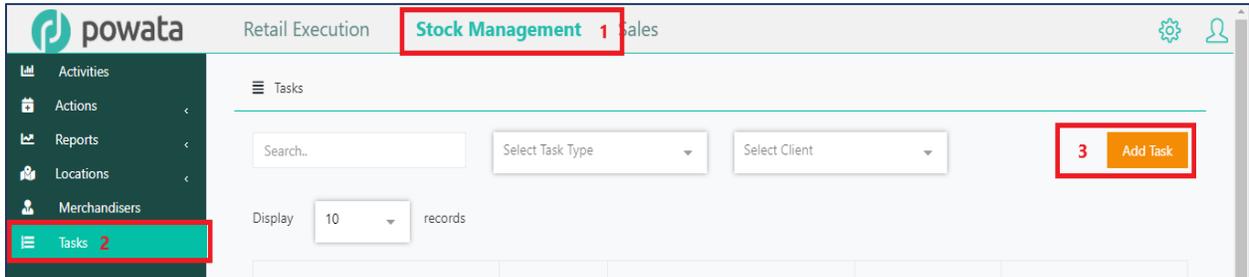


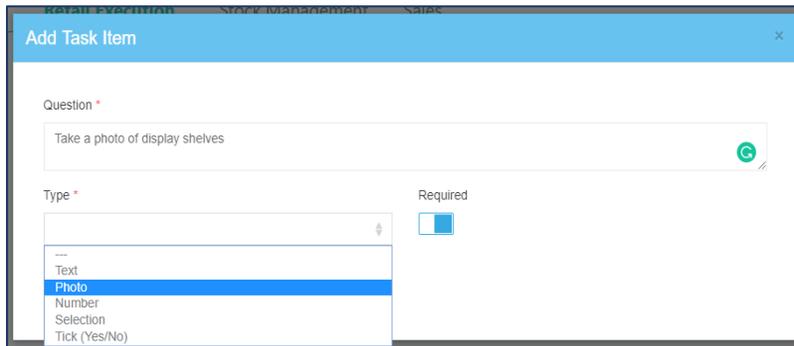
1. Go to app.optimmerchandising.com and log-in with the manager credentials.

2. **Create tasks.** Go to Stock Management > Tasks > Add Task. This is where you create the task items that your Merchandisers will need to perform in their visits.

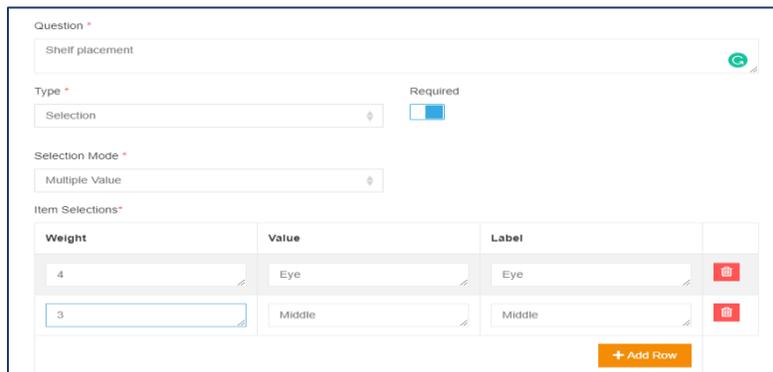


Fill-out the required fields and select the right task type for your visit. There are 3 task types to choose from: smart task, planogram check, and stock take.

