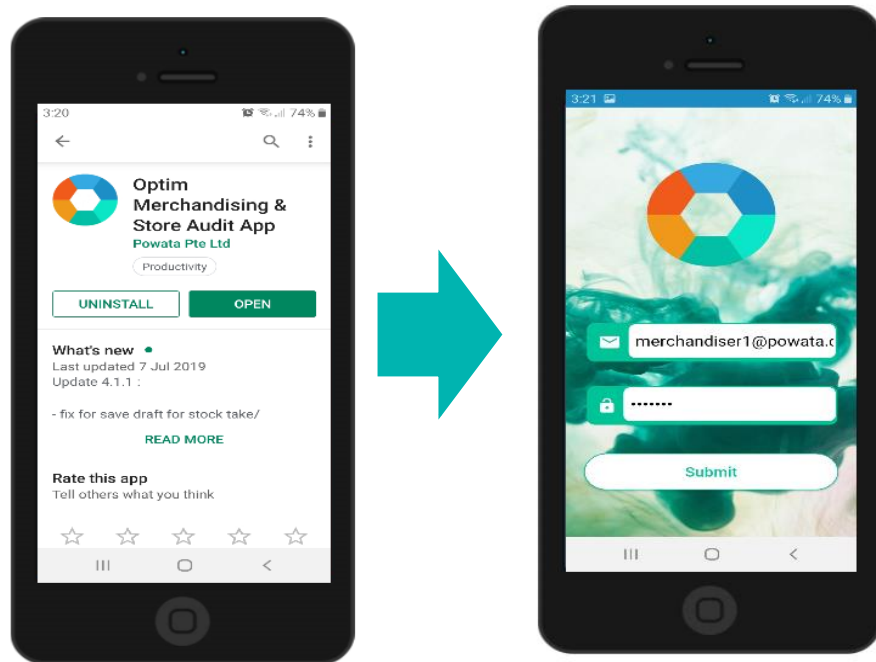
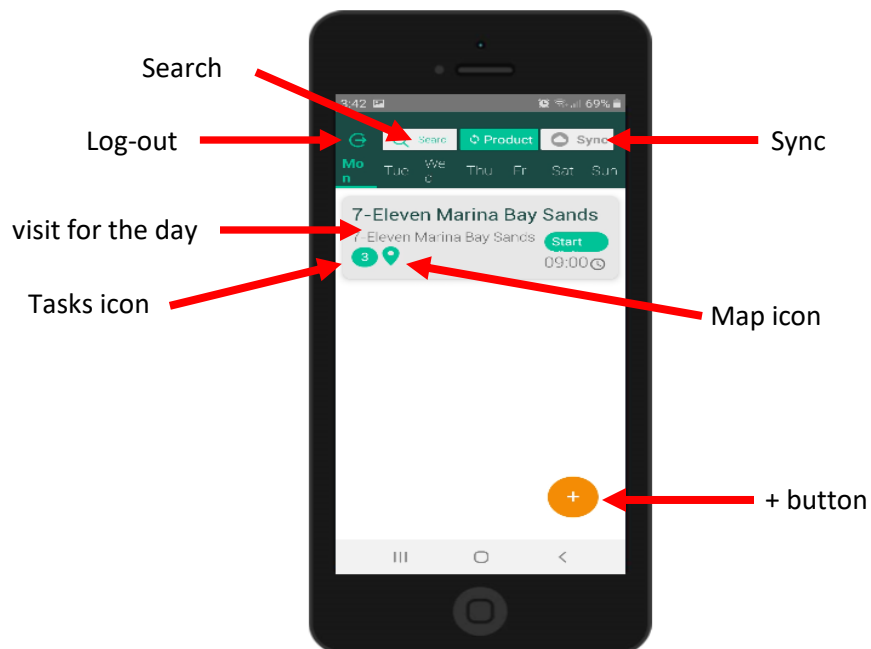


