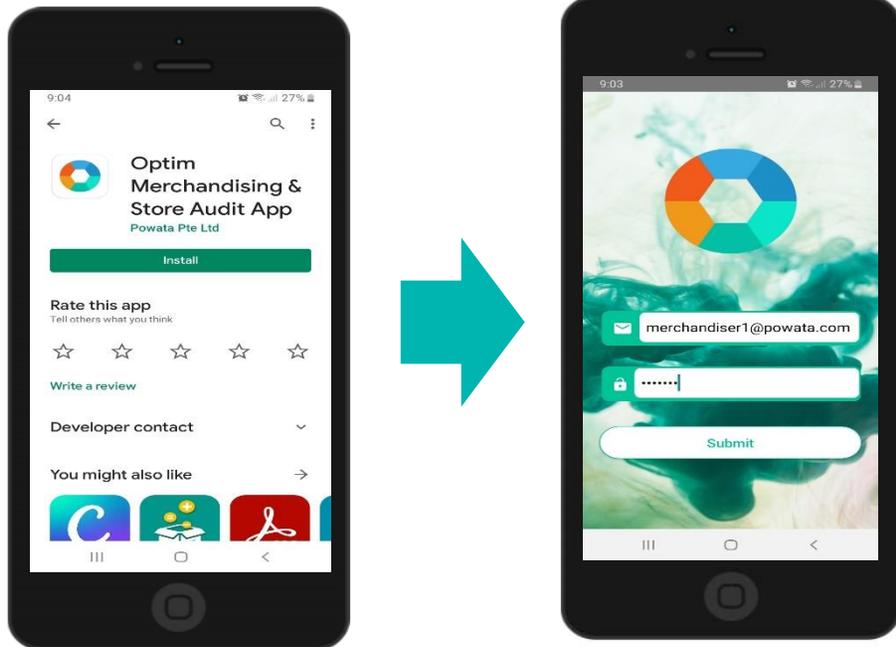


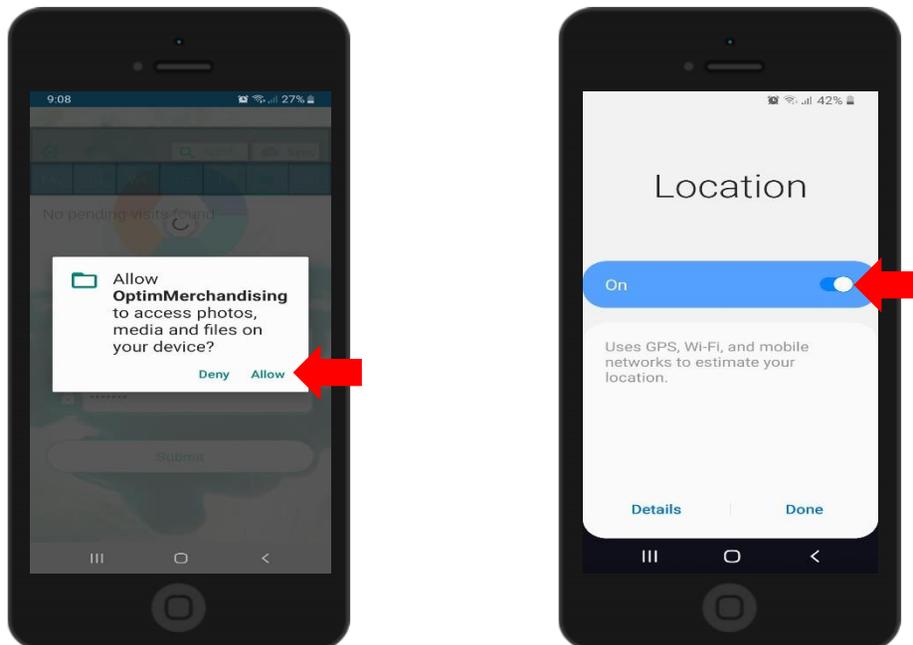


OptimMerchandising Mobile Application Tutorial (Retail Execution)

