OptimMerchandising – How to Create and Assign a Store Model to a Retailer

1. Go to app.optimmerchandising.com and log in with the manager or supervisor credentials.
2. Create a store model. Go to Settings > Product Settings > Store Models > Add Store Model

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3. Fill-in all the required fields such as name, client, including the effective start and end dates.

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4. Add products and set the recommended quantity and number of facing.

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5. You can also add products by import. Click on the Export Sample CSV to download the template then populate the cells with your data.

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6. Click on the Import CSV button and choose the template file.

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7. You can also attach planograms which will be displayed in smart tasks on the mobile app.

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8. When you added all the products, click Submit.

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9. After you created a store model, you must now assign it to locations. You may create a unique store model for each location.

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10. Choose the store model from the list.

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11. On the left column, tick the boxes before the locations that need to be assigned.
12. Click the Add button to move those locations to the right column.

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13. Click Submit.

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14. A message appears confirming the store model assignment to location.