



Planogram Compliance Checks

This document will show you, step-by-step, how to setup retail planogram compliance checks on VisitBasis.

Step 1 - Have a Product Database

Option 1 - Add your products one by one on the Products tab:
Select a Division -> "Add Product"

Add Product

Barcode *

Description *

Unit type ▼

Pack of *

Minimum increment *

Weight *

Is new (?)

Sell by

Is active

Properties (?)

Name	Value

[Copy To Excel](#)

Note: It is important for the barcode to be consecutive numbers, with no spaces. Finish filling in the information and click on save.

OR

Option 2 - Import a product spreadsheet:

1. Export your existing VisitBasis product database to generate a template:
Go to Settings -> Export Data, choose Products from the drop-down, and click on Download.
2. Open the file in Google Sheets or Excel and copy and paste your product information.
 - Make sure to set up the barcode column as plain text.
3. Save the file as Comma-separated-values (CSV-UTF8) or TXT.
4. Import the new file into VisitBasis:
 - Go to Settings -> Import Data, choose Products from the drop-down, and click on Choose File.
 - Select our file, then we follow the importing steps.
 - Select "insert new data" in step 2.
 - Click on "Ok, Import it!" in step 3.
5. On the products tab, we see that we have our product database setup.

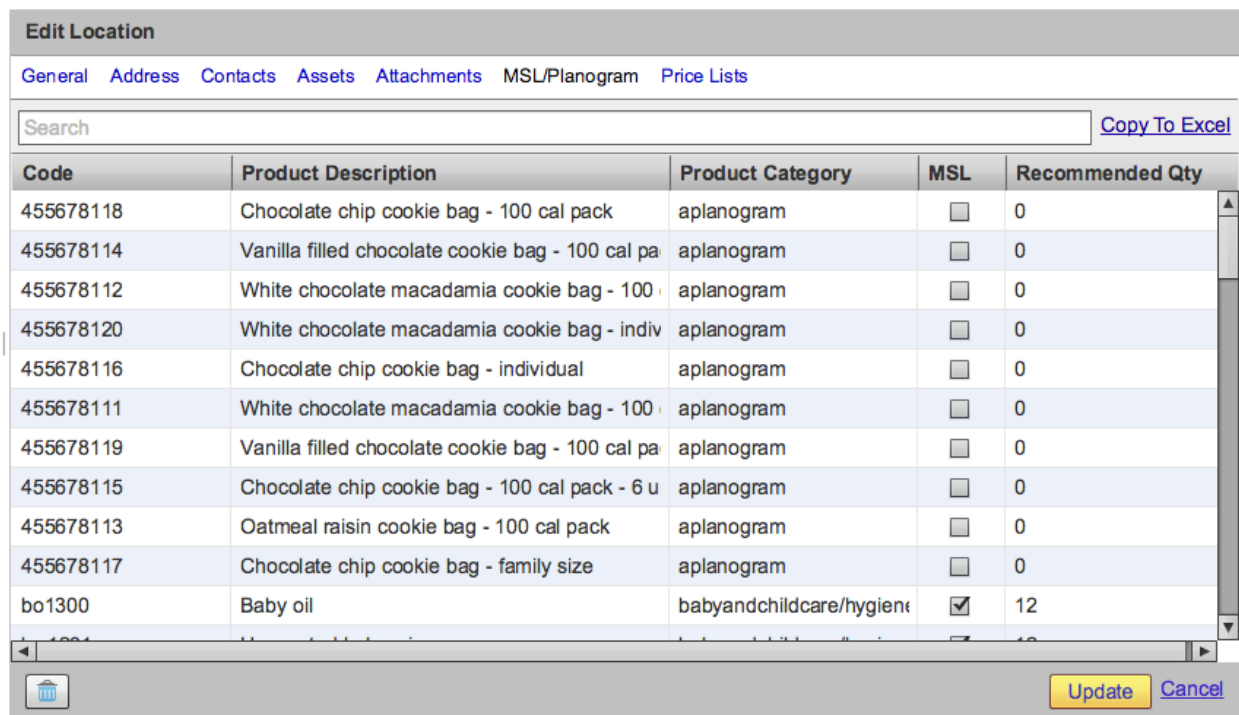
Step 2 - Configure Must-Stock-Lists (MSLs) for Locations

Option 1 - Edit MSL/Planogram on VisitBasis

1. Go to Locations tab.
2. Select a location.
3. Click on the location's MSL/Planogram window.

Here you can specify whether each one of our products is on the location's must-stock-list (by checking the MSL box) and the recommended quantity of each product.