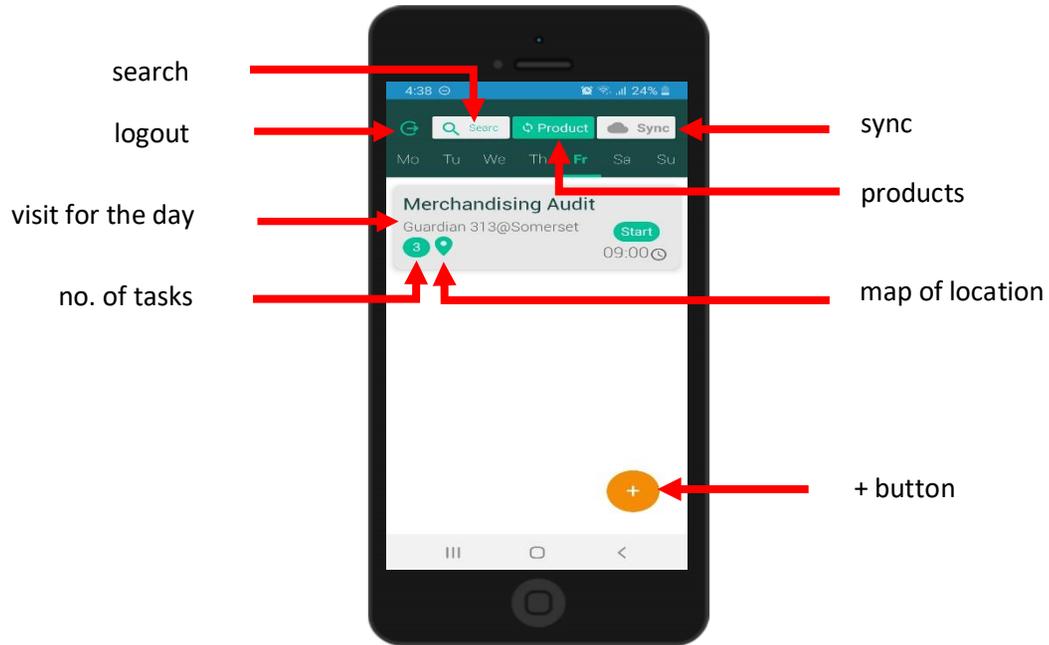
1. Download OptimMerchandising & Store Audit App from [Google Play](#) or [App Store](#) onto your device. Log in with the Merchandiser credentials.



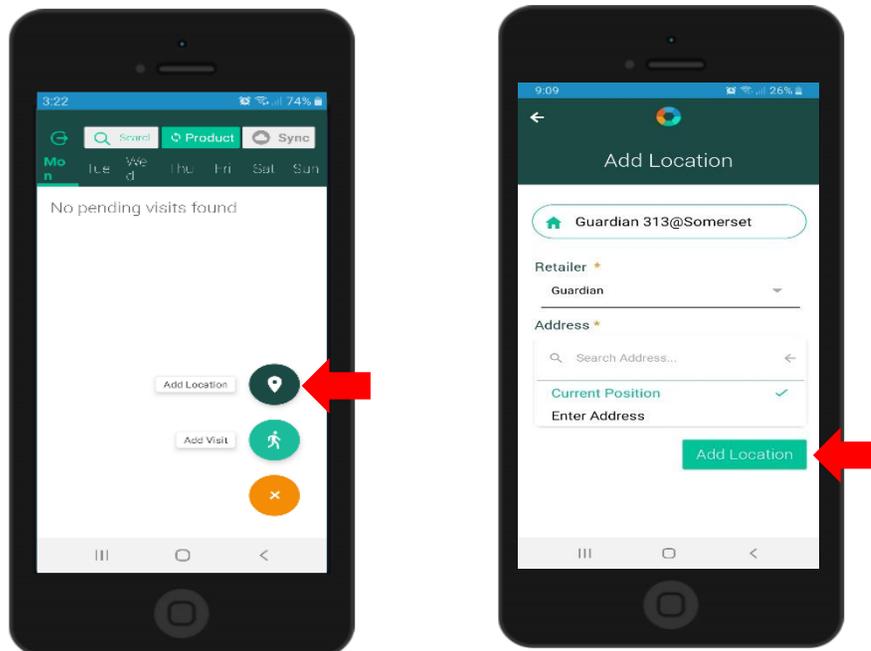
Allow all permissions requested by the app. Also, enable the location permission on your phone settings for geotagging to work properly.



