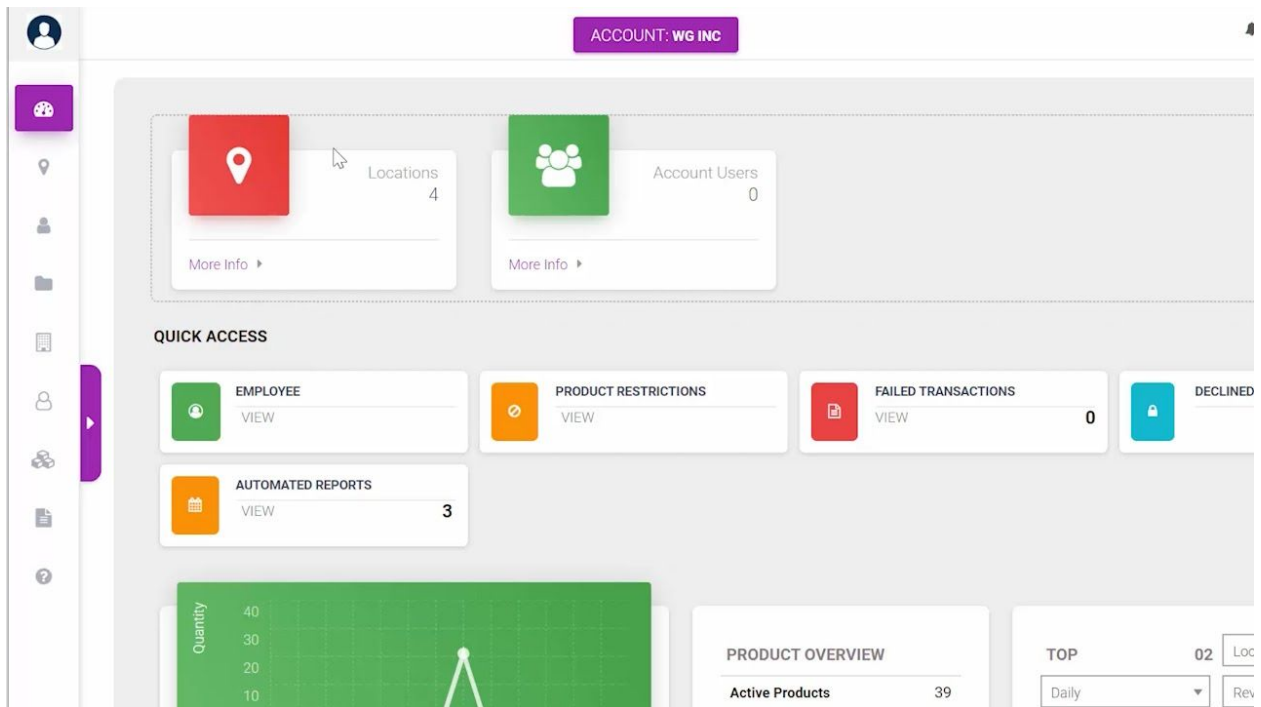
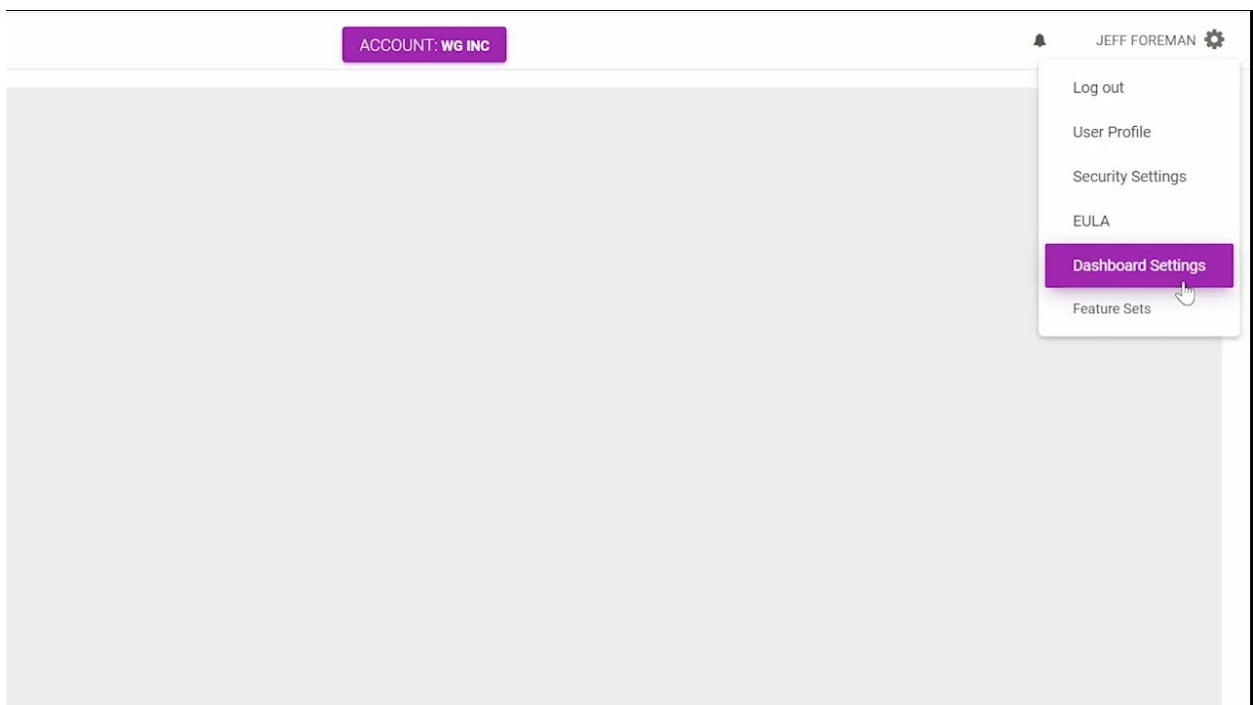


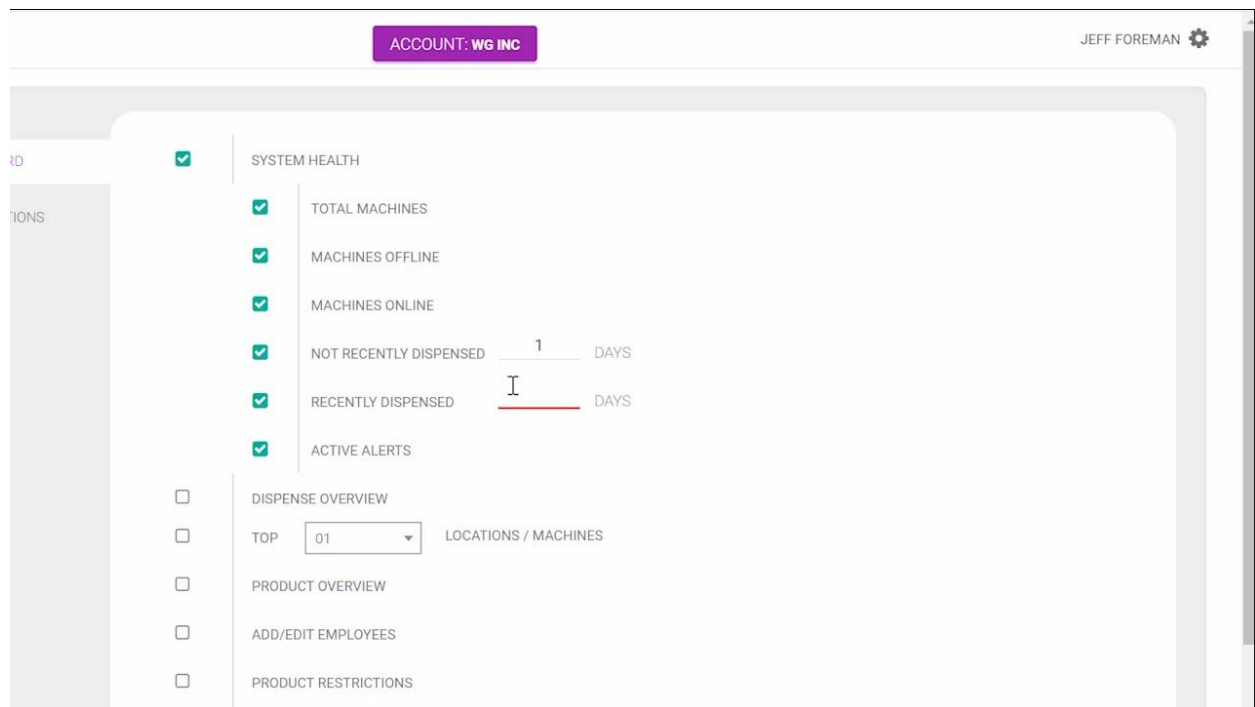
Dashboard



Your dashboard will show the machines you currently have set up.



You can adjust your dashboard by selecting the settings button here and scrolling down to the dashboard setting.