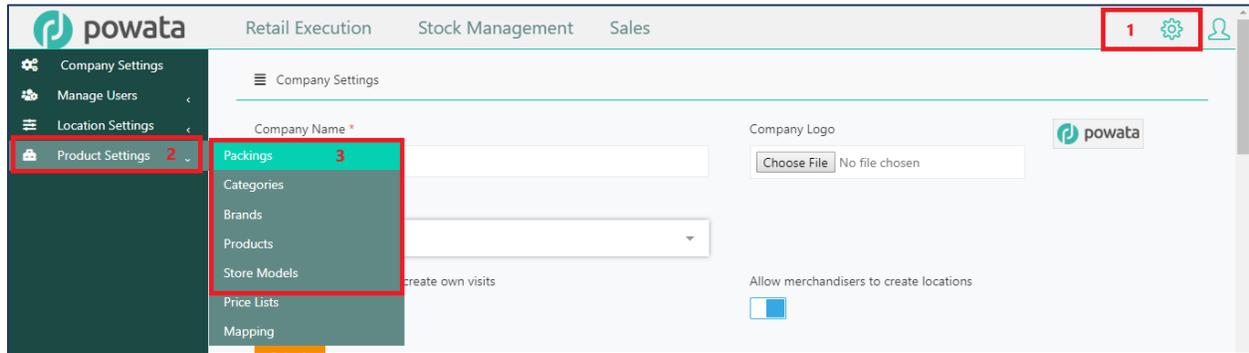
Then, add task items. Write your question on the box and select the question type according to the desired response (text, photo, number, selection, tick (yes/no)). You can set each question as required or not.



For selection question type (choose from single or multiple values), you can assign numerical values in weights to grade a task item. The weights are then summed up and shown as a score in reports.



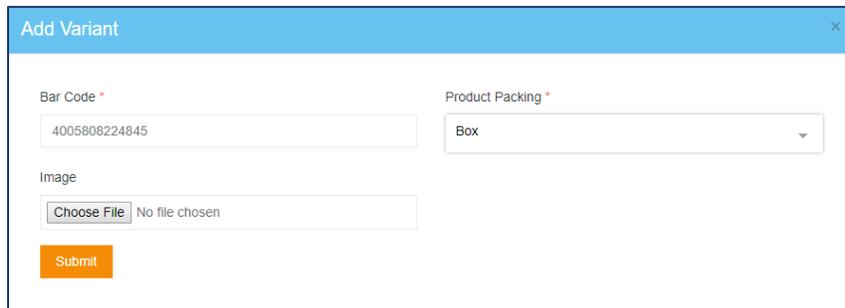
3. Product Settings. In configuring your product settings, it is important that you follow the steps in order as some of the fields at the beginning are needed to be in place in the next steps ahead.



Go to Settings > Product Settings > Packings > Add Product Packing (Each, Bottle, Sachet, Bag...)
 > Categories > Add Product Category (Hair Care, Makeup...)
 > Brands > Add Product Brand (Revlon, Clinique, L'Oreal...)
 > Products > Add Product (Dove Men Anti Dandruff 340 ml...)
 > Store Models > Add Store Model

Product Barcode

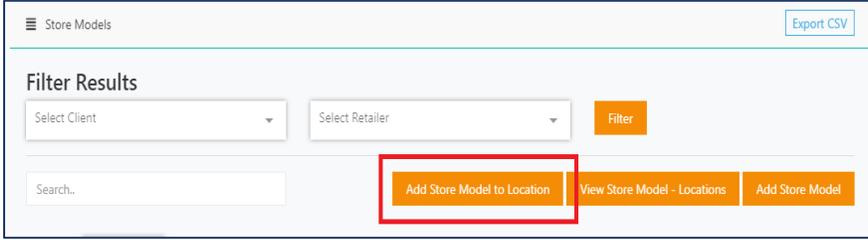
When you add your products, don't forget to click on the Add New Variant button where you will be asked to input the product barcode. Each barcode should be unique and must be a continuous number (ex. 8400345234513)



