

Quick Start Guide

Welcome to the ShelfX family!



shelfx

Internet Connectivity

What you will need

Power Source

Internet: Ethernet, Cellular or Wi-Fi

Tablet/Smart Phone/Computer



Tablet Connectivity



Step One: Connect fridge to power source.



Step Two: Connect fridge to Internet.

There are two options for Internet connectivity: wired and wi-fi.

-For a wired connection, connect the network Ethernet cable to the Ethernet port on the underside of the ShelfX tablet.

-For a wif-wi connection, drag down from the top of the screen and click on the settings 'gear' icon on the top right. Click on 'wi-fi' and set up the connection as you would for a laptop or cellphone.

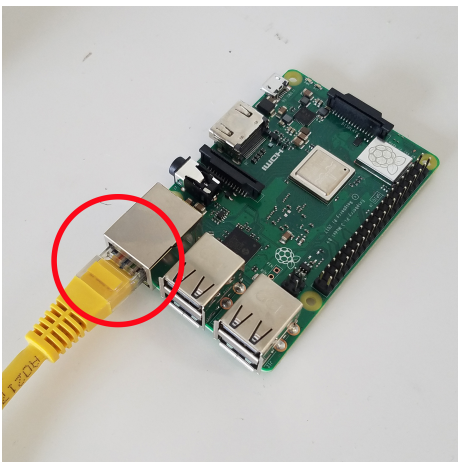
* If additional help is required, please call ShelfX at +1(855) 4-ShelfX

Note: Please refrain from placing cellular, bluetooth, or other devices inside the fridge as they can interfere with the ShelfX system.

Tablet Connection



Carino Connection



Carino Connectivity



Step One: Connect fridge to power source.



Step Two: Connect fridge to Internet.

There are two options for Internet connectivity: wired and wi-fi.

-For a wired connection, connect the network Ethernet cable to the Ethernet port on the small green CPU.

-For a wif-wi connection, connect a keyboard, mouse, and HDMI monitor to the CPU. Restart the device with these plugged in, and navigate to the top right corner of the screen where you will see a wi-fi icon. From here you can connect the device as you would for a laptop or cellphone.

Installation and Hardware

Electronics

ShelfX Hardware and Electronics

All of the electronics of the ShelfX fixture are housed in the side panel on the left of the fridge. To open, place the key inside the lock, open and rotate the lock handle, and lift and remove to open the compartment and expose the electronics.



ShelfX Tablet

ShelfX CPU

If your fridge has the ShelfX tablet, you will see the display on the front side of your side panel. This is the main CPU for the ShelfX fixture, and will require an Internet connection in order to operate. Please verify that your tablet is connected to the Internet, and that the USB cable and the power cable are securely fastened to the tablet.

Your fridge will also have a small NFC card reader on the side panel that will read the ShelfX XCards.

Carino and ShelfX CPU

ShelfX CPU

If your fixture does not have a tablet on the side-panel of the fridge, you will see a small display unit on the inside of the fridge called the Carino. This display unit is the main interface for consumers to see what they are purchasing.

The right-hand side of the Carino also has an NFC card reader, which is used with the ShelfX XCards. To use a card, just hold it up to the glass on the fixture door.

Inside the compartment with the electronics, you will see a small green board. This is the main CPU for this fixture. The SD card with the ShelfX image for the CPU is highlighted in the image on the right.



Activation

Registration

Step Three: Register for your accounts.

Go to register.shelfx.com to register a ShelfX customer account. When registering your account, please select one of the credit card processors. Open an account with the processor you chose. You will need also need to purchase a credit card terminal with a ShelfX profile through them.

The screenshot shows the 'Merchant Registration' page on the ShelfX website. The page has a light blue header with the ShelfX logo and the tagline 'ALWAYS FIRST IN LINE™'. Below the header, the title 'Merchant Registration' is followed by a welcome message: 'Welcome to ShelfX. This page is for you to create a new merchant account.' The form includes several input fields: 'Servers Location' (a dropdown menu currently showing 'United States'), '*Business Name', '*Email', '*Password', and '*Desired Company ID'. A note specifies that the company ID should be a word or short phrase (no spaces) used as a sub-domain for management portals. At the bottom, there are fields for 'Contact Name' and 'Contact Phone'.

Activating the Fixture

Step Four: Create a new location.

Before activating the fixture a new location must be created in the Xmanager App. This is done by going to: [Company_ID].shelfx.com and logging into your account. Navigate to the Locations page, select “New Location”, then enter the location information.

Detailed information about creating a new location is located on pages 10-11 of the Training Manual.

