



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

The screenshot shows the Powata application interface. The top navigation bar includes 'Retail Execution', 'Stock Management', and 'Sales'. A red arrow points to the 'Export Sample CSV' button in the top right corner. The main content area is titled 'Locations' and features several filters: 'Client', 'Retailer', 'Location Grade', and 'Location Type'. A red error message 'retailer is required' is displayed below the 'Retailer' filter. There is also a 'Store Category' filter and a 'Filter' button. Below the filters is a search bar and four action buttons: 'View Client Locations', 'Assign Client to Locations', 'Add Store Model', and 'Add Location'. The 'Display' dropdown is set to '10 records'. At the bottom, a table lists location records.

Name	Retailer	Location Grade	Location Type	Store Category	Store Model	Clients	Actions
Watsons Aljunied Ave 2	Watsons	Grade B	Mall Space	Drug Store		Dove , Pringles , Powata	 



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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	longitude	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				convenience Store
5	7-Eleven Plaza Singapura	7-Eleven	Grade A	Free Standing Store	1.30052	103.845	1				convenience 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	city	state	postal_code	mapping_code	mapping_name	department	first_name	last_name
4	North	370 Alexandra Road Central		Singapore	Singapore	15995			Merchandising	John	Smith
5	North	68 Orchard Road #01-29A Plaza		Singapore	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	retailer	location_grade	location_type	latitude	longitude	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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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	longitude	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	location_type	latitude	longitude	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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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	longitude	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	longitude	order_form	out_of_stock	notes	map_file	store_category
4	7-Eleven Anchorpoint	7-Eleven	Grade A	Free Standing Store	1.2887553	103.8050985	1	1			Convenience
5	7 Eleven Plaza Singapura	7-Eleven	Grade B	Corner	1.3005206	103.8449719	1	1			Convenience
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											
11											
12											
13											
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
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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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											
9											
10											
11											
12											
13											
14											
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											
8											
9											
10											
11											
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15											
16											
17											



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

The screenshot shows an Excel spreadsheet with a CSV import template. The columns are labeled J through T. The 'state' column (Q) is highlighted with a red box. The data in the spreadsheet is as follows:

	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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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											



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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	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													



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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.

	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													



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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.

	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													



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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													



