



OptimMerchandising – How to Create Promoter Rosters by CSV Import

1. Go to app.optimmerchandising.com and log in with the manager or supervisor credentials.
2. Download the roster template. Go to Sales Module > Actions > Rosters > Export Sample CSV

powata Retail Execution Stock Management **Sales**

Promoter Roster

Export Sample CSV Import CSV Export CSV

Promoter Location Department Client Status

From * 2020-08-22 To * 2020-09-21 Filter

Search.. Assign New Shift Bulk Create Shift

Display 10 records

Promoter	Department	Location	Shift	Client	Status	Action
First Promoter	Beauty and Personal Care	Guardian Admiralty Place	2020-08-24 @ 09:00 AM to 05:00 PM	Unilever	pending	



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3. Open the template. All fields are required and must be filled-in. Each row in the file represents 1 roster.

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	promoter	department	location	client	status	shift date	shift time from	shift time to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	08/01/2020	9:00	13:00	1	0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	08/01/2020	13:00	18:00	1	0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14	3. All fields are required and must be filled-in.									
15	4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16	5. The shift_time_to must always be set at a later time than the shift_time_from.									
17	6. In active field, type "1" so all roster will be imported as active.									



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4. Under the “promoter” field (Column A), type the name of promoter (first name_last name) who will perform the roster. Ensure that the name of promoter 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
promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	08/01/2020	9:00	13:00	1	0
Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	08/01/2020	13:00	18:00	1	0
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 promoter location									
12 department client									
13 2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14 3. All fields are required and must be filled-in.									
15 4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16 5. The shift_time_to must always be set at a later time than the shift_time_from.									
17 6. In active field, type "1" so all roster will be imported as active.									



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5. Under the “department” field (Column B), type the department the promoter belongs to. 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.

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	08/01/2020	9:00	13:00	1	0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	08/01/2020	13:00	18:00	1	0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14	3. All fields are required and must be filled-in.									
15	4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16	5. The shift_time_to must always be set at a later time than the shift_time_from.									
17	6. In active field, type "1" so all roster will be imported as active.									



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6. Under the “location” field (Column C), type the roster location. Ensure that the location 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
1										
2										
3	promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	unilever	pending	08/01/2020	9:00	13:00	1	0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	unilever	pending	08/01/2020	13:00	18:00	1	0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14	3. All fields are required and must be filled-in.									
15	4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16	5. The shift_time_to must always be set at a later time than the shift_time_from.									
17	6. In active field, type "1" so all roster will be imported as active.									



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7. Under the “client” field (Column D), type the client. Ensure that the client 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
1										
2										
3	promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	08/01/2020	9:00	13:00	1	0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	08/01/2020	13:00	18:00	1	0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14	3. All fields are required and must be filled-in.									
15	4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16	5. The shift_time_to must always be set at a later time than the shift_time_from.									
17	6. In active field, type "1" so all roster will be imported as active.									



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8. Under the “status” field (Column E), type “pending” so that the rosters will be imported as open and yet to be completed.

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	8/01/2020	9:00	13:00	1	0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	8/01/2020	13:00	18:00	1	0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14	3. All fields are required and must be filled-in.									
15	4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16	5. The shift_time_to must always be set at a later time than the shift_time_from.									
17	6. In active field, type "1" so all roster will be imported as active.									



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9. Under the “shift_date” field (Column F), type the date of the roster. Take note of the date format which is “mm/dd/yyyy”.

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	08/01/2020	9:00	13:00	1	0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	08/01/2020	13:00	18:00	1	0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14	3. All fields are required and must be filled-in.									
15	4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16	5. The shift_time_to must always be set at a later time than the shift_time_from.									
17	6. In active field, type "1" so all roster will be imported as active.									



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10. Under the “shift_time_from” field (Column G), type the start time of the roster. Take note of the time format which is “hh:mm” 24 hour clock.

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	08/01/2020	9:00	13:00	1	0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	08/01/2020	13:00	18:00	1	0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14	3. All fields are required and must be filled-in.									
15	4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16	5. The shift_time_to must always be set at a later time than the shift_time_from.									
17	6. In active field, type "1" so all roster will be imported as active.									



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11. Under the “shift_time_to” field (Column H), type the end time of the roster. Take note of the time format which is “hh:mm” 24 hour clock. Also, the end time must always be set at a later time than the start time.

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	08/01/2020	9:00	13:00	1	0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	08/01/2020	13:00	18:00	1	0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14	3. All fields are required and must be filled-in.									
15	4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16	5. The shift_time_to must always be set at a later time than the shift_time_from.									
17	6. In active field, type "1" so all roster will be imported as active.									



