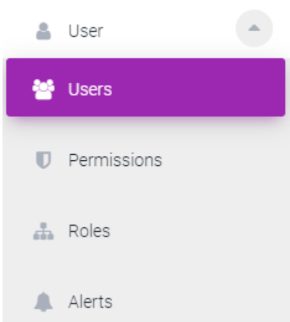
Quickstart Guide

Step 1: Adding Users to the system

Users are the people who have access to the backend software.



a. Set Up User Roles
    i. Select the drop down for “User”
    ii. Select “Roles” and add/edit role names
b. Set up user permissions
    i. Select the drop down for “User”
    ii. Select “Permissions”
    iii. Check on the permissions desired for each role
c. Add Users
    i. Select the drop down for “User”
    ii. Select “Users”
    iii. Add/Edit/Reset/Delete any users in the system

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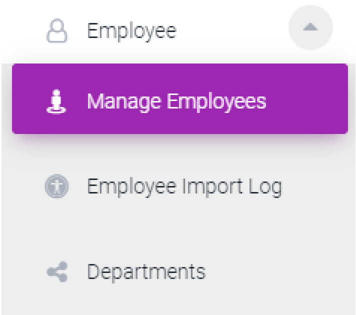
Step 2: Add/Edit Employees

Employees are the people who can dispense items from the machines.



a. Add/Edit employees
   i. Select the drop down for “Employee”
   ii. Select “Manage Employees”
   iii. Add Individual/Import List/Edit/De-Activate any employees in the system
b. Add/Edit departments
   i. Select the drop down for “Employee”
   ii. Select “Departments”
   iii. Add/Edit/Delete any departments in the system
c. Set up Product Restrictions (Product Restrictions default to May Not Dispense when initially setup or when a new product is added to your product list, so you will need to change this to the restrictions you want in place)
   i. Select the drop down for “Employee”
   ii. Select “Departments”
   iii. Click on the Product Restrictions icon for the department you are wanting to set restrictions for and make adjustments (This can also be done in a Bulk Assign for Departments)
d. Set up User Limits if desired
   i. Select the drop down for “Employee”
   ii. Select “Departments”
   iii. Click on the User Limit icon for the department you are wanting to set User Limits for and add/edit the user limits (This can also be done in a Bulk Assign for Departments)

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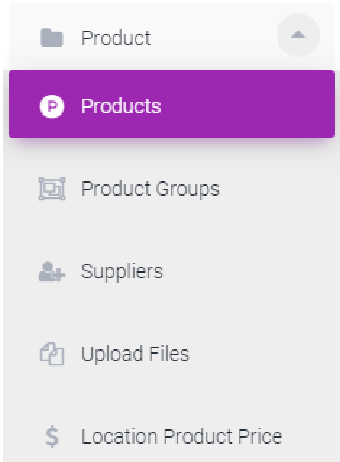
Step 3: Products



a. Review Products
   i. Select the drop down for “Product”
   ii. Select “Products”
   iii. Review list of Products, verify names, pricing and attributes are correct
b. Add/Edit Products
   i. Select the drop down for “Product”
   ii. Select “Products”
   iii. Make sure products are checked on for the following if desired:
      1. Offline
      2. Lot Tracking
      3. Expiration Tracking
      4. Dual Validation

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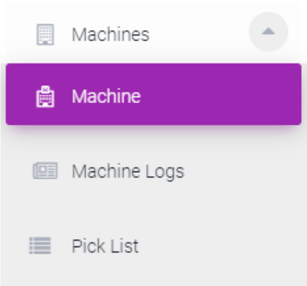
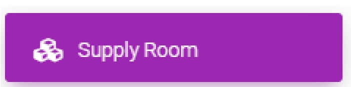
Step 4: Machine Planogram Setup



a. Review Planogram
   i. Select the drop down for "Machines"
   ii. Select "Machine"
   iii. To access the machine planogram click on the Planogram icon (The Eye) for the machine you are wanting to view
   iv. Verify your selections contain the appropriate products
b. Set Product Levels
   i. Critical Level, Low Level (to allow you to use alerts)
   ii. Par Level and Max Depth (for picklists and reports)

Step 5: Supply Room – If managing supplies this way



a. Adding a Supply Room
   i. Select "Supply Room"
   ii. Click "Add Supply Room" and enter your Supply Room Name and Location
b. Receiving Product into the Supply Room
   i. Select "Supply Room"
   ii. Click on the Receive icon for the Supply Room you are setting up
   iii. Select Product and click "Add to List"
   iv. Enter product details (Quantity, Expiration Date & Lot Number if applicable)

