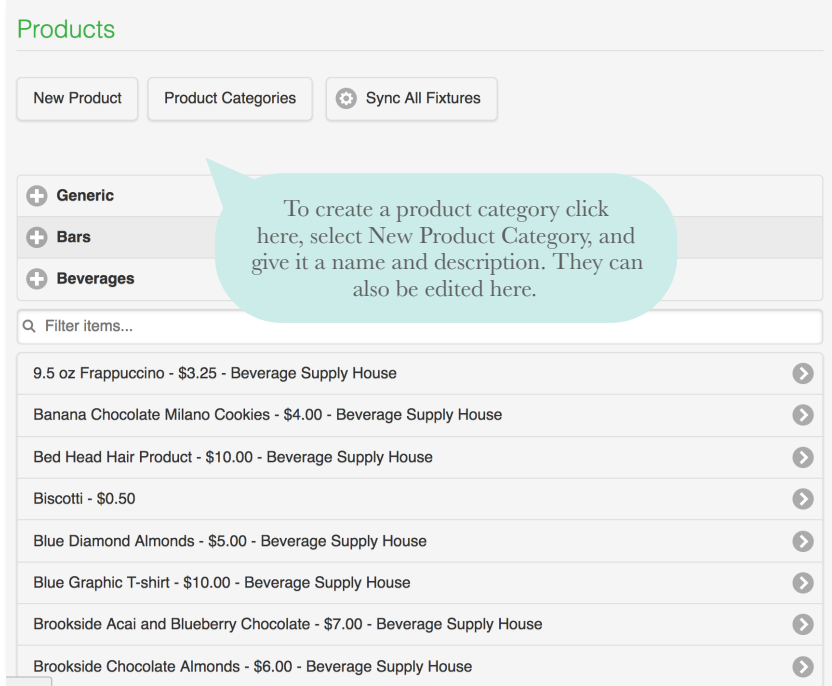
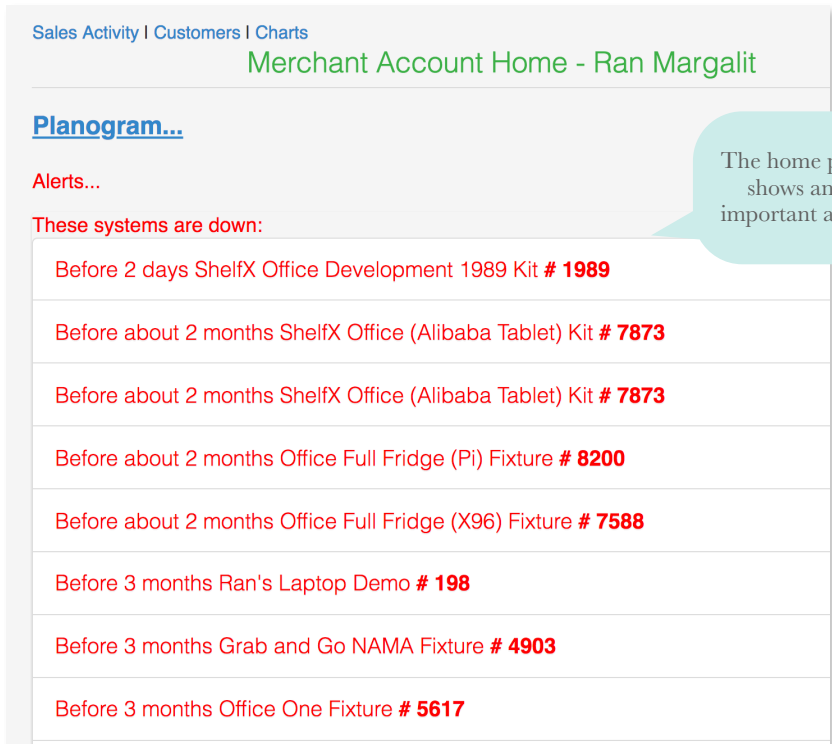
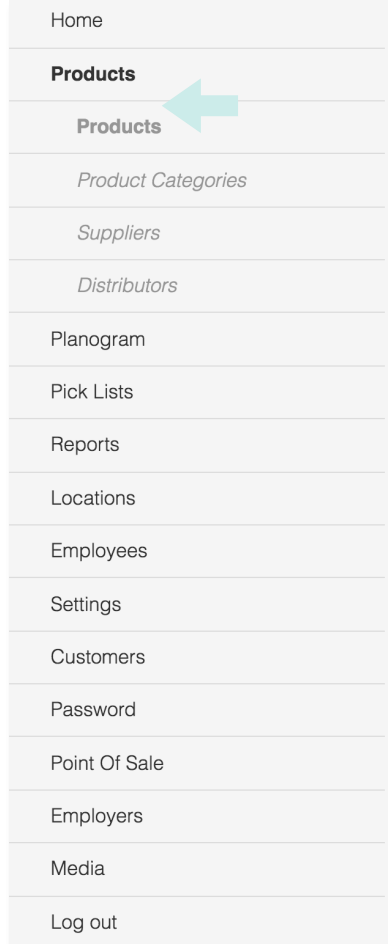
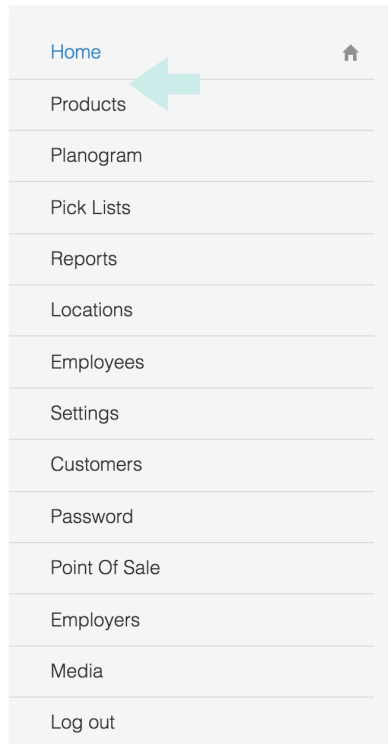


# ShelfX Training Manual

2018-2019



The Products page allows you to specify the products that you will sell in your ShelfX enabled fixture. It is sorted by product categories which allow merchants to distinguish between types of products. Select a certain product to see more information regarding it. To create a new product click on "New Product".

# Products

Home

**Products**

Products

Product Categories

Suppliers

Distributors

After selecting new product, the merchant can enter the name, the sales price, how much it cost you as the merchant, and it's weight.

More information about products include:

Supplier: Specify who the supplier (page ) of the product is.

