



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

1. Go to [app.optimmerchandising.com](http://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

The screenshot shows the Powata web application interface. The top navigation bar includes 'Retail Execution', 'Stock Management', and 'Sales'. A sidebar on the left contains a menu with items like 'Company Settings', 'Manage Users', 'Location Settings', 'Product Settings', 'Packings', 'Categories', 'Brands', 'Products', 'Store Models', 'Price Lists', and 'Mapping'. The 'Store Models' item is highlighted in teal. The main content area is titled 'Store Models' and features a 'Filter Results' section with dropdowns for 'Select Client' and 'Select Retailer', and a 'Filter' button. Below this is a search bar and three orange buttons: 'Add Store Model to Location', 'View Store Model - Locations', and 'Add Store Model'. A table below displays a list of store models with columns for 'Store Model Name', 'Client', 'From Date', 'To Date', 'Retailer', 'Location Grade', and 'Actions'. The table contains three rows of data. Red arrows with numbers 1, 2, 3, and 4 point to the settings gear icon, 'Product Settings' in the sidebar, 'Store Models' in the sidebar, and the 'Add Store Model' button respectively.

app.optimmerchandising.com/#/store-model?page=1

powata Retail Execution Stock Management Sales

Store Models

Export CSV

Filter Results

Select Client Select Retailer Filter

Search.. Add Store Model to Location View Store Model - Locations Add Store Model

Display 10 records

| <input type="checkbox"/> | Store Model Name                        | Client   | From Date  | To Date    | Retailer  | Location Grade | Actions |
|--------------------------|---|----------|------------|------------|-----------|----------------|---------|
| <input type="checkbox"/> | Tide 7-Eleven Store Model 1st Half 2019 | Tide     | 2019-01-01 | 2019-06-30 | 7-Eleven  | Grade A        |         |
| <input type="checkbox"/> | Pringles FairPrice Store Model 2019     | Pringles | 2019-01-01 | 2019-12-31 | FairPrice | Grade A        |         |
| <input type="checkbox"/> | Dove Store Model Grade A 2019           | Dove     | 2019-01-01 | 2019-12-31 | 7-Eleven  | Grade A        |         |



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

The screenshot shows the 'Add Store Model' page in the OptimMerchandising application. The browser address bar shows the URL: `app.optimmerchandising.com/#/store-model/add`. The application header includes the 'powata' logo and navigation tabs for 'Retail Execution', 'Stock Management', and 'Sales'. A left sidebar contains a menu with options like 'Company Settings', 'Manage Users', 'Location Settings', 'Product Settings', 'Packings', 'Categories', 'Brands', 'Products', 'Store Models' (highlighted), 'Price Lists', and 'Mapping'. The main content area is titled 'Add Store Model' and contains the following form fields:

- Name \***: Text input containing 'Dove Store Model 2020 (Watsons)'
- Client \***: Dropdown menu with 'Dove' selected
- Retailer**: Dropdown menu with 'Watsons' selected
- Location Grade**: Dropdown menu with 'Grade A' selected
- From \***: Date input containing '2020-01-01'
- To \***: Date input containing '2020-12-31'

Below the form is a section for 'Products' with an 'Export Sample CSV' button. A table with the following columns is shown:

| Name               | SKU Code | Category | Product label | Recommended Quantity | Number of facing | MSL | Actions |
|--------------------|----------|----------|---------------|----------------------|------------------|-----|---------|
| No products added. |          |          |               |                      |                  |     |         |

At the bottom right of the page, there are 'Import CSV' and 'Add Product' buttons.



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

**Add Product**

Product Name \*  
Dove Men+Care Anti Dandruff Shampoo 340ml

Barcode \*  
4800952716321

Recommended Quantity  
100

Number of facing  
5

Must Stock List

Submit

Export Sample CSV

MSL Actions

Import CSV Add Product



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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.

The screenshot displays the OptimMerchandising application interface. The main window shows a table with columns for 'Number of facing', 'MSL', and 'Actions'. The 'Actions' column contains edit and delete icons. Below the table are buttons for 'Import CSV' and 'Add Product'. A red-bordered window titled 'product\_import\_store\_model - Excel' is overlaid on the application, showing a spreadsheet with the following data:

| product_name                              | barcode       | recommended_quantity | number_facing | msl |
|---|---------------|----------------------|---------------|-----|
| Dove Men+Care Anti Dandruff Shampoo 340ml | 4800952716321 | 25                   | 25            | 1   |
| Dove Men+Care Strengthening Shampoo 340ml | 4800952716323 | 11                   | 21            | 1   |

An 'Export Sample CSV' button is highlighted with a red arrow pointing to the 'Actions' column of the table in the background application.



