



















OptimMerchandising – Stock Take PDF Report

1. Set the grouping of fields in the task.
 - a) Go to Stock Management or Retail Execution module > Tasks > edit task.

The screenshot shows the Powata application interface. The top navigation bar includes the Powata logo, the current module 'Stock Management', and other modules 'Retail Execution' and 'Sales'. A left sidebar contains a menu with items like 'Activities', 'Actions', 'Reports', 'Stock', 'Stock Discrepancy Report', 'Locations', 'Merchandisers', 'Tasks', and 'Sales'. The 'Tasks' menu item is highlighted. The main content area shows a 'Tasks' section with a search bar, a dropdown menu set to 'Stock Take', and another dropdown menu set to 'Select Client'. There is an 'Add Task' button. Below this is a 'Display 10 records' control. A table lists several stock take tasks:


Name	Client	Description	Type	Actions
PRINGLES - Stock Take	Pringles		stock take	   
DR. MARTENS - Stock Take	Dr. Martens		stock take	   
DOVE - Stock Take	Unilever		stock take	   
TIDE - Stock Take	Tide		stock take	   

A red arrow points to the edit icon (pencil) in the 'Actions' column for the 'DOVE - Stock Take' task.



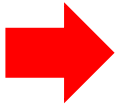
Optim Merchandising – Stock Take PDF Report

b) Click Continue.



Confirm Edit !

NOTE: Modifying the questions in a Smart Task may make existing reports irrelevant and/or no more accessible from the dashboard. If you need to delete questions, we recommend you create a new Smart Task.



No. of damaged items (for pull-out) NO YES



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c) In the task item portion, click edit the first task item.

Edit Task

Name *

Task Type *

Client *

Description

Type	Question	Required	Display in PDF	PDF Group	Actions
text	text	No	No	0	
photo	photo	No	No	0	
number	number	No	No	0	
selection	single selection	No	No	0	
tick	tick	No	No	0	



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d) In Edit Task Item window, turn on the toggle under Display in PDF if you want this item to be displayed in the PDF report. Otherwise, it would not be shown in the PDF but the task item would still be displayed in the view report.

The screenshot shows the 'Edit Task Item' window with the following fields and controls:

- Question ***: A text input field containing the word 'text'.
- Type ***: A dropdown menu currently set to 'Text'.
- Required**: An unchecked checkbox.
- Display in PDF**: A checked (blue) toggle switch. A red arrow points from the 'Required' checkbox to this toggle.
- PDF Group**: A dropdown menu currently set to '0'.
- Submit**: An orange button at the bottom left.



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e) Then, in the PDF Group drop-down list, select a number denoting the group or column the task item will be placed in. You can have up to 6 groups in the report. You may put several task items in a group. Further, you can rearrange the order the task items would appear in the report. For example, the 1st task item can be put in the last group (Group 6). However, the view report would still display the task items according to the order in the task.

The screenshot shows the 'Edit Task Item' form with the following fields and options:

- Question ***: A text input field containing 'text'.
- Type ***: A dropdown menu showing 'Text'.
- Required**: An unchecked checkbox.
- Display in PDF**: A checked checkbox.
- PDF Group**: A dropdown menu with 'PDF Group #' in the search bar. The list shows options 1 through 6, with '1' highlighted in green. A red arrow points to the '1' option.

Below the form, a table is partially visible with columns for 'No' and '0'.

No	0
No	0
No	0



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f) Click Submit to save the changes in the task item.

The screenshot shows a web interface for editing a task item. The form is titled "Edit Task Item" and includes the following fields and controls:

- Question ***: A text input field containing the word "text".
- Type ***: A dropdown menu currently set to "Text".
- Required**: A checkbox that is currently unchecked.
- Display in PDF**: A toggle switch that is currently turned on (blue).
- PDF Group**: A dropdown menu currently set to "1".
- Submit**: An orange button with the text "Submit". A large red arrow points to this button from the left.



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g) Repeat the same process to the other task items.


Edit Task

Name * ORET 1172 Task Type * Stock take

Client * Unilever

Description











Type	Question	Required	Display in PDF	PDF Group	Actions
text	text	No	No	0	 
photo	photo	No	No	0	 
number	number	No	No	0	 
selection	single selection	No	No	0	 
tick	tick	No	No	0	 








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h) Once done, click Submit at the bottom of the page to save the changes.

Type	Question	Required	Display in PDF	PDF Group	Actions
text	text	No	Yes	1	 
photo	photo	No	No	0	 
number	number	No	No	0	 
selection	single selection	No	No	0	 
tick	tick	No	No	0	 





OptimMerchandising – Stock Take PDF Report

2. Extract the PDF report.

a) Go to Stock Management > Reports > Stock Take Report > view report.

powata Retail Execution **Stock Management** Sales

Reports [Import CSV](#)

Merchandiser: [Dropdown] Retailer: [Dropdown] Location: [Dropdown] Client: [Dropdown] Department: [Dropdown]

From * 2022-12-21 To * 2023-01-20 [Clear Filter](#) [Filter](#)