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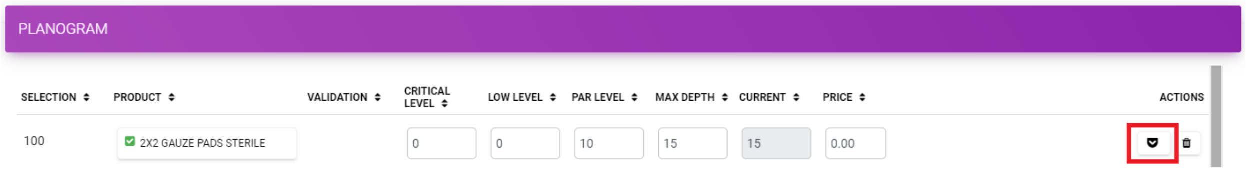
Step 6: Stocking Machine

a. Receive product into Planogram manually

i. Select the drop down for “Machines”

v. Click on the Planogram icon (The Eye) to access the machine planogram you are wanting to view

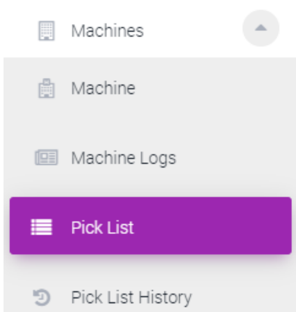
ii. Click on the Receive icon under Actions



iii. On the Receive Product tab, enter product details (Quantity, Expiration Date & Lot Number if applicable)

iv. Save Planogram

b. Receive product into Planogram via Pick List



i. Select the drop down for “Machines”

ii. Select “Pick List”

iii. You will have the option to use a Pick List (with Supply Room) or Pick List – W/O Supply Room.

iv. Select your Account, Location or Machine

Creating a Pick List for Account will restock all machines under that account

Creating a Pick List for Location will restock all machines at that location – You can then select a specific machine if you want to be that specific

v. Select your Fill Level, fill to Par or Max level

vi. Click Generate Pick List

vii. Select View to review product quantities, select Accept to add quantities to machine/s

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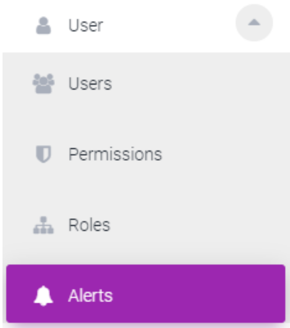
Step 7: Alerts



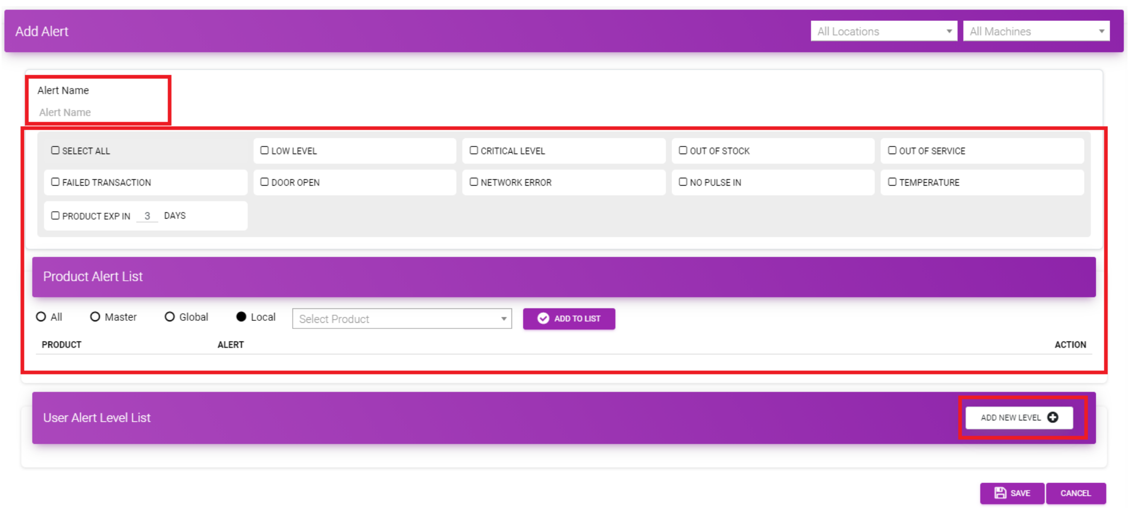
a. Set Up new Alerts

   i. Select the drop down for "User"

   ii. Select "Alerts"