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

The screenshot shows the OptimMerchandising web application interface. The browser address bar displays `app.optimmerchandising.com/#/store-model/add`. The application header includes the 'powata' logo and navigation tabs for 'Retail Execution', 'Stock Management', and 'Sales'. A left sidebar contains 'Price Lists' and 'Mapping' options. The main content area features a table with columns 'Number of facing', 'MSL', and 'Actions'. An 'Export Sample CSV' button is located above the table. Below the table, there are 'Import CSV' and 'Add Product' buttons. A Windows file explorer dialog box is overlaid on the screen, showing the 'Downloads' folder. The file 'product\_import\_store\_model' (Microsoft Excel Comma Separate... 189 bytes) is selected. Other files in the 'Today' group include 'OOS - Report' (912 KB), 'OOS - Report JanFeb2020 (1)' (216 KB), 'OOS - Report JanFeb2020' (216 KB), and 'Master Visit Report' (11.9 KB). The 'Earlier this week' group contains '2020 Questions for Data collection (2)'. The 'File name' field at the bottom of the dialog is set to 'product\_import\_store\_model', and the 'Open' button is highlighted.

| Number of facing | MSL | Actions  |
|------------------|-----|--|
| 5                | Yes | <br> |
| 5                | Yes | <br> |
| 5                | Yes | <br> |



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

The screenshot displays the OptimMerchandising web application interface. The top navigation bar includes the 'powata' logo and menu items for 'Retail Execution', 'Stock Management', and 'Sales'. A left sidebar contains 'Price Lists' and 'Mapping'. The main content area is titled 'Products' and lists three items: 'Dove Men+Care Anti Dandruff Shampoo 340ml', 'Dove Men+Care Refreshing Clean Shampoo 340ml', and 'Dove Men+Care Strengthening Shampoo 170ml'. Below the product list, there is a 'Planogram' section with a 'Choose File' button and a text input field containing 'Planogram.jpg'. A red box highlights a Windows file explorer dialog box that is open over the application. The dialog shows the path 'Desktop > Demo Account > Planogram Photos' and contains three preview thumbnails: 'Planogram (Tide)', 'Planogram 1 (Alpo)', and 'Planogram 2'. The 'Planogram 1 (Alpo)' thumbnail is selected. The dialog also shows a file name field and 'Open' and 'Cancel' buttons. A red arrow points from the 'Choose File' button in the application to the file explorer dialog.



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

The screenshot shows the OptimMerchandising web application interface. The browser address bar displays `app.optimmerchandising.com/#/store-model/add`. The application header includes the 'powata' logo and navigation tabs for 'Retail Execution', 'Stock Management', and 'Sales'. A left sidebar contains 'Price Lists' and 'Mapping' options. The main content area is titled 'Products' and features an 'Export Sample CSV' button. Below this is a table with the following data:

| Name   | SKU Code  | Category  | Product label      | Recommended Quantity | Number of facing | MSL | Actions   |
|--|-----------|-----------|--------------------|----------------------|------------------|-----|---|
| Dove Men+Care Anti Dandruff Shampoo 340ml    | DOV-MS001 | Hair Care | Dove Men's Shampoo | 100                  | 5                | Yes |   |
| Dove Men+Care Refreshing Clean Shampoo 340ml | DOV-MS002 | Hair Care | Dove Men's Shampoo | 150                  | 5                | Yes |   |
| Dove Men+Care Strengthening Shampoo 170ml    | DOV-MS003 | Hair Care | Dove Men's Shampoo | 300                  | 5                | Yes |   |

Below the table are 'Import CSV' and 'Add Product' buttons. At the bottom, there is a 'Planogram' section with a file upload field labeled 'Choose File' and 'No file chosen'. A prominent orange 'Submit' button is located at the bottom left, with a large red arrow pointing to it from the right.