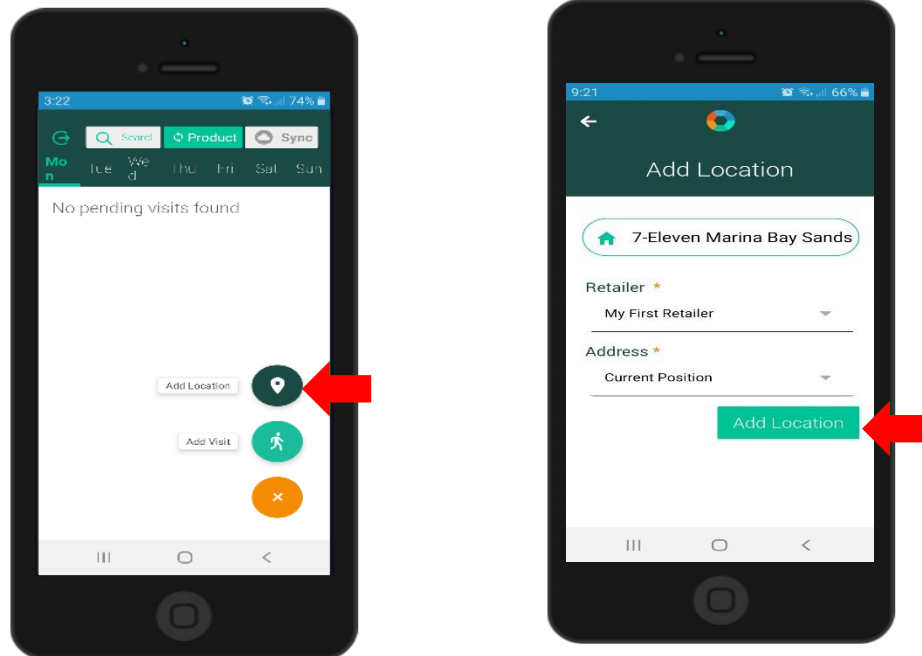
1. Download OptimMerchandising app from [Google Play](#) or [App Store](#) onto your device. Log-in with the Merchandiser credentials.



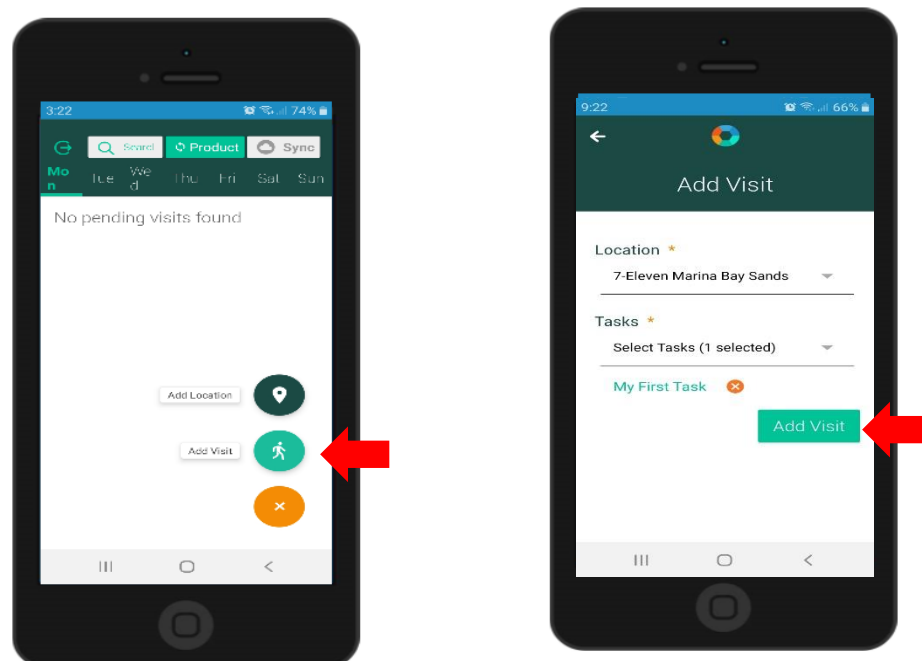
You'll be taken to the weekly dashboard, where you can see your schedule for the current week.