Category: Specify the category or categories (page 1) the product falls under. An example could be Soda category and Diet category.

Nutrition Facts can be specified in the drop down.

If the product is **taxable**, the tax rate is stated in the box to the right. If it is **perishable** the fixture will alert you if food goes bad.

## Product Details

Photo

Video

Choose File No file chosen

Choose File No file chosen

Upload

Upload

Name: 9.5 oz Frappuccino

Default Sales Price : \$3.25

Product Weight : 0.00

Supplier: Beverage Supply House

Category:  
Generic

SKU Item:

UPC Barcode:

Clover ID:

Back to List Duplicate Edit Delete Product Activity... Where Used

## Product Assignments

Shelf Fixture Location  
D1 Fixture Office One  
D2 Fixture Office One  
D3 Fixture Office One  
E4 Fixture Office One  
D4 Fixture Office One

Back

You can add in lines of text under Display to be seen on the carino when the specific product is raised. If using an Android you can select the video to play when product is raised.

Information about barcodes and SKU can be added here.

## New Product

Name

Default Sales Price \$

Cost \$

Product Weight  Once

## More

Supplier **Beverage Supply House**

Sales Category **Generic**

Category 1 **Generic**

Category 2 **Generic**

Category 3 **Generic**

Category 4 **Generic**

Product Categories...

## Nutrition Facts

☒ Taxable

Tax Rate

☐ Perishable

TTS Name

Display

2

Video file name

SKU Item

UPC Barcode

Sub Barcodes

Clover

**Product Assignments** shows which fixture, shelf and location the product resides in.

## Product Activity

Product	Qty	Need
La Croix - Clear	7	47
9.5 oz Frappuccino	-6	36
Starbucks Doubleshot	6	26
Brookside Acai and Blueberry Chocolate	-5	25
Pretzel Goldfish	-1	21
Raspberry Chocolate Milano Cookies	-8	21
Doubleshot Espresso	-4	20
Banana Chocolate Milano Cookies	-3	17
Sorte	3	17

**Where Used** shows the placement of the selected product. The video file can be easily changed and a photo of the product can be added. **Product Activity** displays all products shelf qty and need.

# Suppliers and Distributors

Home
<b>Products</b>
<b>Products</b>
Product Categories
Suppliers
Distributors

## Distributor:

The distributor category is created in order to keep a record of who your distributors are for your products. An example to understand the difference between distributors and suppliers is: Manufacturer is Yogurt . Supplier is Yogurt USA, Distributor in Boulder is AB Dairy Distribution, In Denver is Denver Dist. Becomes relevant when generating pick lists which are used to know what items, in what quantity, are needed to restock a selected fixture.

Suppliers

New Supplier

Q Filter items...

Self

Beverage Supply House

## New Supplier

Supplier Name

Email

Employees

☐ ADAM ANDERSON

☐ Andy Franklin

## New Distributor

Distributor Name

Monthly Cost

Suppliers

☐ Beverage Supply House

☐ Self

## Suppliers:

You must associate each product with a supplier. By default there is one supplier, called Self (you can change the name) to which products are associated by default. One of the purposes of the supplier relationship to products is to allow “sub-leasing” shelves within the fridge to particular suppliers. You can assign employees to the supplier and those employees only have access to the planogram for the shelves with that supplier’s products. Reporting of sales activity by supplier is also supported.

## Distributors

New Distributor

Q Filter items...

# Planogram

Planogram
Planogram
BOGO
Combo Deals
Special Discounts

## Please Select Location

New Location

Q Search location, group or serial (min 3 letters)

☐ CES Show

☒ CES #6973

**Please Select Location:** The first thing the merchant sees when selecting planogram, is the option to select a location for which to see the planogram. More information on creating and editing locations is on page 10

The **Planogram** is where you assign products to shelves and set other inventory management parameters. The Planogram also shows current shelf inventory on hand and how much room there is on the shelf for product.

Depending on the options you select when editing the planogram, it will change different colors based off the urgency of restocking the items.

**Green** indicates there are enough items.

**Yellow** indicates you are running low.

**Red** indicated you are out of items on that particular shelf.

Open door will open the fixture remotely.

## Planogram - CES [Fixture #6973](#) |

CES |

Change Location

☐ Fixture

Days of the week:

A1 Philo Spool Cable \$10.00 3 on hand room for 6 Possible items

A2 JBUDS Bluetooth Earbuds \$25.00 3 on hand room for 6 Possible items

A3 Fantasy Wireless Charger \$20.00 3 on hand room for 10 Possible items

B1 Blue Graphic T-shirt \$10.00 3 on hand room for 6 Possible items

B2 Blue Graphic T-shirt \$10.00 3 on hand room for 8 Possible items

\* B3 Blue Graphic T-shirt \$10.00 3 on hand room for 6 Possible items

\* C1 EOS Lip Balm \$4.00 0 on hand room for 6 Possible items

C2 EOS Lip Balm \$4.00 9 on hand room for 6 Possible items

Editing Planogram

CES-Fixture-A1

Back

Change product to: Philo Spool Cable on A1

Calibrate

New Product Edit

Room on the shelf for 6

Bring no more than 0

Show on Pick List when reaches 6

Set current qty to 3

Adjust: ☒ Tare ☐ Product eWeight

Price from products list 10.0

Price at this location 0.0

Calibration

A1 Philo Spool Cable - Stored weight : 0.0 OZ

E Weight Realtime

Make sure shelf A1 has no products on it and click the next button

Next Back to List

## Editing Planogram:

**Calibrate:** When first adding products you must calibrate the products to figure out their electronic weight and offset.

**Change product :** Select product in which to calibrate and edit

**Room on the shelf:** The max room on the shelf for the selected product.

**Bring no more than:** Used in generating restocking list, how many the distributor should bring to restock the fixture.

**Show on Pick List:** The quantity of products it must reach to be shown on the pick list as an item that needs to be restocked.

**Set Current Qty to:** Manually edit what the current quantity is.

**Price at this Location:** Say you want the price to be cheaper at a specific location, indicate it here.

## Calibration

The calibration wizard will guide you through the calibration steps:

1. Make sure the shelf is empty.
2. The system finds the proper offset setting for an empty shelf. This ensures that a proper baseline electronic reading for the shelf is possible.
3. The system finds the proper Tare reading for the shelf. (Tare is the reading with nothing on the shelf).
4. You are instructed to put one item of the assigned product on the shelf.
5. The system finds the proper gain setting to ensure proper counting of items as they are added or removed from the shelf.
6. You are then instructed to add the remaining items on the shelf and verify that the count is accurate.

