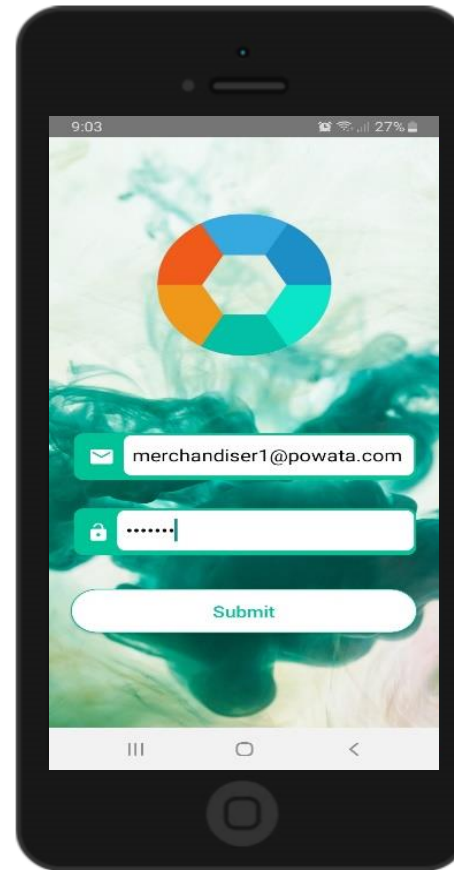
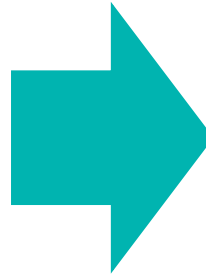
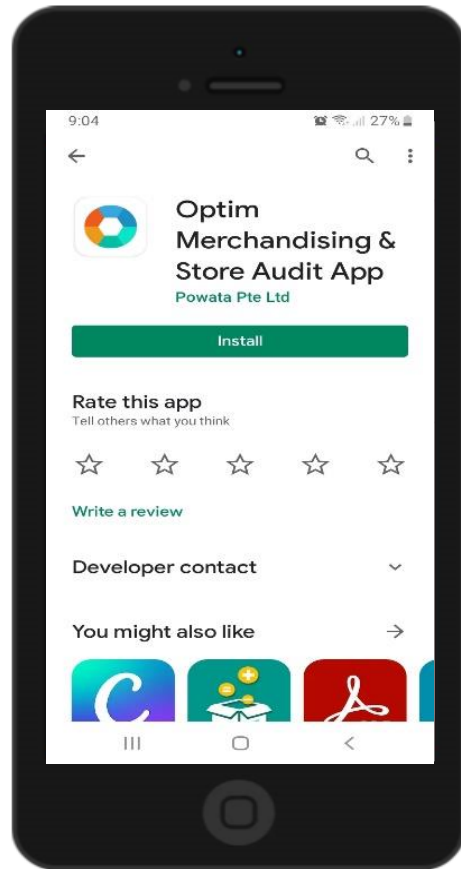




# Optim Merchandising – Mobile Application Tutorial (Retail Execution)

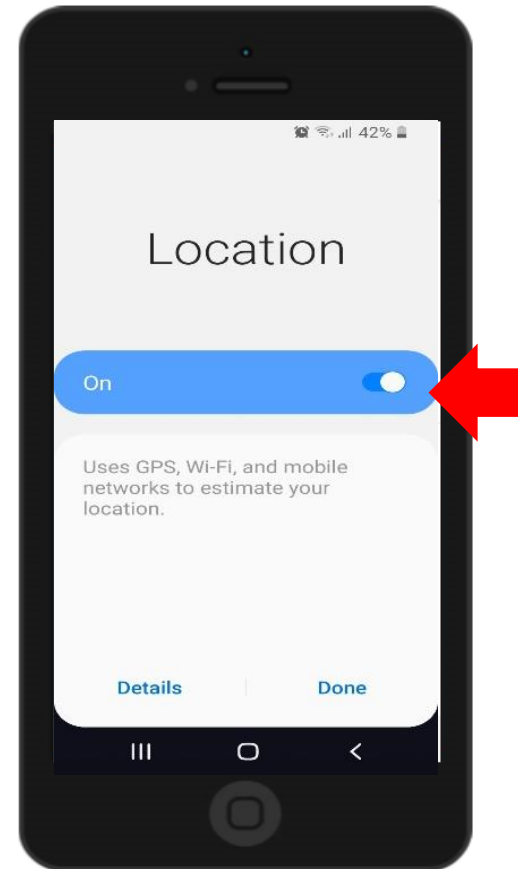
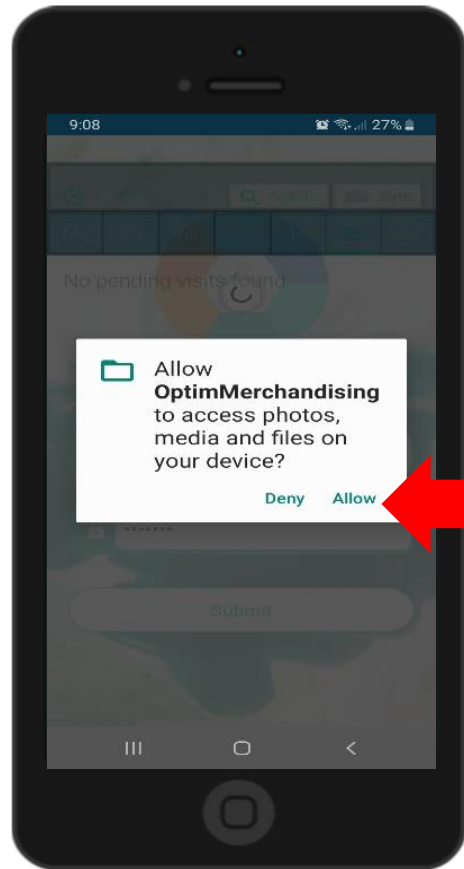
1. Download Optim Merchandising & Store Audit App from Google Play or App Store onto your device. Log in with the Merchandiser credentials.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

