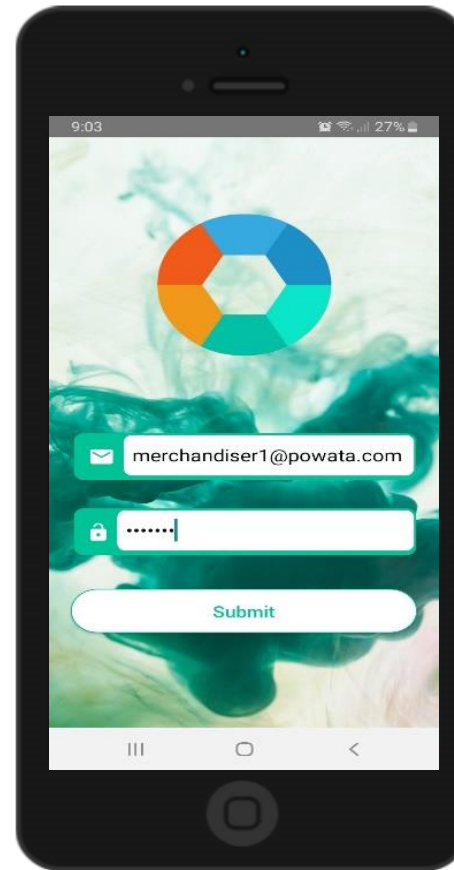
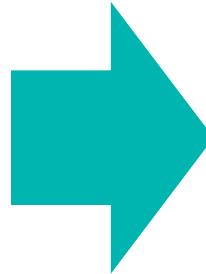
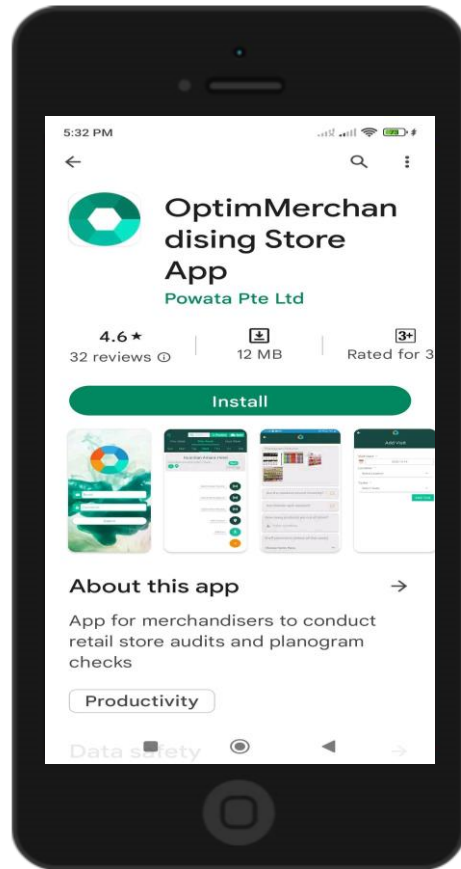




# OptimMerchandising – Mobile Application Tutorial (Retail Execution)

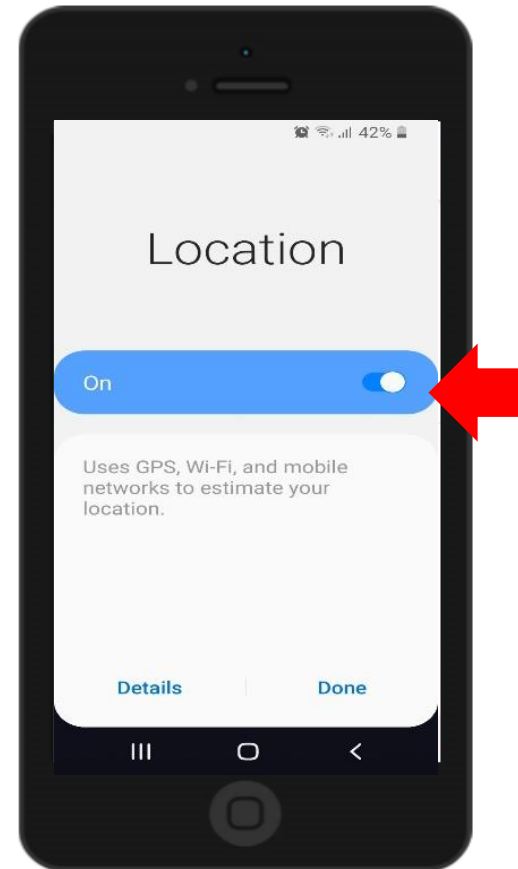
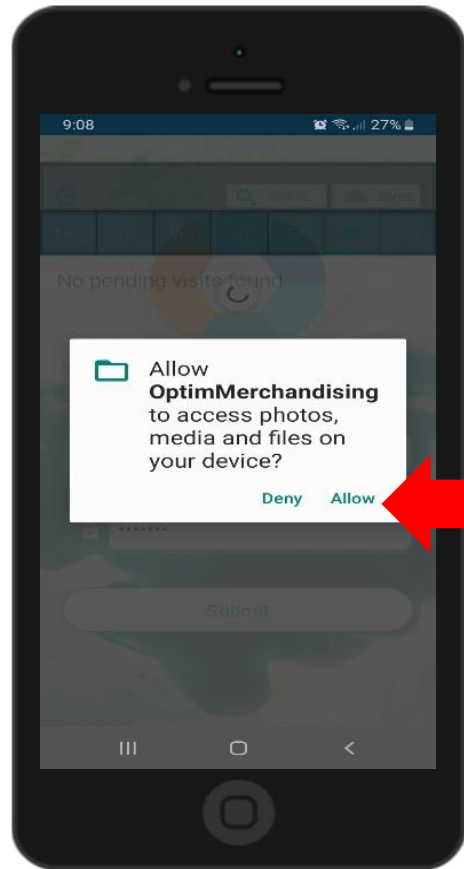
1. Download OptimMerchandising Store App from Google Play or App Store onto your device. Log in with the merchandiser credentials.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