## Shelves (under locations)

Home
Products
Planogram
Pick Lists
Reports
Locations
Locations
Location Groups
Employees
Settings
Customers
Password
Point Of Sale
Employers
Media
Log out

### Listing shelves [Grab and Go NAMA #4903](#)

Grab and Go NAMA #4903 | Office Full Fridge (X96) #7588 | Office Full Fridge (Pi) #8200 |

Refresh

Change Location

New Shelf

Planogram

	Shelf Line	
A1 4904 Port 1 0 La Croix - Clear	R:0 T:121 E:16 O:151 G:48 D:-121 C:0 S:-354	
A2 4904 Port 2 24 La Croix Tangerine	R:959 T:33 E:39 O:142 G:10 D:926 C:1 S:0	
A3 4904 Port 3 12 La Croix - Lime	R:1023 T:110 E:77 O:135 G:0 D:913 C:0 S:-771	
A4 4904 Port 4 20 La Croix - Cran	R:888 T:130 E:38 O:151 G:12 D:758 C:1 S:0	
B1 4904 Port 5 0 Starbucks Doubleshot	R:0 T:170 E:27 O:151 G:20 D:-170 C:0 S:0	
B2 4904 Port 6 0 Starbucks Doubleshot	R:0 T:46 E:37 O:151 G:10 D:-46 C:0 S:0	
B3 4904 Port 7 0 Core Water	R:0 T:60 E:44 O:151 G:20 D:-60 C:0 S:0	
B4 4904 Port 8 0 Smart Water	R:0 T:101 E:30 O:151 G:20 D:-101 C:0 S:0	
C1 4904 Port 13 0 Brookside Chocolate Almonds	R:0 T:183 E:19 O:151 G:10 D:-183 C:0 S:0	
C2 4904 Port 14 0 Brookside Pomegranate Chocolate	R:0 T:93 E:24 O:151 G:10 D:-93 C:0 S:0	
C3 4904 Port 15 0 Brookside Acai and Blueberry Chocolate	R:0 T:221 E:26 O:151 G:10 D:-221 C:0 S:0	
C4 4904 Port 16 0 Starbucks Ground Coffee	R:0 T:387 E:48 O:151 G:0 D:-387 C:0 S:0	
D1 4904 Port 9 0 Pretzel Goldfish	R:0 T:199 E:52 O:151 G:0 D:-199 C:0 S:0	

Once each shelf is assigned a product and calibrated, look at **Shelves** under the locations tab which shows a list of all the shelves in the fixture with their assigned product. Each **shelf line** is interpreted as follows:

Shelf locator (row/column), the serial number of the SCU (shelf connector unit), the port on the SCU that the shelf is connected to (1-16), the quantity of products on the shelf, the name of the product, the current electronic reading, the Tare value (electronic reading with an empty shelf), the electronic weight of one item, the offset setting, and the gain setting for the shelf.

More detailed information about shelf connectivity can be found on page 12 of this manual.

**ALWAYS SYNC AFTER MAKING CHANGES**

Sync Fixture

Total Read: 4149 Total Tare: 2108 Items Count: 44  
 R: Read (Current Weight)  
 T: Tare (Weight when the shelf is empty)  
 E: Electronic Weight (Weight of one item)  
 O: Offset (Position where to start reading weight, usually around 130)  
 G: Gain (0 is most sensitive for light items, 30 for heavy items.)  
 D: Read minus Tare  
 C: Off Session Changes (Noisy plate, should be replaced if high)  
 S: New Scaling System Value

Shelves with zero read might be disconnected or offset is too low.  
 Shelves with 1023 read might be:  
 1. damaged  
 2. offset is too high (above 145...?)  
 3. gain is too low for the number of products on the shelf.

Too noisy! Check connector or replace plate. Resets when you synch.



# BOGO, Combo Deal, Special Discount

**Combo Deal:** allows the merchant to give the customer special combination deals whereby if the customer buys products from any of up to four product categories, they get a special price for buying all the products together. **Coupon Code:** You can give your coupon a certain code **Days of the Week:** Decide the days that this Combo Deal is available **From Time till Time:** Decide the times that the Combo deal is available. **Location:** Where is this combo deal available? **Category:** Choose from 4 categories that will be available in the combo deal as well as the Price.

**BOGO:** allows the merchant to define BOGO deals whereby the customer gets to purchase a second product at a lower price if they buy the first product a full price. **One per Customer:** Select if customer can only use this deal once. **Loyalty:** Not fully implemented but, if you buy product over a longer period of time you get the reward later. **Buy Qty/Get Qty:** Buy a specific product get a different specific product at a certain price you set in "At this price"

## New BOGO

Name

Coupon Code

☐ One Per Customer

☐ Loyalty

Location

Buy Qty

From this product

Get Qty

From this product

At this price

Create BOGO

**Special Discount:** Similarly to BOGO and Combo Deals, Special discount has the same basic settings. Differently you can select a product and give it a certain "percentage off." You can select a minimum # of items they must buy to get the discount or the **minimum purchase** in dollars. Employers can give their employees a **daily allowance** which can be obtained in a transaction report that can be downloaded by the merchant.

## New Combo Deal

Name

Coupon Code

☐ One Per Customer

**Days of the Week**

Start Date

End Date

From Time

Till Time

**Locations**

Category

Category

Price

Create Combo Deal

## New Special Discount

Name

Image

Coupon Code

☐ One Per Customer

**Days of the Week**

Start Date

**Products**

**Payment Type**

Percentage Off

Min Number of Items

Daily Allowance

Minimum Purchase

**Payment type** can be used to reward customers for using a certain type of payment or to give employees using their employee card a discount. These options will differ depending on the payment options you as a merchant decide to offer.

**Locations**

**Products**

**Payment Type**

☒ All

☐ Xcard

☐ Credit Card

☐ Employee Card

☐ 10bis

☐ Sodexo

☐ Bepoz

☐ Nayax

# Pick Lists

Home

Products

Planogram

Pick Lists ←

Pick Lists

Waste Reports

A Pick List is used to know what items, in what quantity, are needed to restock a selected fixture. xManager allows pick lists to be generated by location.

23/09/16 11:53am 13

Download all data as CSV file

Summary:

Cooper Ct - Self

04/08/16 12:08pm 10

28/07/16 10:54am 9

22/07/16 08:01am 8

05/07/16 04:05pm 7

04/07/16 07:11pm 6

The pick list generated on the below for Cooper Ct -Self) Shows what the distributor would receive. You can print this, download it as a CSV file or a FIXED file.