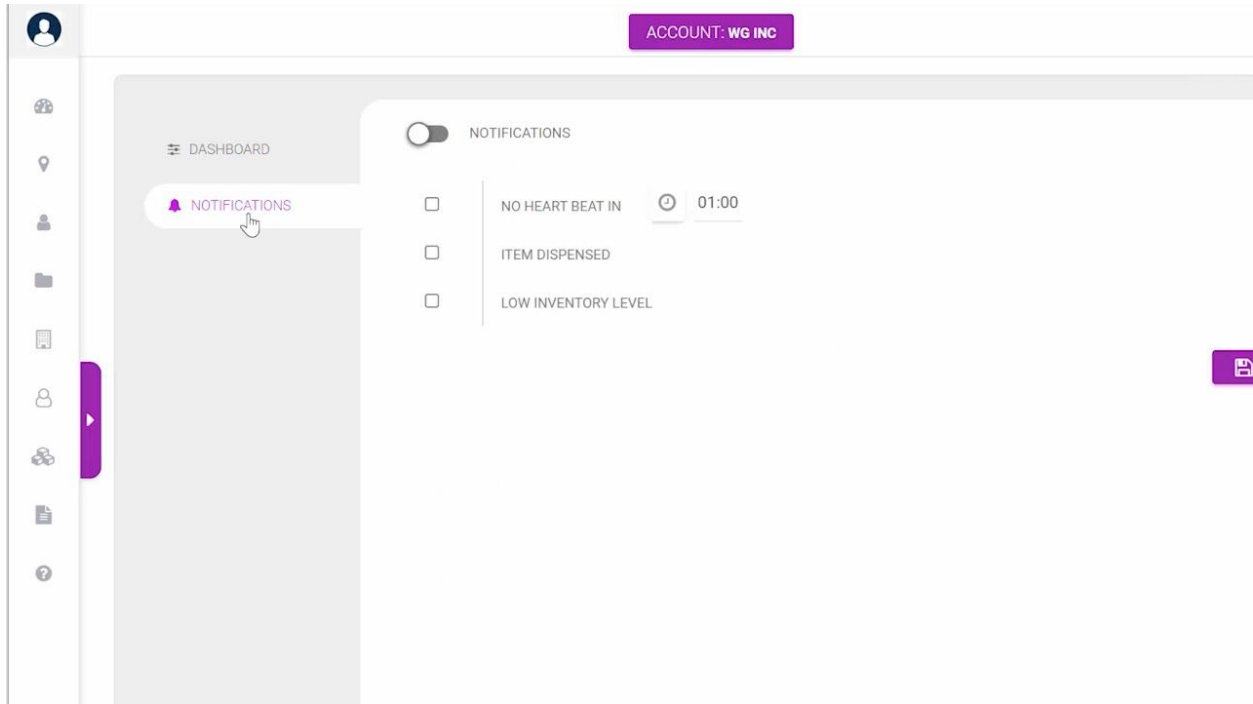


Here you can adjust your dashboard. Be sure to include days for NOT RECENTLY DISPENSED AND RECENTLY DISPENSED.

Further down on the page you can select other options to appear on your dashboard to:

- Dispense Overview
- Top Locations
- Product Overview
- Add or Edit Employees
- Product Restrictions
- Failed Transactions
- Declined Authorizations
- Last Dispenses
- Automated Reports
- Hierarchy Count
- Users Count

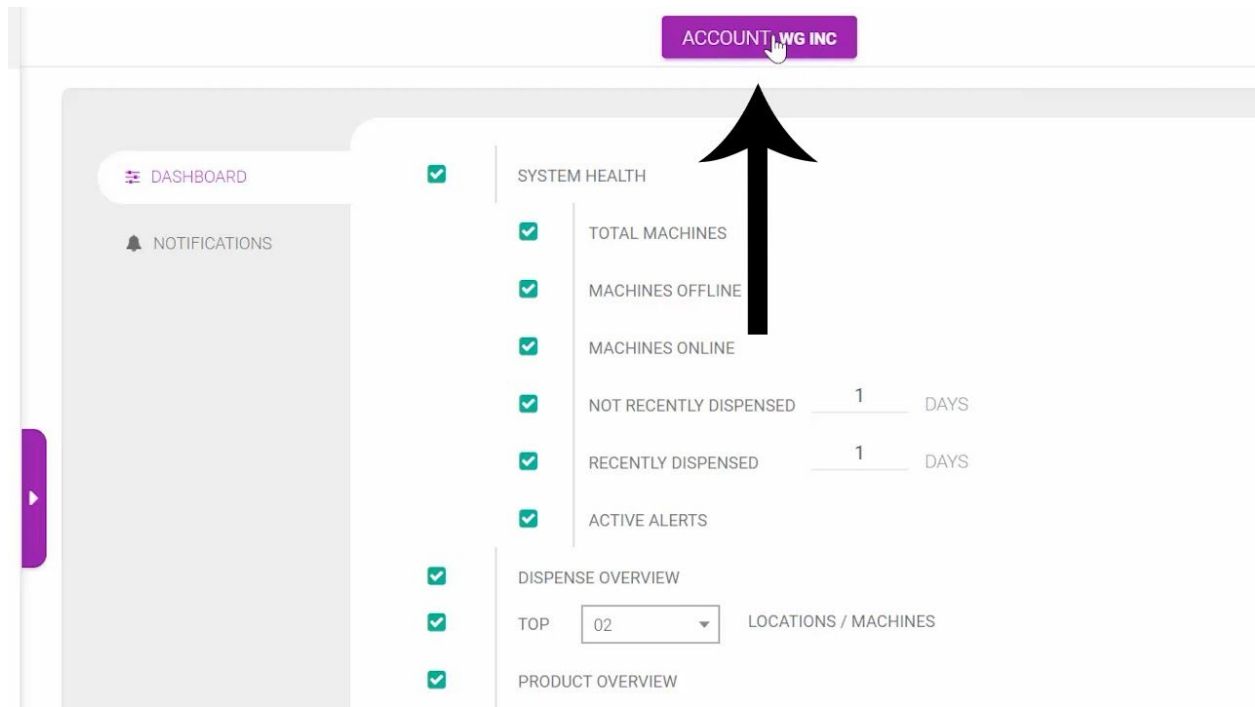
**Always save when complete.*



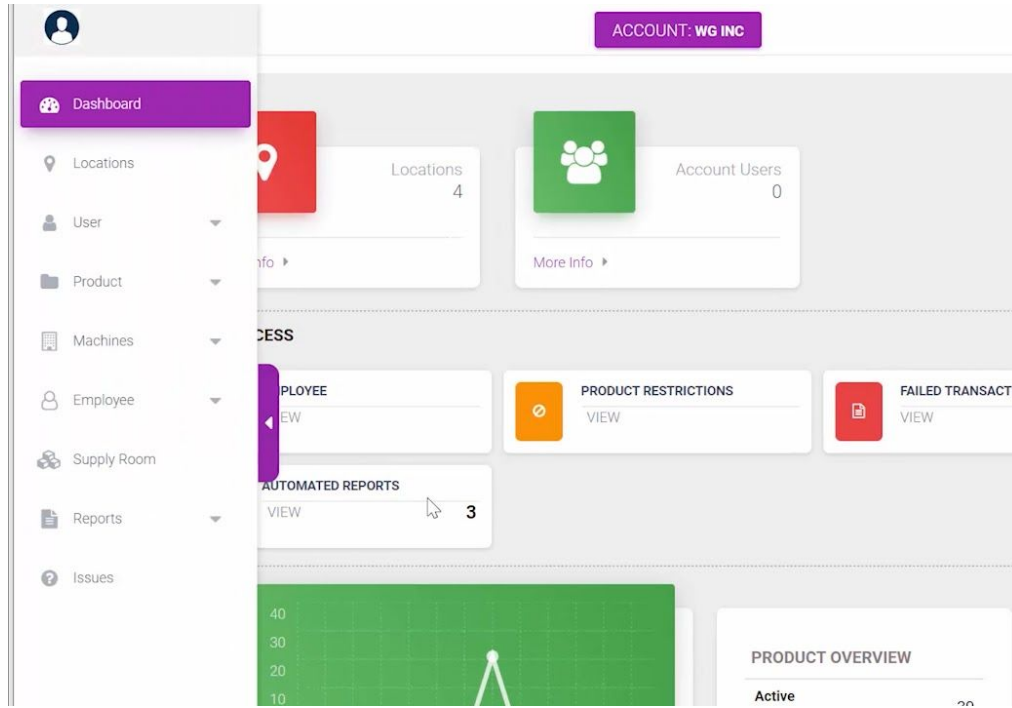
The Notifications page can be accessed here. In order to receive notifications at log in, click the Notifications, as shown above. From here, you can select:

- No Heart Beat in a Selected Period of Time
- See Item Dispensed
- Low Inventory Levels

**Always save when complete*

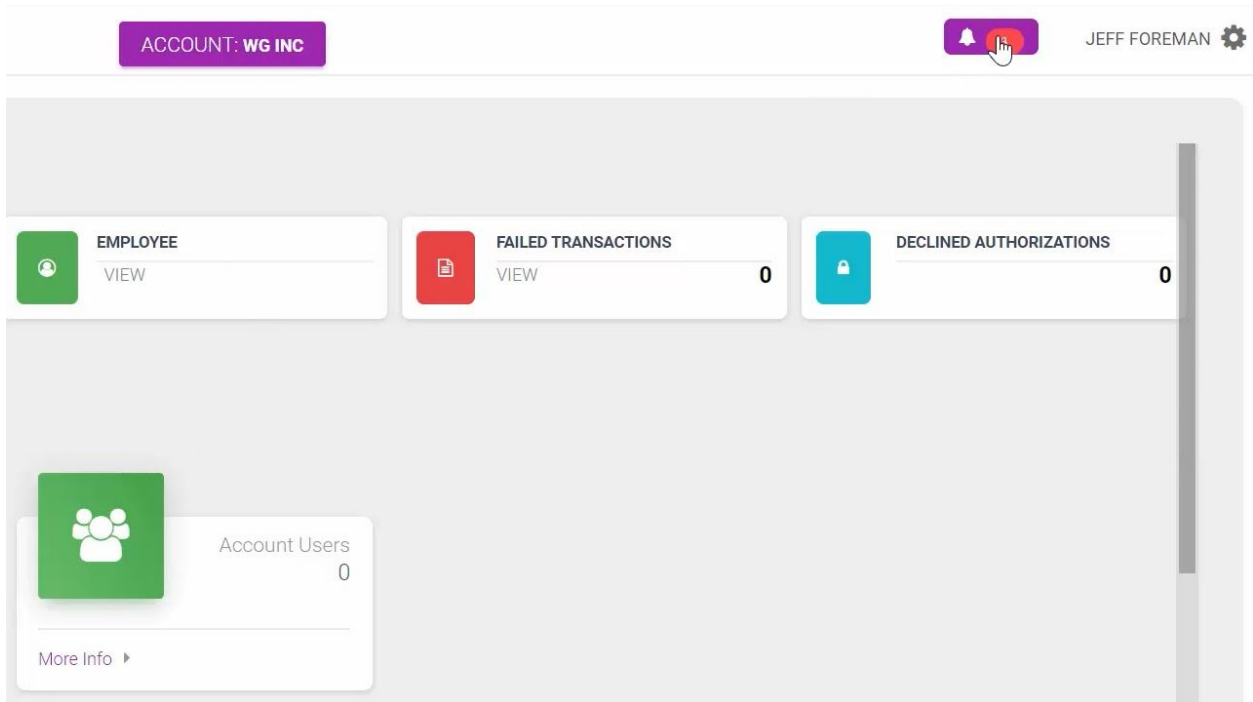


When you click your account name, as shown above, you will be brought to your dashboard where your updated setting will be in effect.