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

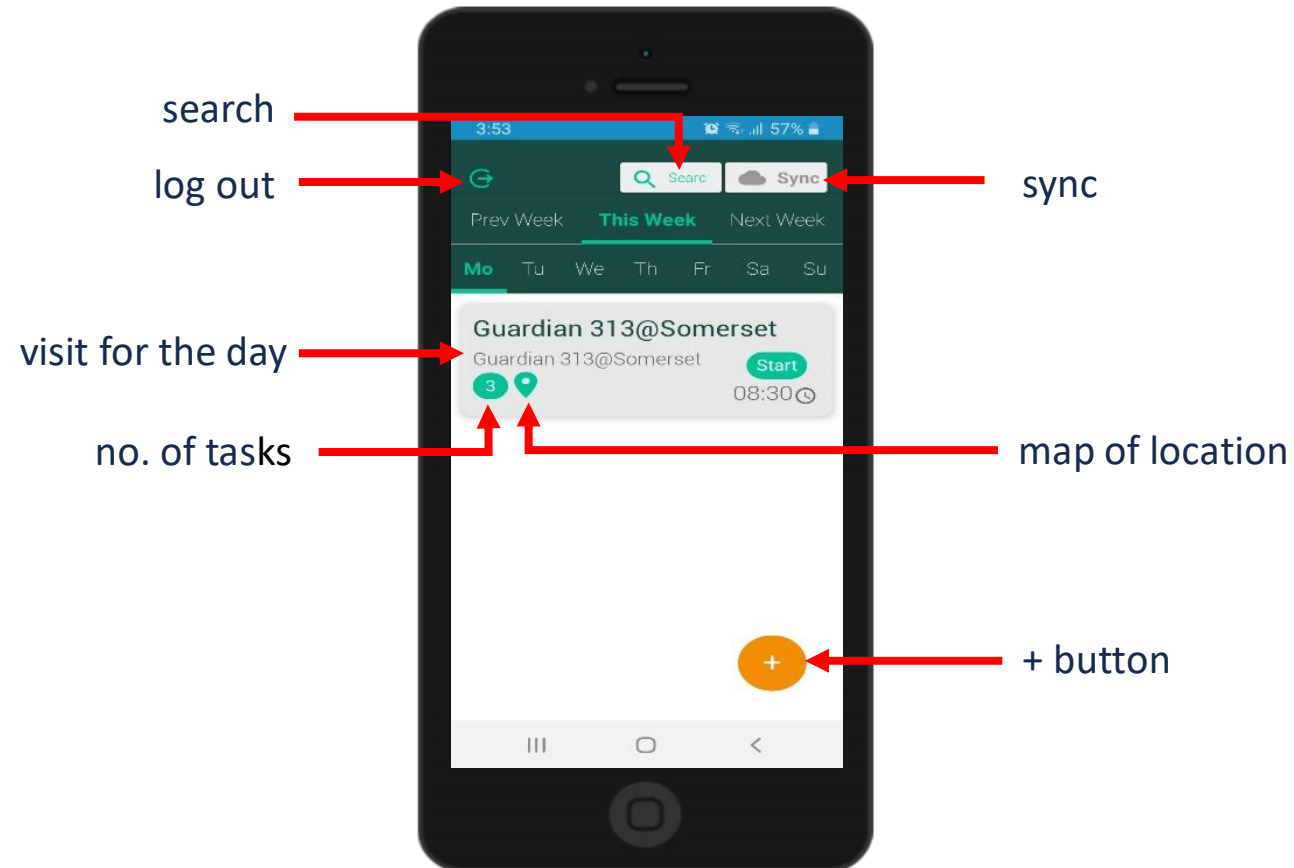




## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

You'll be redirected to your schedule for the day. On the dashboard, you'll see your schedule for the previous, current and the week ahead. You can open and perform any of the visits within this period. Only the visits assigned to you would be displayed on the screen; hence, you won't see the visits of other merchandisers.

Once your schedule has finished loading, you may choose to turn off your internet connection as the app can work offline.