## Create Pick Lists for these distributors:

☒ Noa

## Locations:

### Locations

- ☐ Sun
- ☐ Mon
- ☐ Tue
- ☐ Wed
- ☐ Thu
- ☐ Fri
- ☐ Sat
- ☐ Location Group CES Show

The quantity of items needed to restock the fridge is based on parameters set in the planogram

Sending: Amount distributor needs to bring to have the shelf be fully stocked.

Extra: the driver see the pick list to see what extra product he needs to bring to the fixture

Max Qty: Based on product size, weight and shelf space that you set.

Inventory: Amount currently on shelf.

Back Edit

Product UPC Barcode Shelf Sending Extra Max Qty Inventory

Edit Print

Download all data as CSV file

# Waste Report

## Waste Reports - CES #6973

Grab and Go NAMA | ShelfX Office Development 1989 |

CES |

Change Location

All

New Waste Report

Please select file to upload

Choose File No file chosen

Upload

Waste reports show the location, the employee and then allows you to add in the Qty that had to be put into waste depending on the product. Once you create waste it will keep that information for when you look at other reports for the sales of that fixture.

## New Waste Report

Grab and Go NAMA | ShelfX Office Development 1989 |

Back

Location: CES

Employee: Ran Margalit

Product	Qty
Bed Head Hair Product	<input type="text"/>
Blue Graphic T-shirt	<input type="text"/>
Blue Graphic T-shirt	<input type="text"/>
Blue Graphic T-shirt	<input type="text"/>
EOS Lip Balm	<input type="text"/>

# Reports: Sales Activity

Reports
Reports
Employee Activity
Sales Activity
Inventory
PDF Statements
Charts
Product Analysis
Stats
Sessions
Snapshots
Summary

Sales Activity | Customers | Charts

Custom Search...

## Sales Activity

Total sales this month: Products \$0.00

Total sales today: Products \$0.00

Note: Clicking Reports will show the same page as clicking Sales Activity

By clicking “Custom Search” you can generate reports by date range, locations, products, suppliers, and payment type.

Sales Activity | Customers | Charts

Custom Search

Date Period

Select Date Period

Start Date

End Date

Locations

Products

Suppliers

Payment Type

Export to CSV

Full Details

Search

Export to CSV will save your custom search as a .CSV file

# Reports: Employee Activity

This report shows employee-stocking activity by date and location. It shows each stocking session, with the changes in inventory for each product and the length of time the employee spent at the fixture during stocking session.

## Employee Activity

Product	Before	After	Change
16 May 13:21	Office Full Fridge (Pi)	Tom Bonan	less than a minute
Perrier Water - Lime	1	8	7
Starbucks Doubleshot	3	6	3
Starbucks Ground Coffee	1	3	2
16 May 13:21	Office Full Fridge (Pi)	Tom Bonan	less than a minute
Starbucks Doubleshot	-2	3	5
16 May 13:21	Office Full Fridge (Pi)	Tom Bonan	less than a minute
Perrier Water - Lime	-1	7	8

# Reports: Inventory

## Inventory

Download as a CSV file

Product	Qty	Need	Shelves	Cost
La Croix - Clear	7	47	7	0.33
9.5 oz Frappuccino	-6	36	5	1.8
Starbucks Doubleshot	6	26	5	1.0
Brookside Acai and Blueberry Chocolate	-5	25	3	5.0
Raspberry Chocolate Milano Cookies	-8	21	3	3.0
Pretzel Goldfish	-1	21	2	2.0
Doubleshot Espresso	-4	20	2	1.0

Inventory shows the quantity of a product, how much product is necessary to reach the maximum set quantity, as well as how many shelves the product is on.

# Reports: PDF Statements

PDF Statements are a way for you to access and download the Reconciliation PDF. This shows the amount of money you receive, the amount that goes to ShelfX for the technology as well as the ACH Reference Number. These statements will look different if you have fixtures outside of the USA due to different methods for banking.

## Reconciliation Statements

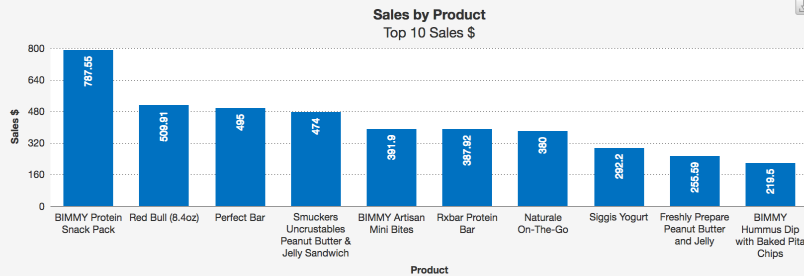
Date	Settlement Amount	ACH Reference	Download	Download As CSV
07/10/2018	\$0.0	0	PDF	CSV
07/10/2018	\$0.0	0	PDF	CSV

# Reports: Charts

## Charts

Custom Search...

### Sales by Product



Charts are an easy way to display the sales based on different parameters you decide on. These range from location, suppliers, product hourly sales, or by location groups. These can all be either changed by clicking on the links below the graph or under the custom search tab. The charts can be downloaded by clicking the button on the right corner.

# Reports: Product Analysis

Change Location

Apple Fifth Avenue 1687 | Apple Fifth Avenue 3058 | Apple Fifth Avenue 307

Product	Current Qty	Empty In	Loading Qty	Min Qty	Loaded	Last Sold	Sells Every	Qty Past 7 days	Qty Past 30 days	Sales Past 30 days \$	Waste 30 days
Test Product	1	8 months	2	1	8 months	about 1 month	8 months	0	0	0	0
Tate's Chocolate Chip	5	11 months	5	1	2 months	2 months	2 months	0	0	0	0
Quaker Cranberry Almond Breakfast Flats	10	over 1 year	12	11	4 months	4 months	2 months	0	0	0	0
bark thins 2oz	1	about 1 month	2	1	about 1 month	1 day	about 1 month	0	0	0.0	0

Product analysis shows the current quantity in the shelf, an approximate time in which the shelf would be empty based on average visits, the amount that was last loaded is the loading qty. Loaded is the time that it was last loaded. Last sold is the time it was last sold. Qty past 7/30 days is the amount in the shelf the past 7 or 30 days. Sales past 30 days shows in dollars the amount last sold. Waste 30 days shows how many of the product had to be put into waste.

# Reports: Stats

## Stats

Custom Search...

