SMARTLY
MANUAL FOR STORES

LEONARDO

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SMARTLY

Smartly is a digital workplace aimed to increase the efficiency of the stores management, through task assigned to stores, picture management and digitalized store visit process and massive communications (news).

The application is made of three main modules:

• Store Visit

• Picture Management

• Communication module

If you already have Smartly, you don't need to download any other app.

PLATFORM NAVIGATION

ACCESSING TO THE NEW SMARTLY

Open the Smartly app and click on "Go to new Smartly"
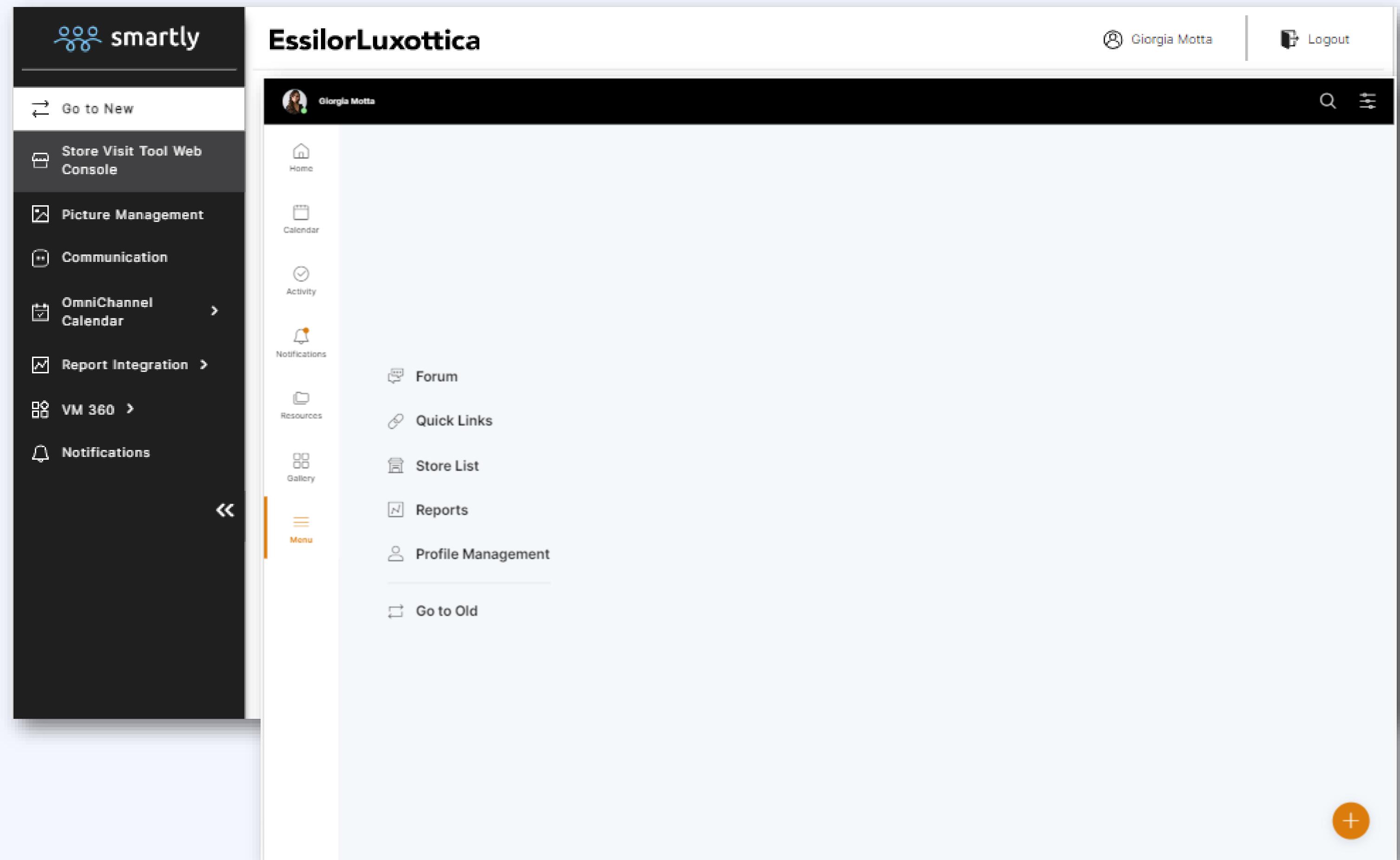
HOMEPAGE

In the entry page you can find the News feed, your focus activities to be done for the day and a list of the other activities. In the sidebar you can access the other sections of the tool. In the header you can access the Profile, the search bar, and the filter button.

1 The Header let you access the Profile and its settings, Search bar, filters

2 Your focus activities for today shows mandatory and urgent activities to be done, according to:
1. Missing days to expiration
2. If point 1 is the same, priority on the project (red flag)
3. If point 2 is the same, hierarchy of the creator depending on their job role
4. If point 3 is the same, alphabetical order

3 Ribbon to filter the latest news with the option to select Current Week, Last Week, Current Month and All's News

4 The Newsfeed shows the latest news published. Click on them to open and mark as read if required. You can also leave comments and like. The news is sorted in descending order based on the start date; you will see on the top the news with the latest start date. If the start dates are the same, they are sorted based on the creation date.
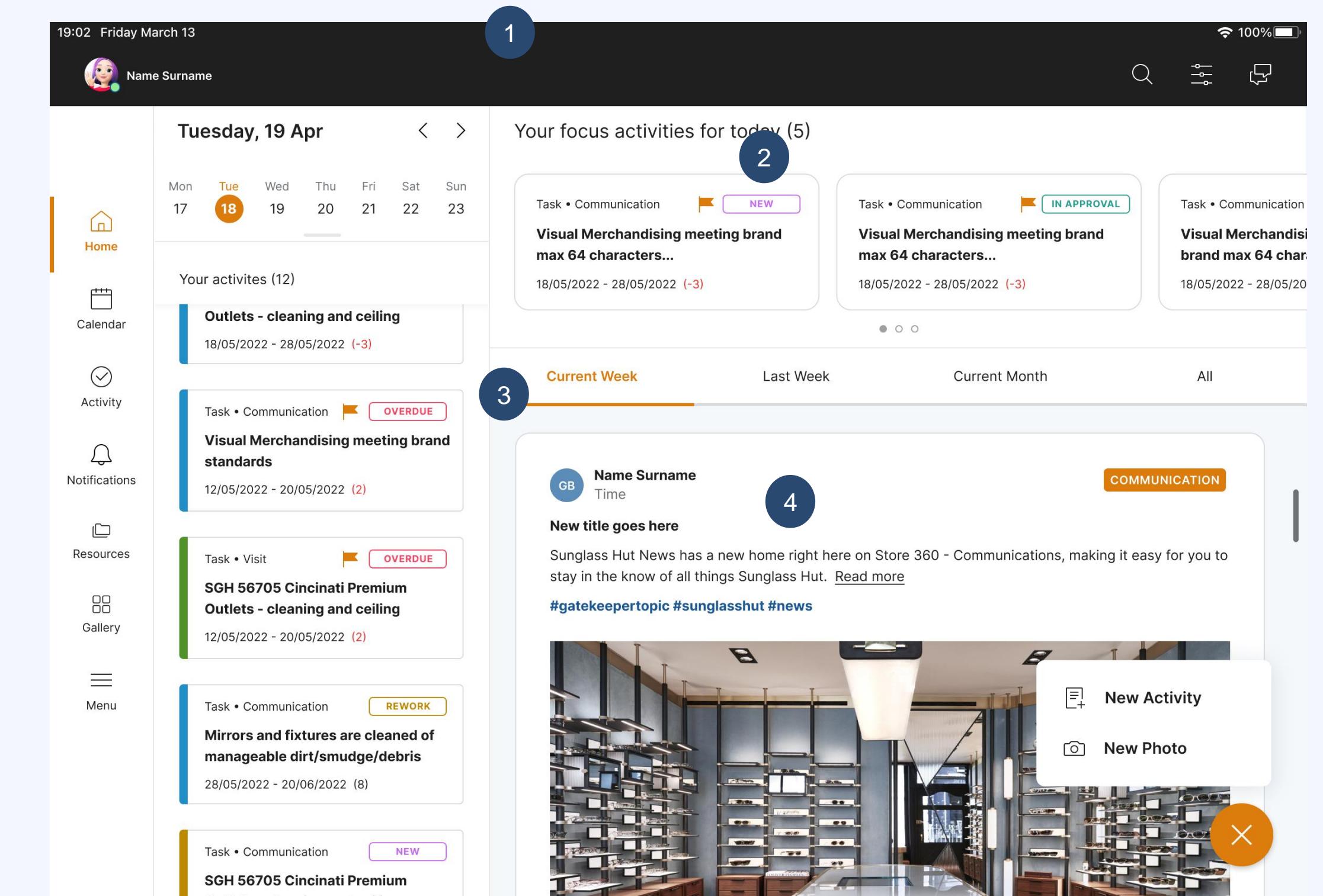
HOMEPAGE

5 The Calendar will show you a preview of the current week. You can select the arrow to go to a prior or future week. The day selected in the calendar, reflect the activities in the list below that belongs to that day

6 «Your activities» shows the projects coming from the "TO ME" tab of the Activities section that refer to the selected day in the calendar

7 Here you can see the start date and the end date. In brackets, there is the number of days left to complete the project, which become red when the project is overdue or nearly overdue. The orange flag means this project is urgent.

8 The Sidebar lists the different sections of smartly that you can navigate to

LEONARDO

CALENDAR

1 The **Filter by module** let you filter the visibility of the modules in the calendar

2 Click to change the view between monthly, weekly or daily view

3 Click on the arrows to move between months, weeks or days according to the selected calendar

4 In the middle of the screen, the tasks are listed with tasks without timing at the top, while tasks with a specified time will be listed below.
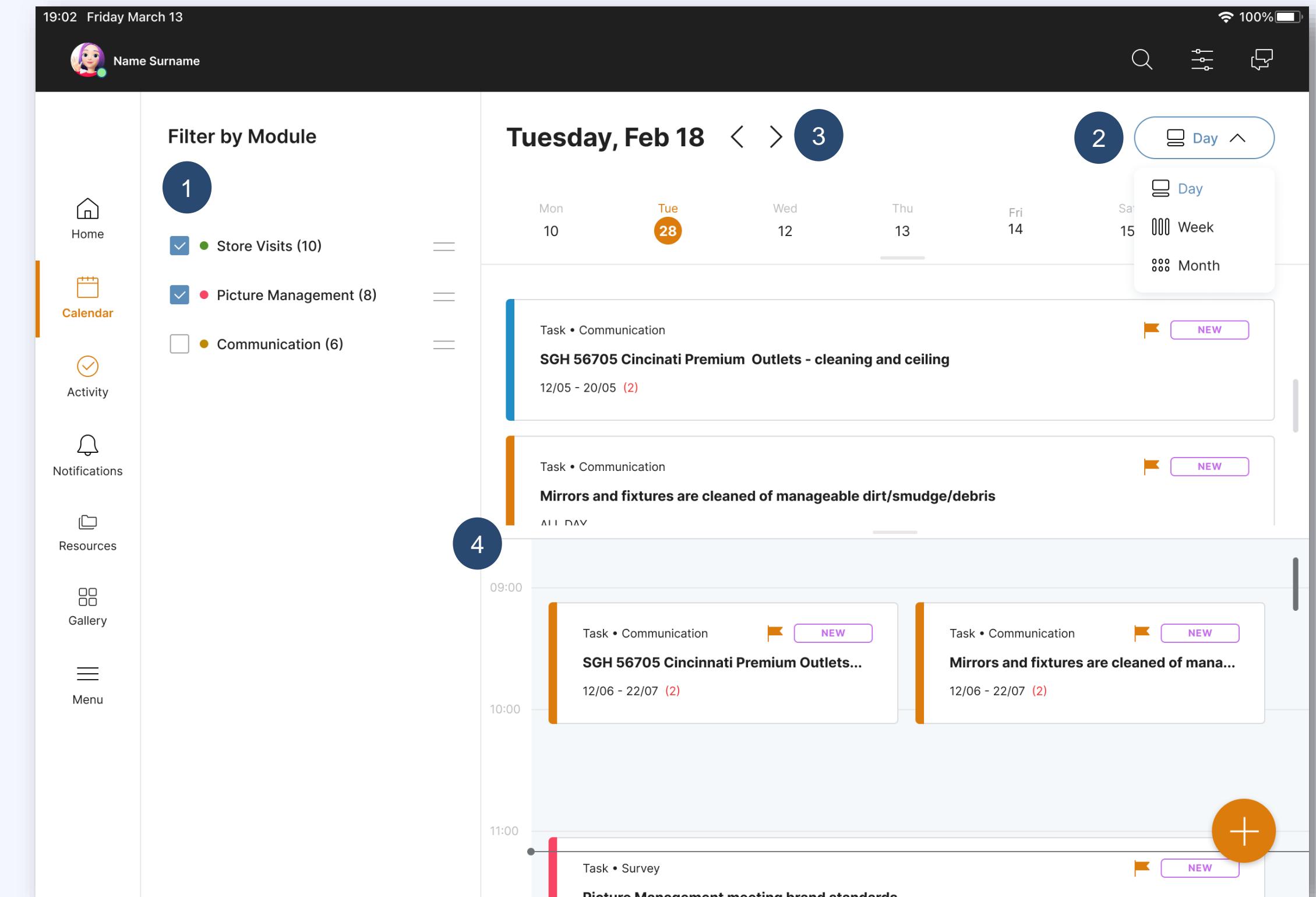
ACTIVITY

This section shows the list of activities and their key information. There are three different types of activity: News, Tasks and Visit.

1 The **TO ME** tab shows the list of all the activities to be executed

2 The **FROM ME** tab shows the list of all the activities assigned from me

3 The **OTHERS** tab shows the list of all the activities created by other users related to the own cone of visibility

4 Here you can find the list of activities, each activity status has its own color. You can see the start date, the end date which includes in brackets the number of days left to complete the project (which become red when the project is overdue or nearly overdue). The flag icon means this project is urgent. Click on the star to add the project to your favorites

5 Use **PLUS BUTTON** to create a new activity

6 Click on the three dots to show "Unread" messages and "Activities with new messages"

19:02 Friday March 13 · 100%

Name Surname

Activities

All Activities

1 ↓ To me   **2** ↑ From me   **3** Others

4

1-50 of 1023   50 ⌄

Project name	Status	Type	Module	Start date	End date	Favorite	Priority
Visual Merchandising meeting brand standards title goes here	IN PROGRESS	TASK	Store Visit	10/10/2022	10/10/2022 ✏	☆	⚑
Mirrors and fixtures are cleaned of manageable dirt/smudge/debris	CANCELLED	VISIT	Store Visit	10/10/2022	10/10/2022 ✏	★	⚑
Visual Merchandising meeting brand standards	OVERDUE	TASK	Communi...	10/10/2022	10/10/2022 (-1)	☆	⚑
Visual Merchandising meeting brand standards title goes here	CLOSED	VISIT	Store Visit	10/10/2022	10/10/2022 (5)	☆	⚑
Mirrors and fixtures are cleaned of manageable dirt/smudge/debris	IN PROGRESS	VISIT	Store Visit	10/10/2022	10/10/2022	★	⚑

Home
Calendar
Activity
Notifications
Resources
Gallery
Menu

5 +

6 ⋮

NOTIFICATION

The Notifications shows the list of notifications you received. There are four different types of notification: Reminder, Reaction, New action, New update. Notifications will come through the notification center while using the app. They will appear as pop-ups while browsing the tool and in the locked screen, the timing varies according to macroregion:

Macroregion	Notification timings	Time zone
EMEA	10:30 am + 5:00 pm	CET (Rome)
US	2:00 pm + 6:00 pm	EST (New York)
APAC	9:00 am + 3:00 pm	GMT+11 (Sydney)

1 MAIN SETTINGS DEFAULT
- **Show Unread Only OFF** (shows read and unread notifications)
- **Show High Priority only OFF** (shows high priority or normal notifications)

By checking the box, you alter the view of notifications based on setting.

You can click on Mark all as read to mark all notifications as read.

2 The Sort by can filter for notification types

3 LIST OF NOTIFICATION
- Scroll to see all the list of notifications received
- By clicking on a notification, it is possible to open the related activity

4 Swipe to mark a notification as read or to set a notification as a priority
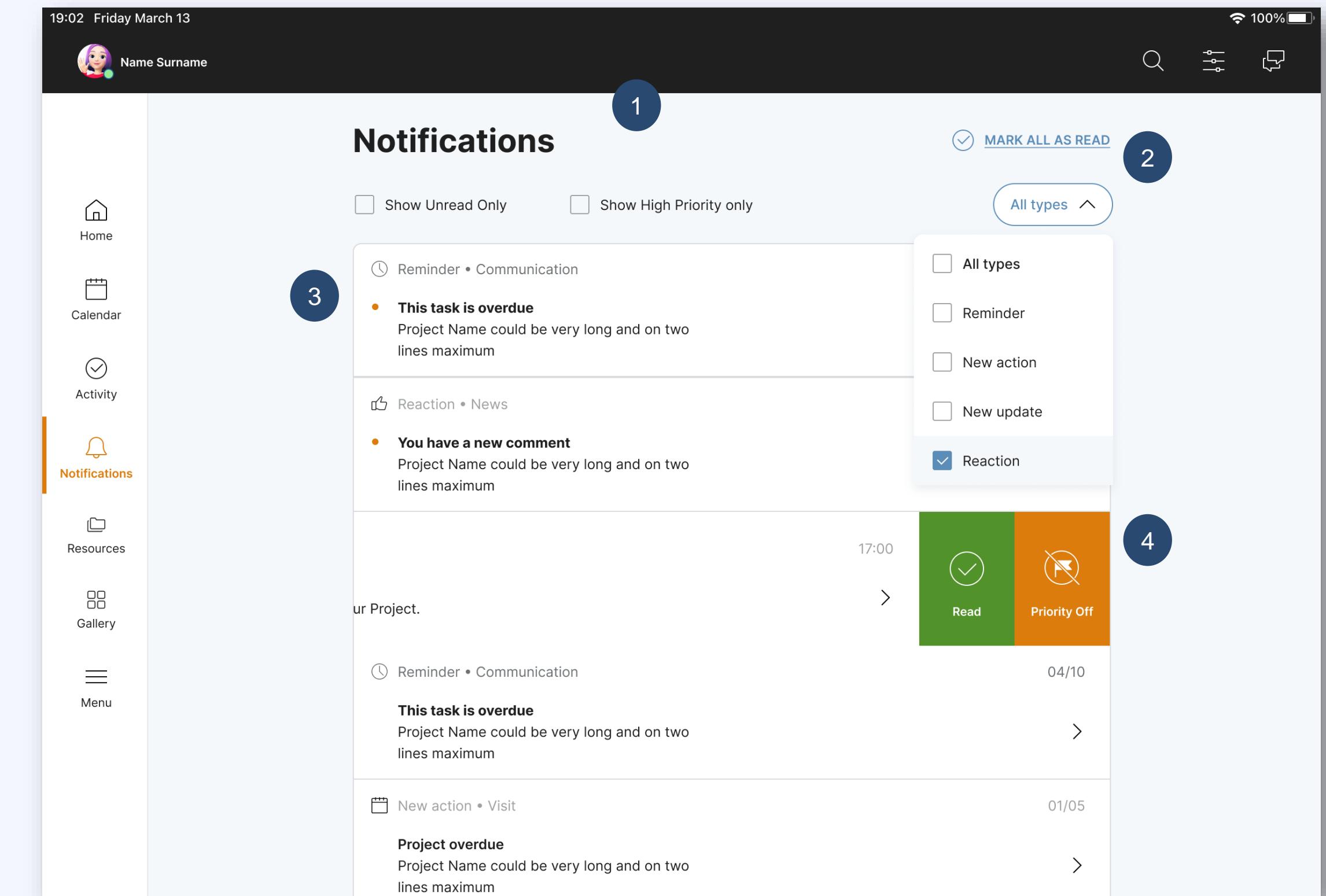
RESOURCES

The resources section lets you locate Documents and Forms inside their respective Folders

1 From the side bar, click on «Resources»

2 Here is the list of documents in the selected folder. Documents includes list of files (pdf. ,excel. , ppt. …) and articles

3 Once you switch on the toggle of Editing Mode, you can: Add to favourite; Move documents through folders; Delete; Download

**4** It is possible to sort by the documents in alphabetical order or on the basis of the last edit
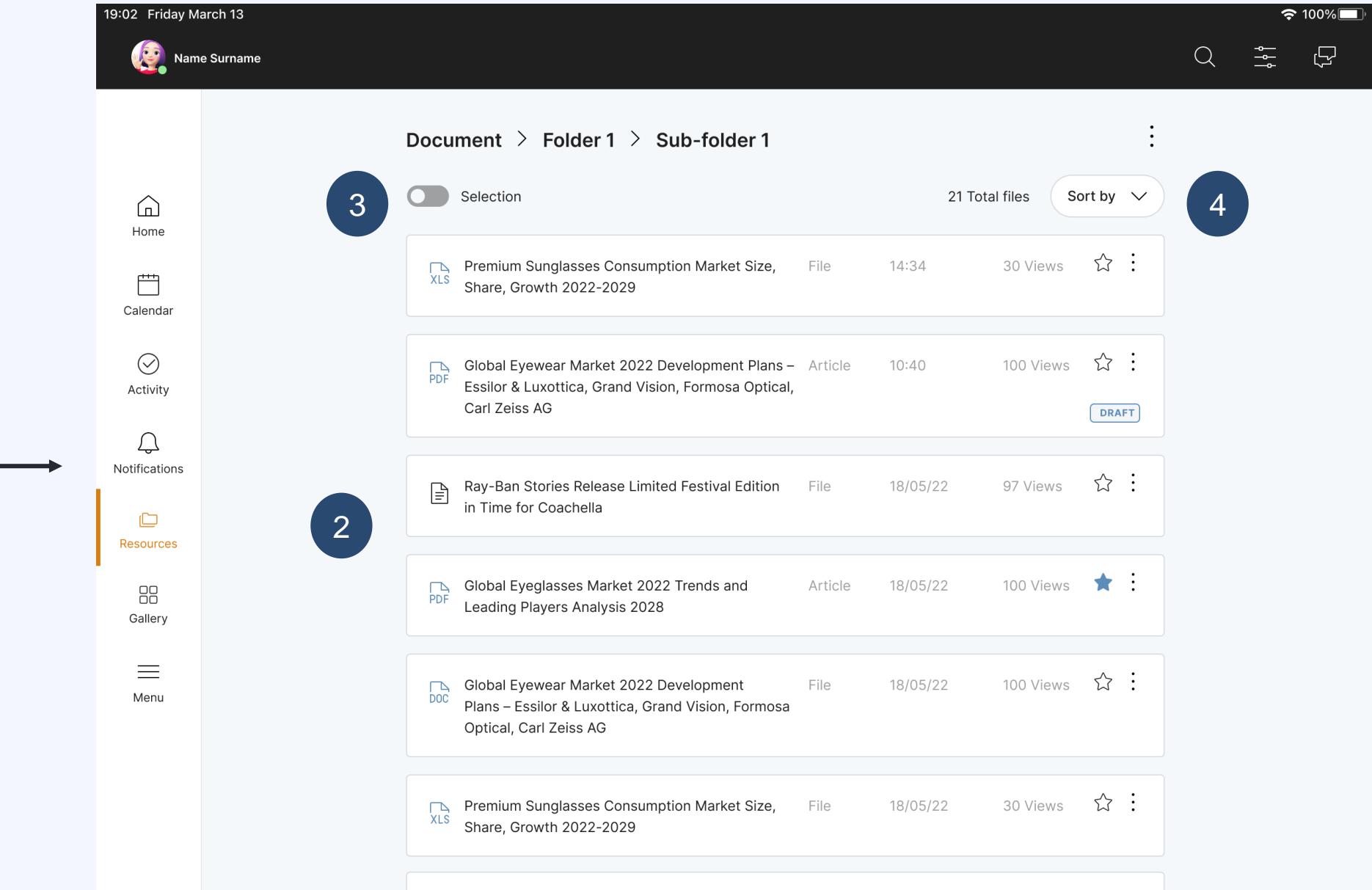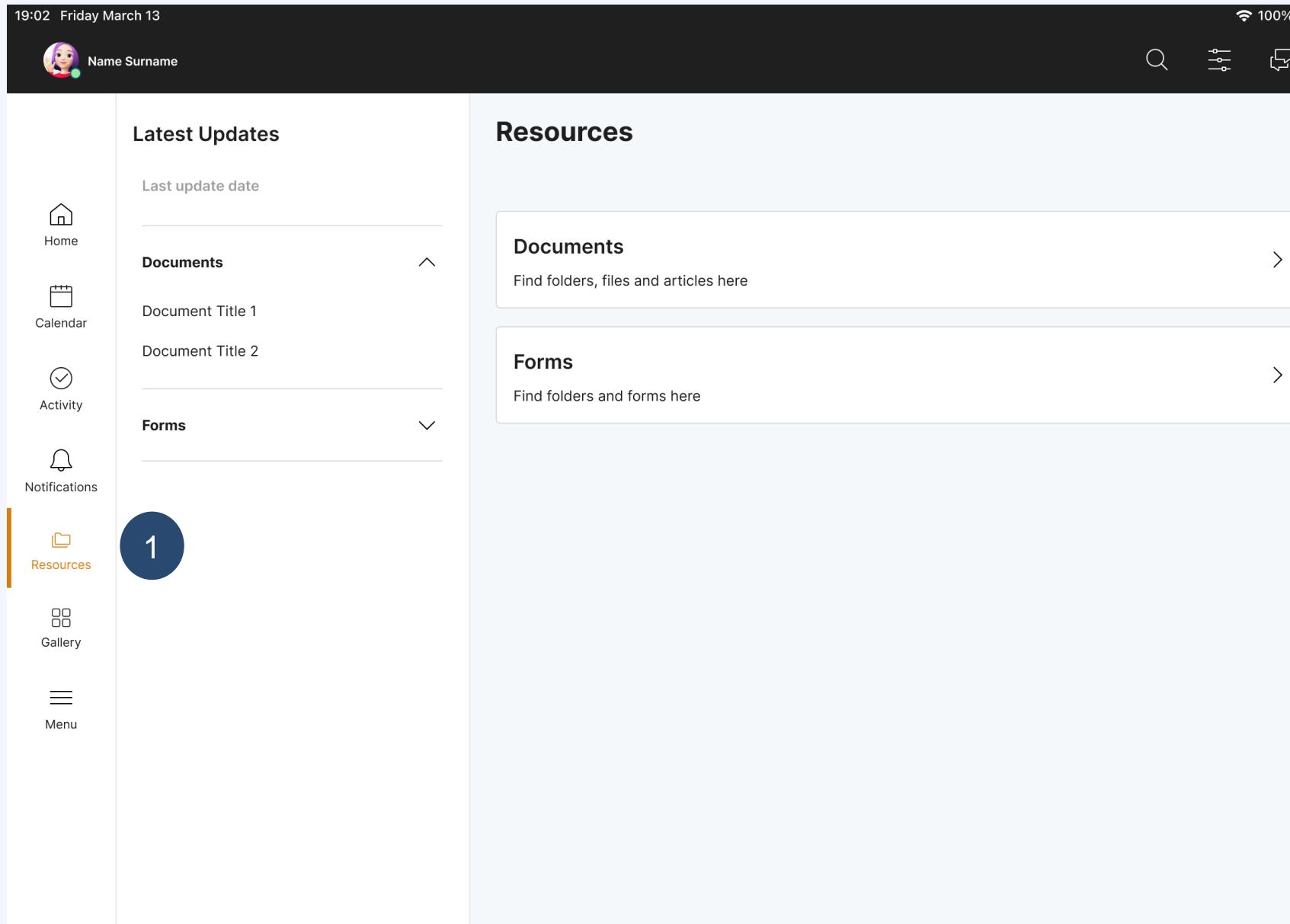
GALLERY - OVERVIEW