Allow all permissions requested by the app including locations to enable geotagging.

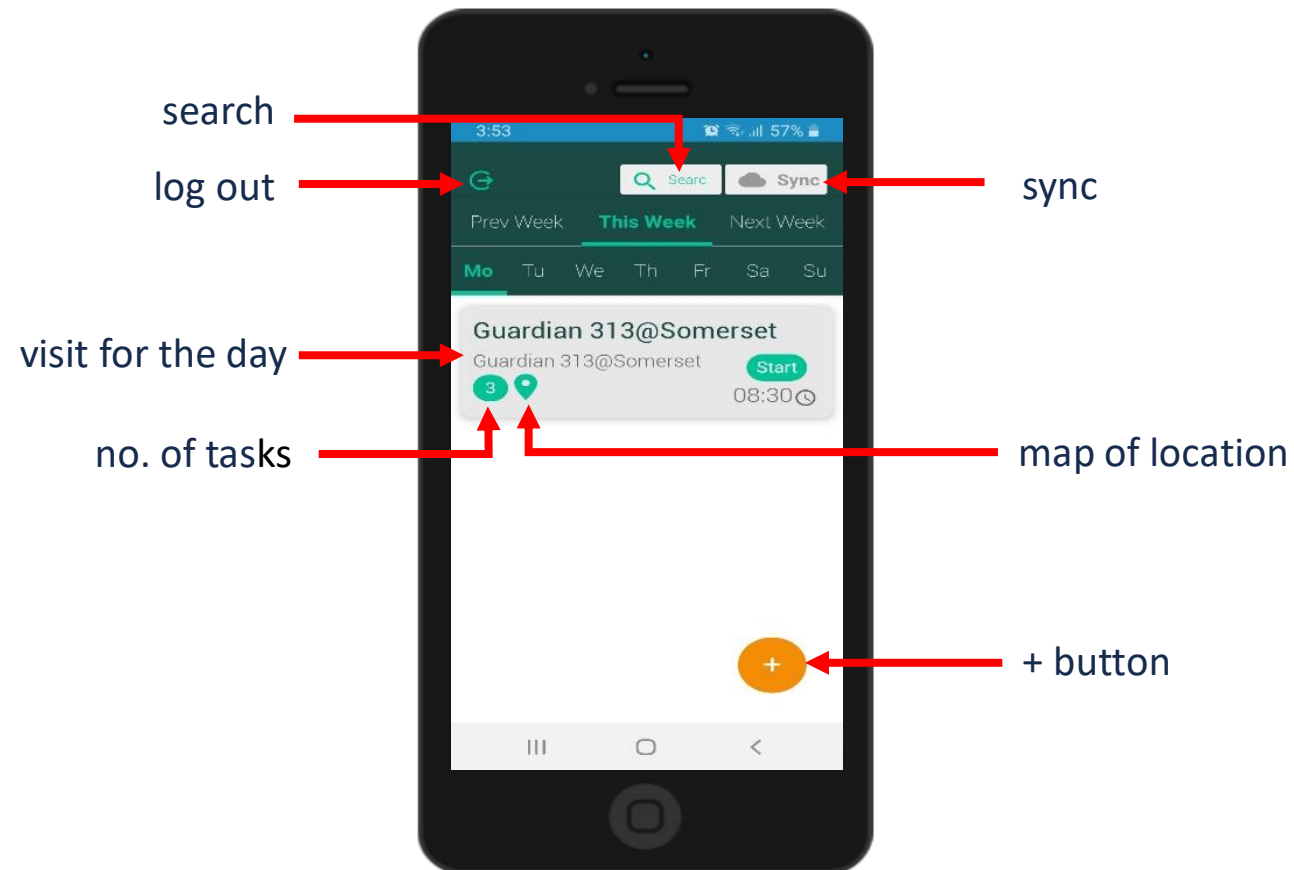




## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

Once logged in, the dashboard displays your schedule for the day including your schedule for the past, current, and upcoming week. You can perform any of the visits within these timeframes. Only visits assigned to you are displayed on the screen.