The screenshot shows the 'New Location' form within the Xmanager App. The interface has a light blue header with the ShelfX logo and the text 'XMANAGER GRAB'. Below the header, there's a navigation menu on the left with options like Home, Products, Planogram, Pick Lists, Reports, Locations, Employees, Settings, Customers, Password, Point Of Sale, Employers, and Media. The main content area is titled 'New Location' and includes a 'Test Mode' toggle. The form fields include 'Location Name', 'Address' (with a dropdown for 'Location Group' and a 'New Group' button), 'Location Description', and two 'Address' fields. A 'Back' button is visible at the bottom left.

Step Five: Enter the activation code.

On your ShelfX page, navigate to Locations. Click and confirm that the correct location is listed at the top of the page and click “Activate Fixture”.

-If the incorrect location is selected the location can be changed by clicking “Change Location” before activating.

-If the fixture is activated in the wrong location the fixture can be moved to another location by selecting “Move Fixture” in the fixture details page.

Detailed information about activating and moving a fixture location is located on page 14 of the Training Manual.

The screenshot shows the 'Activate Fixture' screen in the Xmanager App. The header is identical to the previous screenshot. The main content area is titled 'Activate fixture at ShelfX Training'. It features an 'Activation code' input field, a 'New Fixture' dropdown menu, and an 'Activate' button. A 'Back' button is located at the bottom left.

Programing

Employee Accounts

Step Six: Create employee accounts.

Employee accounts must be created in order to log into Xmanager. This is done by navigating to the Employees page and clicking “Add New Employee”. Here the employee details can be entered. An Xcard must be assigned to an employee in order to stock the fridge. There are two default employee types, additional employee types, can be created by navigating to the Employee Types page and selecting “New Employee Type”. Here you can select different levels of access for employee types, including Email Alerts about your fixtures.

Detailed information about employees and employee types is located on page 15 of the Training Manual.

The screenshot shows the 'New Employee' form in the ShelfX Xmanager interface. The form includes fields for Employee Type (set to Administrator), First Name, Last Name, Xcard Number, Badge, Email, and Set Password. There are also checkboxes for Suppliers (Beverage Supply House and Self) and a 'More' button for additional options. The left sidebar shows navigation links for Home, Products, Planogram, Pick Lists, Reports, Locations, Employees, Settings, Customers, Password, Point Of Sale, and Media.

Products

Step Seven: Create new products.

The first step of programing a new fixture is product creation. This is done in the Xmanager App accessed by going to [Company_ID].xmanager.com and logging in with an employee account. After navigating to the Products page, click “New Product”. Here product the information can be entered and saved. Clicking “More” provides access to supplementary product information as well as creating and assigning product categories.

Detailed information about Xmanager and products is located on pages 1-3 in the Training Manual.

The screenshot shows the 'New Product' form in the ShelfX Xmanager interface. The form includes fields for Name, Default Sales Price \$, and Cost \$. A 'More' button is visible, which likely leads to additional product information and category assignment. The left sidebar shows navigation links for Home, Products, Planogram, Pick Lists, Reports, Locations, Employees, Settings, Customers, Password, Point Of Sale, and Media.

Planogram

Step Eight: Assign products and stock.

First, unlock the fridge. In the Xmanager App, the Planogram page is used to assign products to specific shelves and calibrate shelves to new products. From the Planogram Summary page, select a shelf to edit, assign a product to the shelf from your product list, then click “Save Planogram”. Select the shelf again and click “Calibrate” to start the calibration tool. After all shelves have been calibrated select “Sync Fixture” from the summary page.

Detailed information about assigning products to shelves, the Planogram, and calibration tool is located on page 5 in the Training Manual.

The screenshot shows the Planogram page in the ShelfX Xmanager interface. The page displays a list of products assigned to shelves, including 'A1 0/8 Frappuccino \$4.75', 'A2 0/10 La Croix - Cran \$3.00', and 'A3 0/10 La Croix - Lime \$3.00'. There are buttons for 'Sync Fixture', 'Open Door', 'Tare All', 'Copy From', 'Copy To', and 'Download Labels Page'. The left sidebar shows navigation links for Home, Products, Planogram, Pick Lists, Reports, Locations, Employees, Settings, Customers, Password, Point Of Sale, and Media.