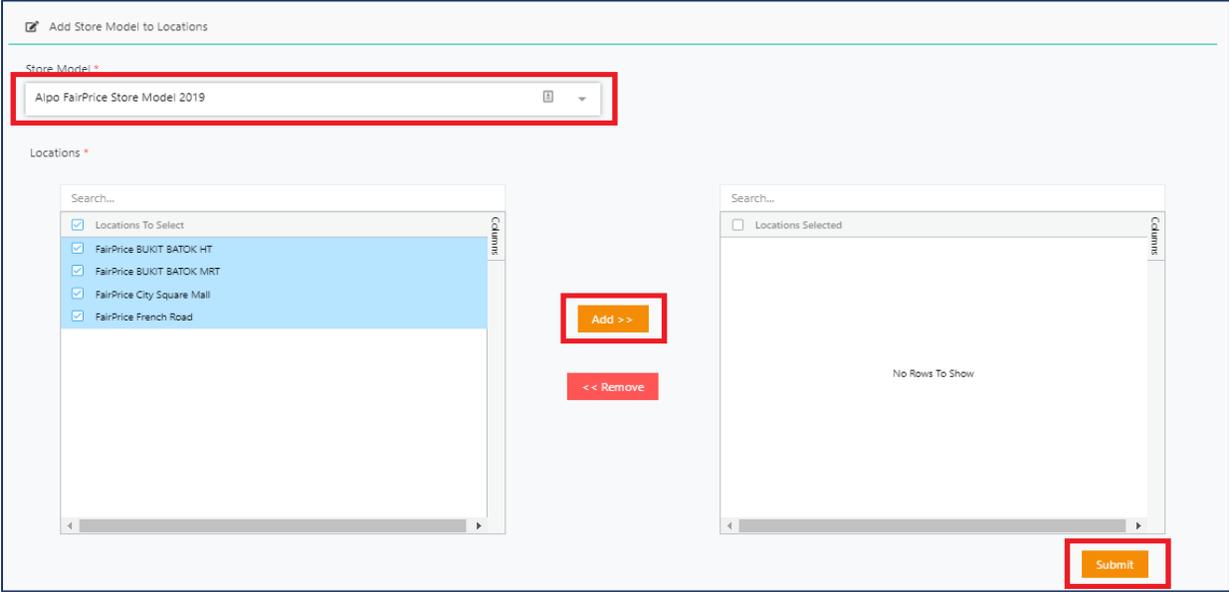
Add Store Model to Location

Once you've created a store model on the platform, you must add it to a location.

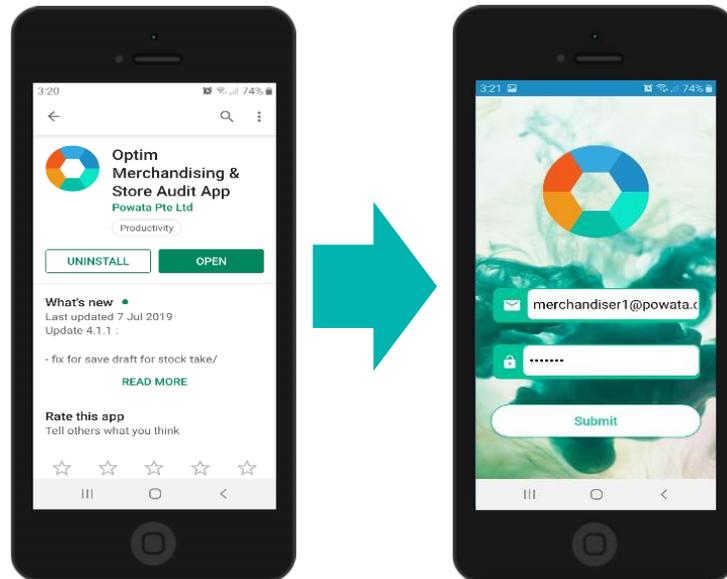
Go to Store Models > Add Store Model to Location