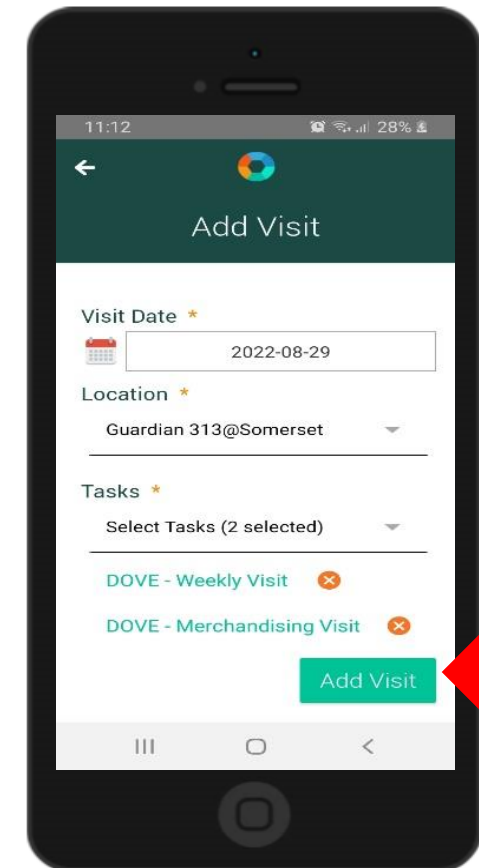
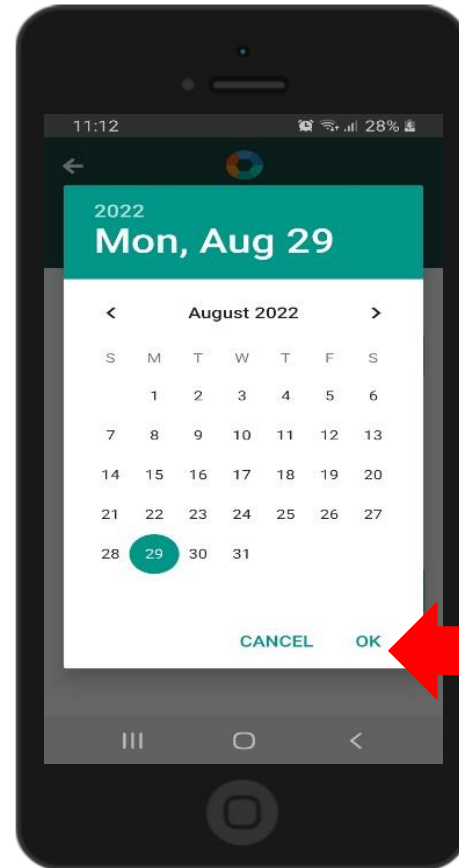
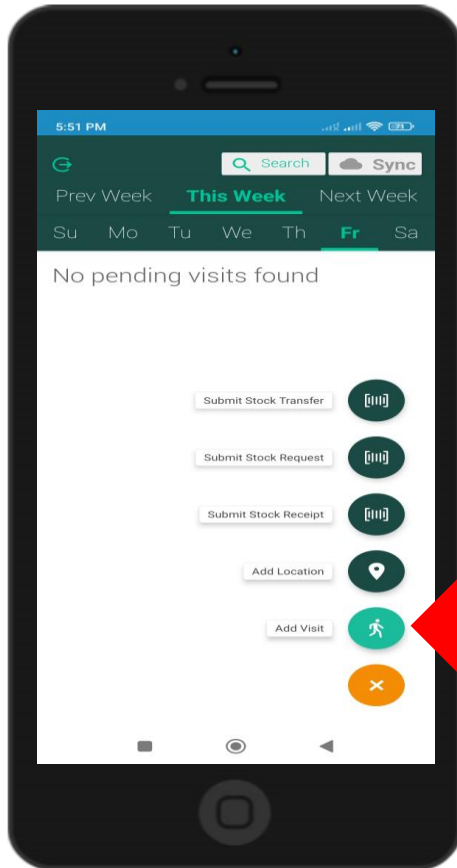
You may turn off your internet connection after your schedule has finished loading as the app works offline.