The Gallery section lets you locate images inside their respective albums, there are three tabs inside: Albums, Projects and Stores

From the side bar, click on «Gallery»

1 In the **Albums** tab, each user will have the possibility to create his/her own albums through some settings

2 In the tab **Projects** and **Stores,** Pictures are organized in folders by project or by store

3 By selecting a project, you will visualize all the pictures related to a specific project (splitted by store)

4 **Click on "All types",** to filter by projects' types

5 **Sort by,** to sort the folders alphabetically or based on the last edit
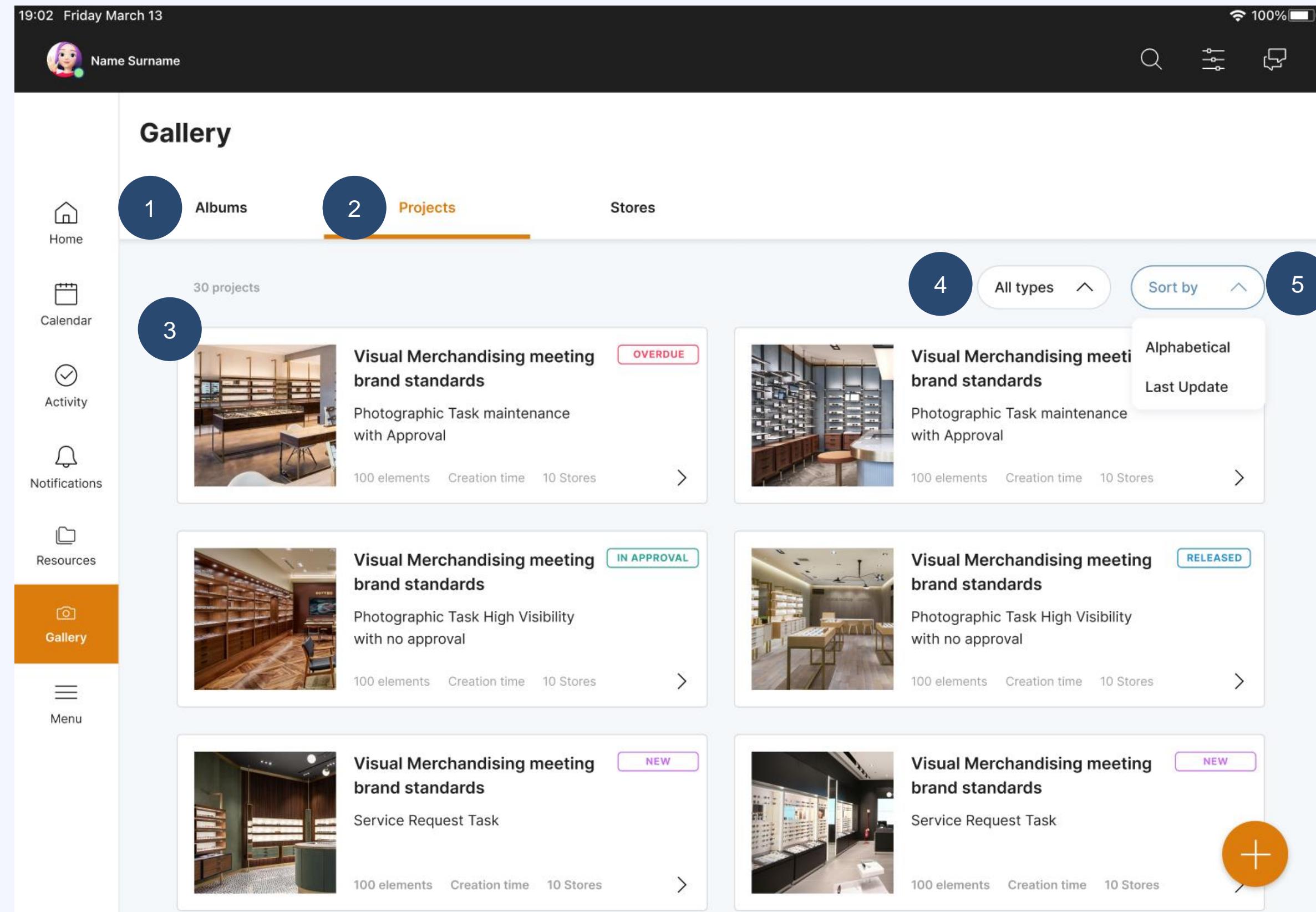
SEARCH

The Search bar allows to search elements in all the sections. From the header, click on «Search».

1 Type in the name of the project, document, form (…) you are looking for. You can also search inside texts (documents, files, projects, messages, attachments..) to make the search easier.

2 Quick advanced filtering based on the content of the search ouput

3 Here you can find the results of the search bar divided by sections.
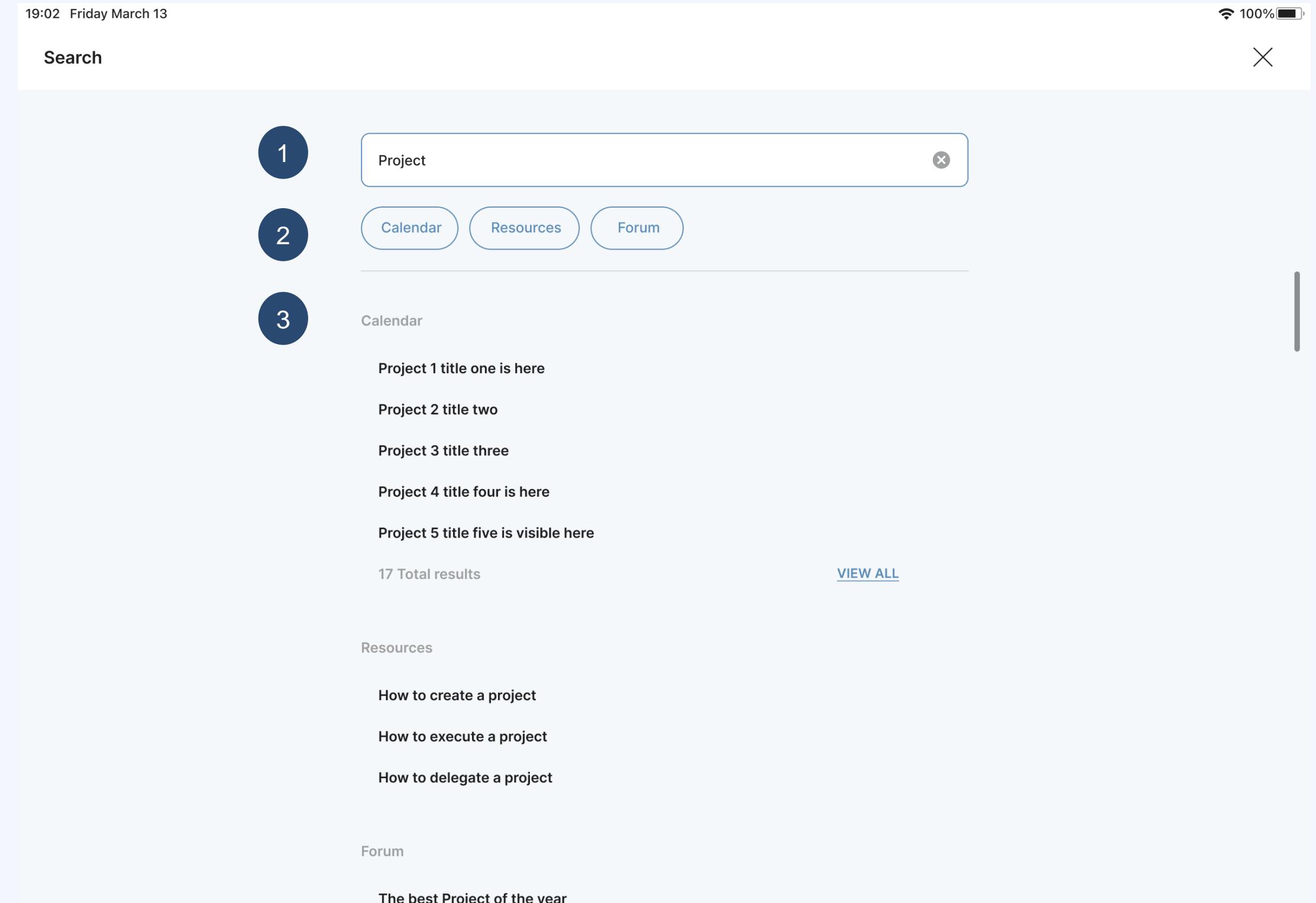
19:02 Friday March 13   100%

Search   ✕

1 Project   ⊗

2 Calendar   Resources   Forum

3 Calendar

Project 1 title one is here

Project 2 title two

Project 3 title three

Project 4 title four is here

Project 5 title five is visible here

17 Total results   VIEW ALL

Resources

How to create a project

How to execute a project

How to delegate a project

Forum

The best Project of the year

FILTER

Use the filter to refine your search and to filter cross platform for a specific store, project, status and so on. Filters simplify the navigation, letting you filter only what you need.
From the header, click on «Filters».

1 Here you can see the active and saved filters, "original filter" means that there no filters saved yet

2 Three filters' categories: Project, Store specs, Time Frame. Inside those categories you can find many filters. The check mark in the category appears when you have filtered something inside

3 Saving Options:
- If you create a filter from scratch and click "Save" you can save it by writing the name of the filter. You can set your filter as default if you want. Once the user has saved the filter, click on Apply.

- If you modify the saved filter and click on "Save", the Saving option pop up opens with "Save as new" and "Update". Save as new is used to save another new filter, which does not overwrite the already saved filter. The Update option is used to update the old data.

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Filter   ✕

Active and Saved filters

| Original filter   **1**   ⌄ |

● Released ✕   ● Redo ✕   ● In Progress ✕
Activity - Communication ✕   News - Communi... ✕
Regional Manager ✕   Store Manager ✕   Region... ✕
Store associate ✕   Dept - Communication ✕   View all

🗑 CLEAR ALL FILTERS

Filter categories **2**

Project   ✓ >

Store specs   ✓ >

Time frame   >

SAVE   **3**   APPLY

Status	✓ ⌄
Project Type	✓ ⌄
Reference User	⌄
Job role	⌄
Department	⌄
Priority	⌄
Favourite	Show only Favorites (ON) ⬤
Overdue	Show only Overdue (ON) ⬤

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QUICK LINKS

Quick links give you and your stores easy access to useful websites

1 Click Menu and then click on the Quick Links icon

2 The list of quick links available to you will appear

3 Click on the arrow icon to access the desired website

4 Click on the three dots to share the link

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Name Surname

Quick Links

Home

Calendar

Activity

Notifications

Resources

Gallery

Menu

Quick links

5 topic subjects   Sort by

Link title 1
Short content description

Link title 2
Short content description

Link title 3
Short content description

Link title 4
Short content description

Link title 5
Short content description

Link title 5
Short content description

FORUM

1 Click Menu and then click on the Quick Links icon

2 You will see the list of open threads. Each thread have a set of topics
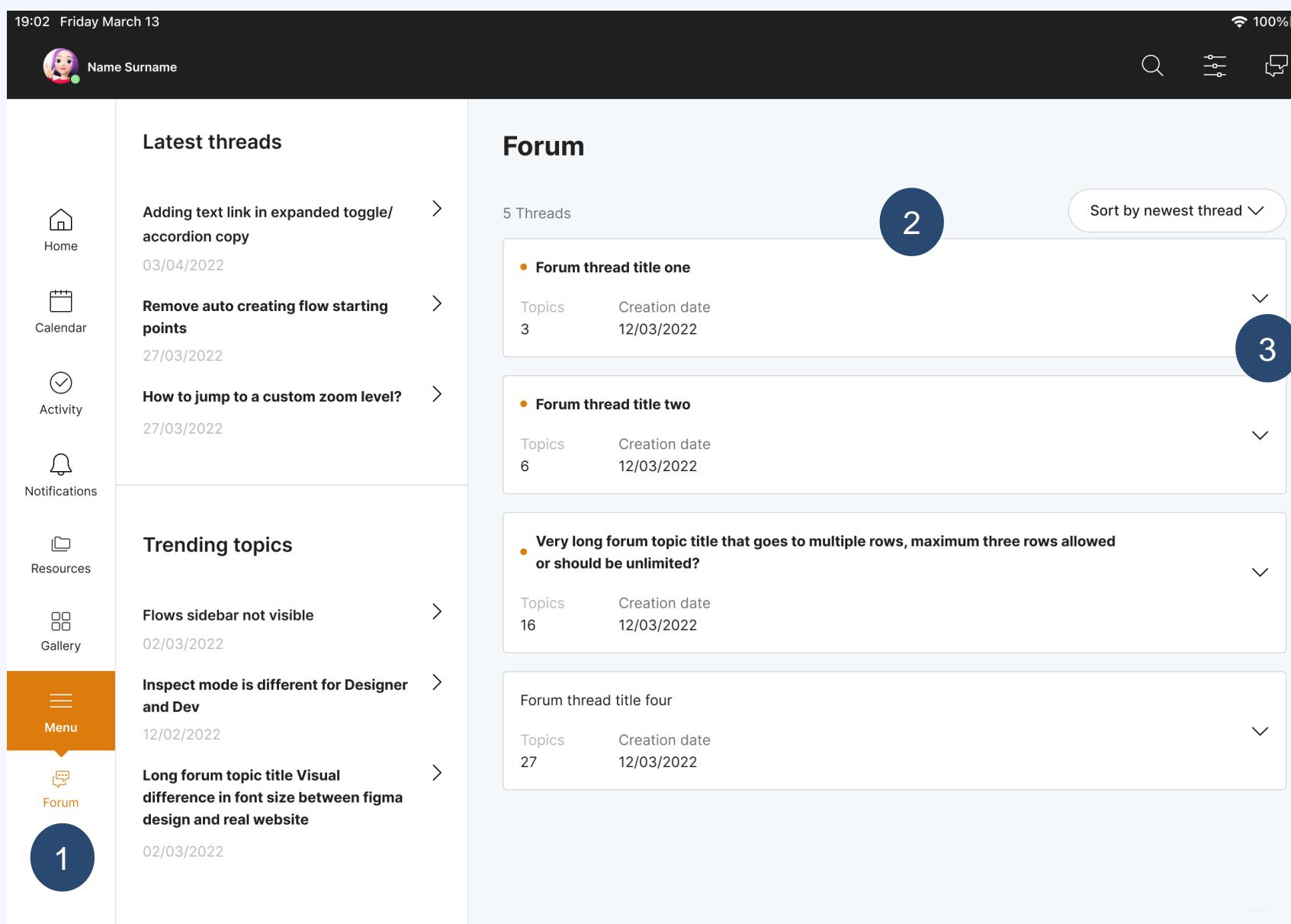
3 To add a message to a topic, click on the arrow. A list of the topics inside will appear

4 Once you click on the topic inside the thread, leave a message

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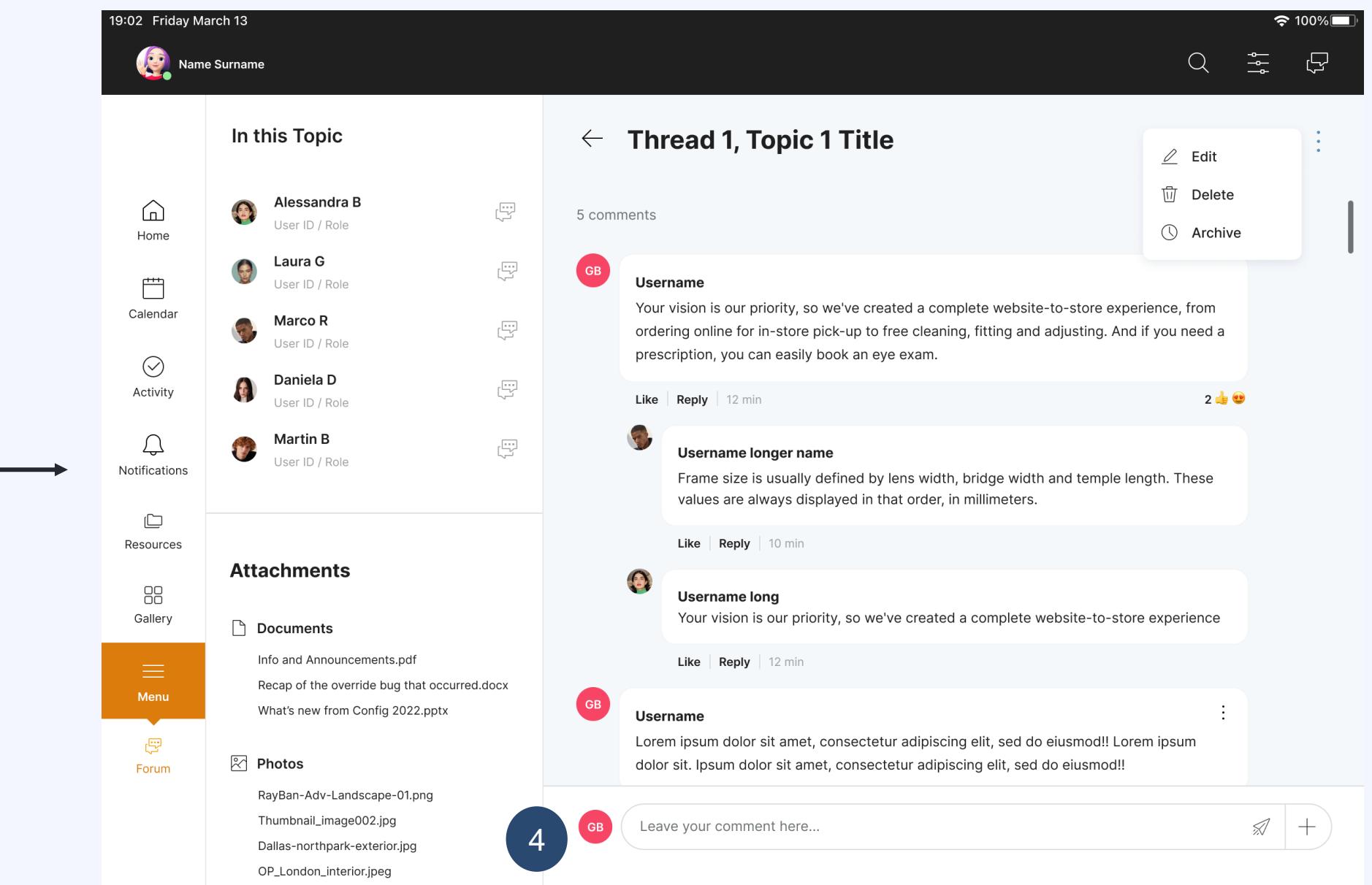
FORUM

1 To create a new Discussion, click on the plus button

2 Choose if you want to create a new thread or topic

3 If you create a new topic, choose the reference thread

4 Type in the name of the new Topic, the information and select the distribution

5 Click on save to proceed

PROFILE

In the Profile section you can find the main information about your profile and settings to handle

1 In the Personal Information you can edit the profile image and find info about the profile such as the user ID and Job Role

2 In the Module view settings you can see the visibility that you have for each module

3 In the Notifications visibility you can choose to switch off the toggle to do not see the pop-up notifications when browsing the tool or choose which type of them you want to receive.

4 In the Language settings you can set the preferred language. When you access for the first time, the default language will be English, click there to change it

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Name Surname

My Profile

Home

Calendar

Personal Information   **1**

Activity

Module view settings   **2**

Notification Visibility   **3**

Notifications

Language Setting   **4**
English

Resources

Gallery

Menu

App info
App version 1.0, 2022, etc

→ LOG OUT

Profile Image

Edit profile image

User ID
SilviaV

Name
Silvia

Surname
Villarini

App Profile
App Profile

Job Role
Job role goes here

Region / Country
Region Country

EDIT PROFILE

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STORE LIST

1 Click Menu and then click on the Store List icon

2 In the Map you can see the store selected from the list with the relative address

3 Click on the store to view the store details with opening hours, all the information related to the store and the global retail store dashboard
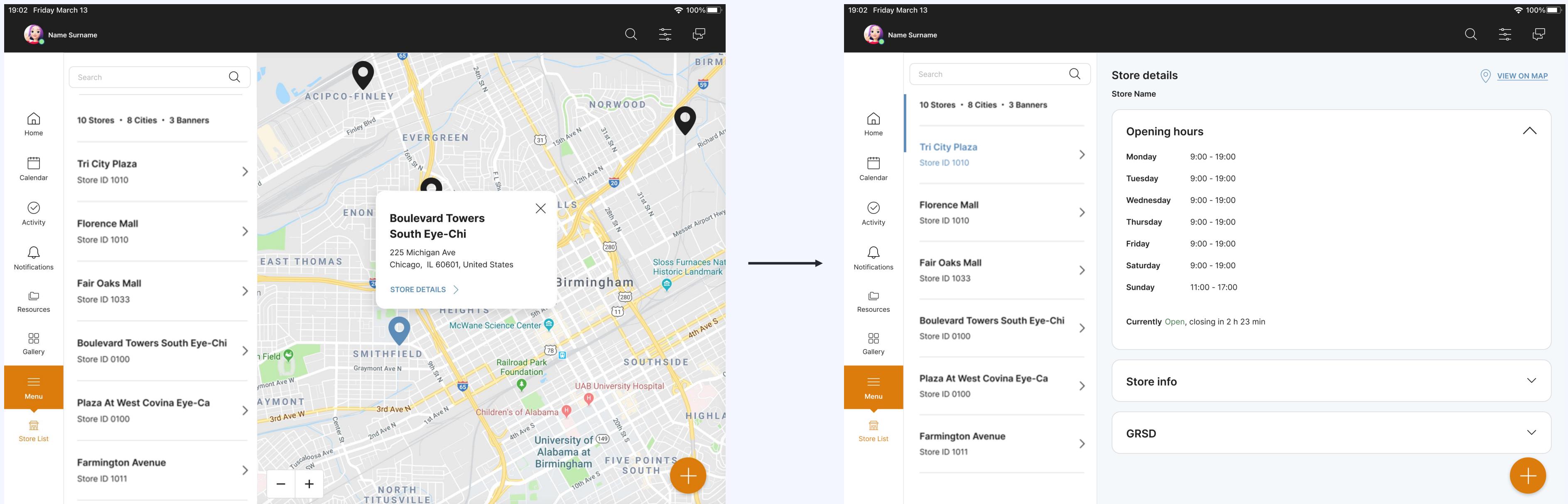
GLOBAL RETAIL STORE DASHBOARD - GRSD

1

This section is the Global Retail Store Dashboard,
and lets you see the main KPIs of the stores you are responsible for.
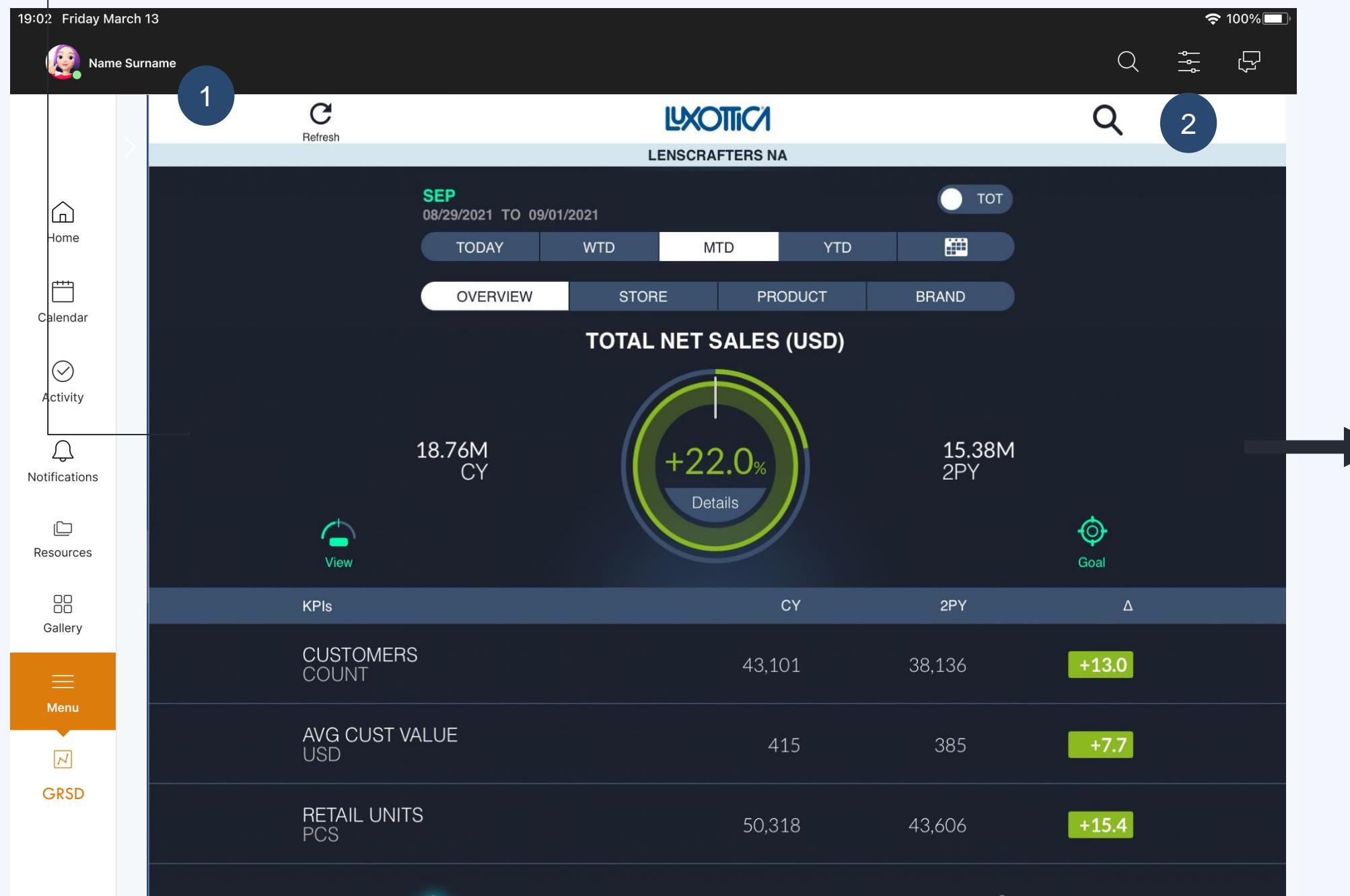
2