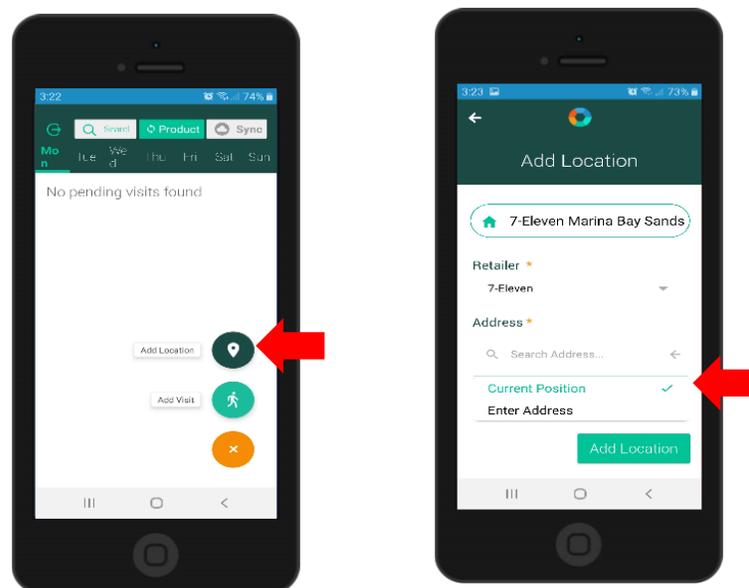
Select from the list of store models and on the left column tick the boxes before the locations that you wish to add them to. Click on Add and tick the boxes again on the right column before clicking on the Submit button.



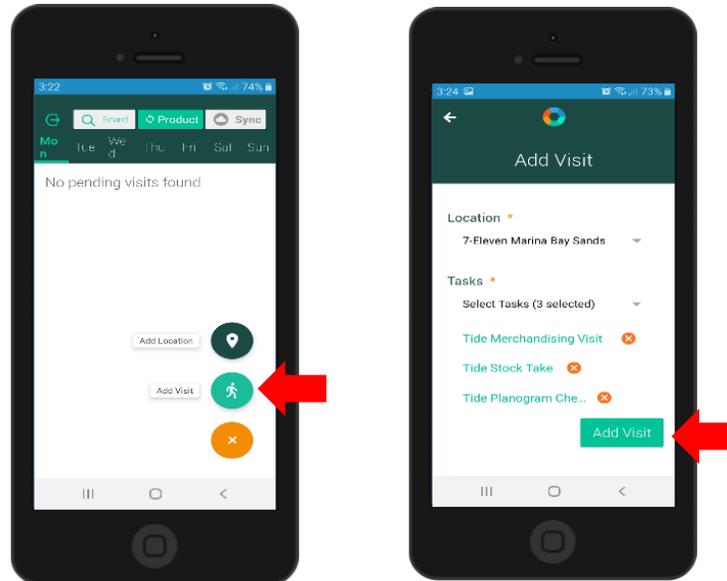
4. Download OptimMerchandising & Store Audit App from [Google Play](#) or [App Store](#) on your device. Log-in with the Merchandiser credentials.



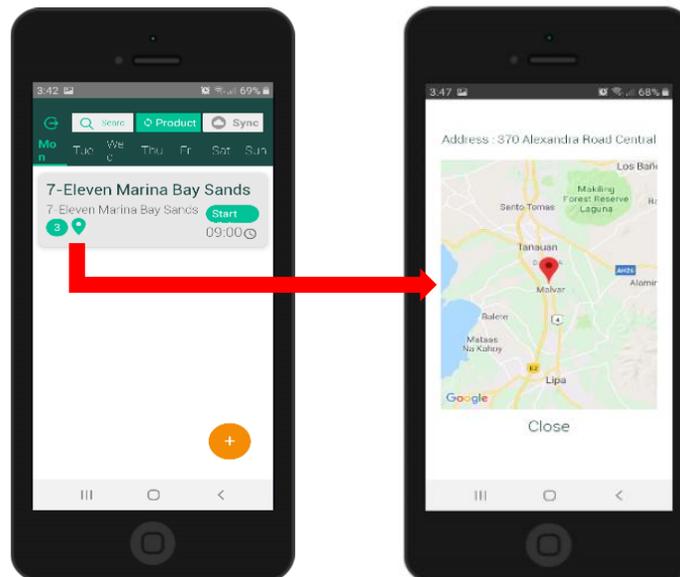
5. Location on the go. Create a new location by clicking on the + button and select Add Location. Write the location name and select the default retailer “My First Retailer” as your retailer. You may add other retailers on the platform later on. For the address, you may choose “Current Position” which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



