



OptimMerchandising – How to Create Visits by CSV Import

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

The screenshot shows the 'powata' web application interface. The top navigation bar includes 'Retail Execution', 'Stock Management', and 'Sales'. A sidebar on the left lists various menu items: Activities, Actions, Visits (highlighted), Calendar, Reports, Locations, Merchandisers, and Tasks. The main content area is titled 'Visits' and features several controls: a 'Retailer' dropdown, a 'Merchandiser' dropdown, and a 'To Complete' dropdown. Below these are date pickers for 'From' (2020-08-08) and 'To' (2020-09-07), followed by a 'Filter' button. There are four orange action buttons: 'Bulk Add Visit', 'Create Task', 'Add New Visit', and 'Add Recurring V...'. A 'Display' dropdown is set to '10 records'. At the bottom, there is a search bar and a table header with columns: Name, Description, Visit Date, Merchandiser, Location, Retailer, Status, and Action. A red arrow points to the 'Export Sample CSV' button in the top right corner of the main content area.



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

	A	B	C	D	E	F	G	H	I
1									
2									
3	name	description	merchandiser	client	retailer	location	department	visit_date_start	visit_date_end
4	Merchandising Audit	merchandising audit	John Smith	Unilever	Guardian	Guardian 18 Tai Seng	Merchandising	04/18/2019 9:00	04/18/2019 18:00
5	Weekly Visit	weekly visit	Ann Hughes	Unilever	Guardian	Guardian Aljunied Blk113	Merchandising	04/18/2019 13:30	04/18/2019 20:00
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		merchandiser		department					
12		retailer		task_name					
13		location							
14	2. All fields are required and must be filled-in.								
15	3. Take note of the date and time format which is "mm/dd/yyyy hh:mm" 24 hour clock.								
16	4. The visit_date_end must always be set at a later time than the visit_date_start.								
17	5. In active and urgent field, type "1" so all visits will be imported as active.								



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4. Under the “name” field (Column A), type the visit name. You may type anything on this column; however, the number of characters cannot exceed 32.

	A	B	C	D	E	F	G	H	I
1									
2									
3	name	description	merchandiser	client	retailer	location	department	visit_date_start	visit_date_end
4	Merchandising Audit	merchandising audit	John Smith	Unilever	Guardian	Guardian 18 Tai Seng	Merchandising	04/18/2019 9:00	04/18/2019 18:00
5	Weekly Visit	weekly visit	Ann Hughes	Unilever	Guardian	Guardian Aljunied Blk113	Merchandising	04/18/2019 13:30	04/18/2019 20:00
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		merchandiser		department					
12		retailer		task_name					
13		location							
14	2. All fields are required and must be filled-in.								
15	3. Take note of the date and time format which is "mm/dd/yyyy hh:mm" 24 hour clock.								
16	4. The visit_date_end must always be set at a later time than the visit_date_start.								
17	5. In active and urgent field, type "1" so all visits will be imported as active.								



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5. Under the “description” field (Column B), type the visit description. You may type anything on this column and there’s no limit to the number of characters it can have.

	A	B	C	D	E	F	G	H	I
1									
2									
3	name	description	merchandiser	client	retailer	location	department	visit_date_start	visit_date_end
4	Merchandising Audit	merchandising audit	John Smith	Unilever	Guardian	Guardian 18 Tai Seng	Merchandising	04/18/2019 9:00	04/18/2019 18:00
5	Weekly Visit	weekly visit	Ann Hughes	Unilever	Guardian	Guardian Aljunied Blk113	Merchandising	04/18/2019 13:30	04/18/2019 20:00
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		merchandiser		department					
12		retailer		task_name					
13		location							
14	2. All fields are required and must be filled-in.								
15	3. Take note of the date and time format which is "mm/dd/yyyy hh:mm" 24 hour clock.								
16	4. The visit_date_end must always be set at a later time than the visit_date_start.								
17	5. In active and urgent field, type "1" so all visits will be imported as active.								