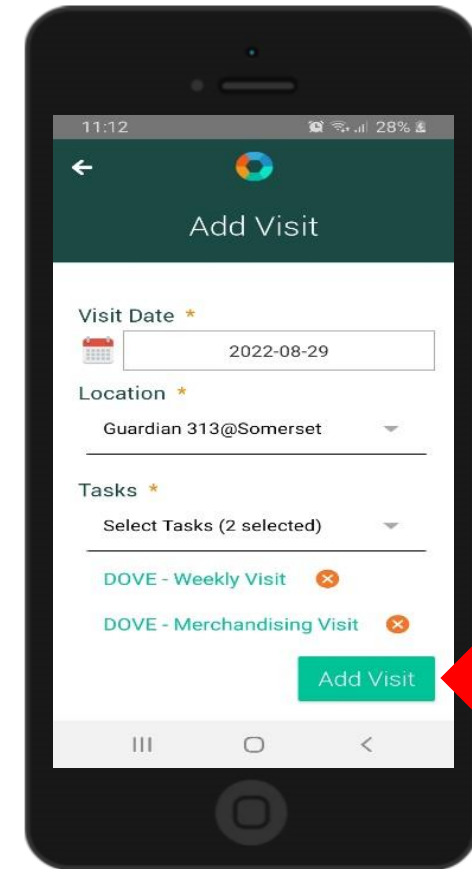
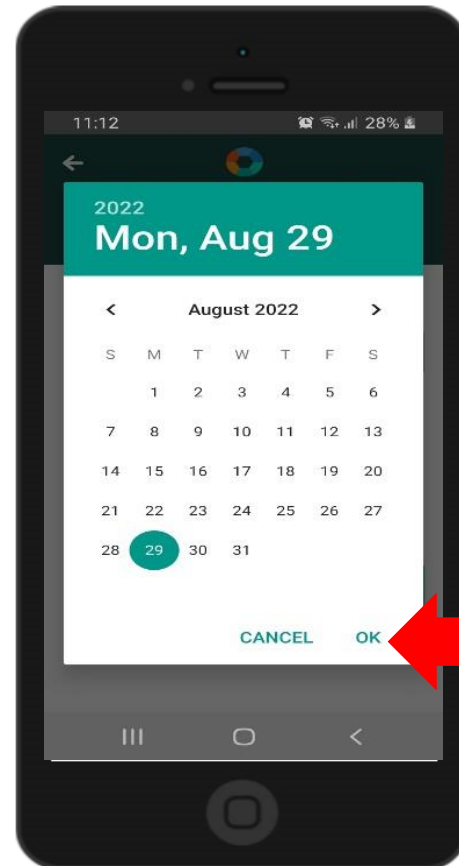
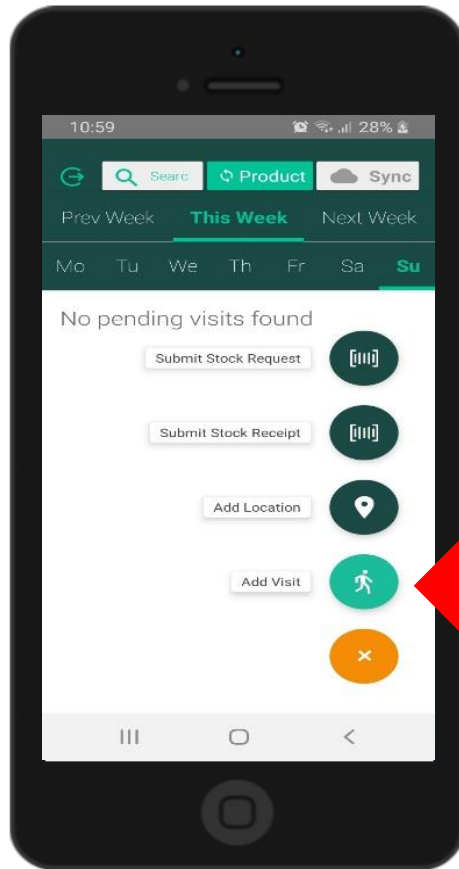




## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

**2. Create a visit (only available when online).** Create a new visit directly on the app. Tap 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 tap Add Visit.