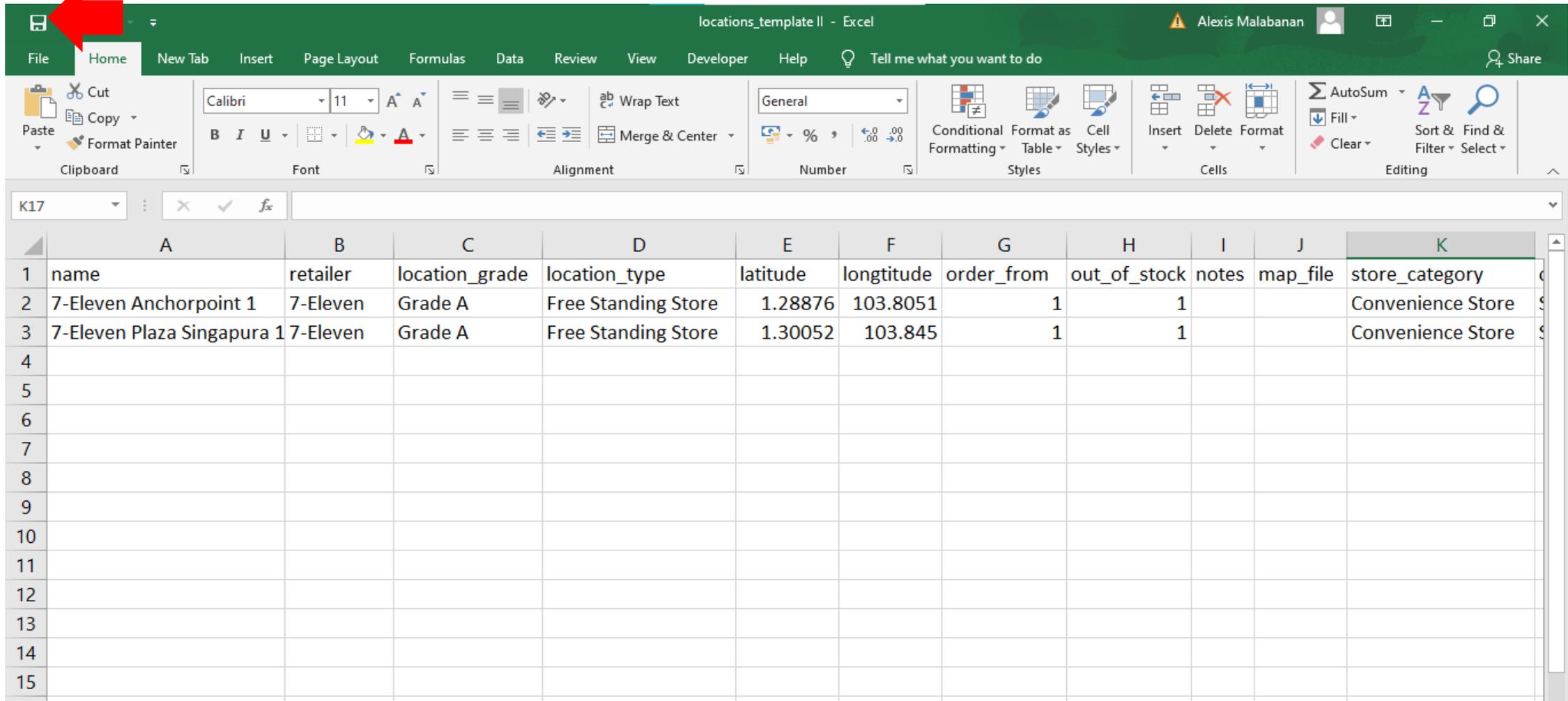
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20. Other notes. In CSV, there should be only 1 tab and no formatting such as borders, colors, etc. Also, delete the instructions in the template before import.

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	name	retailer	location_grade	location_type	latitude	longitude	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.

