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Idea Forecast Amount import template Rules and Sample

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A downloadable PDF version is available at the bottom of the page together with the Excel import template.

Rules. (*Required fields are marked with a Red background colour***)**

Field Name	Description	Rules	Exception Handling	Values to be placed	Default Values	Field Type
Any Cell from Column B upwards and in row 1	This is the unique Idea code associated with the Idea. Each Idea will have an Idea code associated with it.	The Idea code must be the same as the Idea code. This is how the Idea and the Idea tracking information will be linked to each other. The Idea code will consist of a choice of up to 10 alphanumeric characters.	If the Idea code is not captured within the import sheet, the record will not be imported. It is imperative that the Idea code is captured.	N/A	N/A	Variable Character (10)
Any Cell In column A from row 2	This is the date (and time if applicable) of the Idea value captured.	This field will be captured in a Date and Time format.	If the date is not captured the Idea record will not be imported. It is important that the data is captured for the Idea. If the date is not attached to the date, the system will default the entry to midnight. If an Idea tracking value has two dates but does not have two times associated with it, the system will still import the data.	2013-11-14 15:43:30	Date and time of import	Date time (YYYY-MM-DD HH:MM:SS)
Any Cell from column B upwards and from row 2	These are the forecast amounts that will be added against the specified forecast date.	This should be numeric as it is an amount. Any numeric number, with almost 18 digits before the comma i.e. 12345.1233	Only numeric fields will be accepted. Non-numeric characters will cause the record to not be uploaded.	Any numeric number, with almost 18 digits before the comma i.e. 12345.1233	N/A	N/A

Sample.

	1008	A5039	2007
2021-03-01	905368947.52	900000	52,2456
2021-06-01	99.4568	110000	99,23
2021-09-01	56	300000	56,43
2021-12-01	100000	555555	32,9

	1008	A5039	2007