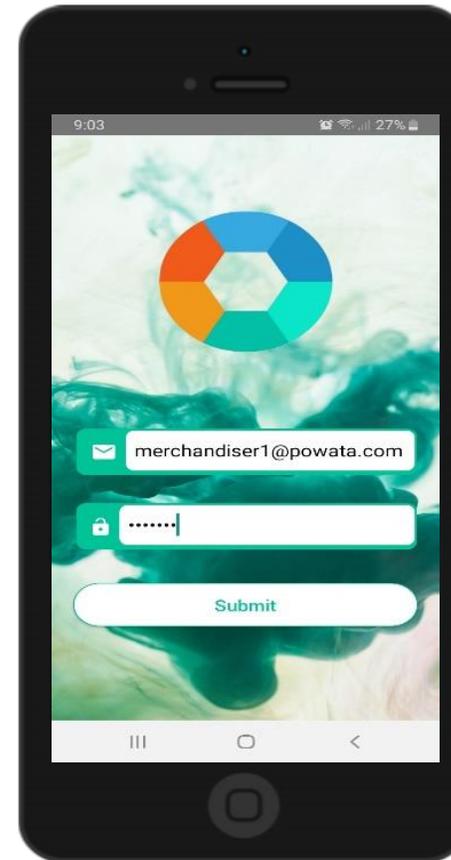
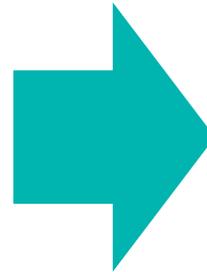
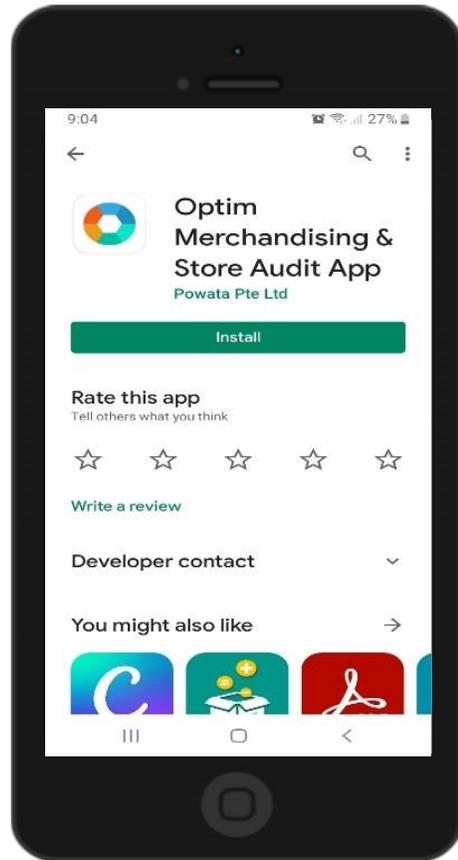




Optim Merchandising – Mobile Application Tutorial (Stock Management)

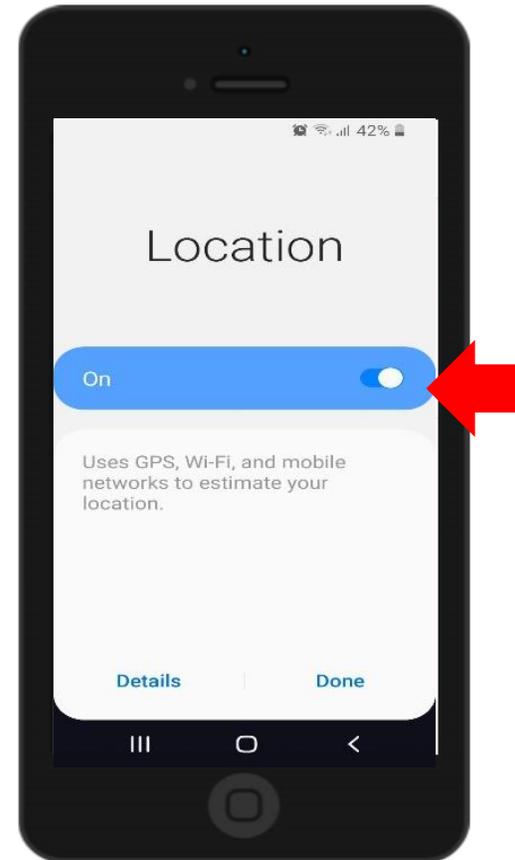
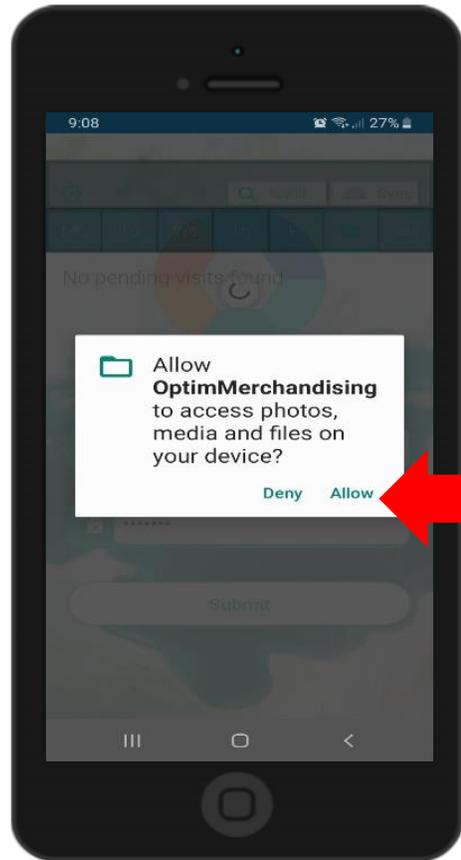
1. Download Optim Merchandising & Store Audit App from Google Play or App Store onto your device. Log in with the Merchandiser credentials.





OptimMerchandising – Mobile Application Tutorial (Stock Management)

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

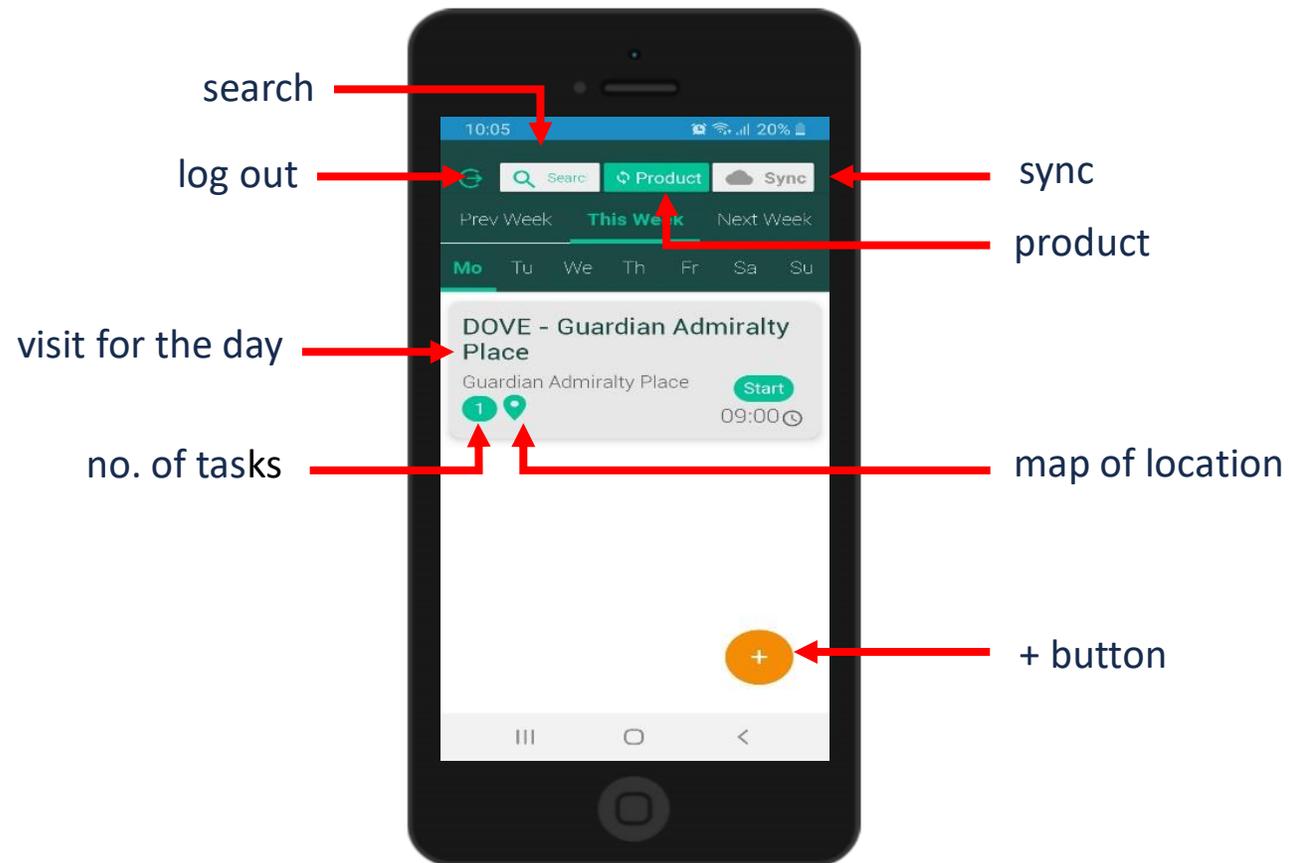




OptimMerchandising – Mobile Application Tutorial (Stock Management)

You'll be redirected to your schedule for the day. On the weekly 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.