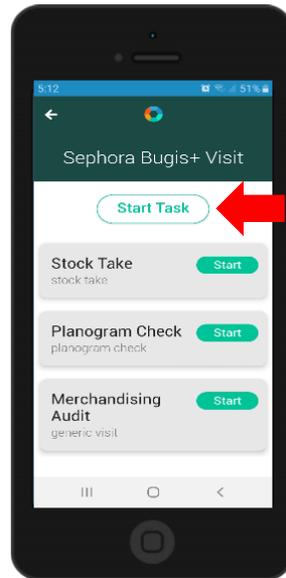
6. Visit on the go. Create a new visit directly on the app. Click on the + button and select Add Visit. Choose the location and tasks. Choose as many tasks as needed. Then click on Add Visit.



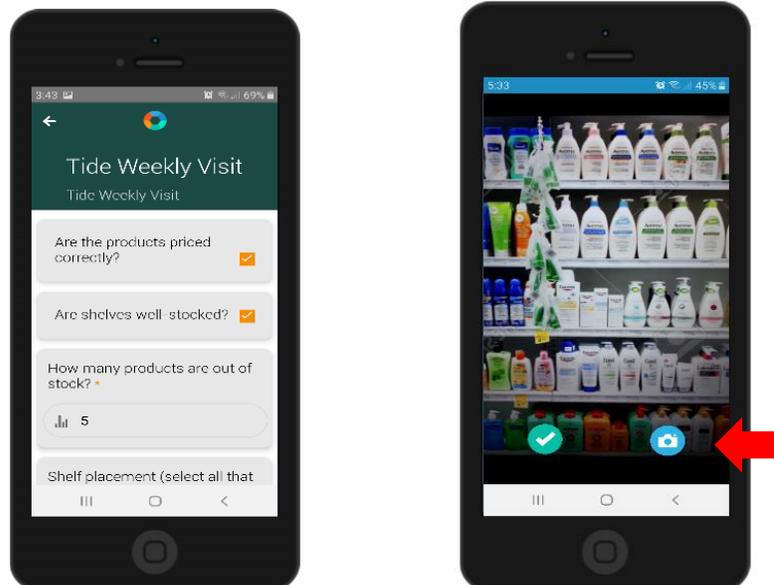
You'll be redirected to the weekly dashboard where you'll see the visit that you've just created. If you click on the map icon, it will display the map of the visit location.



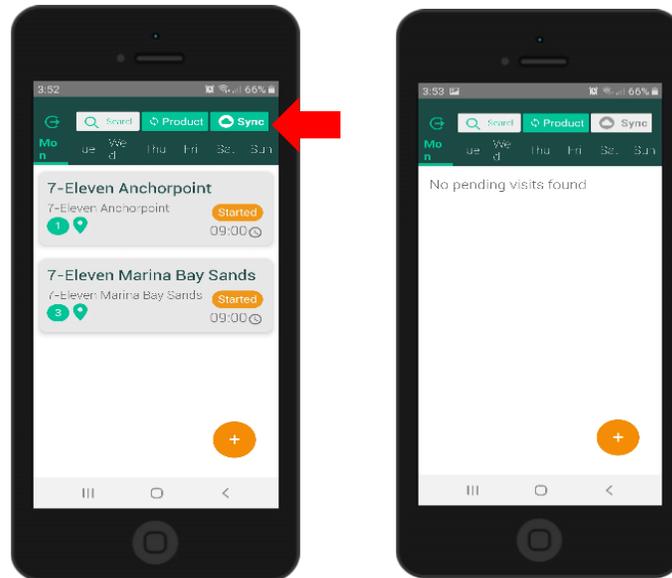
7. Conduct the visit. To begin the visit, click on the big green Start Task button. This shall also register as the start time of your visit and retrieves the GPS coordinates of your actual location. You won't be able to work on any tasks without first pressing this button. Thereafter, click on the smaller Start Task button 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.

