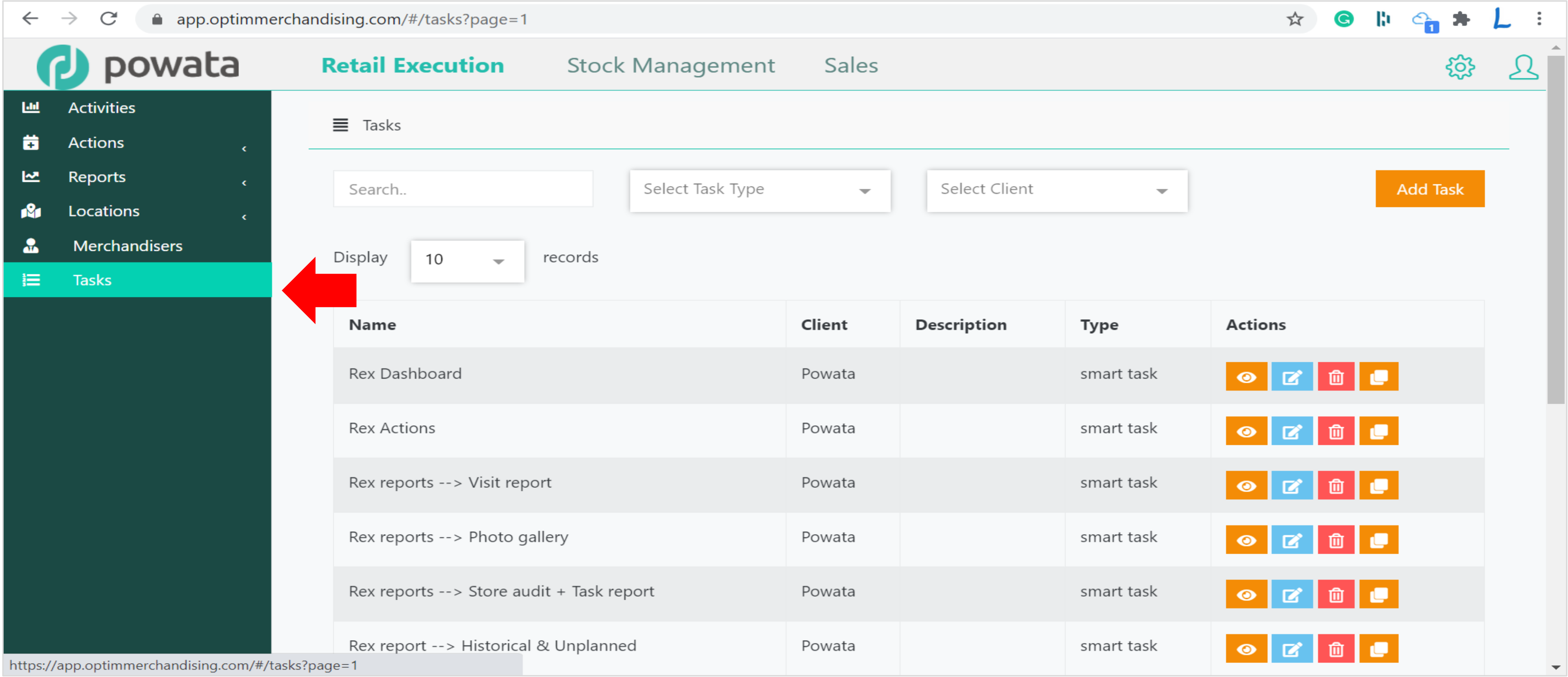
OptimMerchandising – How to Create Tasks

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.



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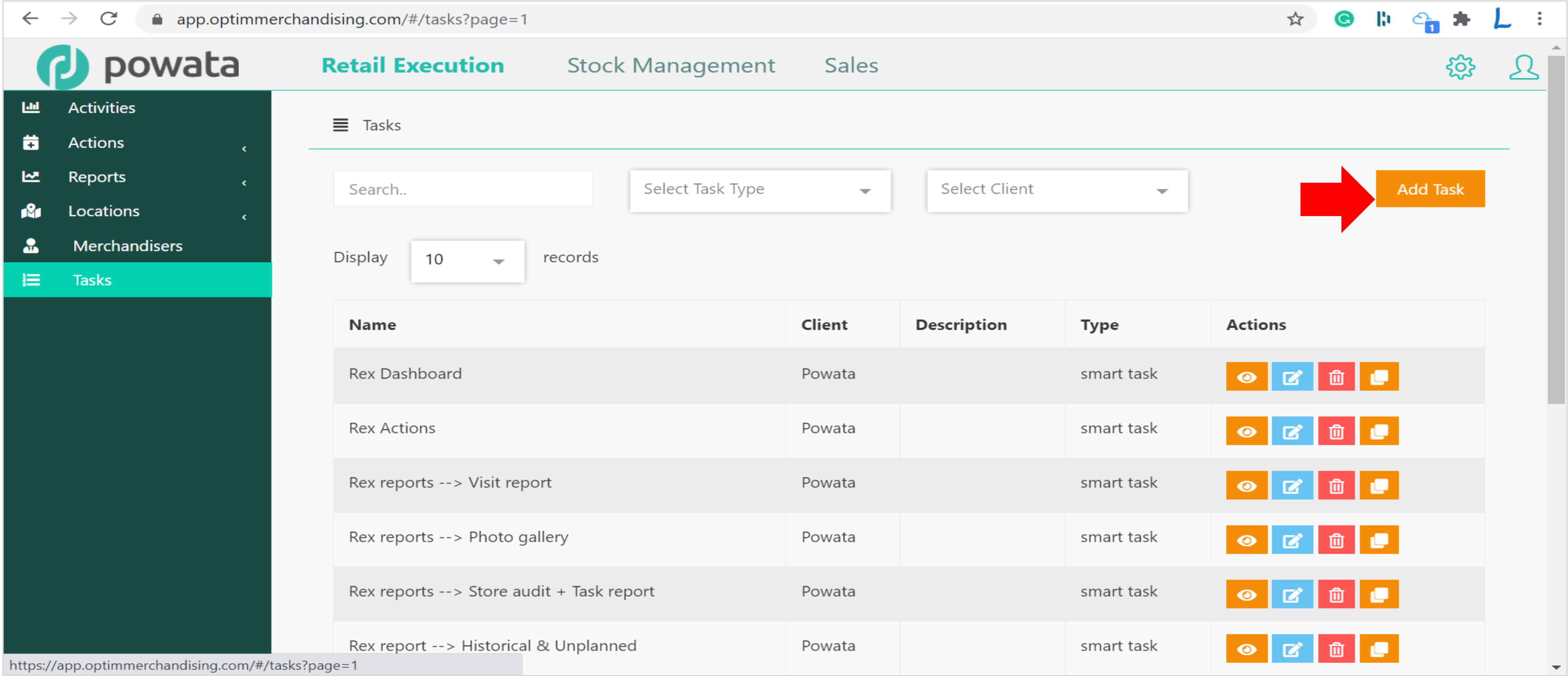
3. To create a new task, click on the Add Task button.



