



# OptimMerchandising – How to Create and Assign Planogram Pictures to Locations

1. Go to [app.optimmerchandising.com](http://app.optimmerchandising.com) and log in with the manager or supervisor credentials.
2. Add a planogram. Go to Settings > Location Settings > Planogram Pictures > Add Planogram

The screenshot shows the OptimMerchandising web application interface. The top navigation bar includes the 'powata' logo and menu items for 'Retail Execution', 'Stock Management', and 'Sales'. On the right side of the top bar, there is a settings gear icon (labeled '1') and a user profile icon. Below the top bar, the left sidebar contains a list of menu items: 'Company Settings', 'Manage Users', 'Location Settings' (labeled '2'), 'Clients', 'Retailers', 'Planogram Pictures' (labeled '3'), and 'Product Settings'. The main content area is titled 'Planogram' and features a search bar, a 'Display 10 records' dropdown, and three orange action buttons: 'Assign Planogram to Locations', 'View Planogram Locations', and 'Add Planogram' (labeled '4'). An 'Export CSV' button is also present. Below the buttons is a table with the following data:

Unique ID	Name	Client	From	To	Actions
1	Pringles	Pringles	2019-01-28	2019-03-27	
3	Alpo Planogram 2019	Alpo	2019-01-01	2019-12-31	
5	Tide Detergent Planogram 2019 (FairPrice City Square Mall)	Tide	2019-01-01	2019-12-31	



## OptimMerchandising – How to Create and Assign Planogram Pictures to Locations

3. Fill-in the fields. All fields are required.

 Add Planogram

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Name \*

Note \*

From \*

To \*

Client\*

Image \*  No file chosen



# OptimMerchandising – How to Create and Assign Planogram Pictures to Locations

4. Click on Choose Files to upload the pictures. You can select multiple pictures to upload at once.

The screenshot displays the Powata application interface. The top navigation bar includes 'Retail Execution', 'Stock Management', and 'Sales'. A sidebar on the left contains various menu items, with 'Planogram Pictures' highlighted. A file selection dialog is open, showing a folder named 'Planogram Photos' containing several image files: 'Dr. Martens (1)', 'Dr. Martens (2)', 'Planogram (Tide)', 'Planogram 1 (Alpo)', 'Planogram 2', and 'Planogram'. The dialog has 'Open' and 'Cancel' buttons. In the background, a form for creating a planogram is visible, with fields for 'Note \*' (containing 'planogram pictures'), 'To \*' (containing '2021-12-31'), and 'Image \*'. A red arrow points to the 'Choose Files' button in the 'Image \*' field.



## OptimMerchandising – How to Create and Assign Planogram Pictures to Locations

5. Click on Submit.

 Add Planogram

---

Name \*

Note \*

From \*

To \*

Client\*

Image \*  6 files





# OptimMerchandising – How to Create and Assign Planogram Pictures to Locations

6. Click on Assign Planogram to Locations.

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 'Planogram Pictures' selected. The main content area is titled 'Planogram' and features a search bar, a red arrow pointing to the 'Assign Planogram to Locations' button, and other buttons like 'View Planogram Locations' and 'Add Planogram'. Below the buttons is a table with columns for Unique ID, Name, Client, From, To, and Actions.

Unique ID	Name	Client	From	To	Actions
1	Pringles	Pringles	2019-01-28	2019-03-27	
3	Alpo Planogram 2019	Alpo	2019-01-01	2019-12-31	
5	Tide Detergent Planogram 2019 (FairPrice City Square Mall)	Tide	2019-01-01	2019-12-31	



## OptimMerchandising – How to Create and Assign Planogram Pictures to Locations

7. Select the planogram and retailer from the list. Then, tick the boxes in front of the locations on the left column. Click on Add to transfer them to the right column.

 Assign Planogram to Locations

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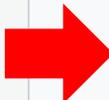
Planogram \* Retailer \*

Planogram Pictures 7-Eleven

Location \*

Search...