- **TIP:** You can copy/paste data directly from a spreadsheet editor such as Excel by clicking on the "Copy to Excel" link



The screenshot shows the 'Edit Location' interface with a navigation bar containing 'General', 'Address', 'Contacts', 'Assets', 'Attachments', 'MSL/Planogram', and 'Price Lists'. Below the navigation bar is a search field and a 'Copy To Excel' link. The main table has the following columns: Code, Product Description, Product Category, MSL, and Recommended Qty. The table contains 12 rows of product data.

Code	Product Description	Product Category	MSL	Recommended Qty
455678118	Chocolate chip cookie bag - 100 cal pack	aplanogram	<input type="checkbox"/>	0
455678114	Vanilla filled chocolate cookie bag - 100 cal pa	aplanogram	<input type="checkbox"/>	0
455678112	White chocolate macadamia cookie bag - 100	aplanogram	<input type="checkbox"/>	0
455678120	White chocolate macadamia cookie bag - indiv	aplanogram	<input type="checkbox"/>	0
455678116	Chocolate chip cookie bag - individual	aplanogram	<input type="checkbox"/>	0
455678111	White chocolate macadamia cookie bag - 100	aplanogram	<input type="checkbox"/>	0
455678119	Vanilla filled chocolate cookie bag - 100 cal pa	aplanogram	<input type="checkbox"/>	0
455678115	Chocolate chip cookie bag - 100 cal pack - 6 u	aplanogram	<input type="checkbox"/>	0
455678113	Oatmeal raisin cookie bag - 100 cal pack	aplanogram	<input type="checkbox"/>	0
455678117	Chocolate chip cookie bag - family size	aplanogram	<input type="checkbox"/>	0
bo1300	Baby oil	babyandchildcare/hygiene	<input checked="" type="checkbox"/>	12

At the bottom of the interface, there is a trash icon, an 'Update' button, and a 'Cancel' link.

OR

Option 2 - Import MSL/Planogram

1. Open your existing MSL/Planogram information.
Many VisitBasis users have existing spreadsheets such as the one below, listing a location code and the quantity of each SKU available at each location:

locationCode	455678118	455678114	455678112	455678120	455678116	455678111
p10	12	20	12	10	12	20
p11	12	20	12	10	12	20
p12	12	10	6	0	12	10
p13	12	10	6	0	12	10
p14	12	10	6	0	12	10
p15	12	10	6	0	12	10
p16	12	10	6	0	12	10
p17	12	10	6	0	12	10
p18	12	20	12	10	12	20
p19	12	10	12	0	12	10
p20	12	10	12	0	12	10

 barcodes
 location codes
 quantity

- Go to <http://www.visitbasis.com/convert> and select MSL.
- Copy your existing MSL/Planogram according to the table in item 1 - including headers.
- Paste into the "Input - locationCode, barcode" box.
- Click on Convert.
- Copy the contents from the "Output - barcode, locationCode, msl, recommendedQty" box.
- Paste into a new Excel/ Google Sheets spreadsheet.
- Save the file as Comma-separated-values (CSV-UTF8) or TXT.

Copy/Paste input data from Excel.

Visit Calendar
 MSL

Input - locationCode, barcode

```
locationCode 455678118 455678114 455678112 455678120 455678116 455678111
p10 12 20 12 10 12 20
p11 12 20 12 10 12 20
p12 12 10 6 0 12 10
p13 12 10 6 0 12 10
p14 12 10 6 0 12 10
p15 12 10 6 0 12 10
p16 12 10 6 0 12 10
p17 12 10 6 0 12 10
p18 12 20 12 10 12 20
```

Output - barcode, locationCode, msl, recommendedQty

```
barcode locationCode msl recommendedQty
455678118 p10 TRUE 12
455678114 p10 TRUE 20
455678112 p10 TRUE 12
455678120 p10 TRUE 10
455678116 p10 TRUE 12
455678111 p10 TRUE 20
455678118 p11 TRUE 12
455678114 p11 TRUE 20
455678112 p11 TRUE 12
```

- Import the new file into VisitBasis:
 - Go to Settings -> Import Data, choose MSL/Planogram from the drop-down, and click on Choose File.
 - Select your file, then we follow the importing steps.
 - Select "insert new data" in step 2.
 - Click on "Ok, Import it!" in step 3.