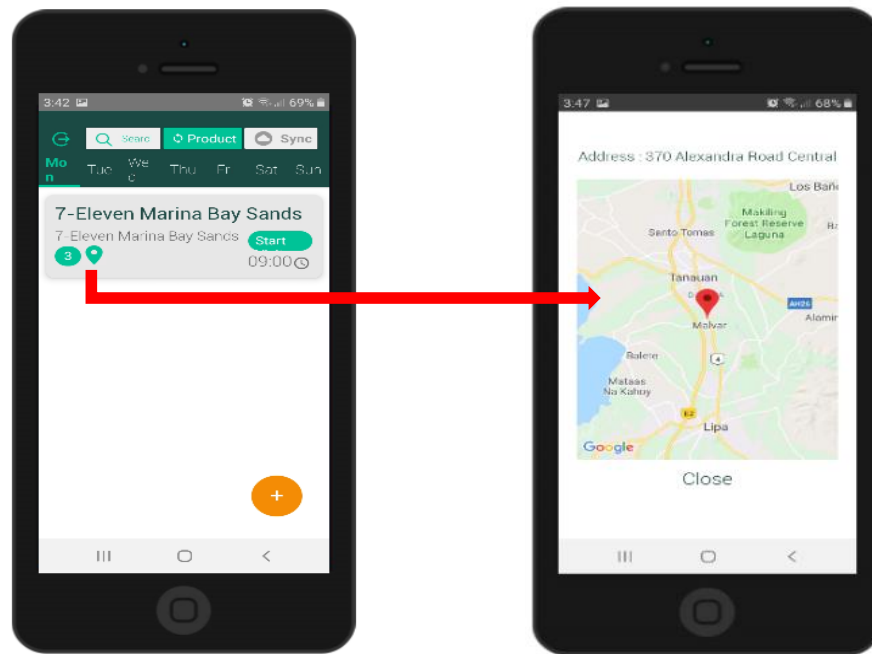
2. Create a location. Create a new location by clicking the + button and select Add Location. Write the location name and select the default retailer “My First Retailer”. You may add other retailers on the platform later on. For the address, you may choose “Current Position” which will automatically get your address based on the GPS coordinates of your current position or “Enter Address” which will require you to manually input the location address. Then click Add Location.



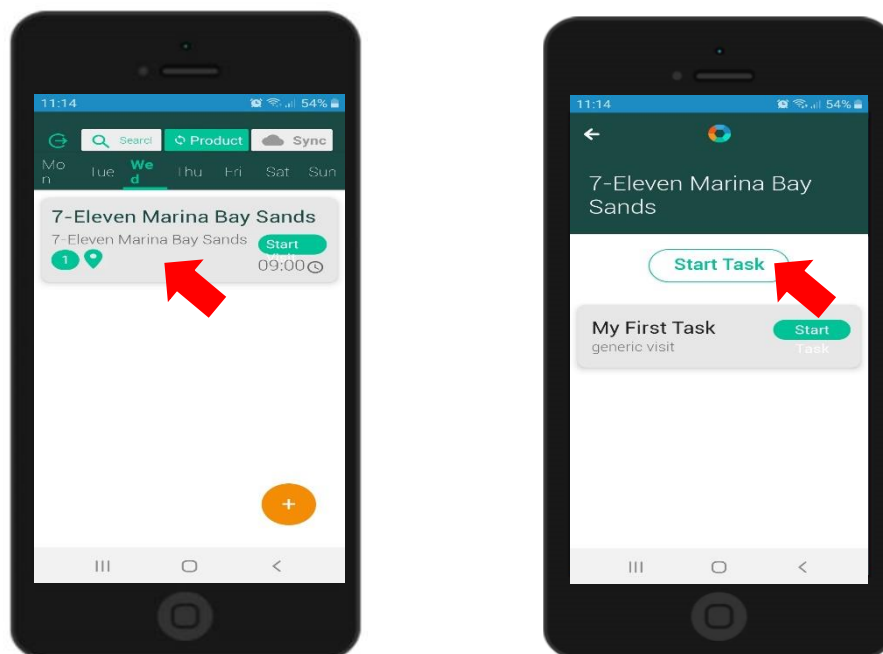
3. Create a visit. Create a new visit directly on the app. Click the + button and select Add Visit. Choose the location that you’ve created and the default task “My First Task”. Then click Add Visit.

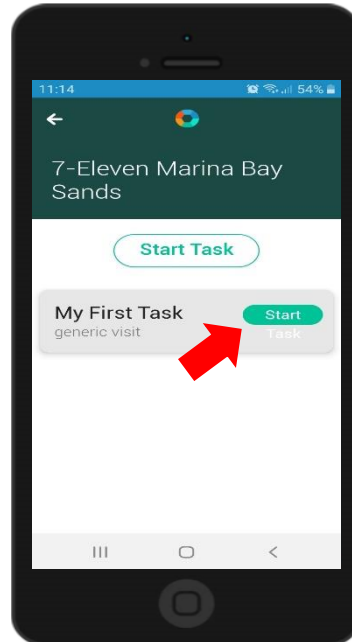
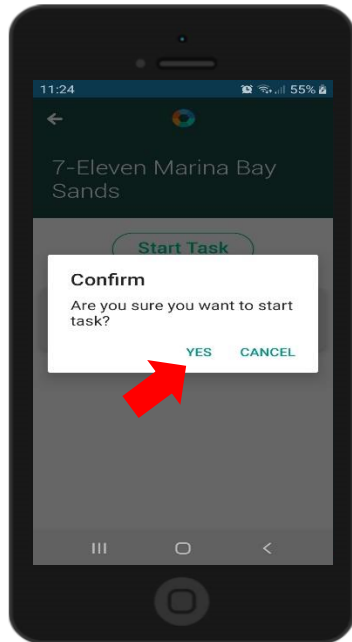


You'll be directed back to the weekly dashboard where you'll see the visit that you created. If you click the map icon, it will display the map of the visit location.