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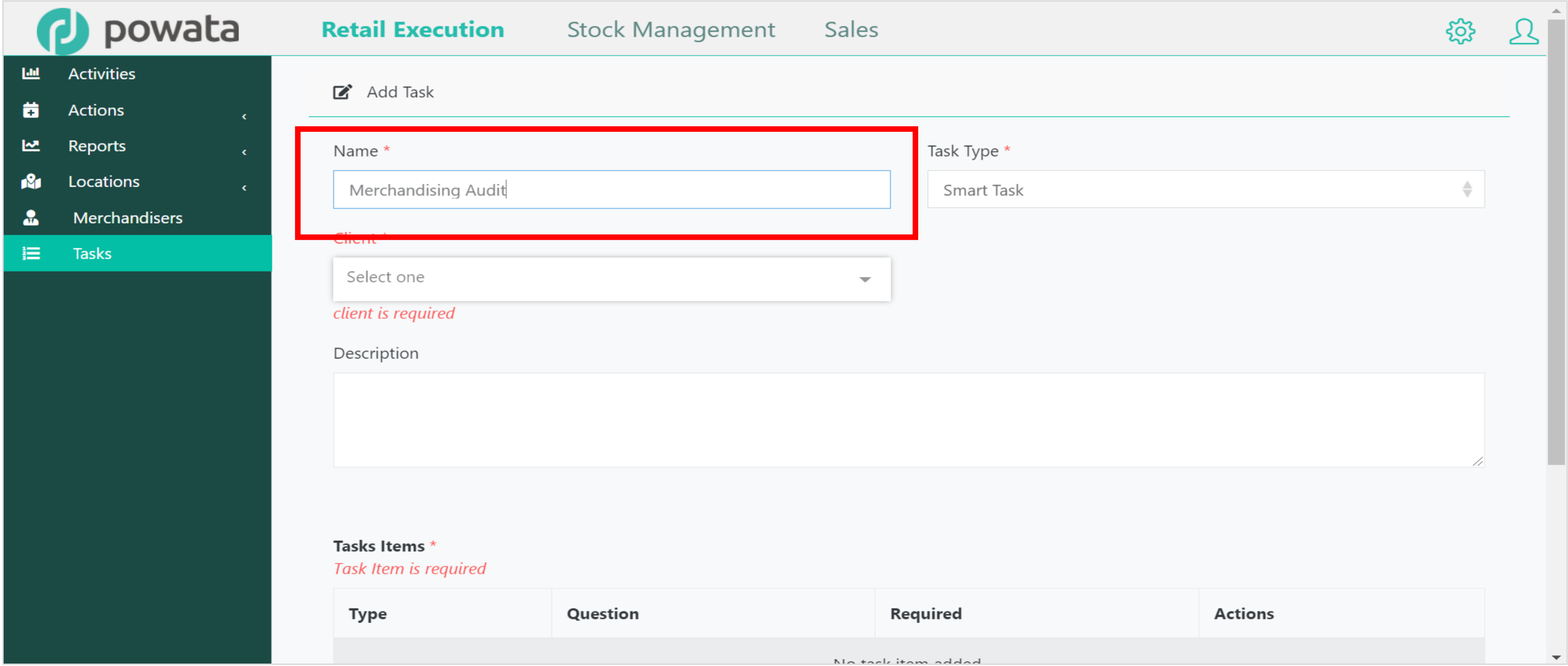
4. In the add task form, type the name of the task.



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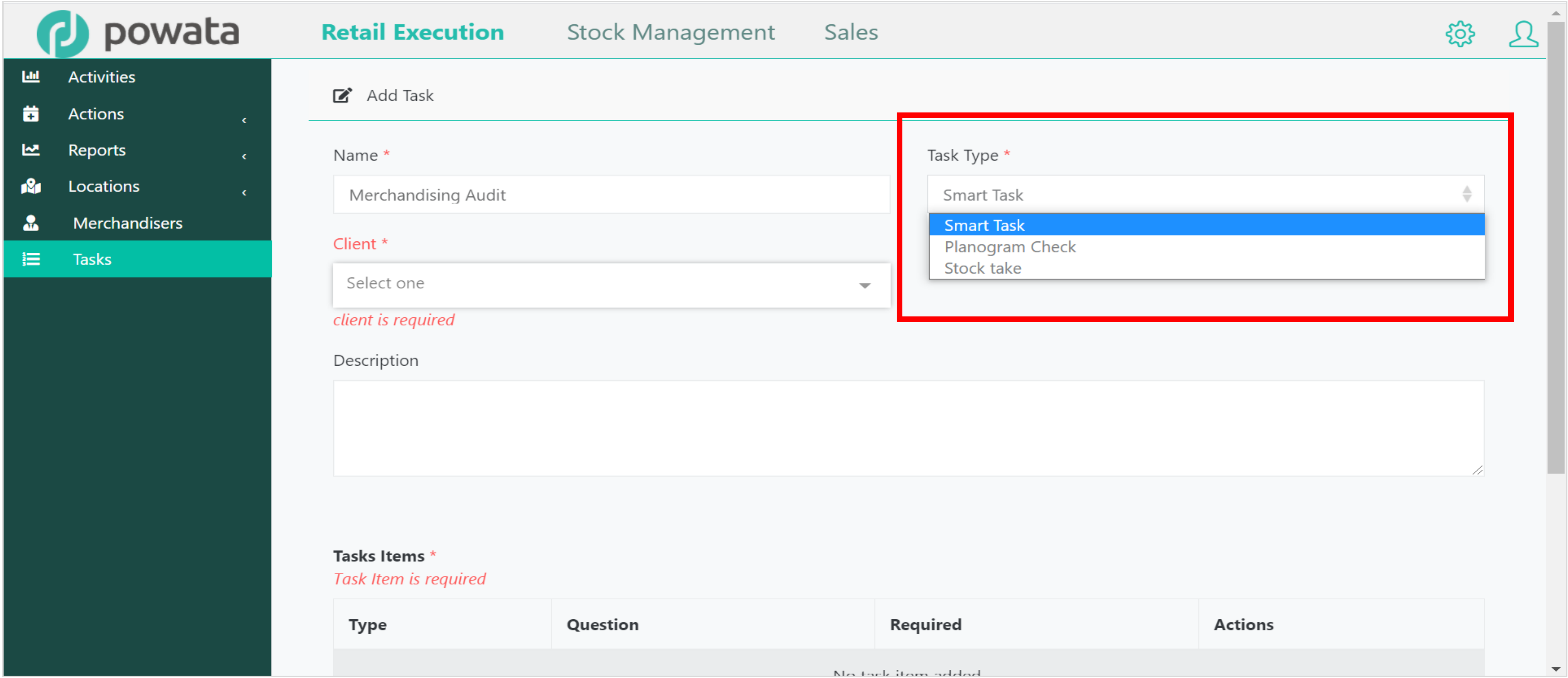
5. Select the task type – smart tasks (for creating generic questionnaire), planogram check, or stock take.