Import Data

Step 2 of 3 - Map imported fields (MSL/Planogram)

Mandatory fields (*) should be properly mapped.

I would like to:

Insert new data
 Update existing data
 Delete data

VisitBasis Field	Import Field
barcode *	barcode
locationCode *	locationCode
msl	msl
recommendedQty	recommendedQty

TIP: If you have master MSLs for a group of stores – for instance, all Bravo stores share the same must-stock-list – you can simplify your MSL setup and updating process:

1. Choose one of your stores as a reference, or even create a “mock” store to use as a reference.
2. On the other stores, add a property with the name **msl_parent_location_code**. For value, use the code for the location with the reference (or master) MSL. For instance, in the below example, the location is using the MSL from location code "bv1" as a reference:

Properties

Name	Value
msl_parent_location_code	bv1

- To input this information in bulk, you can import a location properties table like this (save as CSV or TXT):

locationCode	propertyName	propertyValue
bv11	msl_parent_location_code	bv1
bv11	msl_parent_location_code	bv1
bv13	msl_parent_location_code	bv1
bv14	msl_parent_location_code	bv1
bv15	msl_parent_location_code	bv1
bv16	msl_parent_location_code	bv1
bv17	msl_parent_location_code	bv1
bv5	msl_parent_location_code	bv1
bv7	msl_parent_location_code	bv1
bv9	msl_parent_location_code	bv1

- Go to Settings -> Import Data, choose "Location Properties" from the drop-down, and click on Choose File.
- Select your file, then we follow the importing steps.

Step 3 - Create a MSL Task

1. Go to the Task Templates tab, and click on "Add Task Template".
2. Type a title and description of your task, choose the appropriate division, and fill in/check any other fields.

3. Go to "Items" and check "Load Location's MSL/Planogram":

Load Location's MSL/Planogram (?)

4. Go to "Actions".
5. Click on "Add" and enter the first question: "Is the product available at the location?"
6. Select "Selection" from the Answer Type drop-down.
 - a. Add the selection option "Yes".
 - b. Add the selection option "No".
Your selection options box will look like this:
 - c. Click "OK".

7. Add the next question: "Available quantity?".
8. Select "Number" from the Answer Type drop-down.
9. Add the next question: "Price?".
10. Select "Number" from the Answer Type drop-down.
11. Click "Save". Your actions should look like this:

Action	Answer Type	Required
Is the SKU available at the location?	Selection edit	<input type="checkbox"/>
Available quantity?	Number	<input type="checkbox"/>
Price?	Number	<input type="checkbox"/>

Step 4 - Schedule Visits and Tasks

Option 1 - Schedule on VisitBasis Office App:

How to add and plan Visits on **User Schedule** screen:

1. Select date and user, click on "Add Visits", select locations, click on "Add Visits".
2. Select the Visits, click on "Add Visits or Tasks" -> "Add Task Template".
3. Select the Sample MSL Task we just created, and click on "Add Tasks".

The screenshot displays the VisitBasis Office App interface. At the top, there is a navigation bar with tabs for Visits, Reports, Locations, Task Templates, Products, and Users. Below this is a secondary navigation bar with options like Dashboard, User Schedule, Schedule by Location, and Visit Calendar. The main interface is divided into three sections:

- Left Panel:** A list of users with columns for User, Teams, Visits, and Tasks. The user 'Carolina' is selected, showing 0 of 6 visits.
- Center Panel:** A table of tasks with columns for Location / Task, Estimated, and Status. Several tasks are listed, including 'publix - p10' through 'publix - p19'. The 'Add Visits or Tasks' button is visible at the top of this panel.
- Right Panel:** An 'Add Task Template' panel with a search bar containing 'msl'. Below the search bar is a table of tasks with columns for Select Tasks and Division. The 'Sample MSL Task' is selected, and the 'Add Tasks' button is visible at the bottom.

How to add and plan Visits on **Schedule by Location** Screen:

1. Click on the "+" button.
2. Select one or more locations. Click "Next".
3. Select one or more dates. Click "Next".
4. Select one or more tasks. Click "Create visits and tasks".

You might also choose to **schedule and plan visits and tasks in bulk** by importing a CSV or TXT Excel or Google sheets file. Your table should look like this:

locationCode	nickname	taskTemplate	visitDate
bv11	Anna	Audit - Easter Display	20171002
bv9	Anna	Audit - Easter Display	20171002
bv7	Anna	Audit - Easter Display	20171002
bv14	Michael	Audit - Easter Display	20171002
bv14	Michael	Planogram check	20171023
t6	Carolina	Audit - Easter Display	20171002
t6	Carolina	Planogram check	20171002

The visitDate field should always be in YYYYMMDD format.