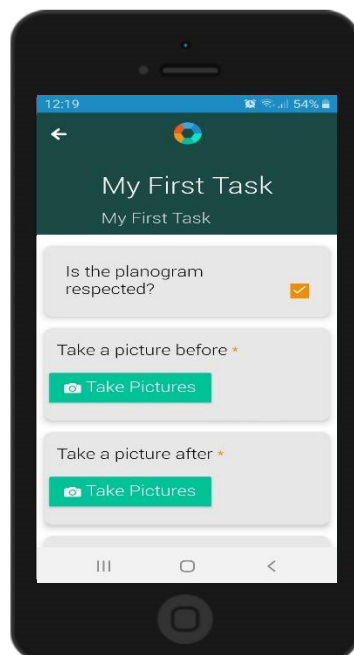


4. Conduct the visit. To open the visit, simply tap it on the screen. Then, click the big Start Task button at the top of the screen. This retrieves the GPS coordinates of your current position. You won't be able to work on any tasks without first pressing this button. Thereafter, click the smaller Start Task buttons to work on individual tasks.

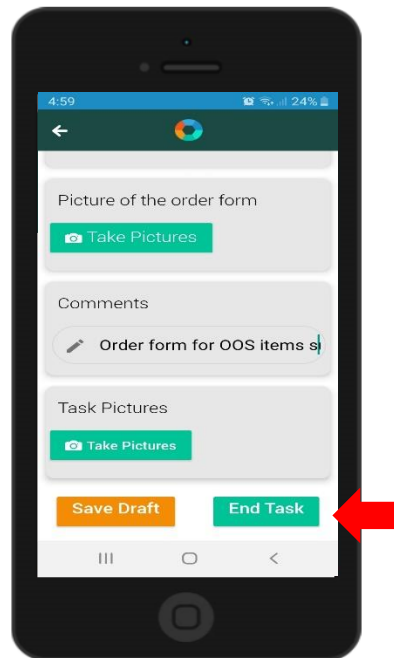




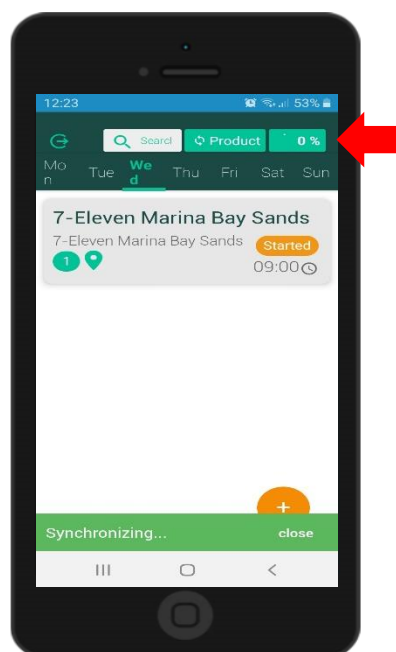
Perform all the task items such as tick the box if yes (leave it blank if no), type the quantity, write texts or take a photo.



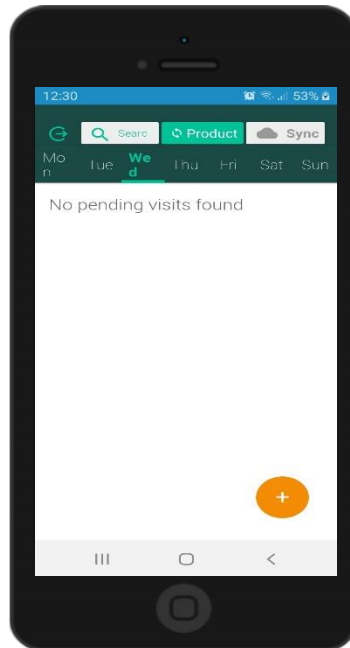
5. End Task. When you finished all the task items, click End Task to conclude the task. Please note that once you end a task, you won't be able to go back and make changes to your answers.



6. Sync the data to the server. When you end a task, you'll see that the Sync button turns green in color which indicates that there are data waiting to be synced. Tap it to start the sync process. Once the sync finishes, the button will revert to color gray.