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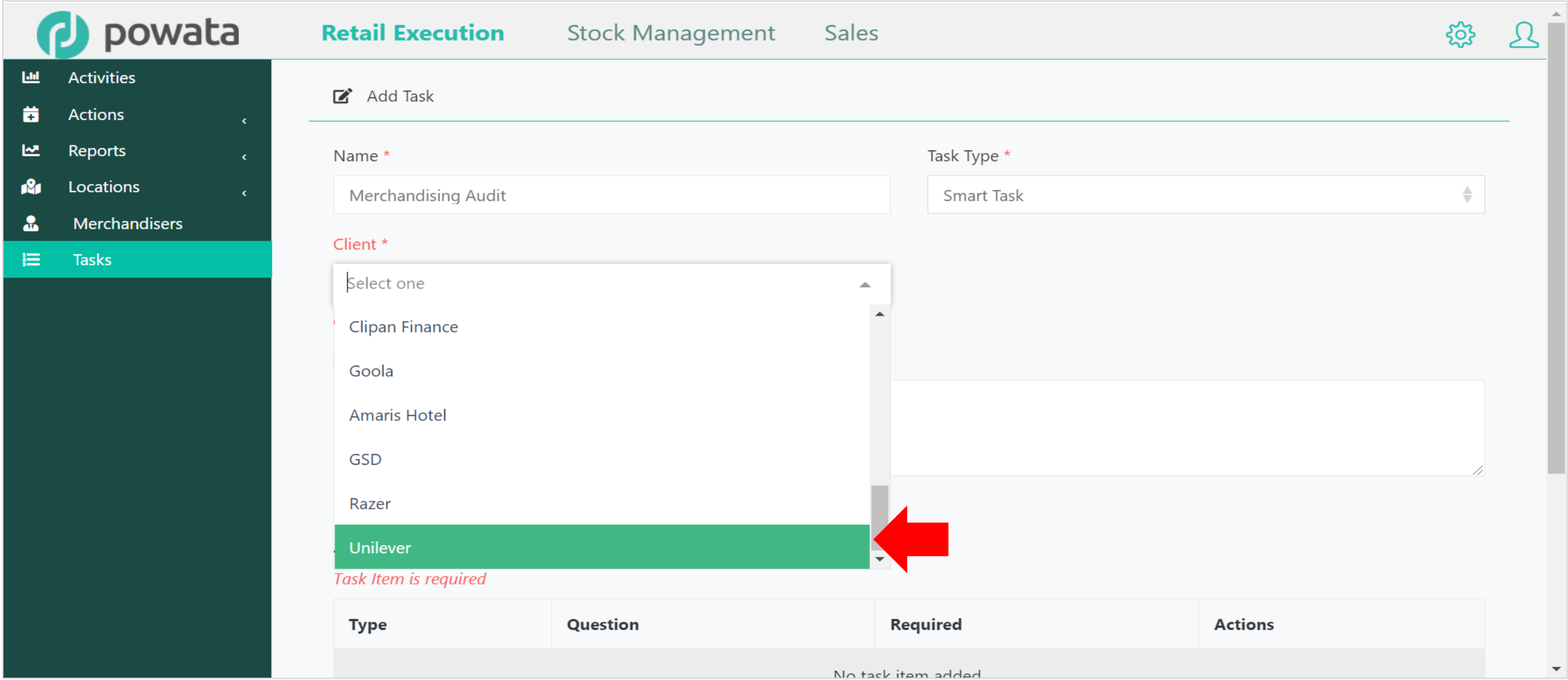
6. Select the client.