To import the file:

1. Go to Settings -> Import Data, choose Visit/Task schedule from the drop-down, and click on Choose File.
2. Select your file, then we follow the importing steps.
3. Select "insert new data" in step 2.
4. Click on "Ok, Import it!" in step 3.

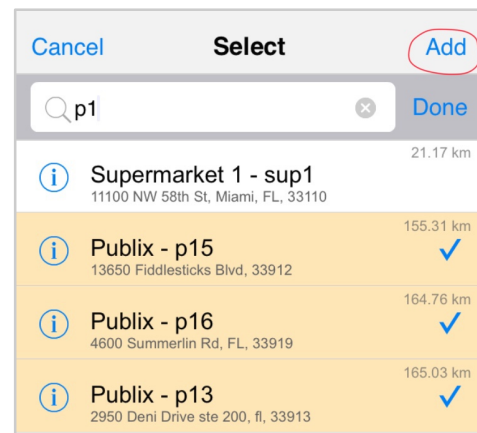
OR

Option 2 - Users schedule their own visits and tasks on the VisitBasis Mobile App

Note: As long as the "Field reps can schedule this task" option is checked for the task template, mobile app users will be able to add the task themselves to the visits. Field reps can schedule this task

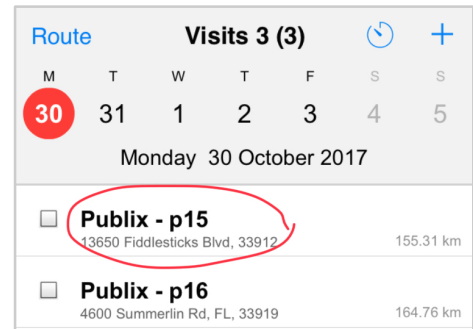
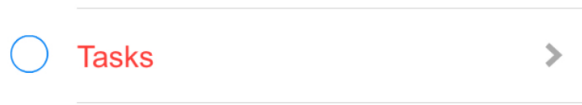
Adding visits:

1. On the Visits screen, select a date by clicking on the date scroll.
2. Click on the "+" on the top-right corner.
3. Select the location or locations to be visited and click on Add.

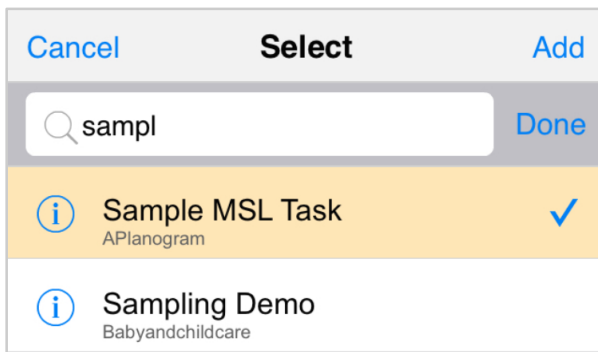


Adding tasks to each visit:

1. On the Visits screen, click on the visit to select it.
2. Click on "tasks".



3. Click on the top-right "+".
4. Find and select the tasks you want to add.
5. Click on the top-right "Add".



TIP: You can configure locations on the Office App so certain **tasks are pre-selected** when the mobile users choose to add tasks. This is especially useful if your reps have mandatory tasks to perform at every location they visit. To do so:

1. On the Location window, choose to add a property on the Properties box.
2. Add a property with the name "task_list" and copy/paste the value from the appropriate task tile in the Task Template window.
3. Save.

Properties	Name	Value
	task_list	Sample MSL Task

You can have **more than one** pre-selected task by separating task titles with commas, for instance:

Sample MSL Task,Audit - Cleaners

To input this information in bulk, for several locations at once, you can import a location properties table similar to the one outlined in Step 2 of this document.

Step 5 - Performing Planogram Compliance Tasks

On VisitBasis Mobile App Visits screen:

1. Select visit.
2. Click on "tasks".
3. Click on the task to be performed.
4. On the Task Summary window, click on "view task".
5. Choose "Action" view or "Item" view.