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6. Under the “merchandiser” field (Column C), type the name of merchandiser (first name_last name) who will perform the visit. Ensure that the name of merchandiser 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
1									
2									
3	name	description	merchandiser	client	retailer	location	department	visit_date_start	visit_date_end
4	Merchandising Audit	merchandising audit	John Smith	Wilever	Guardian	Guardian 18 Tai Seng	Merchandising	04/18/2019 9:00	04/18/2019 18:00
5	Weekly Visit	weekly visit	Ann Hughes	Wilever	Guardian	Guardian Aljunied Blk113	Merchandising	04/18/2019 13:30	04/18/2019 20:00
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		merchandiser		department					
12		retailer		task_name					
13		location							
14	2. All fields are required and must be filled-in.								
15	3. Take note of the date and time format which is "mm/dd/yyyy hh:mm" 24 hour clock.								
16	4. The visit_date_end must always be set at a later time than the visit_date_start.								
17	5. In active and urgent field, type "1" so all visits 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
1									
2									
3	name	description	merchandiser	client	retailer	location	department	visit_date_start	visit_date_end
4	Merchandising Audit	merchandising audit	John Smith	Unilever	Guardian	Guardian 18 Tai Seng	Merchandising	04/18/2019 9:00	04/18/2019 18:00
5	Weekly Visit	weekly visit	Ann Hughes	Unilever	Guardian	Guardian Aljunied Blk113	Merchandising	04/18/2019 13:30	04/18/2019 20:00
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		merchandiser		department					
12		retailer		task_name					
13		location							
14	2. All fields are required and must be filled-in.								
15	3. Take note of the date and time format which is "mm/dd/yyyy hh:mm" 24 hour clock.								
16	4. The visit_date_end must always be set at a later time than the visit_date_start.								
17	5. In active and urgent field, type "1" so all visits will be imported as active.								



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8. Under the “retailer” field (Column E), type the 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
1									
2									
3	name	description	merchandiser	client	retailer	location	department	visit_date_start	visit_date_end
4	Merchandising Audit	merchandising audit	John Smith	Unilever	Guardian	Guardian 18 Tai Seng	Merchandising	04/18/2019 9:00	04/18/2019 18:00
5	Weekly Visit	weekly visit	Ann Hughes	Unilever	Guardian	Guardian Aljunied Blk113	Merchandising	04/18/2019 13:30	04/18/2019 20:00
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		merchandiser		department					
12		retailer		task_name					
13		location							
14	2. All fields are required and must be filled-in.								
15	3. Take note of the date and time format which is "mm/dd/yyyy hh:mm" 24 hour clock.								
16	4. The visit_date_end must always be set at a later time than the visit_date_start.								
17	5. In active and urgent field, type "1" so all visits will be imported as active.								



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9. Under the “location” field (Column F), type the visit 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
1									
2									
3	name	description	merchandiser	client	retailer	location	department	visit_date_start	visit_date_end
4	Merchandising Audit	merchandising audit	John Smith	Unilever	Guardian	Guardian 18 Tai Seng	Merchandising	04/18/2019 9:00	04/18/2019 18:00
5	Weekly Visit	weekly visit	Ann Hughes	Unilever	Guardian	Guardian Aljunied Blk113	Merchandising	04/18/2019 13:30	04/18/2019 20:00
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		merchandiser		department					
12		retailer		task_name					
13		location							
14	2. All fields are required and must be filled-in.								
15	3. Take note of the date and time format which is "mm/dd/yyyy hh:mm" 24 hour clock.								
16	4. The visit_date_end must always be set at a later time than the visit_date_start.								
17	5. In active and urgent field, type "1" so all visits will be imported as active.								



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10. Under the “department” field (Column G), type the department the merchandiser 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
1									
2									
3	name	description	merchandiser	client	retailer	location	department	visit_date_start	visit_date_end
4	Merchandising Audit	merchandising audit	John Smith	Unilever	Guardian	Guardian 18 Tai Seng	Merchandising	4/18/2019 9:00	04/18/2019 18:00
5	Weekly Visit	weekly visit	Ann Hughes	Unilever	Guardian	Guardian Aljunied Blk113	Merchandising	4/18/2019 13:30	04/18/2019 20:00
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		merchandiser		department					
12		retailer		task_name					
13		location							
14	2. All fields are required and must be filled-in.								
15	3. Take note of the date and time format which is "mm/dd/yyyy hh:mm" 24 hour clock.								
16	4. The visit_date_end must always be set at a later time than the visit_date_start.								
17	5. In active and urgent field, type "1" so all visits will be imported as active.								



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11. Under the “visit_date_start” and “visit_date_end” fields (Column H and I), type the date and time of the visit. Take note of the date and time format which is “mm/dd/yyyy hh:mm” 24 hour clock. Also, the visit_date_end must always be set at a later time than the visit_date_start.