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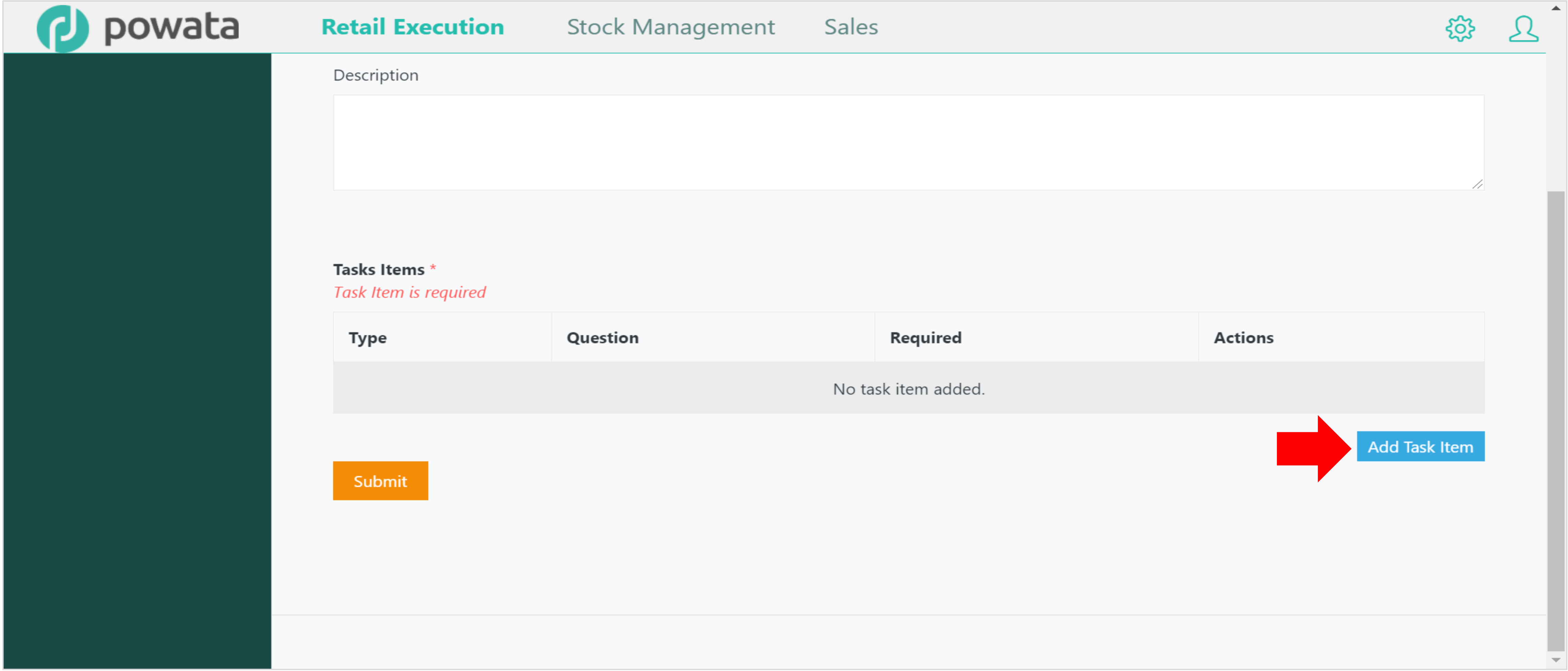
7. To add the task items, click on the Add Task Item button.



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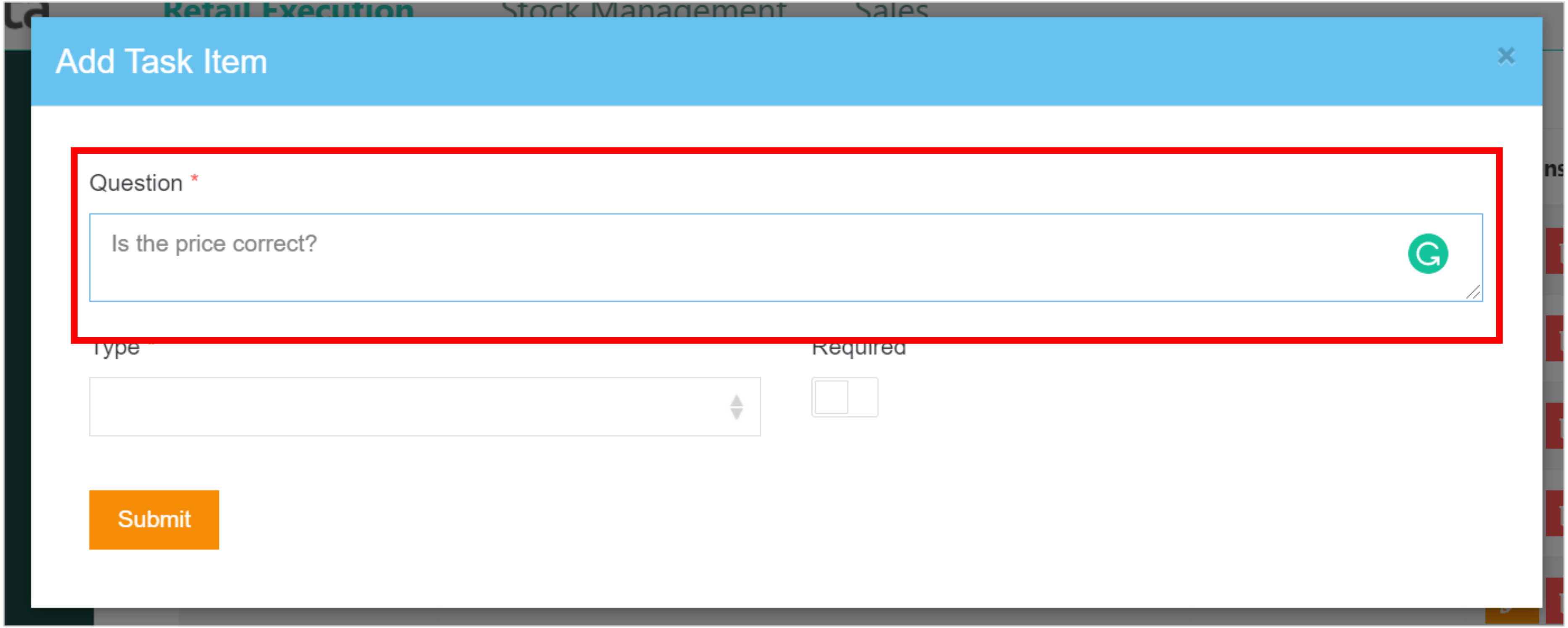
8. Type the task item in the box.



