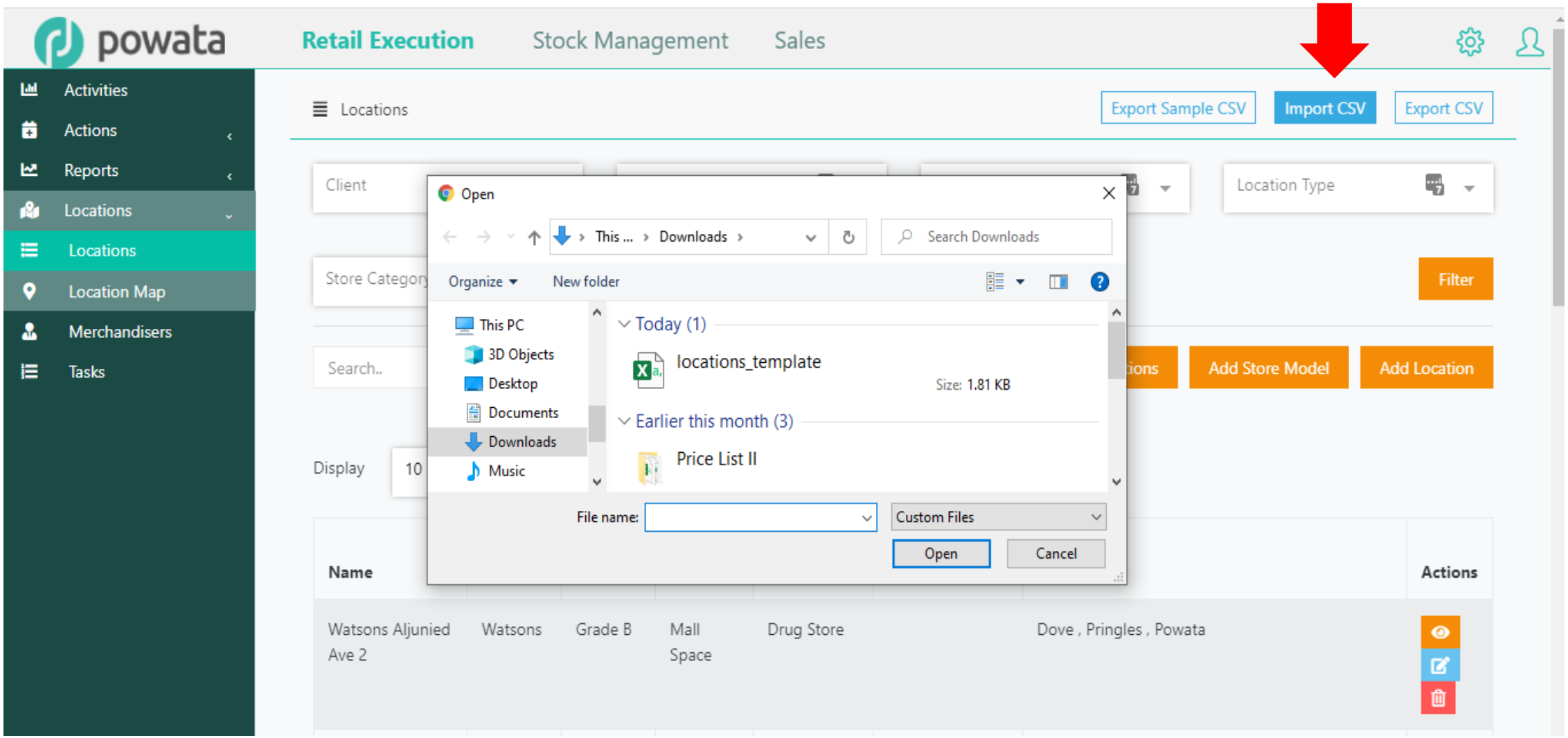
22. Import the file. Click on the Import CSV button and select the file.



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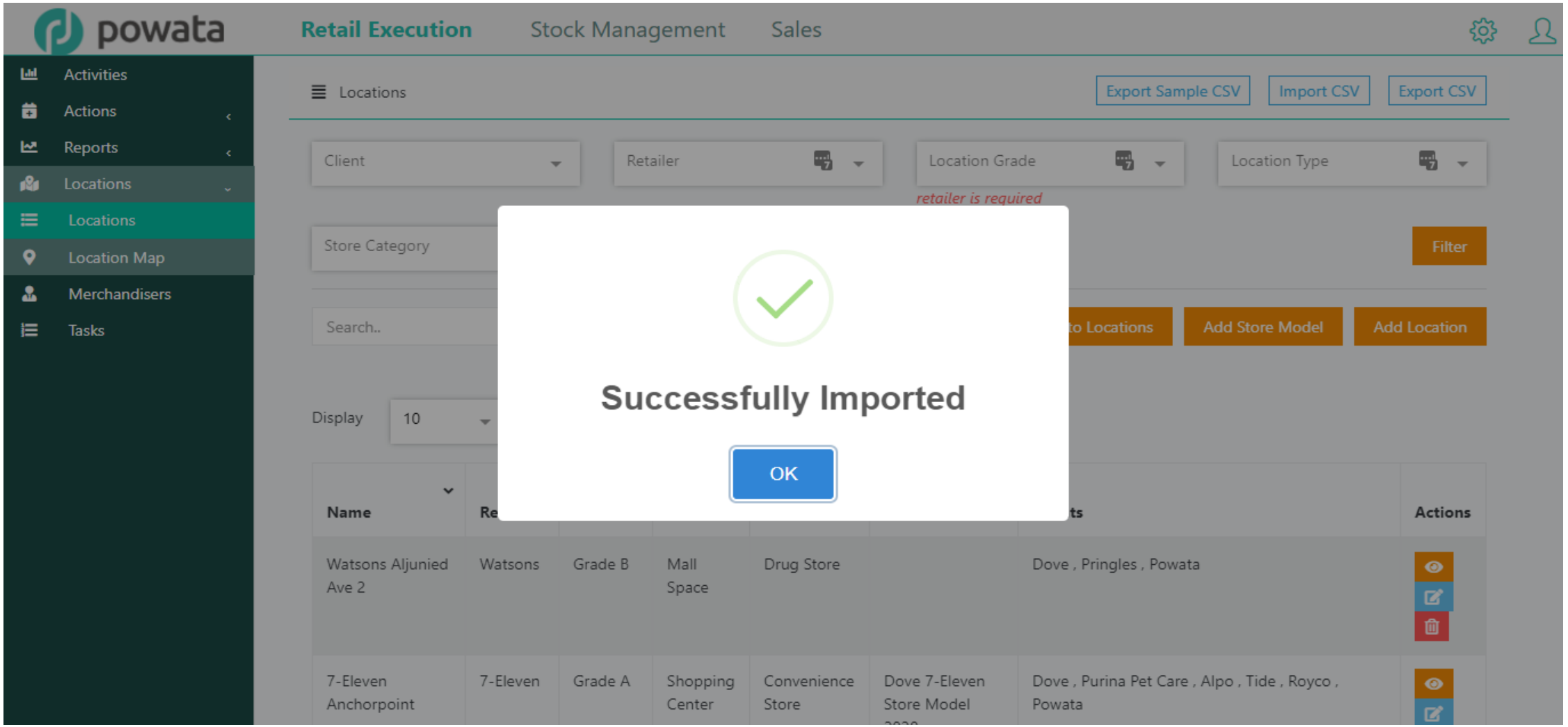