	G	H	I	J	K	L	M	N	O	P	Q	R
1												
2												
3	department	visit_date_start	visit_date_end	task_name	active	urgent						
4	Merchandising	04/18/2019 9:00	04/18/2019 18:00	Generic task Retail Check	1	1						
5	Merchandising	04/18/2019 13:30	04/18/2019 20:00	Retail Check	1	1						
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												



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12. Under the “task_name” field (Column J), type the tasks for the visit. Ensure that the tasks are already existing on the platform and must be typed exactly as they are taking note of the spelling, spaces and capitalization. To have more than 1 task in a visit, insert a pipe symbol “|” (press and hold down SHIFT while pressing the backslash key) between the task names.

	G	H	I	J	K	L	M	N	O	P	Q	R
1												
2												
3	department	visit_date_start	visit_date_end	task_name	active	urgent						
4	Merchandising	04/18/2019 9:00	04/18/2019 18:00	Generic task Retail Check	1	1						
5	Merchandising	04/18/2019 13:30	04/18/2019 20:00	Retail Check	1	1						
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												



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13. Under the “active” and “urgent” fields (Columns K and L), type “1” so that the visits will be imported as active.

	G	H	I	J	K	L	M	N	O	P	Q	R
1												
2												
3	department	visit_date_start	visit_date_end	task_name	active	urgent						
4	Merchandising	04/18/2019 9:00	04/18/2019 18:00	Generic task Retail Check	1	1						
5	Merchandising	04/18/2019 13:30	04/18/2019 20:00	Retail Check	1	1						
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												



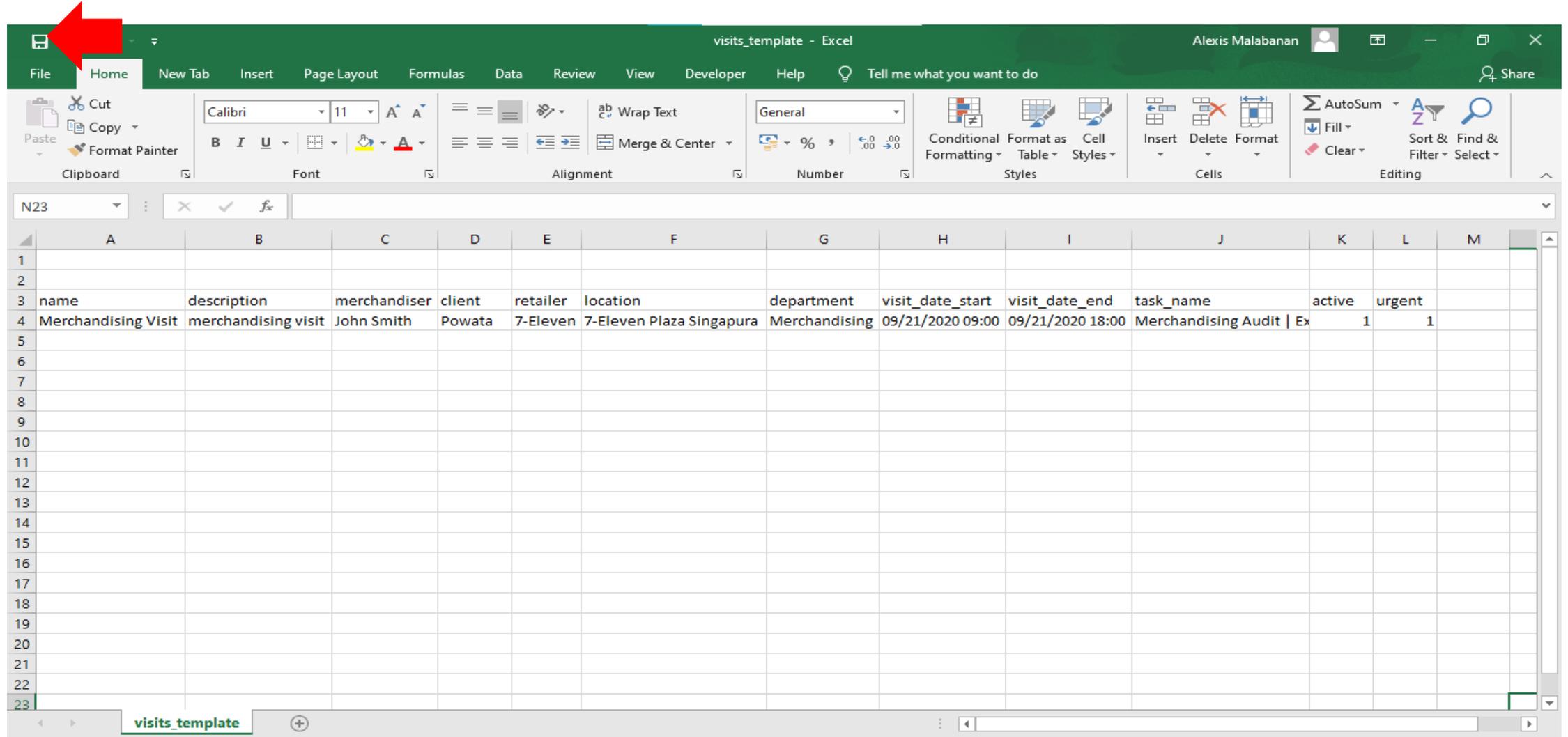
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14. Other notes. In CSV, there should be only 1 tab and no formatting such as borders, colors, etc. Also, delete the instructions in the template before import.