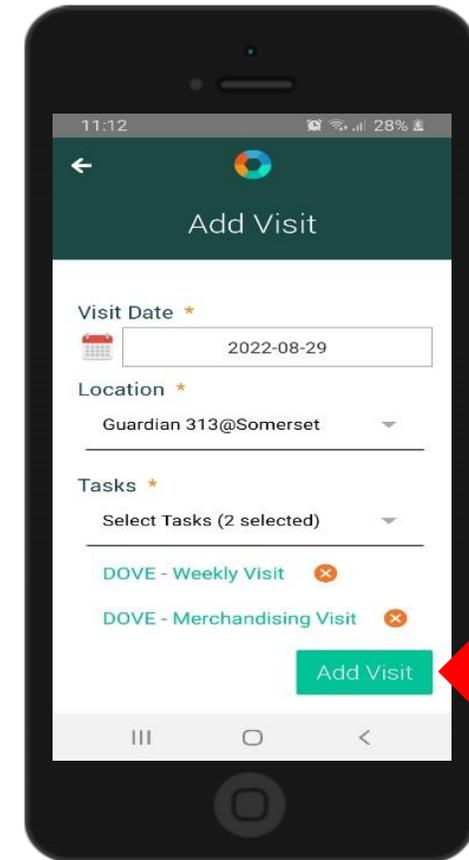
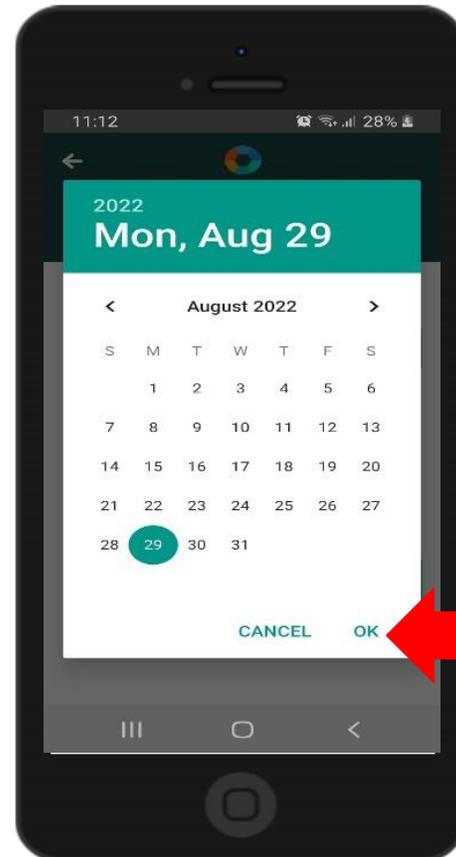
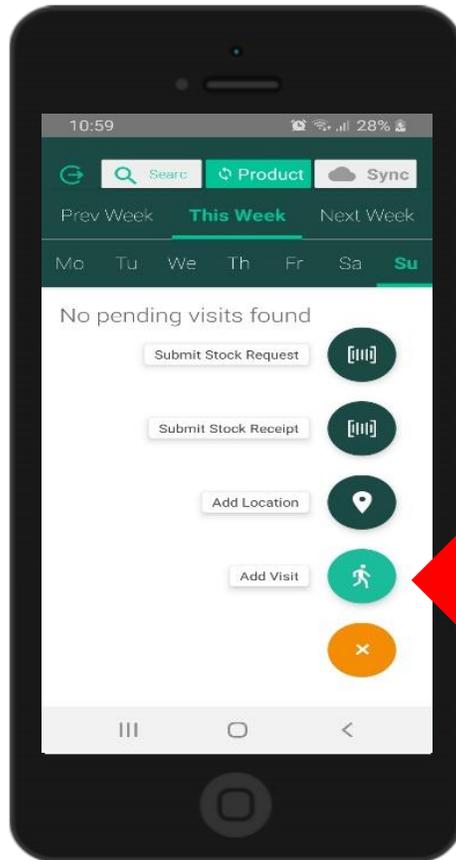




OptimMerchandising – Mobile Application Tutorial (Stock Management)

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.

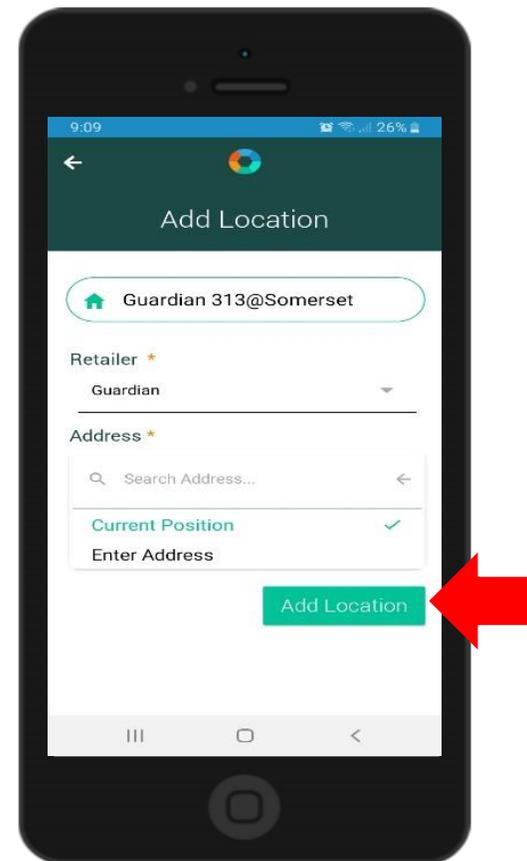
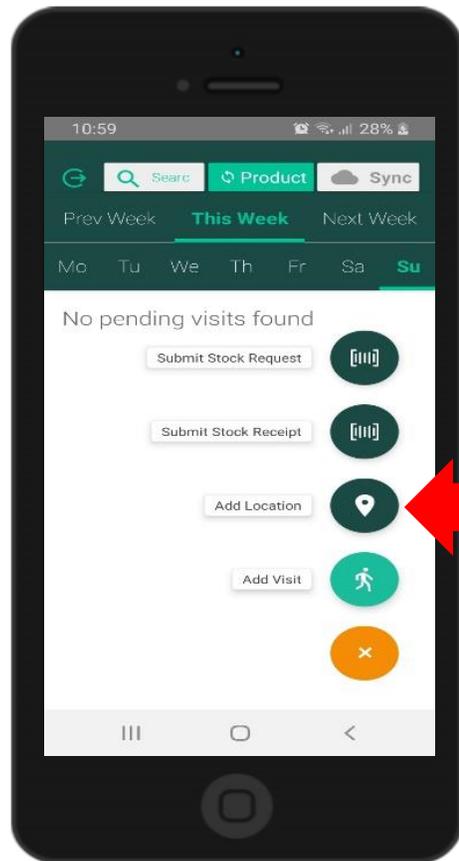
As mentioned earlier, the dashboard displays the visits for the previous, current, and the week ahead. If the visit you created is outside of these weeks, it won't be displayed on the screen until the week it is in has arrived.





OptimMerchandising – Mobile Application Tutorial (Stock Management)

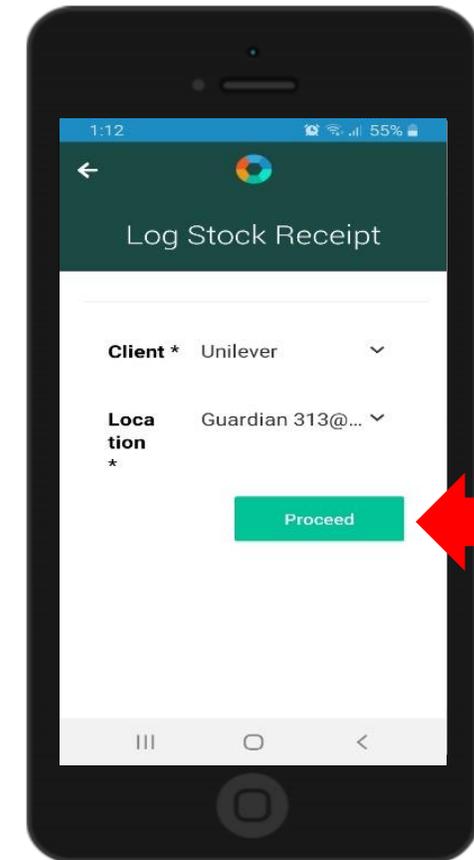
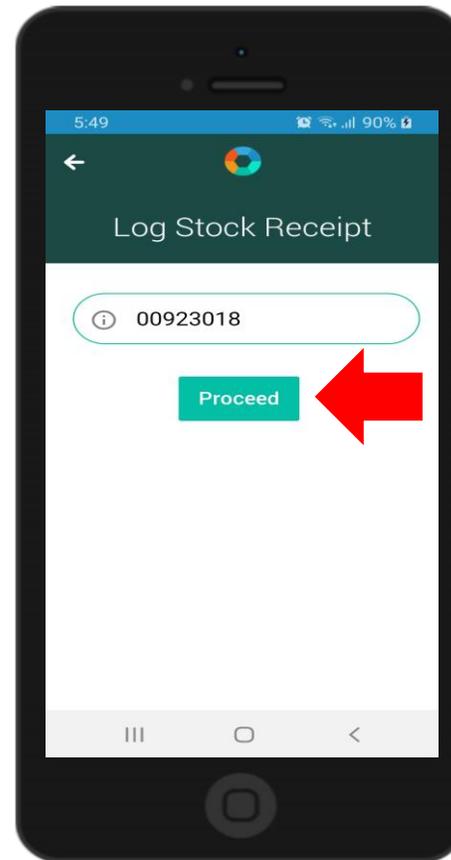
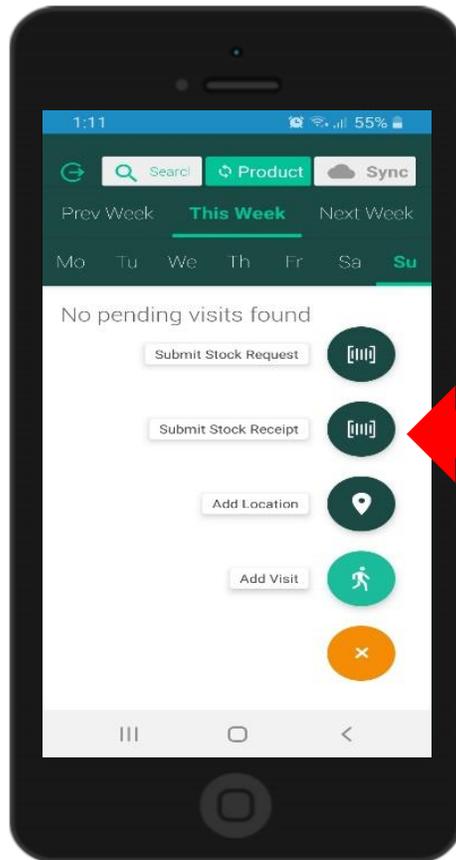
3. Create a location (only available when online). Create a new location by tapping the + button and select Add Location. Type the location name and select the retailer. For the address, you may choose “Current Position” which will automatically get the address based on the GPS coordinates of your current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





