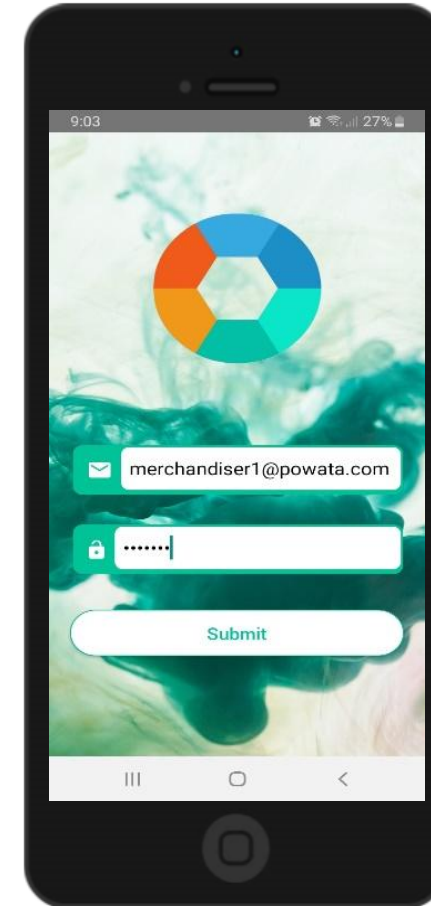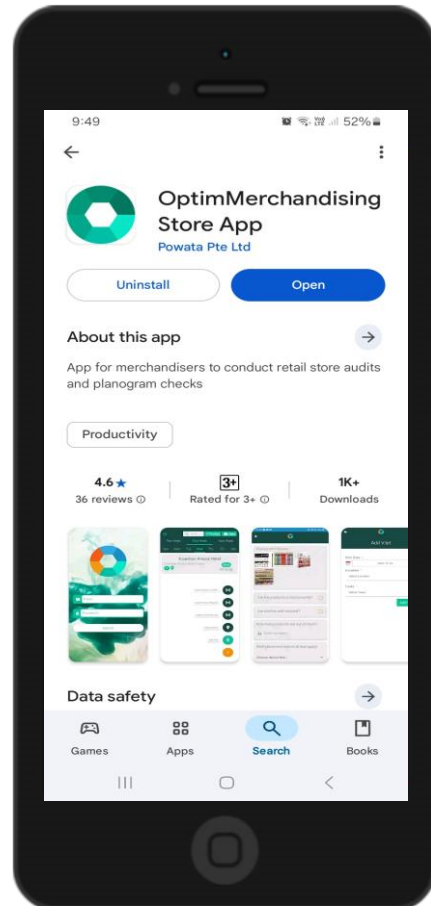# optimMerchandising Mobile Application Tutorial

1. Download the **OptimMerchandising Store App** from Google Play or the App Store on your device. Then, log in using your merchandiser credentials.

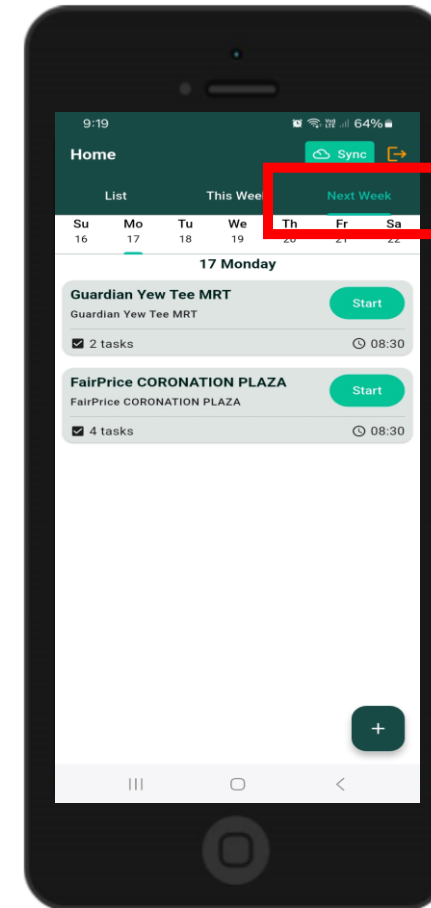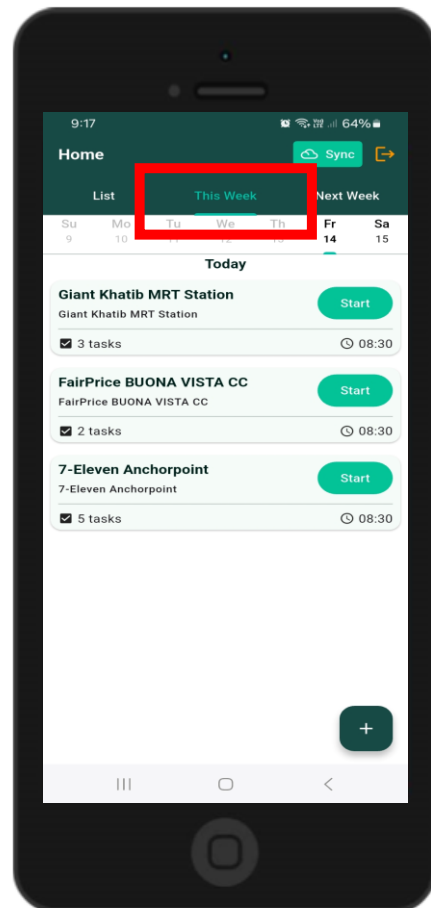# optimMerchandising Mobile Application Tutorial

Once you log in, you'll be taken to the list view, where you can see your scheduled visits for the previous, current, and upcoming week. You have the flexibility to complete any visits within these timeframes. The screen will only display visits that are specifically assigned to you.

Once your schedule has fully loaded, you can disconnect from the internet, as the app functions seamlessly offline.