	A	B	C	D	E	F	G	H	I
1									
2									
3	name	description	merchandiser	client	retailer	location	department	visit_date_start	visit_date_end
4	Merchandising Audit	merchandising audit	John Smith	Unilever	Guardian	Guardian 18 Tai Seng	Merchandising	04/18/2019 9:00	04/18/2019 18:00
5	Weekly Visit	weekly visit	Ann Hughes	Unilever	Guardian	Guardian Aljunied Blk113	Merchandising	04/18/2019 13:30	04/18/2019 20:00
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		merchandiser		department					
12		retailer		task_name					
13		location							
14	2. All fields are required and must be filled-in.								
15	3. Take note of the date and time format which is "mm/dd/yyyy hh:mm" 24 hour clock.								
16	4. The visit_date_end must always be set at a later time than the visit_date_start.								
17	5. In active and urgent field, type "1" so all visits will be imported as active.								

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15. Save the file.



The screenshot shows the Microsoft Excel interface with the 'File' menu highlighted by a red arrow. The spreadsheet contains a table with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3	name	description	merchandise	client	retailer	location	department	visit_date_start	visit_date_end	task_name	active	urgent	
4	Merchandising Visit	merchandising visit	John Smith	Powata	7-Eleven	7-Eleven Plaza Singapura	Merchandising	09/21/2020 09:00	09/21/2020 18:00	Merchandising Audit Ex	1	1	
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													
23													