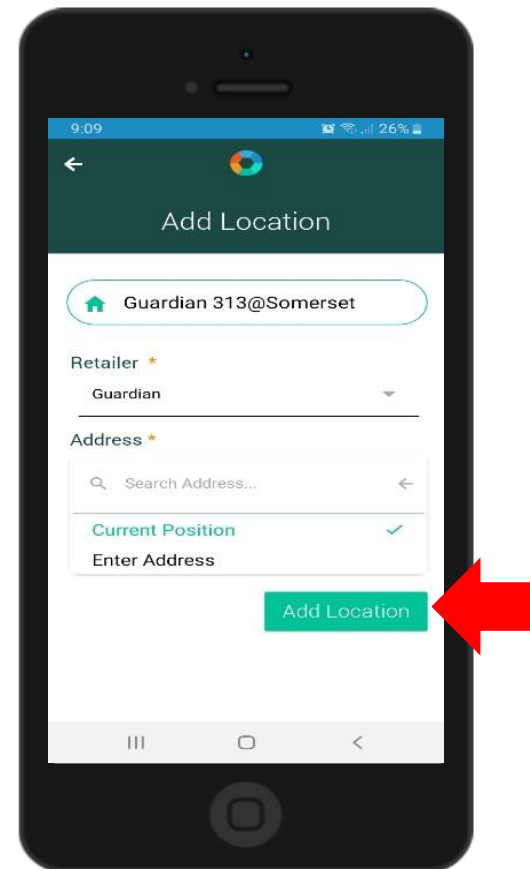
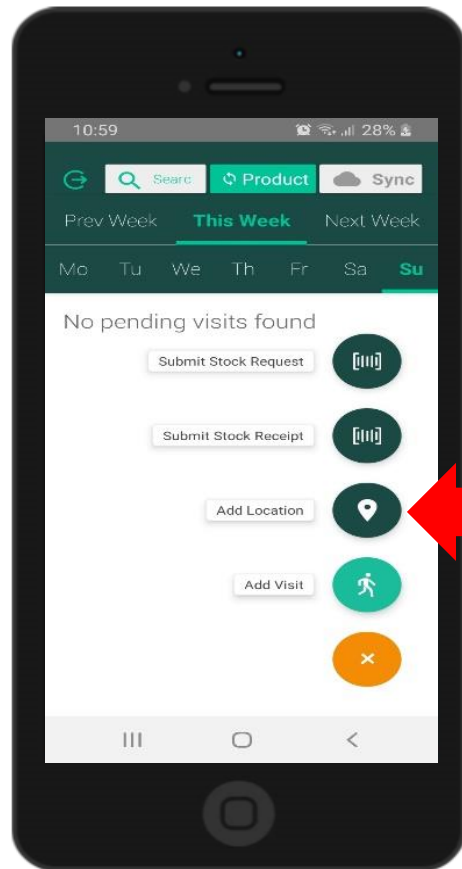
As mentioned earlier, the dashboard displays the visits for the previous, current, and the week ahead. If the visit you created is outside of these weeks, it won't be displayed on the screen until the week it is in has arrived.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

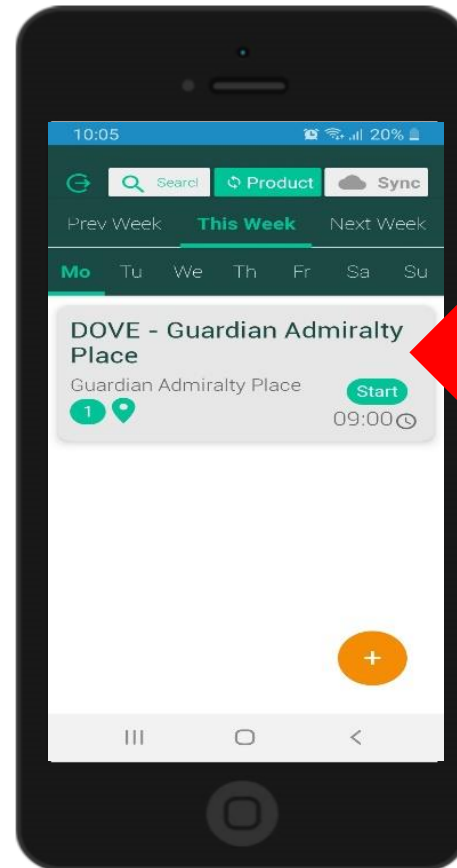
**3. Create a location (only available when online).** Create a new location by tapping the + button and select Add Location. Type the location name and select the retailer. For the address, you may choose “Current Position” which will automatically get the address based on the GPS coordinates of your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