OptimMerchandising – Mobile Application Tutorial (Stock Management)

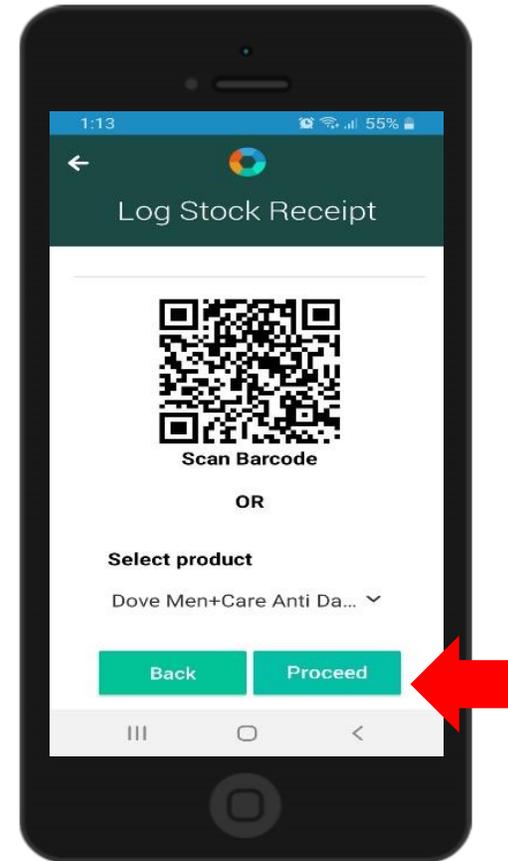
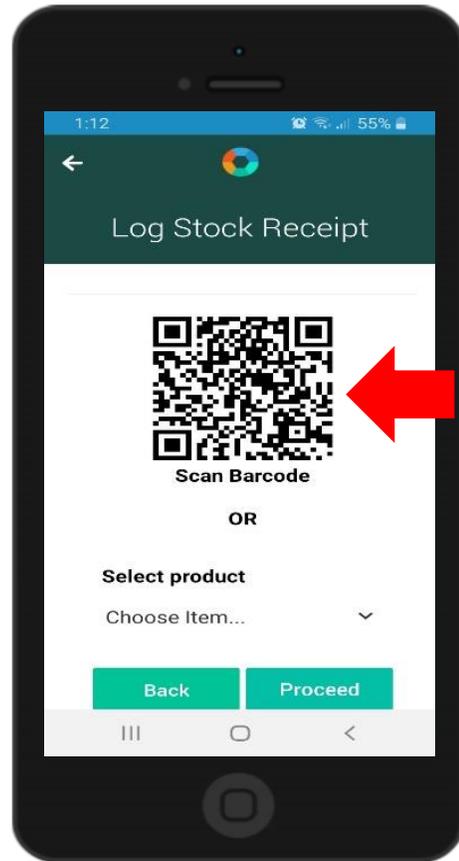
4. Submit a stock receipt (only available when online). Tap the + button and select Submit Stock Receipt. Key in the document number or reference code and tap Proceed. Choose a client and the location from the drop-down list. Then, tap Proceed.





OptimMerchandising – Mobile Application Tutorial (Stock Management)

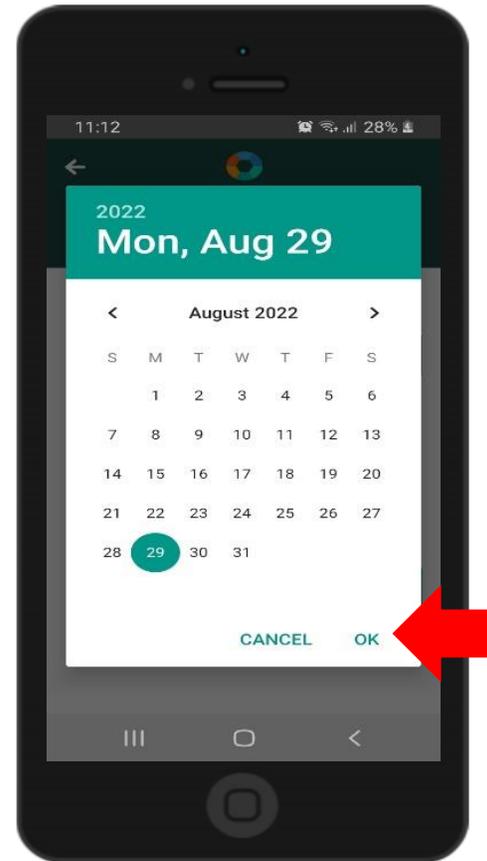
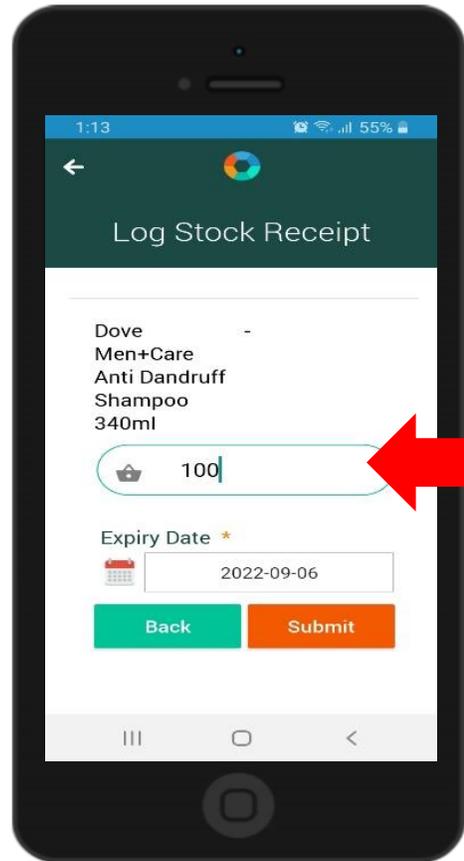
Select a product by scan or by selecting from the drop-down list. When you've selected a product from the drop-down list, tap Proceed.





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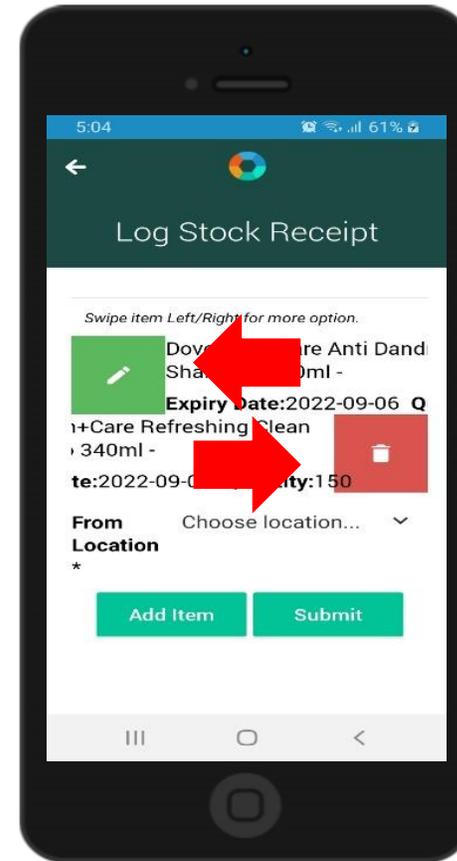
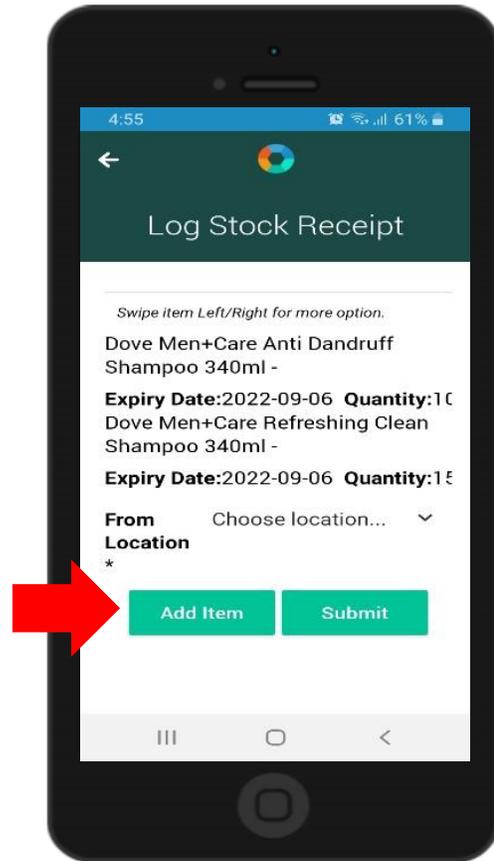
Key in the quantity received on the number field. Enter the expiry date by selecting a date from the calendar. Then, tap Submit.