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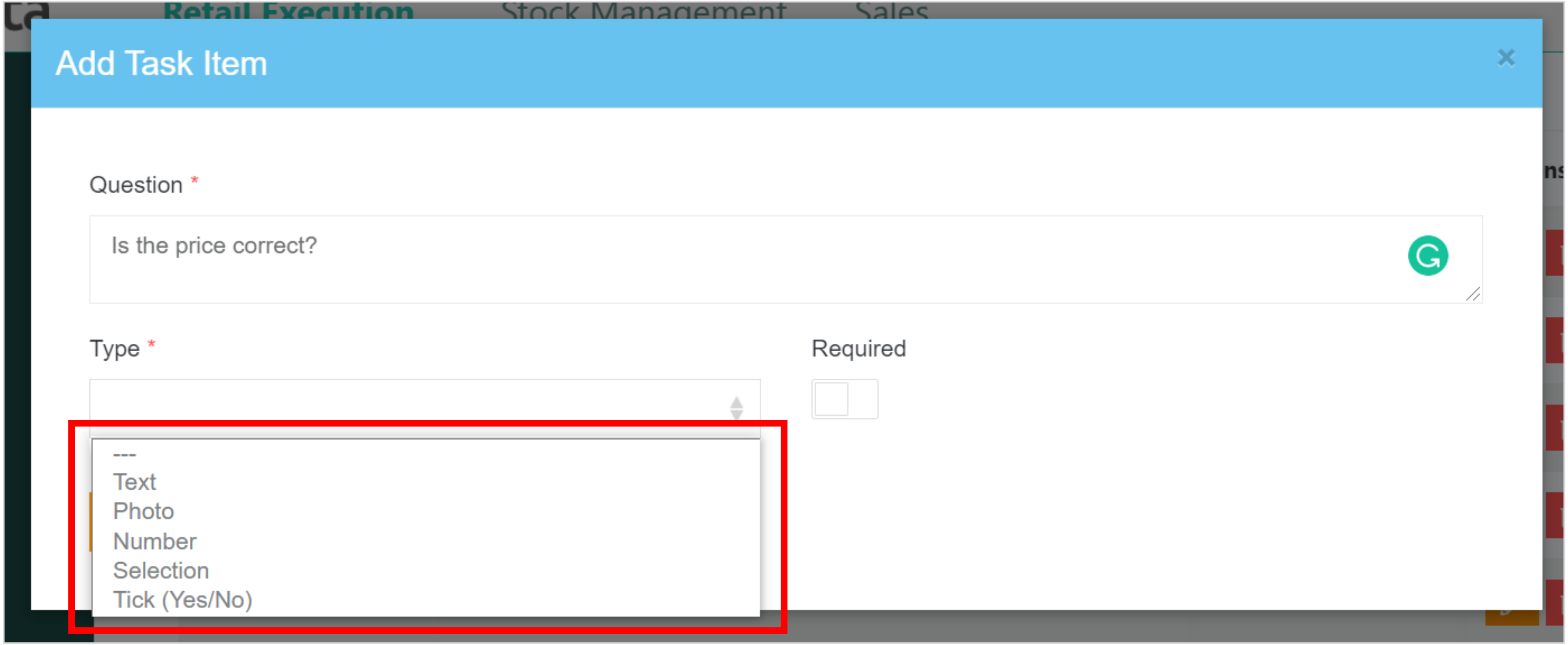
9. Select the proper answer type: text, photo, number, selection, tick (yes/no)



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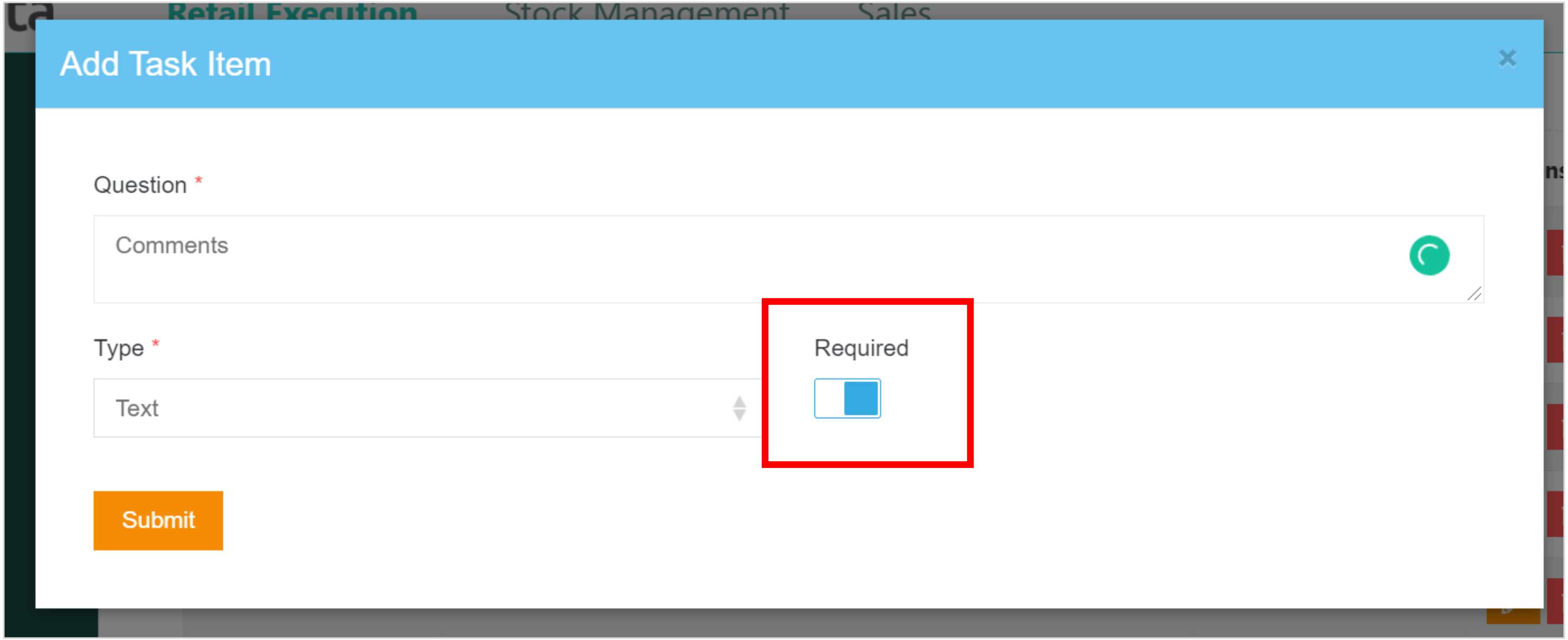
10. You may also set each task item as required or not.