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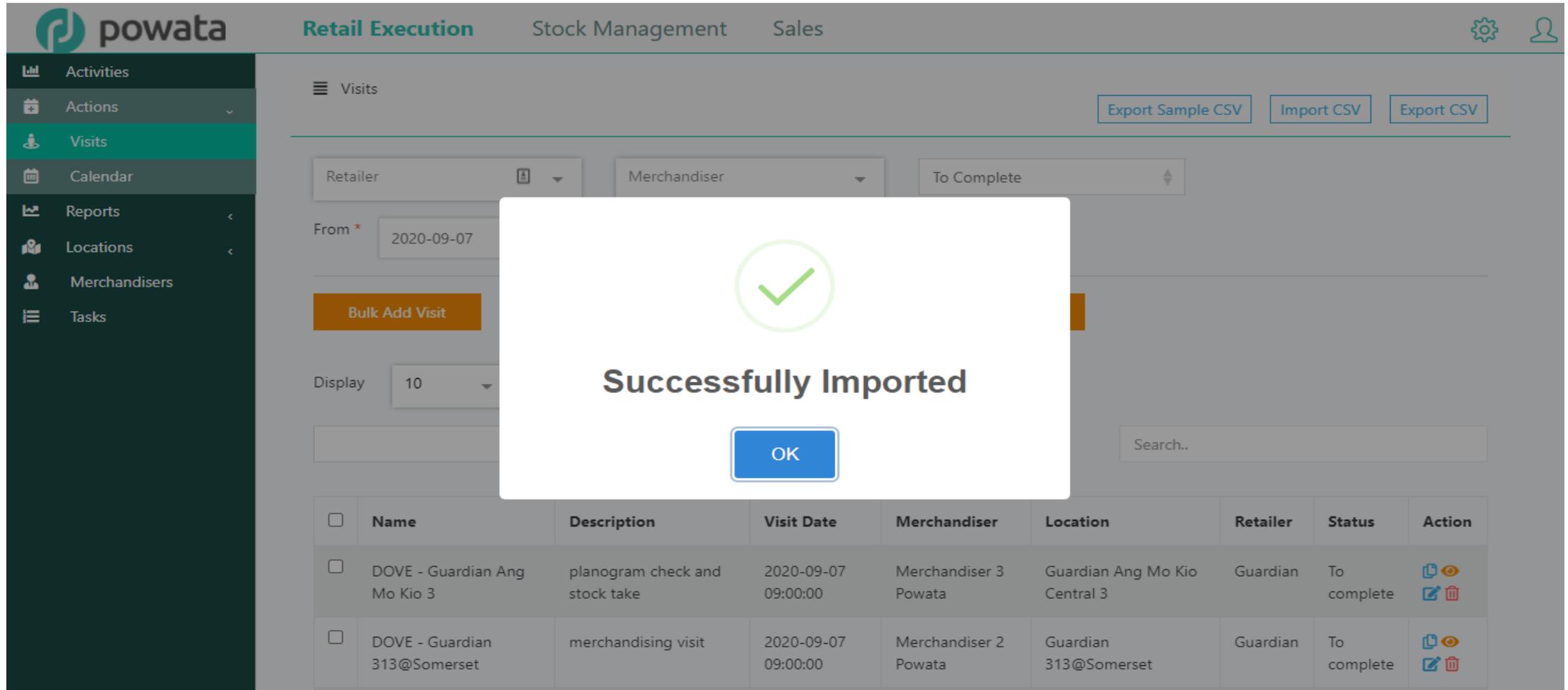
16. Import the file. Click on the Import CSV button and select the file.

The screenshot displays the Powata Retail Execution interface. The left sidebar contains navigation options: Activities, Actions, Visits (highlighted), Calendar, Reports, Locations, Merchandisers, and Tasks. The main content area is titled 'Visits' and includes buttons for 'Export Sample CSV', 'Import CSV' (highlighted with a red arrow), and 'Export CSV'. Below these buttons are input fields for 'Retailer', 'From' (set to 2020), and 'Display' (set to 10). A table of visits is visible at the bottom, with columns for Name, Description, Visit Date, Merchandiser, Location, Retailer, Status, and Action.

Name	Description	Visit Date	Merchandiser	Location	Retailer	Status	Action
DOVE - Guardian Ang Mo Kio 3	planogram check and stock take	2020-09-07 09:00:00	Merchandiser 3 Powata	Guardian Ang Mo Kio Central 3	Guardian	To complete	

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17. 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 main content. Below the message is a blue "OK" button. The background interface includes a sidebar with navigation options like "Activities", "Actions", "Visits", "Calendar", "Reports", "Locations", "Merchandisers", and "Tasks". The main area shows a "Visits" section with filters for "Retailer", "Merchandiser", and "To Complete", a "From" date field set to "2020-09-07", a "Bulk Add Visit" button, and a "Display" dropdown set to "10". A table of visits is visible at the bottom, with columns for Name, Description, Visit Date, Merchandiser, Location, Retailer, Status, and Action.

<input type="checkbox"/>	Name	Description	Visit Date	Merchandiser	Location	Retailer	Status	Action
<input type="checkbox"/>	DOVE - Guardian Ang Mo Kio 3	planogram check and stock take	2020-09-07 09:00:00	Merchandiser 3 Powata	Guardian Ang Mo Kio Central 3	Guardian	To complete	
<input type="checkbox"/>	DOVE - Guardian 313@Somerset	merchandising visit	2020-09-07 09:00:00	Merchandiser 2 Powata	Guardian 313@Somerset	Guardian	To complete	