Sessions

### Visitors

Number of unique visitors	3
Number of visits	7
Visits per day	1
Visits per customer	2.33
Number of new visitors	1 33%
One time visitors	2 66.67%
2 times visitors	0 0.0%
3 times visitors	0 0.0%
4 times visitors	0 0.0%
5 times visitors	1 33.33%
6 times visitors	0 0.0%
7 times visitors	0 0.0%
8 times visitors	0 0.0%

### Carts

Average Cart	\$4.31
Average Items per Cart	1.14
One Item per Cart	6 85.71%
2 Items per Cart	1 14.29%
3 Items per Cart	0 0.0%
4 Items per Cart	0 0.0%

Stats shows statistics of based on what you custom search.

Number of Unique Visitors: People that bought the certain item unique to the custom search/ filter.

Number of Visits: How many times the fixture has been visited  
Visits per day: How many times its been visited in a day

Visits per customer: Times customer has visited.

Number of New Visitors: # of new visitors that showed up. # Time visitors: # of Visitors who came several times

Average Cart: Avg amt in \$ in cart

Average Items per Cart: Avg amt of items in cart

# Item Per Cart: Percentage that customers take a certain number of items per cart.

# Reports: Sessions

## Sessions

Custom Search...

Session	Date	Location name	Serial	Employee	Consumer	Amount sold	Product
<a href="#">1146</a>	May 16, 2018 13:21	Office Full Fridge (Pi)	8200	Tom Bonan	0	\$0.00	0 Starbucks Doubleshot
							0 Starbucks Ground Coffee
							0 Perrier Water - Lime
<a href="#">1145</a>	May 16, 2018 13:21	Office Full Fridge (Pi)	8200	Tom Bonan	0	\$0.00	0 Starbucks Doubleshot
<a href="#">1144</a>	May 16, 2018 13:21	Office Full Fridge (Pi)	8200	Tom Bonan	0	\$0.00	0 Perrier Water - Lime
							0 Starbucks Ground Coffee
<a href="#">1143</a>	May 16, 2018 12:49	Office Full Fridge (Pi)	8200	Tom Bonan	0	\$0.00	0 Starbucks Doubleshot
<a href="#">1142</a>	May 16, 2018 19:47	Office Full Fridge (Pi)	8200		285998	\$5.00	2 Starbucks Doubleshot
<a href="#">1141</a>	May 16, 2018 12:50	Office Full Fridge (Pi)	8200		285998	\$0.00	0 Starbucks Doubleshot
<a href="#">1140</a>	May 16, 2018 09:47	Office Full Fridge (X96)	7588		39	\$0.00	0 La Croix Tangerine

Sessions displays the times when someone has used the fridge. Custom search can show a more specified report.

It will display the date alongside the time that that session occurred.

The location of where the session occurred.

The serial of the fixture.

Whether it was an employee or the consumer number who used the fixture.

The amount sold in \$ as well as the number of products that were sold.

# Reports: Snapshots

## Snapshots

Download

Custom Search...

[Locations](#) | [Products](#) | [Out of Stock](#) | [Profitability](#)

Location	Total Sales	28	27	26	25	24	23	22
MTA Grand Central 11th floor	\$76.00	17.00 41.67% ↑	8.00 0.0% ↑	4.00	0.00	0.00	16.00 0.0% ↑	8.00 13.04% ↓
Citi bank 32nd floor	\$22.65	0.00	0.00	7.15	0.00	0.00	0.00	5.50 10.0% ↑
Citi 15th Floor #3283	\$8.25	0.00	0.00	0.00	0.00	2.75	2.75	0.00
Citi 35th Floor	\$6.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Citi 10th Floor	\$4.75	0.00	0.00	0.00	0.00	0.00	2.75	0.00
40th Flr First Data NJ	\$4.00	0.00	0.00	0.00	4.00	0.00	0.00	0.00
Citi 34th Floor	\$3.50	3.50	0.00	0.00	0.00	0.00	0.00	0.00

Snapshots shows a short snippet of the total sales based on a weekly basis. (the numbers on the top i.e 29, 28, 27, etc. represent weeks).

Custom search can specify the snapshot you would like to see for those weeks.

You can also choose to see snapshots based on products, out of stock, or profitability. In this example to the left the snapshot is based on location.

# Locations: Location Group

Location Groups are useful to group together certain locations that fall under the same set of qualities. For example, you could create a location group called Amusement Parks and then place any locations that are in amusement parks in this location group for easy sorting. Certain locations can be placed in a group when creating them as seen on the next page.

## New Group

Name

|

Description

Create Group

➔ Back

# Locations: New Location

Put location in TEST MODE if you do not want it to charge anyone

Location Name/Number/Description: Give your location a unique name, number, and description.

Address/City/Country/State/Zip code: This is the address of your new location.

Default Language: The language you want to be used for your fixture in that location.

! Time Zone: In order for reports to be correct, your time zone and the machine timezone must be correct.

Location Group: Done under location groups in the sidebar before you create a new location.

Latitude/Longitude: Exact coordinates can be set by clicking set from GPS under "Ask Every Time".

Contact Information: Person who will be called if there is a problem at the fixture itself.

It is suggested to send technical alerts to [support@shelfx.com](mailto:support@shelfx.com) since this will allow the technical problems to be fixed.

## New Location

☐ **Test Mode**

Location Name

+

 Address

Location Group

Select Group

▼

New Group

Location Description

Address

Address

City

Country

United States

▼

State

N/A

▼

Zip Code

Default Language

English

▼

Time Zone

(GMT-07:00) Mountain Time (US & Canada)

▼

Machine Timezone

US/Mountain

▼

Latitude

Longitude

Set from GPS

→

Show Map

→

+

 Contact Info

Contact Name

Contact Phone

Contact Mobile

Contact Email

Send technical alerts to email



## Payment Methods

**Sales Tax:** What is the sales tax at this location

**Receipt Sales Tax:** This shows the tax portion on the receipt that is sent to the customer. Useful in countries where tax is included in price of item

**Monthly Rent:** What is the monthly rent of this location (used in reports)

**Card Reader Type:** Select either USB, Magtek or Both based on the card reader you have attached to the fixture.

**Has Swiper:** Select the direction for arrow on the display depending on where you install the swiper for the card

**Xcard- Accept Organization Only:** This means that you only accept Xcards that were given by your organization.

**Do not allow to open more than one fixture at a time:** If location has several fixtures and you prefer they use their card every time to open each individual fixture.

**Do not authorize existing customers:** If customer has shopped at this location it will not authorize their credit card for each purchase.