# OptimMerchandising – Mobile Application Tutorial (Retail Execution)

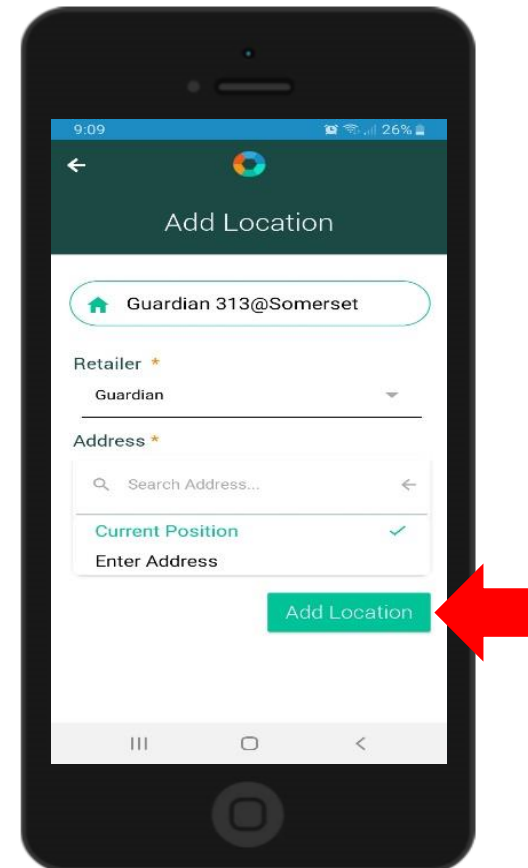
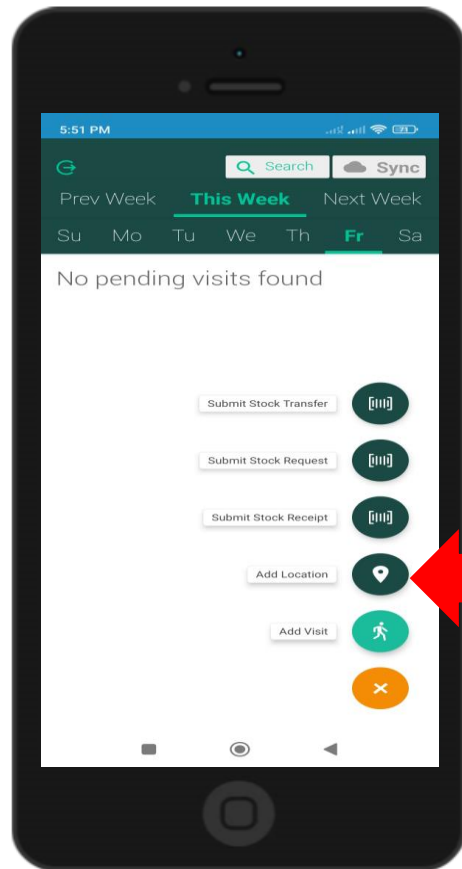
**2. Create a visit (only available if online).** To create a visit, tap the + button and select Add Visit. Choose a date, location, and tasks from the drop-down list. Add as many tasks as needed. Then tap Add Visit.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

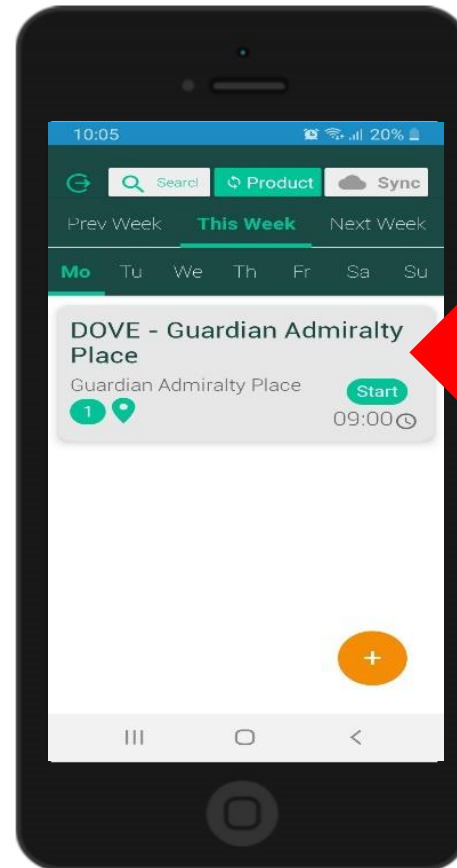
**3. Create a location (only available if online).** To create a location, tap the + button and select Add Location. Then type the location name. Select the retailer from the drop-down list. For the address, you may choose “Current Position” which will automatically get the address based on the GPS coordinates of your current position or “Enter Address” which will require you to manually input the location address. Then tap Add Location.





## Optim Merchandising – Mobile Application Tutorial (Retail Execution)

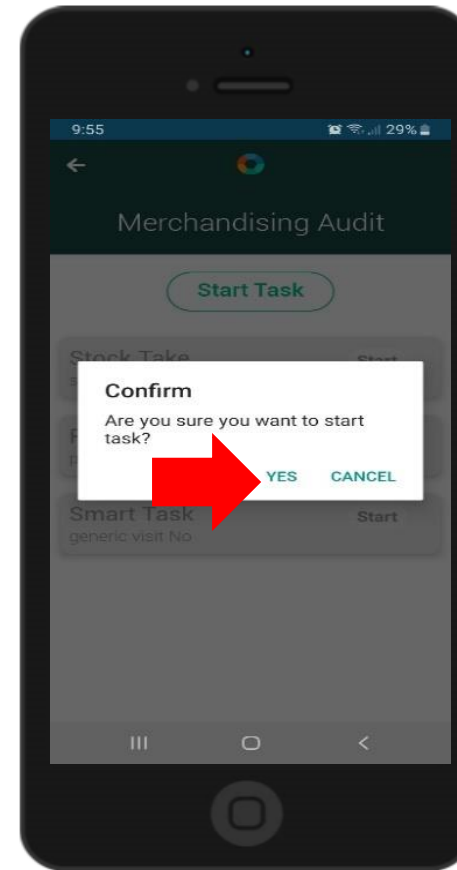
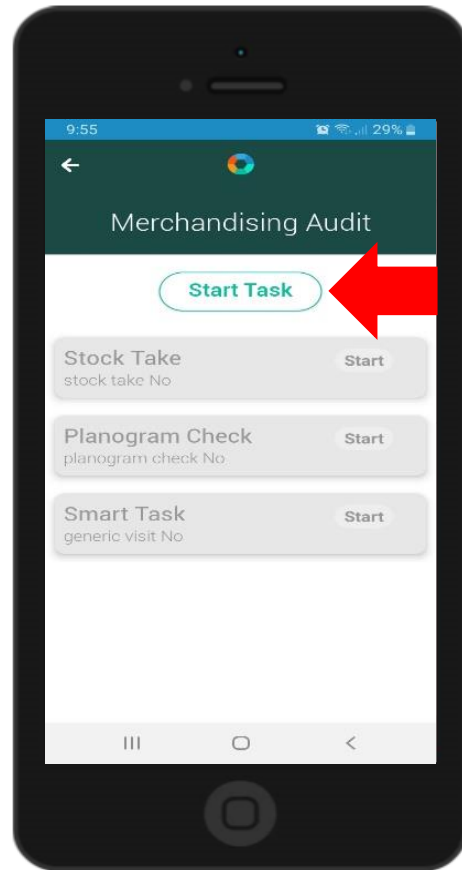
4. **Conduct the visit.** To open a visit, simply tap it on the screen.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