Display 10 records

Date	Start Visit Time	End Visit Time	Retailer	Location	Client	Department	Merchandiser	GPS OK	Actions
Fri Jan 20 2023	10:47 AM	10:48 AM	Guardian	Guardian Admiralty Place	Unilever	Beauty and Personal Care	Merchandiser 1 Powata	YES	View Order Form
Fri Jan 20 2023	10:36 AM	10:48 AM	Guardian	Guardian 313@Somerset	Unilever	Beauty and Personal Care	Merchandiser 1 Powata	YES	View Order Form



OptimMerchandising – Stock Take PDF Report

Example of a view report

powata Retail Execution **Stock Management** Sales

Stock Take Item Report [Download PDF](#) [Export CSV](#)

Visit Name Guardian Admiralty Place

Location Guardian Admiralty Place # 01-39 , Blk 678A Woodlands Ave 6 Admiralty Place 731678 Singapore, Singapore 731678

Start Time 2023-01-20 17:10 PM **End Time** 2023-01-20 17:13 PM

Start GPS Coordinate 14.0431985 , 121.1578285 **End GPS Coordinate** 14.0431985 , 121.1578285

Day of visit 2023-01-20 **Merchandiser** Merchandiser 1 Powata

Product	Quantity Store Model	Quantity in Stock	Quantity to Order	Quantity in Excess	Expiry Date	Total Score	text	photo	number	single selection	tick	text II
Dove Men+Care Anti Dandruff Shampoo 340ml	50	34	16	0	2023-01-31	0	abc		34	yes	Yes	abc
Dove Men+Care Refreshing Clean Shampoo 340ml	40	17	23	0	2023-04-30	0	abc		17	no	Yes	abc
Dove Men+Care Strengthening Shampoo	50	25	25	0	2023-06-30	0	abc		25	yes	No	abc



OptimMerchandising – Stock Take PDF Report

b) In View report, click Download PDF to extract the PDF report.

The screenshot shows the Powata Stock Management interface. The top navigation bar includes 'Retail Execution', 'Stock Management', and 'Sales'. The left sidebar contains various report options, with 'Stock Take Report' highlighted. The main content area displays a 'Stock Take Item Report' for 'Guardian Admiralty Place'. A red arrow points to the 'Download PDF' button in the top right corner of the report area.

Stock Take Item Report

Visit Name: Guardian Admiralty Place

Location: Guardian Admiralty Place # 01-39 , Blk 678A Woodlands Ave 6 Admiralty Place 731678 Singapore, Singapore 731678

Start Time: 2023-01-20 17:10 PM **End Time:** 2023-01-20 17:13 PM

Start GPS Coordinate: 14.0431985 , 121.1578285 **End GPS Coordinate:** 14.0431985 , 121.1578285

Day of visit: 2023-01-20 **Merchandiser:** Merchandiser 1 Powata

Product	Quantity Store Model	Quantity in Stock	Quantity to Order	Quantity in Excess	Expiry Date	Total Score	text	photo	number	single selection	tick	text II
Dove Men+Care Anti Dandruff Shampoo 340ml	50	34	16	0	2023-01-31	0	abc		34	yes	Yes	abc
Dove Men+Care Refreshing Clean Shampoo 340ml	40	17	23	0	2023-04-30	0	abc		17	no	Yes	abc
Dove Men+Care Strengthening Shampoo	50	25	25	0	2023-06-30	0	abc		25	yes	No	abc



OptimMerchandising – Stock Take PDF Report

Example of a PDF report

Stock Take Report Details						
Visit Name	Guardian Admiralty Place					
Location	Guardian Admiralty Place # 01-39 , Blk 678A Woodlands Ave 6 Admiralty Place 731678 Singapore, Singapore 731678					
Start Time	17:10 PM	End Time	17:13 PM			
Start GPS Coordinate	14.0431985 , 121.1578285	End GPS Coordinate	14.0431985 , 121.1578285			
Day of Visit	2023-01-20	Merchandiser	Merchandiser 1 Powata			
Product / Barcode	Stock Level	Total Score	<ul style="list-style-type: none"> • text • single selection 	<ul style="list-style-type: none"> • tick • text II 	number	photo
Dove Men+Care Anti Dandruff Shampoo 340ml / 4800888190286	<ul style="list-style-type: none"> • Store Model: 50 • In Stock: 34 • To Order: 16 • In Excess: 0 	--	<ul style="list-style-type: none"> • text abc • single selection yes 	<ul style="list-style-type: none"> • tick Yes • text II abc 	34	
Dove Men+Care Refreshing Clean Shampoo 340ml / 4800888190287	<ul style="list-style-type: none"> • Store Model: 40 • In Stock: 17 • To Order: 23 • In Excess: 0 	--	<ul style="list-style-type: none"> • text abc • single selection no 	<ul style="list-style-type: none"> • tick Yes • text II abc 	17	
Dove Men+ Care Strengthening Shampoo 340ml / 4800888190307	<ul style="list-style-type: none"> • Store Model: 50 • In Stock: 25 • To Order: 25 • In Excess: 0 	--	<ul style="list-style-type: none"> • text abc • single selection yes 	<ul style="list-style-type: none"> • tick No • text II abc 	25	