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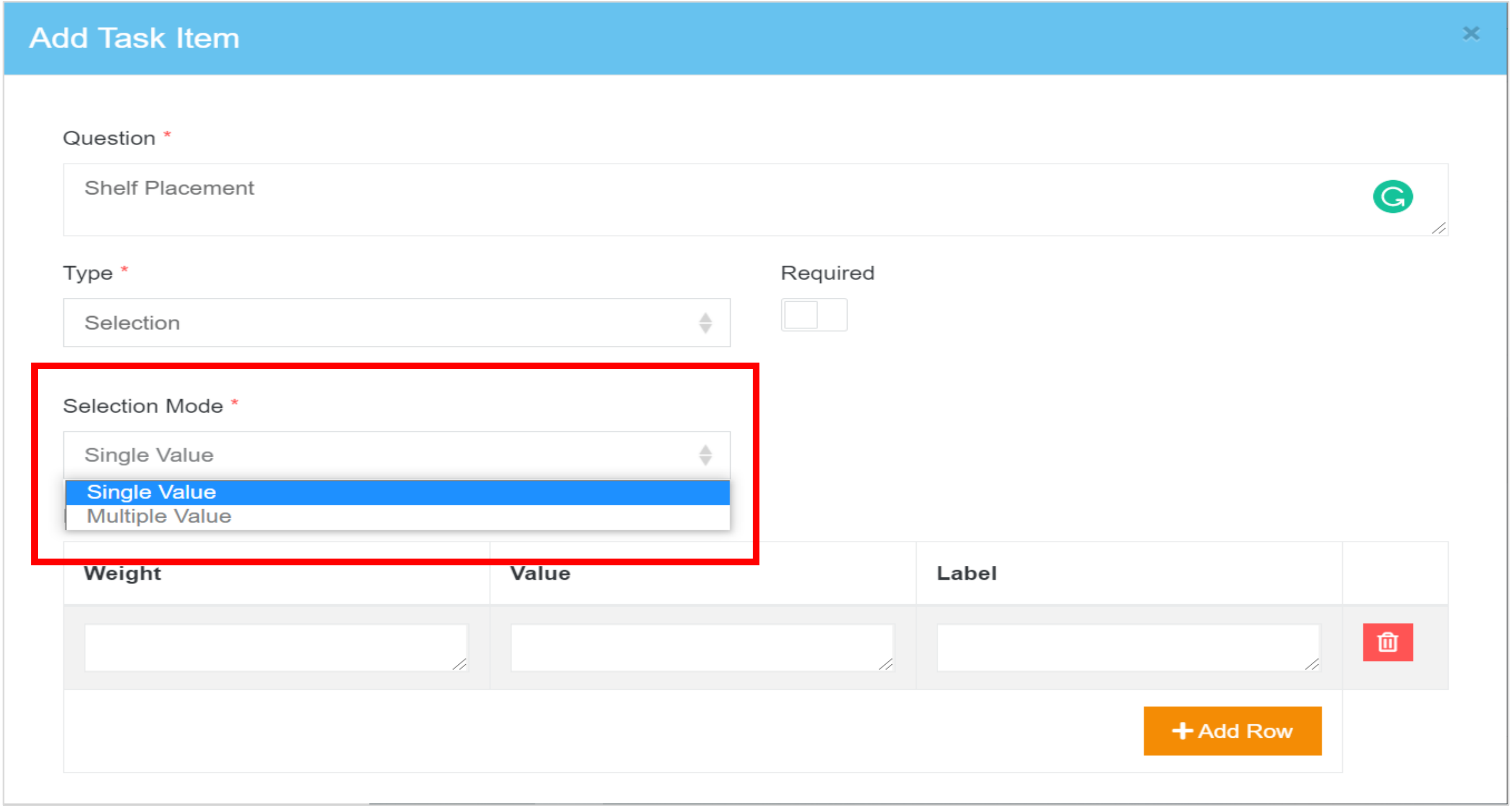
11. For selection or multiple choice, there are 2 modes: single or multiple



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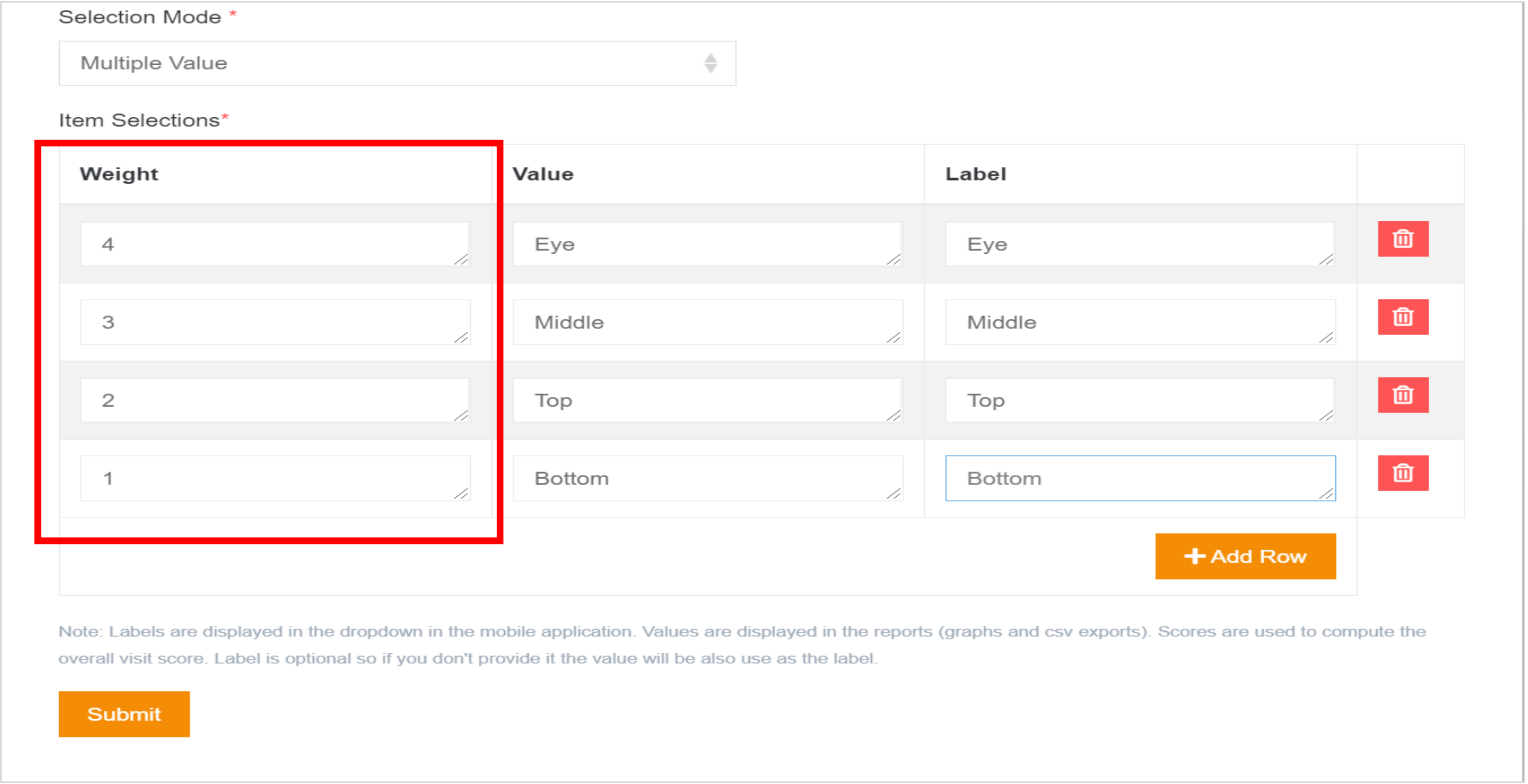
12. Under the Weight column, you assign a numerical equivalent to the values which are then summed up and displayed as scores in the reports.