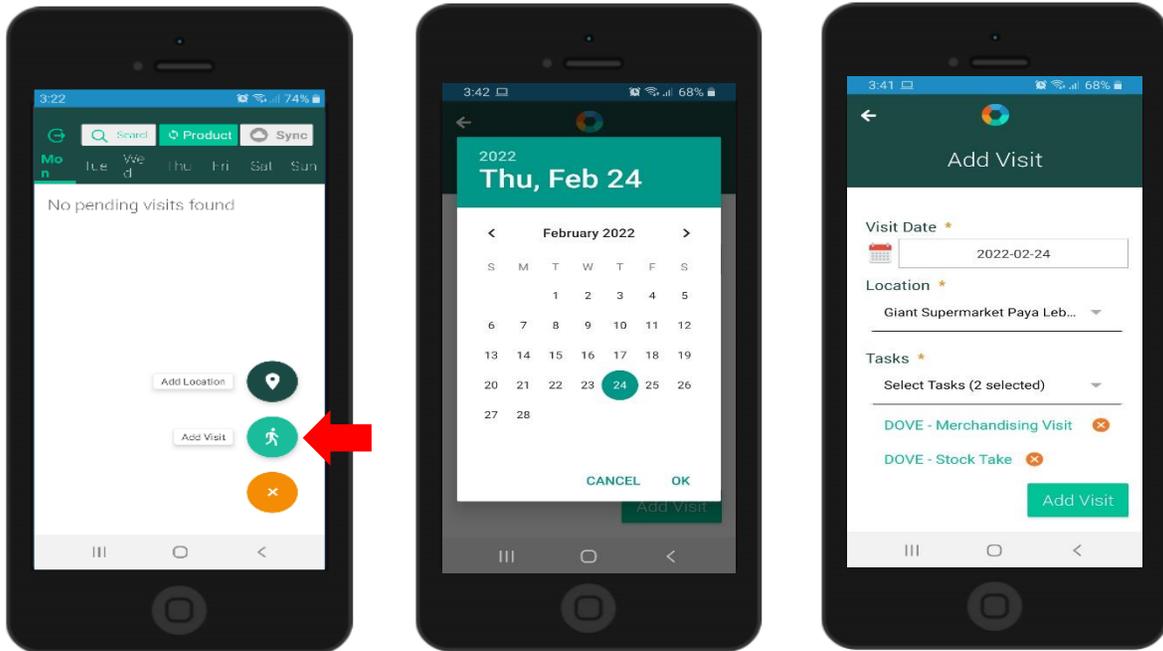
You'll be taken to the weekly dashboard, where you can see your schedule for the current week. Only the visits assigned to you would be displayed on the screen; hence, you won't see the visits of other merchandisers. At this point, you may choose to turn off your internet connection as the app can work offline.