Sync / Refresh

Log out

List of Visits

Start button

+ button
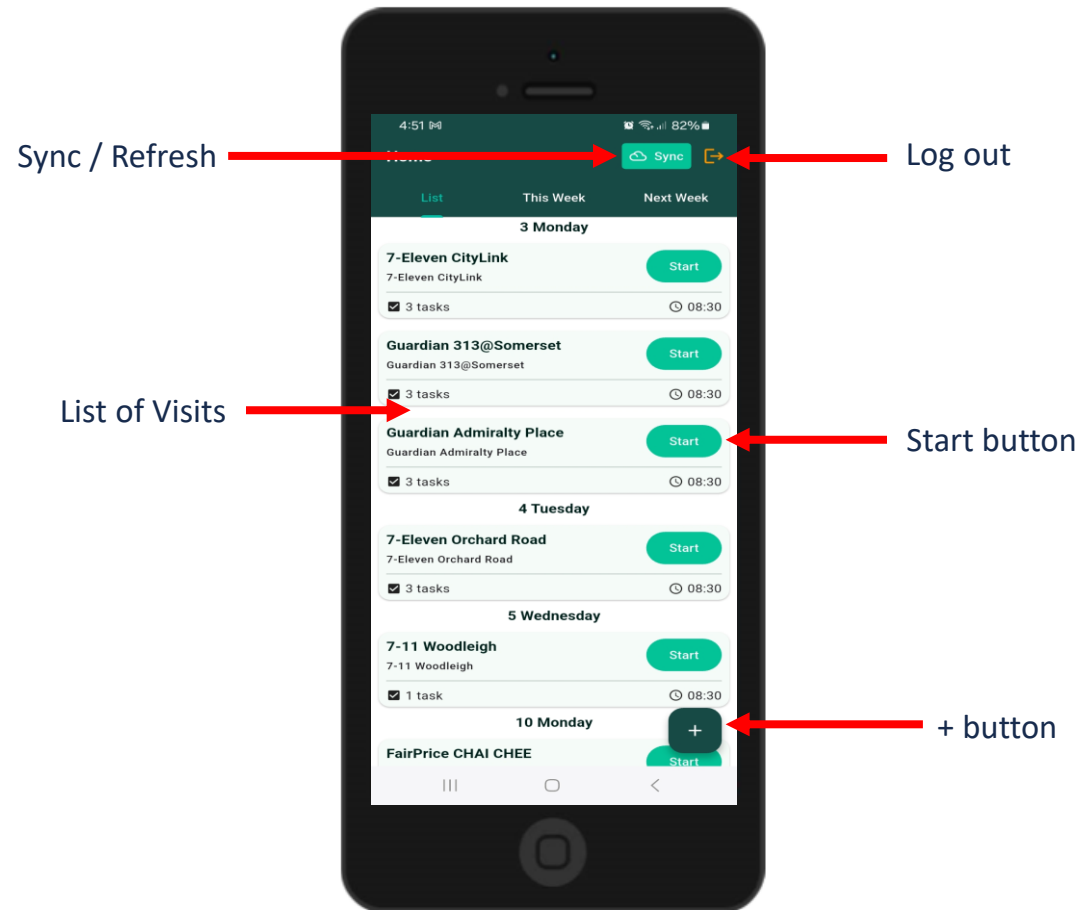
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You can also view your scheduled visits in the weekly calendar, where they are organized by their assigned dates.
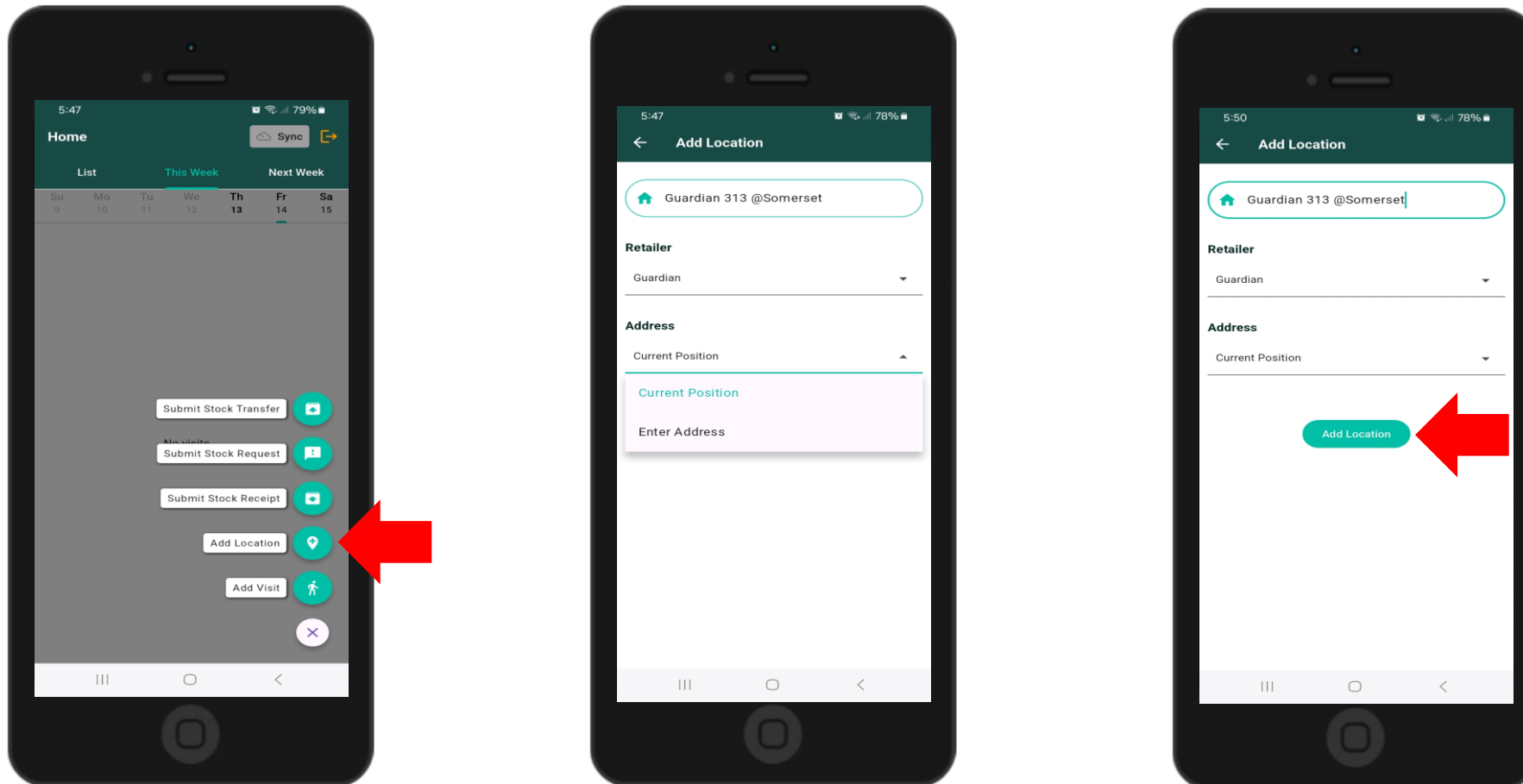
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2. **Create a Visit (available online only)**. To create a new visit, tap the + button and select **Add Visit**. Choose the date, location, and tasks from the drop-down lists. You can add multiple tasks as needed. Once everything is set, tap **Add Visit** to save it.
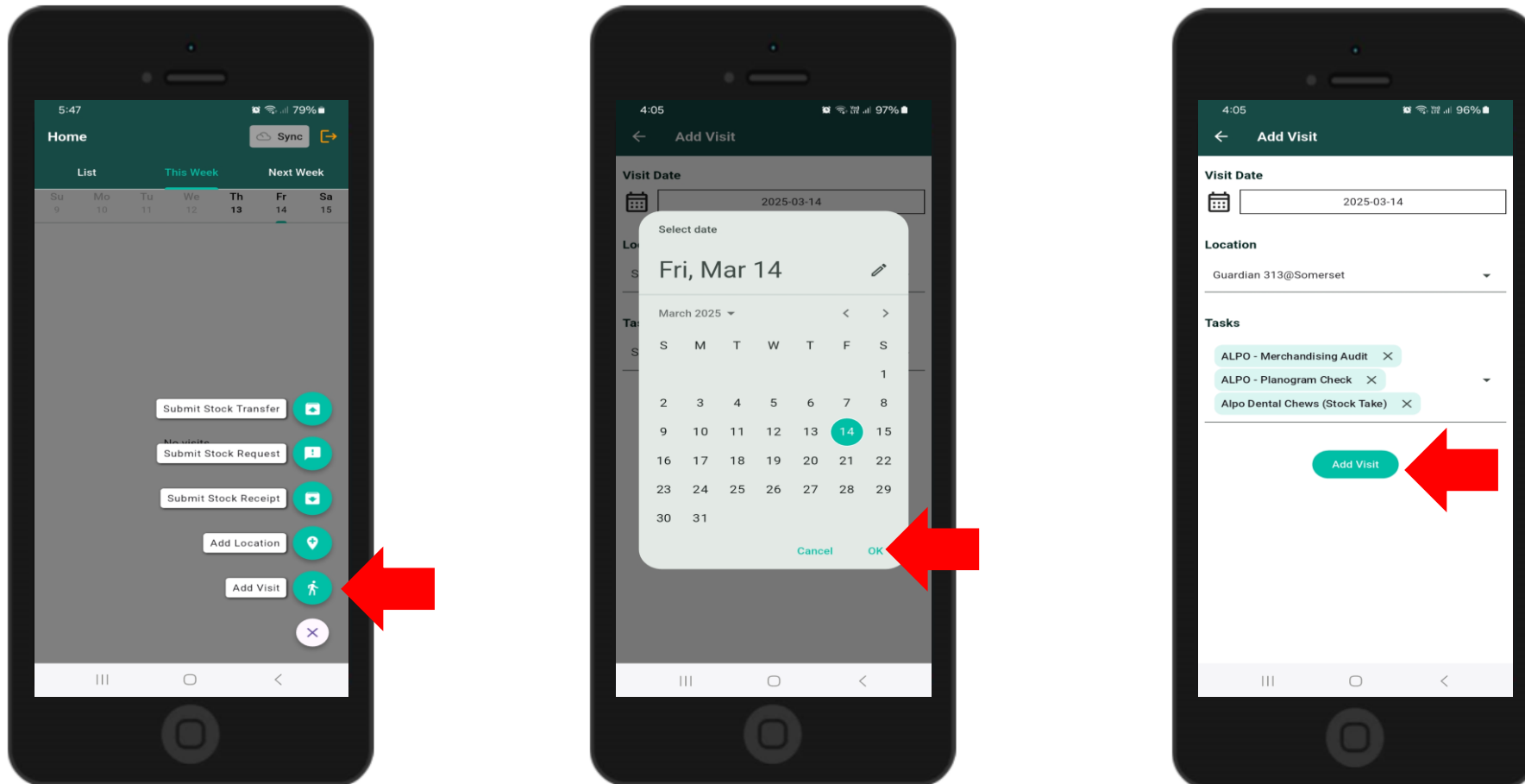
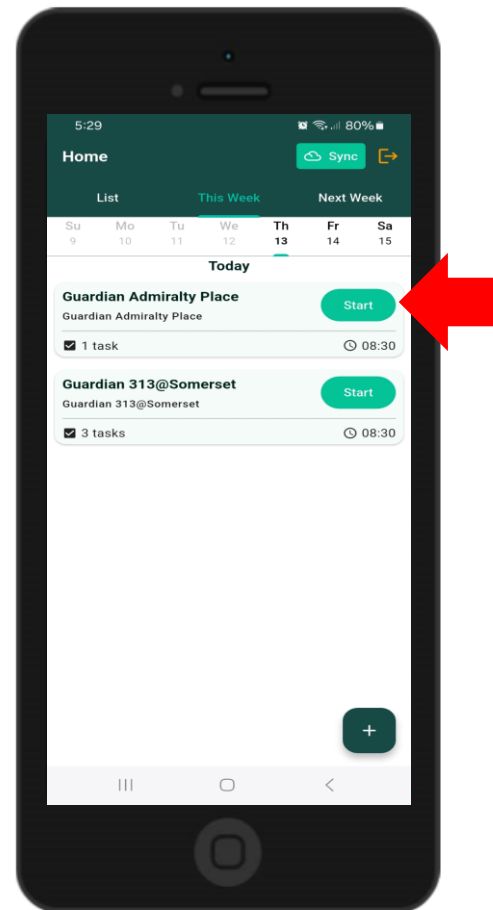**optimMerchandising Mobile Application Tutorial**