23. A pop-up message appears if import was successful.



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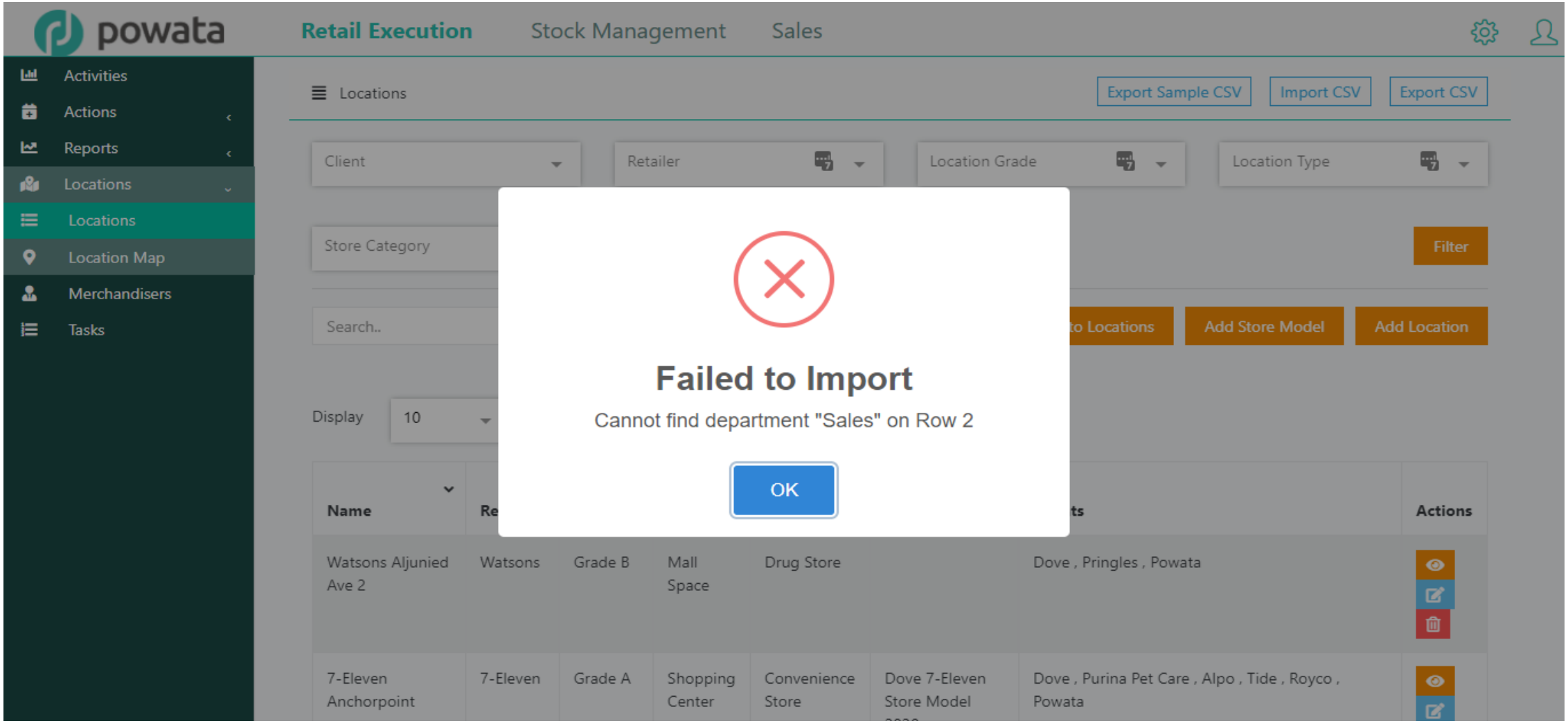
24. Otherwise, a message displays the field and row number the error came from.