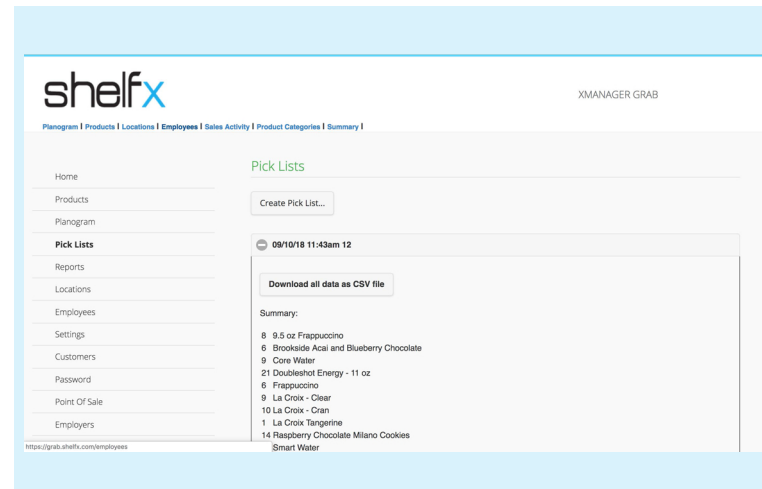
Ongoing Operations

Restocking

Step Nine: Restock the fridge.

In order to restock the fridge an employee Xcard must be waved to unlock the fridge. In the case that the product on the shelf is not being changed, additional inventory can simply be added to the fridge. If a new product is being added to a shelf it must be assigned to the shelf, saved, and recalibrated. After restocking is complete, select “Sync Fixture” from the Planogram Summary page. Pick lists can be generated in Xmanager, showing exactly what items and quantities are needed to restock a fridge.

Detailed information about restocking and Pick Lists is located on page 6 of the Training Manual.

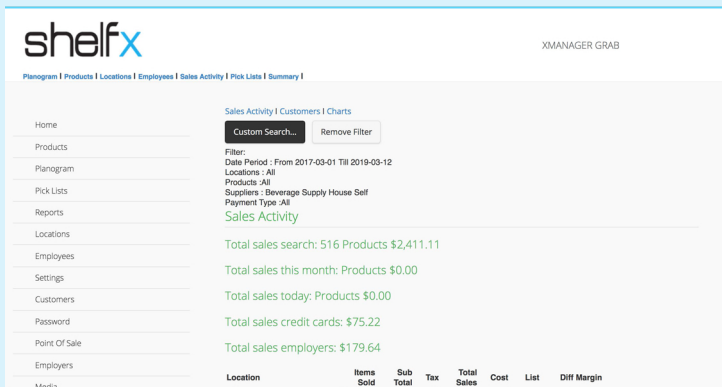


Reports

Step Ten: Review machine activity.

In Xmanager there are several different tools available for viewing and analyzing the activity of a selected fixture. After navigating to the Reports page there are a variety of reports available for Employee Activity, Sales Activity, Inventory, PDF Statements, Charts, and Product Analysis.

Detailed information about restocking and Pick Lists is located on pages 6-9 of the Training Manual.

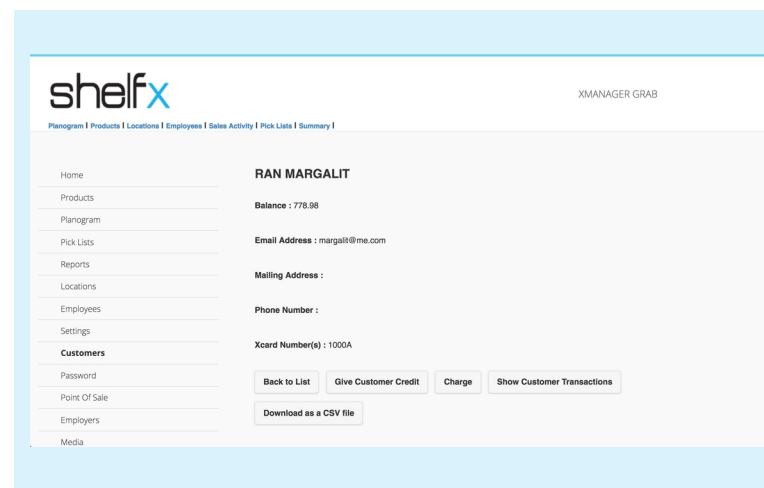


Customers

Step Eleven: Access customer information.

Customers can be searched for in Xmanager by: Name, Xcard number, Email Address, or Phone Number. Selecting the customer from the list of results allows access to customer information, transaction history, as well as the ability to charge or credit a customer. Specific items can also be be refunded directly from the Customers Transactions list.

Detailed information about customer refunds is located on page 16 of the Training Manual.



+1-855-4-ShelfX

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