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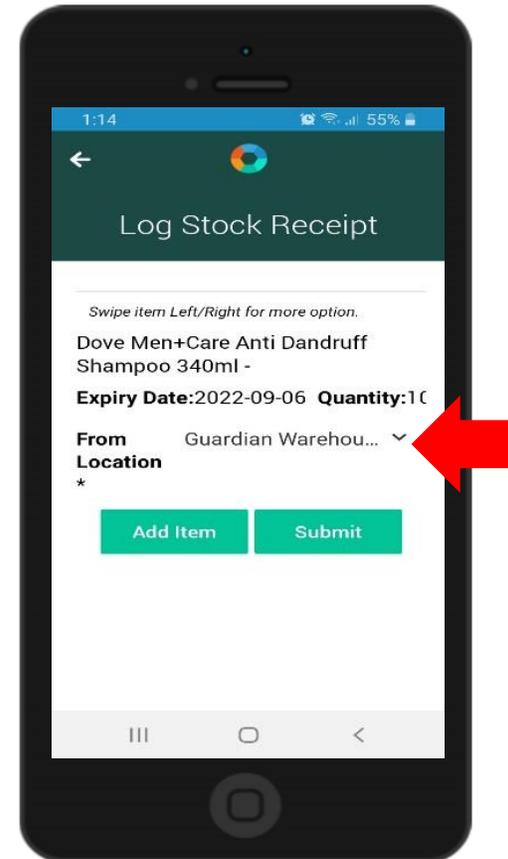
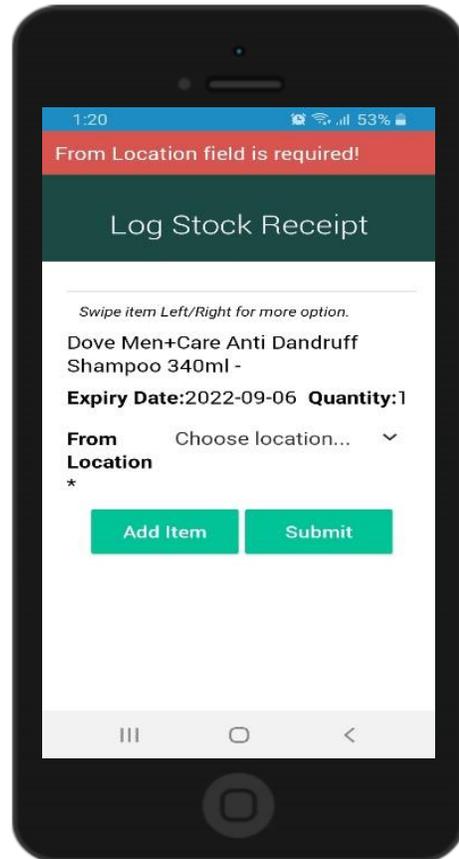
To add another product, tap Add Item. You may edit or delete an entry by tapping the item and swiping to the left or right.





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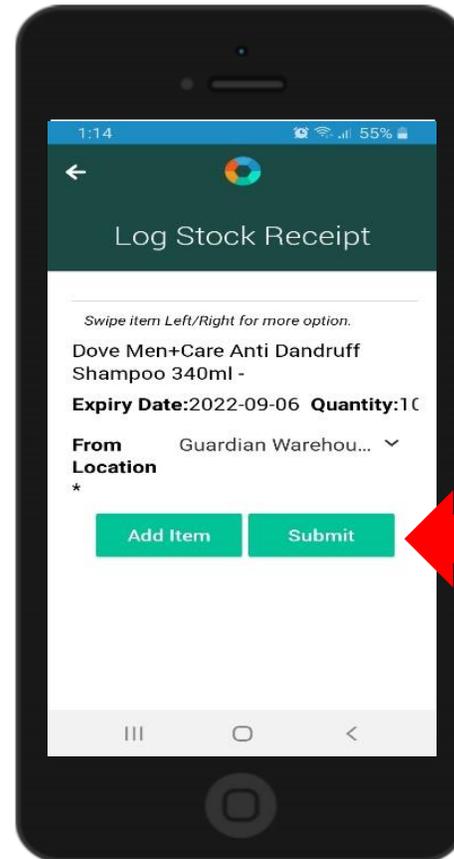
When you've finished scanning the products, select from the drop-down list the location the products came from. You won't be able to submit without selecting first the location.





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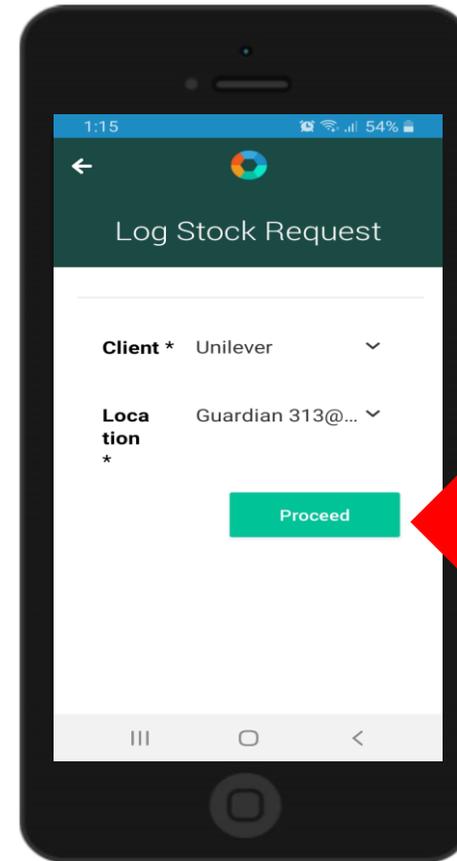
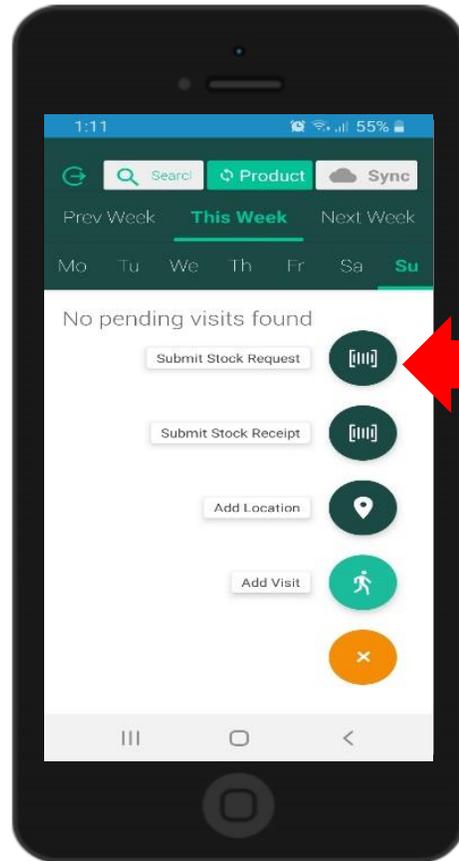
Then, tap Submit to send your request to the backend.





OptimMerchandising – Mobile Application Tutorial (Stock Management)

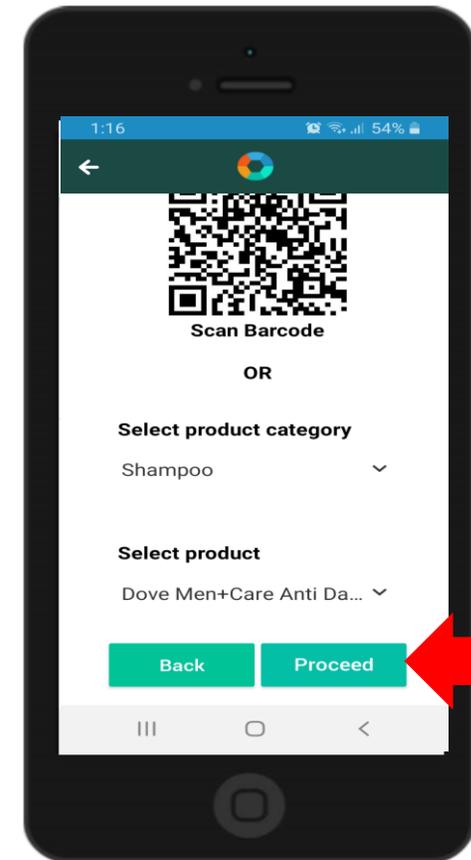
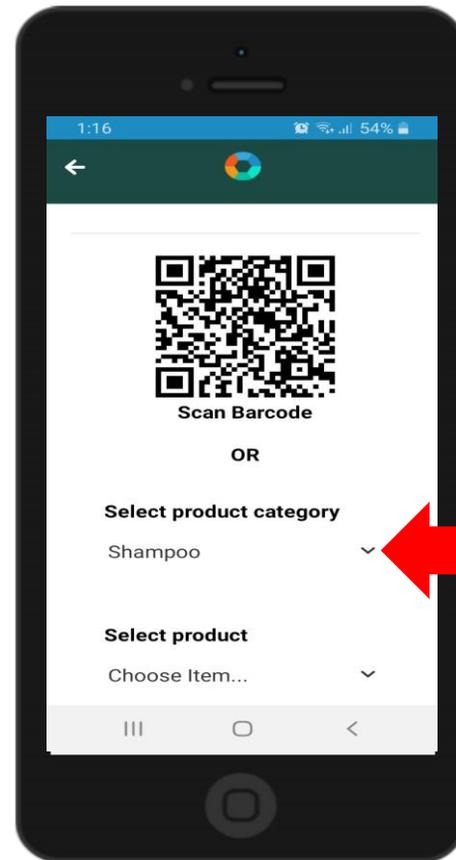
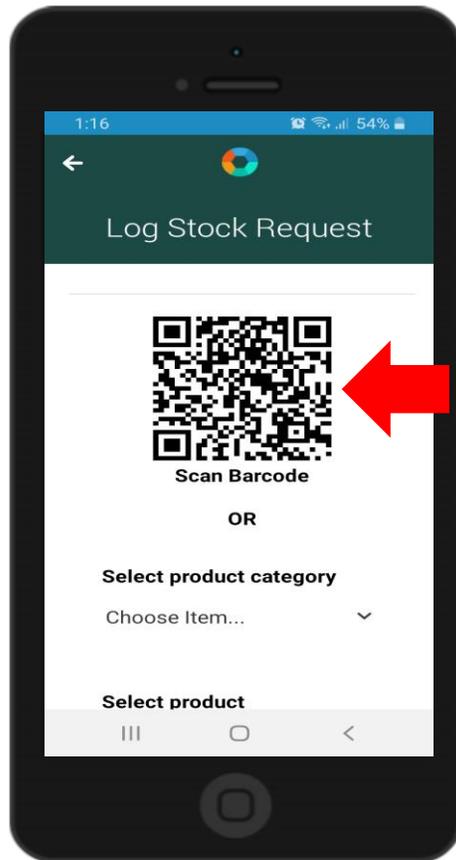
5. **Submit a stock request (only available when online).** Tap the + button and select Submit Stock Request. Choose a client and the location from the drop-down list. Then, tap Proceed.