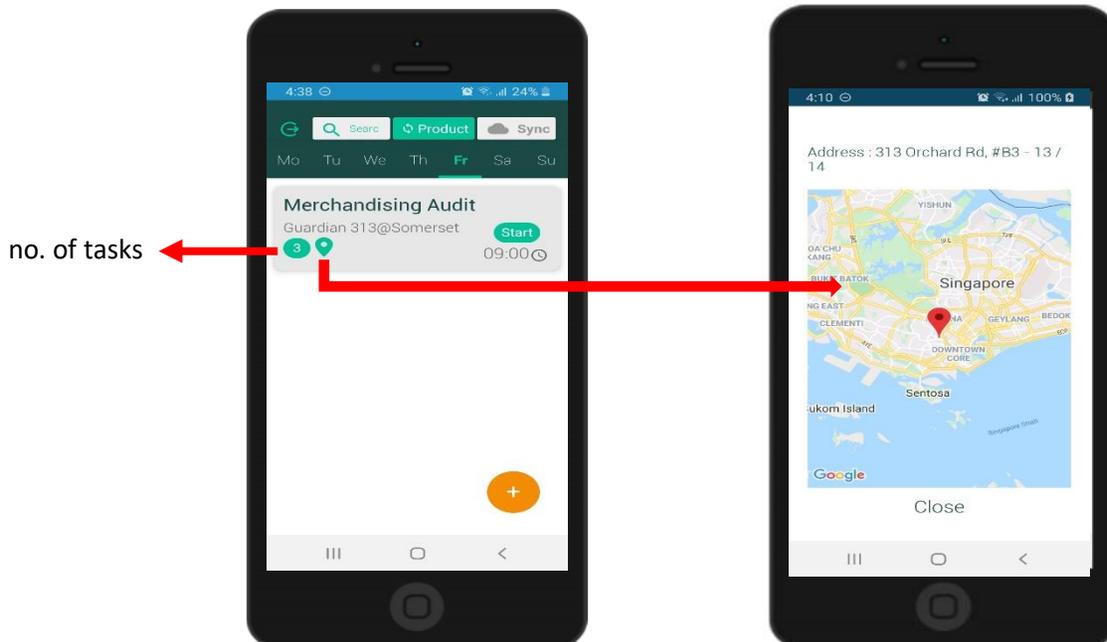
2. Create a location (available only when online). Create a new location by clicking on the + button and select Add Location. Type the location name and select the retailer. For the address, you may choose "Current Position" which will automatically get the address based on the GPS coordinates of your current position or "Enter Address" which will require you to manually input the location address. Then click on Add Location.



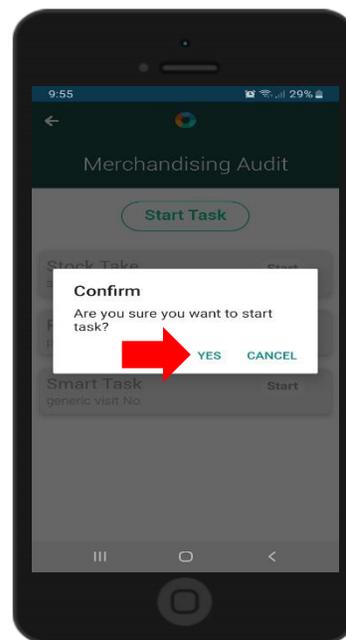
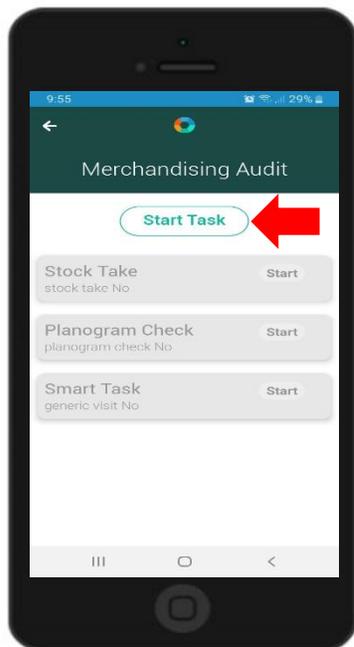
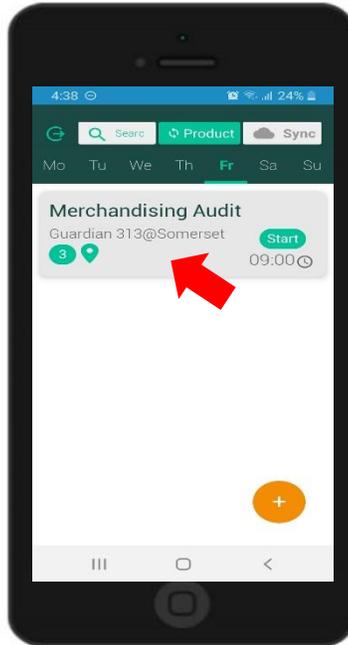
3. Create a visit (available only when online). Create a new visit directly on the app. Click the + button and select Add Visit. Choose a date from the calendar, location, and tasks from the drop-down list. Select as many tasks as needed. Then click on Add Visit. As mentioned earlier, the dashboard displays only the visits within the current week. If the visit you created is outside of that week, it won't be displayed on the screen but only when the week it is in has arrived.