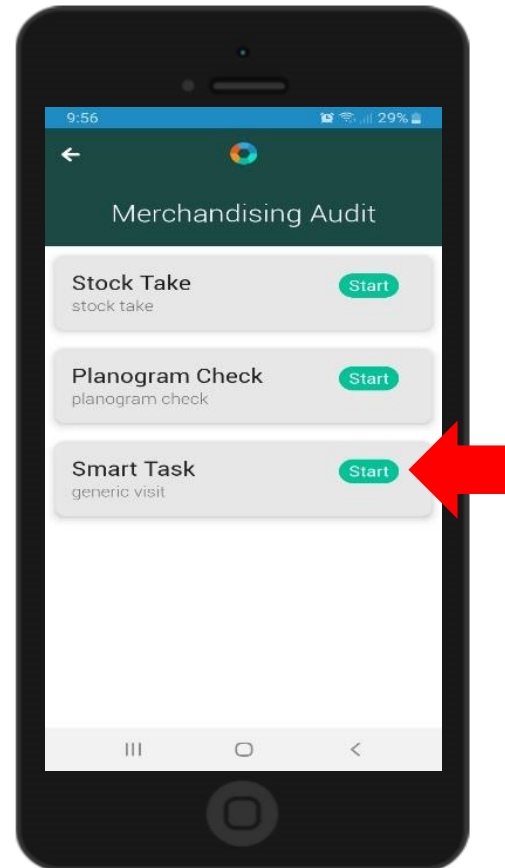
Once inside, you will find a list of tasks. To begin working on the tasks, tap the Start Task button. This retrieves the GPS coordinates of your current position. You won't be able to work on any tasks without tapping this button first.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

Tap a task to begin working on it.