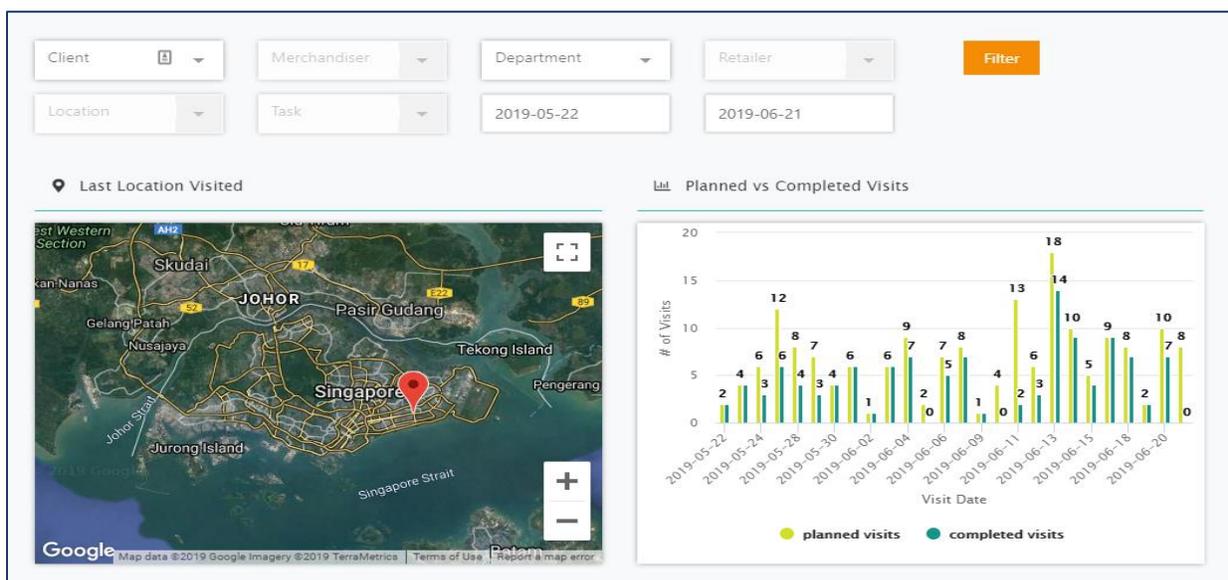


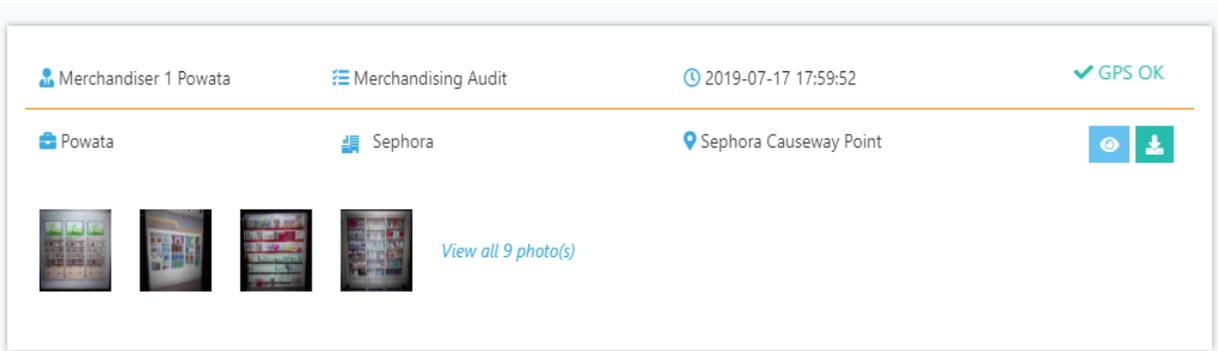
When you finished a task, you'll see that the Sync button turns green in color which indicates that there are data waiting to be synced. Once the sync finishes, the button will revert to color gray.



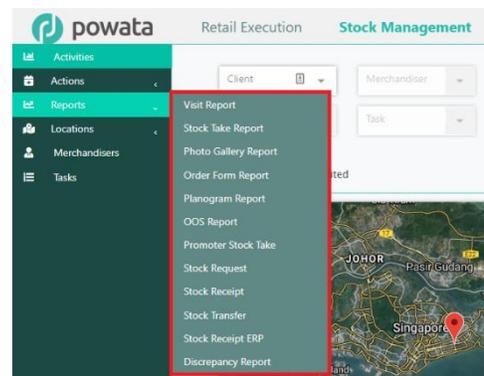
8. Go back to the platform and log-in with the manager credentials.