OptimMerchandising – Mobile Application Tutorial (Stock Management)

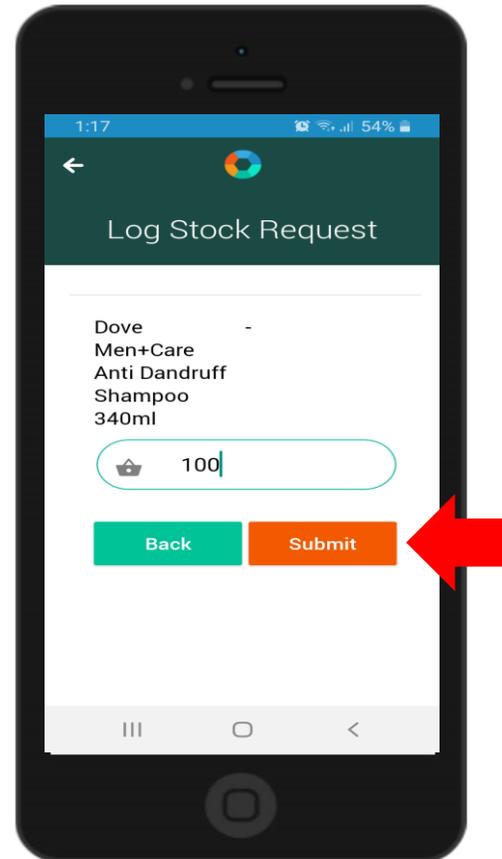
Select a product by scan or by selecting from the drop-down list. When selecting a product from the list, you must choose first a category. Then, select a product from the products drop-down list and tap Proceed.





OptimMerchandising – Mobile Application Tutorial (Stock Management)

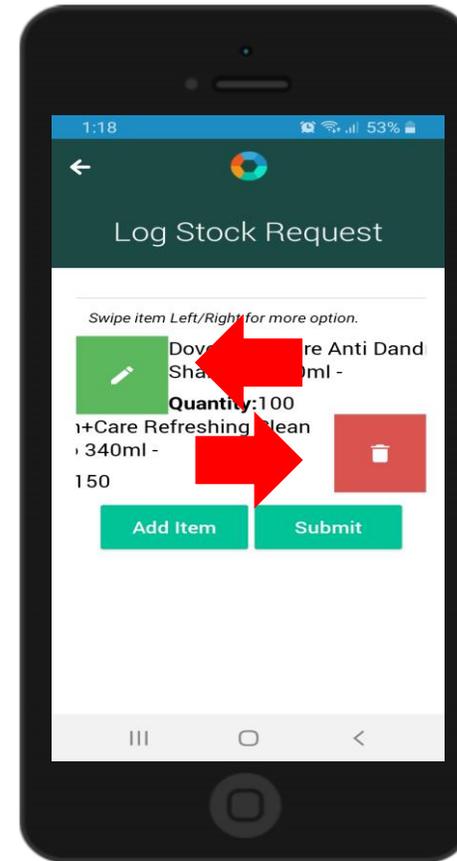
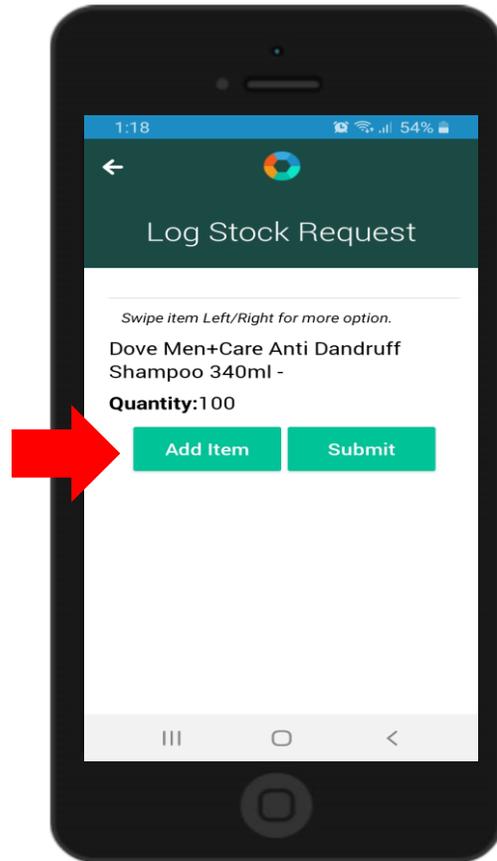
Key in the quantity requested on the number field. Then tap Submit to save the data and return to the stock request dashboard.





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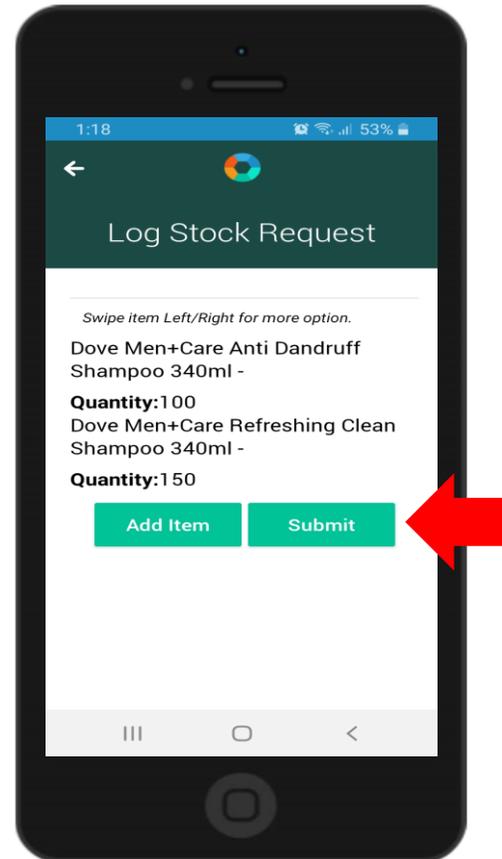
To add another product, tap Add Item. You may edit or delete an entry by tapping the item and swiping to the left or right.





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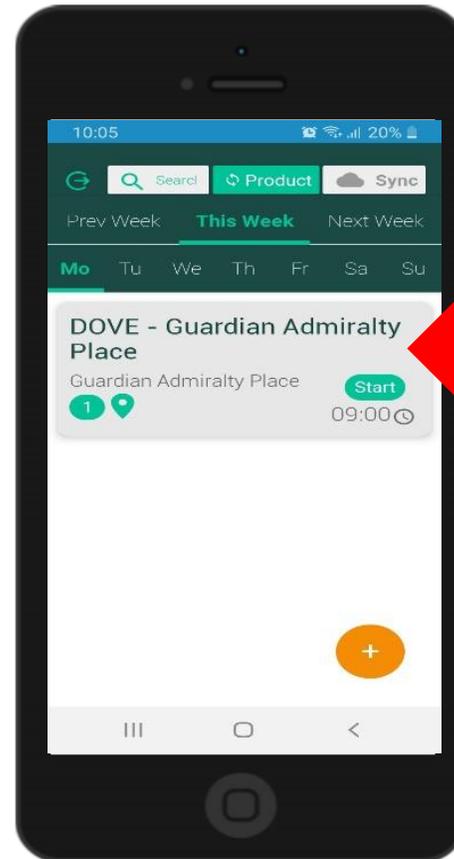
When you've added all the products to be requested, tap Submit to send your request to the backend.





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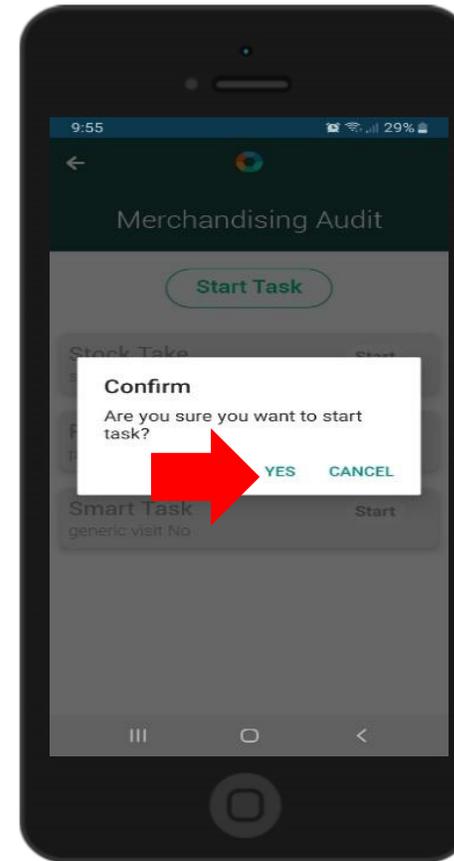
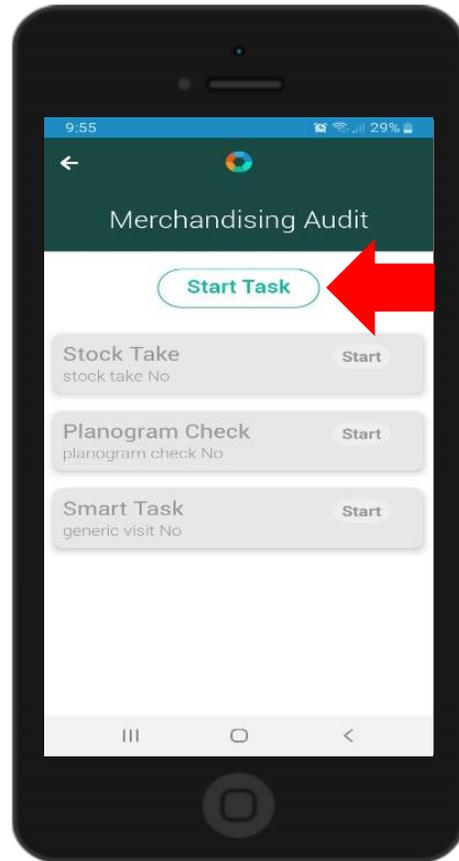
6. **Conduct the visit.** To open the visit, simply tap it on the screen.