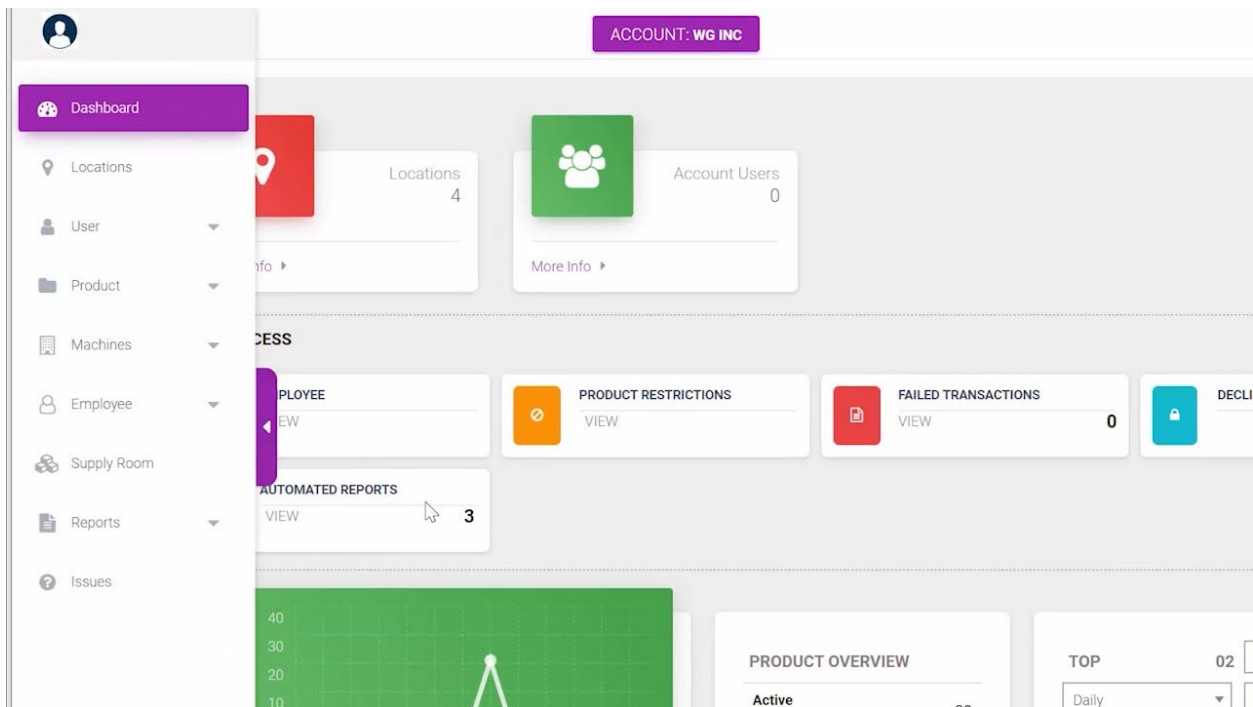


Each user has the ability to customize their own dashboard settings by:

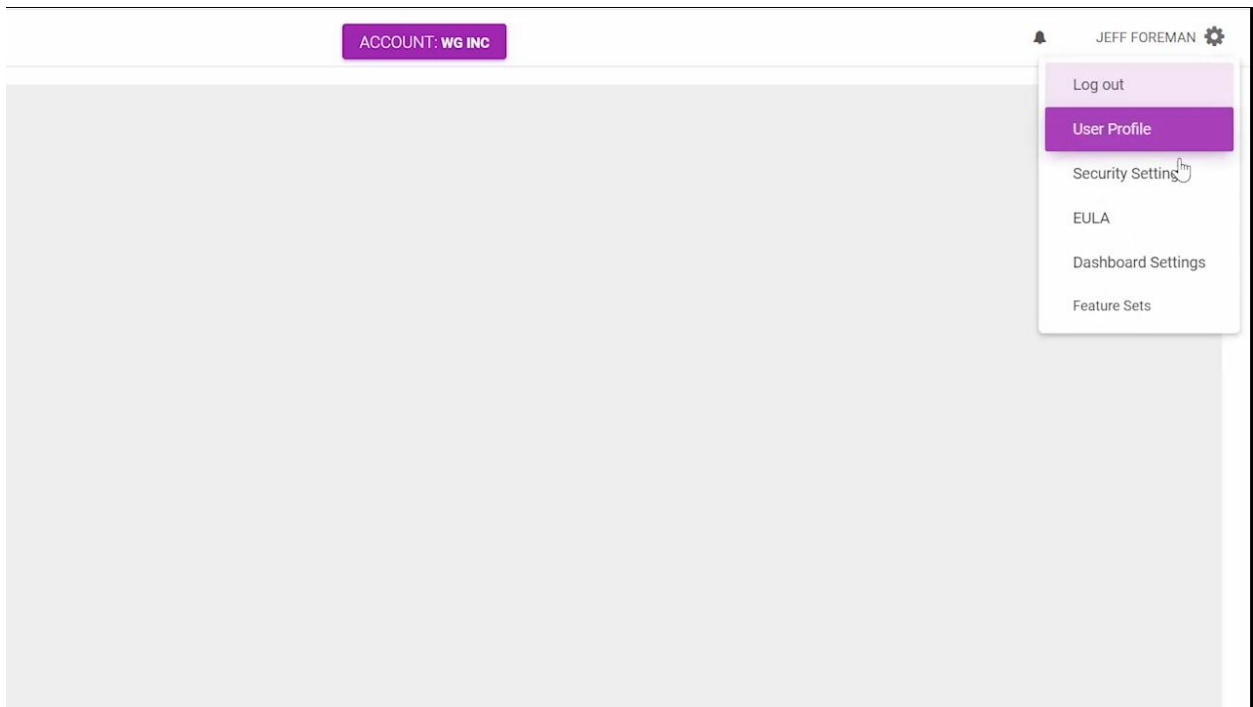
- Dragging different sections to rearrange their location
- Rearrange information buttons with a certain section



Dashboard Notifications can be found in the upper right hand corner.

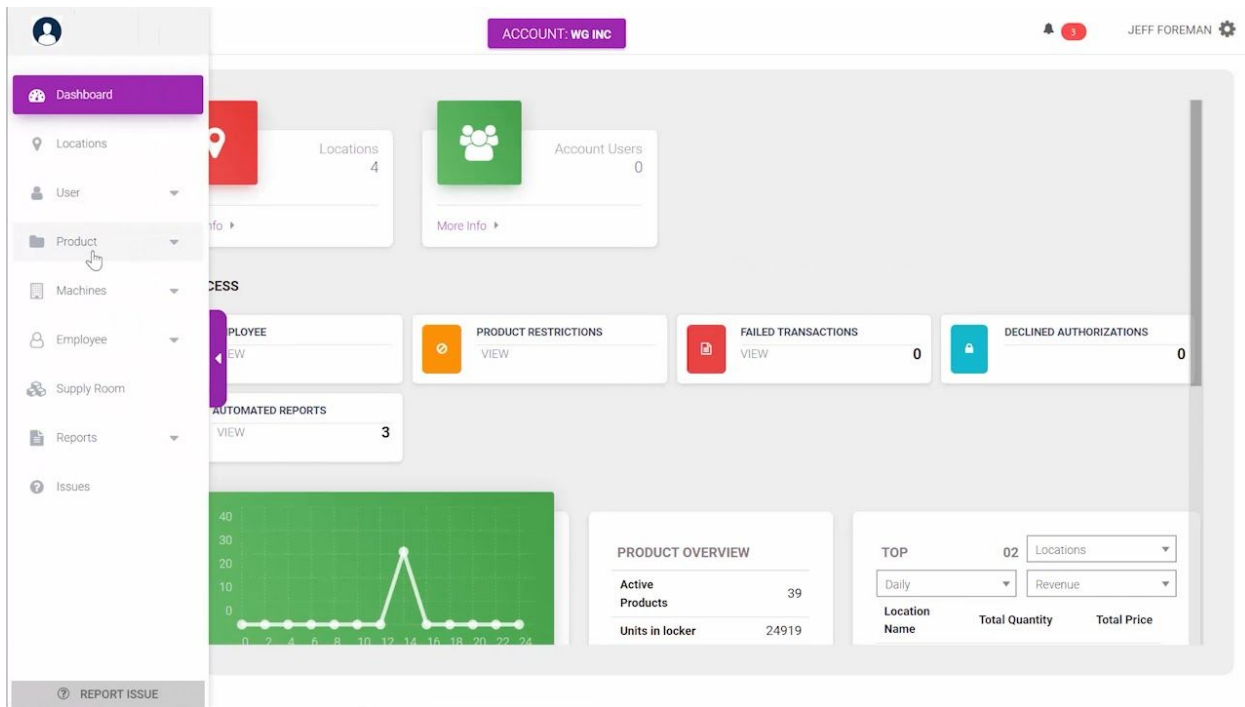


Access the other tabs by clicking the arrow on the left.