**Must have credit card:** Door opens only if credit card is on file, otherwise it will ask user to swipe card.

**If balance is below a certain amount,** show on screen.

**Show Hold Card:** tells customer where to place card

**Take First Pay After:** if you still have cashiers, allow them to take without paying and pay at cash register

**Hide Pricing info:** doesn't show prices of items on display

Payment Methods

Sales Tax0.0

Receipt Sales Tax0.0

Monthly Rent0.0

Card Reader TypeMagtek

Has SwiperLeft to the Screen

☒ Allow use of Credit Cards

☐ Xcard - Accept Organization Only

☐ Do not cache Xcards

☐ Do allow to open more than one fixture at a time

☐ Do not authorize existing customers

☐ Must have credit card on file

If balance below1000

☒ Show account balance

Low Funds Threshold0.0

A Low Funds warning will be given on the shelf display if the consumer's account balance is below this threshold. If this profile is used with a locking fixture, the fixture will not be unlocked.

☒ Show Hold Card

☐ Take First Pay After

☐ Hide Pricing Info

☐ Use fingerprint reader

☐ Use NAYAX reader

☐ NAYAX Multi-Session

NAYAX Version (1,2)1

NAYAX FTDI Serial

☐ Use OTI reader

☐ Use Castles reader

☐ Use Venmo

☐ Use Keypad for Access Code

☐ Use Ingenico reader

☐ Use IDTech reader

☒ IDTech Encrypted

IDTech Firmware1.4

Ticket Restaurant FTDI Serial

☐ Use NCR with Sinel reader

☐ Use First Data Clover reader

Xcards can work when the internet is down. This feature makes sure it does not open when internet is down. When people get allowances and have multiple machines, it is important to block this feature.

The options for different readers depend on the method of payment your location accepts. Please contact us at [noa@shelfx.com](mailto:noa@shelfx.com) if you have any questions regarding what method you use.

## Distribution

If your location has a certain number, center code, or operates on certain days of the week specify them as necessary.

## Temperature Settings

The fixture is equipped with temperature sensors. Receive an email if the internal hardware goes over a certain temperature. Also, if the fixture itself goes over a certain temperature, you can take it out of service.

## Out of Service

Take your fixture out of service during a certain time.

## Extra Features:

If you use an android tablet as the display select *Use Android Tablet*. Select video and TTS volume as well as the type of screen.

Door Lock Type: Under Drop down select either-

No Lock: Open Shelf

Latch: Normally used with Lock

Magnet: If no electricity, it will open

Royal Lock: Specific for royal fridge

Power Board: Like latch but uses own power board code

Door Lock Delay: If you want some kind of second delay before door locks specify here.

If fixture is outdoors select Outdoor.

If fixture uses a cellular connection specify Cellular.

Tare on Sync when Product Changed:

Display Product Lines: Display information of product description (page 2) on screen.

### - Distribution

Location Number

Distribution Center Code

Days of the Week

☐ Mon

☐ Tue

☐ Wed

☐ Thu

### - Temperature Settings

Email temperature alert if

Carino

Goes above Degrees Celsius

30

☐ Take fixture out of service if temperature goes above

20

(°C)

☐ Put fixture back in service when temperature is under threshold

### - Set Out of Service Time

☐ Out Of Service

Start Time

12:00AM

End Time

12:00AM

### - Extra Features

☐ Use Android Tablet

Android Screen

Regular

Android Video Volume (0-100)

100

Android TTS Volume (0-100)

100

Door lock type

Has Lock - Normally Close (Latch)

Door sensor state

Default

Door lock delay after door close

0

☐ Outdoor

☐ Cellular

☐ Tare on Sync when product changed

☐ Display Product Lines when a product is lifted

# Locations: Edit Shelves

## COMMON SHELF ERRORS:

**Orange** — Shelf is disconnected or the offset for that shelf is set too low (set offset to 132-138 and hit update). The shelves will also show up as orange if they are not connected properly to the system, so make sure that flat cable is inserted properly and the shelves are connected to the right ports.

**Red** — Shelf sensors are damaged, the offset is set to high, or the gain is too low for these shelves. To remedy, move offset lower to 130-136, move gain down to 10, and hit update. The shelf sensors can be damaged for a number of reasons, but most likely it is due to too much weight being placed on them. Sensors can be replaced fairly easily, so if the issue persists, contact our technical support for help.

**Purple** — Shelf sensors are damaged or the connectors are not properly inserted. Generally, this issue is solved by replacing the flat ribbon cable connecting the shelves to our hardware or by replacing the black connector on the ribbon. In the case of this error, call us for assistance.

When clicking on Edit or New Shelf on a specific shelf (like A4) you will see the page to the right.

When setting up the shelf and using the planogram on Xmanager, these categories will automatically change when calibrated.

Fixture indicates which fixture this shelf is associated with.

Shelf Type will be based on the shelf you purchase, most often times they are 4 KG.

Shelf Location is important as it will indicate which row and column it is associated with.

Connected To shows the device and port it is connected.

ID reader/Display show the serial.

Offset and gain is automatically changed when calibrated with planogram

## Location Details

### Grab and Go NAMA in -

[Edit...](#) [Shelves...](#) [Activate fixture](#)

[Back to List](#) [Sync Fixture](#) [Duplicate Fixture](#) [Open Door](#) [Activity Logs](#)

[More](#)

[Delete](#) [Devices...](#) [Restart Fixture](#) [Find Offsets](#) [Tare All](#) [Port Mapping](#)

[Deactivate Fixture](#) [Test Fixture](#)

Click on the QR code to print it  
Place it near the fixture to allow use w



Page 4 for info on Shelves

### Listing shelves **Grab and Go NAMA #4903**

Grab and Go NAMA #4903 | Office Full Fridge (X96) #7588 | Office Full Fridge (Pi) #8200 |

[Refresh](#) [Change Location](#) [New Shelf](#) [Planogram](#)

A1 4904 Port 1 0 La Croix - Clear R:0 T:121 E:16 O:151 G:48 D:-121 C:0 S:-354  
A2 4904 Port 2 24 La Croix Tangerine R:959 T:33 E:39 O:142 G:10 D:926 C:1 S:0  
A3 4904 Port 3 12 La Croix - Lime R:1023 T:110 E:77 O:135 G:0 D:913 C:0 S:-771  
A4 4904 Port 4 20 La Croix - Cran R:888 T:130 E:38 O:151 G:12 D:758 C:1 S:0  
B1 4904 Port 5 0 Starbucks Doubleshot B:0 T:170 E:27 O:151 G:20 D:-170 C:0 S:0

## Editing Shelf

Read: 0 Tare: 121 E Weight: 16

[Tare](#)

Fixture

Fixture

Shelf Type

4KG

Shelf Location

Row

A

Column

1

Connected To

Device

4904

Port

1

ID Reader

4903

Display

4903

Offset

151

Gain

48

E Weight

16

Weight in Grams of calibration object

0

Object E Weight

-354

Update Shelf

[Back](#) [Delete](#)

# Locations: Devices

Creating a New Device is done when you decide to manually add another polpo for example so there can be more flacos (weight sensor with plate)

## Creating a New Device:

Fixture: Select the fixture that you set up earlier.