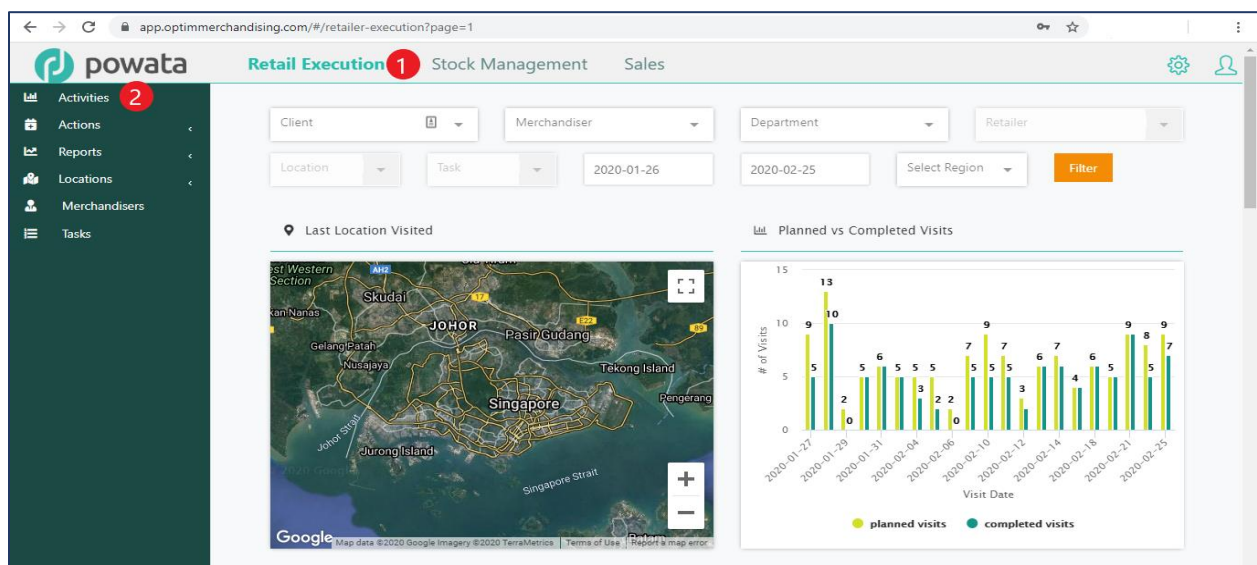


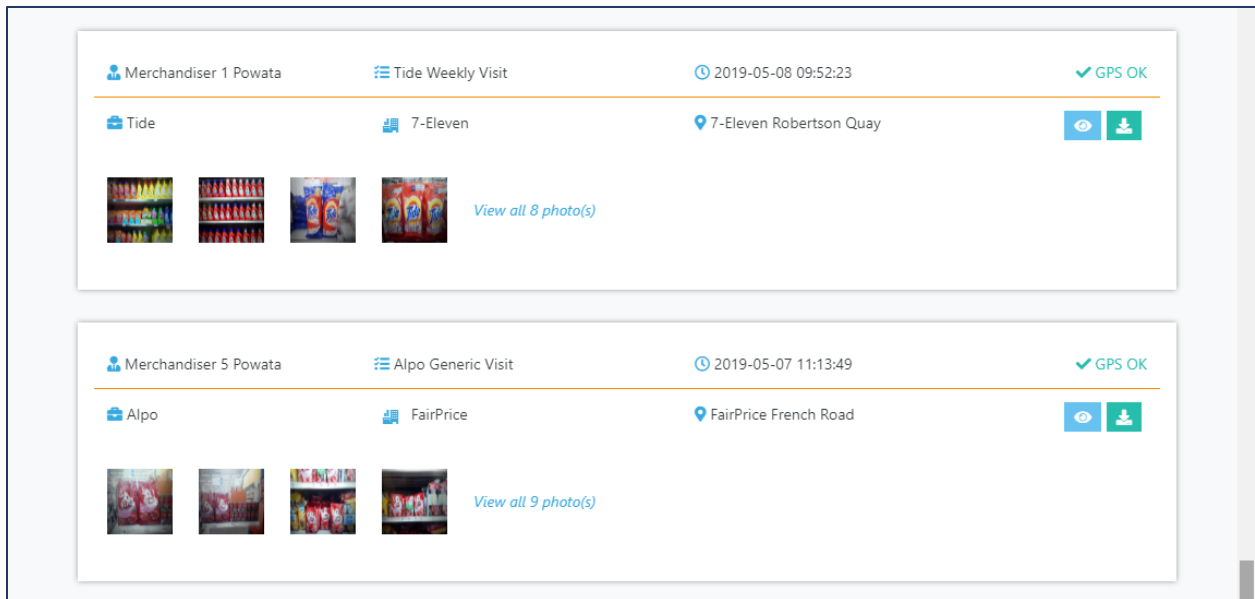
Also, the visit disappears from the dashboard once the data has been successfully synced.