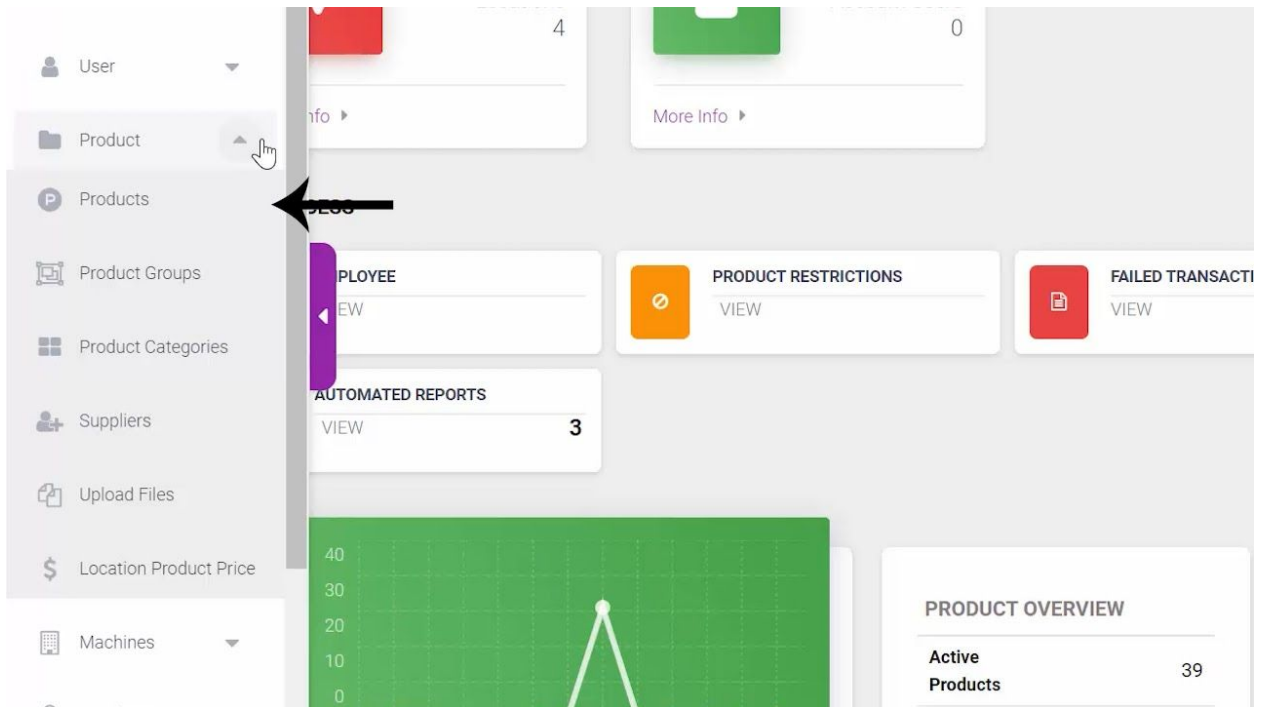
To change your password, access your user profile under the setting bar.

Products



The PRODUCTS tab provides options for:

- Products
- Product Groups
- Product Categories
- Suppliers
- Upload Files
- Location Product Price



In Products you can see your current active products.


- Account Products - products your organization has created for your account.
- Global Products - products that have been provided to your organization.





DOWNLOAD TEMPLAT

| Account Products | | Global Products | | | | |
|-------------------------|--------------|-----------------|--------|---------------|---------------|-------------------------|
| PRODUCT NAME↕ | ITEM NUMBER↕ | PRICE↕ | STATUS | PRODUCT IMAGE | DETAILS IMAGE | REQUIRE DUAL VALIDATION |
| Dariusz Hofman Scanner | 18 | 1.00 | ● | | | ✗ |
| Marlena Arnold Scanner | 13 | 1.00 | ● | | | ✗ |
| Logitech® K120 Keyboard | 205173 | 25.00 | ● | | | ✗ |
| Carol Archer Scanner | 7 | 1.00 | ● | | | ✗ |
| Pocket Calculator | SPL120CC | 5.00 | ● | | | ✗ |
| 3ft Ethernet Cable | 5231465 | 2.50 | ● | | | ✗ |





















You can edit your machines' products on the ACCOUNT PRODUCTS PAGE. On this page you can see the:

- Product Name
- Item Number
- Price
- Status
- Product Image
- Details Image
- Whether the product requires dual validation (most commonly in the medical field)
- Available for Offline Dispensing
- Returnable

ACCOUNT: WG INC JEFF FOREMAN 

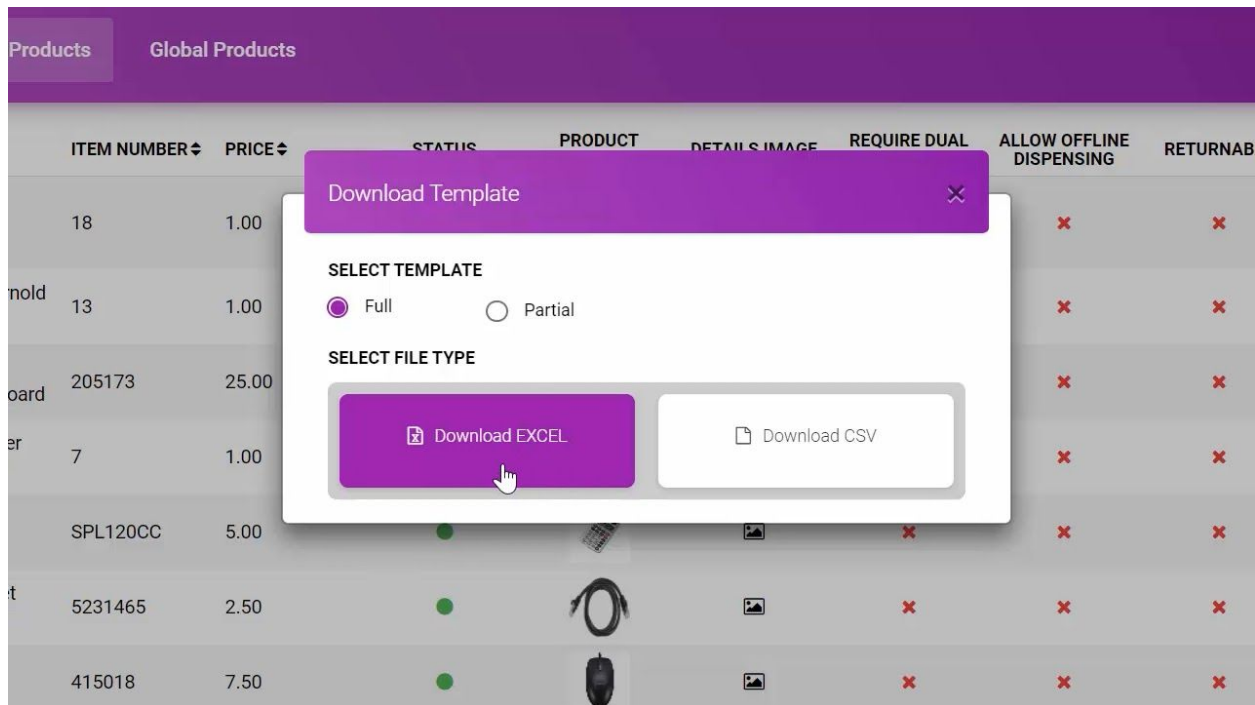
 DOWNLOAD TEMPLATE
 EXPORT
 IMPORT
 ADD NEW

ts Search

| STATUS | PRODUCT IMAGE | DETAILS IMAGE | REQUIRE DUAL VALIDATION | ALLOW OFFLINE DISPENSING | RETURNABLE | ACTIONS |
|--------------------------------------|---|---|-------------------------|--------------------------|------------|---|
| ● |  |  | ✗ | ✗ | ✗ |   |
| ● |  |  | ✗ | ✗ | ✗ |   |
| ● |  |  | ✗ | ✗ | ✗ |   |
| ● |  |  | ✗ | ✗ | ✗ |   |
| ● |  |  | ✗ | ✗ | ✗ |   |

At the top of the page you can choose to:

- Download Template
- Export Current List
- Import Template
- Add New



When you DOWNLOAD A TEMPLATE you can:

1. Pull up a full or partial template in either Excel or CSV file
2. Fill out necessary product information
3. Upload a bulk amount of products
4. Save the updated file to your computer
5. Import it into the Products Database

ACCOUNT: WG INC JEFF FOREMAN

DOWNLOAD TEMPLATE EXPORT IMPORT ADD NEW

Account Products Global Products Search

| PRODUCT NAME | ITEM NUMBER | PRICE | STATUS | PRODUCT IMAGE | DETAILS IMAGE | REQUIRE DUAL VALIDATION | ALLOW OFFLINE DISPENSING | RETURNABLE | ACTIONS |
|-------------------------|-------------|-------|--------|---------------|---------------|-------------------------|--------------------------|------------|---------|
| Dariusz Hofman Scanner | 18 | 1.00 | ● | | | ✗ | ✗ | ✗ | |
| Marlena Arnold Scanner | 13 | 1.00 | ● | | | ✗ | ✗ | ✗ | |
| Logitech® K120 Keyboard | 205173 | 25.00 | ● | | | ✗ | ✗ | ✗ | |
| Carol Archer Scanner | 7 | 1.00 | ● | | | ✗ | ✗ | ✗ | |
| Pocket Calculator | SPL120CC | 5.00 | ● | | | ✗ | ✗ | ✗ | |
| 3ft Ethernet Cable | 5231465 | 2.50 | ● | | | ✗ | ✗ | ✗ | |
| Mouse | 415018 | 7.50 | ● | | | ✗ | ✗ | ✗ | |
| Larry Webb | 3 | 1.00 | ● | | | ✗ | ✗ | ✗ | |

1 2

https://iqtechportal.com/Product/Add

To add a new individual product select ADD NEW.

ACCOUNT: WG INC JEFF FOREMAN

Add Product

Product Name

Item Number

Manufacturer

Manufacturer Item Number

Package Quantity

Product Supplier

Product Group

Category

Weight

Barcode

Default

Office

Tech

Scanners

Here you can add the needed information for the new product. When complete, select ADD PRODUCT at the bottom of the screen.

Reports

The screenshot shows a software dashboard for 'ACCOUNT: WG INC' with the user 'JEFF FOREM'. A sidebar menu on the left is open to the 'Reports' section, listing several report types. The main dashboard area contains several data cards and a chart. The 'Locations' card shows 4 locations. The 'Account Users' card shows 0 users. The 'EMPLOYEE' card shows 1 employee. The 'PRODUCT RESTRICTIONS' card has a 'VIEW' button. The 'FAILED TRANSACTIONS' card shows 0 transactions. The 'DECLINED AUTHORIZATIONS' card shows 0 authorizations. The 'AUTOMATED REPORTS' card shows 3 reports. A line chart shows usage over 24 hours, with a peak at hour 14. The 'PRODUCT OVERVIEW' table shows 39 active products and 24919 units in locker. The 'TOP' table shows revenue for 'Model Shop' at 31.00.

| Location Name | Total Quantity | Total Price |
|---------------|----------------|-------------|
| Model Shop | 31 | 31.00 |

| Product | Quantity |
|-----------------|----------|
| Active Products | 39 |
| Units in locker | 24919 |
| Top Today | Pencil |

On the Reports tab you can access:

- Pick List Report
- Transaction Report
- Usage Summary Report

- Inventory Consumption Report
- Product Location Report
- Product Specific Report
- Unsold Product Report

In each report page:

1. Select the location, machine and time frame
2. Choose to automate the report by selecting the button in the upper right hand corner
3. Select VIEW REPORT

From there, you can sort each column in ascending or descending order. The double arrow drop down button provides the ability to add columns to the report to provide more information

Across the top you can see the total costing, number of failed transactions and number of machines the report is showing information from.