Device Type: Select whether the device you are creating is a display unit or connector unit.

Registration Number: Select from the drop down the correct number.

Alert with Buzzer: This will create an alarm noise if something happens to the fridge (tampering, stealing etc.) This should not be used if you need the fridge to be in a quiet area.

Power reset if dead: If the raspi or polpo does not communicate with carino it will power reset.

Requires NFC: Cards with NFC have a safer transaction method compared to RFID. If you are not concerned with RFID safety then you do not need to require NFC

By selecting Shelf Connector Unit you can view the display's details.

Clicking Edit: You can select which fixture this connector is associated with, the device it is (in this case a connector) and the registration number. !Auto Offset is not currently implemented so do not select it.

## Device Details Grab and Go NAMA

**Registration Number** 4904

**Device type:** Shelf Connector Unit

**Auto Offset:** On

[Back](#) [Edit](#) [Delete](#)

## Location Details

### Grab and Go NAMA in -

[Edit...](#) [Shelves...](#) [Activate fixture](#)

[Back to List](#) [Sync Fixture](#) [Duplicate Fixture](#) [Open Door](#) [Activity Logs](#)



[More](#)

[Delete](#) [Devices...](#) [Restart Fixture](#) [Find Offsets](#) [Tare All](#) [Port Mapping](#)

[Deactivate Fixture](#) [Test Fixture](#)

## Listing devices for [Grab and Go NAMA](#)

[Back](#) [New Device](#)

	Reader/Display Unit Serial 4903	<a href="#">&gt;</a>
	Shelf Connector Unit Serial 4904 ,	<a href="#">&gt;</a>

## Editing Device (Reader/Display)

By selecting Shelf Connector Unit you can view the display's details. Clicking Edit: You can select which fixture this connector is associated with, the device it is (in this case a connector) and the registration number. !Auto Offset is not currently implemented so do not select it.

## Device Details Grab and Go NAMA

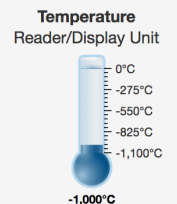
**Registration Number** 4903

**Device type:** Reader/Display Unit

**Use Audible Alert:** No

**Require NFC for Customer Identification:** No

[Back](#) [Activity Logs](#) [Edit](#) [Delete](#)



Once your new fixture is installed and the fixture is connected to the internet, you will see an activation code displayed on the screen on the front of the carino. If you already have fixtures created, there will be a dropdown that will allow you to activate this fixture and copy the shelf and product layout of an existing fixture. To create a new fixture select New Fixture.

## Replace SD of fixture Grab and Go NAMA - Fixture #4903

Activation code

[Activate](#)

[Back](#)

# Employees

Listing Employees

Add New Employee Employee Types...

Filter items...

ADAM ANDERSON/Administrator	>
Andy Franklin/Administrator	>
Iris Margalit/Administrator	>
James Hafer/Administrator	>

Employee details show the information set when you created this new employee. By editing this employee you can change the same information that is explained in regards to creating a new employee.

New Employee

Employee Type Administrator

First Name

Last Name

Xcard Number

Badge

Email

Set Password:

Suppliers

☒ Beverage Supply House

☒ Self

“New Employee”

Employee Type: There are two default employee types, an administrator and a stocker. These can be edited and more can be added under employee types under Employees on the side bar. (Page 11)

First/Last Name: Name of employee

Xcard Number: Each employee should be assigned with an Xcard that can be registered so that they can stock shelves or attend to them if there is an issue.

Email/Password: Add in Employee’s email and password for access.

# Employee Types

Employees will be given a login to the merchant and configuration application with the permissions associated with his or her employee type. As the administrator, you can set an initial password for their account and they can be given (or not) permission to change that password. Each employee can have an Xcard associated with his or her employee account. This Xcard would be used for accessing the fridge for stocking purposes.

There must be at least one employee with stocking privileges and full access to the Merchant and Configuration applications and an associated Xcard assigned in order to perform initial setup of the vending fridge

New Employee Type

Name

Description

Location Based Permissions

Locations: ☐ Set for All Locations

Permissions:

☐ Can load shelves

☐ Can override products

☐ Can access configuration

☐ Can see cost information

Access Rights

Functions	View All	Edit All
<b>Products</b>	<input type="checkbox"/>	<input type="checkbox"/>
Product Categories	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input type="checkbox"/>	<input type="checkbox"/>
Distributors	<input type="checkbox"/>	<input type="checkbox"/>
Product List	<input type="checkbox"/>	<input type="checkbox"/>
<b>Planogram</b>	<input type="checkbox"/>	<input type="checkbox"/>
BOGO	<input type="checkbox"/>	<input type="checkbox"/>
Combo Deals	<input type="checkbox"/>	<input type="checkbox"/>
Special Discounts	<input type="checkbox"/>	<input type="checkbox"/>
<b>Pick Lists</b>	<input type="checkbox"/>	<input type="checkbox"/>
Waste Reports	<input type="checkbox"/>	<input type="checkbox"/>

# Settings

Upload Logo is for the ability to personalize your ShelfX sites, by adding your Logo!

Email Communication is a useful way to communicate with customers. The **welcome message** is when a customer first uses your fixture. The **receipt message** will email a receipt of their recent purchase. The **charge message** will email them when they are charged.

## Settings

Upload Logo

Email Communications

### Product Label

Label width

Label height

Label margin left

Label margin bottom

Product Label can be used to print out labels for your products. By adjusting the label sizes you can make it fit your display preferences

### Enter Link

Save Link for News Feeds

## Upload Logo



Choose File No file chosen

## Email Communications

# Customers: Refunds

You can interact with your customers (the consumers):

- Get contact information for the customer, see what Xcards are registered to their account

You can also download a list of your customers according to a variety of criteria as follows:

- Customers who have your Xcard
- Customers who have shopped at your locations. You can select specific locations or all locations.
- Customer who have NOT shopped at your locations. You can select specific locations or all locations.