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12. Under the “active” field (Column I), type “1” so that the rosters will be imported as active.

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	08/01/2020	9:00	13:00	1	0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	08/01/2020	13:00	18:00	1	0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14	3. All fields are required and must be filled-in.									
15	4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16	5. The shift_time_to must always be set at a later time than the shift_time_from.									
17	6. In active field, type "1" so all roster will be imported as active.									



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13. Under the “completed” field (Column J), type “0” so that the rosters will be imported as uncompleted.

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	08/01/2020	9:00	13:00		0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	08/01/2020	13:00	18:00		0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14	3. All fields are required and must be filled-in.									
15	4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16	5. The shift_time_to must always be set at a later time than the shift_time_from.									
17	6. In active field, type "1" so all roster will be imported as active.									



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14. 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
1										
2										
3	promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	08/01/2020	9:00	13:00	1	0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	08/01/2020	13:00	18:00	1	0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									
14	3. All fields are required and must be filled-in.									
15	4. Take note of the date format which is "mm/dd/yyyy" and the time format which is "hh:mm" 24 hour clock.									
16	5. The shift_time_to must always be set at a later time than the shift_time_from.									
17	6. In active field, type "1" so all roster will be imported as active.									



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15. Save the import file.

The screenshot shows the Microsoft Excel interface with the 'File' tab selected. A red arrow points to the 'Save' icon. The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	promoter	department	location	client	status	shift_date	shift_time_from	shift_time_to	active	completed
4	Jane Smith	Beauty and Personal Care	FairPrice French Road	Unilever	pending	08/01/2020	9:00	13:00	1	0
5	Ben Hughes	Beauty and Personal Care	FairPrice Square Mall	Unilever	pending	08/01/2020	13:00	18:00	1	0
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		promoter		location						
12		department		client						
13	2. For status field, type "pending" so that the roster is imported as open and yet to be completed.									

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

The screenshot displays the Powata web application interface for managing Promoter Rosters. The top navigation bar includes 'Retail Execution', 'Stock Management', and 'Sales'. The left sidebar lists various modules, with 'Roster' selected. The main content area shows the 'Promoter Roster' management screen, featuring buttons for 'Export Sample CSV', 'Import CSV', and 'Export CSV'. A red arrow points to the 'Import CSV' button. An 'Open' file dialog box is overlaid on the screen, showing the 'Downloads' folder with files like 'promoters_roster_template' (1.30 KB) and 'Product Price List' (512 KB). The background shows a table of promoter rosters with columns for Client, Status, and Action.

Client	Status	Action
Unilever	pending	  
Unilever	pending	  



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

The screenshot shows the Powata Promoter Roster interface. A white pop-up message with a green checkmark and the text "Successfully Imported" is centered over the main content. Below the message is a blue "OK" button. The background interface includes a sidebar with navigation options like "Activities", "Actions", "Roster", "Roster Calendar", "Reports", "Locations", "Promoters", and "Sales Targets". The main area has filters for Promoter, Location, Department, Client, and Status, along with buttons for "Export Sample CSV", "Import CSV", and "Export CSV". A table below the filters displays roster data with columns for Promoter, Department, Location, Date/Time, Client, Status, and Action.

Promoter	De	Location	Date/Time	Client	Status	Action
First Promoter	Beauty and Personal Care	Guardian Admiralty Place	2020-08-25 @ 09:00 AM to 05:00 PM	Unilever	pending	
First Promoter	Beauty and Personal Care	Guardian Admiralty Place	2020-08-26 @ 09:00 AM to 05:00 PM	Unilever	Started	



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

The screenshot shows the Powata Promoter Roster interface. A modal dialog box is displayed in the center with a red 'X' icon and the following text:

Failed to Import
Cannot find department "Sales" on Row 2
Cannot find location "Guardian Raffles" on Row 3

Below the error message is an "OK" button. The background interface includes a sidebar with navigation options (Activities, Actions, Roster, Roster Calendar, Reports, Locations, Promoters, Sales Targets), a top navigation bar (Retail Execution, Stock Management, Sales), and a main content area with filters (Promoter, Location, Department, Client, Status), a date range (From: 2020-08-22), a search bar, a display count (10), and a table of promoter rosters.

Promoter	Department	Location	Shift	Client	Status	Action
First Promoter	Beauty and Personal Care	Guardian Admiralty Place	2020-08-25 @ 09:00 AM to 05:00 PM	Unilever	pending	
First Promoter	Beauty and Personal Care	Guardian Admiralty Place	2020-08-26 @ 09:00 AM to 05:00 PM	Unilever	Started	