3. **Create a Location (available online only)**. To create a new location, tap the + button and select **Add Location**. Enter the location name and choose the retailer from the drop-down list. For the address, you have two options: a. **Current Position** – automatically retrieves the address based on your GPS coordinates b. **Enter Address** – manually input the location's address.

Once done, tap **Add Location** to save it.

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4. **Conduct the visit**. To begin a visit, simply tap the **Start** button. You have the flexibility to start any visit in any order, as there are no restrictions on which visits you complete first.
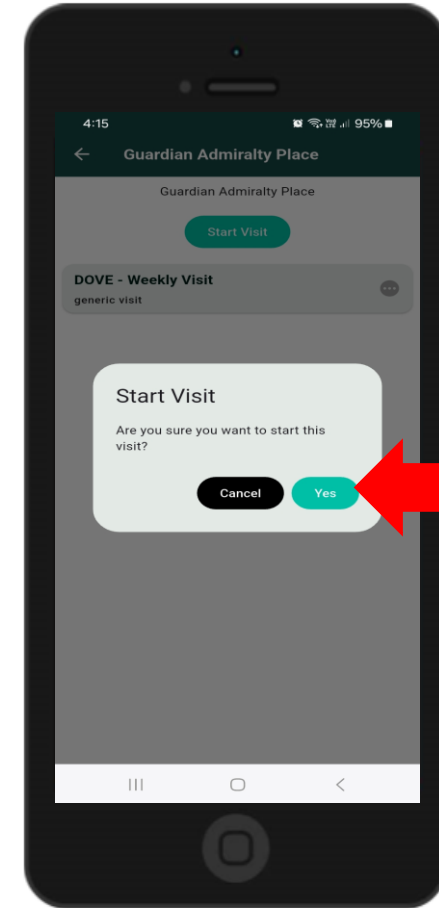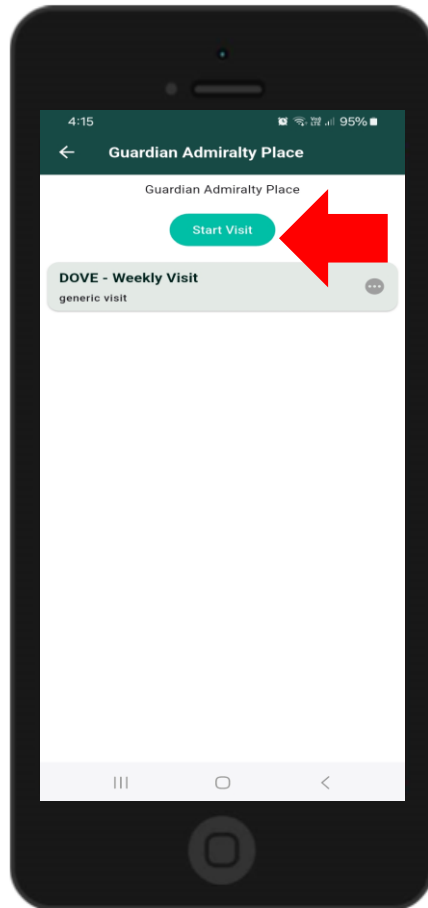
optimMerchandising **Mobile Application Tutorial**