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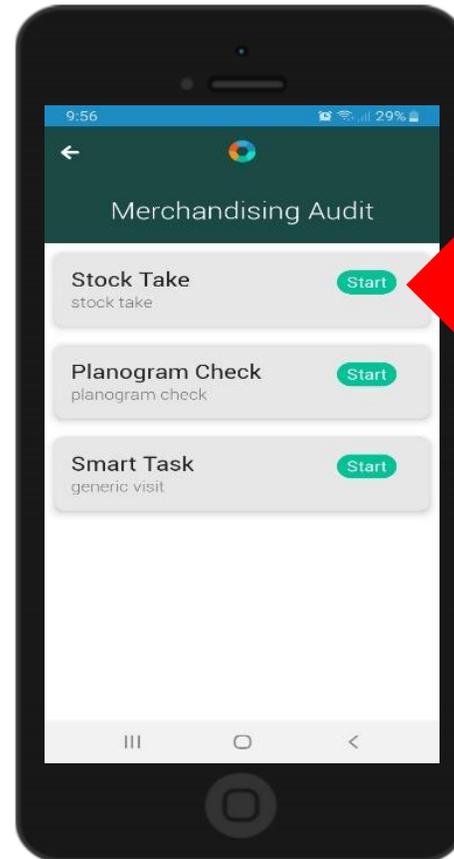
You will see all the tasks it contains. Tap the Start Task button. This retrieves the GPS coordinates of your current position. You won't be able to work on any tasks without tapping first this button.





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

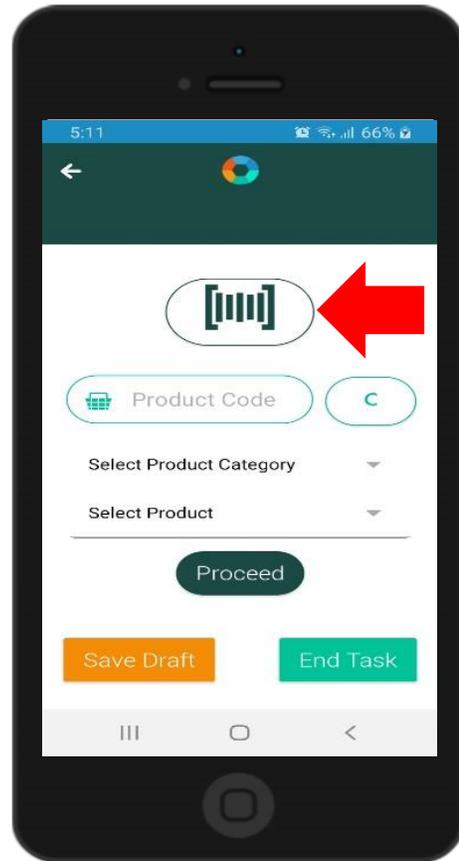




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In stock take and planogram task, you can select a product in 3 ways:

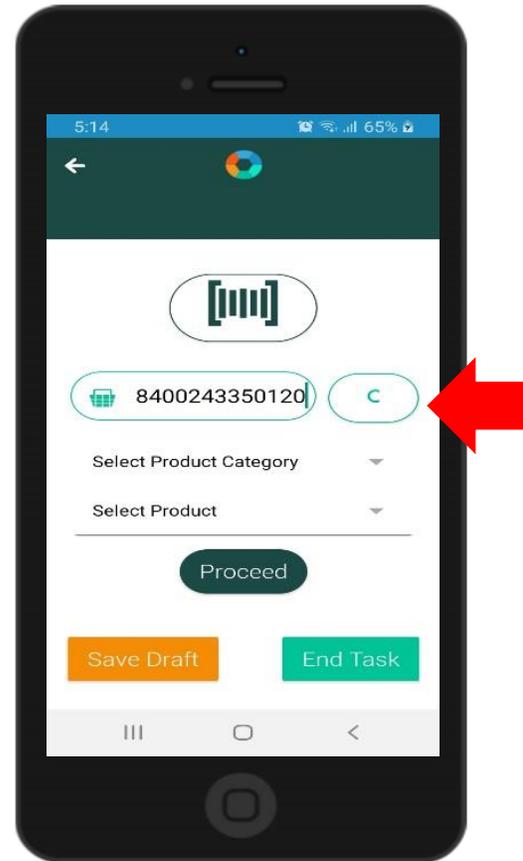
- a. by scanning the barcode





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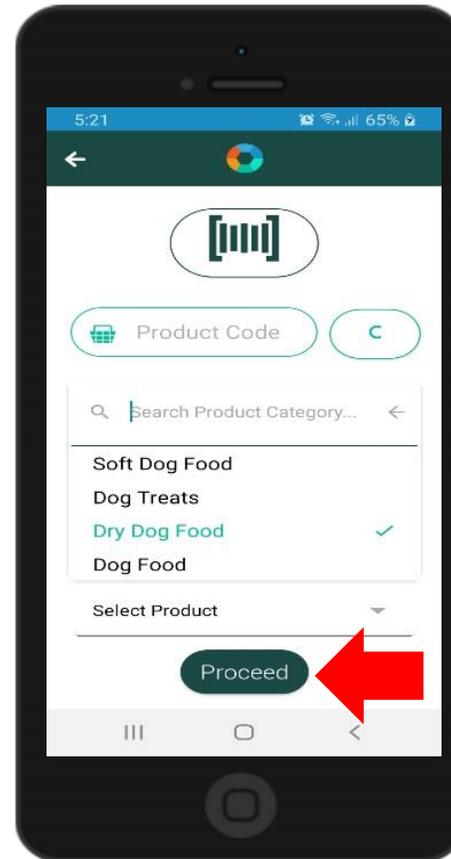
- b. by typing in the barcode on the product code field. Then tap Search.





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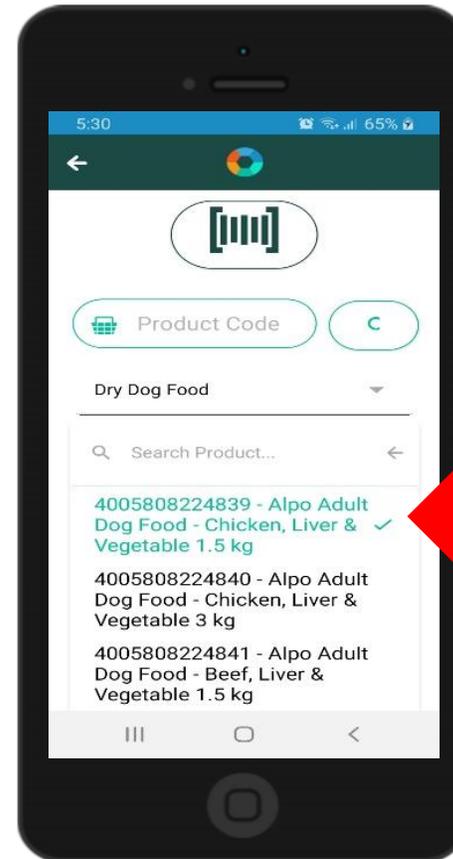
- c. by selecting from the drop-down list. You need to choose first a category and tap Proceed.





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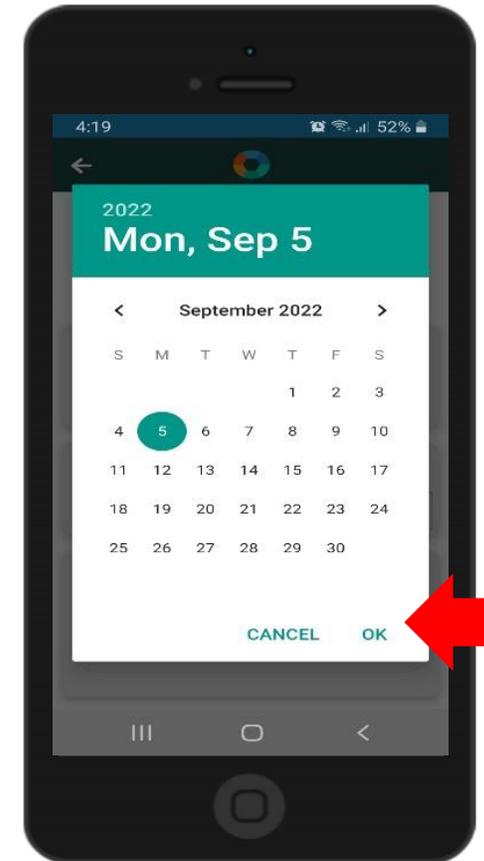
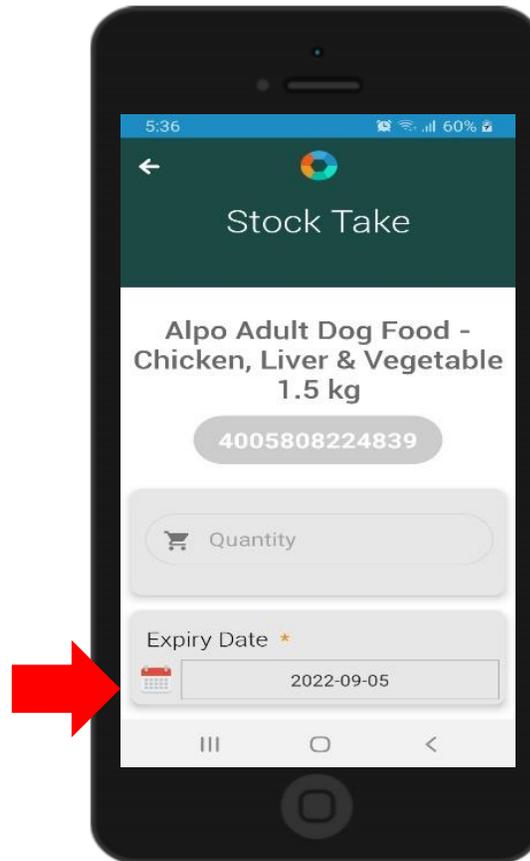
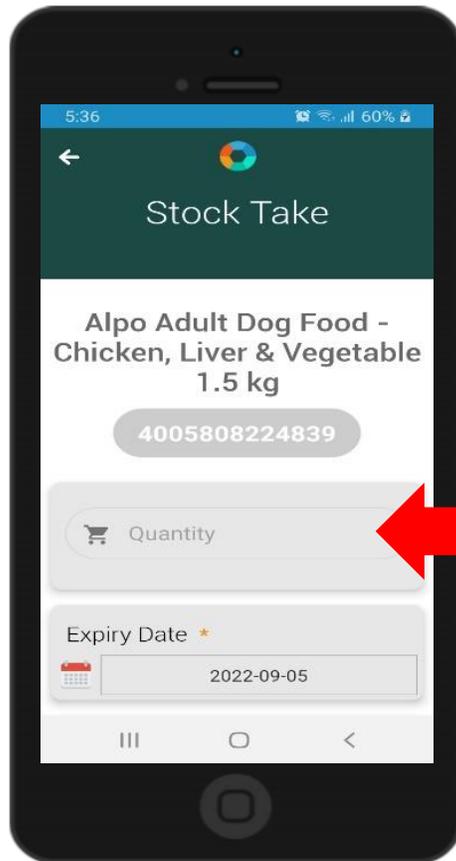
After you've selected a category, only products from that category will be displayed in the products drop-down list. Choose a product and tap Proceed.