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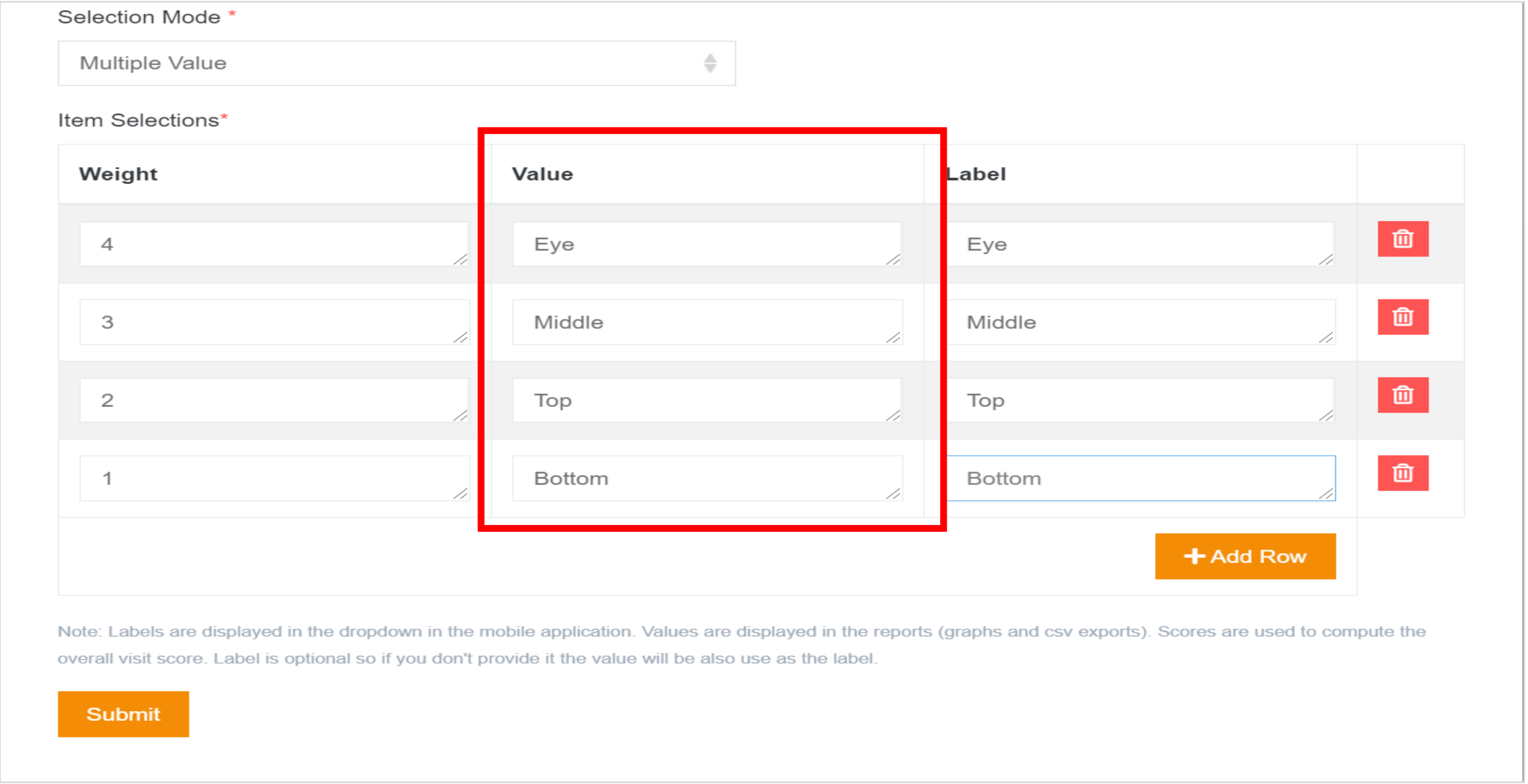
13. Under the Value column, you assign in here the value to be displayed in the reports.