Grant the location permission requested by the app to enable geotagging functionality.
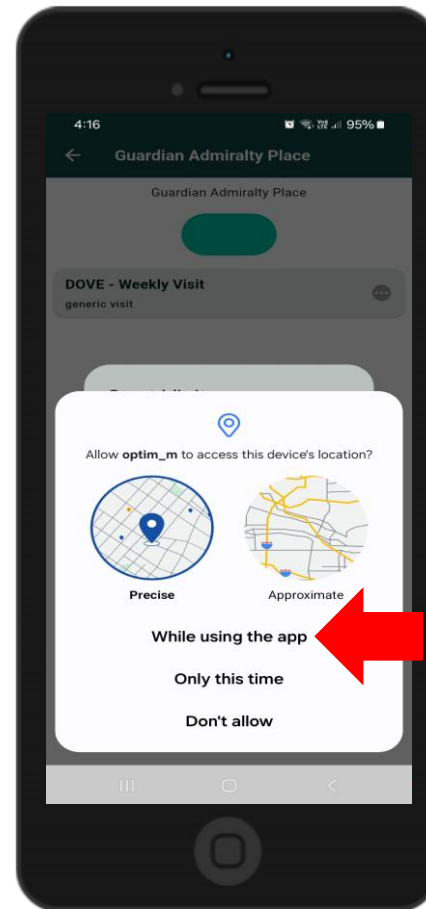
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To begin working on the tasks, tap the **Start Visit** button. This retrieves the GPS coordinates of your current position. You won't be able to work on any tasks without tapping this button first. Confirm with **Yes** when prompted.

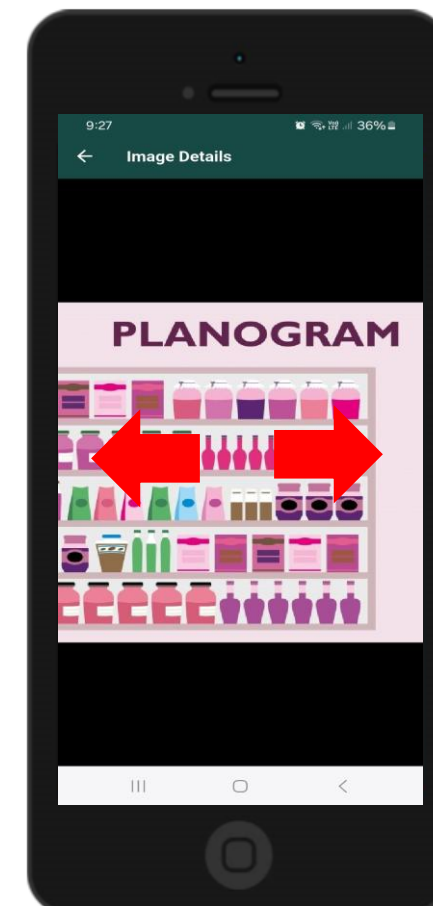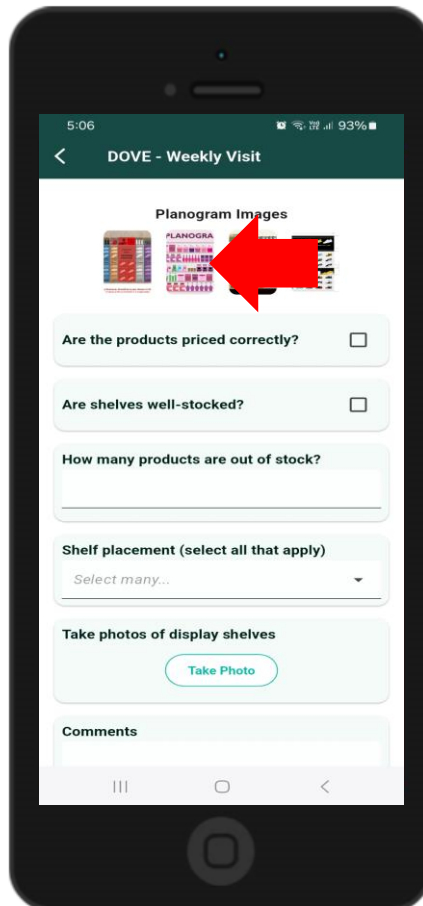![optimMerchandising logo] **optim**Merchandising **Mobile Application Tutorial**