If you click on magnifying glass, this screen will appear.
You can search by: field, zone, region, store.
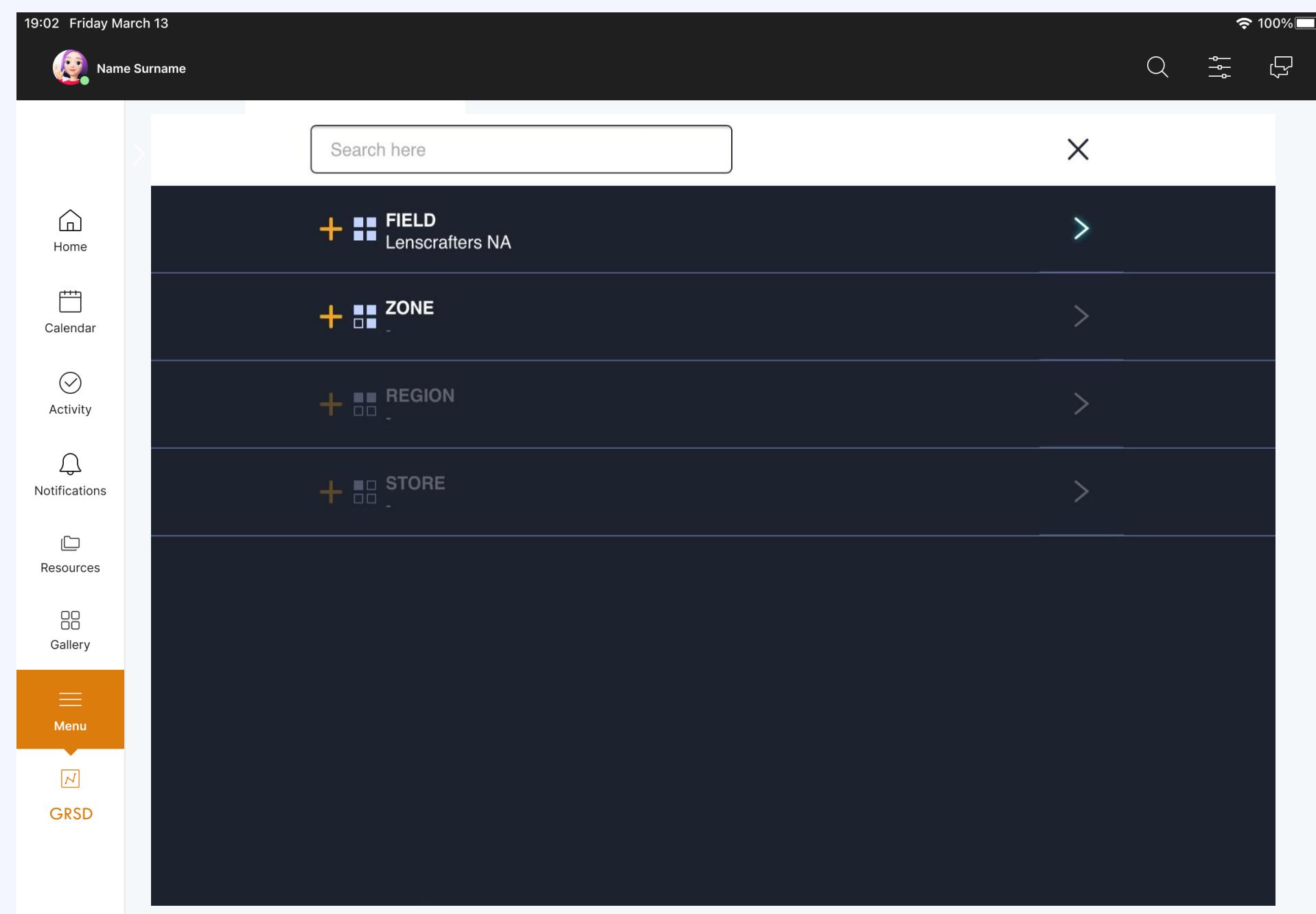
ACTIVITY EXECUTION

ACTIVITY WORKFLOW

NEWS

NEW

The News has been shared with you

Open news →

IN PROGRESS

The News is open and being read

Mark as read →

READ

The news is read

COMMUNICATION TASK

NEW

The Task is open and being read

Open task →

IN PROGRESS

The Task is open and being completed

Save the project as in approval →

IN APPROVAL

The completion is pending approval

CLOSED

The completion is pending approval

REWORK

The completion is pending approval

LEONARDO

TASK STATUSES

STATUS	STATUS ICON	MEANING
NEW	NEW	The project is new and needs to be opened
IN PROGRESS	IN PROGRESS	The project is ongoing and still needs to be closed
IN APPROVAL	IN APPROVAL	The project is completed and pending validation
REJECT ACTIVITY	CLOSED	The project is closed no further action is needed
APPROVE PROJECT	READ	The news or information has been marked as read, no further action is needed
PUBLISH	OVERDUE	The project hasn't been closed and has passed its due date
SAVE (STILL IN PROGRESS)	CANCELLED	The project has been recalled by its creator, no further action is needed
MARK AS READ	REWORK	The project completion has been rejected by the creator and needs to be redone

ACTIVITY ACTIONS AND STATUSES

PICTURE STATUS	MEANING
SAVED	The photo is in 'saved' status when the person who uploaded it has saved it but not published it. The photo is visible only to the uploader
IN APPROVAL	The photo is in the 'approval' status when the approval toggle has been activated in the task, and the photo needs to be approved before being published
REJECTED	The photo is in 'rejected' status when, during the approval process, the photo is found to be non-compliant with some parameter of the task
APPROVED	The photo is in the 'approved' status for maintenance tasks
PUBLISHED	The photo is in 'published' status when it is visible both in Smartly Picture Management and on the Picstore platform

VISIT STATUS	MEANING
PLANNED	The visit has been planned; it is visible both in the calendar and in the activity section.
IN PROGRESS	The visit has been started but not completed yet. The visitor started to answer to the questions of the survey(s) collecting the required info. When the visit is "in progress" there is still the possibility to edit or cancel it.
CLOSED	The visit has been completed. The visitor collected all the required info. When the visit is "closed" there is no more the possibility to edit or cancel it.
CANCELLED	The visit has been cancelled. A visit can be cancelled only by the one who planned it.

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HOW TO VIEW AND CLOSE A NEWS

News are not task related. They can include links, videos and text.

1 From the Home Page, you can open the article by clicking on the News in the Newsfeed, in the list of activities or in the Activity section.
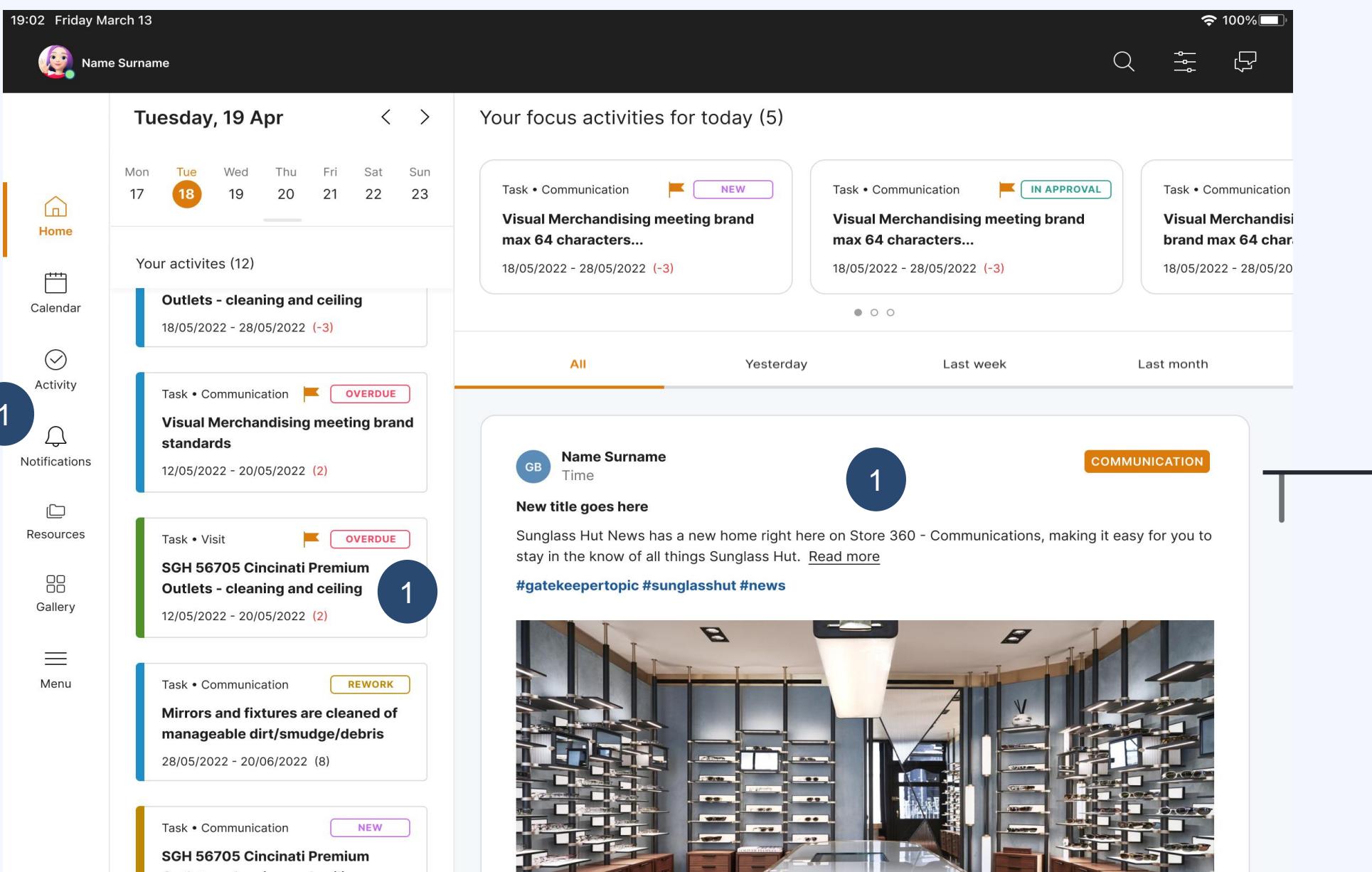
2 Scroll down to read the news or view any attachments or videos.
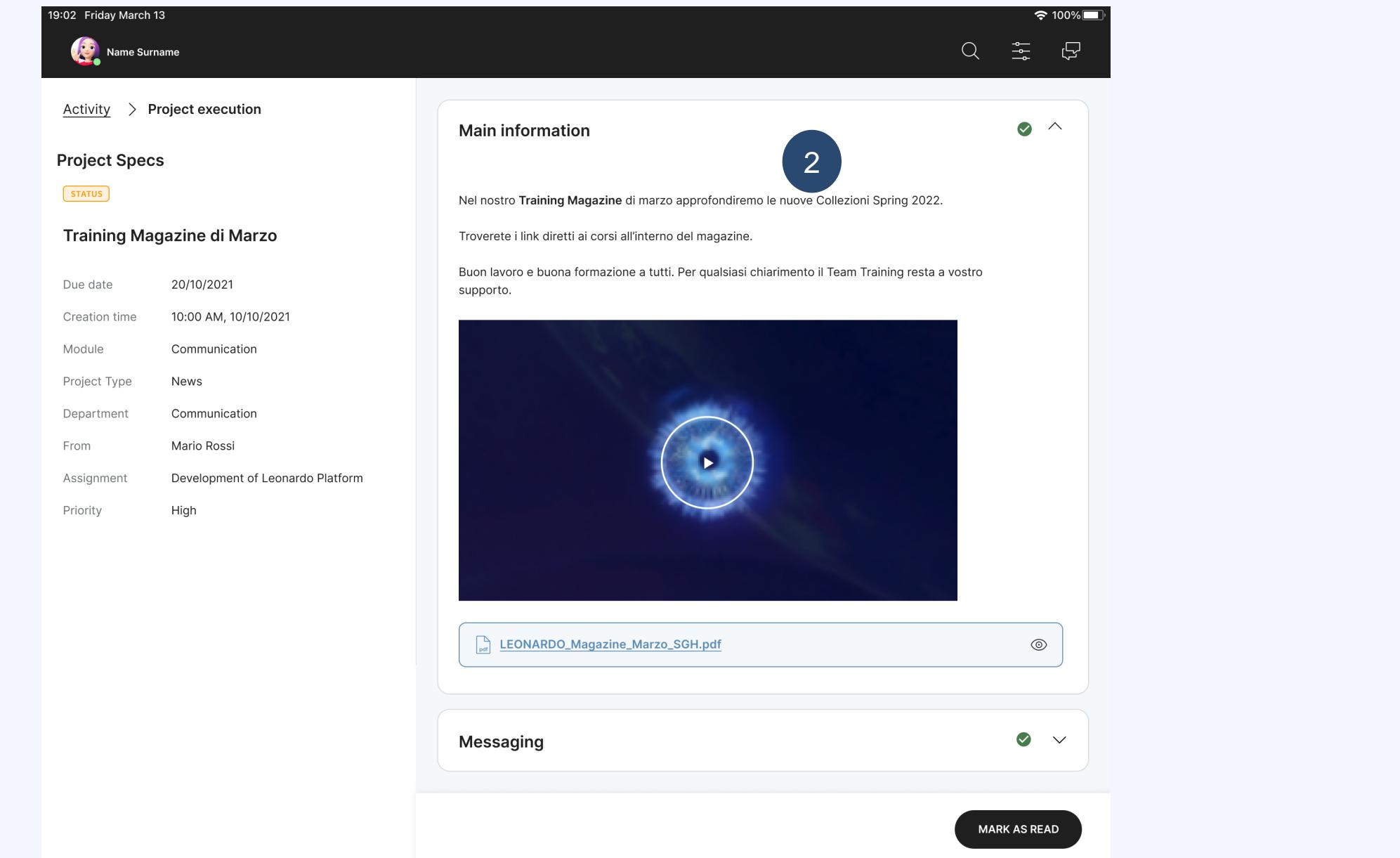
HOW TO VIEW AND CLOSE A NEWS

You can also send a message if messaging is enabled.

3 Click on Messaging to add a message, select the object of the message from the list, type in the message and send it.
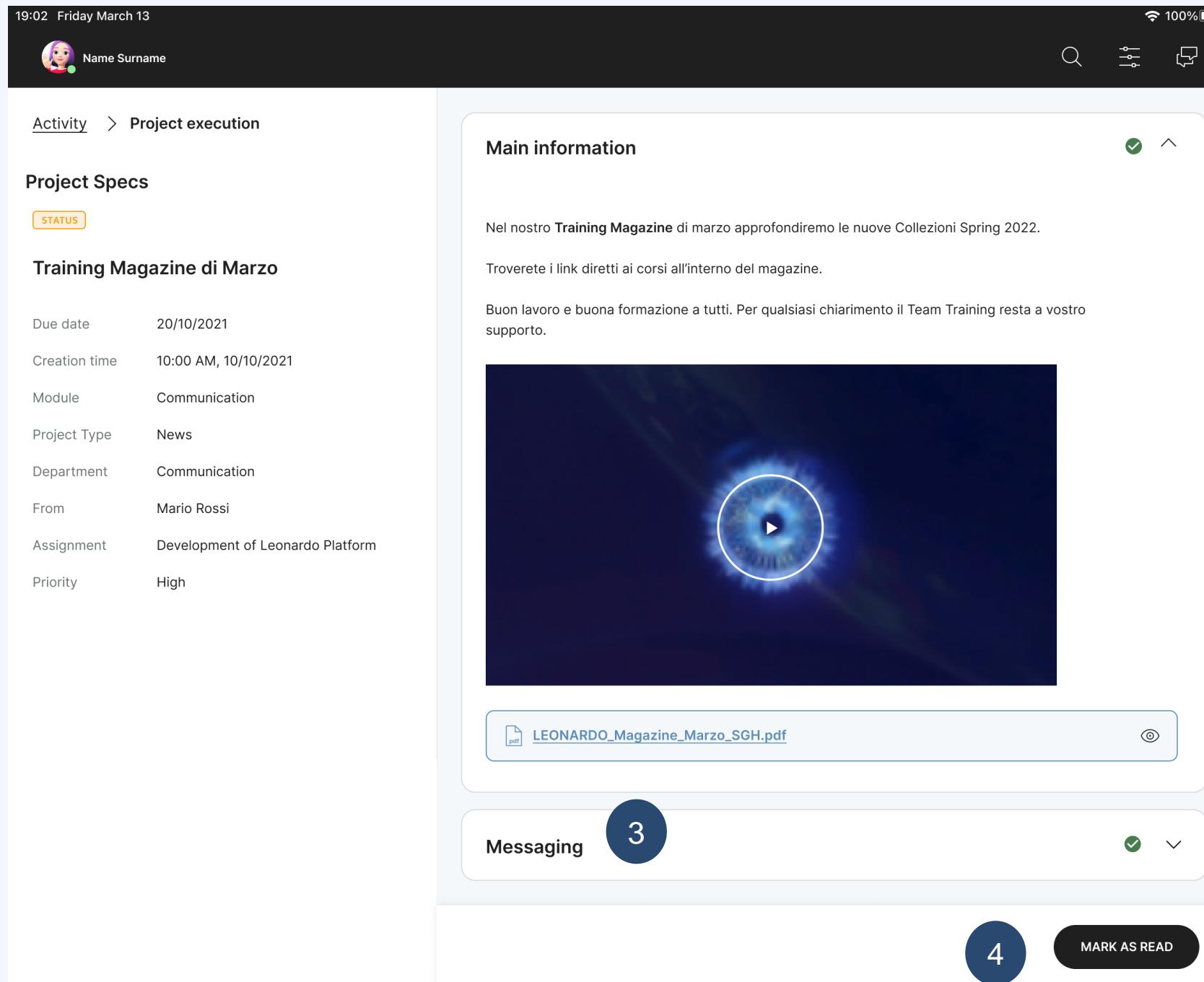
4 Click on Mark as Read to complete the project. If you don't click on «Mark as Read», the project won't be completed.

5 The News status will pass from «In progress» to «Read».
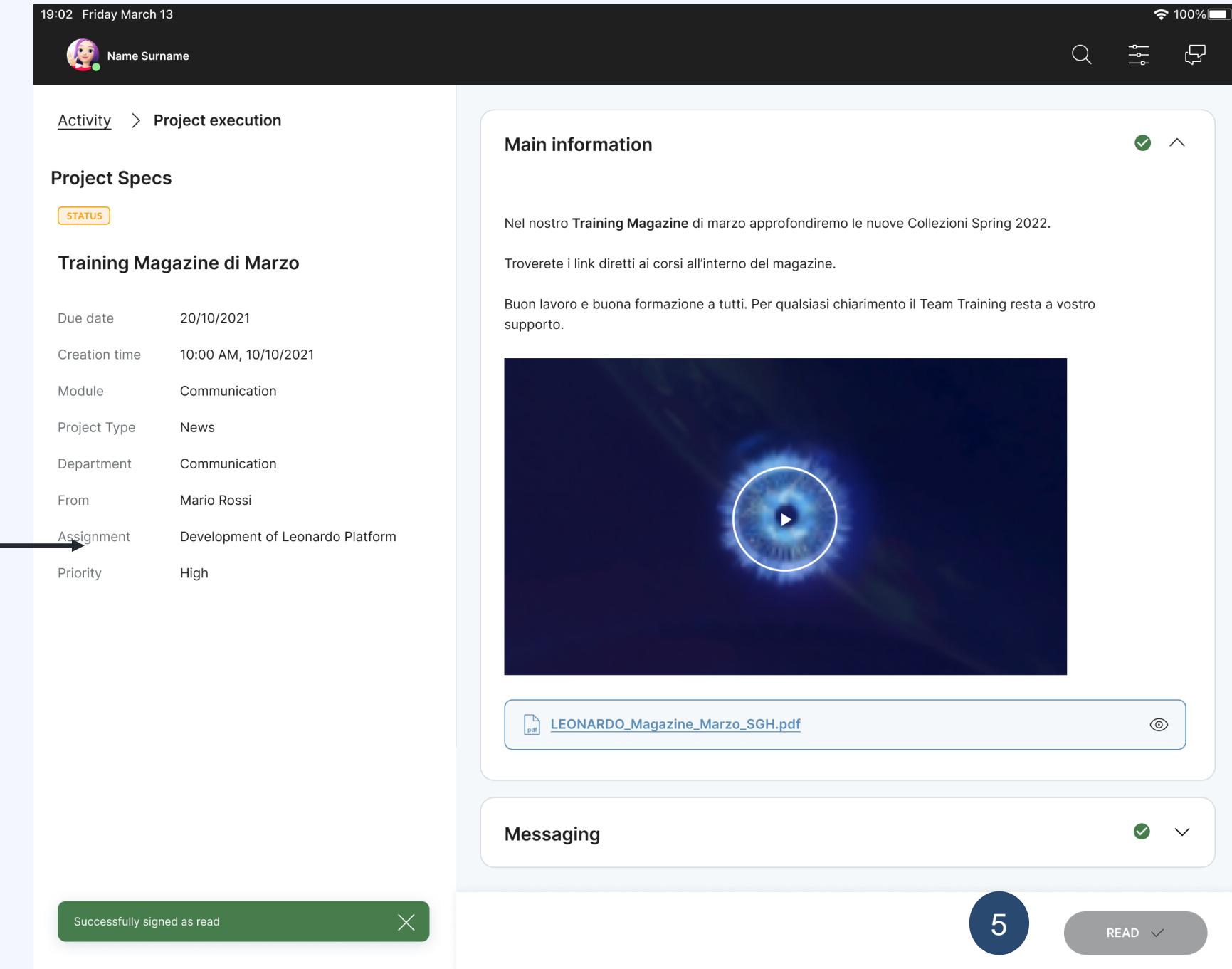
HOW TO COMPLETE A COMMUNICATION TASK

Communication tasks require you to complete actions such as answering questions, performing tasks and completing surveys.