ACCOUNT: WG INC

JEFF FOREMAN

EXPORT PRINT AUTOMATE

Usage Summary Report Search All Locations All Machines

Today From 06/26/2020 To 06/26/2020

GRAND TOTAL 31.00 TOTAL DISPENSED QUANTITY 31 VIEW REPORT

| LOCATION NAME | QUANTITY DISPENSED | TOTAL PRICE |
|---------------|--------------------|-------------|
| Model Shop | 31 | 31.00 |

In The Usage Summary Report you can search through different machines to view products used. When you select View Report you can see the quantity dispensed and total price at a certain location.

EXPORT PRINT AUTOMATE

Search All Locations All Machines

020 To 06/26/2020

DISPENSED QUANTITY 31

Tech Alcove
Model Shop
Main Lobby
Central Stores

VIEW REPORT

QUANTITY DISPENSED 31 TOTAL PRICE 31.00

When you select Model Shop from the LOCATIONS drop down menu and view your report, selecting this drop down arrow delivers more information about the products within the DISPENSED QUANTITY number.

ACCOUNT: WG INC JEFF FOREMAN

EXPORT PRINT AUTOMATE

Search Model Shop All Machines

To 06/26/2020

DISPENSED QUANTITY 31

VIEW REPORT

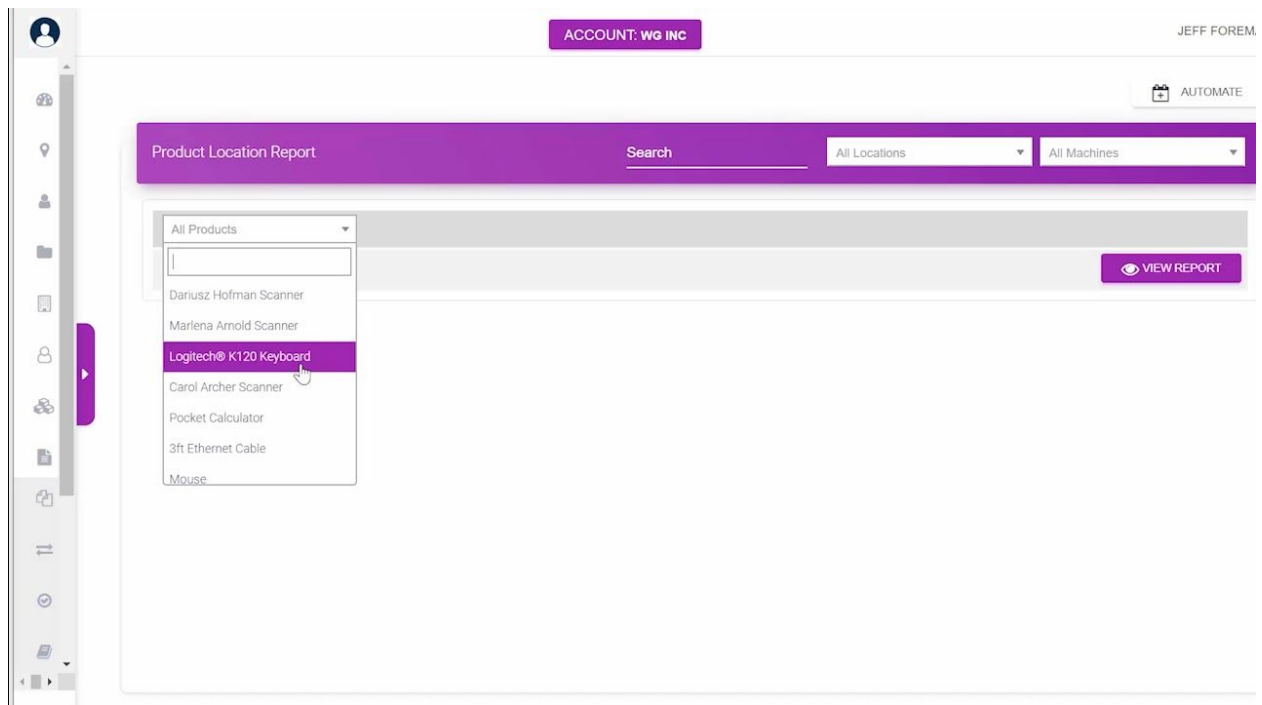
DISPENSED QUANTITY TOTAL PRICE 31.00

You can export and print the usage report here in the upper right hand corner.

The Inventory Consumption Report shows all the products dispensed within the chosen time frame. The report separates information by product group.

| ITEM NUMBER | DISPENSED QUANTITY | TOTAL PRICE |
|-------------|--------------------|-------------|
| | 24 | 24.00 |
| 156325 | 5 | 5.00 |
| 5431589 | 3 | 3.00 |
| 1982730 | 3 | 3.00 |
| LR6 | 4 | 4.00 |
| 12803 | 3 | 3.00 |
| RSP12733 | 3 | 3.00 |

There were 24 office products and 7 tech products dispensed in the time frame selected. See product group details by selecting this drop down. Here you can see the products dispensed. Here you can add fields of information to the report.



1. In The Product Location Report you can choose a product from this drop down menu to see where the product chosen has been dispensed from.
2. In this report you can see the:
 - a. Product
 - b. Location
 - c. Machine
 - d. Selection
 - e. Dispensed Quantity
 - f. Current Count
 - i. The amount of product in the machine selection shown
3. You can:
 - a. Export
 - b. Print
 - c. Automate
4. You can automate the report to send to an email address.
5. Here you can select the:
 - a. Frequency
 - b. Time

- c. Report Name
 - d. File Type
 - e. Time Zone
 - f. Who will Receive the Report
 - g. Any Additional Comments
6. Be sure to save

ACCOUNT: WG INC JEFF FOREM

EXPORT PRINT AUTOMATE

Product Location Report Search All Locations All Machines

Logitech® K120 Keyboard

CURRENT COUNT 3887 TOTAL DISPENSED QUANTITY 144 VIEW REPORT

| PRODUCT | LOCATION | MACHINE | SELECTION | DISPENSED QUANTITY | CURRENT COUNT |
|-------------------------|------------|-----------------------|-----------|--------------------|---------------|
| Logitech® K120 Keyboard | Model Shop | Model Shop - Supplies | 100 | 40 | 960 |
| Logitech® K120 Keyboard | Model Shop | Model Shop - Supplies | 120 | 15 | 985 |
| Logitech® K120 Keyboard | Model Shop | Model Shop - Supplies | 130 | 27 | 973 |
| Logitech® K120 Keyboard | Model Shop | Model Shop - Supplies | 131 | 31 | 0 |
| Logitech® K120 Keyboard | Model Shop | Model Shop - Supplies | 131 | 31 | 969 |

The Product Specific Report can search all products in a:

- Location
- Machine and Time Frame
- Specific Individual Products

When viewing the report, you can find specific information about the products including:

- Location
- Machines
- Item Number
- Dispensed Quantity
- Total Price

ACCOUNT: WG INC JEFF FOREMAN

EXPORT
 PRINT
 AUTOMATE

Search
 All Locations
 All Machines

From 06/26/2020 To 06/26/2020

DISPENSED QUANTITY 31

| | PRODUCT | ITEM NO | DISPENSED QUANTITY | TOTAL PRICE |
|----------|---|---------|--------------------|-------------|
| Supplies | Logitech® K120 Keyboard | 205173 | 1 | 1.00 |
| Supplies | Push Pins | 108237 | 3 | 3.00 |
| Supplies | Duracell AA Alkaline Batteries (2 Pack) | LR6 | 4 | 4.00 |
| Supplies | 5ft Ethernet Cable | 5208439 | 3 | 3.00 |
| Supplies | Pencil | 156325 | 5 | 5.00 |

You can export, print and automate this report as well.