   iii. Click Add Alert

   iv. Complete alert setup



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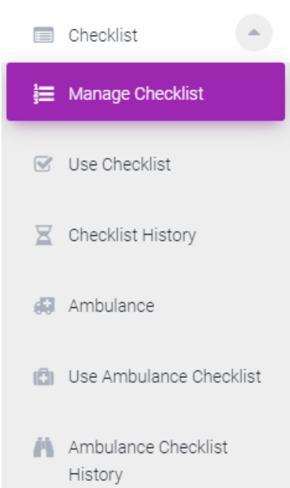
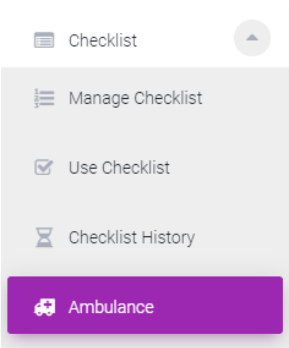
Additional Features

Checklist

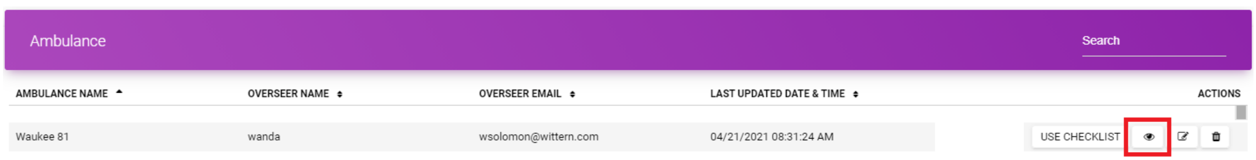


a. Set up Checklists
   i. Select the drop down for "Checklist"
   ii. Select "Manage Checklist"
   iii. Click Add New
   iv. Complete Checklist Name, Description, Questions, and User information

Ambulance Checklist



a. Set up Ambulance
   i. Select the drop down for “Checklist”
   ii. Select “Ambulance”
   iii. Click Add New
   iv. Complete Ambulance Name, Overseer Name, Overseer Email, and User information and save
b. Set up Ambulance Checklist
   i. On the Ambulance page, click the Ambulance Checklist icon to create your Ambulance Checklist (The Eye)



   ii. Complete Checklist information, including Compartments, Products and Par Levels/Status

Reports

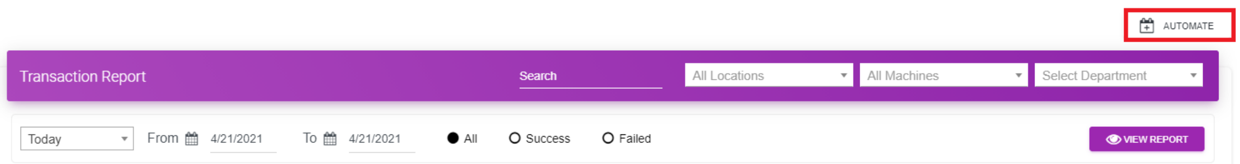
There are many reports available under the Reports drop down

a. Run Report
   i. Select your Report type
   ii. Complete report fields to view report
   iii. Reports can be exported to PDF or Excel, and printed

Automated Reports

Select Reports have the capability of being automated to be emailed to users daily, weekly or monthly.

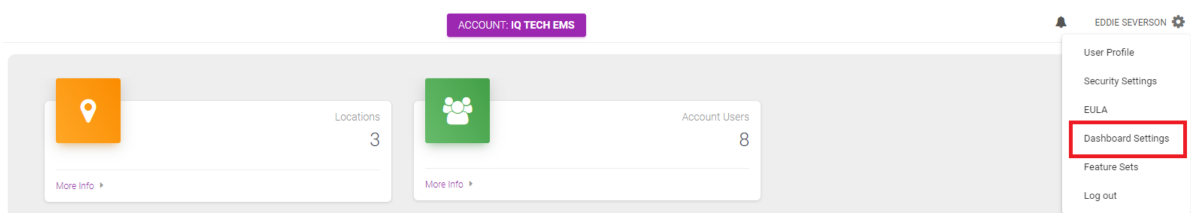
a. Set up Automated Report
   i. Select your Report type
   ii. Click Automate



   iii. Complete Frequency, At time, Automate Name, Document Time, Time Zone and Email information

Dashboard

Users have the ability to customize their dashboard for quick access to select features



a. Customize Dashboard
   i. Click the Gear Icon next to your UserName
   ii. Select “Dashboard Settings”
   iii. Check all the features you would like to have appear on your dashboard and save

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Report an Issue

a. Report Issue
   i. In the bottom left corner of your window screen select “Report Issue”
   ii. Complete report information, including machine Serial Number, Frequency of Issue, Type of Issue, Type of Solution
   iii. Provide a detailed explanation of the issue

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