OptimMerchandising Account Setup Guide

1. Log in to app.optimmerchandising.com with your manager credentials.
2. Change password. To change your password, go to your Profile > key in your new password > click Submit
3. Settings – this is where you set up your company settings, allow permissions, manage users and define their roles.

3.1   Settings > Company Settings
> Add Department
> Add Location Type
> Add Region
> Add Store Category

3.2   Settings > Permissions. Turn on the toggle for each of the various permissions available. Click Submit to save the changes. Only permissions enabled will be available on the mobile app.

> Allow merchandisers to create their visits
> Allow merchandisers to create locations
> Allow merchandisers to submit stock receipt
> Allow merchandisers to submit stock request
> Allow merchandisers to submit stock transfer
> Send email notifications for Sales (for Promoter app)

3.3   Settings > Manage Users > Users

Invite other users by typing in their email addresses. Users will receive an invite by email to confirm and set their password.
You may also add users directly. Click Add User > fill in the fields > assign roles by turning on the toggle for the role > click Submit. A user can have multiple roles.

3.4   Settings > Location Settings > Clients > Add Client

3.5   Settings > Location Settings > Clients > Assign merchandisers to the client
!!!! TO BE DONE for each new merchandiser added to the platform (otherwise the merchandiser won't see the locations and products on the mobile app)

3.6   Settings > Location Settings > Retailers > Add Retailer

Before you click Submit, you need to create location grades. Click Add New Location Grade (for ex. Grade A, Grade B, Grade C...) to classify the store locations of the retailer. You can add as many location grades as needed.

3.7   Settings > Location Settings > Retailers > Assign Retailer to Client

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

    4.1   Settings > Product Settings   > Packings > Add Product Packing
    4.2   > Categories > Add Product Category
    4.3   > Brands > Add Product Brand
    4.4   > Products > Add Product

5. Locations. Once you created the retailers, you can now add the store locations.

    5.1   Locations > Locations > Add Locations.

                  There are 3 ways to add locations:
                  a. manual or one by one on the platform
                  b. import CSV
                  c. location on-the-go

    5.2   Locations > Locations > Assign Client to Locations

    5.3   Settings > Location Settings > Planogram Pictures > Add Planogram
                  (optional)

    5.4   Settings > Location Settings > Planogram Pictures > Assign Planogram to Locations
                  (optional)

    5.5   Settings > Product Settings > Store Models > Add Store Model
                  (applicable to Stocks Management module users)

    5.6   Settings > Product Settings > Store Models > Add Store Model to Locations
                  (applicable to Stocks Management module users)

    5.7   Settings > Product Settings > Price Lists > Add List
                  (applicable to Sales module users)

    5.8   Settings > Product Settings > Price Lists > Assign a Price List to a Retailer
                  (applicable to Sales module users)

    5.9   Settings > Product Settings > Mapping > Add Mapping Code
                  (applicable to Stocks Management / Inventory module users)

6. Tasks. This is where you create the forms or questionnaires the merchandisers would perform during their visits.

        Tasks > Add Task

There are 3 task types available:

    a.   smart task – for generic types of questions
    b.   stock take – to be used when conducting a stock take
    c.   planogram check – to be used when conducting a planogram check

7. Visits. Once everything has been set up, you may now schedule the visits of the merchandisers.

There are 5 ways to create visits:

Actions > Visits

    a.   Add New Visit – visits are created one by one
    b.   Add Recurring Visit – applicable for visits that recur at regular intervals
    c.   Bulk Add Visit – allows the user to create multiple visits in a day
    d.   by import – visits are plotted in a template and imported into the platform
    e.   visit on the go – user create visits directly on the mobile app

8. Rosters. This is where you schedule the rosters of your promoters (applicable to Sales module users).

There are 3 ways to create rosters:

Sales module > Actions > Rosters

    a.   Assign New Shift – rosters are created one by one
    b.   Bulk Create Shift – allows the user to create multiple rosters over a period of time
    c.   By import – rosters are plotted in a template and imported into the platform

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