## Optim Merchandising – Mobile Application Tutorial (Retail Execution)

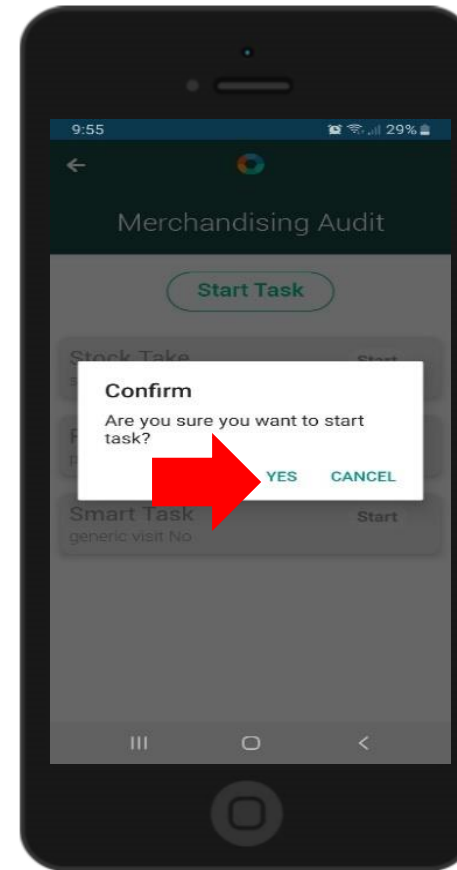
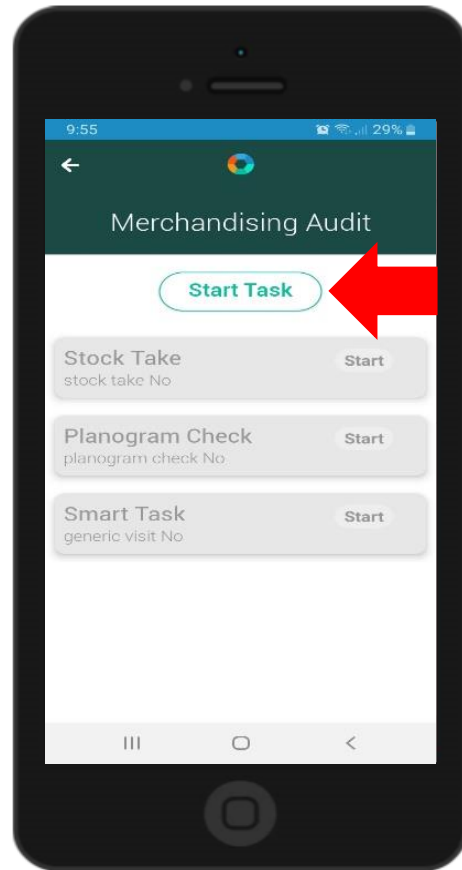
4. **Conduct the visit.** To open the visit, simply tap it on the screen.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

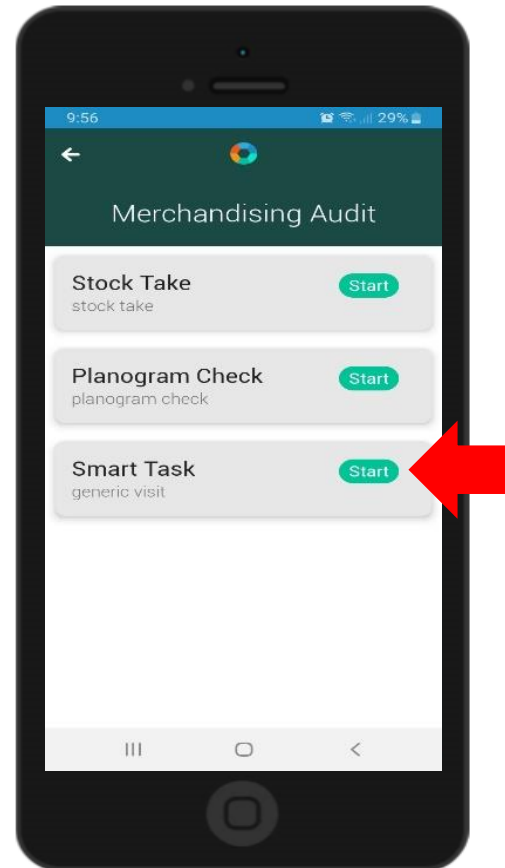
You will see all the tasks the visit contains. Tap the Start Task button. This retrieves the GPS coordinates of your current position. You won't be able to work on any tasks without tapping first this button.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

Thereafter, tap the Start button to work on any task.