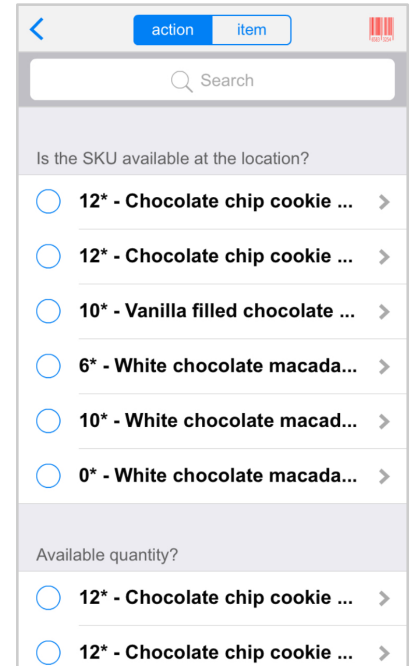
a. Action view:

Groups products by action (question).

(*) indicates must-stock-list (MSL) item.

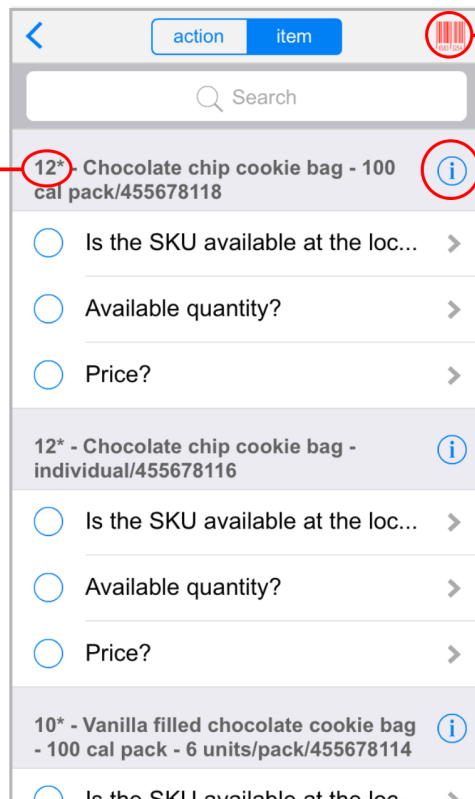
(number) indicates recommended quantity.

Actions on items with (*) must be answered before closing visits.



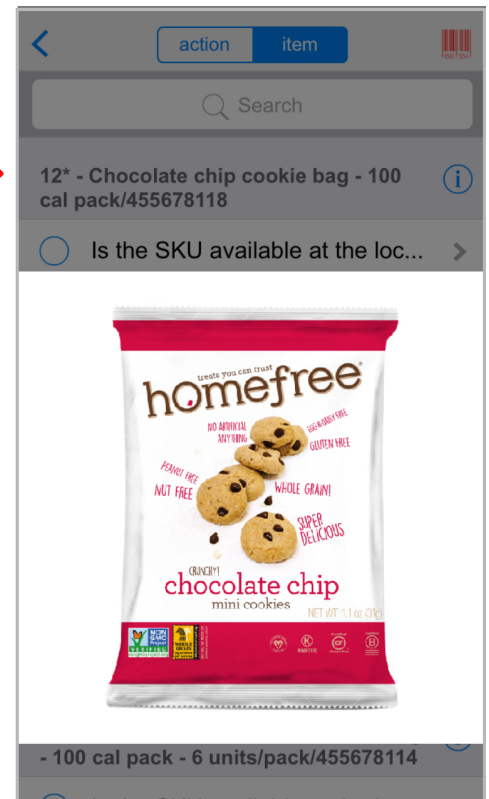
b. Item view:

Indicates MSL item (*) and recommended quantity (number). Must answer actions on MSL items before closing visit.