ACCOUNT: WG INC JEFF FOREMAN

EXPORT
 PRINT
 AUTOMATE

Unsold Product Report Search
 All Locations
 All Machines

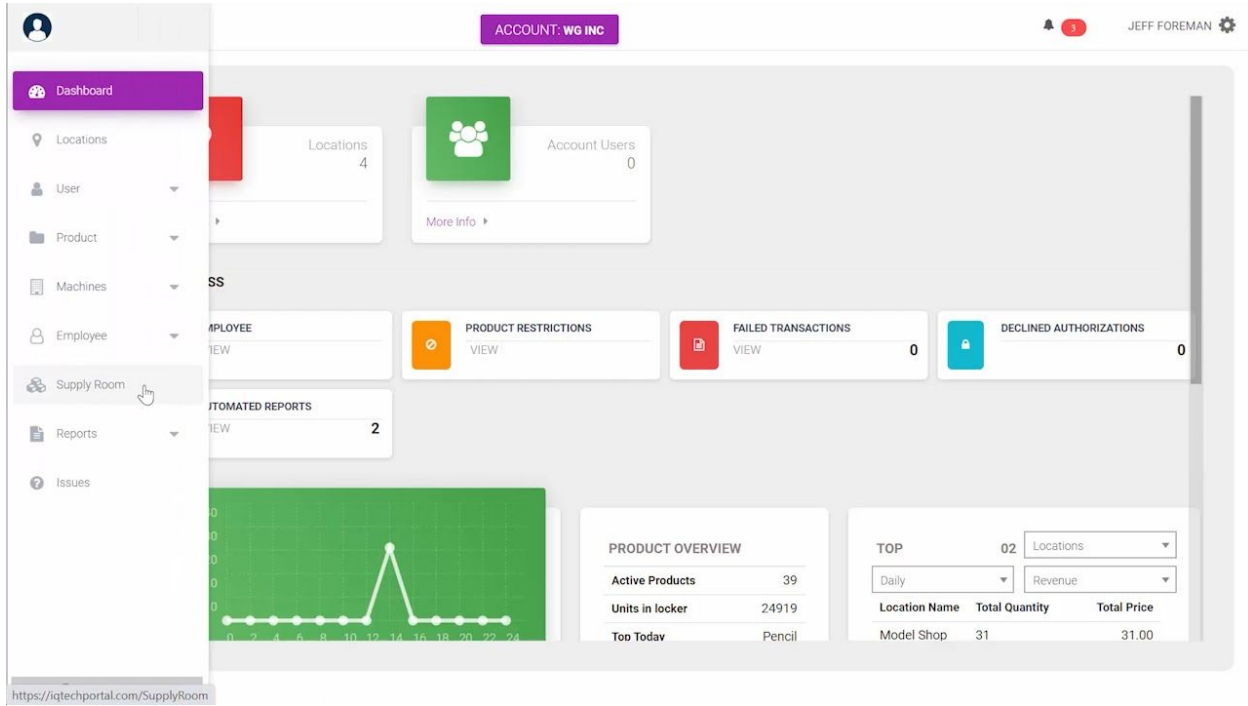
Today From 06/26/2020 To 06/26/2020

UNSOLD PRODUCT QTY 30848

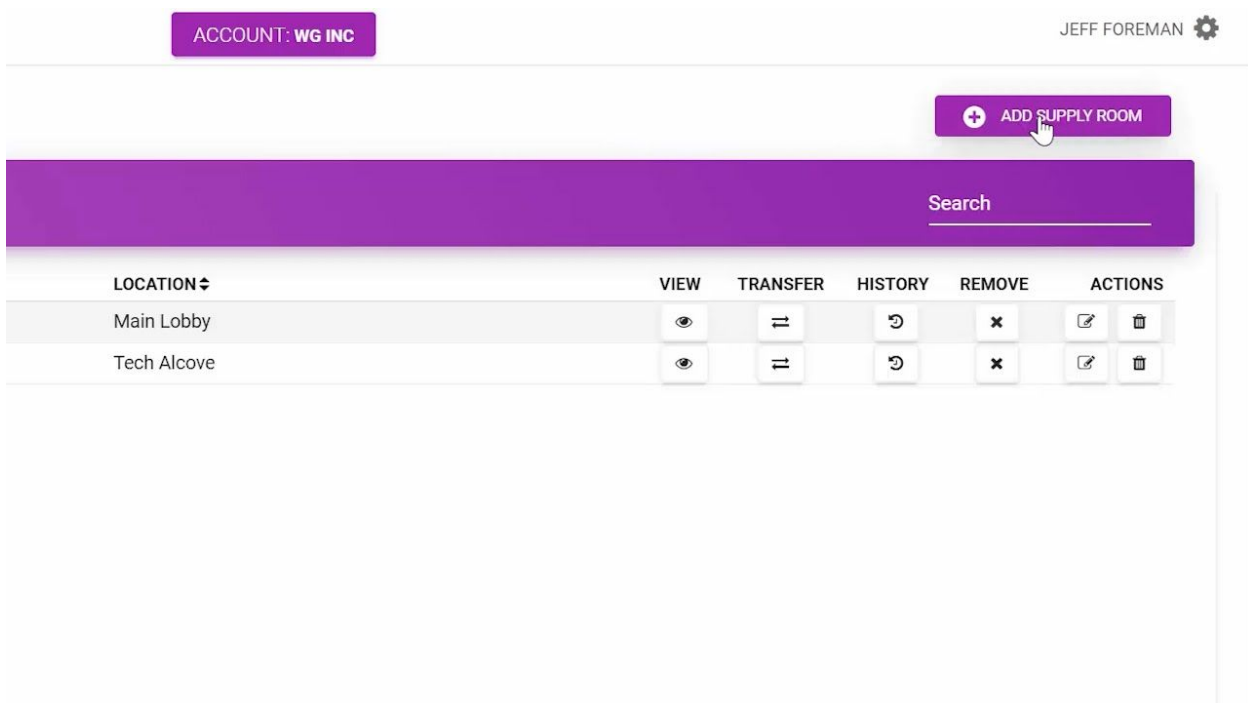
| MACHINE | ITEM | CURRENT COUNT |
|-----------------------|----------------------------------|---------------|
| Model Shop - Supplies | Pocket Calculator | 2906 |
| Model Shop - Supplies | 3ft Ethernet Cable | 975 |
| Model Shop - Supplies | Mouse | 958 |
| Model Shop - Supplies | Duracell Coppertop AAA Batteries | 960 |
| Model Shop - Supplies | Stamp | 1950 |
| Model Shop - Supplies | Staples | 1000 |
| Model Shop - Supplies | Eraser | 987 |
| Model Shop - Supplies | Notebook | 1972 |
| 54th Floor - Supplies | Pocket Calculator | 0 |
| 54th Floor - Supplies | 3ft Ethernet Cable | 30 |
| 54th Floor - Supplies | Rubber Bands | 30 |

The Unsold Product Report shows the current machine and amount of each unsold product in the machine. The total quantity of unsold product can be found here. You can sort by columns and export, print and automate this report.

Supply Room



The Supply Room tab displays the supply rooms under your account.



You can click the button in the upper right hand corner to ADD A SUPPLY ROOM. You can add a name and select a location.

Off to the right of each supply room listed you see VIEW, TRANSFER, HISTORY REMOVE AND ACTIONS options. View will show us what products are in the supply room.

The screenshot shows a web interface for managing supply rooms. At the top left, there is a purple button labeled "ACCOUNT: WG INC". At the top right, the user's name "JEFF FOREMAN" is displayed next to a gear icon. Below this, there are three buttons: a purple "TRANSFER" button with a double-headed arrow icon, a grey "REMOVE PRODUCT" button with a trash can icon, and a grey "BACK" button with a left-pointing arrow icon. A purple search bar with the text "Search" is positioned below the buttons. The main content is a table with three columns: "ITEM NUMBER", "TOTAL QUANTITY", and "PAR LEVEL". The table contains four rows of data, each with a product ID, a quantity, and a par level value in a text input field.

| ITEM NUMBER | TOTAL QUANTITY | PAR LEVEL |
|-------------|----------------|-----------|
| 5431589 | 35 | 10 |
| 504308 | 25 | 10 |
| 987465 | 10 | 10 |
| 2382439 | 85 | 0 |

The transfer button allows you to transfer products between supply rooms. The history button reveals the transfer history, the receiving history, the machine stocking history FROM this supply room or IN to this supply room. The remove button will remove product from the supply room. This action button is where you edit the supply room's name and location. This trash can icon will delete the supply room.

You can select to see ALL, GLOBAL OR LOCAL PRODUCTS. In the upper right hand corner you can transfer products, remove products or go back to the supply room list.

Supply Room Product Details

All Global Local

| PRODUCT | ITEM NUMBER | TOTAL QUANTITY |
|---------------|-------------|----------------|
| Paper Clips | 5431589 | 35 |
| Stapler | 504308 | 25 |
| Eraser | 987465 | 10 |
| Staples | 2382439 | 85 |
| Rubber Bands | 97319273 | 35 |
| Ballpoint Pen | RSP12733 | 60 |

On this Supply Room Product Detail page you can see the product name, item number, total quantity and set PAR level. When you set up your Purchase Order you can say you want to refill to PAR level and it would know the quantity you need to reach PAR level.

MAIN LOBBY - SUPPLY ROOM

Supply Room Product Transfer

Search

| PRODUCT | ITEM# | STOCK | LOT# | EXPIRATION DATE | TRANSFER QTY | REASON |
|--------------------|-----------|-------|------|-----------------|---------------------------------|--|
| Paper Clips | 5431589 | 35 | | | <input type="text" value="10"/> | <input type="button" value="Restock"/> |
| Stapler | 504308 | 25 | | | <input type="text"/> | <input type="button" value="Restock"/> |
| Eraser | 987465 | 10 | | | <input type="text"/> | <input type="button" value="Restock"/> |
| Staples | 2382439 | 85 | | | <input type="text"/> | <input type="button" value="Restock"/> |
| Rubber Bands | 97319273 | 35 | | | <input type="text"/> | <input type="button" value="Restock"/> |
| Ballpoint Pen | RSP12733 | 60 | | | <input type="text"/> | <input type="button" value="Restock"/> |
| Sticky Notes | 12803 | 35 | | | <input type="text"/> | <input type="button" value="Restock"/> |
| HD Webcam | 394303228 | 25 | | | <input type="text"/> | <input type="button" value="Restock"/> |
| Highlighter | 1982730 | 10 | | | <input type="text"/> | <input type="button" value="Restock"/> |
| Pencil | 156325 | 10 | | | <input type="text"/> | <input type="button" value="Restock"/> |
| 5ft Ethernet Cable | 5208439 | 25 | | | <input type="text"/> | <input type="button" value="Restock"/> |

When transferring excess products click the transfer button and determine how many of a certain product you would like to transfer and a reason for the transfer from this drop down menu.



| | | | | |
|----------------------------------|----------|----|----------------------|---------|
| Duracell Coppertop AAA Batteries | 10701280 | 35 | <input type="text"/> | Restock |
| Mouse | 415018 | 15 | <input type="text"/> | Restock |
| 3ft Ethernet Cable | 5231465 | 15 | <input type="text"/> | Restock |
| Pocket Calculator | SPL120CC | 25 | <input type="text"/> | Restock |
| Logitech® K120 Keyboard | 205173 | 25 | <input type="text"/> | Restock |