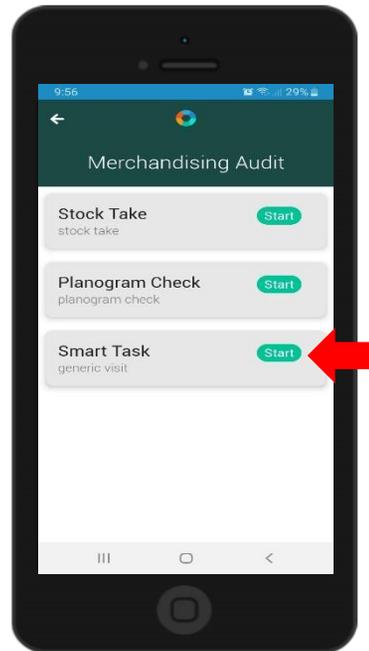
You'll be directed back to the weekly dashboard where you'll see the visit that you created. The task icon tells the number of tasks a visit has. To view the map of the location, click on the map icon.



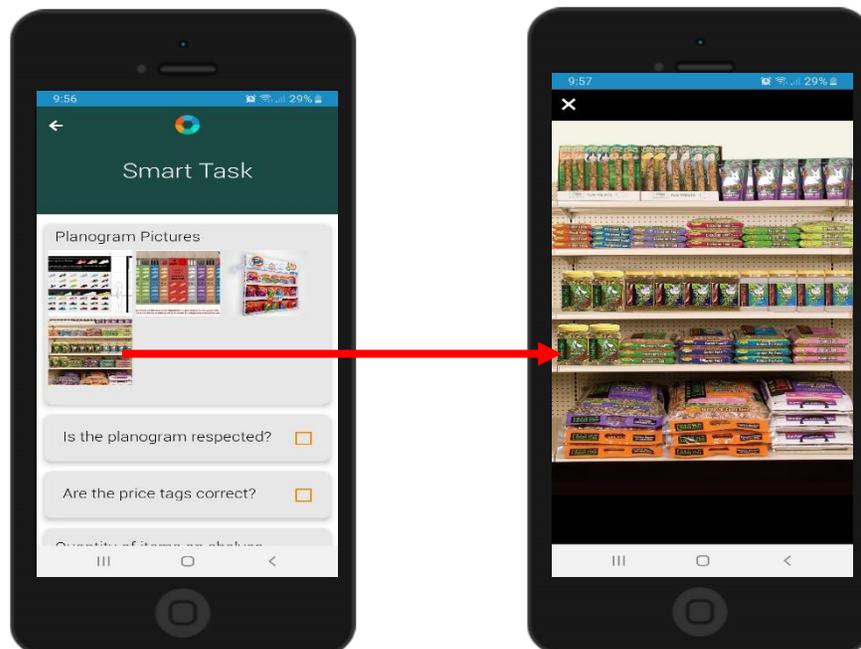
4. Conduct the visit. To open the visit, simply tap it on the screen. You will see all the tasks it contains. Then, click on the Start Task button. This retrieves the GPS coordinates of your current position. You won't be able to work on any tasks without tapping first this button.