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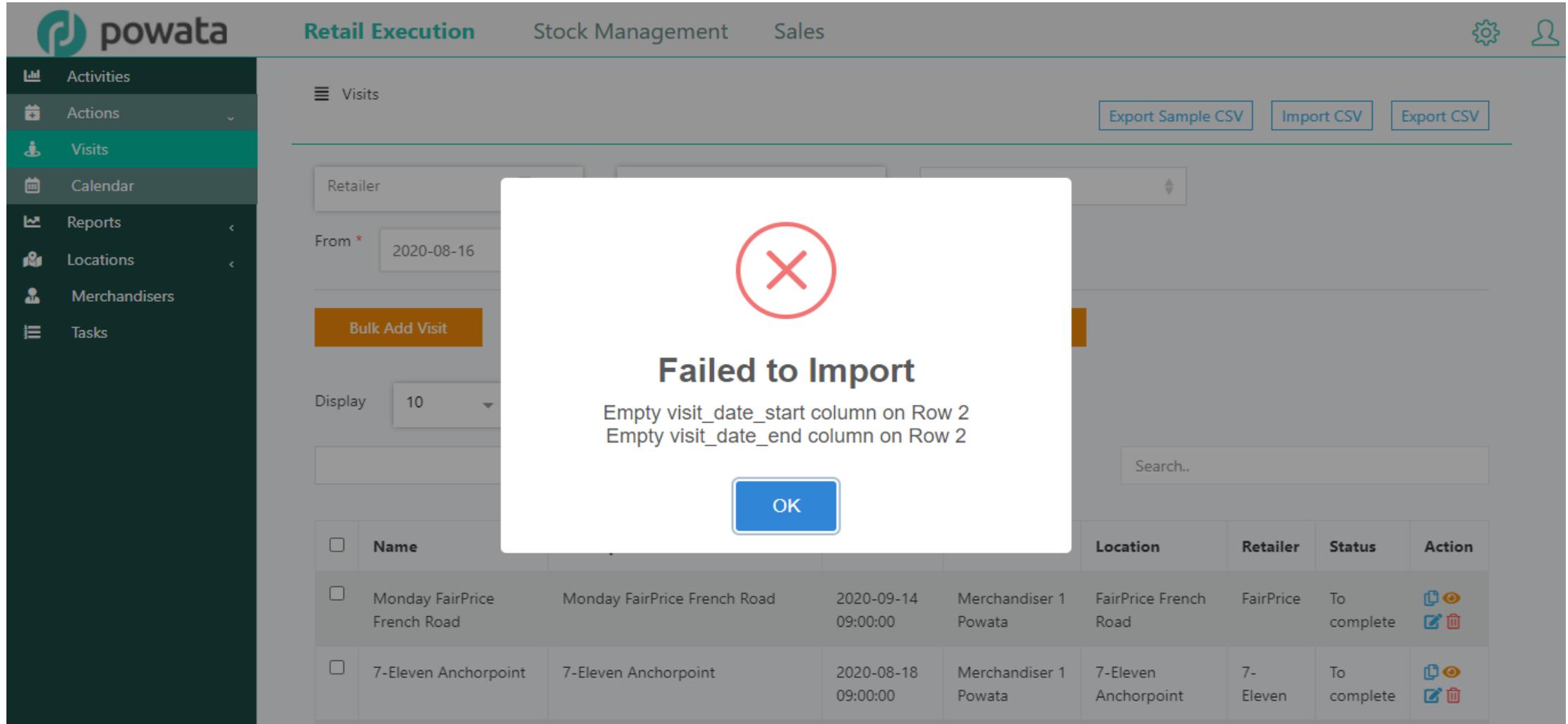
18. Otherwise, a message displays the field and row number the error came from.

The screenshot displays the Powata Retail Execution interface. A modal dialog box is centered on the screen, indicating a failed import. The dialog box contains a red 'X' icon, the title 'Failed to Import', and the following error messages: 'Empty visit_date_start column on Row 2' and 'Empty visit_date_end column on Row 2'. Below the error messages is an 'OK' button. The background interface shows a table of visits with the following columns: Name, Location, Retailer, Status, and Action. The table contains two rows of data.

<input type="checkbox"/>	Name	Location	Retailer	Status	Action
<input type="checkbox"/>	Monday FairPrice French Road	Monday FairPrice French Road	FairPrice	To complete	
<input type="checkbox"/>	7-Eleven Anchorpoint	7-Eleven Anchorpoint	7-Eleven	To complete	

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19. In case you got an error about the date format, please do the following:



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 following error messages: 'Empty visit_date_start column on Row 2' and 'Empty visit_date_end column on Row 2'. An 'OK' button is located at the bottom of the dialog. In the background, the 'Visits' section is visible, featuring a search bar, a 'Bulk Add Visit' button, and a table of visit records.