Select Supply Room ▼Search

- Main Lobby - Supply Room
- Tech Alcove - Supply Room ▶

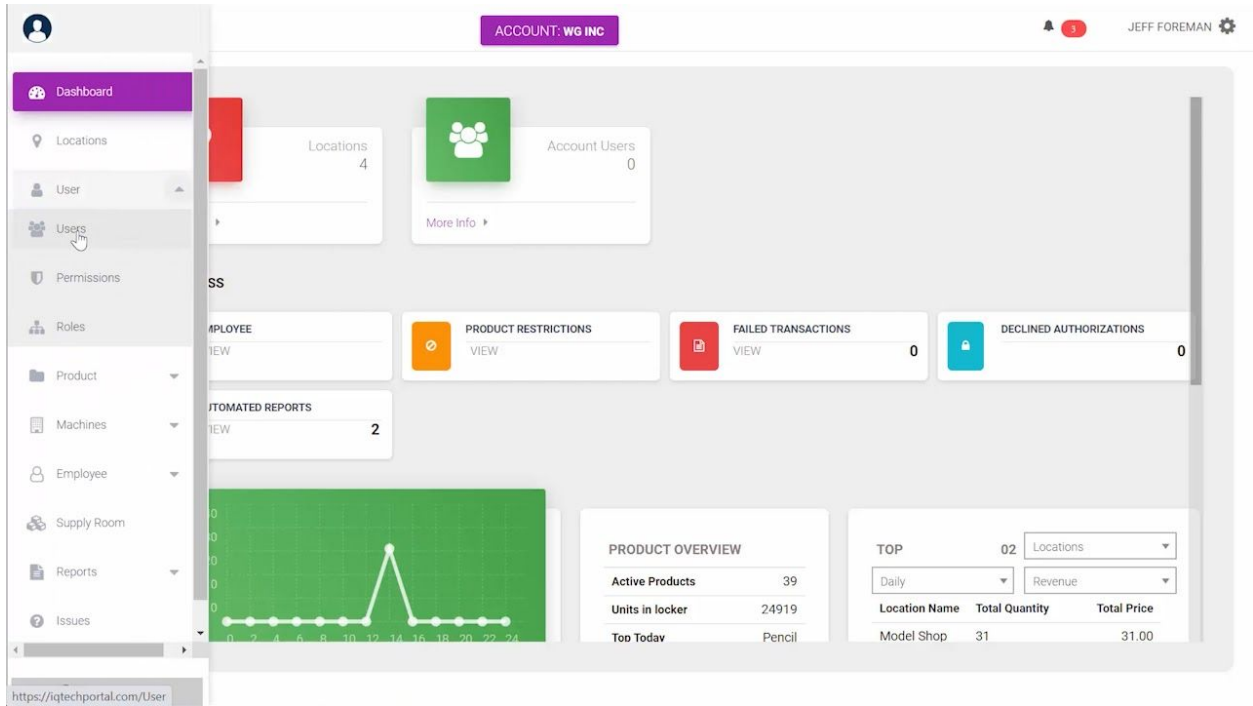
Here on the bottom you can select the supply room you would like to move the products to. Click this middle arrow button to complete the transfer. Here you can see the updated supply room paper clip quantity after the transfer.

[← BACK](#)Search

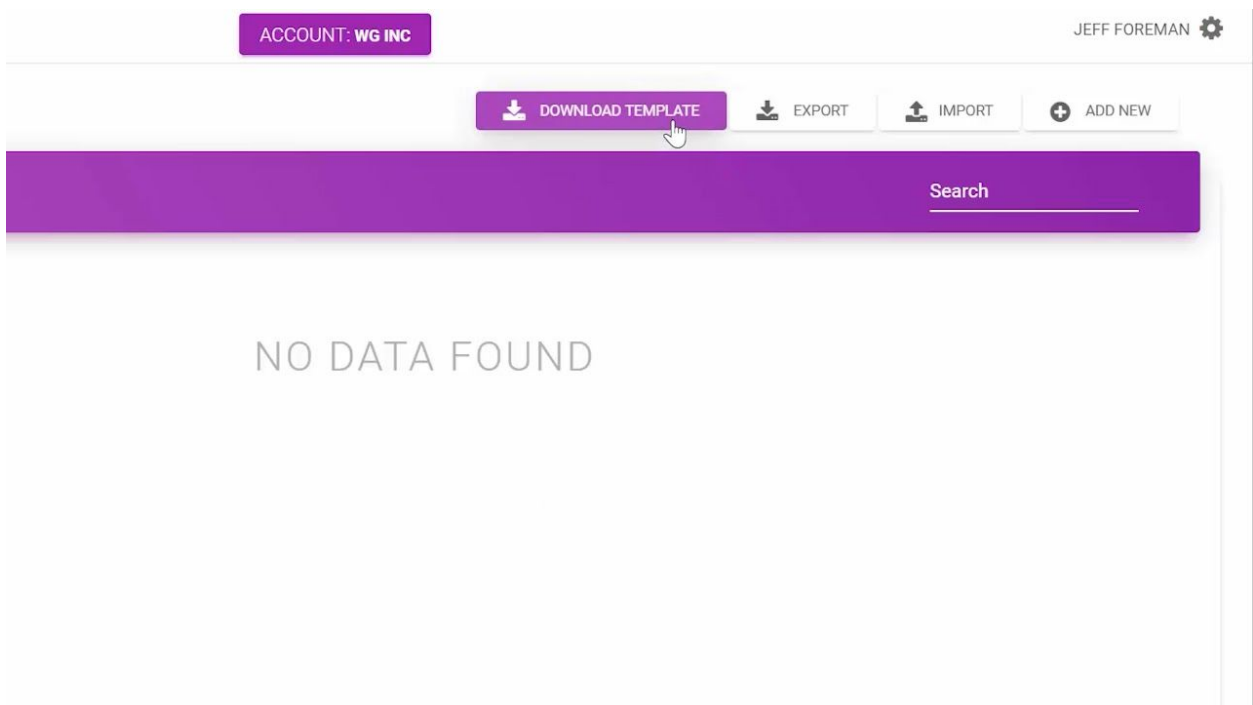
| TOTAL QUANTITY ↕ | PAR LEVEL ↕ | ACTIONS | |
|-------------------|----------------------|---|-----------------------------------|
| 25 | 10 |  | |
| EXPIRATION DATE ↕ | REMOVE QUANTITY | REASON | DESCRIPTION |
| | <input type="text"/> | Discontinued <input type="text"/> | Discontinued <input type="text"/> |
| 25 | 10 |  | |

When removing product click the remove product button here at the top and then this purple button on the right of the screen of the product you want to. Then Type in the number of the product you want to remove and the reason. Then select SAVE. Now you can see the total quantity has been updated.

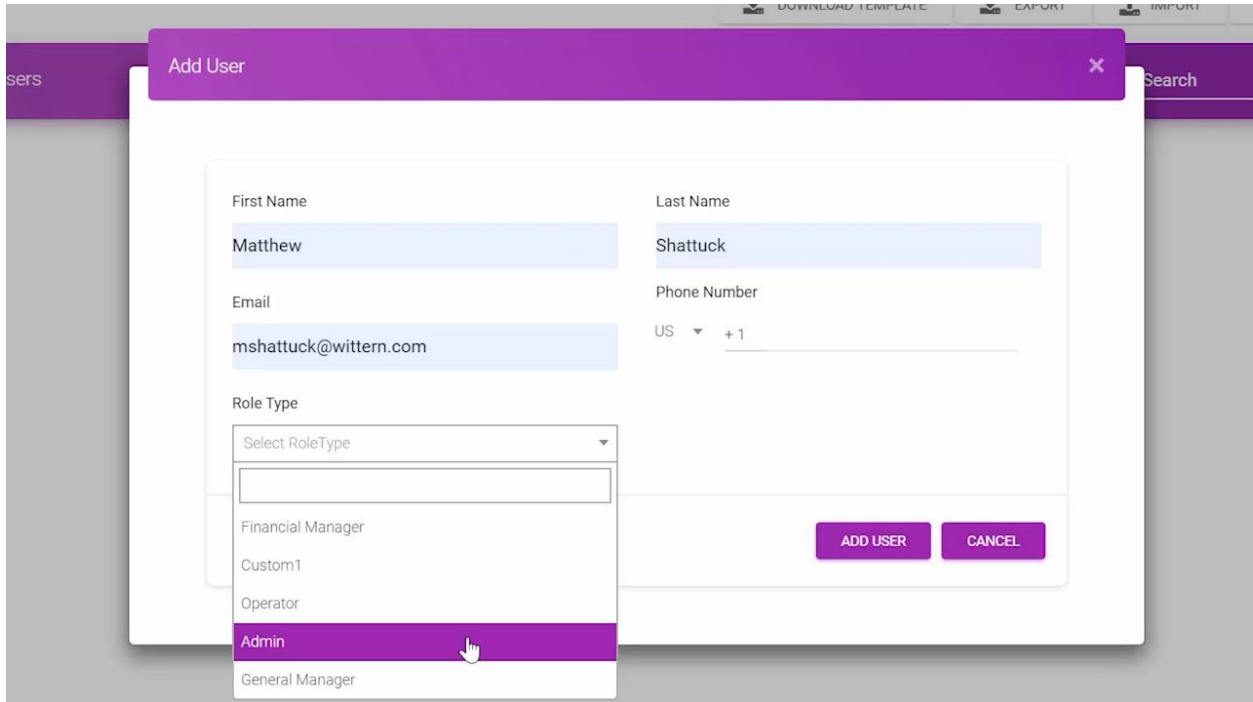
USER



To add a new user to the system select USERS under the USER drop down here on the left.

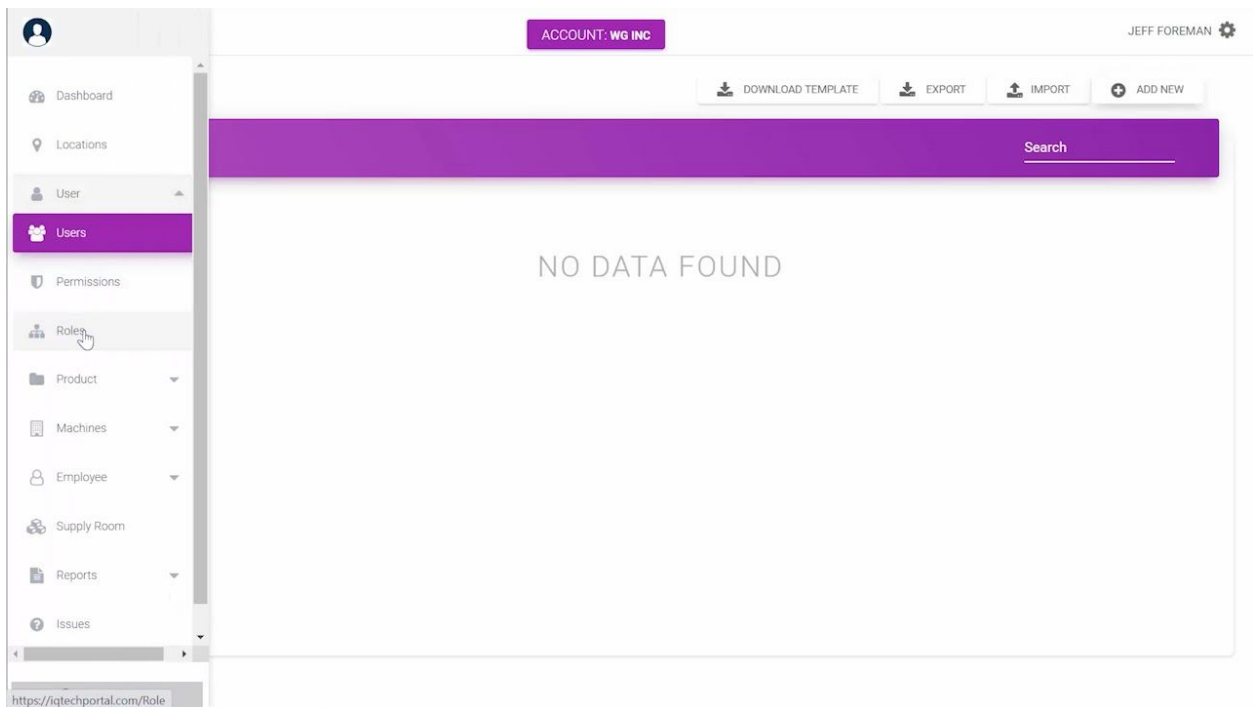


You can download a template in order to later import a bulk number of users. You can also export a list and import your list of users. To add a single user select ADD NEW.