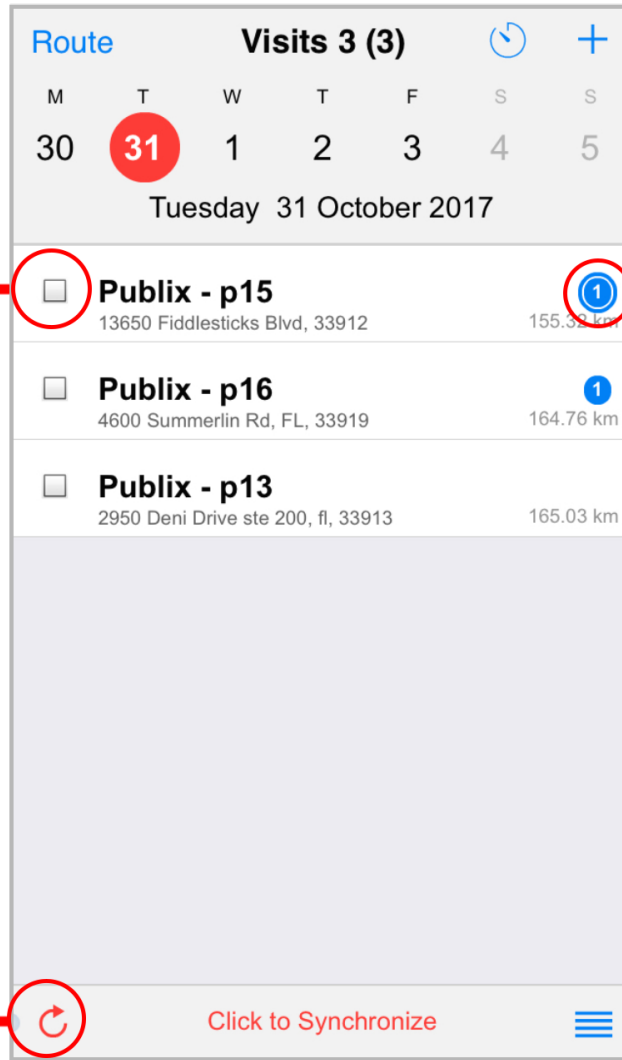


search by barcode (scan)

One-touch product photo view



6. Perform (answer) the actions on the task for all the products in the location's MSL.
7. Go back to the Visits (schedule) screen.
8. Verify that there are no pending tasks for the location by looking for the "full circle" around the number of tasks for the visit.
9. Synchronize VisitBasis.
10. Check the visit box.
11. Click on "Close" to close the visit.



Check box and then click "Close" to close the visit. No more changes can be made after visit has been closed.

Full circle around number of tasks indicates all tasks have been completed. **Visit is ready to close!**

Click to synchronize

Step 6 - Reporting on Planogram Compliance Tasks

On VisitBasis, there are 3 standard reports that work well with Planogram compliance tasks: Task (item/action), Task (action) or Simple Views - Task Answers.

To run reports on the VisitBasis Reports tab:

1. Choose report type.
2. Choose start and end date.
3. Click on "Run Report".

The screenshot shows the VisitBasis Reports interface. The 'Reports' tab is selected, and the 'Closed Visits' report type is chosen. A date filter is applied for 'visit date' from 09/01/2016 to 02/22/2017. The 'Run Report' button is highlighted. The table below shows the resulting data:

row	visit date	username	location	address	total tasks	completed tasks	start time	end time	proximity (m)
1	2016-09-06	Carolina	Aventura ...	21265 Bis...	1	0			
2	2016-09-06	Carolina	Boot Ranc...	900 E Lak...	1	1	11:35:22	11:36:01	325131
3	2016-09-06	Carolina	Altamonte...	886 W Sta...	2	1	11:50:03	11:50:18	312141
4	2016-09-06	Carolina	Aventura ...	21265 Bis...	1	0			
5	2016-09-08	Carolina	Sedano's	17171 Pin...	2	0			
6	2016-09-08	Carolina	Walgreens	18400 Pin...	2	0			
7	2016-09-08	Carolina	Whole Fo...	14956 Pin...	2	0			
8	2016-09-08	Carolina	CVS Phar...	17209 Pin...	2	2	08:39:19	08:41:17	64
9	2016-09-08	Carolina	Walgreens	15989 Pin...	2	0			
10	2016-09-08	Carolina	Publix	18341 Pin...	2	2	08:58:20	08:59:40	37
11	2016-09-08	Carolina	Publix	15729 Pin...	2	2	08:22:53	08:25:40	114
12	2016-09-09	Carolina	CVS	1001 n fe...	4	2	09:26:01	09:31:06	119
13	2016-09-13	Carolina	Bravo	10400 Nw...	2	1	09:50:11	09:50:18	22245
14	2016-09-13	Carolina	Bird Road...	7795 SW ...	1	1	09:41:06	09:42:21	31352
15	2016-09-13	Carolina	Boot Ranc...	900 E Lak...	1	1	11:38:19	11:46:15	325085
16	2016-09-15	Carolina	CVS	1001 n fe...	3	2	12:38:12	12:40:25	125
17	2016-09-20	Carolina	Bird Road...	7795 SW ...	1	1	10:25:37	10:26:22	31353
18	2016-09-22	Carolina	Aventura ...	21265 Bis...	1	1	14:59:33	15:01:37	28998
19	2016-09-23	Carolina	CVS	1001 n fe...	3	2	17:33:20	17:36:05	118

4. Once the data is retrieved, you can insert filters. Click on the Filters button and select the filters you want to add and click "Save".

