



OptimMerchandising – How to Create Tasks

1. Go to app.optimmerchandising.com and log-in with the manager or supervisor credentials.
2. In the left navigation bar, click on the Tasks tab.

The screenshot shows the 'Tasks' page in the OptimMerchandising application. The left navigation bar is dark green with the 'Tasks' tab highlighted in a lighter green. A red arrow points to this tab. The main content area has a white background with a header 'Tasks' and a search bar. Below the search bar is a 'Display 10 records' dropdown. The main content is a table with the following data:

Name	Client	Description	Type	Actions
Rex Dashboard	Powata		smart task	
Rex Actions	Powata		smart task	
Rex reports --> Visit report	Powata		smart task	
Rex reports --> Photo gallery	Powata		smart task	
Rex reports --> Store audit + Task report	Powata		smart task	
Rex report --> Historical & Unplanned	Powata		smart task	



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3. To create a new task, click on the Add Task button.

The screenshot shows the 'Tasks' page in the OptimMerchandising application. The page includes a search bar, filters for 'Task Type' and 'Client', and a table of existing tasks. A red arrow points to the 'Add Task' button.

Search.. Select Task Type Select Client **Add Task**

Display 10 records

Name	Client	Description	Type	Actions
Rex Dashboard	Powata		smart task	
Rex Actions	Powata		smart task	
Rex reports --> Visit report	Powata		smart task	
Rex reports --> Photo gallery	Powata		smart task	
Rex reports --> Store audit + Task report	Powata		smart task	
Rex report --> Historical & Unplanned	Powata		smart task	



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4. In the add task form, type the name of the task.

The screenshot shows the 'Add Task' form in the Powata application. The 'Name' field is highlighted with a red box and contains the text 'Merchandising Audit'. The 'Task Type' dropdown is set to 'Smart Task'. The 'Client' dropdown is set to 'Select one' with a red error message 'client is required' below it. The 'Description' field is empty. At the bottom, there is a table for 'Tasks Items' with a red error message 'Task Item is required'.

Type	Question	Required	Actions
No task items added			



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5. Select the task type – smart tasks (for creating generic questionnaire), planogram check, or stock take.

powata Retail Execution Stock Management Sales

Add Task

Name *
Merchandising Audit

Client *
Select one
client is required

Description

Task Type *
Smart Task
Smart Task
Planogram Check
Stock take

Tasks Items *
Task Item is required

Type	Question	Required	Actions
No task item added			



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6. Select the client.

The screenshot shows the 'Add Task' form in the Powata application. The form includes fields for 'Name' (Merchandising Audit), 'Task Type' (Smart Task), and 'Client'. The 'Client' dropdown menu is open, showing a list of clients: Clipan Finance, Goola, Amaris Hotel, GSD, Razer, and Unilever. The 'Unilever' option is highlighted in green, and a red arrow points to it. Below the dropdown, a red error message reads 'Task Item is required'. At the bottom of the form, there is a table with columns for 'Type', 'Question', 'Required', and 'Actions'. The table is currently empty, with the text 'No task item added' displayed below it.

Type	Question	Required	Actions
No task item added			



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7. To add the task items, click on the Add Task Item button.

powata Retail Execution Stock Management Sales

Description

Tasks Items *
Task Item is required

Type	Question	Required	Actions
No task item added.			

Submit Add Task Item



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8. Type the task item in the box.

The screenshot shows a software interface with a modal dialog box titled "Add Task Item". The dialog has a blue header bar with a close button (X) in the top right corner. Below the header, there is a text input field labeled "Question *" containing the text "Is the price correct?". A red rectangular box highlights this input field. To the right of the text in the input field is a green circular icon with a white 'G' inside. Below the input field, there are two labels: "Type" and "Required". Under "Type" is a dropdown menu with a downward arrow. Under "Required" is a checkbox. At the bottom left of the dialog is an orange "Submit" button. The background of the application shows a navigation bar with the following items: "Retail Execution", "Stock Management", and "Sales".



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9. Select the proper answer type: text, photo, number, selection, tick (yes/no)

The screenshot shows a dialog box titled "Add Task Item" with a close button (X) in the top right corner. The dialog contains the following fields:

- Question ***: A text input field containing "Is the price correct?". A green circular icon with a white 'G' is visible on the right side of the field.
- Type ***: A dropdown menu with a list of options: ---, Text, Photo, Number, Selection, and Tick (Yes/No). This dropdown is highlighted with a red rectangular border.
- Required**: A checkbox that is currently unchecked.