Tap the **Start** button to open the task.
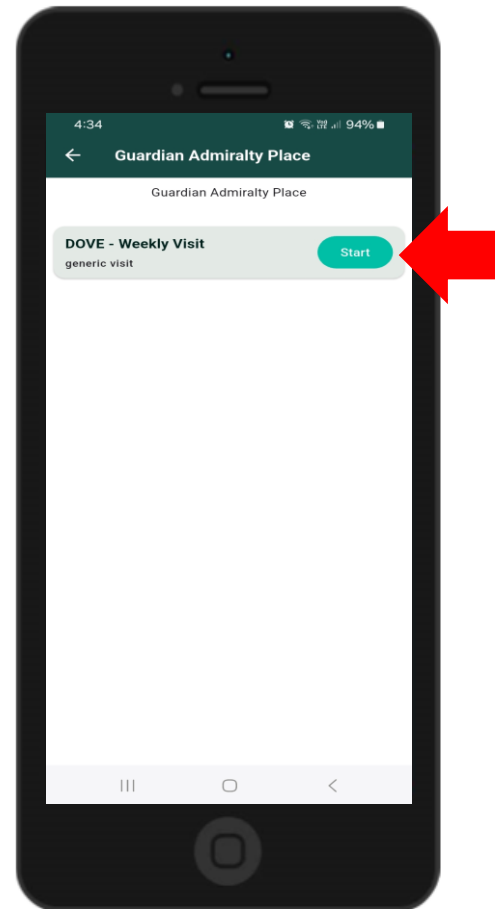
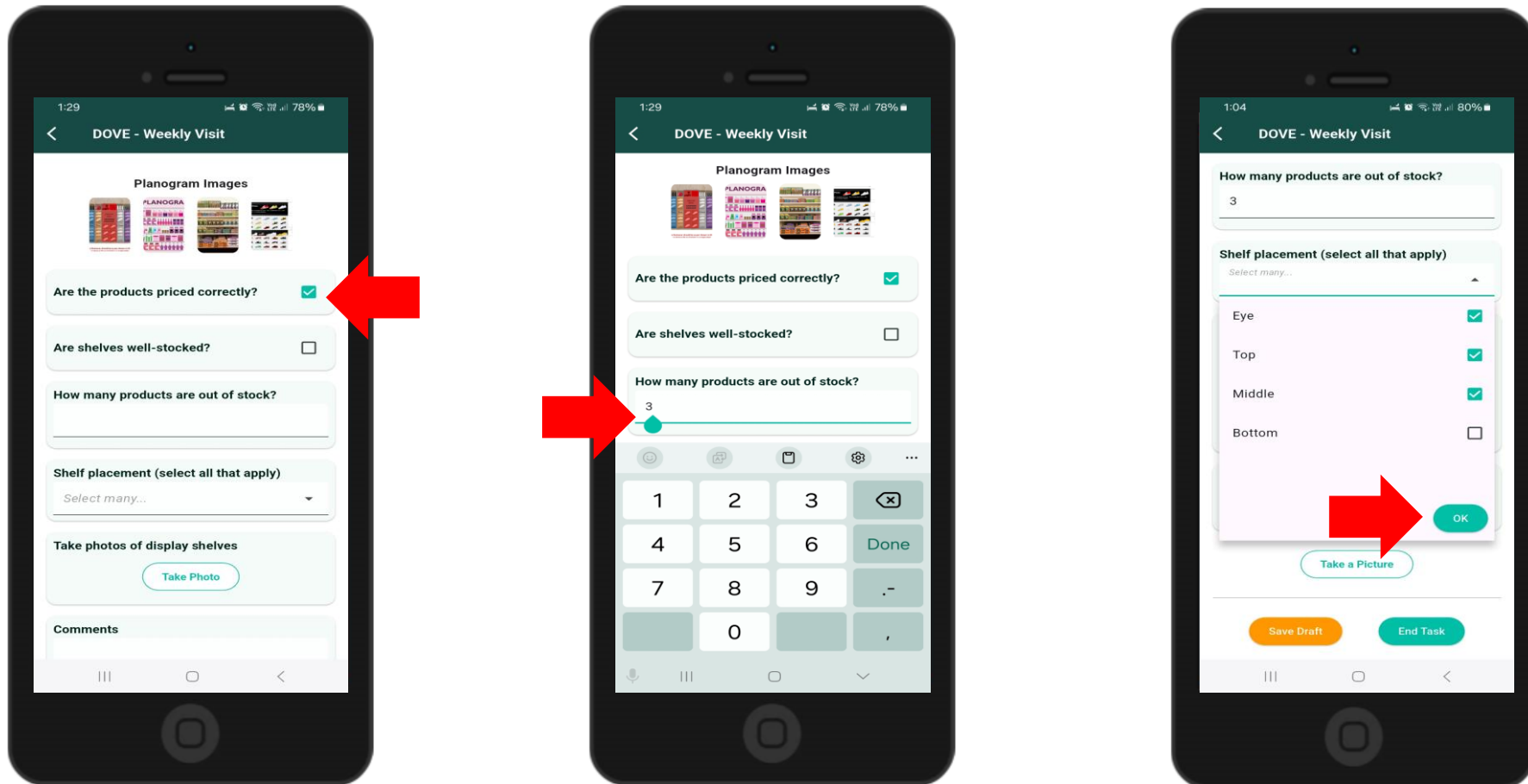**optim**Merchandising **Mobile Application Tutorial**

In a smart task, planogram images assigned to a location appear at the top of the screen, above the task items. Tap an image to enlarge it, and use a two-finger outward swipe to zoom in further.

To assign planogram images to a location in the web app, navigate to: Settings > Location Settings > Planogram Pictures > Add Planogram > Assign Planogram to Locations.

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Complete the task items by ticking the box if yes or leaving it blank if no. Enter numbers and text as required. For multiple-choice questions, select from the available options. When creating the task item in the web app, numerical weights can be assigned to the options.