The screenshot shows the Filters dialog box. The 'Filters' button is highlighted. The dialog box contains a search field and a list of filter options with checkboxes:

- visit date
- day visit id
- visit id
- team
- unplanned
- username
- user id
- location id
- location
- location code
- address
- start time

Buttons: Filters, Save, Cancel

Different planogram compliance check task view for the VisitBasis report types:

Task (item/action)

Sample MSL Task | Visit History | Analytics | Standard reports | Custom reports

1 filter(s) selected

visit date: 10/31/2017 - 10/31/2017
1 values from 2017-10-31 to 2017-10-31.

row	visit date	username	location	location code	(0* - W...	(10* - Va...	(10* - W...	(12* - C...	(12* - C...	(6* - W...	(0* - W...	(10* - V...	(10*
1	2017-10-31	Carolina	Publix	p15	0	10	10	12	11	8	No	Yes	Yes

One column per product/per action. One line per task/visit.

Task (action)

Sample MSL Task | Visit History | Analytics | Standard reports | Custom reports

1 filter(s) selected

visit date: 10/31/2017 - 10/31/2017
6 values from 2017-10-31 to 2017-10-31.

row	visit date	username	location	location code	item	product desc	barcode	Available...	Is the SKU available at the locati...	Price?
1	2017-10-31	Carolina	Publix	p15	6* - W...	100 cal pack	455678112	8	Yes	2.49
2	2017-10-31	Carolina	Publix	p15	10* - V...	6 units/pack	455678114	10	Yes	4.99
3	2017-10-31	Carolina	Publix	p15	12* - ...	100 cal pack	455678118	12	Yes	1.99
4	2017-10-31	Carolina	Publix	p15	12* - ...	individual	455678116	11	Yes	3.49
5	2017-10-31	Carolina	Publix	p15	0* - W...	individual	455678120	0	No	0
6	2017-10-31	Carolina	Publix	p15	10* - ...	6 units/pack	455678111	10	Yes	5.49

Product/task (lines) X Actions (columns).

Simple Views - Task Answers

Task Answers | Visit History | Analytics | Standard reports | Custom reports

2 filter(s) selected

task title: Search
1 distinct values containing *
 Sample MSL Task 18

visit date: 10/31/2017 - 10/31/2017
18 values from 2017-10-31 to 2017-10-31.

row	visit date	task title	item	task action	answer is complete	answer choice	answer number	answer t
1	2017-10-31	Sample MSL Task	10* - Vanilla filled choc...	Available qua...	Yes		10	
2	2017-10-31	Sample MSL Task	12* - Chocolate chip c...	Available qua...	Yes		12	
3	2017-10-31	Sample MSL Task	12* - Chocolate chip c...	Price?	Yes		3.49	
4	2017-10-31	Sample MSL Task	6* - White chocolate m...	Available qua...	Yes		8	
5	2017-10-31	Sample MSL Task	10* - Vanilla filled choc...	Price?	Yes		4.99	
6	2017-10-31	Sample MSL Task	6* - White chocolate m...	Price?	Yes		2.49	
7	2017-10-31	Sample MSL Task	10* - White chocolate ...	Is the SKU av...	Yes	Yes		
8	2017-10-31	Sample MSL Task	0* - White chocolate m...	Is the SKU av...	Yes	No		
9	2017-10-31	Sample MSL Task	10* - White chocolate ...	Available qua...	Yes		10	
10	2017-10-31	Sample MSL Task	0* - White chocolate m...	Available qua...	Yes		0	
11	2017-10-31	Sample MSL Task	10* - Vanilla filled choc...	Is the SKU av...	Yes	Yes		
12	2017-10-31	Sample MSL Task	0* - White chocolate m...	Price?	Yes		0	
13	2017-10-31	Sample MSL Task	12* - Chocolate chip c...	Price?	Yes		1.99	
14	2017-10-31	Sample MSL Task	12* - Chocolate chip c...	Is the SKU av...	Yes	Yes		
15	2017-10-31	Sample MSL Task	10* - White chocolate ...	Price?	Yes		5.49	
16	2017-10-31	Sample MSL Task	6* - White chocolate m...	Is the SKU av...	Yes	Yes		
17	2017-10-31	Sample MSL Task	12* - Chocolate chip c...	Available qua...	Yes		11	
18	2017-10-31	Sample MSL Task	12* - Chocolate chip c...	Is the SKU av...	Yes	Yes		

Filters | Run Report | 1 - 18 of 18 | Download | Table View | Photos | Copy To Excel

Action/product/task (lines).