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10. You may also set each task item as required or not.

A screenshot of a software interface showing a dialog box titled "Add Task Item". The dialog has a blue header bar with a close button (X) in the top right corner. Below the header, there are two main input fields: "Question *" and "Type *". The "Question" field is a text area containing the word "Comments" and a green circular refresh icon on the right. The "Type" field is a dropdown menu currently showing "Text". To the right of the "Type" field is a toggle switch labeled "Required", which is currently turned on (the blue bar is on the right). This "Required" toggle is highlighted with a red rectangular box. At the bottom left of the dialog is an orange "Submit" button. The background of the application window is partially visible, showing tabs for "Retail Execution", "Stock Management", and "Sales".



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11. For selection or multiple choice, there are 2 modes: single or multiple

Add Task Item

Question *

Shelf Placement

Type *

Selection

Required

Selection Mode *

Single Value

Single Value

Multiple Value

Weight	Value	Label	

+ Add Row



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12. Under the Weight column, you assign a numerical equivalent to the values which are then summed up and displayed as scores in the reports.

Selection Mode *
Multiple Value

Item Selections*

Weight	Value	Label	
4	Eye	Eye	
3	Middle	Middle	
2	Top	Top	
1	Bottom	Bottom	

+ Add Row

Note: Labels are displayed in the dropdown in the mobile application. Values are displayed in the reports (graphs and csv exports). Scores are used to compute the overall visit score. Label is optional so if you don't provide it the value will be also use as the label.

Submit



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13. Under the Value column, you assign in here the value to be displayed in the reports.

Selection Mode *
Multiple Value

Item Selections*

Weight	Value	Label	
4	Eye	Eye	
3	Middle	Middle	
2	Top	Top	
1	Bottom	Bottom	

+ Add Row

Note: Labels are displayed in the dropdown in the mobile application. Values are displayed in the reports (graphs and csv exports). Scores are used to compute the overall visit score. Label is optional so if you don't provide it the value will be also use as the label.

Submit



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14. Under the Label column, you assign in here the label for the value as displayed in the app. For example, the labels can be in native language while the values can be in English.

Selection Mode *
Multiple Value

Item Selections*

Weight	Value	Label	
4	Eye	Eye	
3	Middle	Middle	
2	Top	Top	
1	Bottom	Bottom	

+ Add Row

Note: Labels are displayed in the dropdown in the mobile application. Values are displayed in the reports (graphs and csv exports). Scores are used to compute the overall visit score. Label is optional so if you don't provide it the value will be also use as the label.

Submit



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15. When finished adding all the task items, click on the Submit button.

The screenshot shows the Powata Retail Execution interface. The top navigation bar includes the Powata logo, the text "Retail Execution", and menu items for "Stock Management" and "Sales". On the right side of the navigation bar are icons for settings and user profile. The main content area is titled "Tasks Items *" and contains a table with the following data:

Type	Question	Required	Actions
tick	Is the price correct?	No	
photo	Take a photo	Yes	
number	Quantity of items on display shelf	No	
selection	Shelf Placement	No	
text	Comments	No	

Below the table, there is a blue "Add Task Item" button on the right and an orange "Submit" button on the left. A large red arrow points to the "Submit" button, indicating the final step in the process.











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16. The new task is added to the list. Under the Actions column, you can view, edit, delete or use the duplicate function to create a similar task.

IMPORTANT: In case you want to make changes to a task wherein that task already have reports generated from completed visits, we recommend that you create a new task instead (with a different task name) to preserve the old reports. Old reports would no longer be available once you make changes to a task.

The screenshot shows the Powata Retail Execution interface. The top navigation bar includes the Powata logo, 'Retail Execution', 'Stock Management', and 'Sales'. A left sidebar contains menu items: Activities, Actions, Reports, Locations, Merchandisers, and Tasks (highlighted). The main content area is titled 'Tasks' and features a search bar, a 'Select Task Type' dropdown menu (set to 'Unilever'), and an 'Add Task' button. Below this is a 'Display 10 records' control. A table lists tasks with columns for Name, Client, Description, Type, and Actions. The Actions column is highlighted with a red box and contains icons for view, edit, delete, and duplicate.

Name	Client	Description	Type	Actions
DOVE - Planogram Check	Unilever		planogram check	   
DOVE - Stock Take	Unilever		stock take	   
DOVE - Weekly Visit	Unilever		smart task	