After taking a photo, review it to ensure you're satisfied. If the picture looks good, tap the checkmark button to save it. If not, press the back button to discard the photo and take another one.
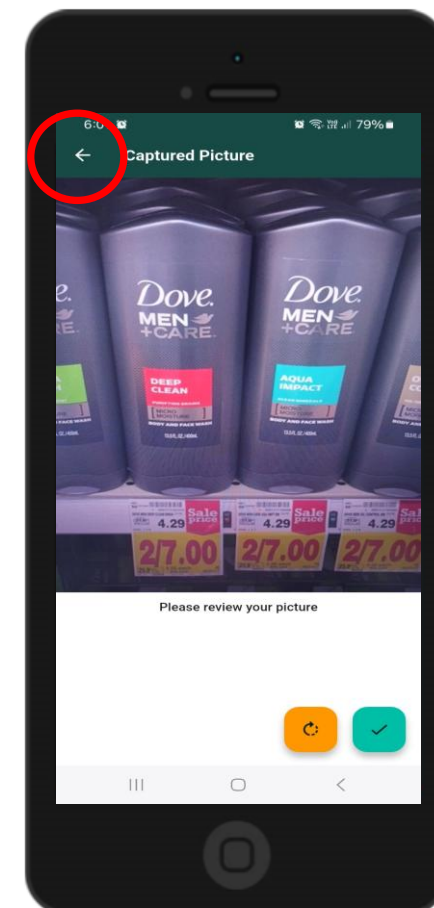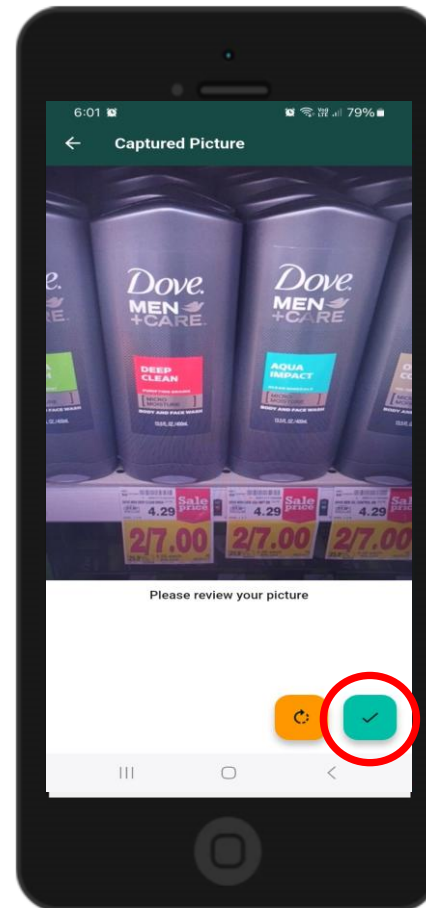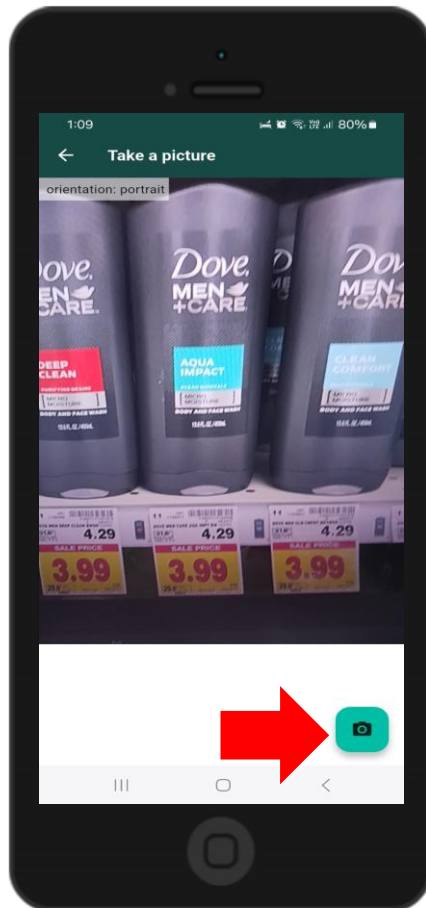
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If the photo was captured in landscape orientation and needs to be displayed in portrait, tap the rotate button until it is correctly oriented. Then, confirm the change by tapping the checkmark button.
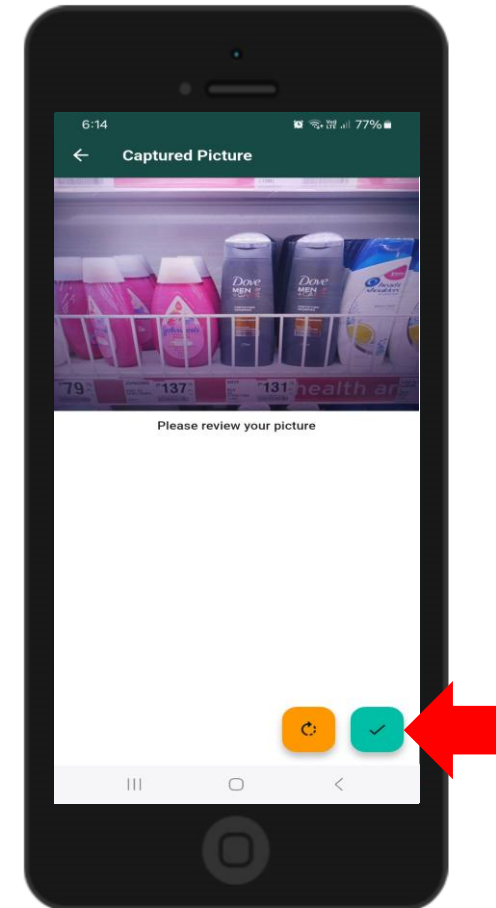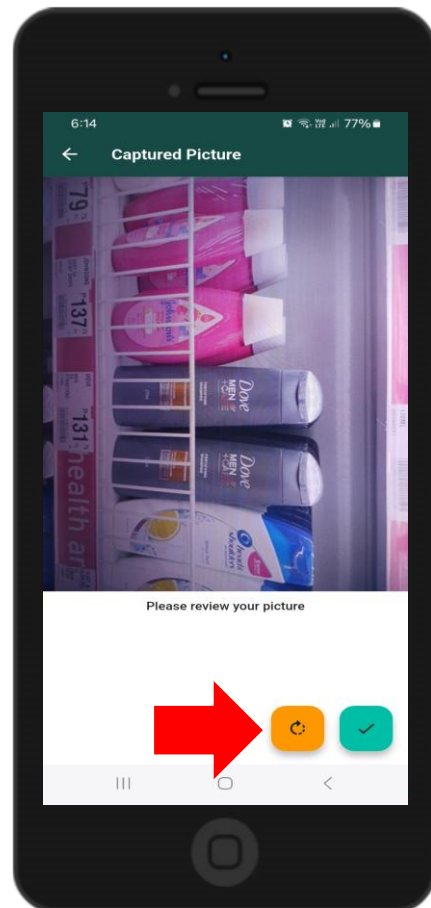
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To delete a photo, tap to enlarge it, then press and hold for a few seconds. A prompt will appear asking for confirmation—tap **Yes** to delete.
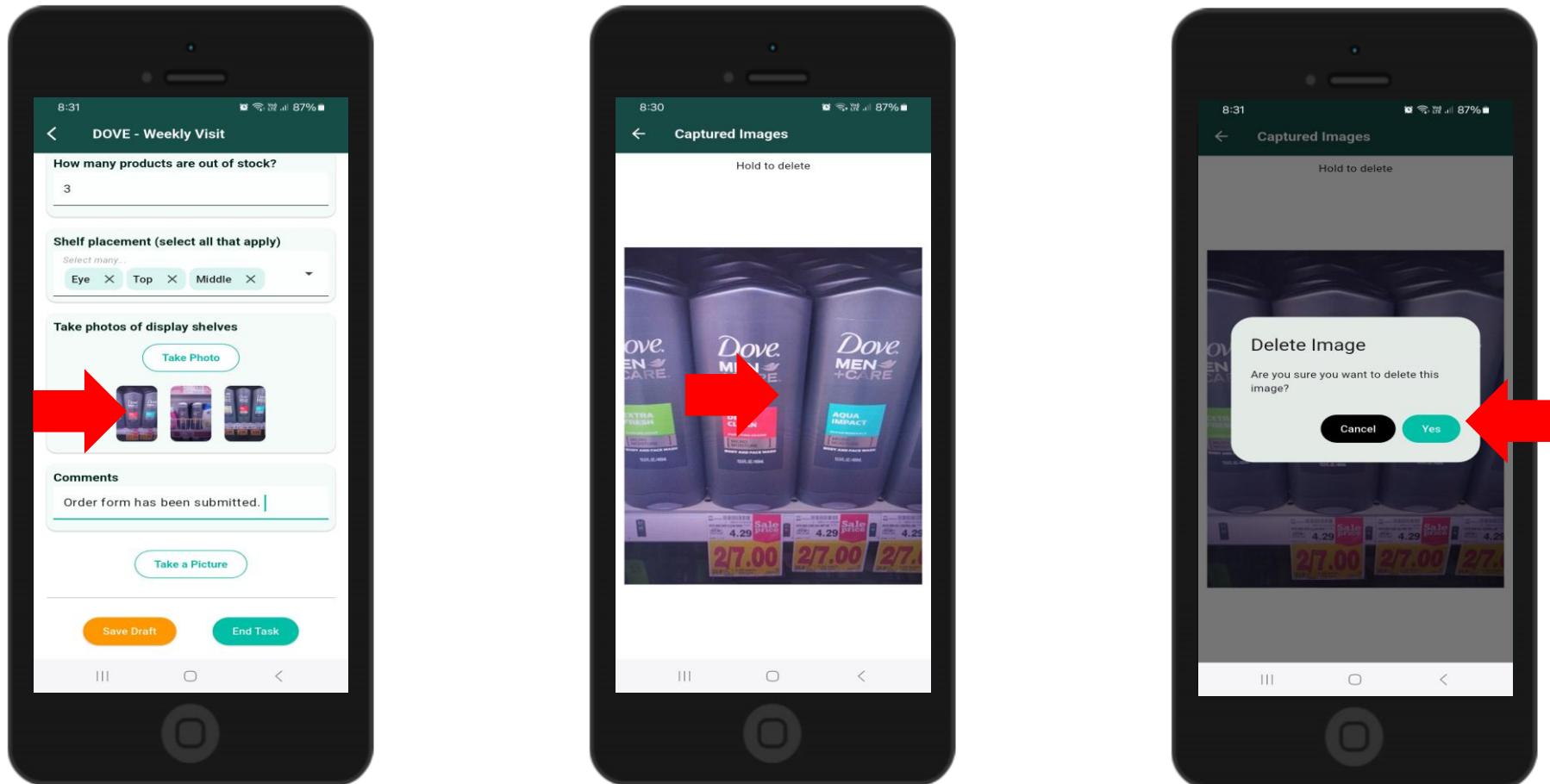
