

## 4.1. General Requirements

Data import is the first step in creating a new project in Streamline. Streamline can import data from a number of sources starting from Excel files in different formats and ending with various databases.

When you first create a new project from your data source, Streamline automatically saves all your import settings and creates a link to the data source. It uses this link to synchronize the project with your data source as you click the **Update data** button.

Data that can be imported, the corresponding Streamline features and reports are shown in the table below.

	Data	Feature	Report
Sales data	Sales history	Demand forecasting and planning, unit-based ABC analysis.	Demand plan, forecast overrides report, forecast error report, ABC analysis report.
	Sales prices	Revenue forecasting.	Revenue plan, revenue-based KPIs in KPI report.
	Revenue history	Revenue-based ABC analysis.	ABC analysis report.
Inventory data	Basic information	Inventory planning, stockout and overstock analysis.	purchase plan, projected inventory levels report, expected stockouts and overstocks.
	In transition information	More precise inventory optimization.	More precise inventory reports.
	Pending sales orders		
	Inventory value or purchase prices	ABC analysis based on gross profit, COGS, or inventory value.	ABC analysis report.
Locations or Channels	Locations	Demand forecasting and inventory planning by location.	All of the reports can be viewed from the location view.
	Channels	Demand forecasting by channel or customer.	Demand plan by channel.
Kitted items		Disassembling of kitted items.	All of the reports are generated for kit's components.
Bill of materials		Material requirements planning.	Material requirements plan, production plan.
Product shelf life		Inventory optimization for products with a shelf life.	Replenishment plan is adjusted to account for the shelf life.

To get more precise inventory reports, we **strongly recommend** you to provide Streamline with the [orders-to-receive information](#) and [orders-to-ship information](#).

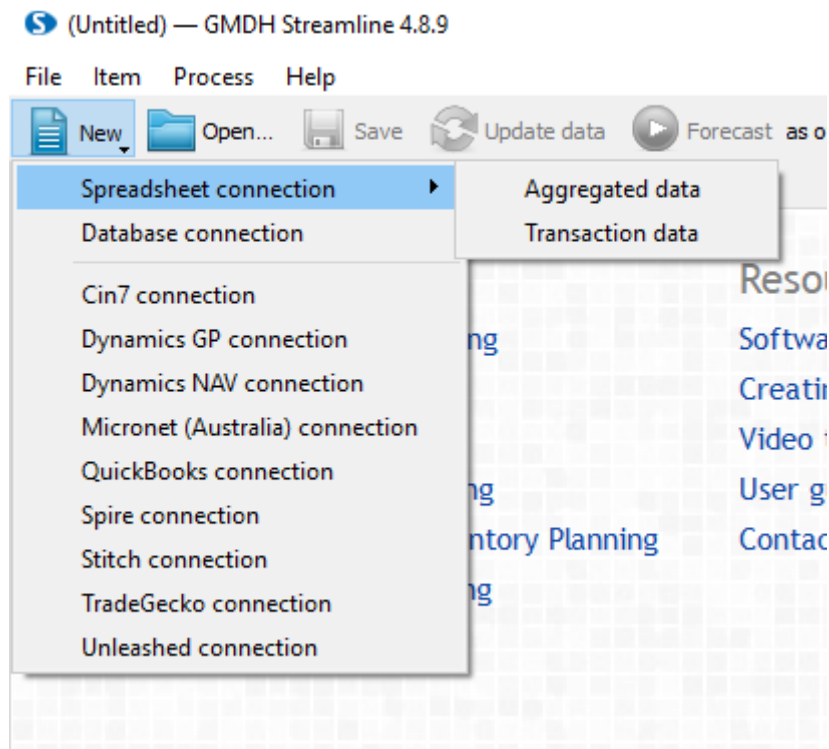
Streamline supports product and location or [channel](#) dimensions. Product and location dimensions allow all of the information imported and produced by Streamline (forecasts, plans, reports) to be seen from item and location views. Product and channel dimensions allow you to plan your demand by distributing channel or customer and plan the inventory on an item basis. Locations or channels must be, certainly, imported, to activate corresponding views. In these cases, the forecasted entity is a unique product-location or product-channel pair which is called **planning item**.

Streamline can aggregate imported data in given periods (days, weeks, and months) depending on

your forecasting and planning needs. For example, if you want to see monthly forecasts, aggregate the data by month.

To get accurate forecasts, we recommend you to provide Streamline with *at least 24 months* of sales history. Streamline implements special approaches to provide accurate enough forecasts in situations of forecasting a new product when the history is very short (three or two periods) or is totally absent.

To discover all the Streamline's data connections, click the **New** button on the toolbar.



All Streamline's connections can be divided into three categories:

- *Spreadsheet connections*. These are designed to import data from Excel files and CSV files in certain formats.
- *Database connection*. This connection is the most generic and powerful. It allows you to pull data from any database that has an ODBC driver.
- *3rd party system connections*. These connections were specifically designed to work with a certain accounting or inventory management system. They have a simple user interface and require minimum efforts to import the data into Streamline.

## Spreadsheet Connections

There are two spreadsheet connections in Streamline, the **Aggregated data** and **Transaction data**. Any of them can import data from Excel and CSV files. The **Aggregated data** requires the data (sales, on-hand, revenue histories) to be aggregated in certain periods prior to the import. Unlike **Transaction data** can import raw transactions and makes the aggregation while the data is being imported.

Since CSV files do not have multiple sheets, they limit the information that can be imported.

The [Aggregated data connection](#) comes in handy if you run (or can format) your sales and inventory information in a single Excel spreadsheet or CSV file. It is intended for a common format of manual bookkeeping. It has the weakest import capabilities and can import the least amount of data comparing to the **Transaction data** connection or the **Database connection**.

If you keep all the information in a database, ERP, accounting or inventory management system and have an ability to make an extract of inventory movement transactions as an Excel or CSV file, use the [Transaction data connection](#).

## Database Connection

If your system does not have an ability to export the information, you can use [Database connection](#) that can import entire spectrum of data types directly from the system's database into Streamline. It allows importing full spectrum of data that Streamline understands and has the strongest import capabilities. In this case, SQL-queries knowledge is required.

## 3rd Party System Connections

Streamline has several integrations with different accounting or inventory management systems. The integrations have their own connections that import all necessary data to make forecasts and procurement plans in Streamline.

There are two types of integrations, one-directional integration and bi-directional integration. The difference is that bi-directional integration additionally allows exporting the recommended replenishment information as purchase orders into the system back.

Bi-directional integrations are the following:

- [QuickBooks connection](#)
- [Dynamics NAV connection](#)
- [Spire connection](#)
- [TradeGecko connection](#)
- [Unleashed connection](#)
- [Cin7 connection](#)

One-directional integrations are:

- [Shopify connection](#)
- [Stitch connection](#)
- [Micronet \(Australia\) connection](#)
- [Dynamics GP connection](#)

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[Next: Aggregated spreadsheets](#)

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