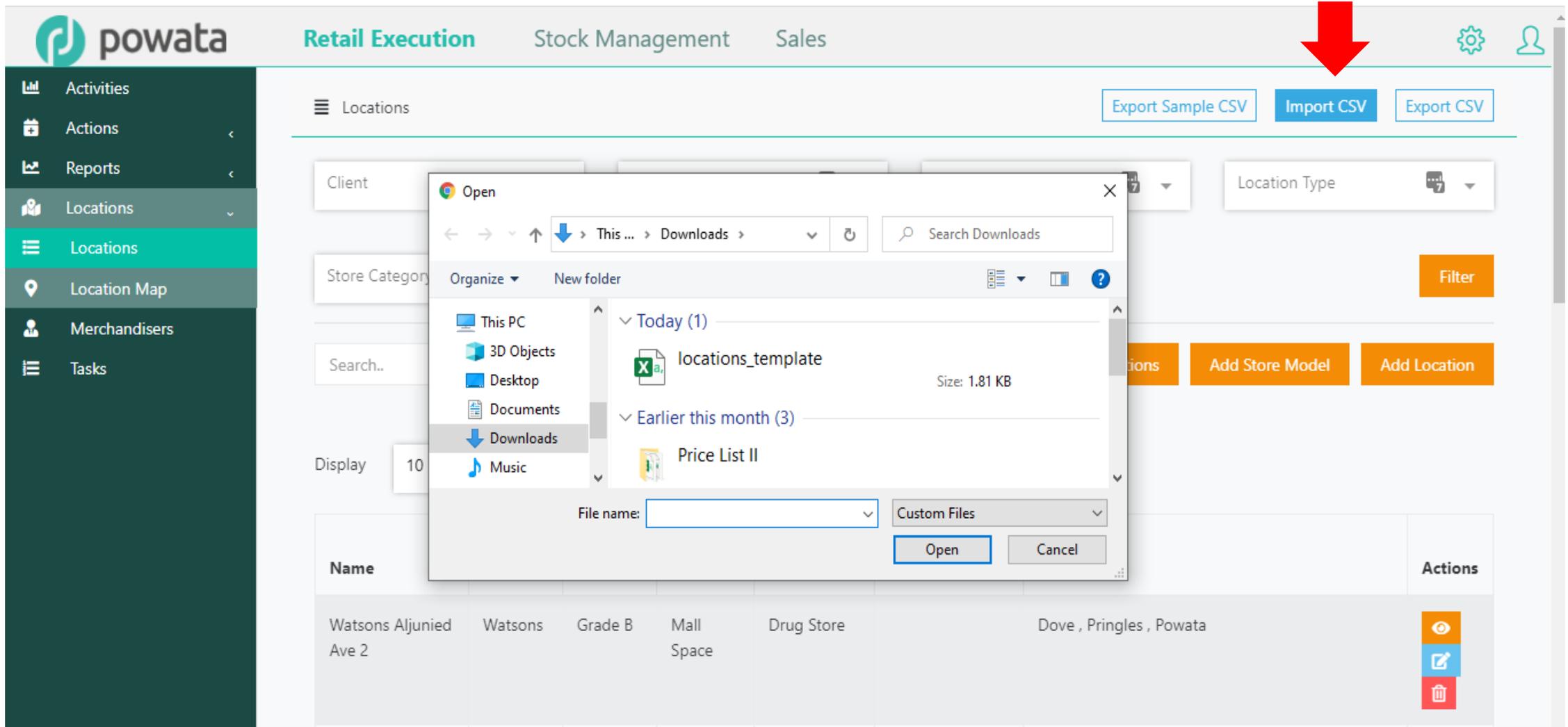


The screenshot shows the Microsoft Excel interface with the 'File' ribbon selected. A red arrow points to the 'Save' icon in the top-left corner. The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H	I	J	K
1	name	retailer	location_grade	location_type	latitude	longitude	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											
10											
11											
12											
13											
14											
15											