<input type="checkbox"/>	Name	Location	Retailer	Status	Action
<input type="checkbox"/>	Monday FairPrice French Road	Monday FairPrice French Road	Merchandiser 1 Powata	To complete	   
<input type="checkbox"/>	7-Eleven Anchorpoint	7-Eleven Anchorpoint	Merchandiser 1 Powata	To complete	   

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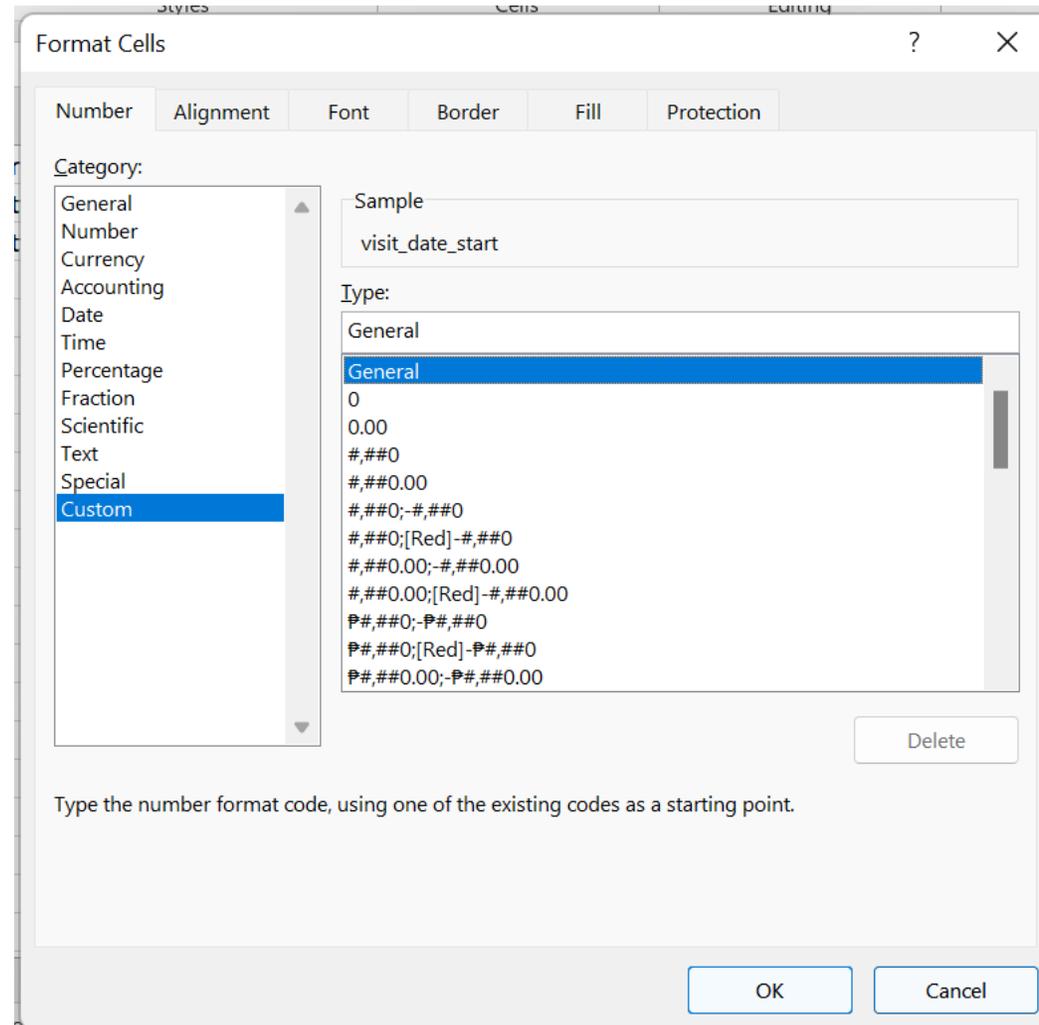
a) In the import file, highlight columns H and I

The screenshot shows the Microsoft Excel interface with the following data:

	B	C	D	E	F	G	H	I	
1	description	merchandise	client	retailer	location	department	visit_date_start	visit_date_end	task_name
2	weekly visit	Merchandise 1 Powata	Unilever	Guardian	Guardian 313@Somerset	Beauty and Personal Care	03/22/22	03/21/22	DOVE - Weekl
3	weekly visit	Merchandise 1 Powata	Unilever	Guardian	Guardian Bishan Junction 8	Beauty and Personal Care	03/22/22	03/22/22	DOVE - Weekl
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									