1 From the Home Page, click on the communication task from the list of activities, from the Calendar or from the Activity section.
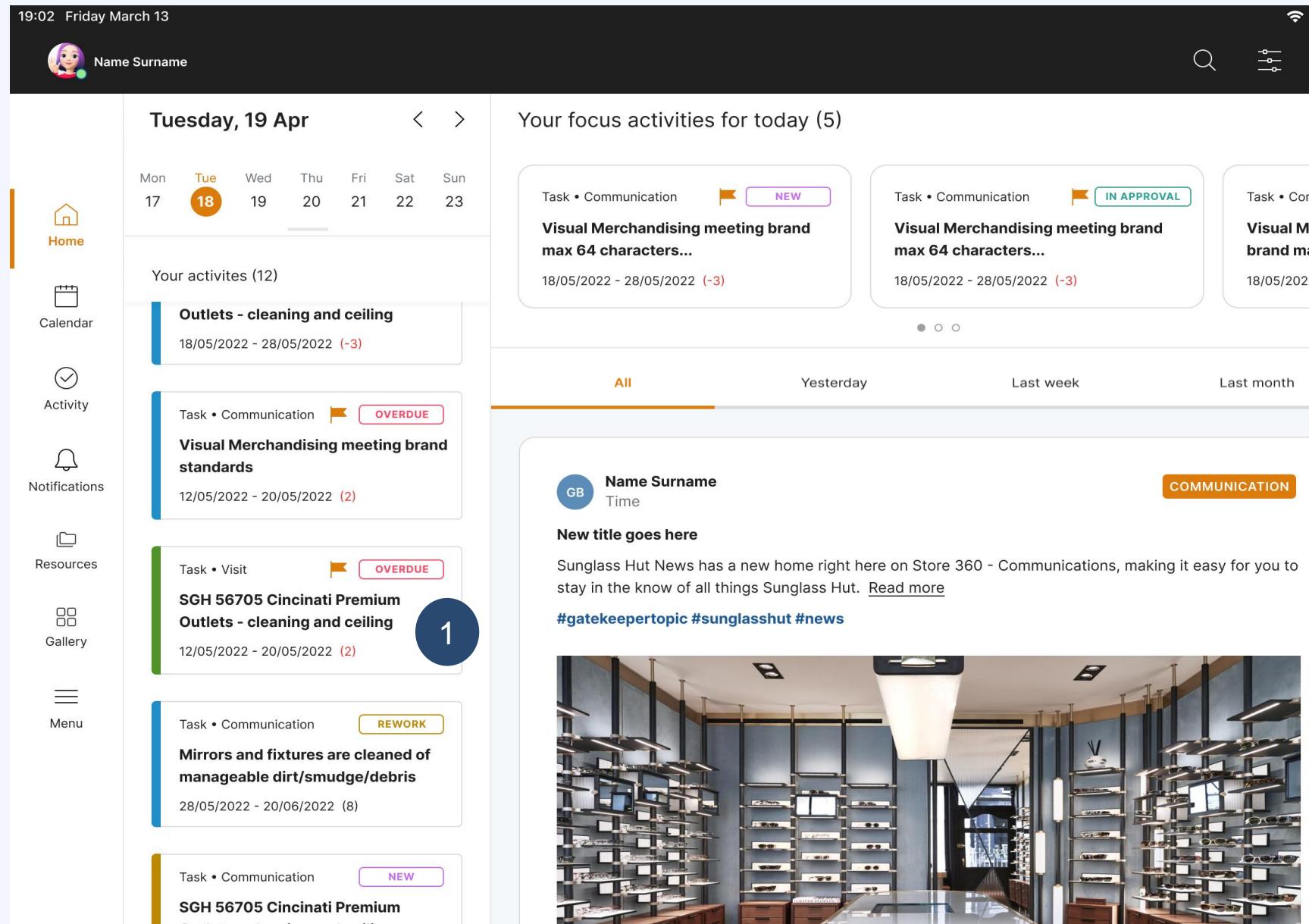
**2** The Project Task Page shows its Main Information and actions to be performed, which can be Questions, Tasks and Surveys.
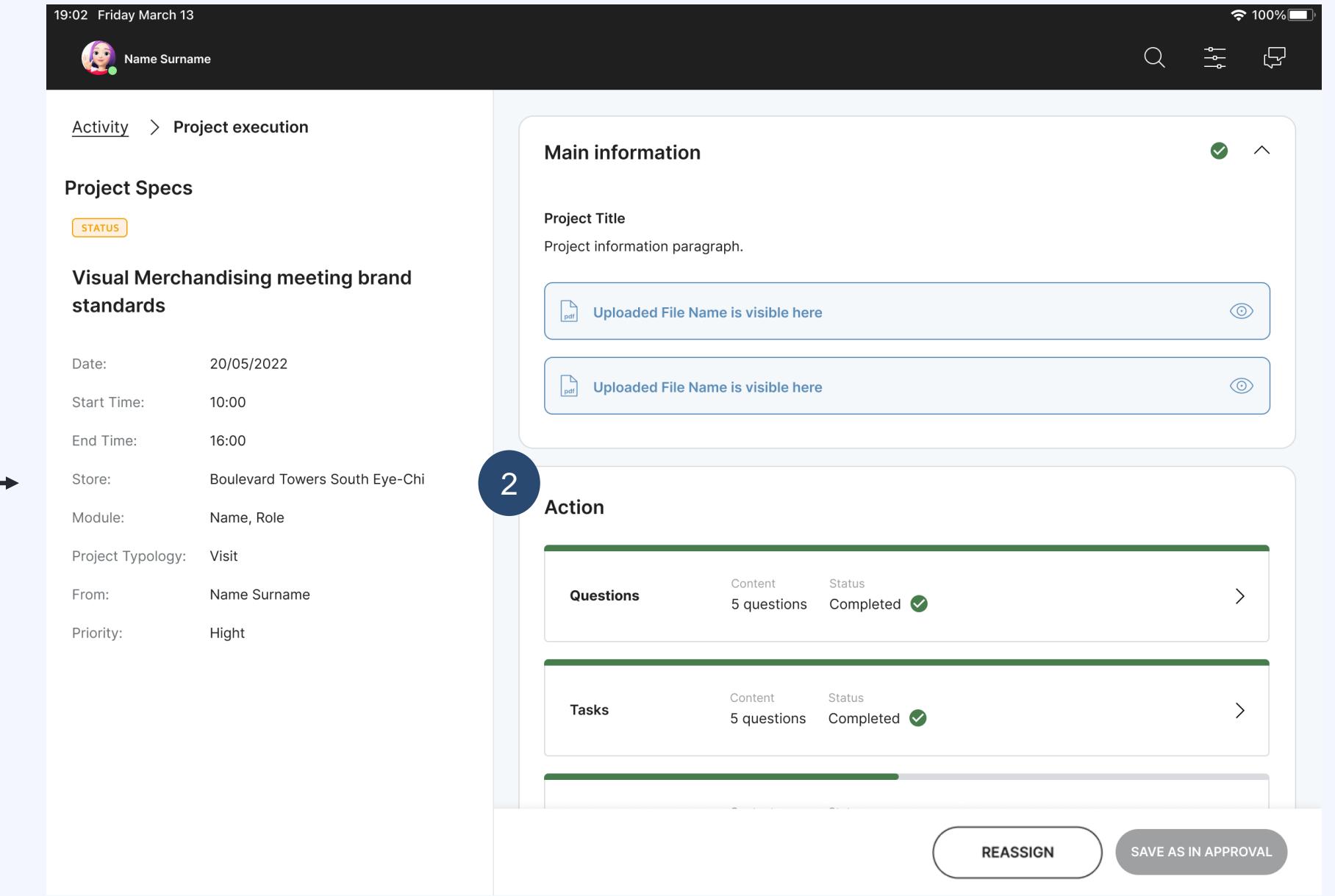
HOW TO COMPLETE A COMMUNICATION TASK

Answer questions if the project includes them.

3   Answer all questions, which can be single question, multiple choice, yes or no, etc. Answered questions are marked with a green progress bar.

4   You may be asked to upload files in order to complete a question.

HOW TO COMPLETE A COMMUNICATION TASK

Proceed by completing tasks and surveys.

5 Each task and each survey shows its relevant information and progress bar.

6 You can decide to execute a task or to delegate it. At the end of the Task there is the specific button to delegate it and you can select to whom you want to delegate it.

HOW TO COMPLETE A COMMUNICATION TASK

Here is an example of survey execution.

7 Click on the arrow to execute the survey

8 Or delegate it.

9 Answer all questions of the survey.

10 Click on the arrow to continue.
When you have completed the survey, a message will appear to confirm it.
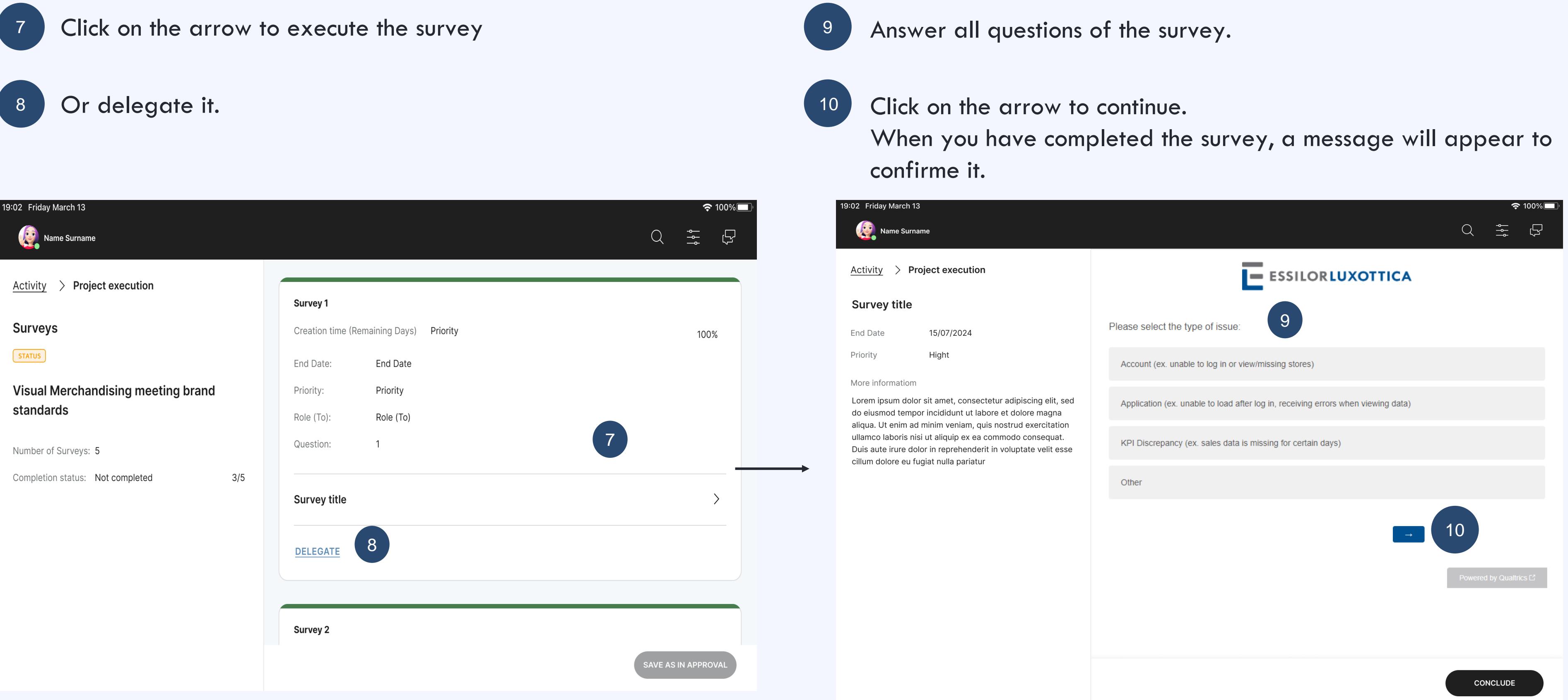
HOW TO COMPLETE A COMMUNICATION TASK

11 You can always automatically save your progress if you close the task and continue later. The task status will update into In Progress.

12 Once you complete all questions, tasks and/or surveys, click on Save as In Approval to send the completion for approval. Once the project completion is approved, the project status will pass to Close.

19:02 Friday March 13   100%

Name Surname

Activity > **Project execution**

Project Specs

STATUS

Visual Merchandising meeting brand standards

Date:	20/05/2022
Start Time:	10:00
End Time:	16:00
Store:	Boulevard Towers South Eye-Chi
Module:	Name, Role
Project Typology:	Visit
From:	Name Surname
Priority:	Hight

Main information

Project Title
Project information paragraph.

Uploaded File Name is visible here

Uploaded File Name is visible here

Action

| Questions | Content 5 questions | Status Completed |
| Tasks | Content 5 questions | Status Completed |

REASSIGN   SAVE AS IN APPROVAL

11

HOW TO REASSIGN A COMMUNICATION TASK

In case you don't want to execute the task, click on «Reassign» and follow these steps:

1 Click on «Reassign»

2 A pop up will appear, where you have to specificy which project you are going to reassign and to which assignee

HOW TO REASSIGN A COMMUNICATION TASK

3 Select the Role Reassignment such Store Associate.
Below you can visualize the Reassignment history.

4 Select the Name and the Surname of the assignee, is not mandatory.

Select the Type of the Reassignment inbetween:

5 **Cumulative Reassignment:** the task can be executed from both the original and the new assignee.

6 **Substitutive Reassignment:** the task can be executed by the new assignee only

7 Click on «Continue»

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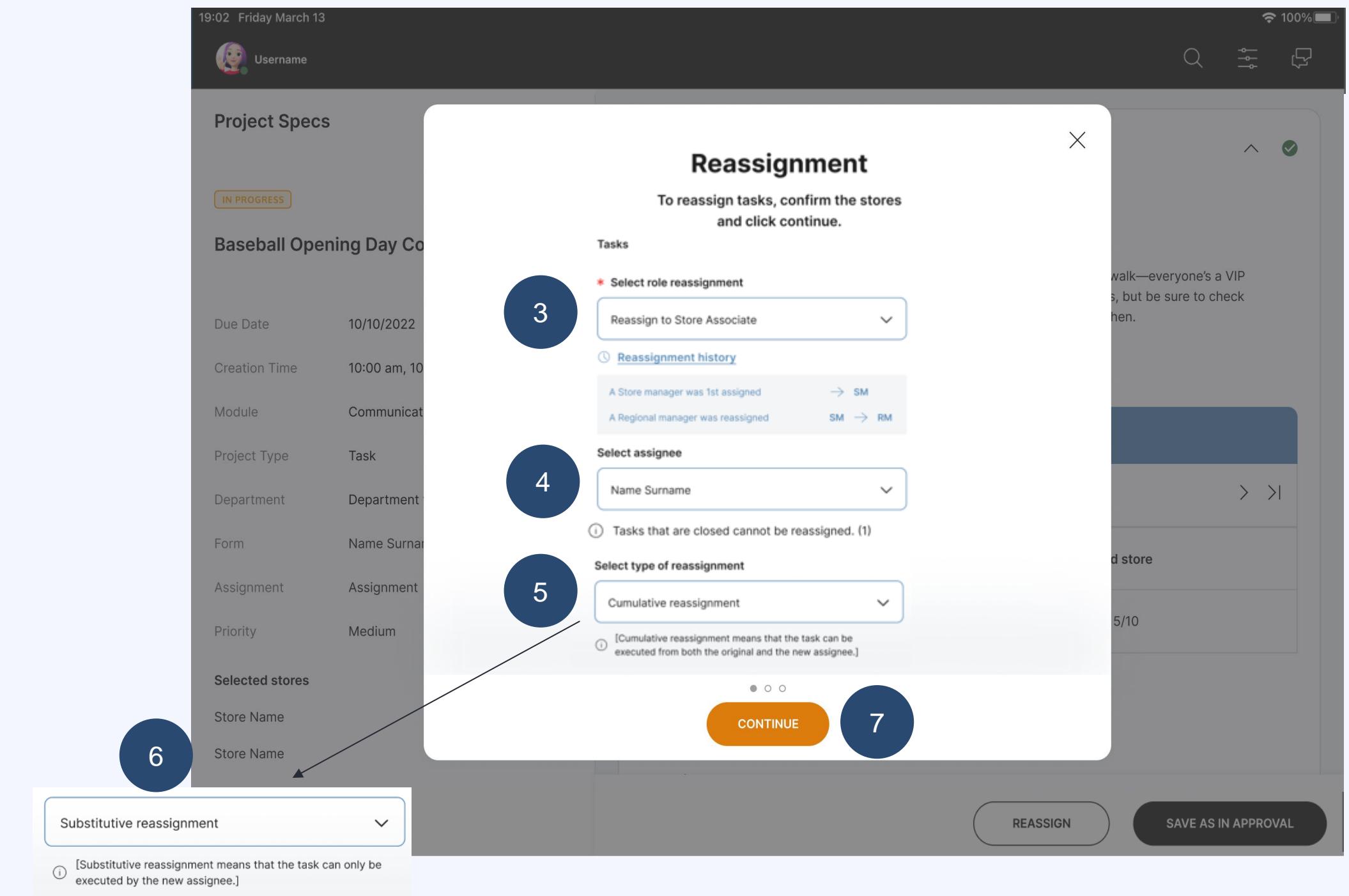
HOW TO REASSIGN A COMMUNICATION TASK

8 To conclude the reassignment, enter a reason for the reassignment

9 Click on Confirm to reassign the task
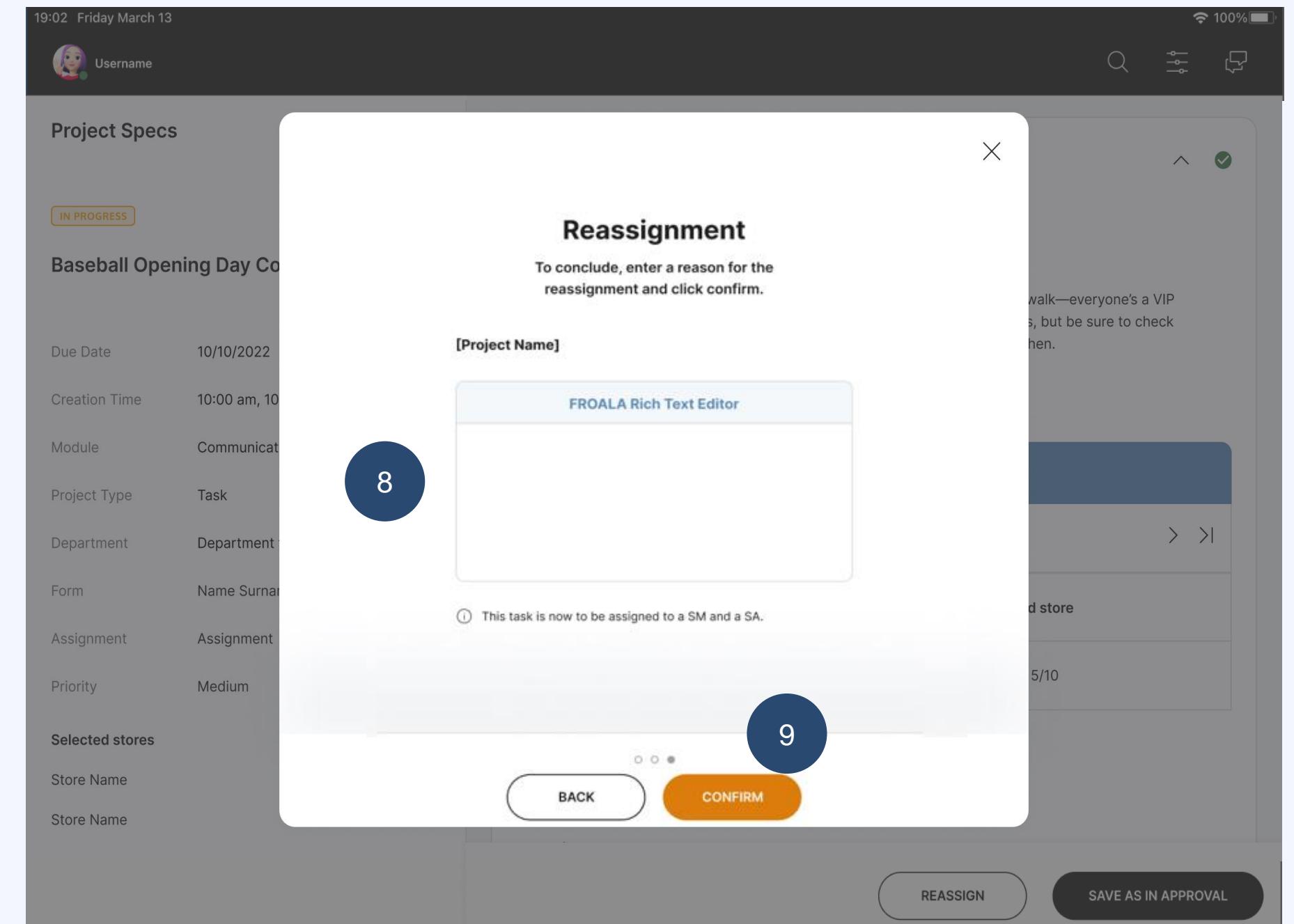
HOW TO COMPLETE A PHOTOGRAPHIC TASK

Photographic tasks require you to complete tasks via taking pictures of specific products or parts of the store.

1 From the Home Page, click on the photographic task from the list of activities, from the Calendar or from the Activity section.
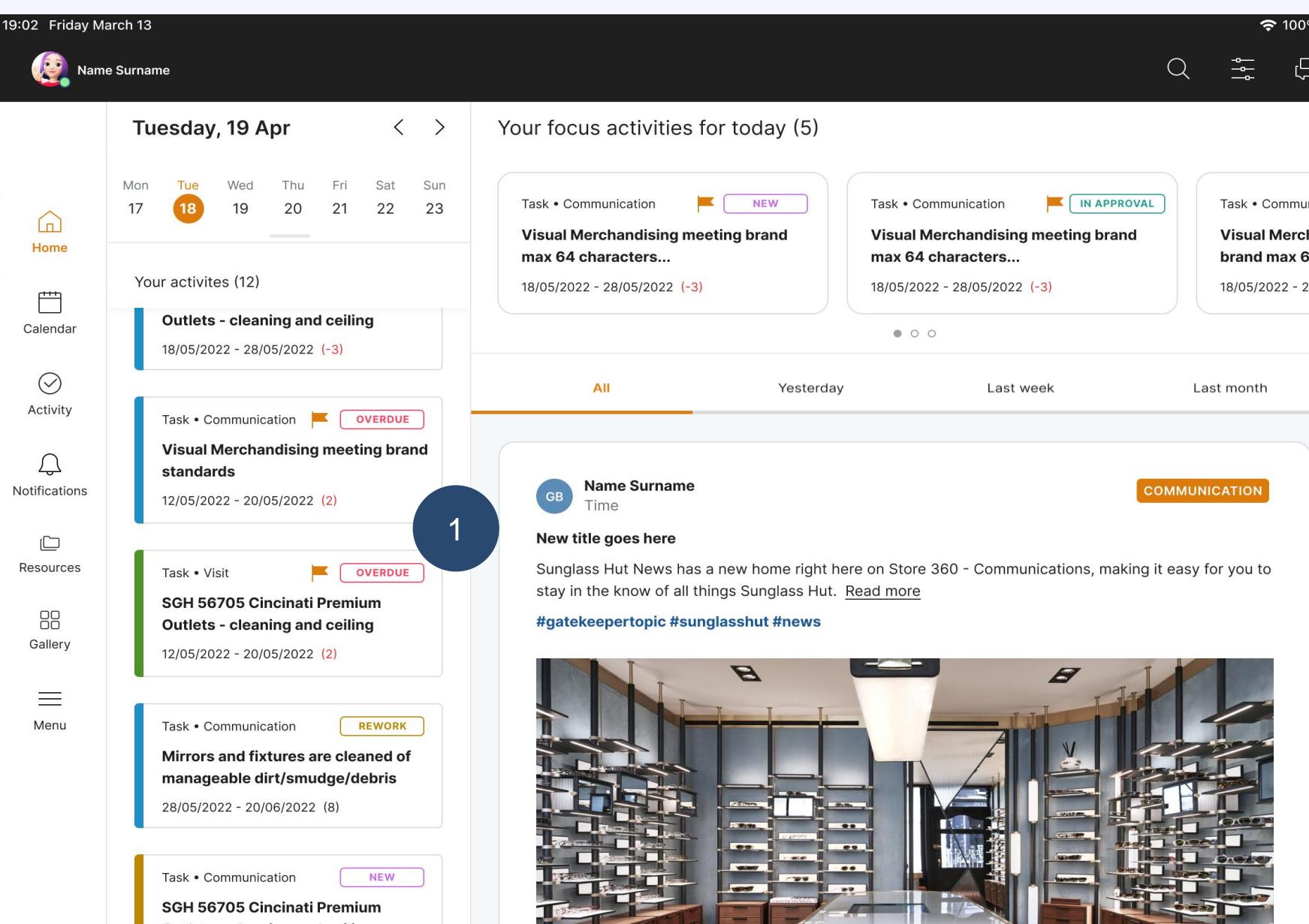
2 The Project Specs shows its Main Information and actions to be performed.

3 Click on «Accept Task» to take in charge the task or «Do not accept» to refuse the task.
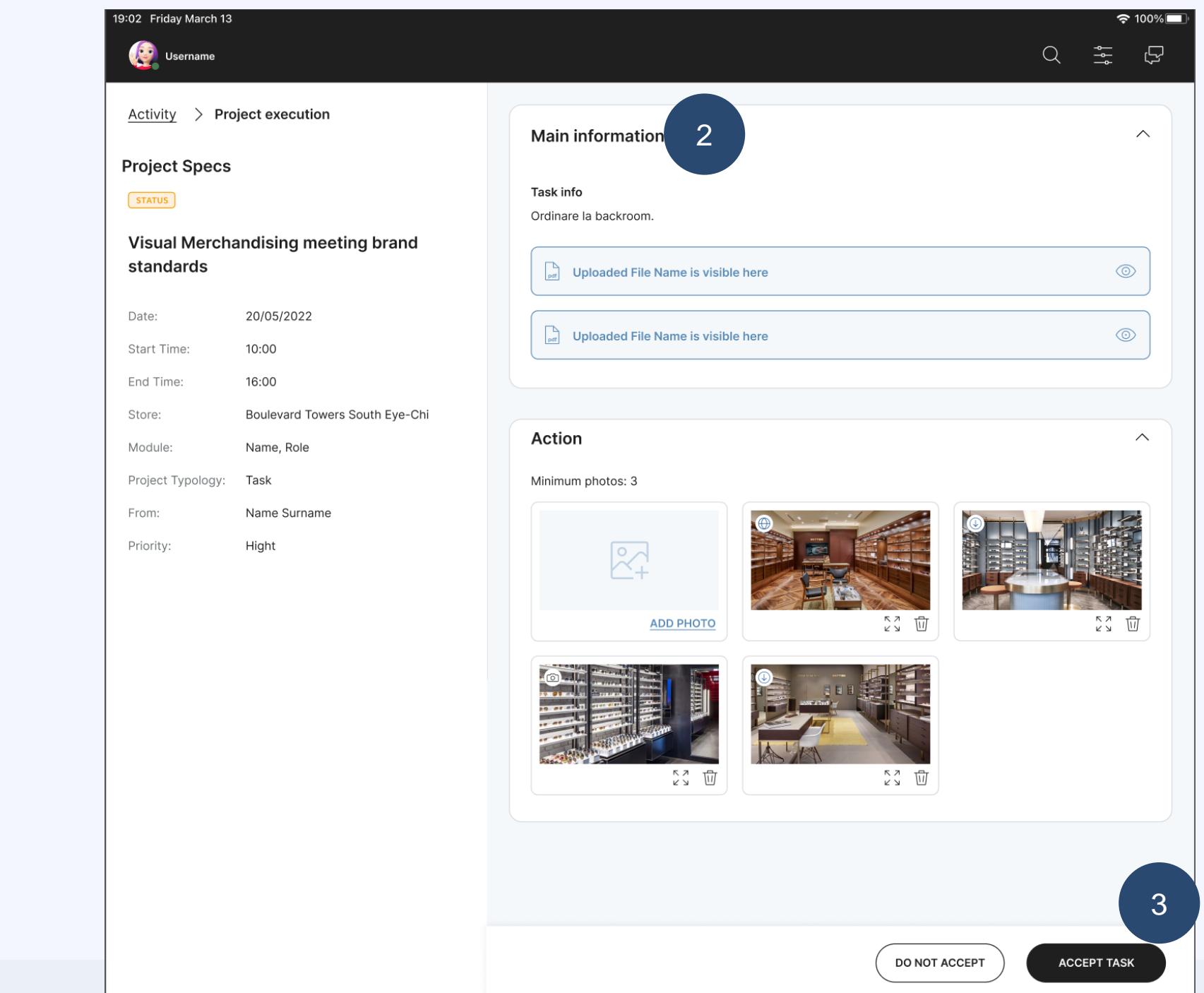
HOW TO COMPLETE A PHOTOGRAPHIC TASK

Photographic tasks require you to complete tasks via taking pictures of specific products or parts of the store.