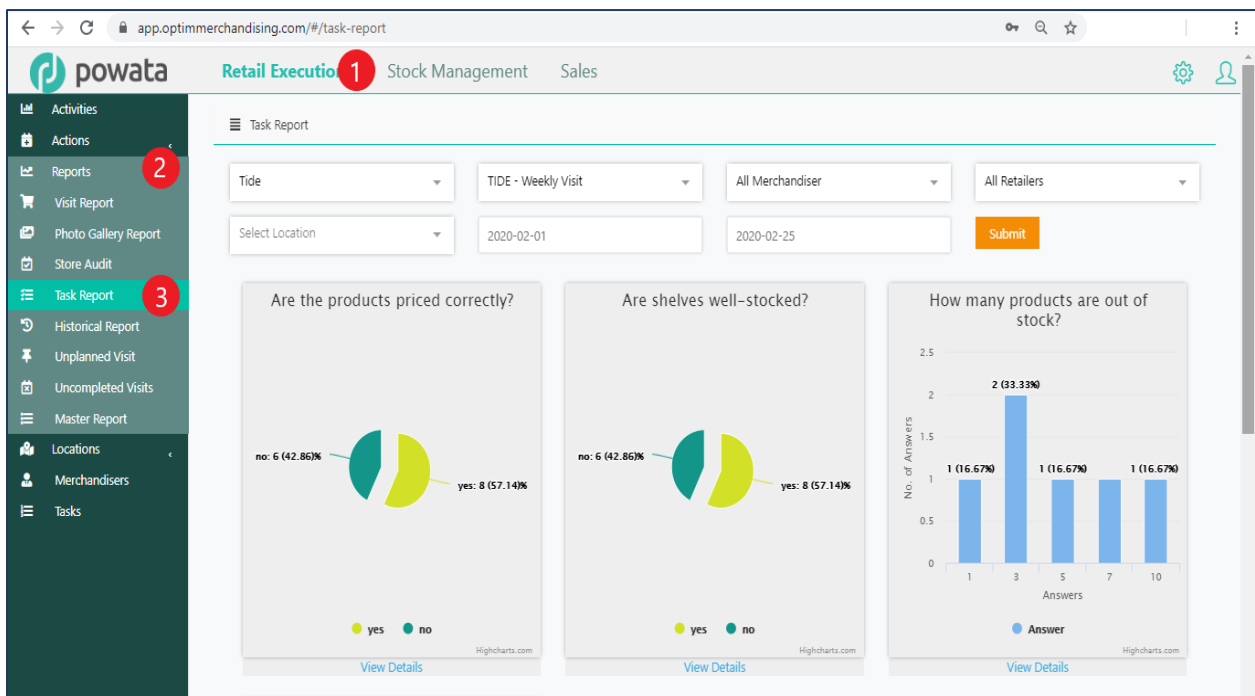
7. To view the reports, go to app.optimmerchandising.com and log-in with the manager credentials.

8. On the dashboard (**Activities tab**), you'll see a host of information such as a map showing the last location visited, chart for planned vs completed visits and snippet of reports from the latest visits done by your Merchandisers. Click the View button to see the full report while the download button provides you with a copy of the report in PDF format. There is also a filter to see only particular clients, merchandisers, department, among others.