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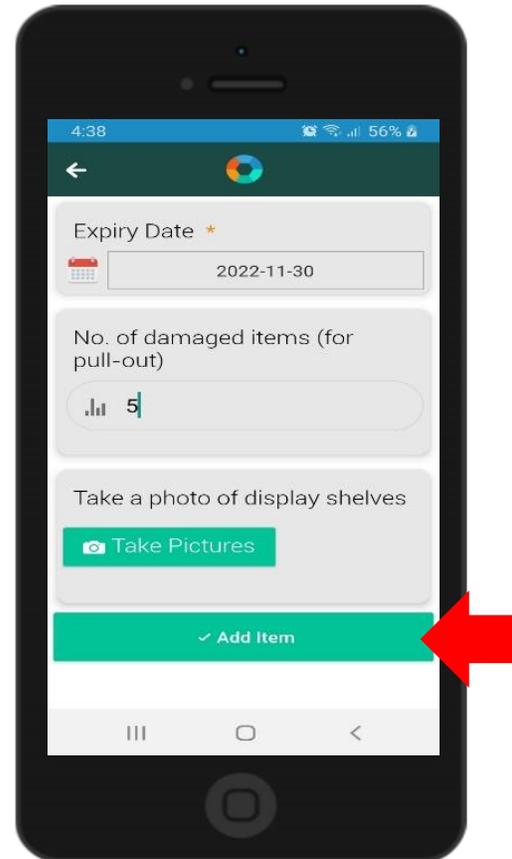
In a stock take task, there are 2 default task items – quantity and expiry date. To enter the expiry date, tap the calendar icon. Navigate the calendar by tapping the < > symbols to go backward or forward and arrive at the correct expiry date of the product. Tap the date and choose OK to enter the expiry date.





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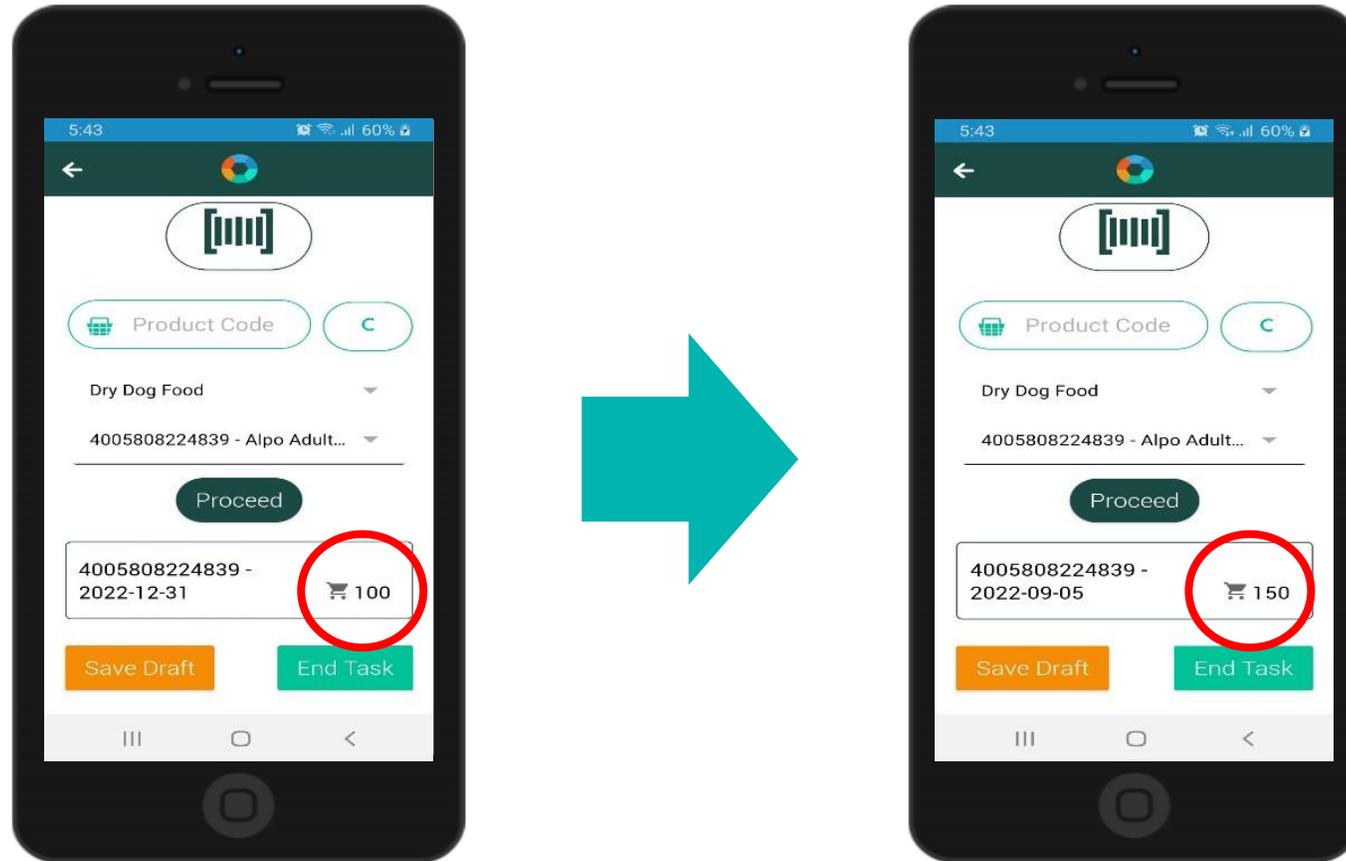
When you've filled in the task items, tap Add Item to save the data and return to the stock take dashboard.





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When you scan the same barcode multiple times, the quantities are aggregated and displayed as a single entry in the table and in the reports.





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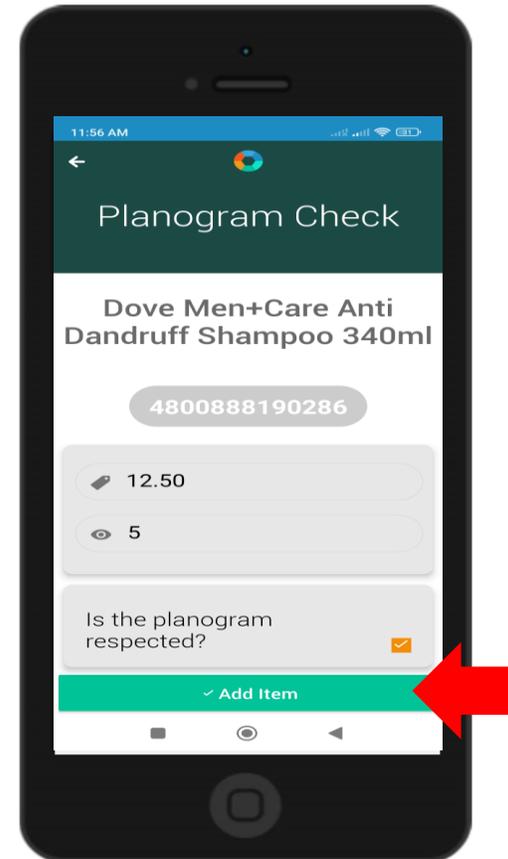
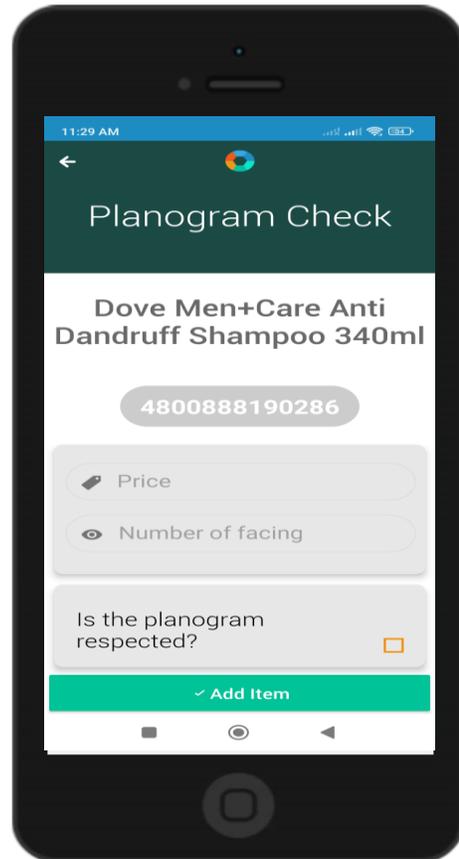
The scanned products with their count are displayed in the stock dashboard. If you need to delete an entry, tap it and swipe to the left until the trash bin button appears. Tap this button to delete the entry.