1 Once you have accepted the task, click on «Action» to open the section, then click on «Add Photo» to upload pictures.

2 From the pop up message «Add photo», you can decide to:
1. Upload pictures from your gallery.
2. Take a photo with the picture capture function from your Ipad.
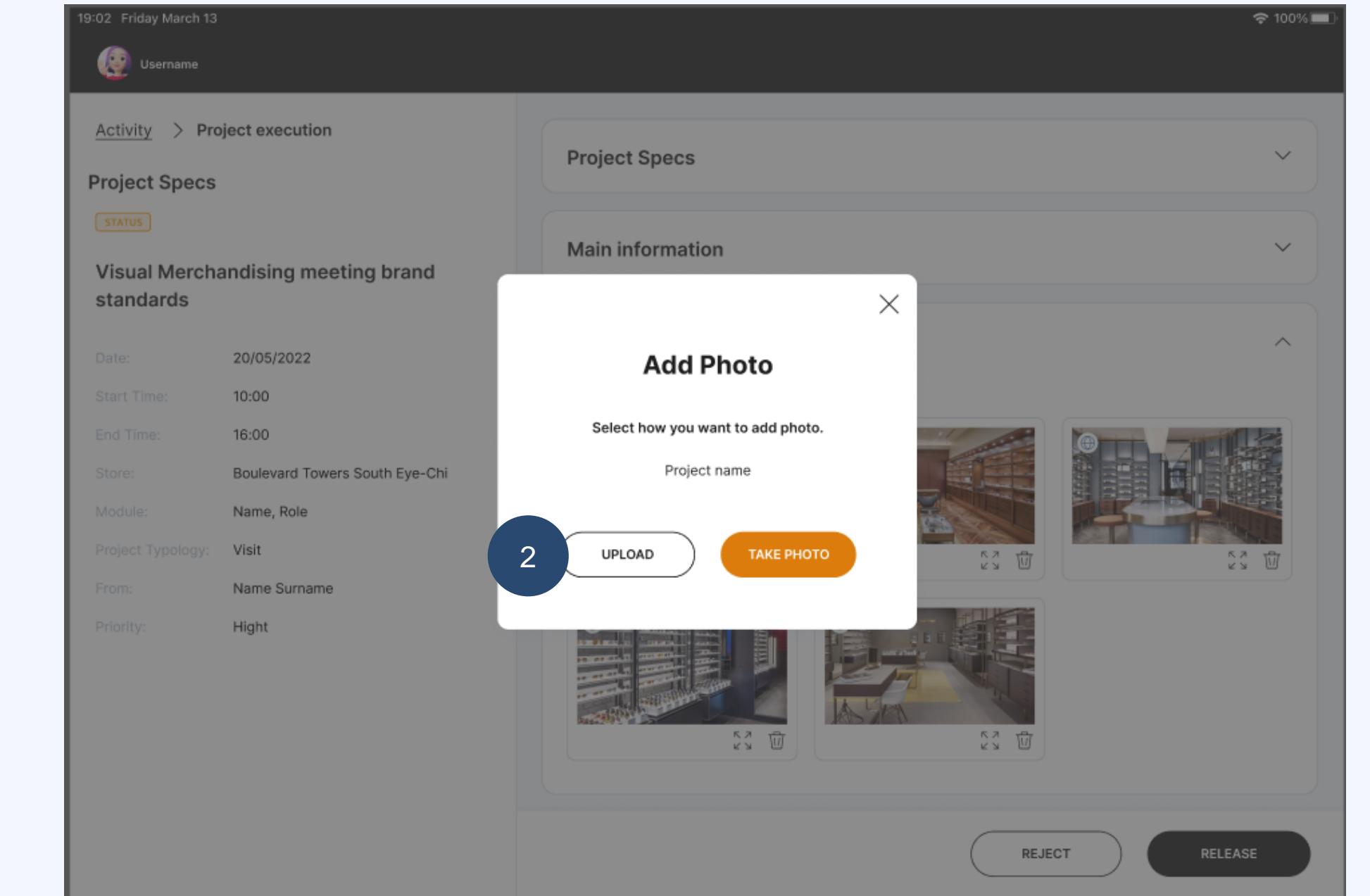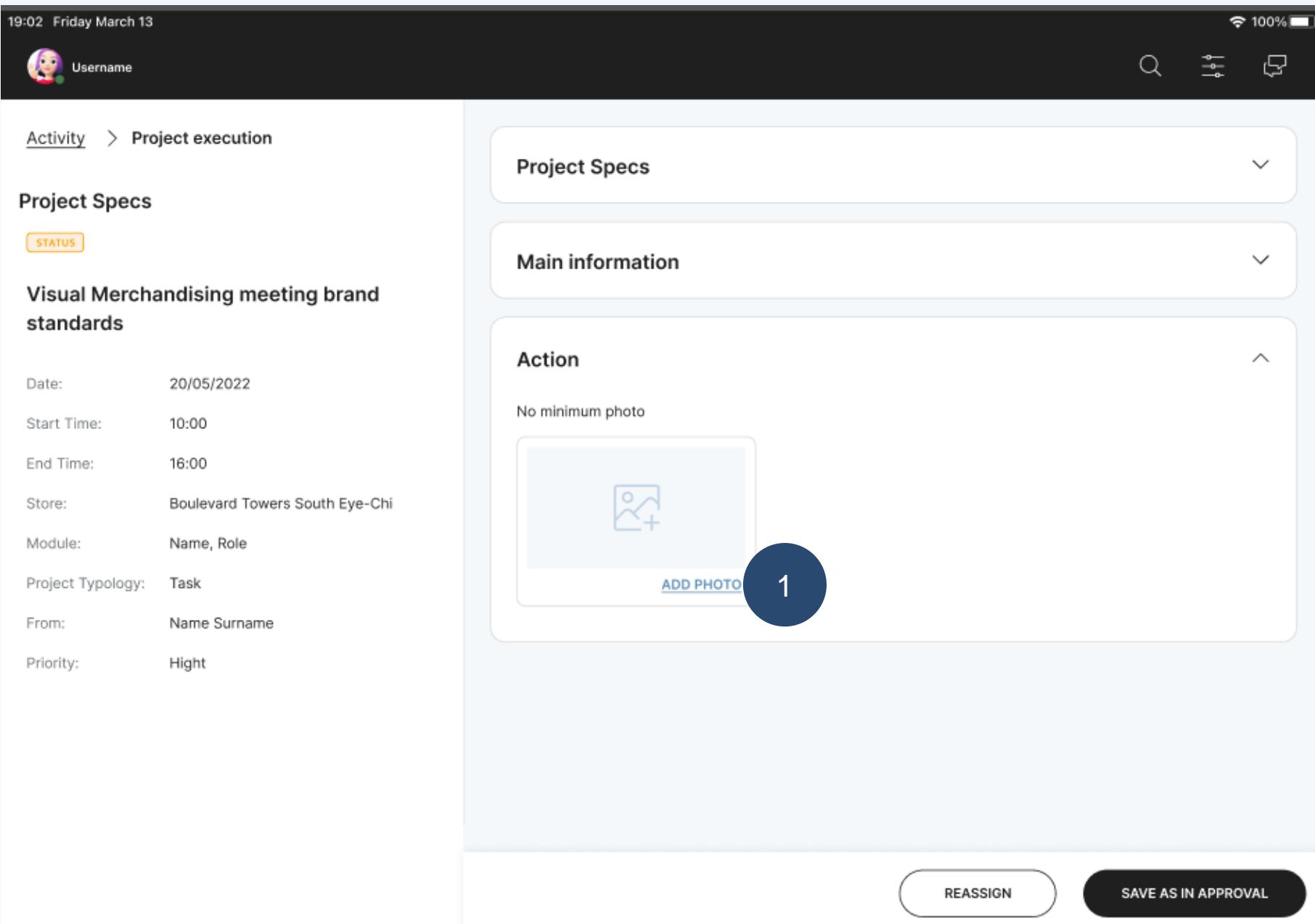
HOW TO COMPLETE A PHOTOGRAPHIC TASK

Once you have uploaded or took the picture, you will be asked to fill the information related to all the pictures

1 Insert the fixture count that can be seen from the picture
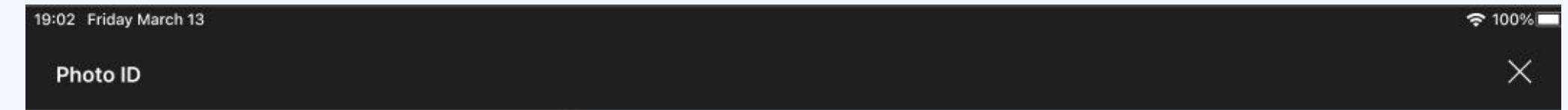
2 Insert the macro area of the store represented by the picture.
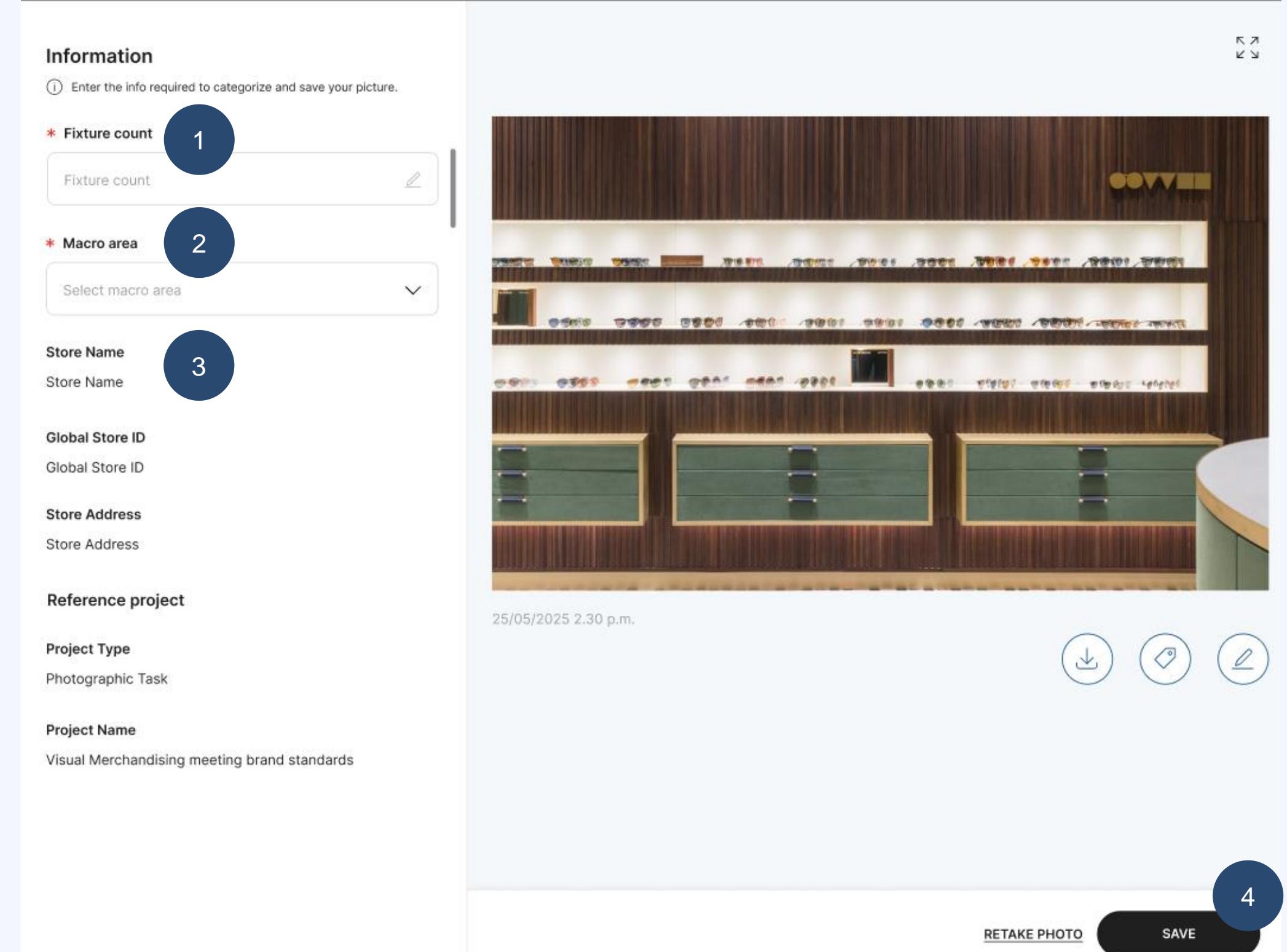
3 Below you can find the information as:

- Store name.
- Global store ID.
- Store Address.
- Project type.
- Project name.

4 Click on «Retake photo» if you want to take the picture again or on «Save» if you want to save it.

HOW TO COMPLETE A PHOTOGRAPHIC TASK

Once you have reached the minimum number of photo requested you can both:

1 Click on «Add photo» if you want to add pictures on top on the minimum number requested

2 Click on «Save in approval» to complete the task. If there are the approval requirements, you will need to wait the approvation of the task to be considered as closed.

3 Click on «Reassign» if you want to reassign the task to another colleague.

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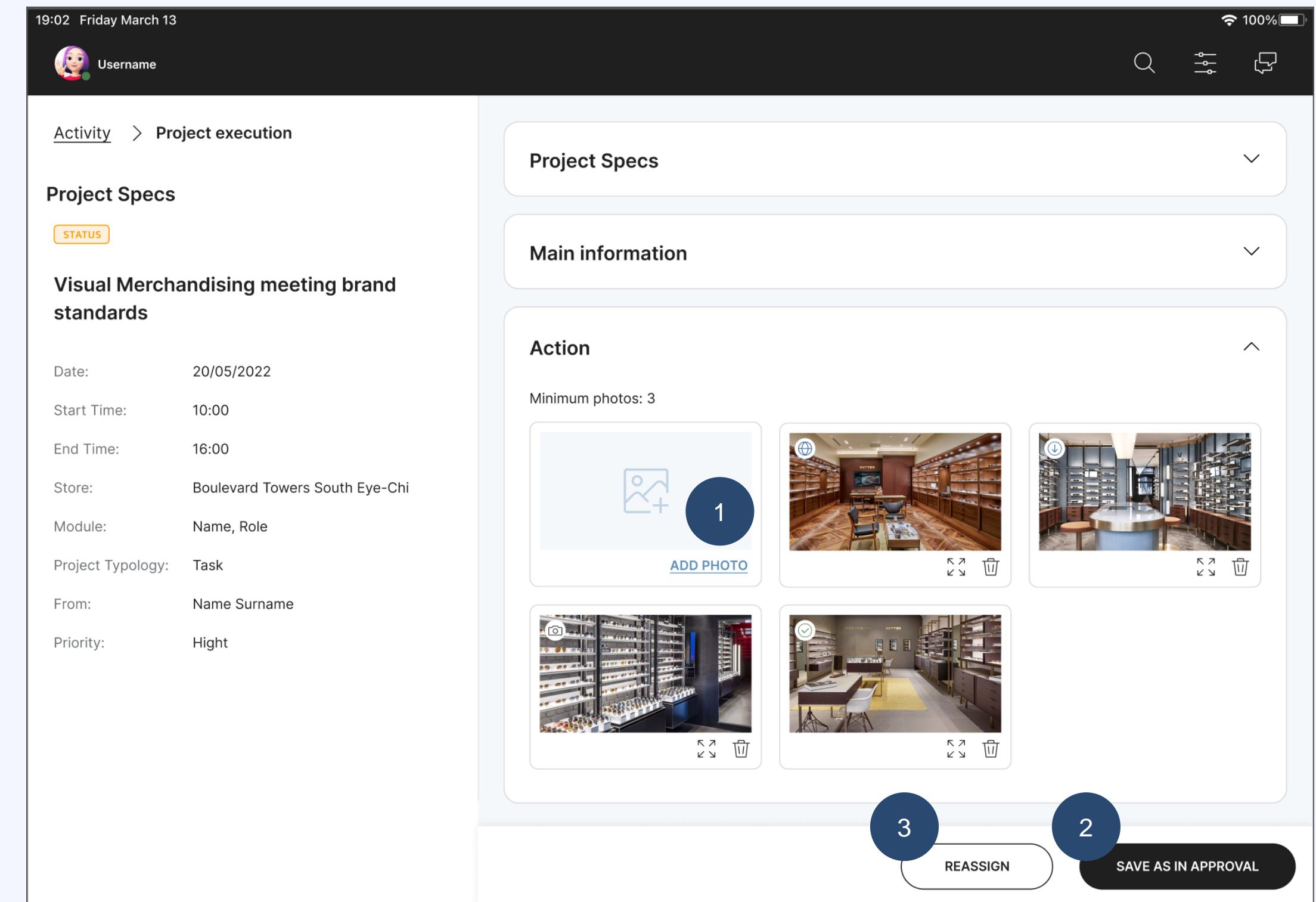
HOW TO REASSIGN A PHOTOGRAPHIC TASK

In case you don't want to execute the task, click on «Reassign» and follow these steps:

1 Click on «Reassign»
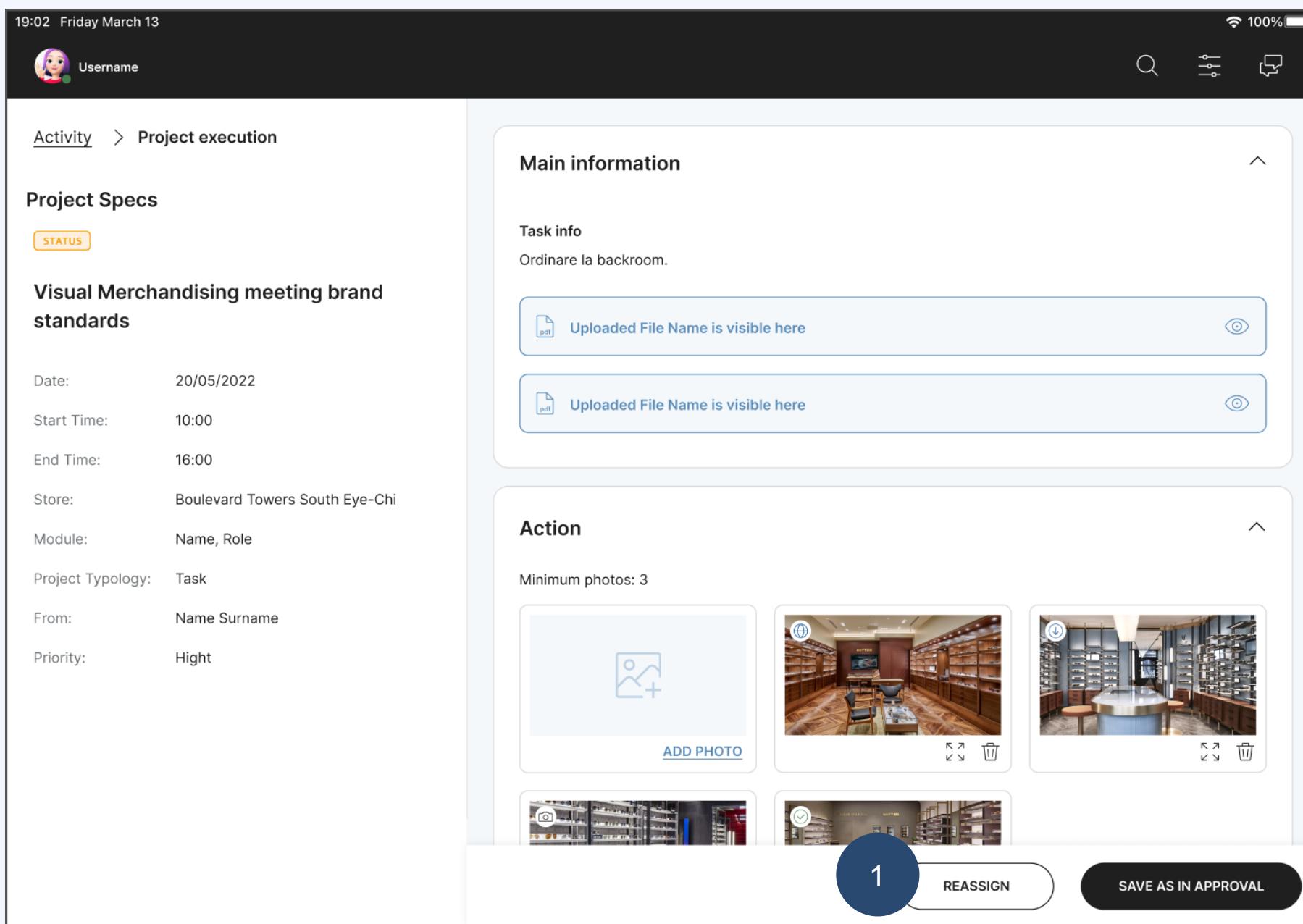
2 A pop up notification will appear, where you have to specificy for which store you are going to reassign the execution of the task
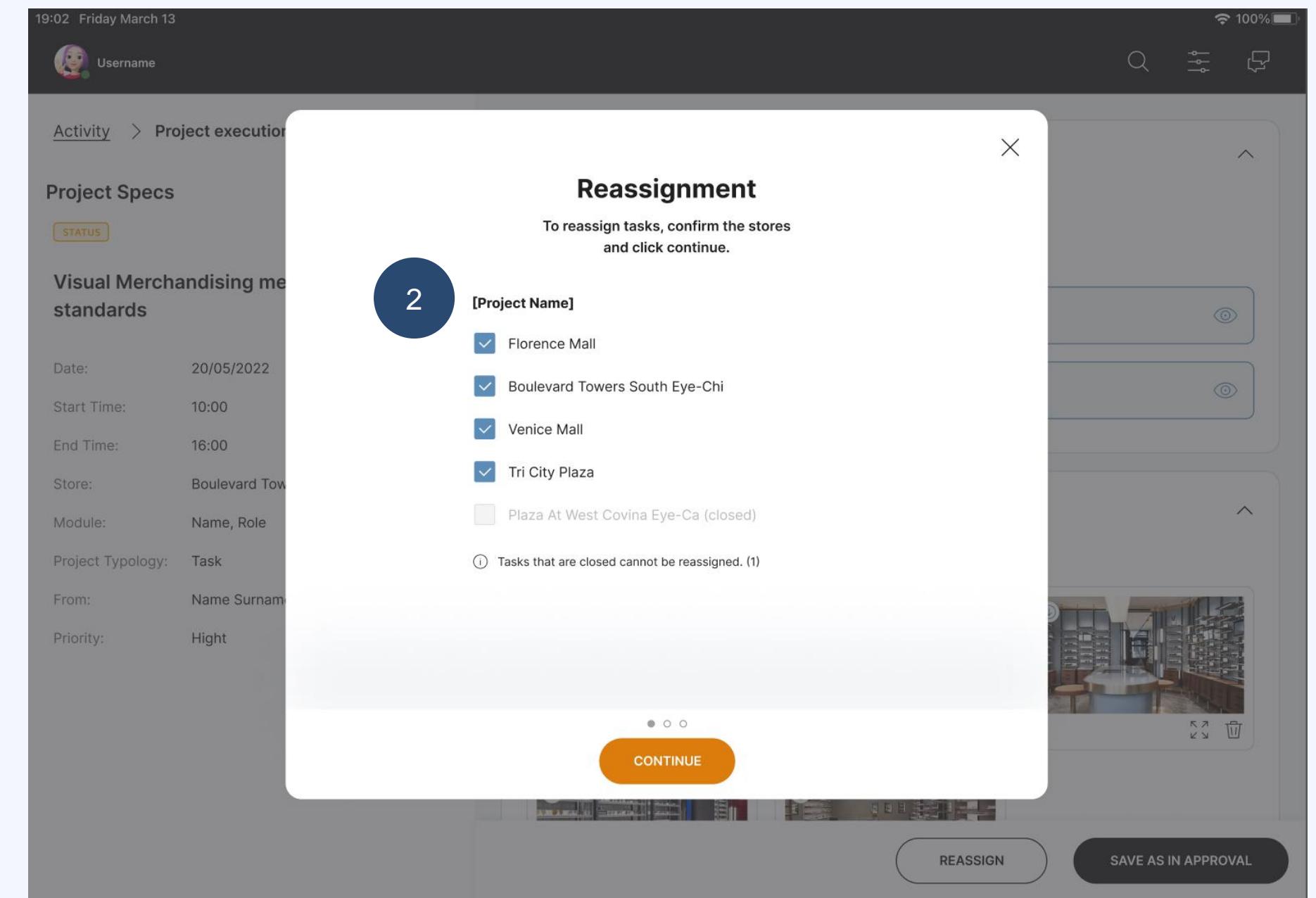
HOW TO REASSIGN A PHOTOGRAPHIC TASK

3 Select the Role Reassignment such Store Associate.
Below you can visualize the Reassignment history.

4 Select the Name and the Surname of the assignee

Select the Type of the Reassignment inbetween:

5 **Cumulative Reassignment:** the task can be executed from both the original and the new assignee.