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

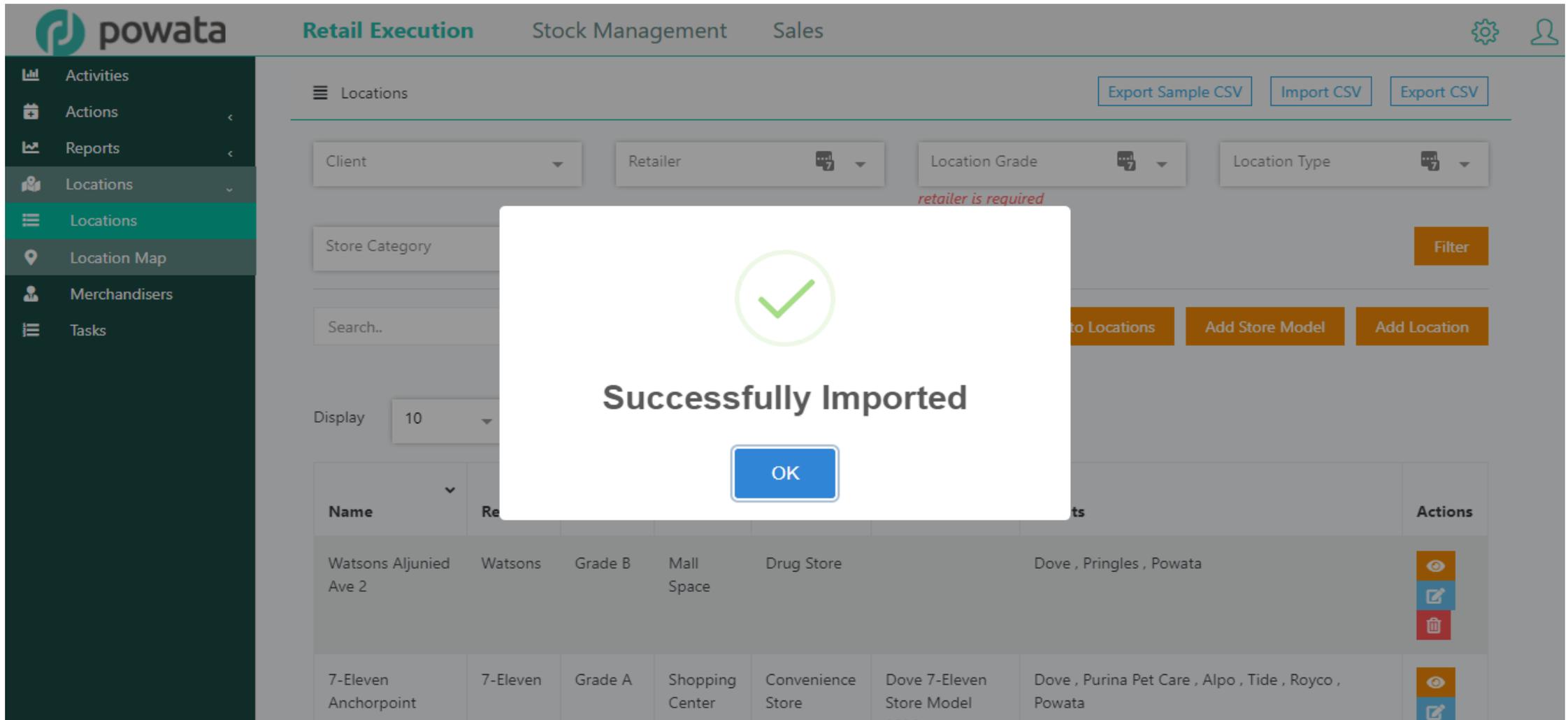


The screenshot displays the Powata Retail Execution interface. A red arrow points to the 'Import CSV' button in the top right corner. A file selection dialog box is open, showing the 'Downloads' folder. The file 'locations_template' (1.81 KB) is selected. The dialog box also shows other files like 'Price List II' and a search bar. The background interface includes a sidebar with navigation options like 'Locations', 'Location Map', and 'Merchandisers'. The main area shows a table of locations with columns for Name, Client, Store Category, and Actions.

Name	Client	Store Category	Actions
Watsons Aljunied Ave 2	Watsons	Grade B Mall Space	Drug Store

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



The screenshot displays the Powata Retail Execution interface. A central pop-up message with a green checkmark icon and the text "Successfully Imported" is overlaid on the screen. Below the message is a blue "OK" button. The background interface shows a navigation menu on the left with options like Activities, Actions, Reports, Locations, Location Map, Merchandisers, and Tasks. The main content area is titled "Locations" and includes filters for Client, Retailer, Location Grade, and Location Type. A table of location data is visible at the bottom, with columns for Name, Retailer, Location Grade, Location Type, and Actions.

Name	Retailer	Location Grade	Location Type	Actions
Watsons Aljunied Ave 2	Watsons	Grade B	Mall Space Drug Store	  
7-Eleven Anchorpoint	7-Eleven	Grade A	Shopping Center Convenience Store	 

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

The screenshot displays the Powata Retail Execution interface. A modal dialog box is centered on the screen, indicating a failed import. The dialog contains a red 'X' icon, the title 'Failed to Import', and the message 'Cannot find department "Sales" on Row 2'. An 'OK' button is located at the bottom of the dialog.

The background interface shows the 'Locations' management screen. It includes a sidebar with navigation options: Activities, Actions, Reports, Locations, Location Map, Merchandisers, and Tasks. The main area features a header with 'Retail Execution', 'Stock Management', and 'Sales'. Below the header are filters for Client, Retailer, Location Grade, and Location Type. A search bar and a 'Filter' button are also present. A table of locations is visible at the bottom, with columns for Name, Retailer, Grade, Location Type, and Actions.

Name	Retailer	Grade	Location Type	Actions
Watsons Aljunied Ave 2	Watsons	Grade B	Mall Space Drug Store	
7-Eleven Anchorpoint	7-Eleven	Grade A	Shopping Center Convenience Store	