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If you need to pause your work, tap **Save Draft** to save your progress.
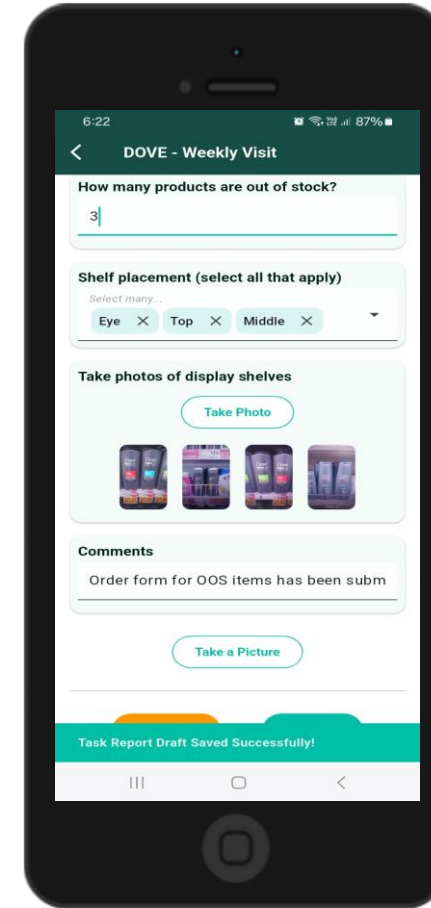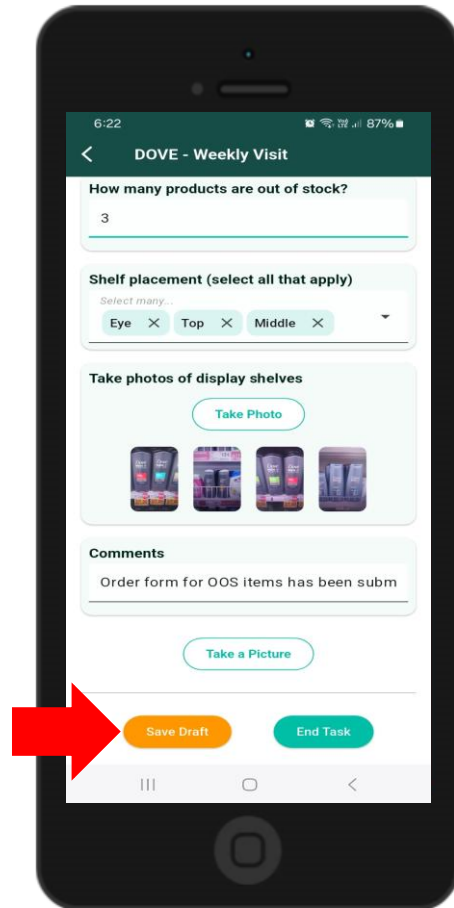
5. **Ending a task**. Once all task items are completed, tap **End Task** to finalize the task. After ending a task, no further changes can be made.
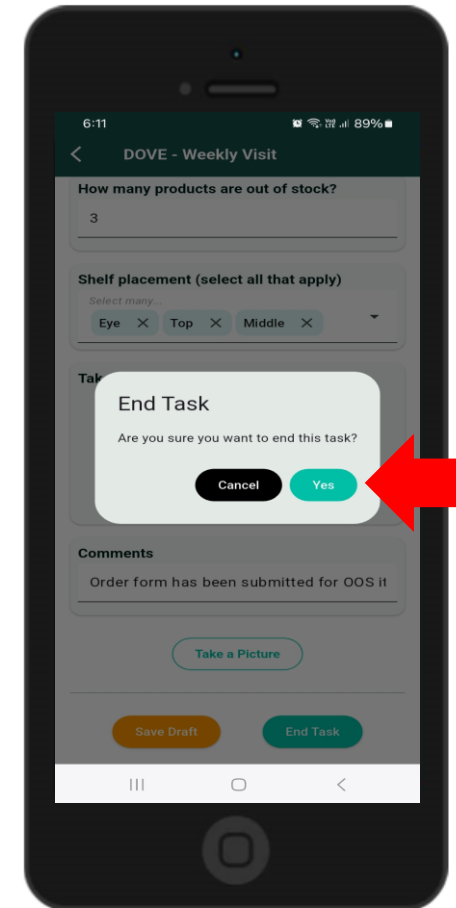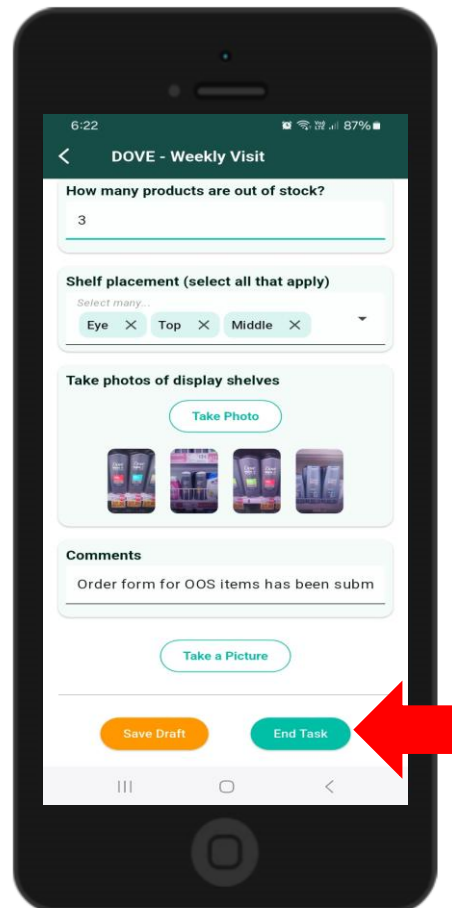
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6. **Syncing the data to the backend**. When you complete a task, you can choose to sync it immediately, after finishing a visit, or wait until all your visits for the day are completed before syncing. Tap **Sync** to start the syncing process (an internet connection is required).
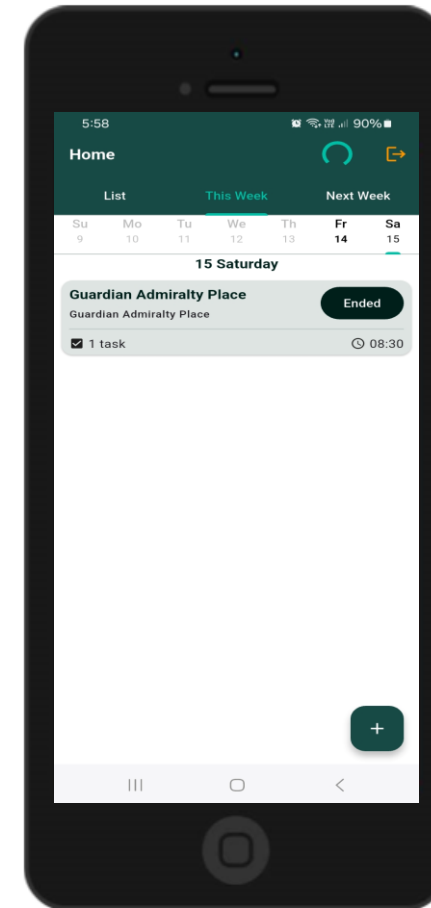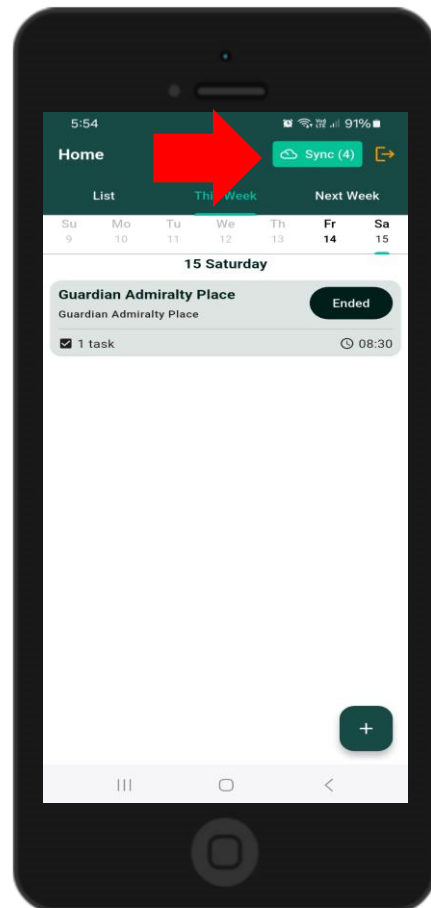
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Once a visit has finished syncing, it will disappear from the screen.

