

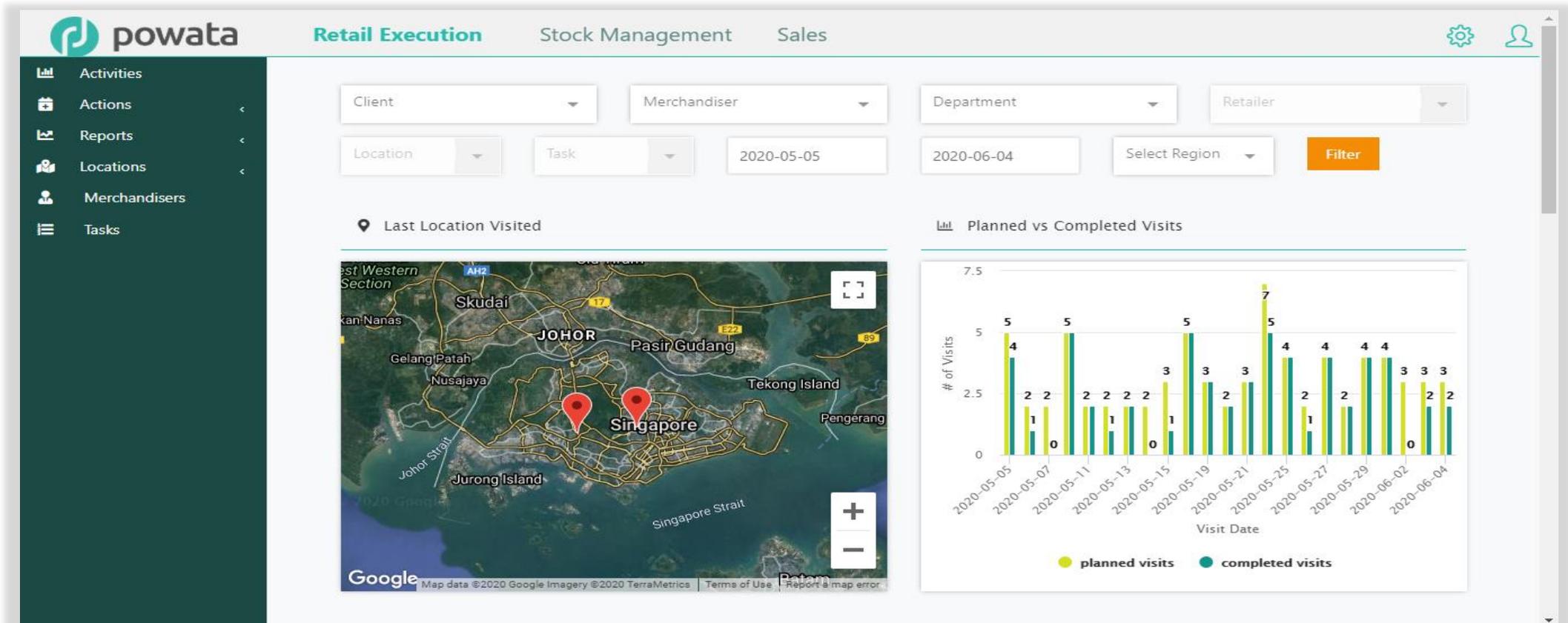


OptimMerchandising Retail Execution Module – Reports and Analysis

Dashboard (Activities tab) - contains a host of information allowing you to monitor and measure performance and metrics in real time.

Map – shows the last location visited by each merchandiser.

Chart – compares the visits scheduled for the day including those created on-the-go vs the visits completed within the same day. You can also use the filters located at the top of the page to view specific data based on selected parameters.





OptimMerchandising Retail Execution Module – Reports and Analysis

Reports overview – provides an overview of smart task reports from completed visits. Only reports from completed visits are shown in here where the most recent ones appear at the top. It contains information such as merchandiser, date and time started, GPS check, location, pictures taken during the visit, etc. It also has buttons to view the complete report and to download the report in PDF format.

For GPS check, a ✓ means the GPS coordinates when the task was performed is within the range of the location while an ✗ means the coordinates are outside the range. You can change the range in Settings > Company Settings.