<input type="checkbox"/> Locations To Select	Columns
<input checked="" type="checkbox"/> 7 - Eleven Kho Tong 102- YUSEN	
<input checked="" type="checkbox"/> 7 - Eleven 201B Nguyen Chi Thanh	
<input checked="" type="checkbox"/> 7-11 Le Loi	
<input checked="" type="checkbox"/> 7-11 Ton That Tung	
<input checked="" type="checkbox"/> 7 - Eleven Landcanter D1	
<input type="checkbox"/> 7 - Eleven Lux6-SH08- Vinhomes Golden River	
<input type="checkbox"/> 7-11 Ton Duc Thang	
<input type="checkbox"/> 7-11 Nguyen Du	

Add >>

<< Remove

Search...

<input type="checkbox"/> Locations Selected	Columns
<input type="checkbox"/> Vinmart+ A65 Bach Dang	



# OptimMerchandising – How to Create and Assign Planogram Pictures to Locations

8. Click on Submit.

The screenshot displays the location selection interface. On the left, a search bar is followed by a list of locations under the heading 'Locations To Select'. The list includes:

- Locations To Select
- 7 - Eleven Lux6-SH08- Vinhomes Golden River
- 7-11 Ton Duc Thang
- 7-11 Nguyen Du
- 7-11 Ton Dat Tien 1
- 7-11 Ton Dat Tien
- 7 - Eleven 39-39B Ben Van Don
- 7 - Eleven 151-155 Ben Van Don
- 7 - Eleven 187A Le Van Luong
- 7 - Eleven 21B Duong Hau Giang
- 7-11 Nguyen Thi Minh Khai
- 7 - Eleven 92 Nguyen Huu Canh

In the center, there are two buttons: an orange 'Add >>' button and a red '<< Remove' button.

On the right, a search bar is followed by a list of locations under the heading 'Locations Selected'. The list includes:

- Locations Selected
- Vinmart+ A65 Bach Dang
- 7 - Eleven Kho Tong 102- YUSEN
- 7 - Eleven 201B Nguyen Chi Thanh
- 7-11 Le Loi
- 7-11 Ton That Tung
- 7 - Eleven Landcanter D1

At the bottom right, a red arrow points to an orange 'Submit' button.



# OptimMerchandising – How to Create and Assign Planogram Pictures to Locations

9. To view the planogram assignments, click on View Planogram Locations.

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 'Planogram Pictures' highlighted. The main content area is titled 'Planogram' and features a search bar, a display count of 10 records, and three action buttons: 'Assign Planogram to Locations', 'View Planogram Locations' (highlighted with a red box), and 'Add Planogram'. An 'Export CSV' button is also present in the top right. Below the buttons is a table with the following data:

Unique ID	Name	Client	From	To	Actions
1	Pringles	Pringles	2019-01-28	2019-03-27	  
3	Alpo Planogram 2019	Alpo	2019-01-01	2019-12-31	  
5	Tide Detergent Planogram 2019 (FairPrice City Square Mall)	Tide	2019-01-01	2019-12-31	  



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10. All planogram assignments are displayed in the table. You may use the filter to view only select records. Also, you can remove an assignment by using the delete function under Actions column.

☰ Associated Planogram to Locations

Planogram  Locations  Filter Assign Planogram to Locations

Planogram	Location	Action
Haribo Instore Display	Vinmart+ 85A Quoc Lo 13	
Planogram Pictures	Vinmart+ A65 Bach Dang	
Planogram Pictures	7 - Eleven Kho Tong 102- YUSEN	
Planogram Pictures	7 - Eleven 201B Nguyen Chi Thanh	
Planogram Pictures	7-11 Le Loi	
Planogram Pictures	7-11 Ton That Tung	
Planogram Pictures	7 - Eleven Landcanter D1	