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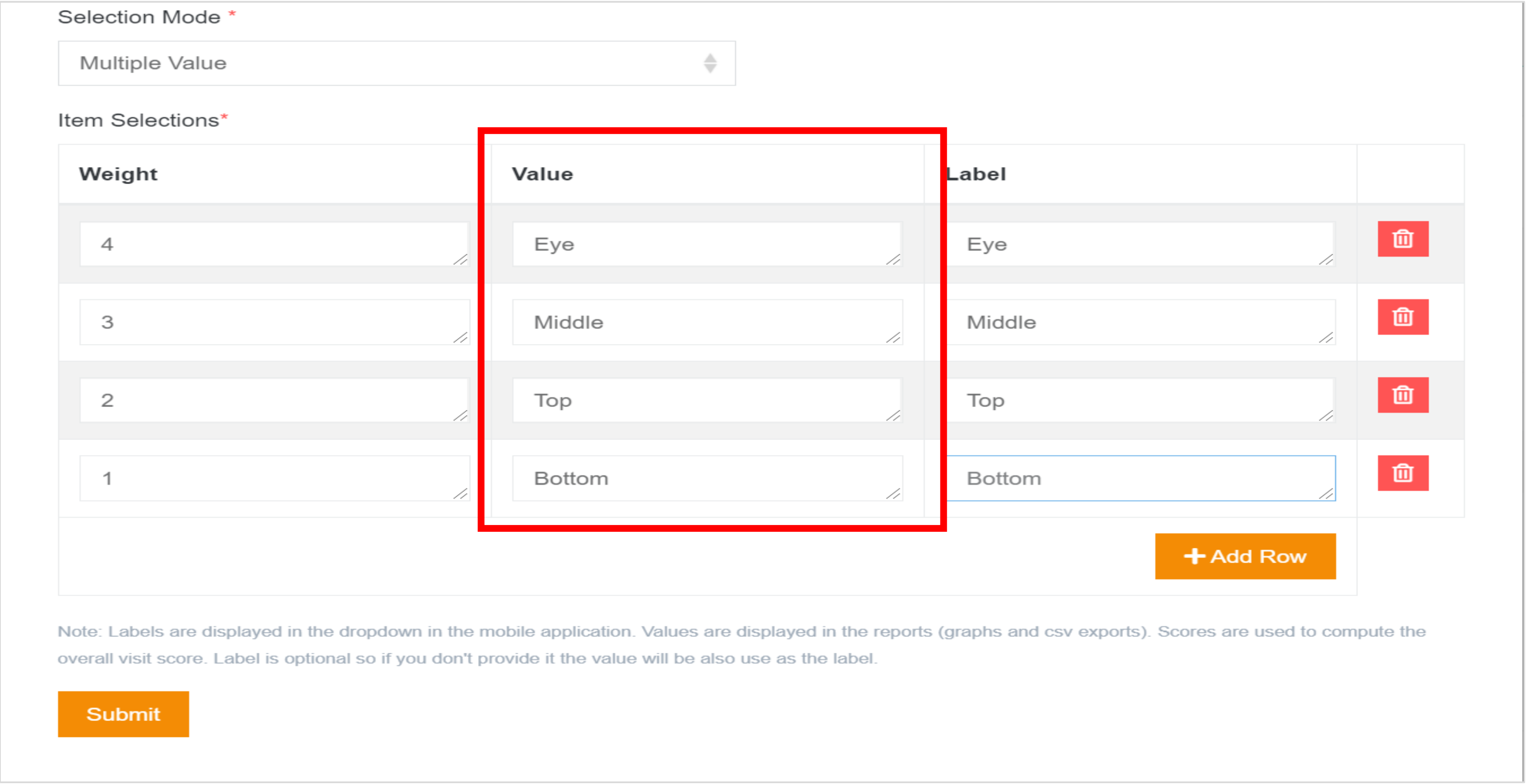
14. Under the Label column, you assign in here the label for the value as displayed in the app. For example, the labels can be in native language while the values can be in English.



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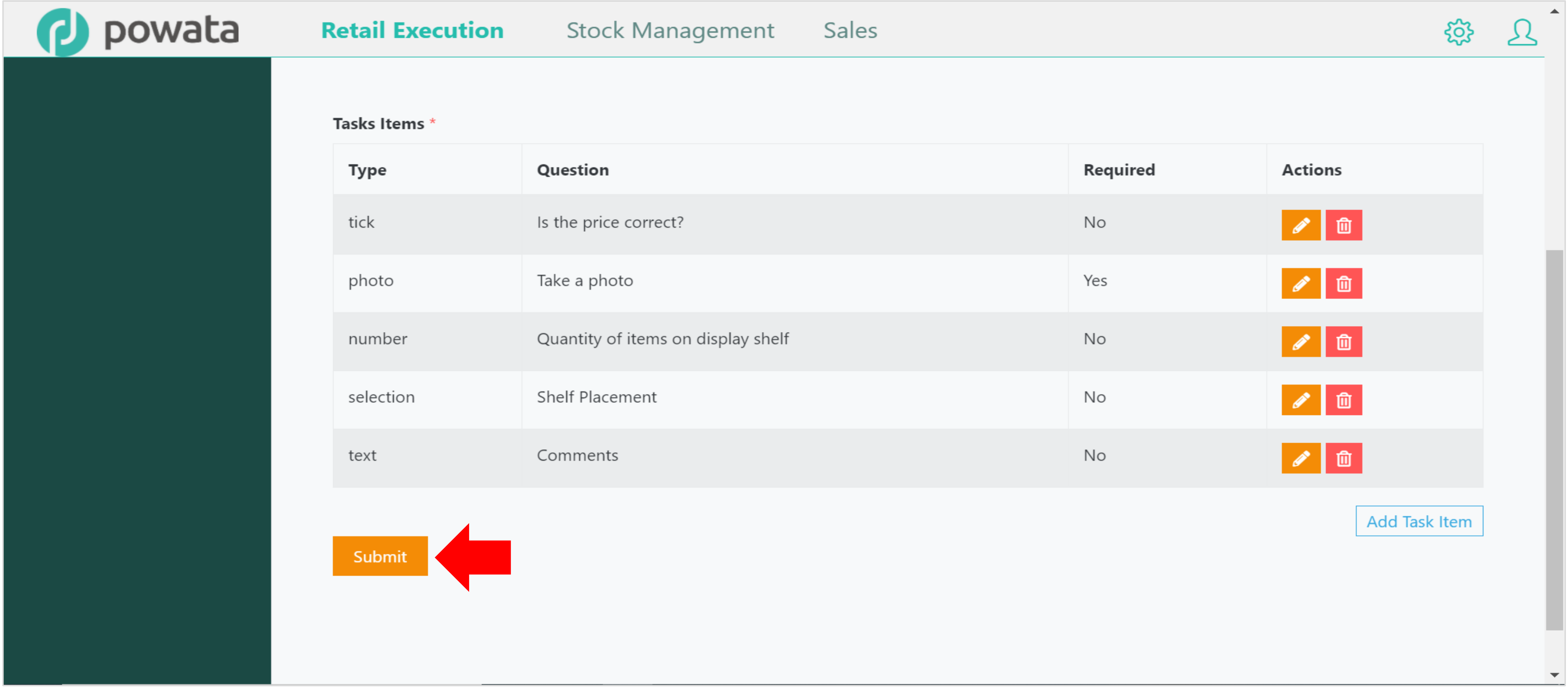
15. When finished adding all the task items, click on the Submit button.



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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.