9. Dashboard and Reports. 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 snapshot of planogram and stock take reports from the latest visits done by your Merchandisers. You can see the full report when you click on the View button and download each report as a PDF file. There is also a filter to show data based on the selected parameters.





Once the data from the field are synchronized with the backend, various reports become available on the platform. Here are some of those reports:



1. Visit Report – provides a full report of each completed smart task; contains visit details such as time started/ended, GPS coordinates, answers to task items and photos taken during the visit.

2. Stock Take Report – provides not only an inventory of products on hand but also the quantity to order / excess by comparing the stock count against the assigned store model to the location. An order form for products due for replenishment is available and can be downloaded in PDF and CSV file.

Stock Take Item Report						
Visit Name	Sephora Bugis+ Visit					
Location	Sephora Bugis+ 201 Victoria Street #02-06/07/08/09 Singapore 188067, 188067					
Start Time	2019-07-17 17:37 PM	End Time	2019-07-17 17:38 PM			
Start GPS Coordinate	14.043202 , 121.1578341	End GPS Coordinate	14.043202 , 121.1578341			
Day of visit	2019-07-17	Merchandiser	Merchandiser 1 Powata			
Product	Quantity Store Model	Quantity in Stock	Quantity to Order	Quantity in Excess	Total Score	No. of damaged items (for pull-out)
NATURVITAL HAIR LOSS SHAMPOO-NORMAL HAIR SACHET 10ML	300	96	204	0	-	0
NATURVITAL HAIR LOSS SHAMPOO-DRY HAIR SACHET 10ML	300	209	91	0	-	1
NATURVITAL HAIR LOSS SHAMPOO-GREASY HAIR SACHET 10ML	300	271	29	0	-	0

example of stock take report



Powata

SG

12345678

Product	Category	Brand	IRC Code	Barcode	Mapping Codes	Product Packing	Quantity to Order
NATURVITAL HAIR LOSS SHAMPOO-NORMAL HAIR SACHET 10ML	Shampoo	NATURVITAL	NA7001SS	8414002079002		Sachet	204
NATURVITAL HAIR LOSS SHAMPOO-DRY HAIR SACHET 10ML	Shampoo	NATURVITAL	NA7002SS	8414002079019		Sachet	91
NATURVITAL HAIR LOSS SHAMPOO-GREASY HAIR SACHET 10ML	Shampoo	NATURVITAL	NA7003SS	8414002079026		Sachet	29
TOPICREM LIGHT ULTRA-MOISTURIZING CREAM 40 ML	Facial Cream	TOPICREM	TO1701	3700281703313		Tube	115
TOPICREM LIGHT SOOTHING CREAM 40 ML	Facial Cream	TOPICREM	TO1702	3700281702521		Tube	254
TOPICREM GENTLE CLEANSING GEL 200 ML	Facial Cleanser	TOPICREM	TO1704	3700281702408		Bottle	67
TOPICREM ULTRA-MOISTURIZING BODY MILK 75 ML	Body Milk	TOPICREM	TO1711	3700281703245		Bottle	136
TOPICREM ULTRA-MOISTURIZING BODY MILK 500 ML DUO	Body Milk	TOPICREM	TOPI1713	3700281702293		Bottle	103

example of order form

3. Photo Gallery Report – repository of all photos taken during planogram check and stock take.
4. Order Form Report – a summary of products due for replenishment based on the stock take reports.

10. 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 on the app	Permission is disabled on the platform	Ask your Manager to enable the permission.
		Merchandiser was 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 on the Start Task button at the top of the screen.
5	No products appear in stock take or planogram task	Merchandiser hasn't been 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. - Make sure to have at least 50 mb available internal storage on your phone. - For Android mobile phones, the minimum OS version supported is Android 4.1.

END OF TUTORIAL