6 **Substitutive Reassignment:** the task can be executed by the new assignee

7 Click on «Continue»
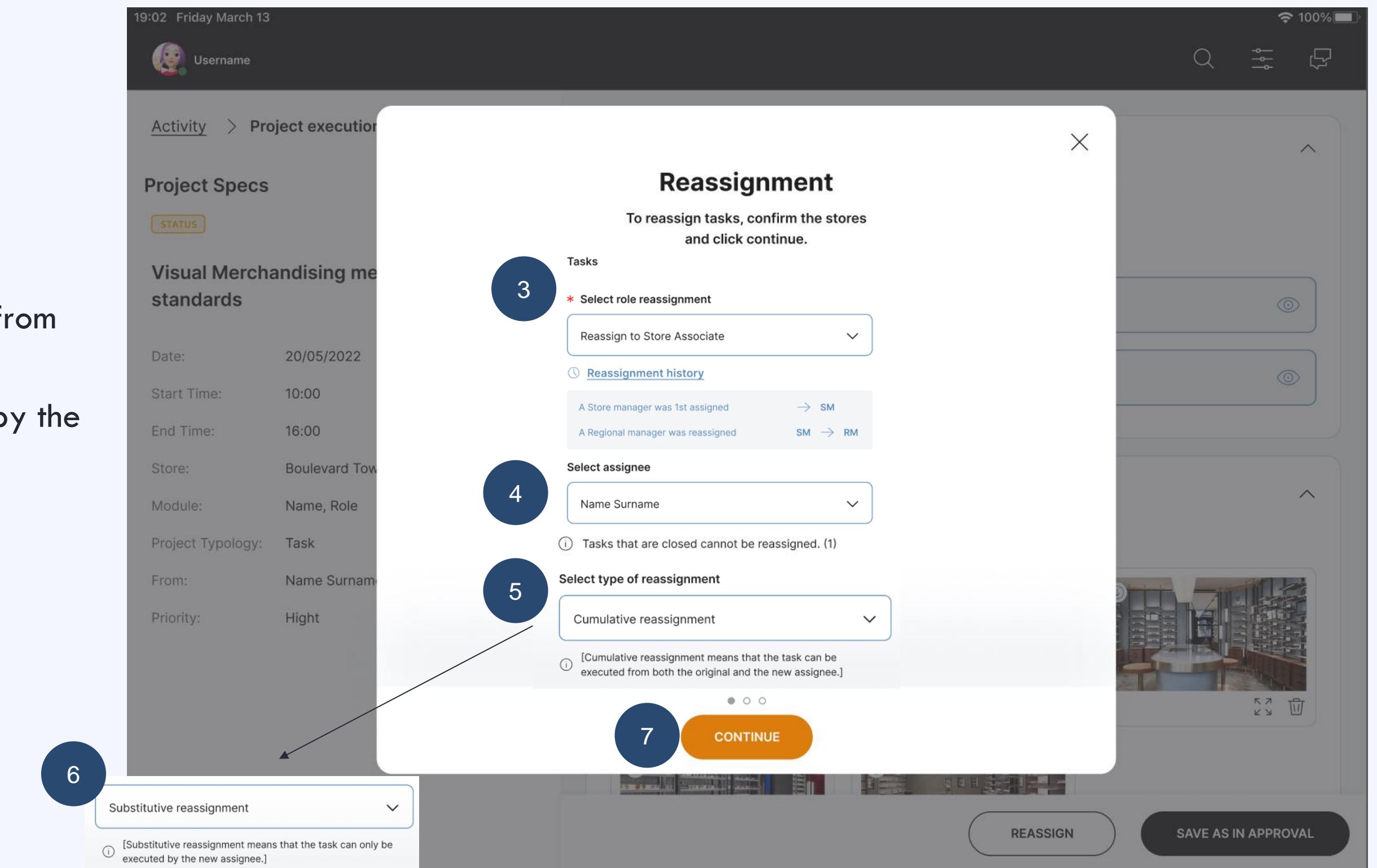
HOW TO REASSIGN A PHOTOGRAPHIC TASK

8 To conclude the reassignment, enter a reason for the reassignment

9 Click on Confirm to reassign the photographic task
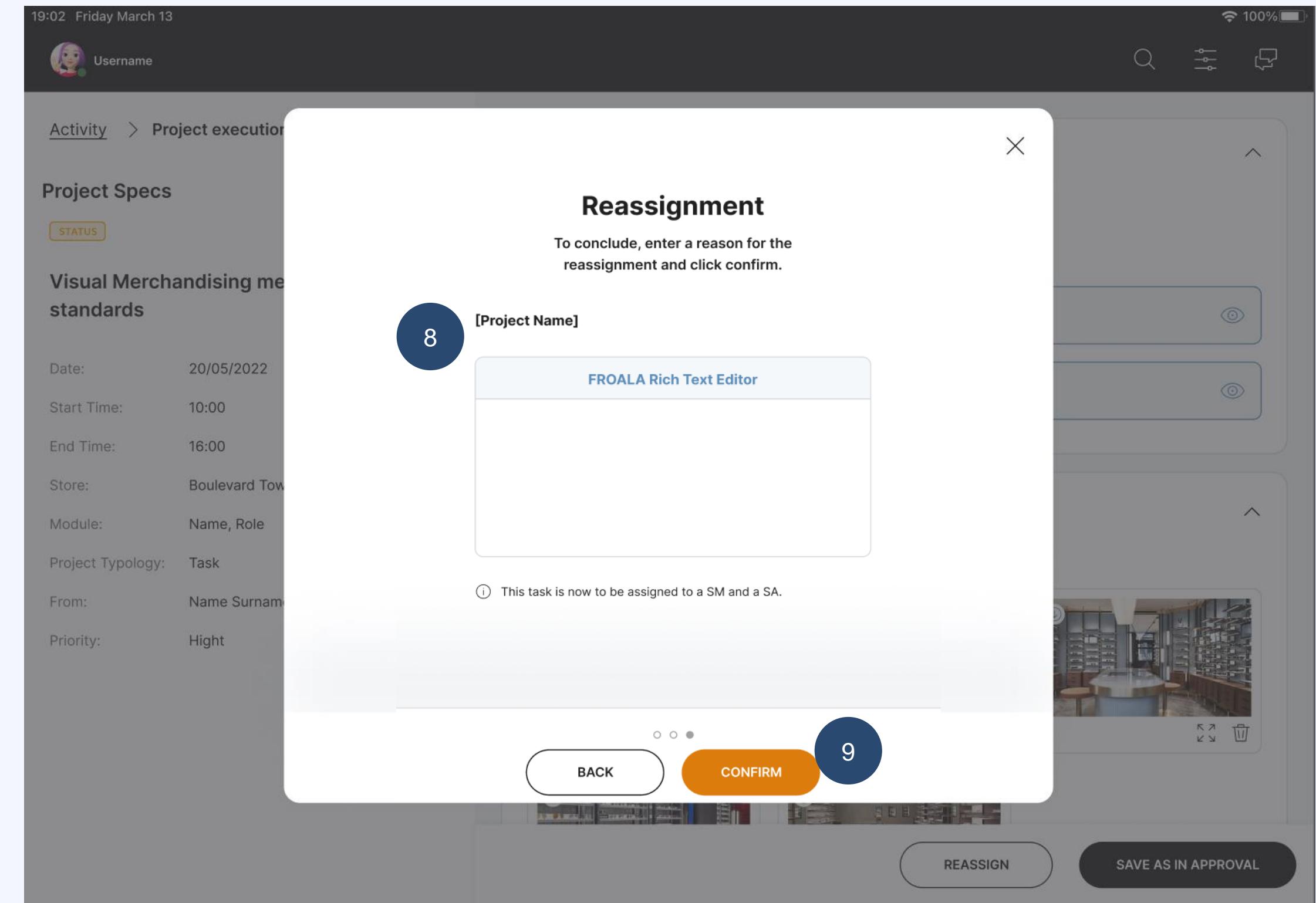
HOW TO PLAN AN AUTO-VISIT

Use it to collect information from your stores

1 From the entry page, click on the + sign to plan an auto-visit
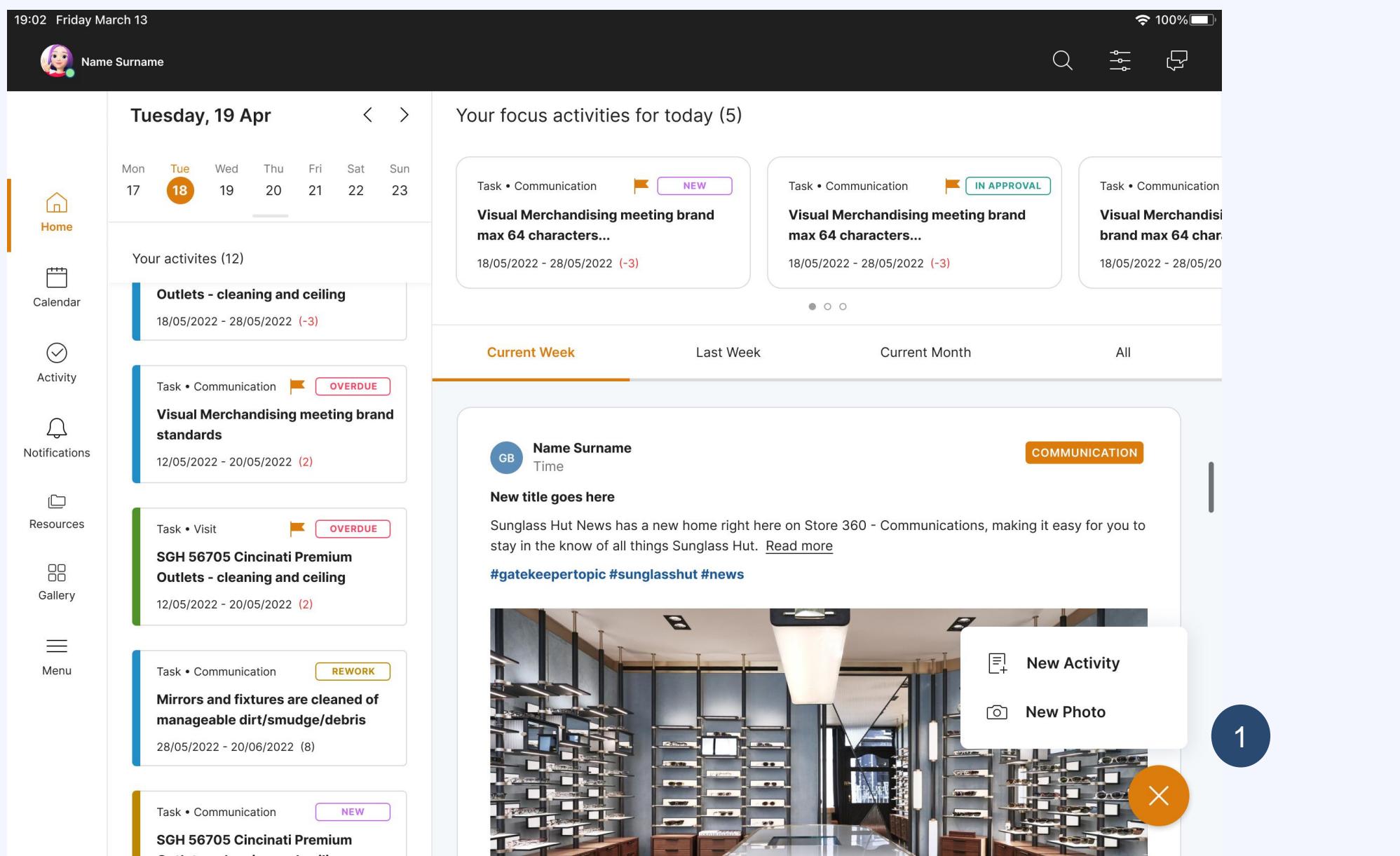
2 Click on the Visit icon
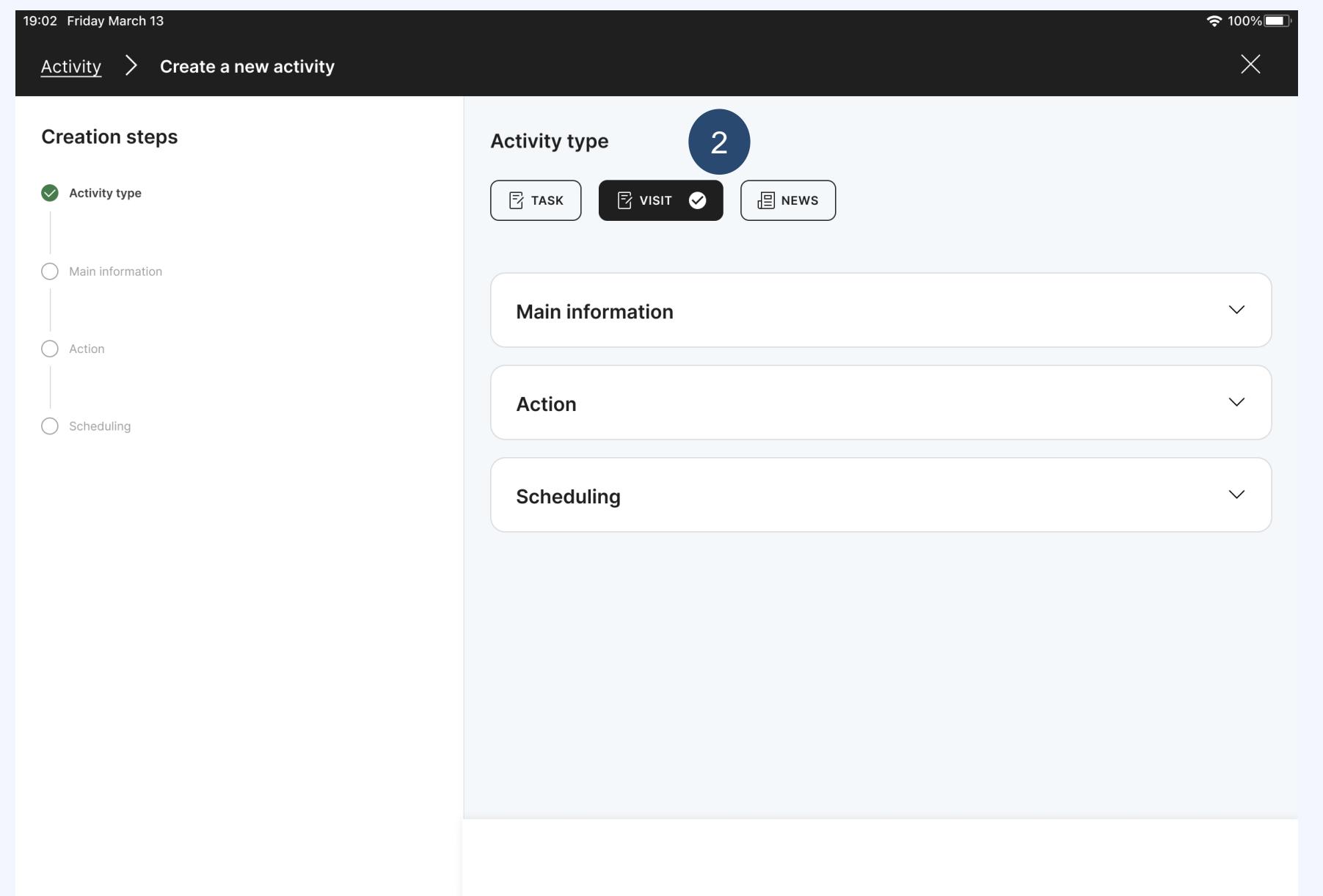
HOW TO PLAN AN AUTO-VISIT

Start by filling the main information of the visit.

1 Insert the project Title

2 Select the store in which you are going to execute the visit

3 Write information about the visit

4 Click here to add attachments (images, icons, tables, links and more)
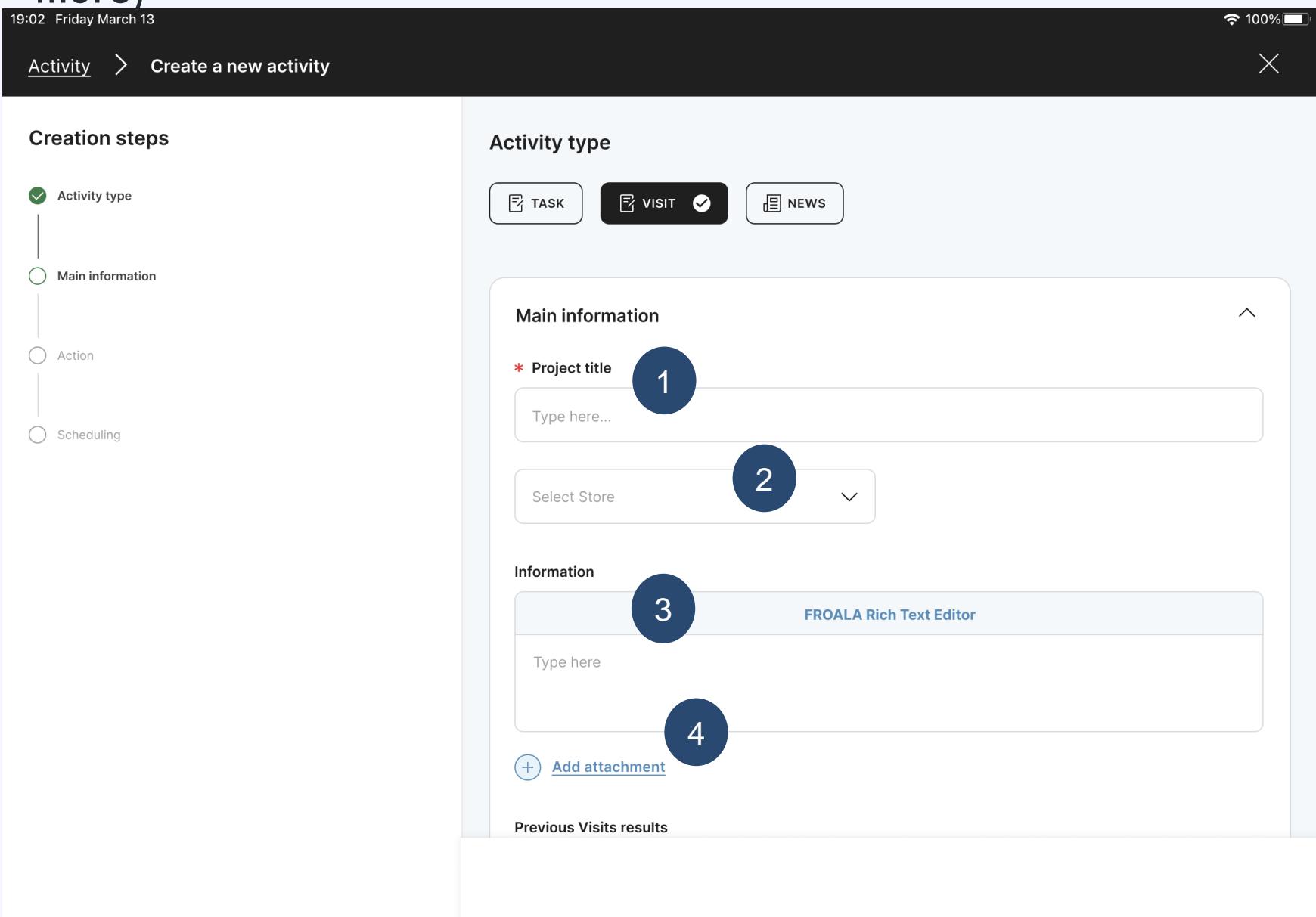
5 Click here to see previous visits results

6 Insert the goal of the visit

7 Flag "Remote visit" if you want to execute a remote visit

8 Click here to open the Global Retail Store Dashboard and see the main KPIs related to your stores

HOW TO PLAN AN AUTO-VISIT

Continue by filling the information of the action and scheduling sections.

1 Select the list of surveys you are going to execute during the visit. The average time needed to complete the survey is indicated.

*Surveys are created centrally through SAP Survey QUALTRICS by Store Operations.

2 Schedule the visit on the basis of your needs.

3 You can also set this activity as recurring.

HOW TO EXECUTE AN AUTO-VISIT

1 Click on an open visit from the activity section.

2 Then, click on "survey"

HOW TO EXECUTE AN AUTO-VISIT

1 This bar shows the survey completion percentage. As you answer the questions the bar advances.

**2** You can find different types of questions, such as open-ended questions, multiple choice, etc.
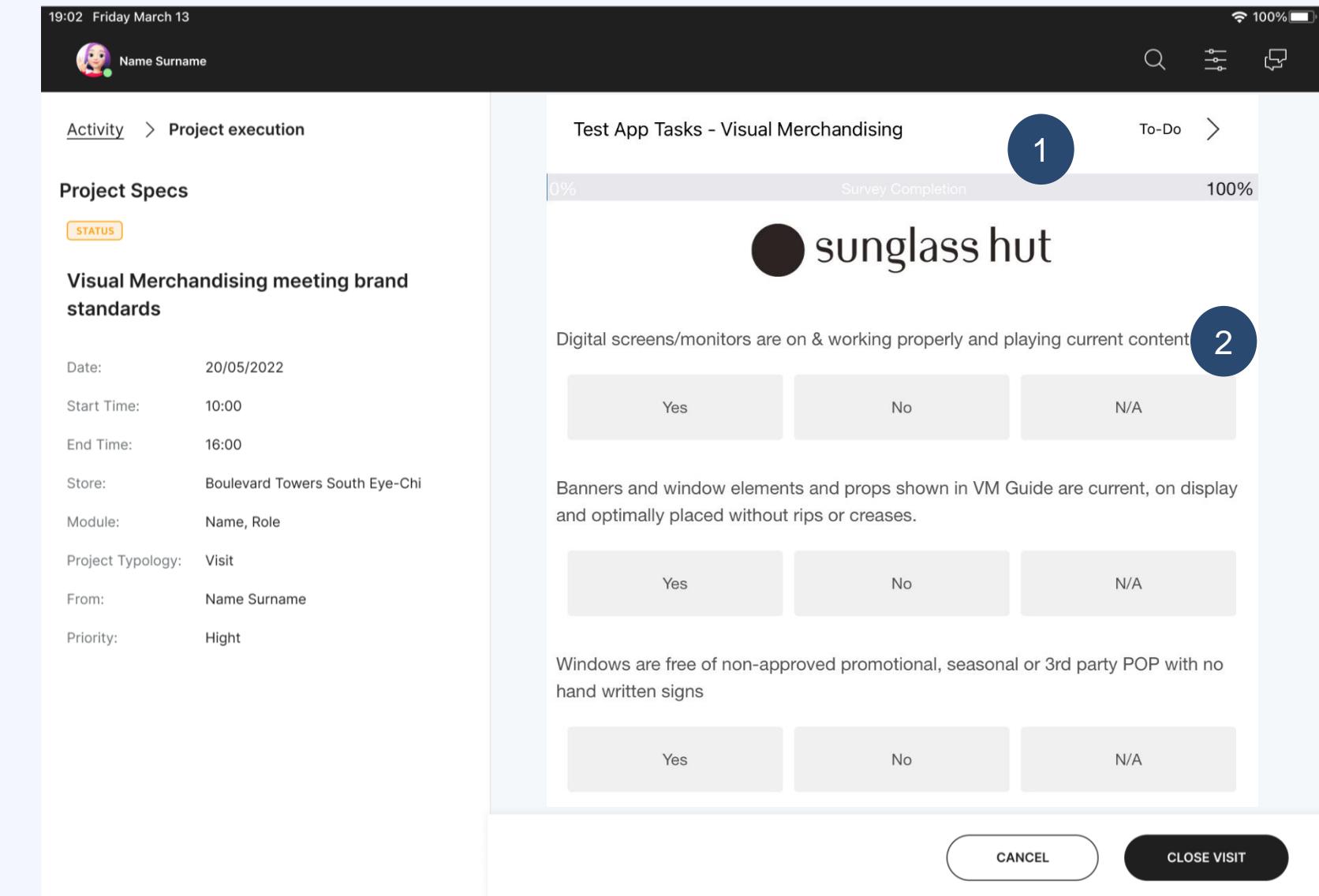
HOW TO DELETE OR EDIT AN AUTO-VISIT

1 At the end of the survey, this screen will appear.

2 If you click on "options", you can choose to cancel or edit the visit.

3 If you click on "edit", you will go back to the surveys questions and you will be able to modify the answers.
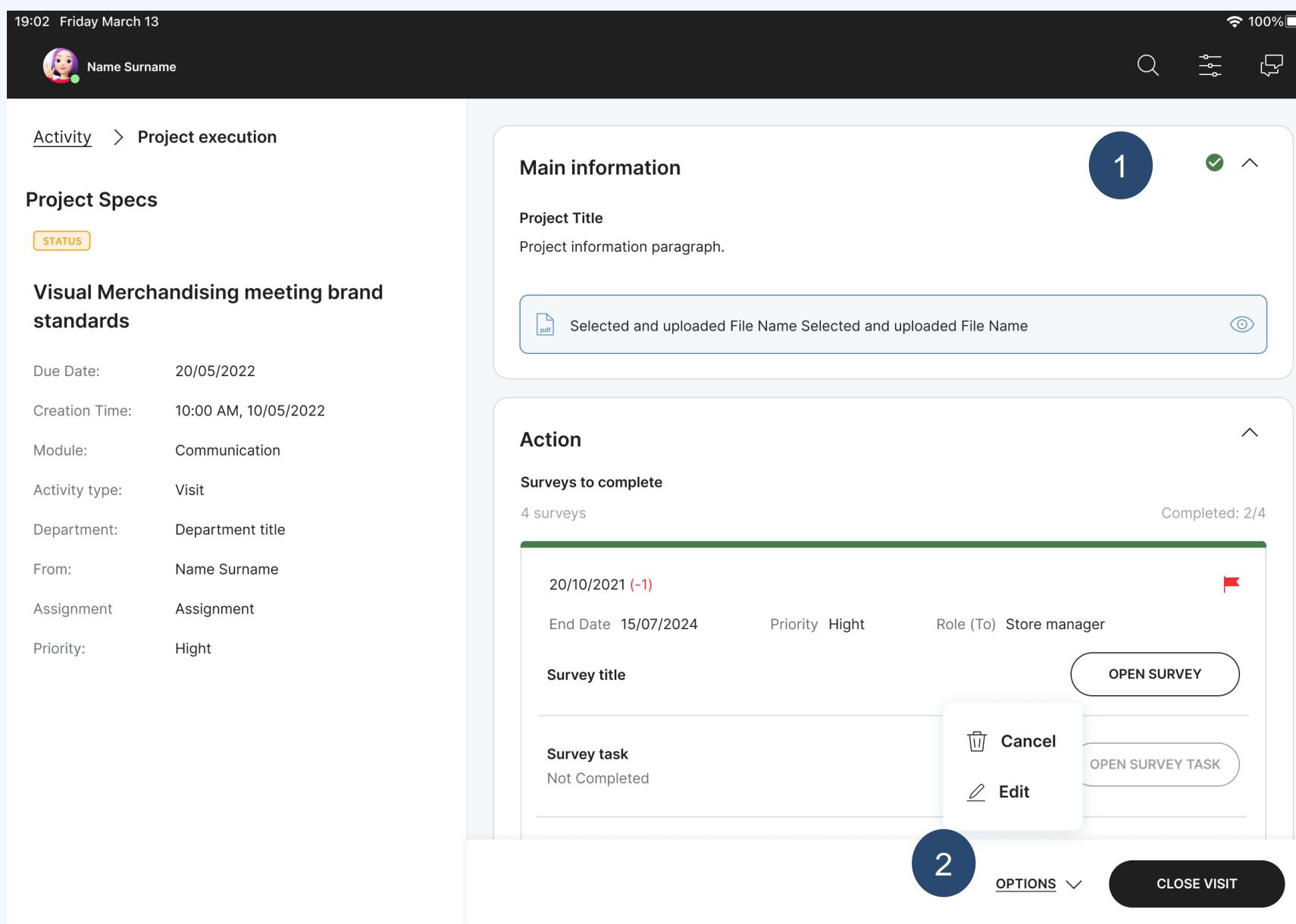
4 If you want to delete a visit, it is mandatory to indicate:

- **MacroReason:** Visitor Reason / Store Reason
- **Reason:** Illness / Urgent Personal reasons / SVT entry error / Others
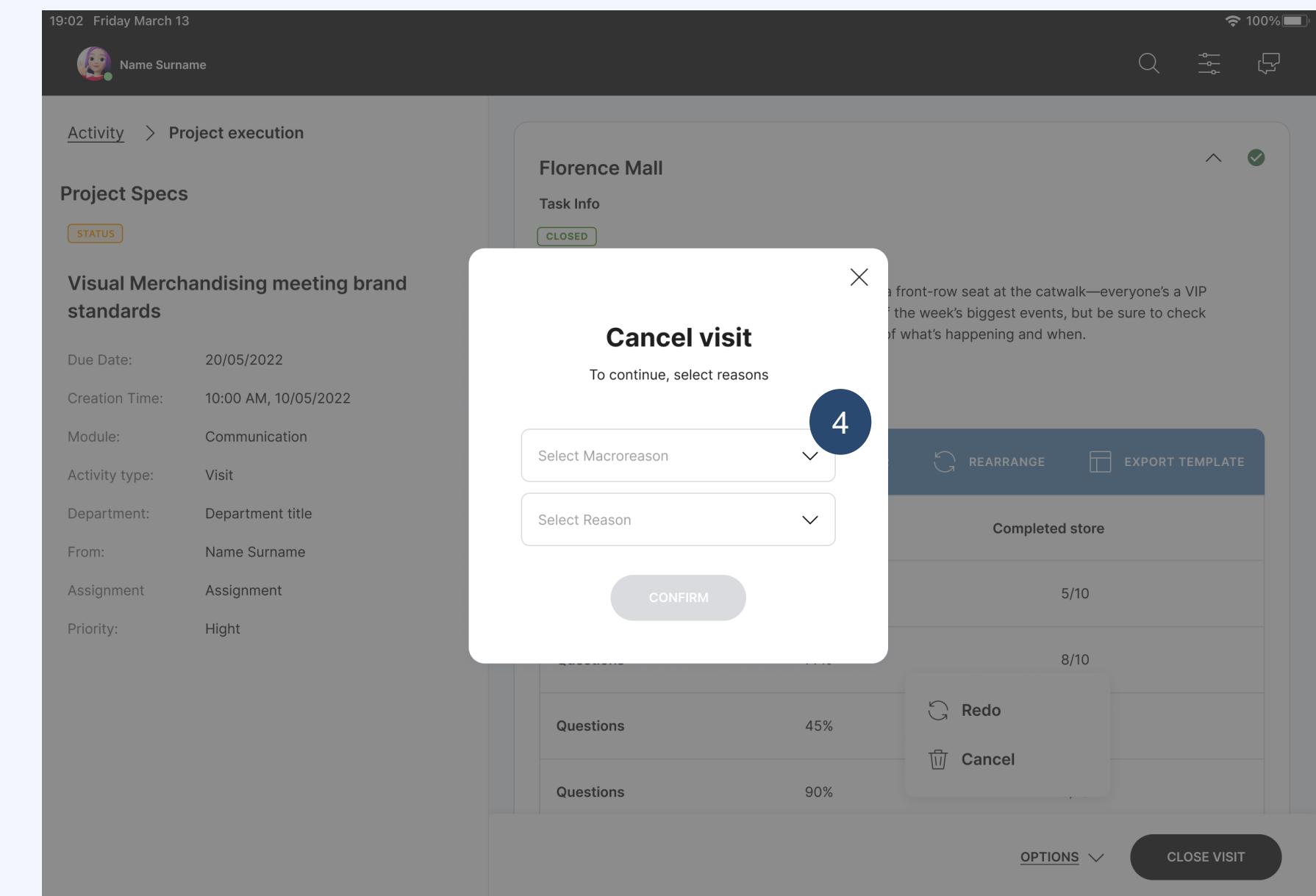
HOW TO CLOSE AN AUTO-VISIT

1 Once you close the visit, it will no longer be possible to edit or delete it.
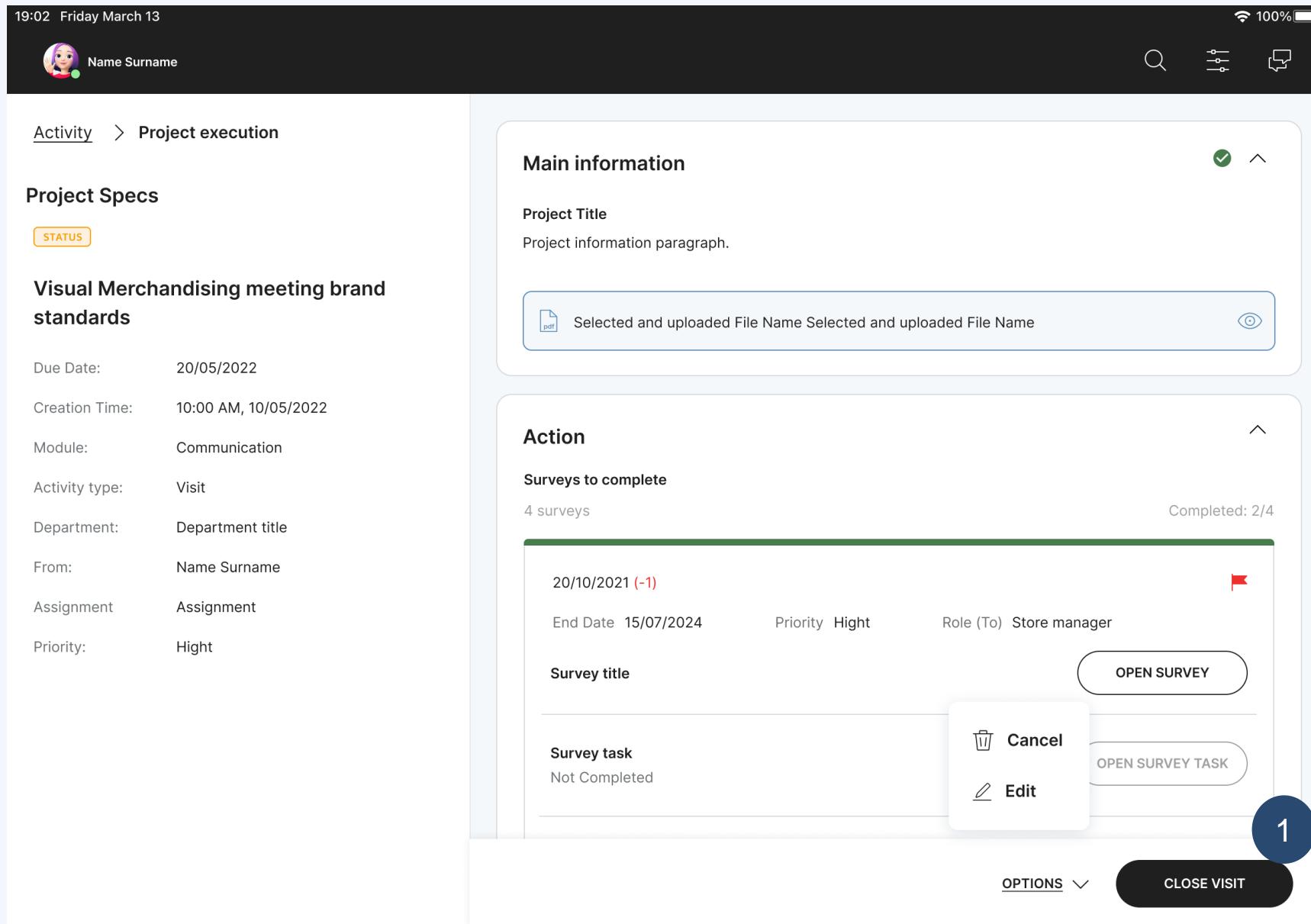
2 Click on Conclude to confirm your choice.

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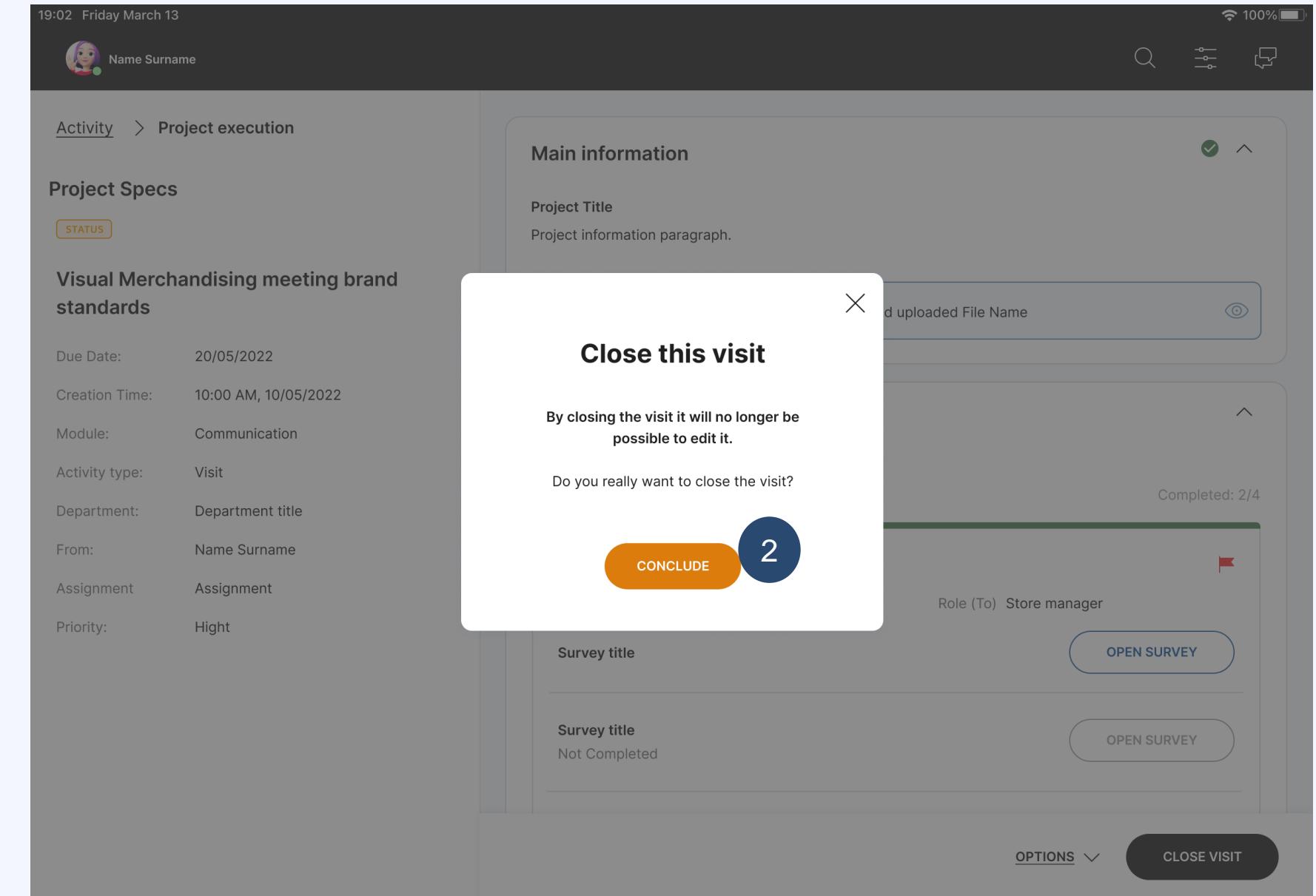
VISIT RESULTS

1 At the end of the visit, you have the possibility download and share the collected information (answers, scoring, images)
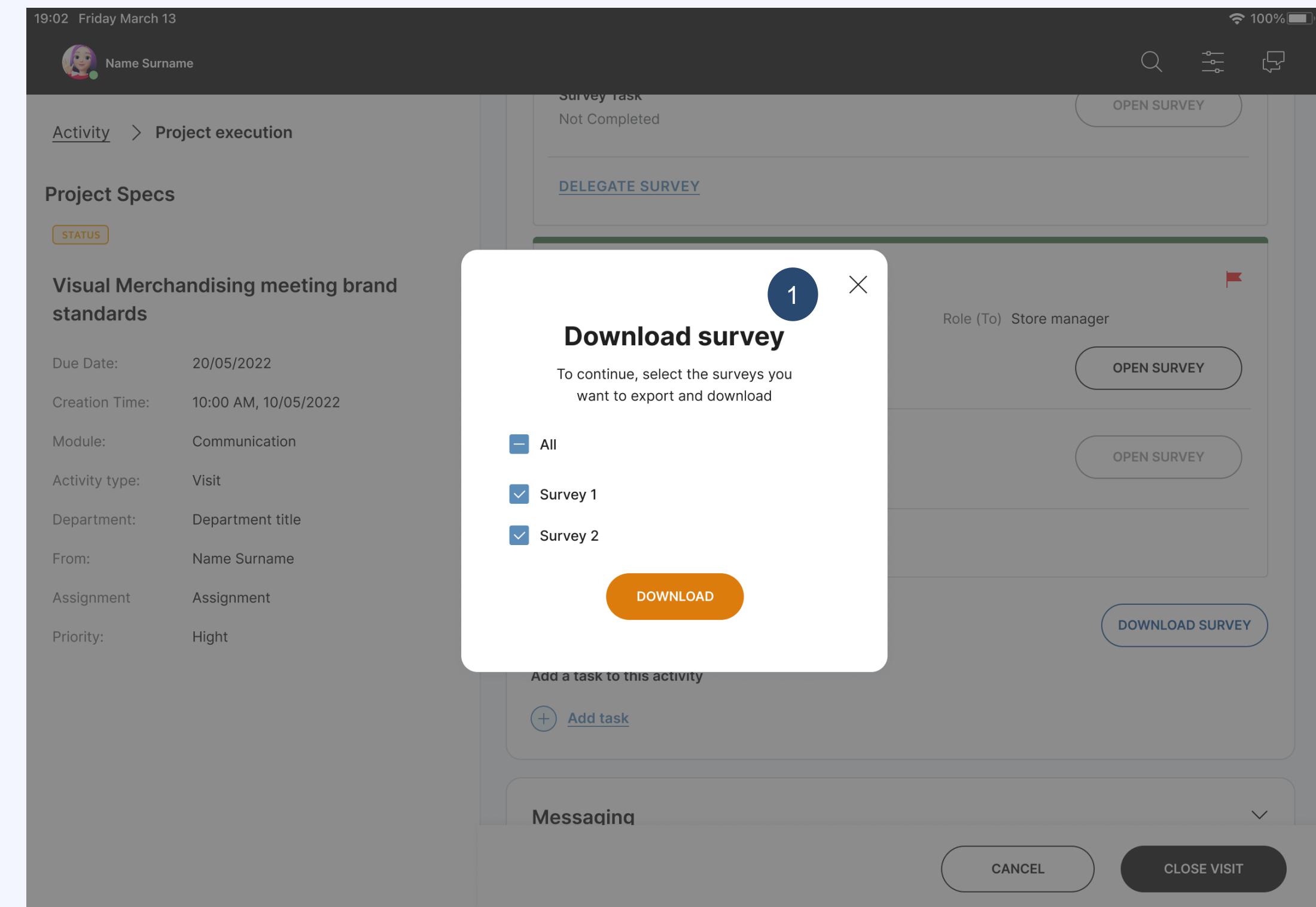
# HOW TO COMPLETE A SURVEY TASK OR A SERVICE REQUEST TASK

Survey tasks and service request tasks are created to require stores to perform actions such as answering project questions and completing tasks.

1 From the Home Page, click on the service request/survey task from the list of activities, from the Calendar or from the Activity section. Those types of tasks (survey task and service request task) will be assigned to all the people who work inside the store. The first person who accepts the task will be responsible for its execution.
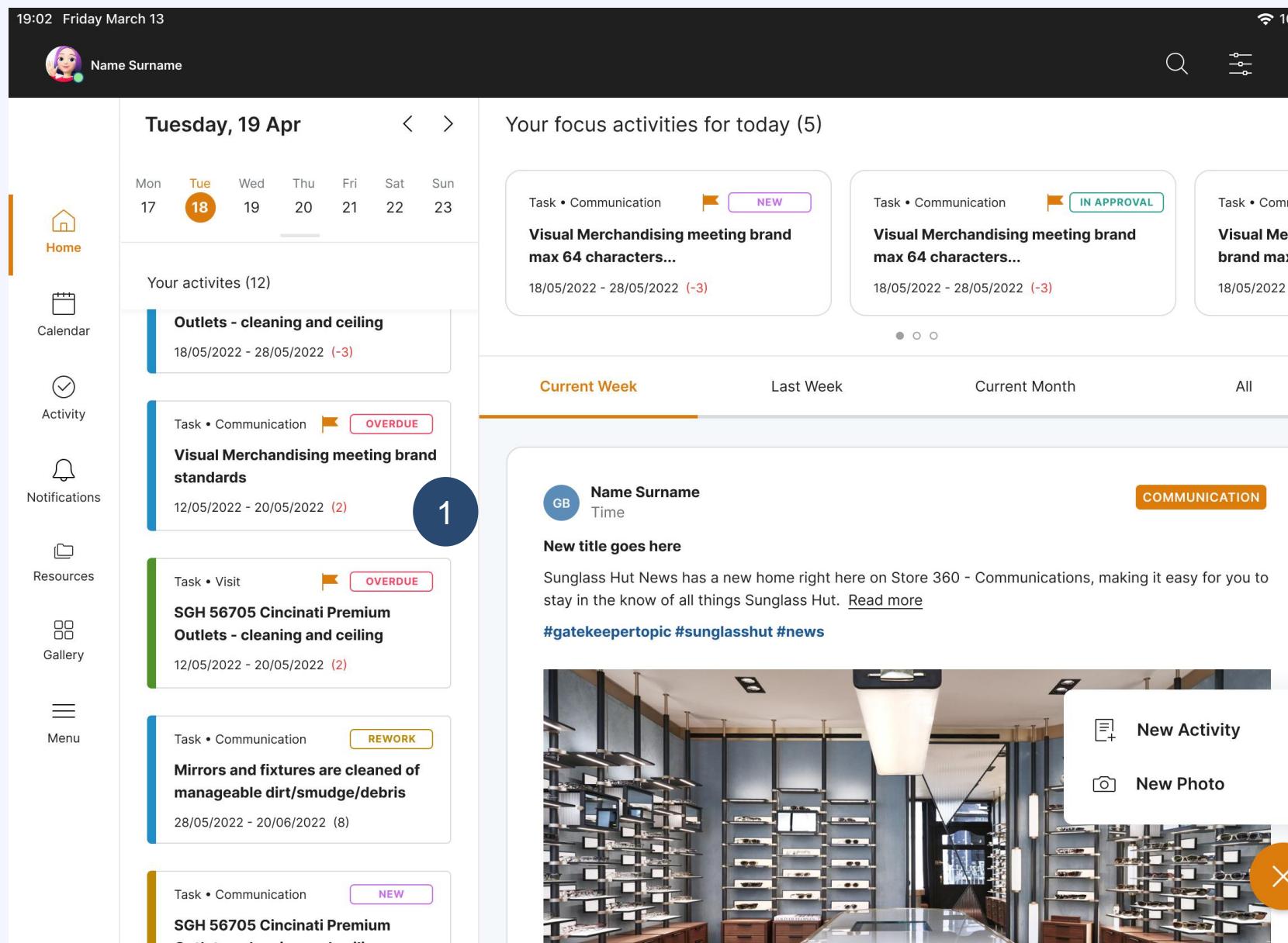
2 The Project Task Page shows its Main Information and actions to be performed.

3 Click on **'Accept Task'** to take in charge the task or 'Do not accept' to refuse the task
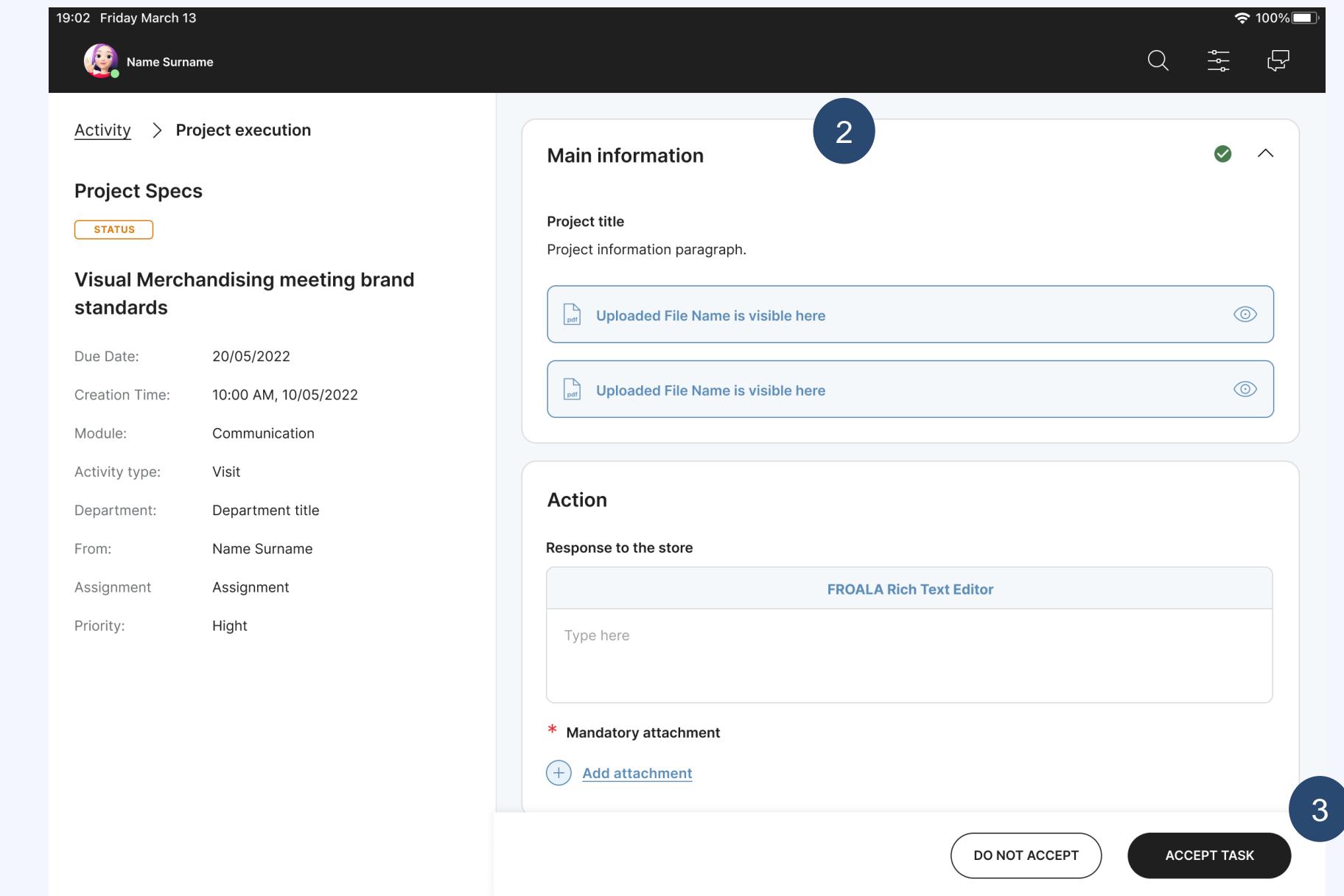
HOW TO COMPLETE A SURVEY TASK OR A SERVICE REQUEST TASK

4 Once you have accepted the task, click on **'Action'** to open the section
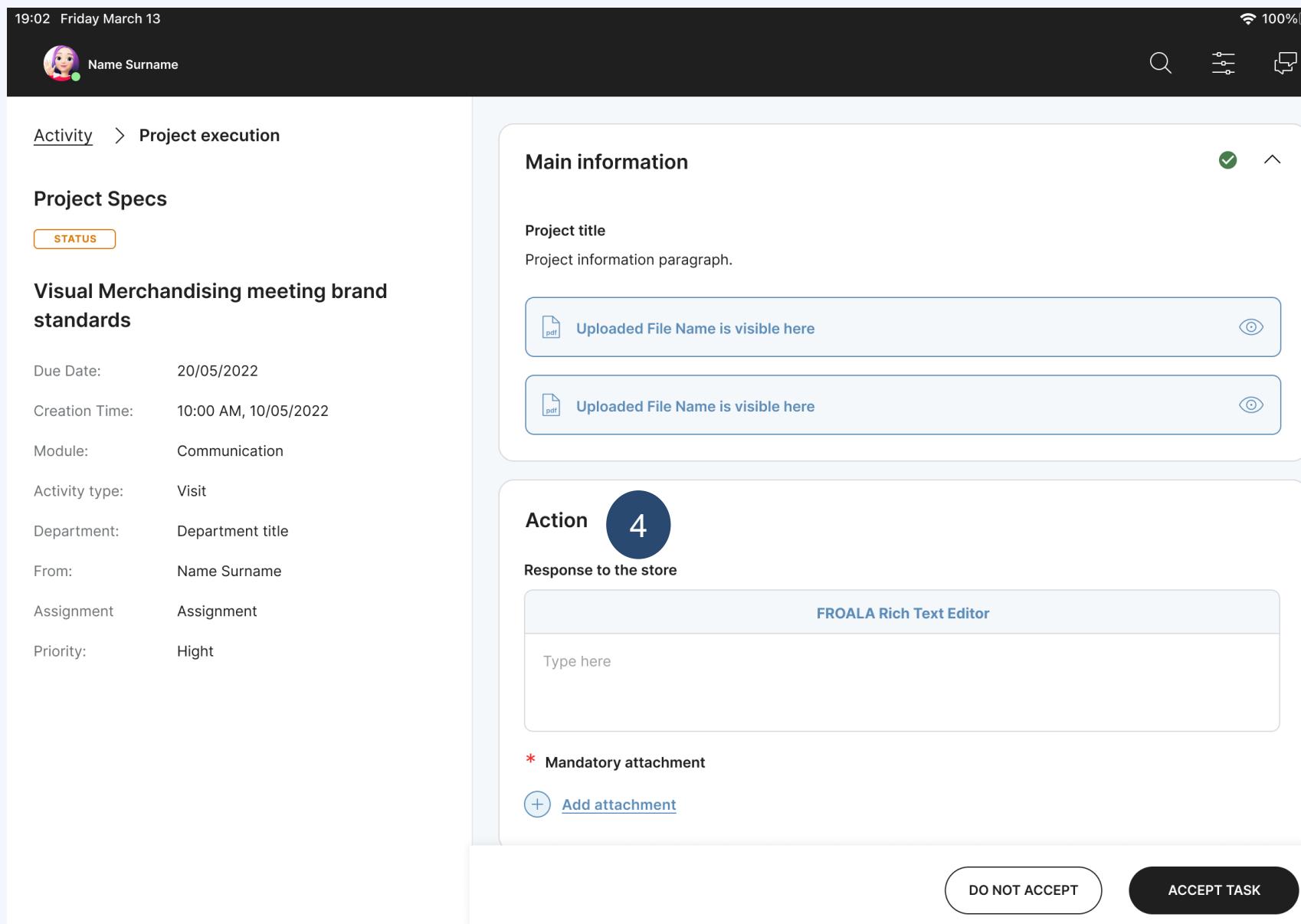
5 Answer all questions, and execute all the required actions. Executed actions are marked with a green progress bar. You may be asked to upload files in order to complete a question.