# OptimMerchandising – How to Create and Assign Planogram Pictures to Locations

11. To change the planogram assignments, click on the Assign Planogram to Locations.

The screenshot displays the Powata application interface for managing planograms. The sidebar on the left includes options for Company Settings, Manage Users, Location Settings, Clients, Retailers, Planogram Pictures (highlighted), and Product Settings. The main header shows 'Retail Execution', 'Stock Management', and 'Sales'. The central area is titled 'Planogram' and features a search bar, a red arrow pointing to the 'Assign Planogram to Locations' button, and other buttons for 'View Planogram Locations' and 'Add Planogram'. Below the buttons is a 'Display 10 records' dropdown. The main content is a table with the following data:

Unique ID	Name	Client	From	To	Actions
1	Pringles	Pringles	2019-01-28	2019-03-27	
3	Alpo Planogram 2019	Alpo	2019-01-01	2019-12-31	
5	Tide Detergent Planogram 2019 (FairPrice City Square Mall)	Tide	2019-01-01	2019-12-31	



## OptimMerchandising – How to Create and Assign Planogram Pictures to Locations

12. Select the planogram and retailer from the list. Then, tick the boxes in front of the locations on the right column. Click on Remove to transfer them back to the left column.

Assign Planogram to Locations

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Planogram \* Retailer \*

Planogram Pictures 7-Eleven

Location \*

Search...		Columns	Search...		Columns
<input type="checkbox"/> Locations To Select			<input type="checkbox"/> Locations Selected		
<input type="checkbox"/> 7 - Eleven Lux6-SH08- Vinhomes Golden River			<input type="checkbox"/> Vinmart+ A65 Bach Dang		
<input type="checkbox"/> 7-11 Ton Duc Thang			<input checked="" type="checkbox"/> 7 - Eleven Kho Tong 102- YUSEN		
<input type="checkbox"/> 7-11 Nguyen Du			<input checked="" type="checkbox"/> 7 - Eleven 201B Nguyen Chi Thanh		
<input type="checkbox"/> 7-11 Ton Dat Tien 1			<input checked="" type="checkbox"/> 7-11 Le Loi		
<input type="checkbox"/> 7-11 Ton Dat Tien			<input checked="" type="checkbox"/> 7-11 Ton That Tung		
<input type="checkbox"/> 7 - Eleven 39-39B Ben Van Don			<input checked="" type="checkbox"/> 7 - Eleven Landcenter D1		
<input type="checkbox"/> 7 - Eleven 151-155 Ben Van Don					
<input type="checkbox"/> 7 - Eleven 187A Le Van Luong					

Add >>

<< Remove



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13. Click on Submit.

The screenshot displays the interface for assigning planogram pictures to locations. It features two side-by-side panels, each with a search bar and a list of locations. The left panel is titled 'Locations To Select' and contains a list of 12 locations, each with an unchecked checkbox. The right panel is titled 'Locations Selected' and contains one location, 'Vinmart+ A65 Bach Dang', with an unchecked checkbox. Between the panels are two buttons: an orange 'Add >>' button and a red '<< Remove' button. At the bottom right, a large red arrow points to an orange 'Submit' button.

Search...	Columns
<input type="checkbox"/> Locations To Select	
<input type="checkbox"/> 7 - Eleven Lux6-SH08- Vinhomes Golden River	
<input type="checkbox"/> 7-11 Ton Duc Thang	
<input type="checkbox"/> 7-11 Nguyen Du	
<input type="checkbox"/> 7-11 Ton Dat Tien 1	
<input type="checkbox"/> 7-11 Ton Dat Tien	
<input type="checkbox"/> 7 - Eleven 39-39B Ben Van Don	
<input type="checkbox"/> 7 - Eleven 151-155 Ben Van Don	
<input type="checkbox"/> 7 - Eleven 187A Le Van Luong	
<input type="checkbox"/> 7 - Eleven 21B Duong Hau Giang	
<input type="checkbox"/> 7-11 Nguyen Thi Minh Khai	
<input type="checkbox"/> 7 - Eleven 92 Nguyen Huu Canh	

Search...	Columns
<input type="checkbox"/> Locations Selected	
<input type="checkbox"/> Vinmart+ A65 Bach Dang	

Buttons: Add >>, << Remove, Submit



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14. On the mobile app, the planogram pictures are displayed in smart tasks for the visit locations.