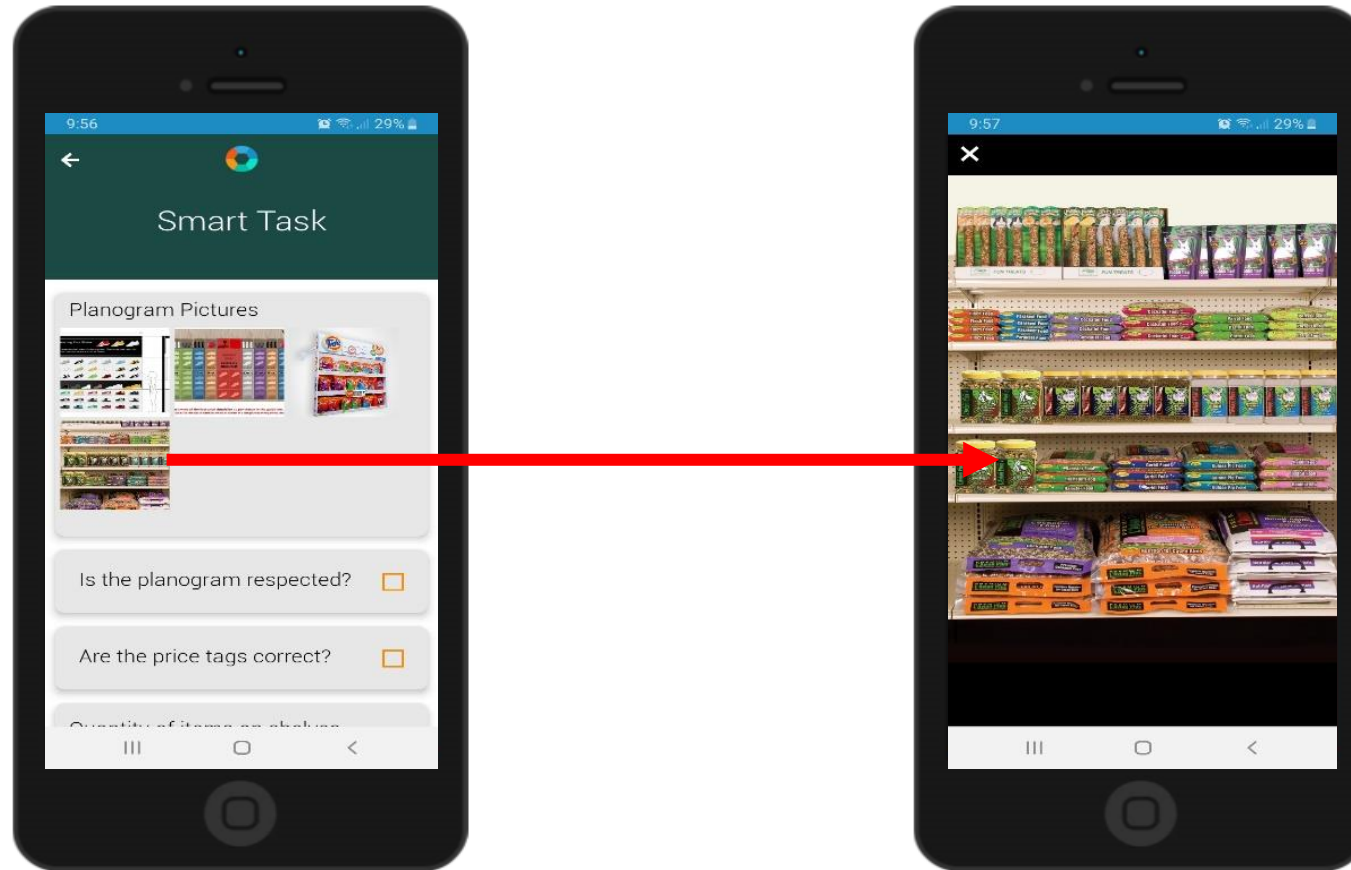






## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

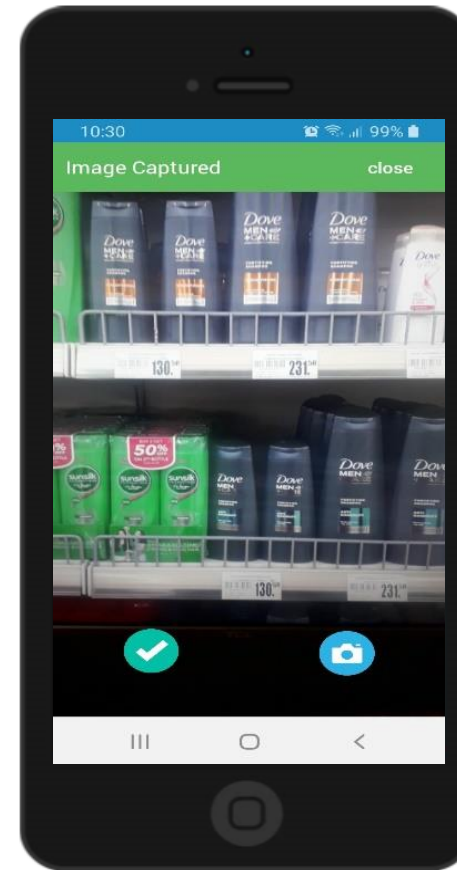
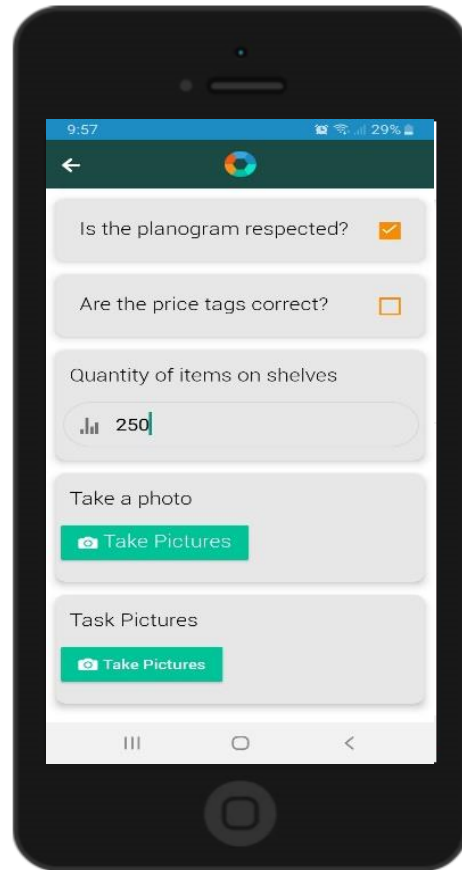
In a smart task, planogram pictures assigned to a location are displayed at the beginning of the task items. Tap an image to enlarge. To assign pictures to a location, on the platform go to Settings > Location Settings > Planogram Pictures > Add Planogram > Assign Planogram to Locations.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