Note: Reports will only appear in the web app once all tasks in a visit are completed. If any task within a visit remains pending, the associated reports will not be visible in the web app, even after syncing.
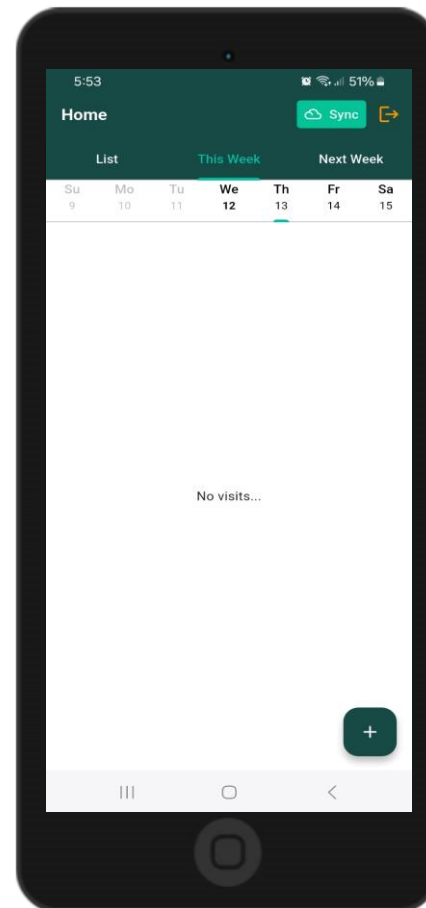
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If you wish to log out of the application, please be aware that any unsynced data will be lost. To prevent data loss, ensure that you sync all your work to the backend before logging out.
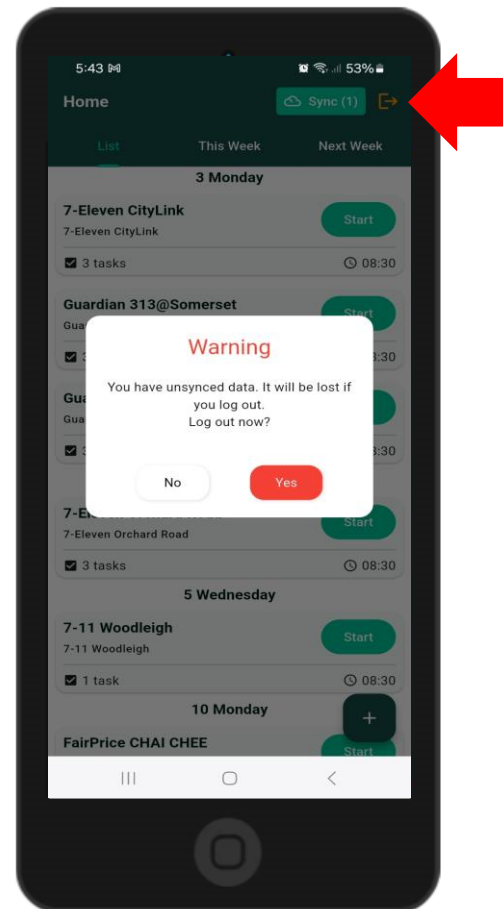
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7. Troubleshooting

	Error	Cause	Solution
1	Unable to log in	Incorrect username or password	Verify that the credentials entered are correct.
		No internet connection	Connect to a Wi-Fi signal or mobile data. Ensure that your mobile device 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 and enable the toggle to allow merchandisers to create visits and locations on the app.
3	No visit schedule found on the 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 the Visits or Calendar tab to see which merchandiser the visit was assigned to.
4	No locations and tasks appear when adding visits on the app.	Merchandiser is not assigned to the client.	Assign the merchandiser to the client in the web app. Go to Settings > Location Settings > Client > edit > Add Merchandiser > Submit.
5	Start button is unresponsive.	Start Visit button is not yet activated.	Activate the Start Visit button to begin working on tasks.
6	Additional Information		For Android devices, the minimum supported OS version is Android 11. Ensure at least 50 MB of available internal storage on your phone.