Optim Merchandising – Mobile Application Tutorial (Stock Management)

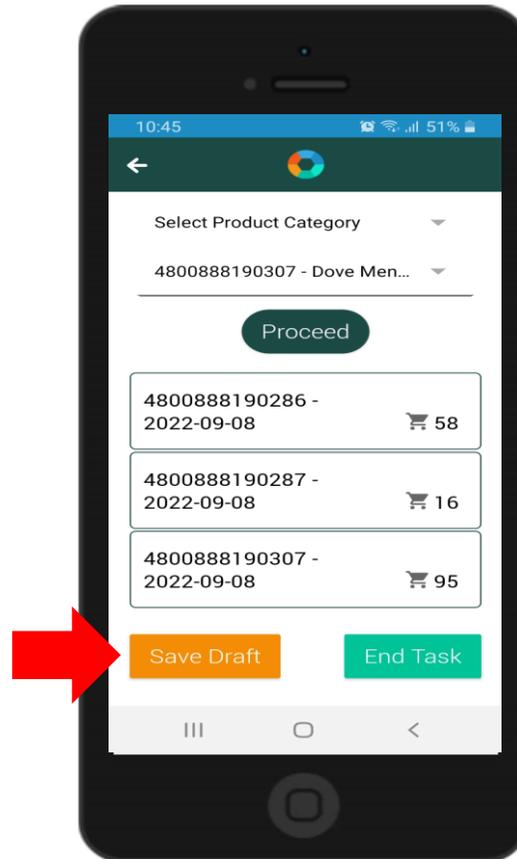
In a planogram check task, there are 2 default task items – price and no. of facing. Once you filled in all the task items, tap Add Item to save the data and return to the planogram check dashboard.





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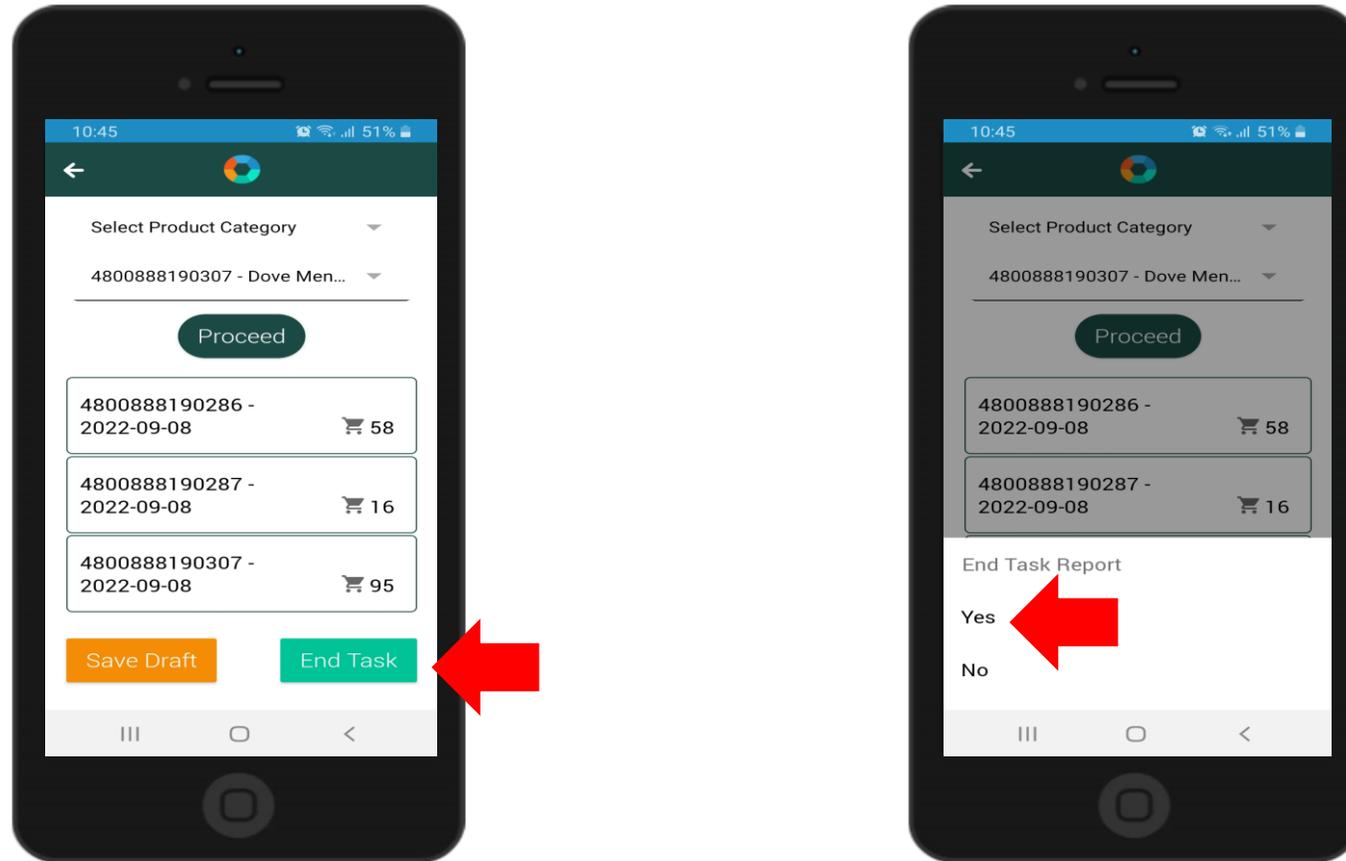
If you need to pause, tap the Save Draft button to save your work. However, do not log out of the app because all data will be erased. To return to the tasks, simply tap it to continue.





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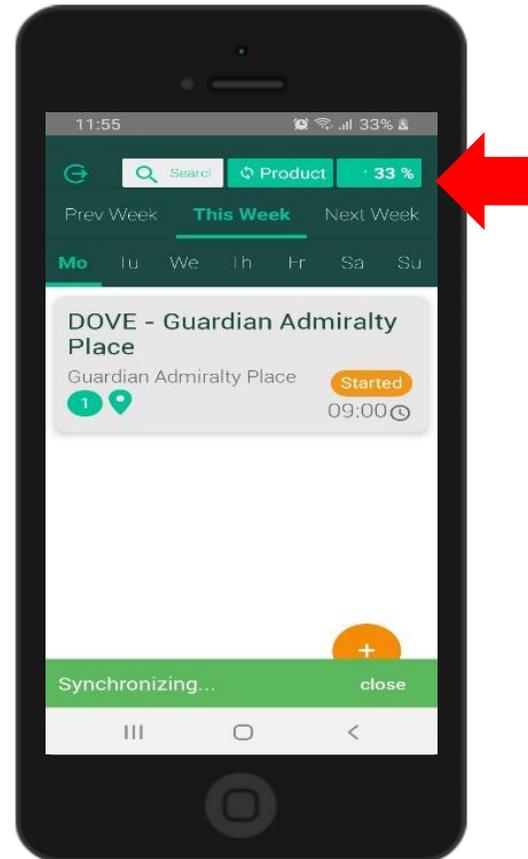
7. End Task. When you finished scanning the products, tap the End Task button to conclude the task. Please note that once you end a task, you won't be able to go back and make changes to your work.





OptimMerchandising – Mobile Application Tutorial (Stock Management)

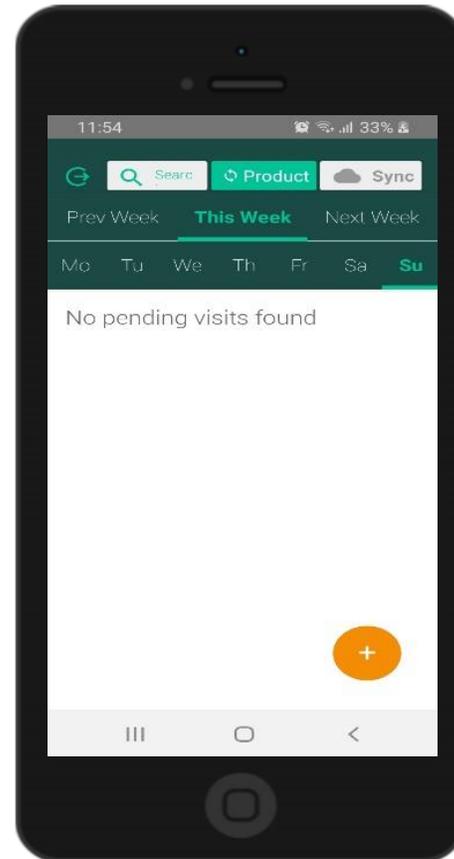
8. Sync the data to the backend. When you end a task, you'll see that the Sync button turns green in color which indicates that there are data waiting to be synced. Tap it to start the sync process (needs internet connection to perform this). Once the sync finishes, the button will revert to color gray.





Optim Merchandising – Mobile Application Tutorial (Stock Management)

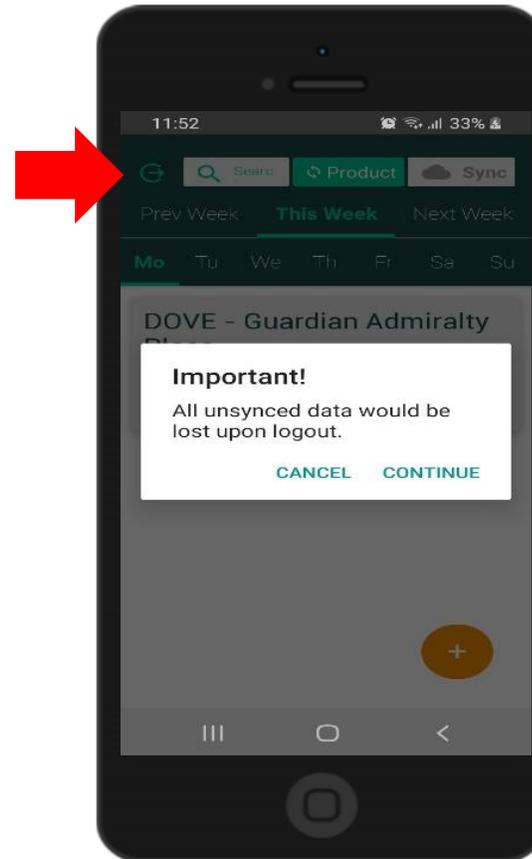
When all the tasks in a visit have been completed and synced, the visit disappears from the screen.





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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.





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9. 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 (Stock Management)

9. 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	Products list is empty in stock take or planogram check.		Try any of the following: <ul style="list-style-type: none">• Go to the dashboard and tap the Product button• Log out / Log in again on the app• Go to phone Settings > Apps > OptimMerchandising > Storage > Clear Cache• Check if app has the latest version
7	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.