You can download the list as a CSV by clicking Export Customer List

## My Customers

Find by:

☒ Name

☐ Xcard Number

☐ Email Address

☐ Phone Number

To Refund or Give Credit to a Customer:

After searching for the customer, clicking their name will take you to a page similar to the one on the right. You can give customer credit to their card and press Keep Balance if we are manually refunding their credit card and only notifying the system of this return. You can also charge the customer if they were not charged correctly. By clicking show customer transactions you can refund specific items rather than giving the customer a different amount in Give Customer Credit.

## RAN MARGALIT

Balance : 830.72

Email Address : margalit@me.com

Mailing Address :

Phone Number :

Xcard Number(s) : 1000A

### Give Credit to RAN MARGALIT

\* Amount \$:

Note:

☐ Keep Balance (For employee getting allowance)



To refund a customer, press on the item link that they bought, and the screen below will appear. Under return list the quantity that should be returned. This refunds their shelfX account, but you MUST email [noa@shelfx.com](mailto:noa@shelfx.com) with the refund amount and name of customer to refund their actual credit card.

Product: La Croix - Clear  
Qty: 1  
Price: 1.0  
Return:

☐ Keep Balance (Funds returned already)

### Customer Transaction Details for RAN MARGALIT

[Download as a CSV file](#)

Date	Transaction Type	Person	Item	Full Price	Sold Price	Qty	Tax	Debit	Credit	Balance	Action
<b>ShelfX Office Development 1989</b>											
2018-05-26 23:58:01 -0600	Purchases							\$0.00	\$0.00	\$830.72	<a href="#">Request Log</a>
2018-05-26 23:54:36 -0600	Purchases							\$0.00	\$0.00	\$830.72	<a href="#">Request Log</a>
2018-05-26 23:54:00 -0600	Purchases							\$0.00	\$0.00	\$830.72	<a href="#">Request Log</a>
2018-05-26 23:52:08 -0600	Purchases							\$0.00	\$0.00	\$830.72	<a href="#">Request Log</a>
2018-05-26 22:02:50 -0600	Purchases							\$0.00	\$0.00	\$830.72	<a href="#">Request Log</a>
2018-03-28 23:45:46 -0600	Purchases							\$0.00	\$0.00	\$830.72	<a href="#">Request Log</a>
<b>Grab Go</b>											
2018-03-27 00:44:54 -0600	Purchases							\$0.00	\$0.00	\$830.72	<a href="#">Request Log</a>
2018-03-25 20:31:05 -0600	Purchases	RAN	<a href="#">La Croix - Clear</a>	\$1.00	\$1.00	1	\$0.00	\$1.00		\$830.72	<a href="#">Request Log</a>
2018-03-25 20:30:14 -0600	Purchases	RAN	<a href="#">La Croix - Clear</a>	\$1.00	\$1.00	1	\$0.00	\$1.00		\$831.72	<a href="#">Request Log</a>

## Password

Update Password

Old Password:

New Password:

Confirm New Password:

Update Password allows you to change the password of your account.


## Point of Sale

This feature is currently not in use

Point Of Sale CES

[Change Location](#)

Click on the QR code to print it



No products selected

Click on a product to add to cart

Filter items...

9.5 oz Frappuccino - \$3.25

Banana Chocolate Milano Cookies - \$4.00

## Media

Media

[New Medium...](#) [Sync Affected Fixtures](#) [Location](#)

Filter items...

Red\_Bull\_Gives\_You\_Wings\_\_World\_of\_Red\_Bull\_Commercial\_\_YouTube.mp4

Media is used if you have an android tablet attached to your fixtures. This does not come with the standard kit. If you have an android, you can add media for when a customer takes a product or puts it back. By selecting New Medium you can choose a file to play and decide the location in which this video will play as well as whether it will loop or only play for new customers.

New Medium

[Choose File](#) No file chosen

Location	Download	Loop	New Customers Only	Play Count
* CES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
* Grab and Go NAMA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
* Nayax 8617	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
* Office Full Fridge (Pi)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
* Office Full Fridge (X96)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
* Office One	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
* Ran's Laptop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
* ShelfX Office (Alibaba Tablet)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
* ShelfX Office Development 1989	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
* Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

[Save](#)

[Back](#)

# Employers

## New Employer

Name	<input type="text"/>
Location Group	<div>Colorado Locations</div>
Employee	<div><div><input type="radio"/> ADAM ANDERSON</div><div><input type="radio"/> Andy Franklin</div><div><input type="radio"/> Iris Margalit</div></div>

## Employees Citibank

New Employee	Upload...
<div><div>Download</div><div><div><input checked="" type="checkbox"/> Last Month</div><div>employee_number,ssn,total</div><div>Download latest batch as CSV file for Citibank</div></div></div>	
<div><div>Employees Communication</div><div><div>Transactions</div><div><div>Top balance to</div><div></div><div>Add amount to existing balance</div><div></div><div>Create Transactions</div></div></div></div>	

Employers can access their own personal Xmanager where they can manage their employees and give them discounts or access as necessary. An example of the hierarchy is as follows:

SUPPLIER/MANUFACTURER  
OF GOODS  
Coca Cola USA

DISTRIBUTOR  
Coca Cola Boulder Colorado

MERCHANT  
A vending company in Boulder

EMPLOYER  
Example: Hospital or bank where merchant places machines

There is also an option to download the Employee database with their information, send email communications and deal with giving your employees credit. You can top balance to a certain amount, which means the employee can have a starting balance each month to use on the fixtures. For example you can give employees \$50 monthly and add more to the existing balance as necessary (like a bonus of some sort).

## New Employee

Name: Name of of employee Email: Employee's email

Employee ID/Badge: This is an optional field to put the employee's information.

XCard: What is the employee's xcard number? Employees must be given an xcard in order to access the fixture.

SSN: Optional field for entering the employee's social security number.

Discount: Does this employee get a discount on items bought?

Daily Allowance: You can give each employee a more specific allowance than the one in "special discounts." For each employee you can decide if they get more or less money than the default.

## New Employee Citibank

First Name	<input type="text"/>
Last Name	<input type="text"/>
Email	<input type="text"/>
Employee ID	<input type="text"/>
Employee Badge	<input type="text"/>
Xcard	<input type="text"/>
SSN	<input type="text"/>
Discount	<div>0.0</div>
Daily Allowance	<div>0.0</div>
Allowance only on date	<input type="text"/>