Date and Time started ← 2020-06-03 11:22:58

GPS check ← ✓ GPS OK

Merchandiser 2 Powata DOVE - Merchandising Visit

Unilever Guardian Guardian Ang Mo Kio Blk 449

View button **PDF button**

[View all 10 photo\(s\)](#)



OptimMerchandising Retail Execution Module – Reports and Analysis

Reports – various reports are available in the Reports tab. Each one is discussed in this manual.

Visit Report – provides the status of all visits with at least 1 task completed and synced to the backend. The GPS OK tells if the visit was conducted within the range of the location while the GPS Start and End simply shows if GPS was retrieved when visit was started and ended. Reports can be downloaded in CSV file.

The screenshot shows the 'Generic Visit Report' interface. At the top right is an 'Export CSV' button. Below the title are three dropdown menus for 'Retailer', 'Merchandiser', and 'Location'. Below these are date pickers for 'From' (2020-05-05) and 'To' (2020-06-04), along with 'Clear Filter' and 'Filter' buttons. A search bar is on the left, and a 'Display 10 records' dropdown is on the right. The table below has columns: Date, Retailer, Location, Merchandiser, GPS Start, GPS End, GPS OK, and Actions.

Date	Retailer	Location	Merchandiser	GPS Start	GPS End	GPS OK	Actions
2020-06-04	Guardian	Guardian Beauty World MRT	Merchandiser 2 Powata	✓	✓	✗	
2020-06-04	Guardian	Guardian Bishan Junction 8	Merchandiser 1 Powata	✓	✓	✗	
2020-06-03	Guardian	Guardian Ang Mo Kio Blk 449	Merchandiser 2 Powata	✓	✓	✓	



OptimMerchandising Retail Execution Module – Reports and Analysis

Photo Gallery Report – a repository of all photos taken in smart tasks of a client. Images can be downloaded individually or in bulk.

2020-05-04

[Download](#)

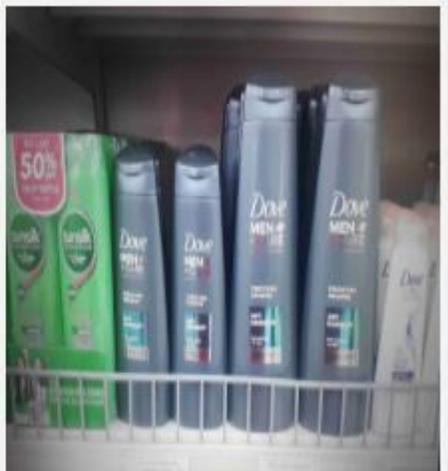


Guardian 313@Somerset - 2020-05-04

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2020-05-04

[Download](#)



Guardian 313@Somerset - 2020-05-04

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2020-05-04

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Guardian 313@Somerset - 2020-05-04

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[Download Selected Photo](#)

1 2 Next Last



OptimMerchandising Retail Execution Module – Reports and Analysis

Store Audit Report – downloads the complete reports of a selected smart task in CSV file. Photos, however, cannot be downloaded in CSV format.