6 If there are no actions, you can complete the task simply inserting a message in the text box that is part of the action section.
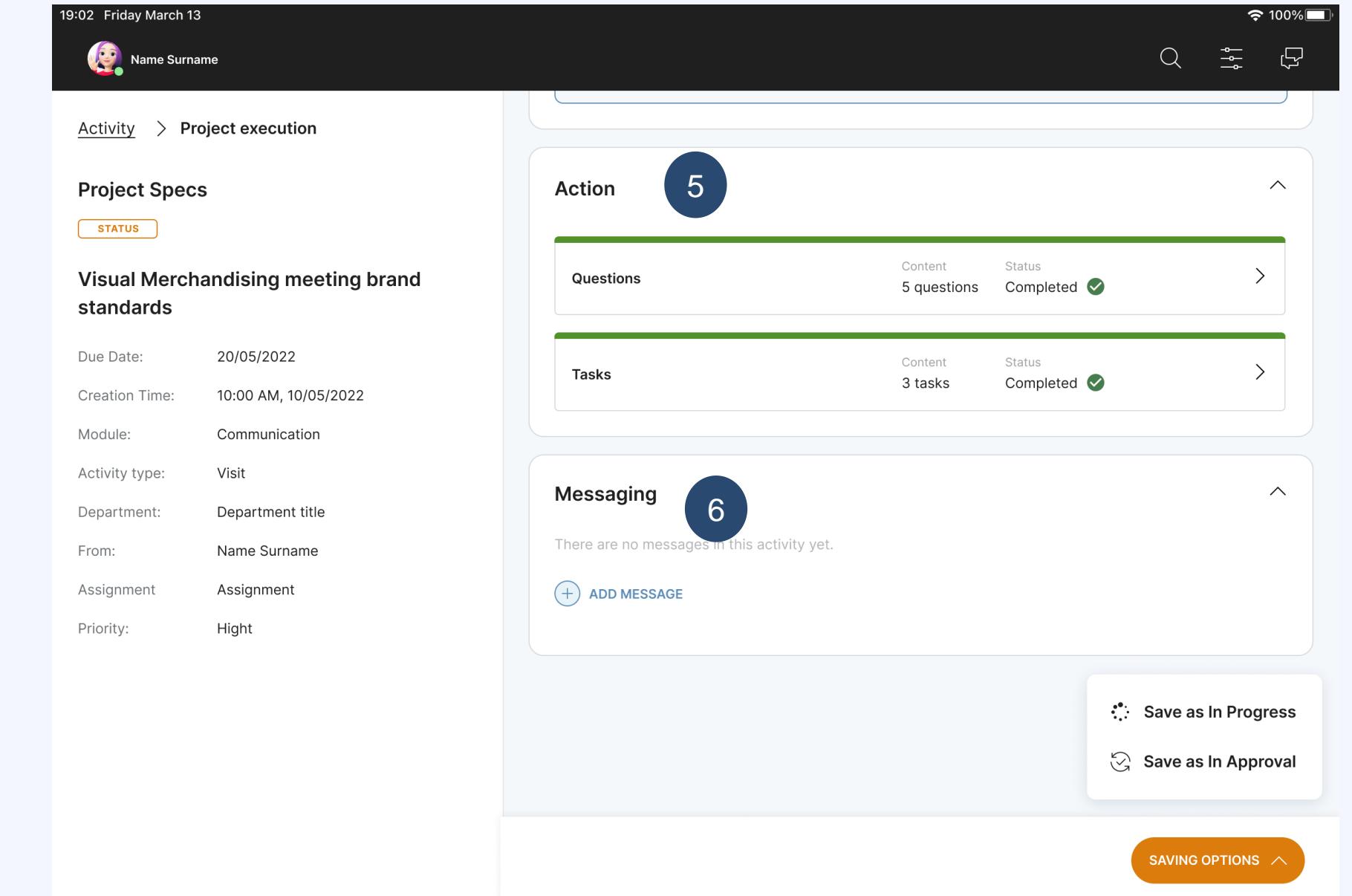
HOW TO COMPLETE A SURVEY TASK OR A SERVICE REQUEST TASK

7 Once you have completed all the the actions, click on the saving options.

Click on «Save as in Progress» if you need to continue to modify the task

Click on «Save as in Approval» if you have completed all the activities. In this case the approver will receive a notification to approve the task.

HOW TO REASSIGN A SURVEY TASK OR A SERVICE REQUEST TASK

In case you don't want to execute the task, click on «Reassign» and follow these steps:

1 Click on «Reassign»

2 A pop up notification will appear, where you have to specificy which project you are going to reassign and to which function

# HOW TO REASSIGN A SURVEY TASK OR A SERVICE REQUEST TASK

3 Select the Role Reassignment such Store Associate.
Below you can visualize the Reassignment history.

4 Select the Name and the Surname of the assignee

Select the Type of the Reassignment inbetween:

5 **Cumulative Reassignment:** the task can be executed from both the original and the new assignee.

6 **Substitutive Reassignment:** the task can be executed by the new assignee

7 Click on «Continue»

HOW TO REASSIGN A SURVEY TASK OR A SERVICE REQUEST TASK

8 To conclude the reassignment, enter a reason for the reassignment

**9** Click on Confirm to reassign the task
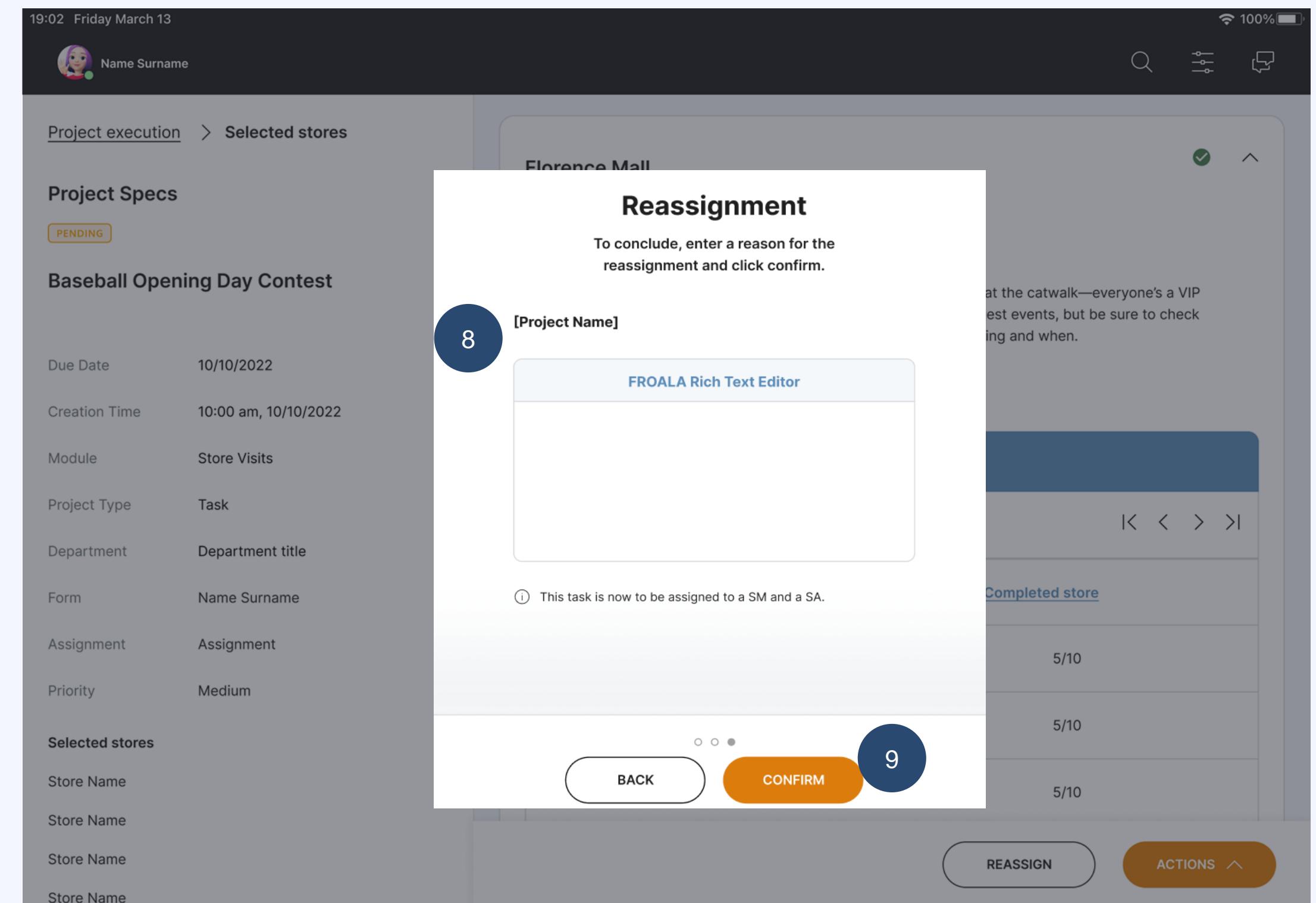
RESOURCES

HOW TO OPEN A DOCUMENT

1 From the side bar, click on the Resources section

2 Click on Documents folder type, that contains all the folders and relative sub-folders

3 Click on a sub-folder

**4** You can sort by alphabetical order, last updated, most viewed and highest rating
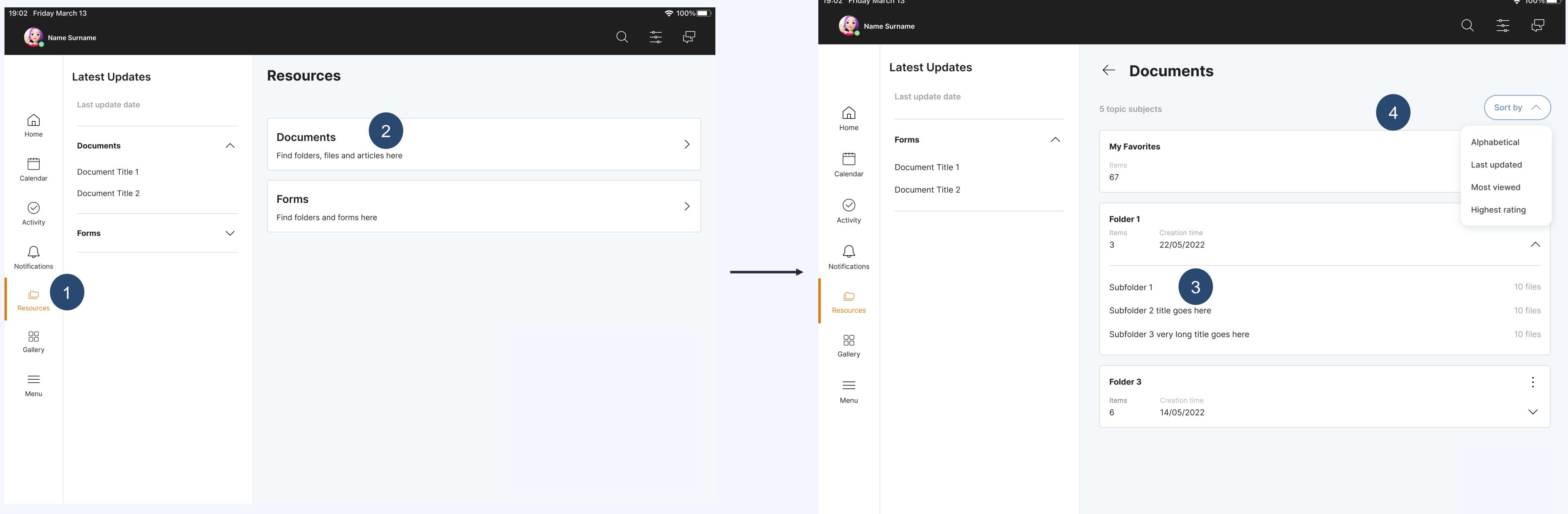
HOW TO OPEN A DOCUMENT

3 The list of documents related to the clicked folder appear

4 Click on the three dots to download it or copy the link
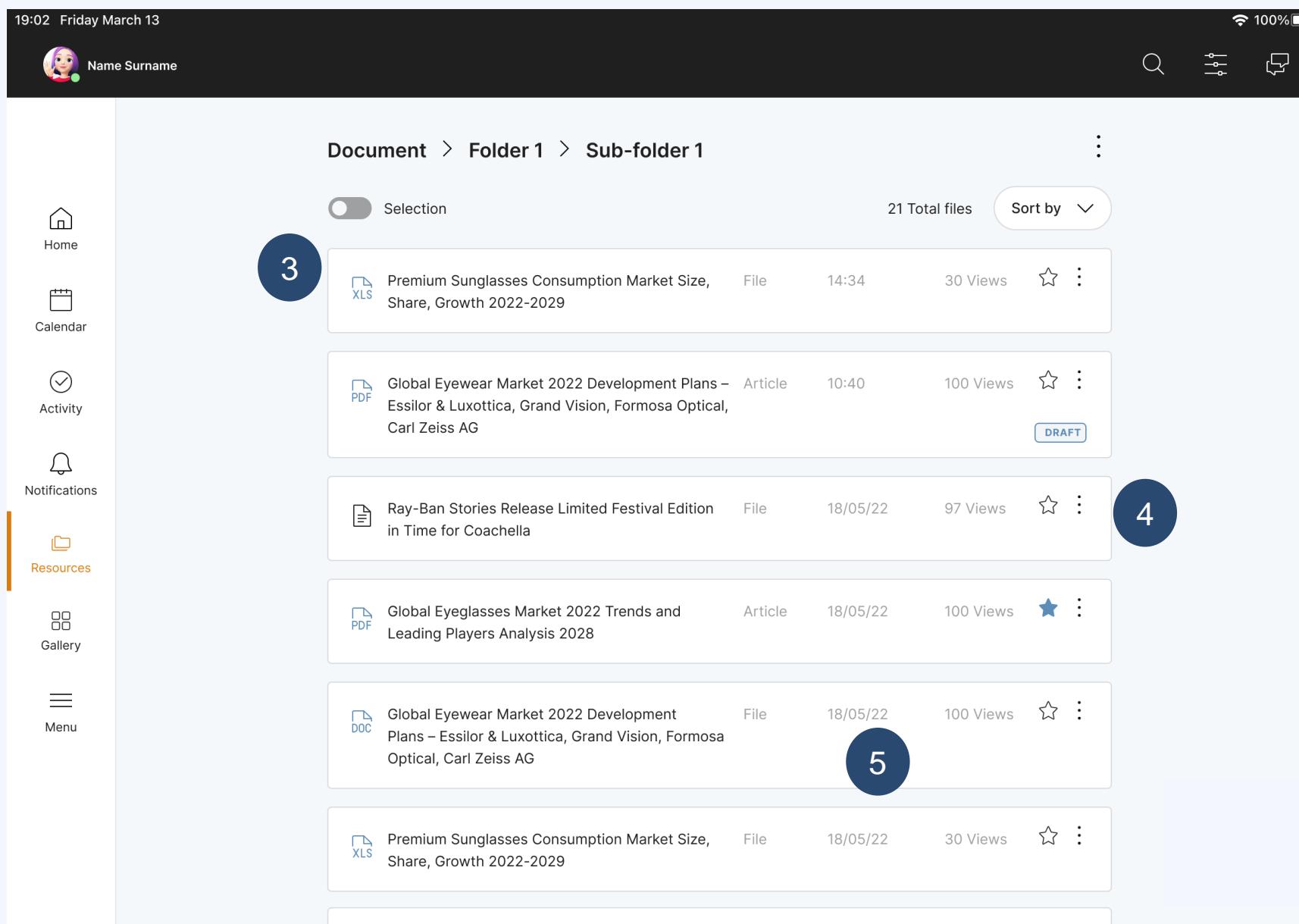
5 Click on the document to open it

**6** Click on Comments and Rating to leave a comment and express appreciation with like or dislike
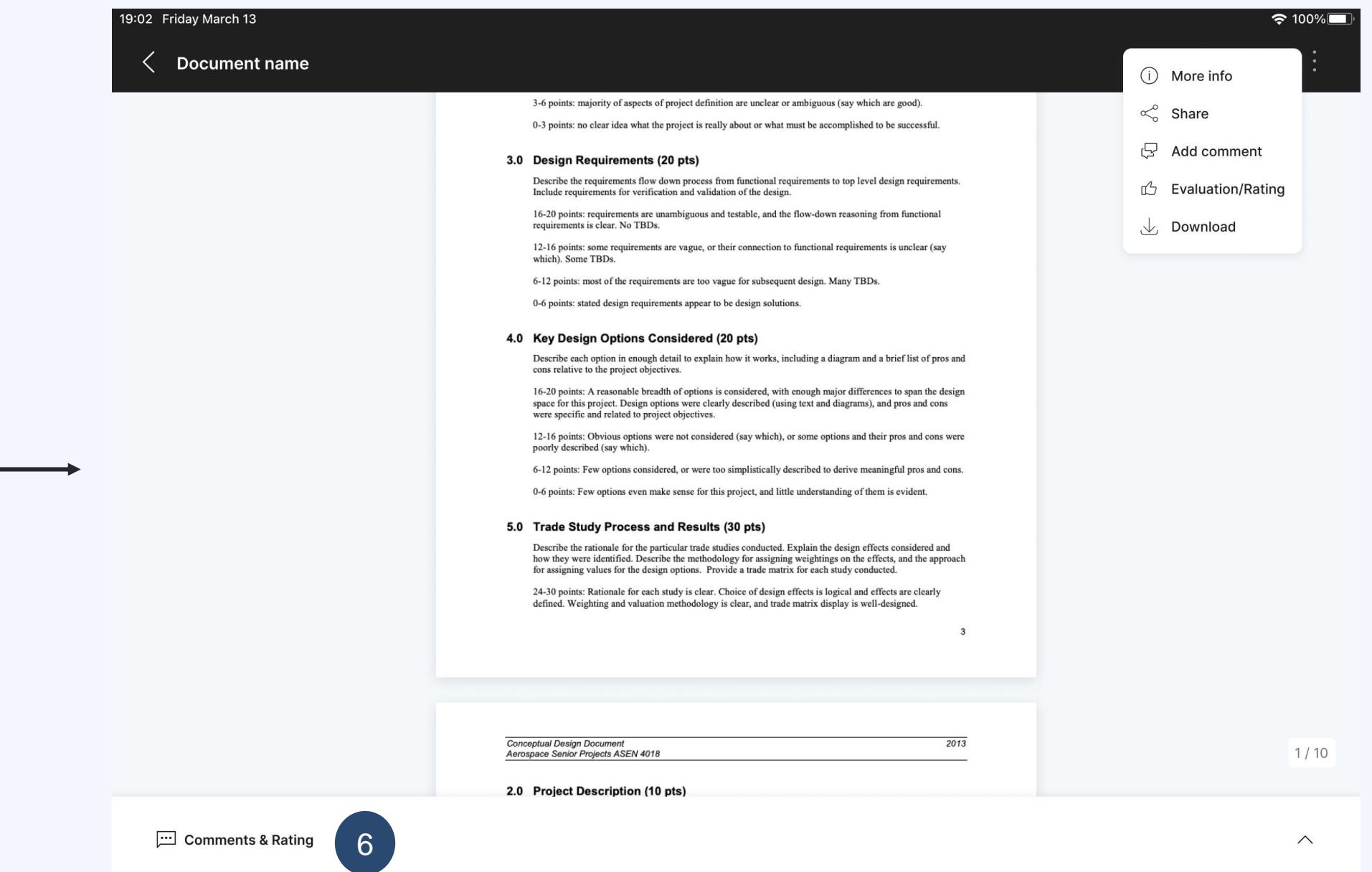
HOW TO COMPLETE A FORM

1 Click on Forms folder type, that contains all the folders and relative sub-folders

2 The bar shows the Form's progress and status
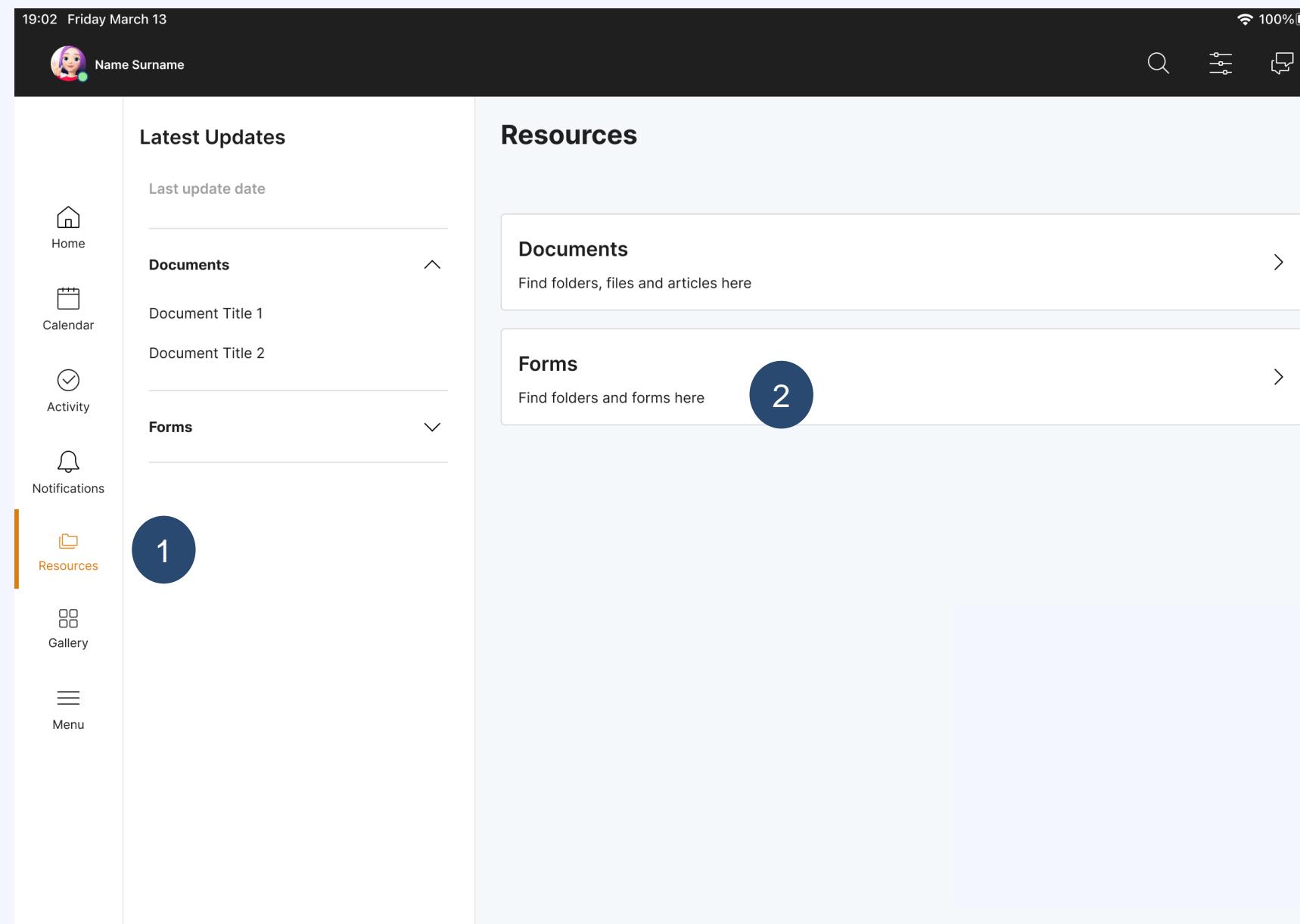
3 Click on the arrow to complete the form

4 The return icon let you re-do the Form
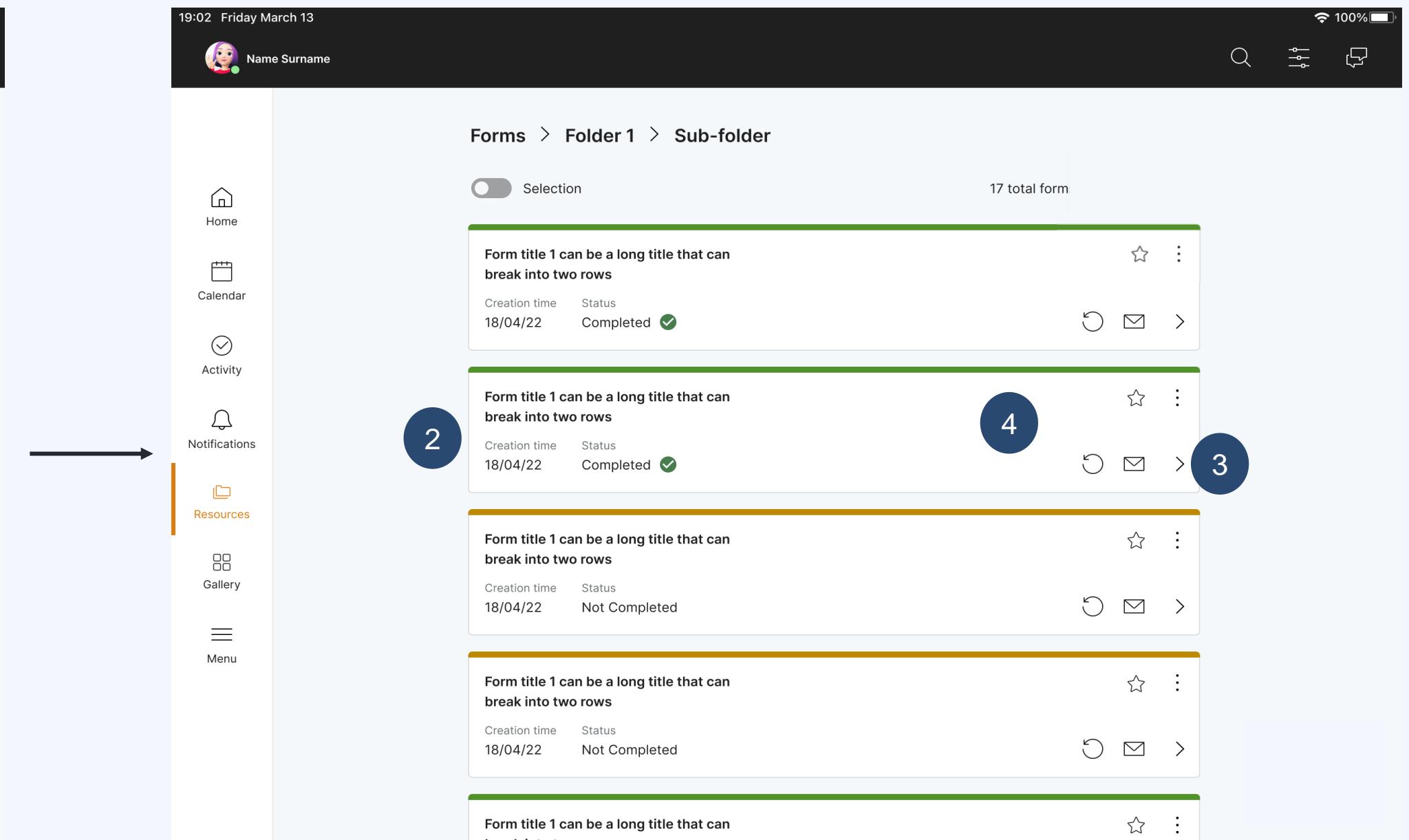
HOW TO COMPLETE A FORM

5 Answer all questions

6 Click on the arrow to proceed

7 A message will confirm you've filled the form. Click on conclude to close the form

8 Once you close it, you land in the email sending page. Insert the email from which the form will be sent

9 Add a subject and body of the email

10 Click to send the email

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