When you reach a report format that fits your needs, you can bookmark it by clicking on the plus sign (3 on image on the next page) and naming it, then access this report template whenever needed by clicking on bookmarks and selecting it.



Now you can:

1. Select and apply additional filters.
2. Customize the report columns.
3. Create a bookmark for your favorite views.
4. Download or save data to Google Drive.
5. View only the photos within the report parameters you chose (5a) and then generate an HTML version of them (5b).
6. See and copy data to Excel.

The screenshot displays the VisitBasis Reports interface. At the top, there are navigation tabs for Visits, Reports, Locations, Task Templates, Products, and Users, along with a 'Billboard' button and a user profile for 'Carolina'. The main section is titled 'Closed Visits' and includes links for 'Visit History' and 'Analytics'. A 'Bookmarks' button is visible in the top right corner, labeled with a red '3'. On the left, there are filter sections for 'location' (with 2 distinct values: Bird Road Target and Boot Ranch Target) and 'team' (with 1 distinct value: Southwest). A date range filter is set from 09/01/2016 to 02/22/2017. The main table has columns for row, visit date, team, location, username, address, total tasks, completed tasks, start time, and end time. A red box labeled '7' highlights the first seven rows. A red box labeled '4' highlights the 'Download' button. A red box labeled '5a' highlights the 'Photos' button, and a red box labeled '6' highlights the 'Copy To Excel' button. A red box labeled '1' highlights the 'Filters' dropdown, and a red box labeled '2' highlights the 'Run Report' button. A modal window for a task is also visible, showing details for 'Publix/px33020'.

row	visit date	team	location	username	address	total tasks	completed tasks	start time	end time	photo
1	2016-09-06	Southwest	Boot Ranch...	Carolina	900 E Lak...	1	1	11:35:22	11:36:01	
2	2016-09-13	Southwest	Boot Ranch...	Carolina	900 E Lak...	1	1	11:38:19	11:46:15	
3	2016-09-13	Southwest	Bird Road...	Carolina	7795 SW ...	1	1	09:41:06	09:42:21	
4	2016-09-20	Southwest	Bird Road...	Carolina	7795 SW ...	1	1	10:25:37	10:26:22	
5	2016-09-28	Southwest	Bird Road...	Carolina	7795 SW ...	1	1	09:38:27	09:39:21	
6	2016-10-03	Southwest	Bird Road...	Carolina	7795 SW ...	2	0			
7	2016-10-04	Southwest	Boot Ranch...	Carolina	900 E Lak...	2	0			
8	2016-11-02	Southwest	Bird Road...	Carolina	7795 SW ...	2	2	13:41:11	13:43:58	
9	2016-11-03	Southwest	Bird Road...	Carolina	7795 SW ...	2	2	12:24:32	20:07:33	
10	2016-11-09	Southwest	Bird Road...	Carolina	7795 SW ...	1	1	10:36:51	10:37:17	
11	2016-11-21	Southwest	Bird Road...	Carolina	7795 SW ...	1	1	09:10:26	09:10:54	
12	2016-12-06	Southwest	Bird Road...	Carolina	7795 SW ...	1	1	12:21:18	12:21:57	
13	2016-12-07	Southwest	Bird Road...	Carolina	7795 SW ...	1	1	09:18:13	09:18:44	
14	2016-12-08	Southwest	Bird Road...	Carolina	7795 SW ...	1	1	10:12:41	10:13:07	
15	2016-12-08	Southwest	Bird Road...	Carolina	7795 SW ...	2	2	14:33:31	14:37:57	
16	2016-12-14	Southwest	Bird Road...	Carolina	7795 SW ...	1	1	12:16:19	12:16:55	
17	2016-12-16	Southwest	Bird Road...	Carolina	7795 SW ...	1	1	16:41:18	16:42:09	
18	2016-12-19	Southwest	Bird Road...	Carolina	7795 SW ...	1	1	11:13:46	11:14:20	
19	2017-01-04	Southwest	Bird Road...	Carolina	7795 SW ...	2	2	10:58:57	10:59:32	

If you have any questions, don't hesitate in contacting us at support@visitbasis.com