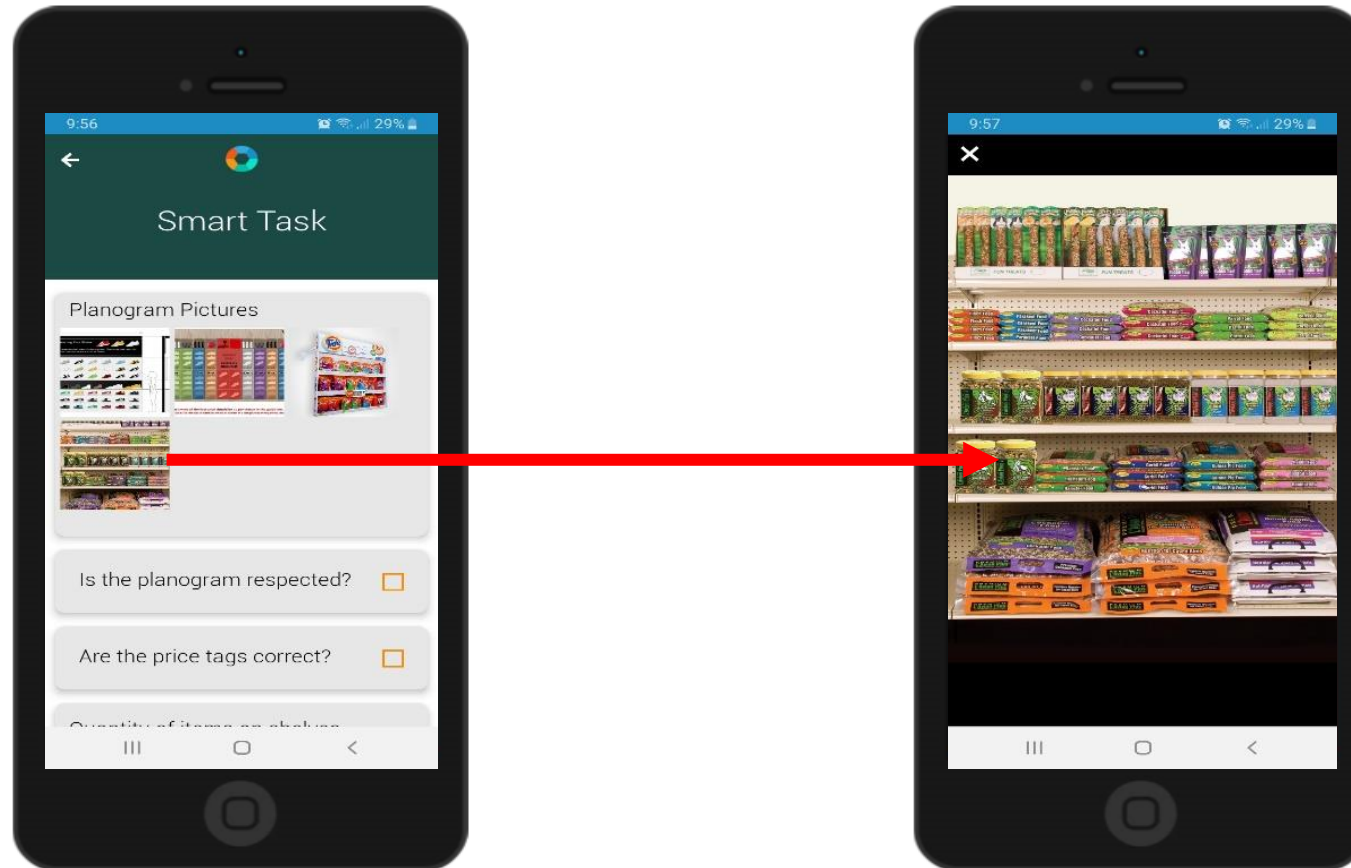






## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

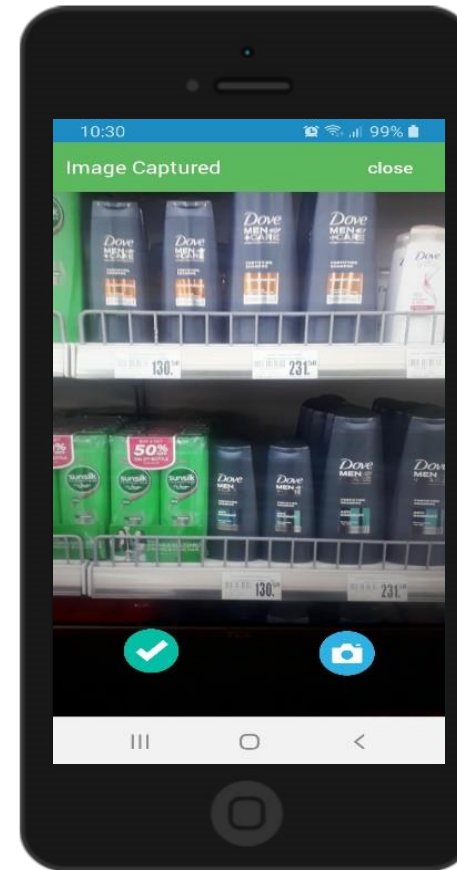
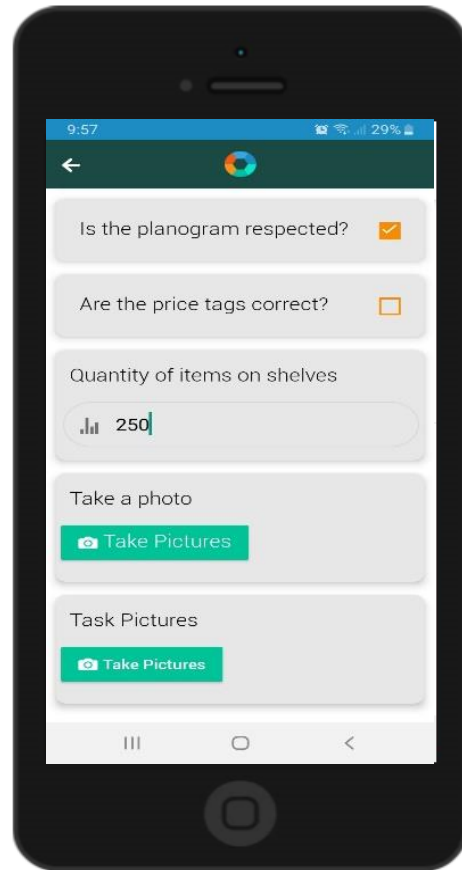
In a smart task, the planogram pictures assigned to a location are displayed at the beginning of the task items. Tap the image to enlarge. To assign pictures to a location, on the platform go to Settings > Location Settings > Planogram Pictures > Add Planogram > Assign Planogram to Locations.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