☰ Store Audit Report

Client *
Unilever ▼

Task *
DOVE - Weekly Visit ▼

From *
2020-05-06

To *
2020-06-05

Download

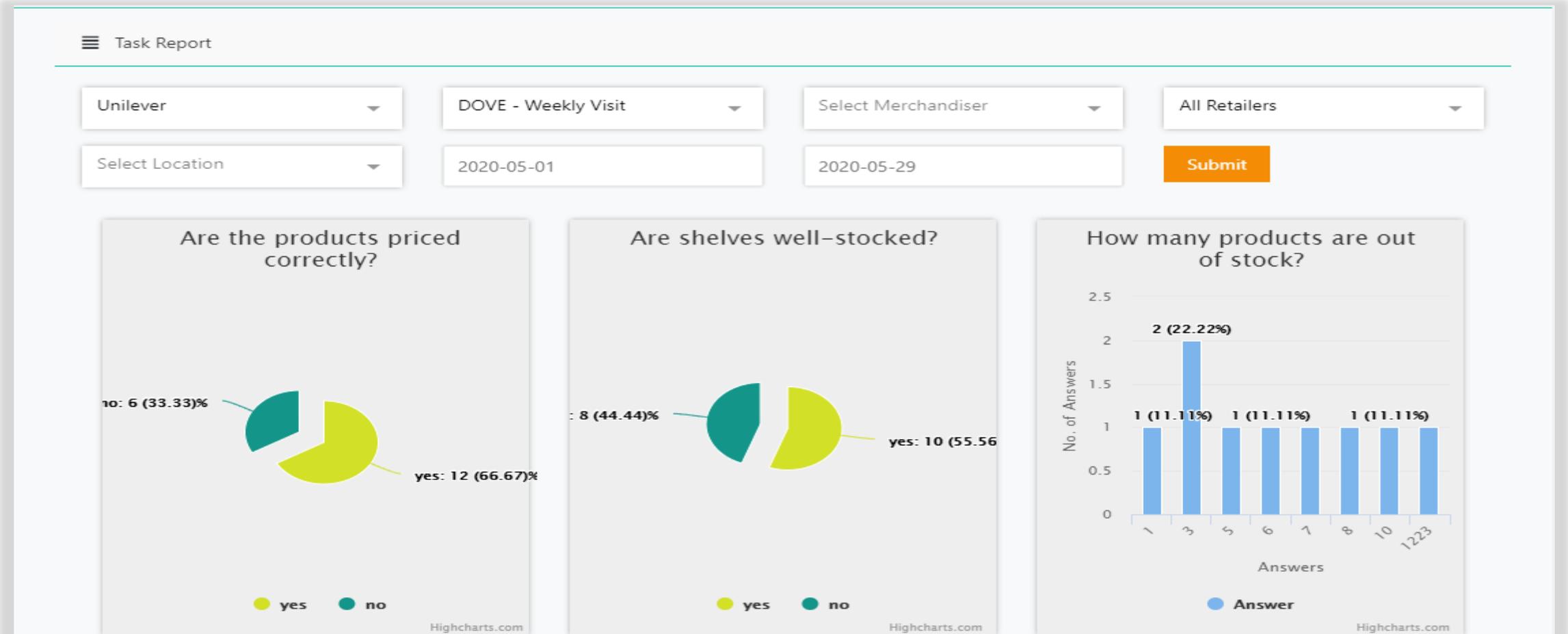
Calendar for Jun 2020:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13