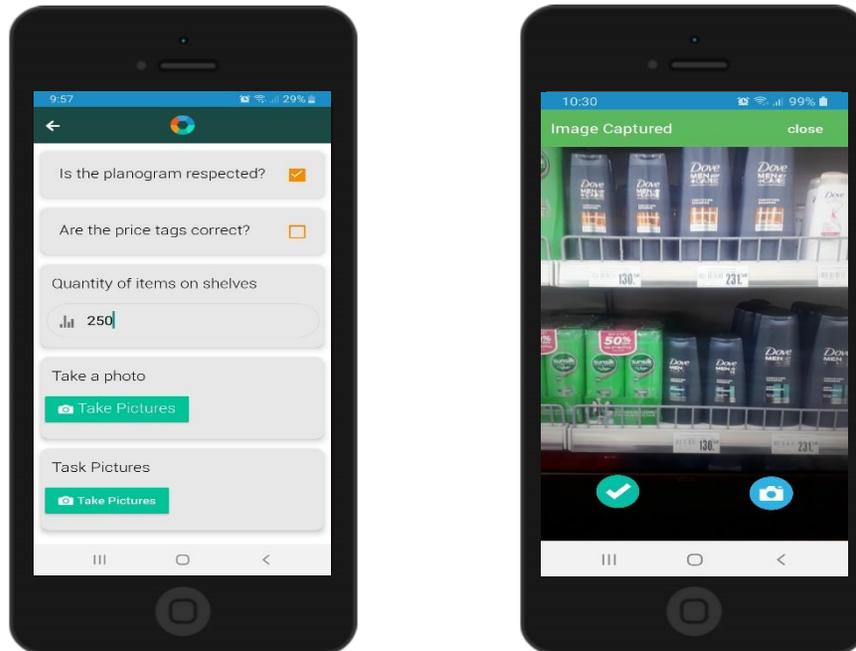
Thereafter, click on the Start buttons to work on the tasks.



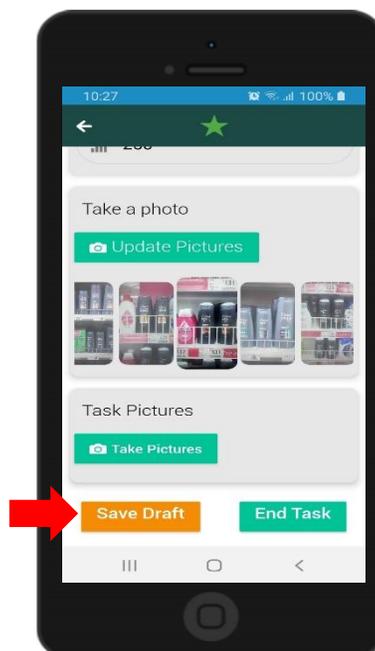
In a smart task, you will see all the planogram pictures assigned to a location. Tap on the picture to enlarge. To assign pictures to a location, on the platform go to Settings > Location Settings > Planogram Pictures > Add Planogram > Assign Planogram to Locations.



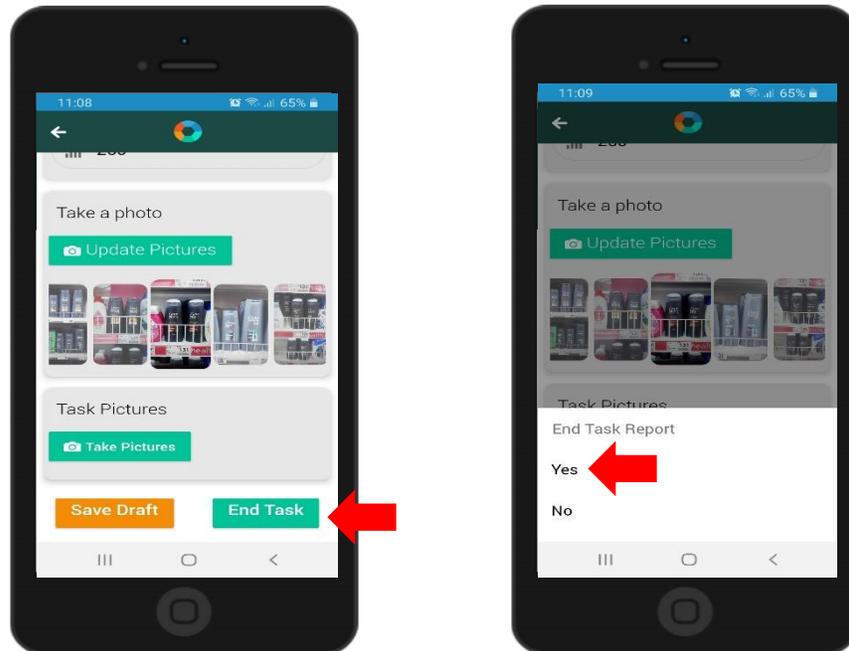
Perform the task items such as tick the box if yes (leave it blank if no), type texts and numbers, choose from selections (multiple choice) and take photos. When taking photos, please wait until the validation message “Image Captured” appears before turning off the camera or taking another picture.