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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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The main content area is titled 'Store Models' and features a 'Filter Results' section. This section includes two dropdown menus: 'Select Client' and 'Select Retailer'. A red arrow points to the 'Select Retailer' dropdown. To the right of these dropdowns is an orange 'Filter' button. Below the dropdowns is a search input field with the placeholder text 'Search..'. To the right of the search field are three orange buttons: 'Add Store Model to Location', 'View Store Model - Locations', and 'Add Store Model'. There is also an 'Export CSV' button in the top right corner of the main content area.

Below the filter section, there is a 'Display' dropdown set to '10 records'. The main data is presented in a table with the following columns: 'Store Model Name', 'Client', 'From Date', 'To Date', 'Retailer', 'Location Grade', and 'Actions'. The table contains three rows of data:

| <input type="checkbox"/> | Store Model Name                        | Client   | From Date  | To Date    | Retailer  | Location Grade | Actions  |
|--------------------------|---|----------|------------|------------|-----------|----------------|--|
| <input type="checkbox"/> | Tide 7-Eleven Store Model 1st Half 2019 | Tide     | 2019-01-01 | 2019-06-30 | 7-Eleven  | Grade A        | <input type="checkbox"/> <input type="edit"/> <input type="delete"/> |
| <input type="checkbox"/> | Pringles FairPrice Store Model 2019     | Pringles | 2019-01-01 | 2019-12-31 | FairPrice | Grade A        | <input type="checkbox"/> <input type="edit"/> <input type="delete"/> |
| <input type="checkbox"/> | Dove Store Model Grade A 2019           | Dove     | 2019-01-01 | 2019-12-31 | 7-Eleven  | Grade A        | <input type="checkbox"/> <input type="edit"/> <input type="delete"/> |



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10. Choose the store model from the list.

The screenshot displays the 'Add Store Model to Locations' page in the Powata application. The left sidebar contains a navigation menu with the following items: Company Settings, Manage Users, Location Settings, Product Settings, Packings, Categories, Brands, Products, Store Models (highlighted), Price Lists, and Mapping. The main content area features a title 'Add Store Model to Locations' and a dropdown menu for selecting a store model. The dropdown list includes: 'Select Store Model', 'Test Indofood Store Model', 'Hero Puri Indah Mall', 'Pringles Store Model 2019 (Giant)', 'Dove Jan-Jun 2019', 'Pringles 7-Eleven Store Model 2020', and 'Dove Store Model 2020 (Watsons)'. The 'Dove Store Model 2020 (Watsons)' option is currently selected. Below the dropdown, there are two empty table columns. The first column has a search bar and a 'Locations Selected' checkbox. The second column has a 'Columns' header. Both tables display 'No Rows To Show'. At the bottom of the interface, there are two buttons: 'Add >>' (orange) and '<< Remove' (red).



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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.

The screenshot shows the 'Add Store Model to Locations' interface in the Powata application. The left sidebar contains navigation options, with 'Store Models' highlighted. The main content area features a 'Store Model' dropdown menu set to 'Dove Store Model 2020 (Watsons)'. Below this, there are two columns for location selection. The left column, 'Locations To Select', has a search bar and a list of locations: 'Watsons Aljunied Ave 2' (checked), 'Office singapore', 'Demo', and 'Ireland'. A red arrow labeled '1' points to the checkbox for 'Watsons Aljunied Ave 2'. Below the list are 'Add >>' and '<< Remove' buttons. A red arrow labeled '2' points to the 'Add >>' button. The right column, 'Locations Selected', is currently empty and displays 'No Rows To Show'.



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13. Click Submit.

The screenshot shows the 'app.optimmerchandising.com/#/store-model-locations/add' page. The sidebar on the left has 'Store Models' selected. The main area is titled 'Locations \*' and contains two selection panels. The left panel, 'Locations To Select', lists 'Office singapore', 'Demo', and 'Ireland'. The right panel, 'Locations Selected', lists 'Watsons Aljunied Ave 2'. Between the panels are 'Add >>' and '<< Remove' buttons. A red arrow points to the 'Submit' button at the bottom right.

| Locations To Select                          | Columns |
|--|---------|
| <input type="checkbox"/> Locations To Select |         |
| <input type="checkbox"/> Office singapore    |         |
| <input type="checkbox"/> Demo                |         |
| <input type="checkbox"/> Ireland             |         |

| Locations Selected   | Columns |
|--|---------|
| <input checked="" type="checkbox"/> Locations Selected     |         |
| <input checked="" type="checkbox"/> Watsons Aljunied Ave 2 |         |

Buttons: Add >>, << Remove, Submit



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