OptimMerchandising Retail Execution Module – Reports and Analysis

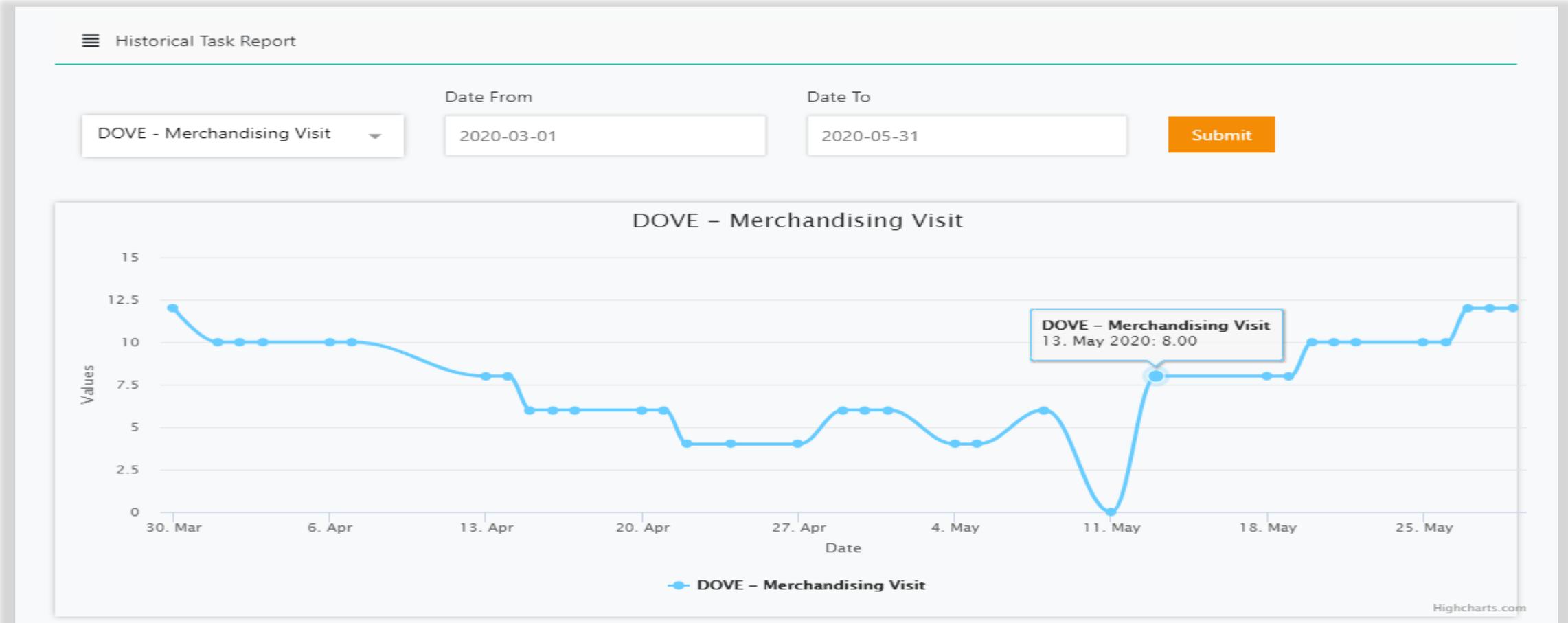
Task Report - a graphical representation of task item results in a smart task, answers to tick (yes / no questions) are aggregately displayed in pie charts, number questions in vertical bar charts, and selection questions are shown in horizontal bar charts. Also, you can see the location breakdown of each chart when you click on the View Details.





OptimMerchandising Retail Execution Module – Reports and Analysis

Historical Report - a compilation of scores generated from a smart task and presented in a line graph. Tasks can be scored when you use the selection answer type and assign numerical values under the weights column.





OptimMerchandising Retail Execution Module – Reports and Analysis

Unplanned Visits – provides a lists of all locations that have no scheduled visits within the selected time frame. Reports can be downloaded in CSV file.

☰ Locations Visit Report Export CSV

From * To * Filter

No Visit Locations

Name ▼	Retailer	Clients
Watsons Aljunied Ave 2	Watsons	Dove , Pringles , Powata , Unilever
7-Eleven Anchorpoint	7-Eleven	Dove , Purina Pet Care , Alpo , Tide , Royco , Unilever
7-Eleven Plaza Singapura	7-Eleven	Dove , Alpo , Tide , Pringles , Royco , Unilever



OptimMerchandising Retail Execution Module – Reports and Analysis

Uncompleted Visits – provides a lists of all visits that were started but not completed within the schedule. To see the visit details, click on the View button. Reports can be downloaded in CSV file.

☰ Uncompleted Store Visits [Export CSV](#)

Merchandiser Retailer Client Location

From * To * [Clear Filter](#) [Filter](#)

Display records

ID	Retailer	Location	Planned Visit Date	Merchandiser	Actions
77380	Guardian	Guardian 313@Somerset	2020-06-04 09:00:00	Merchandiser 1 Powata	View
77332	Giant	Giant Supermarket Paya Lebar Square	2020-06-03 09:00:00	Merchandiser 3 Powata	View
77308	Guardian	Guardian 313@Somerset	2020-06-02 09:00:00	Merchandiser 1 Powata	View



OptimMerchandising Retail Execution Module – Reports and Analysis

Master Report – similar to store audit, it downloads the complete reports of a selected smart task but also includes details from overdue and to be completed visits.

☰ Master Visit Report

Client *
Unilever

Task *
DOVE - Weekly Visit

From *
2020-01-01

To *
2020-06-05

Download

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				