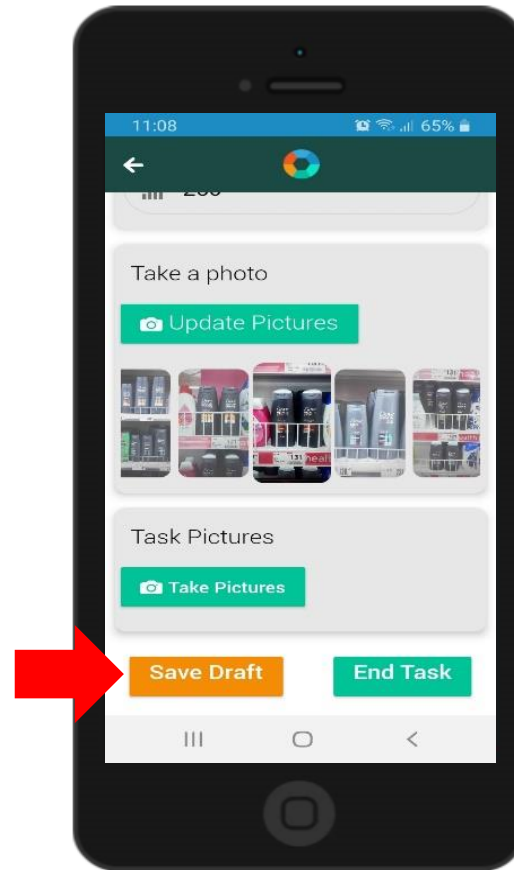
Complete the task items such as tick the box if yes or leave it blank if no. Enter numbers and texts. Choose from selections (multiple choice) and take photos. Wait for the "Image Captured" message before turning off the camera or taking another photo.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

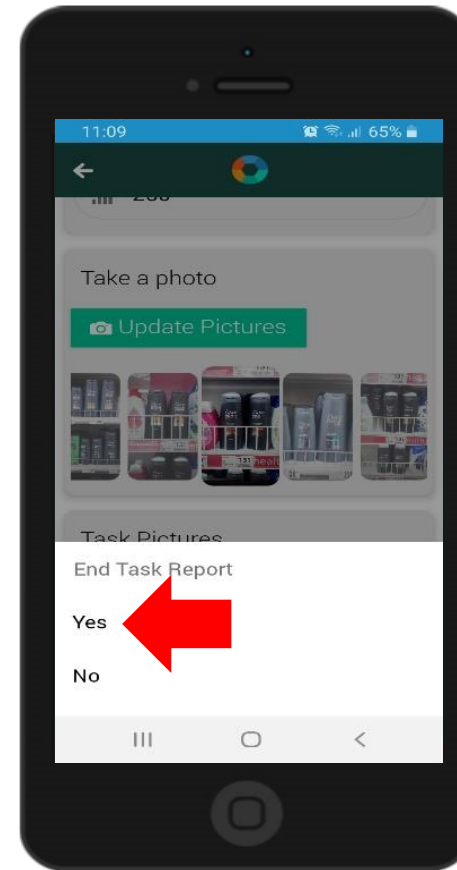
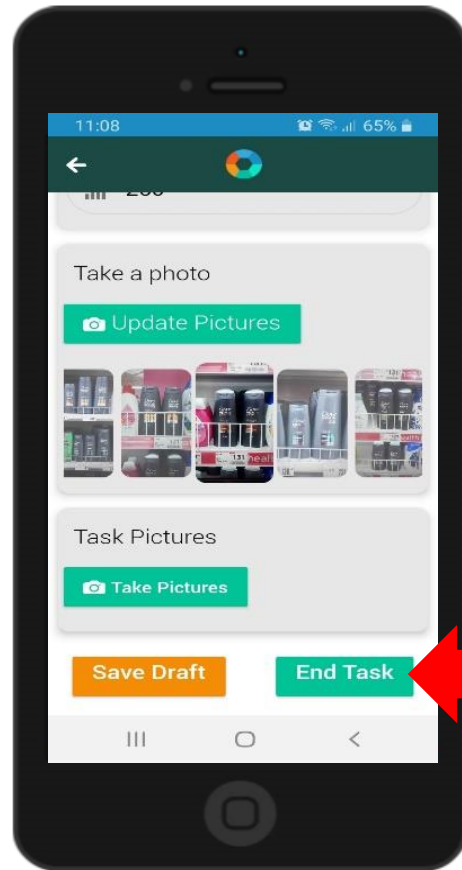
If you need to pause your work, tap Save Draft to save your progress.





## OptimMerchandising – Mobile Application Tutorial (Retail Execution)

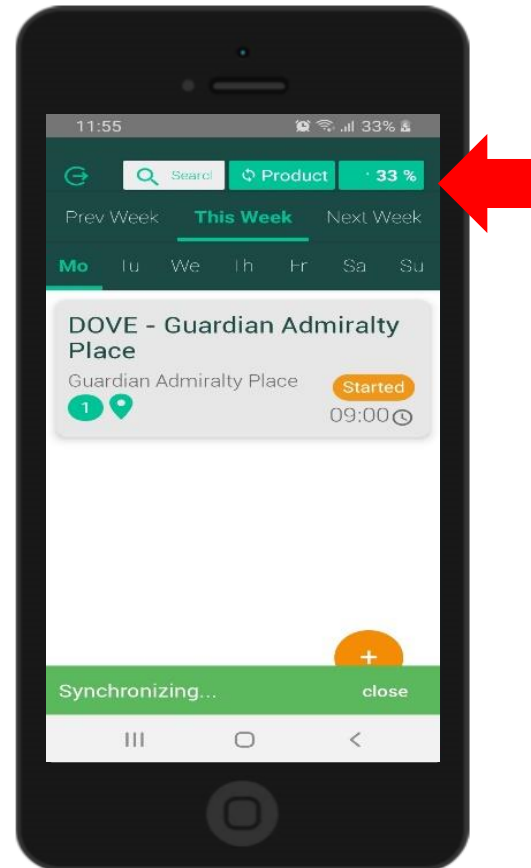
**5. End Task.** Upon completion of all the task items, tap End Task to conclude the task. Once a task has been ended, it is no longer possible to make any changes.