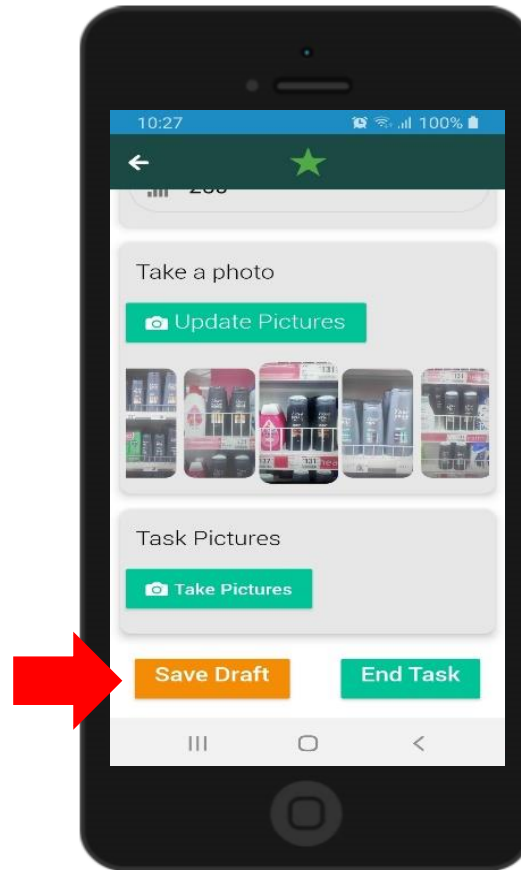
Perform the task items such as tick the box if yes or leave it blank if no, key in texts and numbers, choose from selections (multiple choice) and take photos. When taking photos, please wait until the validation message “Image Captured” appears before turning off the camera or taking another picture.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

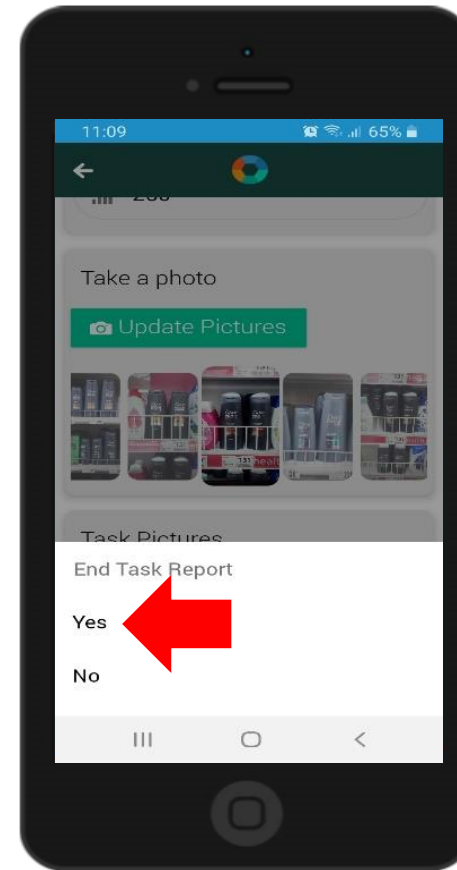
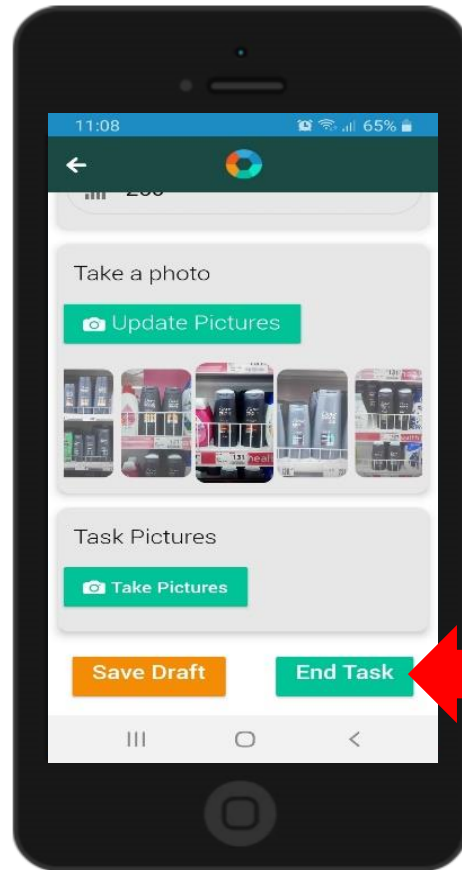
If you need to pause, tap the Save Draft button to save your work. However, do not log out of the app because all data will be erased. To return to the tasks, simply tap it to continue.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