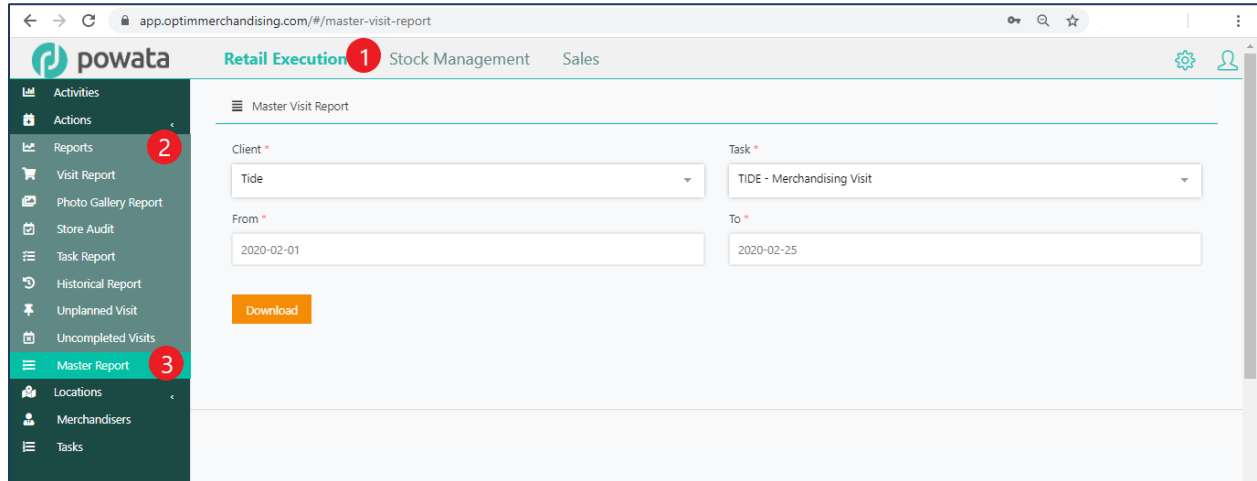
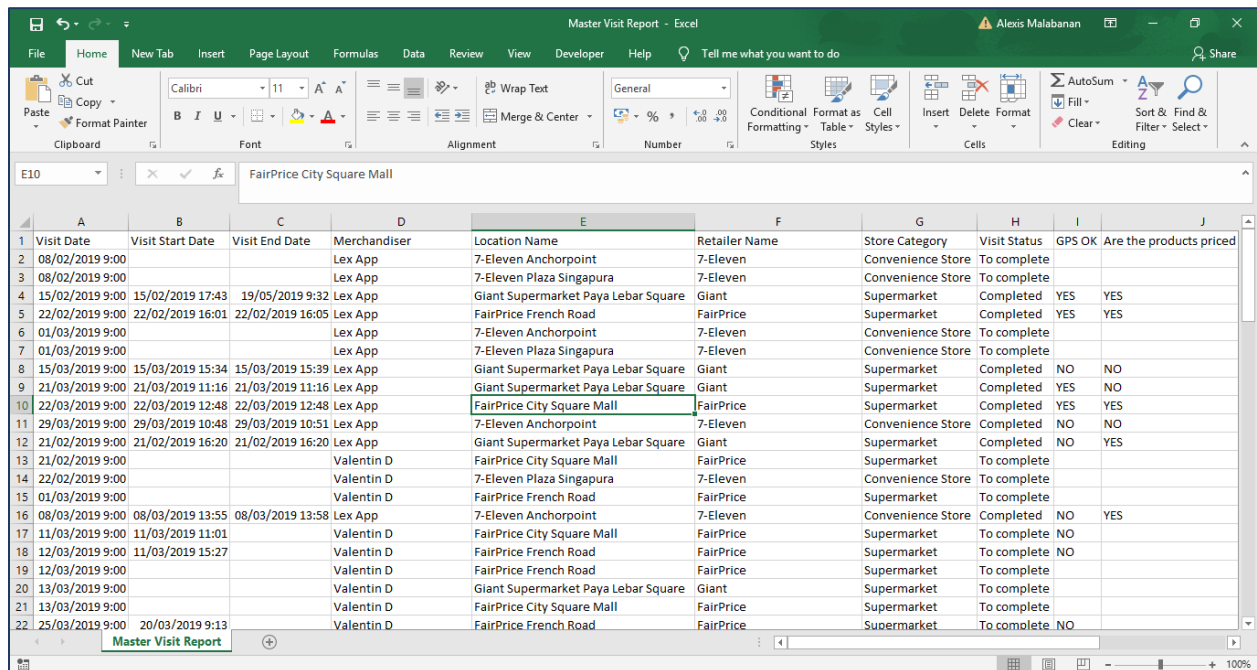




Task Report. Go to Retail Execution > Reports > Task Report. A graphical representation of task item results, answers to tick or yes/no questions are displayed as pie charts, number questions as column charts while selection questions are shown as bar charts. Also, you can see the location breakdown for each chart when you click the View Details.



Master Report. Go to Retail Execution > Reports > Master Report. This report enables you to download all the visit reports (except photos) plus the scheduled and uncompleted visits in CSV file.

