



OptimMerchandising – How to Create Recurring Visits

[Recurring Visits](#)

1. Go to app.optimmerchandising.com and log in with the Manager or Supervisor credentials.
2. In Actions tab > Visits > Add Recurring Visits

The screenshot shows the 'powata' web application interface. The top navigation bar includes 'Retail Execution', 'Stock Management', and 'Sales'. The left sidebar contains a menu with 'Activities', 'Actions', 'Visits', 'Calendar', 'Reports', 'Locations', 'Merchandisers', and 'Tasks'. The main content area is titled 'Visits' and features several filters: 'Retailer', 'Merchandiser', and 'To Complete'. Below these are date filters for 'From' (2020-04-05) and 'To' (2020-05-05), with a 'Filter' button. At the bottom of the filter section, there are four orange buttons: 'Bulk Add Visit', 'Create Task', 'Add New Visit', and 'Add Recurring V...'. A red arrow with the number '2' points to the 'Add Recurring V...' button. At the bottom left, there is a 'Display' dropdown set to '10 records'.



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3. Select the period the visit will run.

Add Recurring Visit

From * **3** To * **3**

Merchandise *

| Visit Start Time | Visit End Time | Location | Task | |
|--------------------------------------|--------------------------------------|--|--|----------------------------------|
| <input type="text" value="09:00"/> × | <input type="text" value="18:00"/> × | <input type="text" value="My First Loca"/> ▾ | <input type="text" value="Select option"/> ▾ | <input type="button" value="🗑"/> |

task is required



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4. Choose the department and assign a Merchandiser to the visit.

Add Recurring Visit

From * To *

Department* Merchandiser*

| Day | Frequency | Visit Start Time | Visit End Time | Location | Task | |
|----------------------------------|--|--------------------------------------|--------------------------------------|--|---|--|
| <input type="text" value="Day"/> | <input type="text" value="Frequency"/> | <input type="text" value="09:00"/> × | <input type="text" value="18:00"/> × | <input type="text" value="My First Loca"/> | <input type="text" value="Select option"/> <i>task is required</i> | |



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5. For each row, you must set the following:

- Day (Monday, Tuesday, Wednesday....)
- Frequency (weekly, every 2 weeks, every 3 weeks, or every 4 weeks)
- Start Time and End Time
- Location
- Tasks (select as many tasks as needed)

6. Click on Submit.

| | | | | | | | | | |
|---------------------------|--------------------------|------------------|-------|----------------|-------|----------|-------------|------|---|
| Department* | Beauty and Personal Care | Merchandiser* | First | | | | | | |
| Day | Monday | Visit Start Time | 09:00 | Visit End Time | 18:00 | Location | Guardian 31 | Task | Smart Task x Stock Take x Planogram Check x |
| + Add Row | | | | | | | | | |
| Submit | | | | | | | | | |