## Optim Merchandising – Mobile Application Tutorial (Retail Execution)

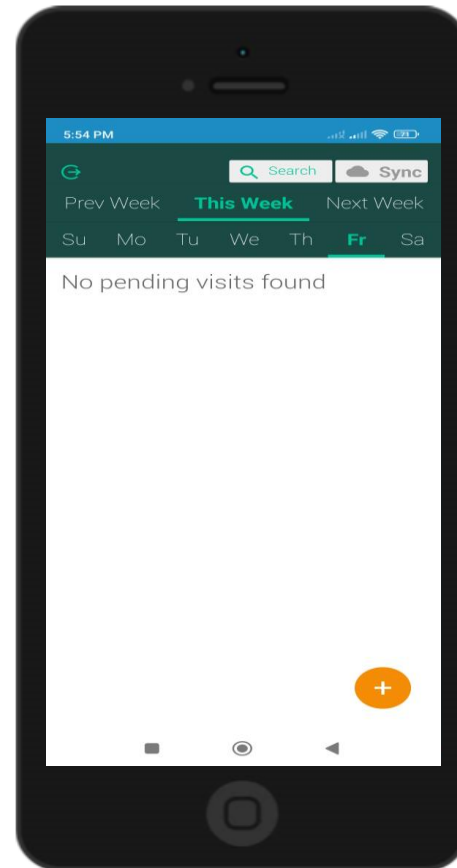
**6. Sync the data to the backend.** When you end a task, you will notice that the Sync button changes to green, indicating that data is waiting to be synced. Tap Sync to begin the syncing process (needs internet connection).





## Optim Merchandising – Mobile Application Tutorial (Retail Execution)

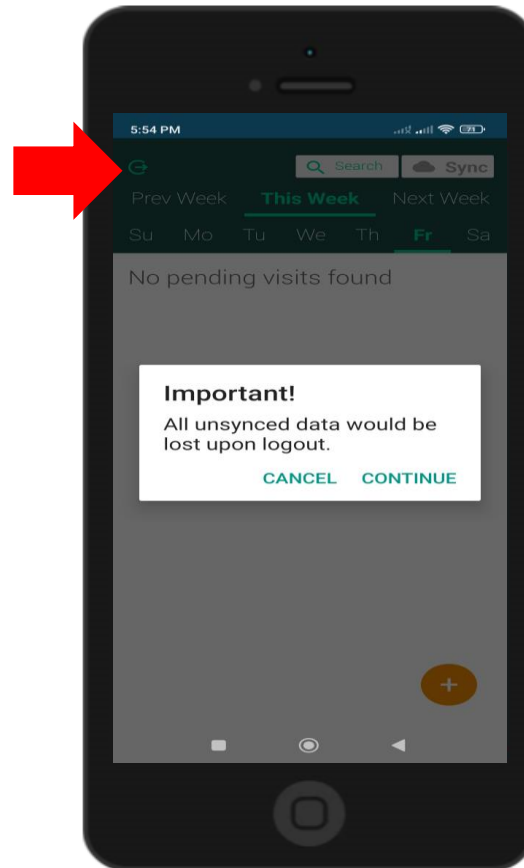
Once all the tasks in a visit have been completed and synced, the visit disappears from the screen.





## Optim Merchandising – Mobile Application Tutorial (Retail Execution)

If you wish to log out of the application, please note that all unsynced data will be lost. Thus, ensure that you sync your work to the backend before logging out.





# Optim Merchandising – Mobile Application Tutorial (Retail Execution)

## 7. Troubleshooting

	Error	Cause	Solution
1	Unable to log in	Wrong username or password	Check if the credentials that you entered are correct.
		No internet connection	Connect to a Wi-Fi signal or data connection. Ensure that your mobile is not in airplane mode.
2	Merchandiser can't create visits or add locations on the app.	Permission is disabled on the platform.	Go to Settings > Company Settings > turn on toggle to allow merchandisers to create visits and locations on the app.
3	No visit schedule can be found on the weekly dashboard.	No visit was scheduled on the platform.	Create a visit on the platform or directly on the app.
		Visit is assigned to another Merchandiser.	Check in the Visits or Calendar tab whom the visit was assigned.
4	When adding visits on the app, no locations and tasks appear in the list.	Merchandiser is not assigned to the client.	Assign Merchandiser to Client. On the platform, go to Settings > Location Settings > Client > edit > Add Merchandiser > Submit.





# OptimMerchandising – Mobile Application Tutorial (Retail Execution)

## 7. Troubleshooting

	Error	Cause	Solution
5	Start buttons are unresponsive.	Start Task button is not yet activated.	Tap the Start Task button to enable working on tasks.
6	Additional Information		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.