If you need to stop momentarily, click on the Save Draft button to save your work. However, do not log out of the app because all data will be erased. To return to the tasks, simply click on it to continue.



5. End Task. When you finished all the task items, click on the End Task button to conclude the task. Please note that once you end a task, you won't be able to go back and make changes to your work.

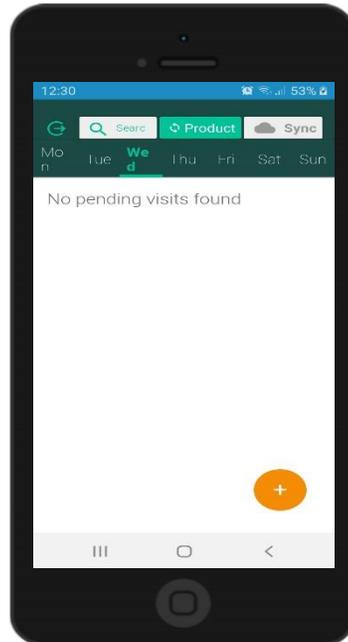


6. Sync the data to the backend. When you end a task, you'll see that the Sync button turns green in color which indicates that there are data waiting to be synced. Tap it to start the sync process (needs internet connection to perform this). Once the sync finishes, the button will revert to color gray.

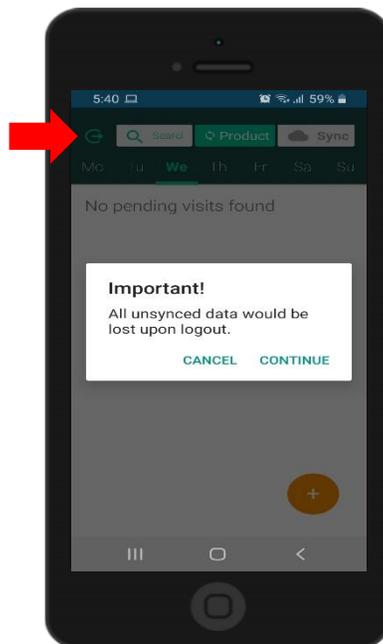




When all the tasks in a visit have been completed and synced, the visit disappears from the screen.



When you tap the log out button, a message appears to warn you that all unsynced data would be lost upon logout. Thus, make sure to sync your work to the platform before you log out.





7. Troubleshooting

	Error	Cause	Solution
1	Unable to log in	Wrong username or password	Check if the credentials that you entered are correct.
		No internet connection	Connect to a Wi-Fi signal or data connection. Ensure that your mobile is not in airplane mode.
2	Merchandiser can't create visits or add locations on the app.	Permission is disabled on the platform.	Go to Settings > Company Settings > turn on toggle to allow merchandisers to create visits and locations on the app.
3	No visit schedule can be found on the weekly dashboard.	No visit was scheduled on the platform.	Create a visit on the platform or directly on the app.
		Visit is assigned to another Merchandiser.	Check in the Visits or Calendar tab whom the visit was assigned.
4	When adding visits on the app, no locations and tasks appear in the list.	Merchandiser is not assigned to client.	Assign Merchandiser to Client. Go to Settings > Location Settings > Client > edit > Add Merchandiser).
5	Start buttons are unresponsive.	Start Task button is not yet activated.	Tap on the Start Task button to enable working on tasks.
6	Additional Information		- For Android mobile phones, the minimum OS version supported is Android 4.1. - Make sure to have at least 50 mb available internal storage in your phone.

END OF TUTORIAL