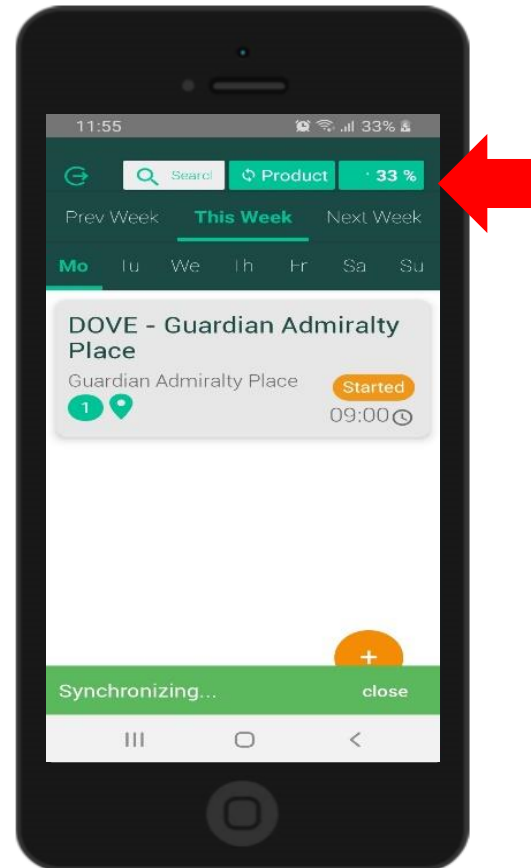
**5. End Task.** When you finished all the task items, tap the End Task button to conclude the task. Please note that once you end a task, you won't be able to go back and make changes to your work.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

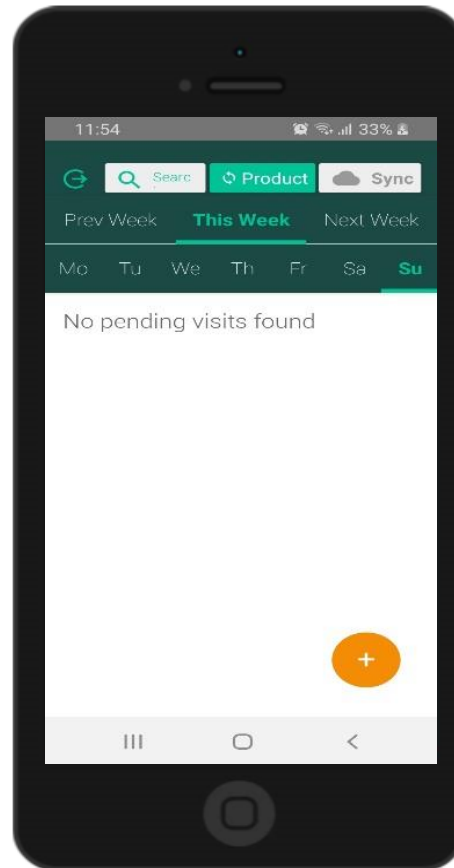
**6. Sync the data to the backend.** When you end a task, you'll see that the Sync button turns green in color which indicates that there are data waiting to be synced. Tap it to start the sync process (needs internet connection to perform this). Once the sync finishes, the button will revert to color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





## Optim Merchandising – Mobile Application Tutorial (Retail Execution)

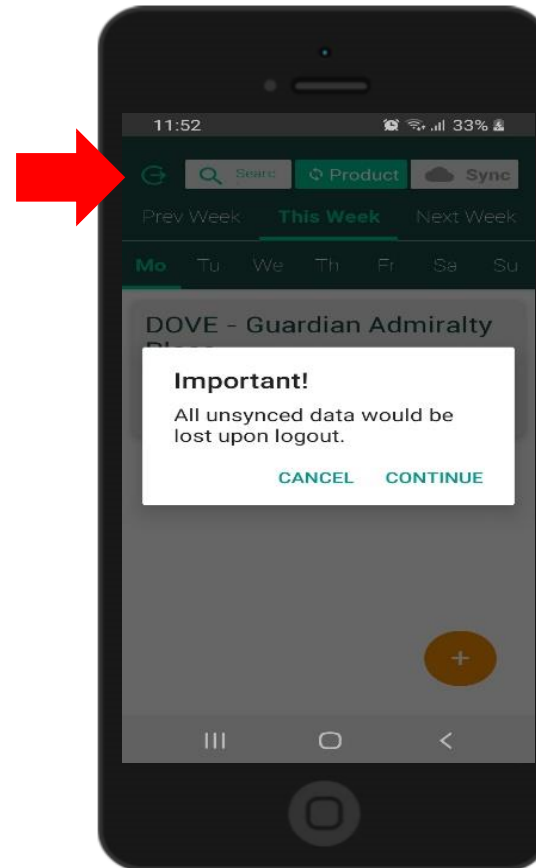
When all the tasks in a visit have been completed and synced, the visit disappears from the screen.





## Optim Merchandising – Mobile Application Tutorial (Retail Execution)

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 backend before you log out.





# Optim Merchandising – Mobile Application Tutorial (Retail Execution)

## 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 the client.	Assign Merchandiser to Client. On the platform, go to Settings > Location Settings > Client > edit > Add Merchandiser).





# OptimMerchandising – Mobile Application Tutorial (Retail Execution)

## 7. Troubleshooting

	Error	Cause	Solution
5	Start buttons are unresponsive.	Start Task button is not yet activated.	Tap 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.