VISITBASIS

Retail Audit Software
Traditional Retail Audit Management

Main challenge: dealing with many people, at many different locations, bringing in a LOT of paper-based information on sometimes many products.

Problems with paper-based retail audits:

- Fraudulent check-ins
- Data lost in transcription
- Delayed response on mission-critical items, such as out-of-stocks
- Limited amount of information collected – no visuals
- Difficult to report on unexpected situations – “if it’s not in the checklist, it doesn’t exist”
Introducing VisitBasis

Cloud-based, complete retail audit software solution designed to build, schedule and monitor field team activities in real time.

For businesses that rely on field reps, merchandisers or store auditors.
## Paper-based vs. Mobile Retail Audits

<table>
<thead>
<tr>
<th>Data capture</th>
<th>Paper</th>
<th>Mobile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who knows?</td>
<td>Clumsy, wasteful, and flat-out inefficient. Limited to what fits on a form.</td>
<td>Capture photos, signatures and more. Office has immediate access to captured information, and there is no paper involved.</td>
</tr>
</tbody>
</table>

| Where are your reps/auditors and what are they doing?                        | Who knows?                                                           | GPS tracks and monitors all field activity in real time. Managers can know for sure that the audits were performed at the correct point-of-sale (PoS). |

| Reports                                                                      | Only after all the individual store reports have been transcribed.  | Managers can generate up-to-the minute reports with detailed information, speeding up decision-making. |
# Paper-based vs. Mobile Retail Audits

<table>
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<th>Notifications of mission-critical events</th>
<th>Paper</th>
<th>Mobile</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Inexistent. Reps must call or situation might linger on until someone notices it on a report.</td>
<td>Managers can setup automatic notifications of events related to certain tasks, products or locations.</td>
</tr>
</tbody>
</table>

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<th>Store rounds</th>
<th>Paper</th>
<th>Mobile</th>
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<td></td>
<td>Random, dependent on rep’s judgement or manager’s order.</td>
<td>Optimizes routes, calculating the shortest round for the day starting from current location.</td>
</tr>
</tbody>
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<th>Unplanned situations</th>
<th>Paper</th>
<th>Mobile</th>
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<td>Not on standard forms or checklists.</td>
<td>Managers can setup tasks for specific situations such as “damaged product”, “out-of-stock”, etc., in order to trigger notifications.</td>
</tr>
</tbody>
</table>
Retail Audit Applications

Customize in-store activities according to your business needs.

- Verify **compliance with sales, marketing, corporate, and branding strategies:**
  - Product pricing and placement
  - Sets and resets
  - Planogram and promotions
  - Visual merchandising
  - Seasonal displays
  - Safety and personnel training

- **Tracking and monitoring**
  - On-shelf availability
  - Orders and returns
  - Competitor prices and promotions

- In-store **surveys**
Unique Benefits

• Real-time activity tracking and reporting, filtering all the information that comes from the field.

• Every mobile activity is GPS and time-stamped.

• Bulk visit scheduling and planning.

• Visit route optimization both on app and on management interface.

• True offline/online capabilities: Mobile users are able to work offline and synchronize once online.
Unique Benefits

• Straightforward **VisitBasis Analytics** graphic reporting tool.

• **Integration** with outside scheduling, chat and querying applications.

• Easily export/import data to/from spreadsheet software.

• Easily add/remove reps to your subscription plan.

• **BYOD** (Bring Your Own Device): your auditors can use their own smartphones or tablets – no need to invest in new hardware.

Free iOS and Android App.
VisitBasis Office App

- Manage locations, products and users
- Assign territories through easy mapping
- Plan visits for reps - advanced task template building
- Schedule visits and tasks individually or in bulk
- Monitor - track user activities live on the map
- Report - advanced tools allow to extract data in many ways

VisitBasis Mobile App

- Android and iOS
- Users can install and use app in as many devices necessary, and at the same time
- Online and offline mobile data capturing
- Information on customers, products and visits is readily available
- On-the-go scheduling and planning, as well as route optimization
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