Visit Date	Visit Start Date	Visit End Date	Merchandiser	Location Name	Retailer Name	Store Category	Visit Status	GPS OK	Are the products priced
08/02/2019 9:00			Lex App	7-Eleven Anchorpoint	7-Eleven	Convenience Store	To complete		
08/02/2019 9:00			Lex App	7-Eleven Plaza Singapura	7-Eleven	Convenience Store	To complete		
15/02/2019 9:00	15/02/2019 17:43	19/05/2019 9:32	Lex App	Giant Supermarket Paya Lebar Square	Giant	Supermarket	Completed	YES	YES
22/02/2019 9:00	22/02/2019 16:01	22/02/2019 16:05	Lex App	FairPrice French Road	FairPrice	Supermarket	Completed	YES	YES
01/03/2019 9:00			Lex App	7-Eleven Anchorpoint	7-Eleven	Convenience Store	To complete		
01/03/2019 9:00			Lex App	7-Eleven Plaza Singapura	7-Eleven	Convenience Store	To complete		
15/03/2019 9:00	15/03/2019 15:34	15/03/2019 15:39	Lex App	Giant Supermarket Paya Lebar Square	Giant	Supermarket	Completed	NO	NO
21/03/2019 9:00	21/03/2019 11:16	21/03/2019 11:16	Lex App	Giant Supermarket Paya Lebar Square	Giant	Supermarket	Completed	YES	NO
22/03/2019 9:00	22/03/2019 12:48	22/03/2019 12:48	Lex App	FairPrice City Square Mall	FairPrice	Supermarket	Completed	YES	YES
29/03/2019 9:00	29/03/2019 10:48	29/03/2019 10:51	Lex App	7-Eleven Anchorpoint	7-Eleven	Convenience Store	Completed	NO	NO
21/02/2019 9:00	21/02/2019 16:20	21/02/2019 16:20	Lex App	Giant Supermarket Paya Lebar Square	Giant	Supermarket	Completed	NO	YES
21/02/2019 9:00			Valentin D	FairPrice City Square Mall	FairPrice	Supermarket	To complete		
22/02/2019 9:00			Valentin D	7-Eleven Plaza Singapura	7-Eleven	Convenience Store	To complete		
01/03/2019 9:00			Valentin D	FairPrice French Road	FairPrice	Supermarket	To complete		
08/03/2019 9:00	08/03/2019 13:55	08/03/2019 13:58	Lex App	7-Eleven Anchorpoint	7-Eleven	Convenience Store	Completed	NO	YES
11/03/2019 9:00	11/03/2019 11:01		Valentin D	FairPrice City Square Mall	FairPrice	Supermarket	To complete	NO	
12/03/2019 9:00	11/03/2019 15:27		Valentin D	FairPrice French Road	FairPrice	Supermarket	To complete	NO	
12/03/2019 9:00			Valentin D	FairPrice French Road	FairPrice	Supermarket	To complete		
13/03/2019 9:00			Valentin D	Giant Supermarket Paya Lebar Square	Giant	Supermarket	To complete		
13/03/2019 9:00			Valentin D	FairPrice City Square Mall	FairPrice	Supermarket	To complete		
25/03/2019 9:00	20/03/2019 9:13		Valentin D	FairPrice French Road	FairPrice	Supermarket	To complete	NO	

9. Mobile Application Troubleshooting

	Error	Cause	Solution
1	Unable to log-in	Wrong username or password	Check and make sure the credentials you enter are correct.
		No internet connection	Connect to a Wi-Fi signal or data connection. Ensure your mobile is not in airplane mode.
2	Merchandiser can't make visits or add locations on the app	Permission is disabled on the platform	Ask your Manager to enable the permission.
		Merchandiser is not assigned to client	Assign Merchandiser to Client (Settings > Location Settings > Client / Edit / Add Merchandiser)
3	No visit schedule can be found	No visit was scheduled on the platform	Create a visit directly on the app.
		Visit is assigned to another Merchandiser	Check with Manager to whom the visit was assigned.
4	Unable to perform tasks	Primary Start Task button is not yet activated	Tap the Start Task button at the top of the screen.
5	No products appear in stock take or planogram task	Merchandiser is not assigned to the client	Assign Merchandiser to the client on the platform. Go to Settings/Location Settings/Client > Edit > Add Merchandiser
6	Additional Information		<ul style="list-style-type: none"> - When installing the app on your phone, make sure to allow all permissions requested by the app. - The location permission should be turned on in your phone settings for geotagging to work properly. - For Android mobile phones, the minimum OS version supported is Android 4.1. - Make sure to have at least 50 mb available internal storage in your phone.

END OF TUTORIAL