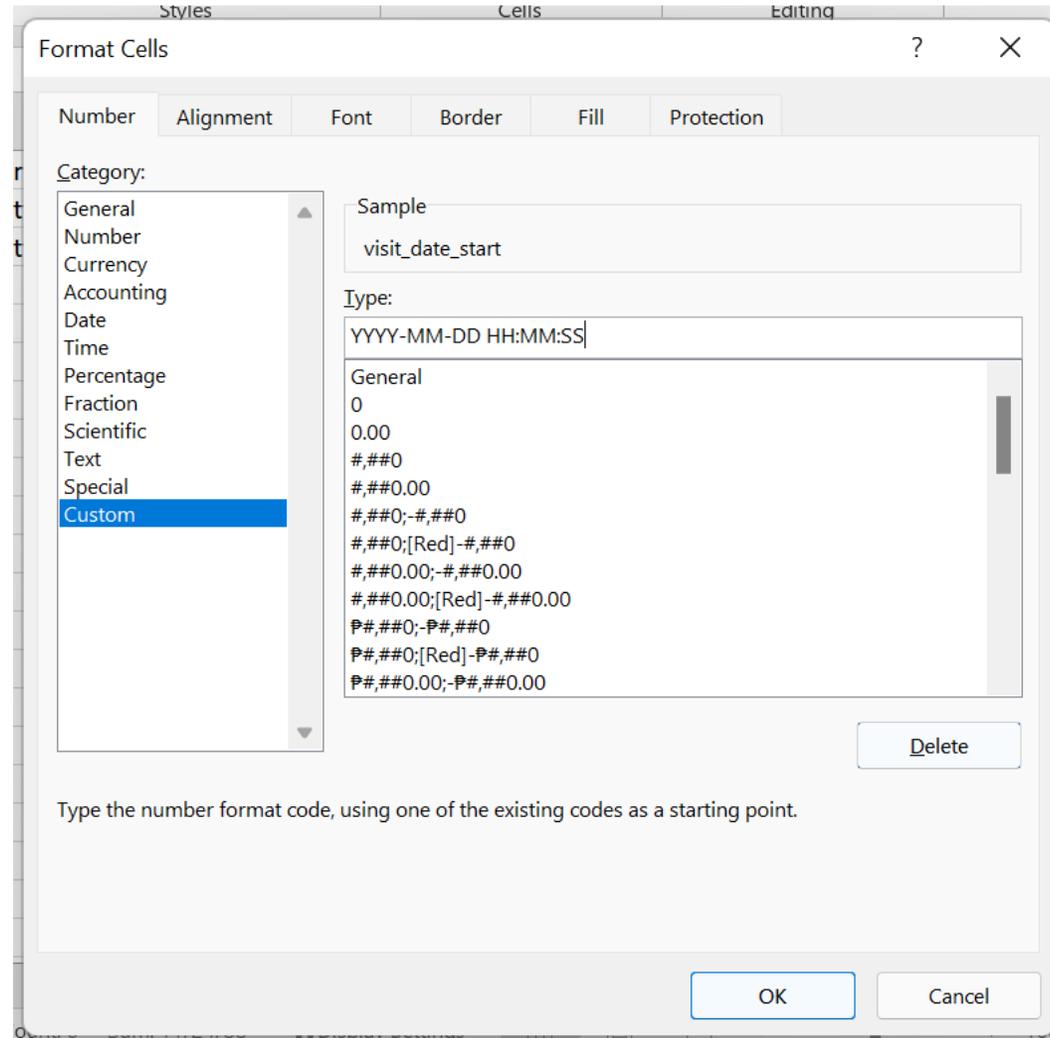
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b) Point the cursor anywhere on the highlight > right click > Format Cells > Custom > General



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c) On the text field, delete the word “General” and replace it with “YYYY-MM-DD HH:MM:SS”. Click OK



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d) The dates in the import file should appear like this

visit_date_start	visit_date_end
2022-03-22 09:00:00	2022-03-21 18:00:00
2022-03-22 09:00:00	2022-03-22 18:00:00

e) Save the file. It is recommended to save as Excel so that the date format is retained when you open the file again in the future.