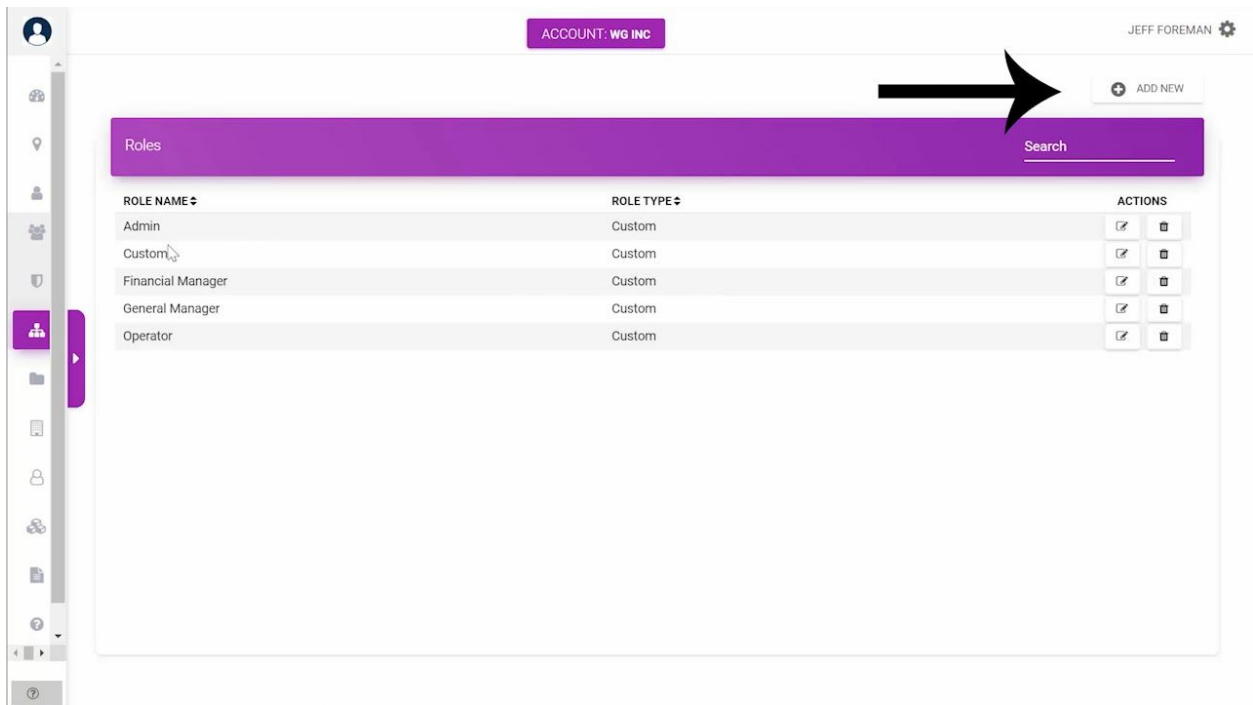


Fill out name and email, phone number is optional & role type. When complete select ADD User. You cannot duplicate users on the site.

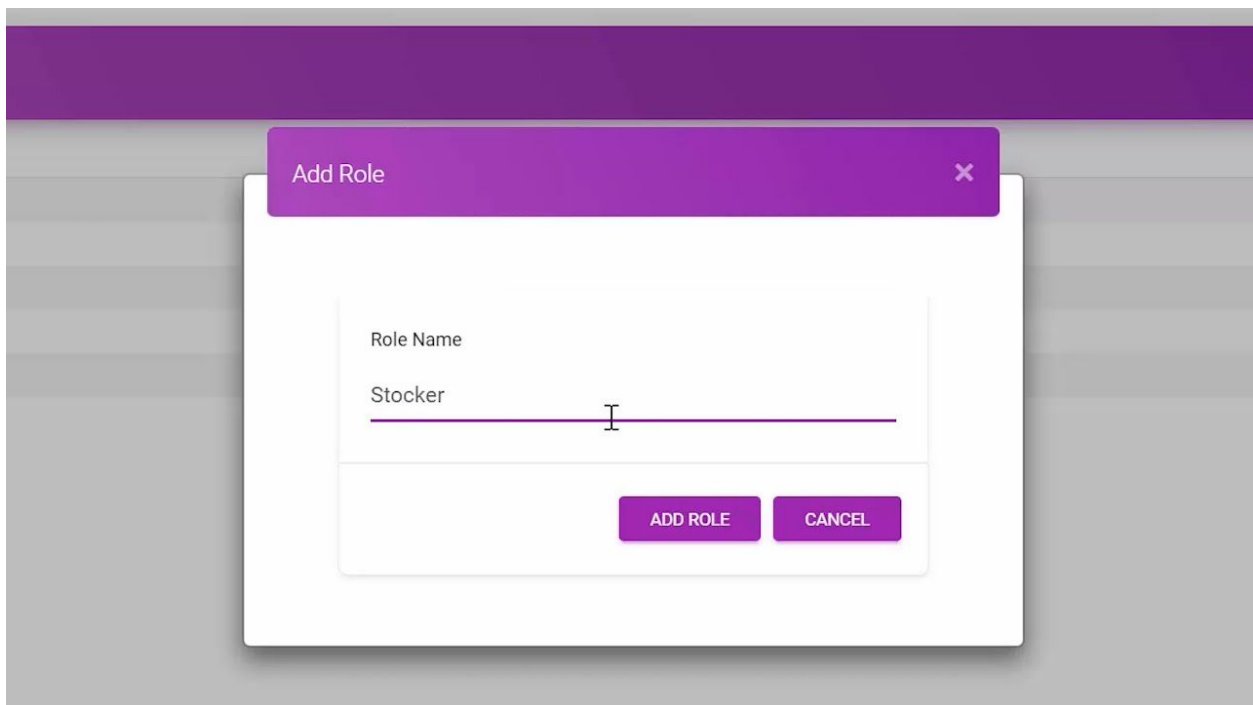
Roles



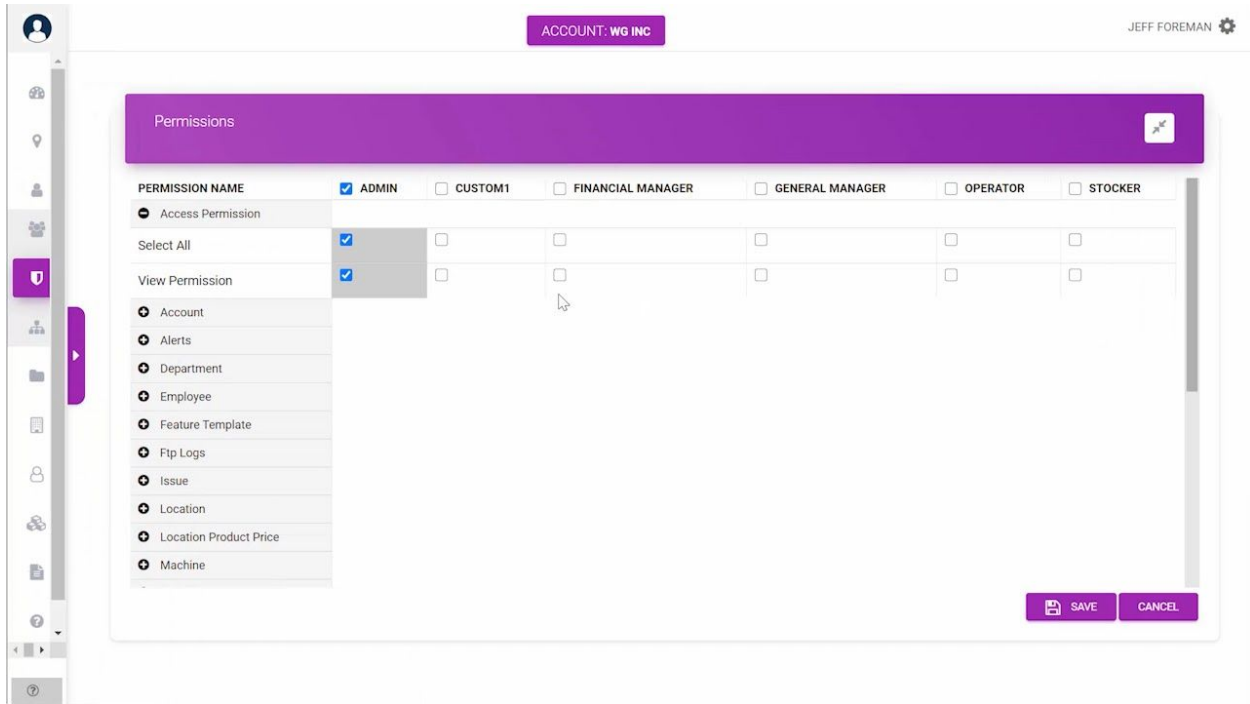
The ROLES page can also be accessed under the USER drop down menu.



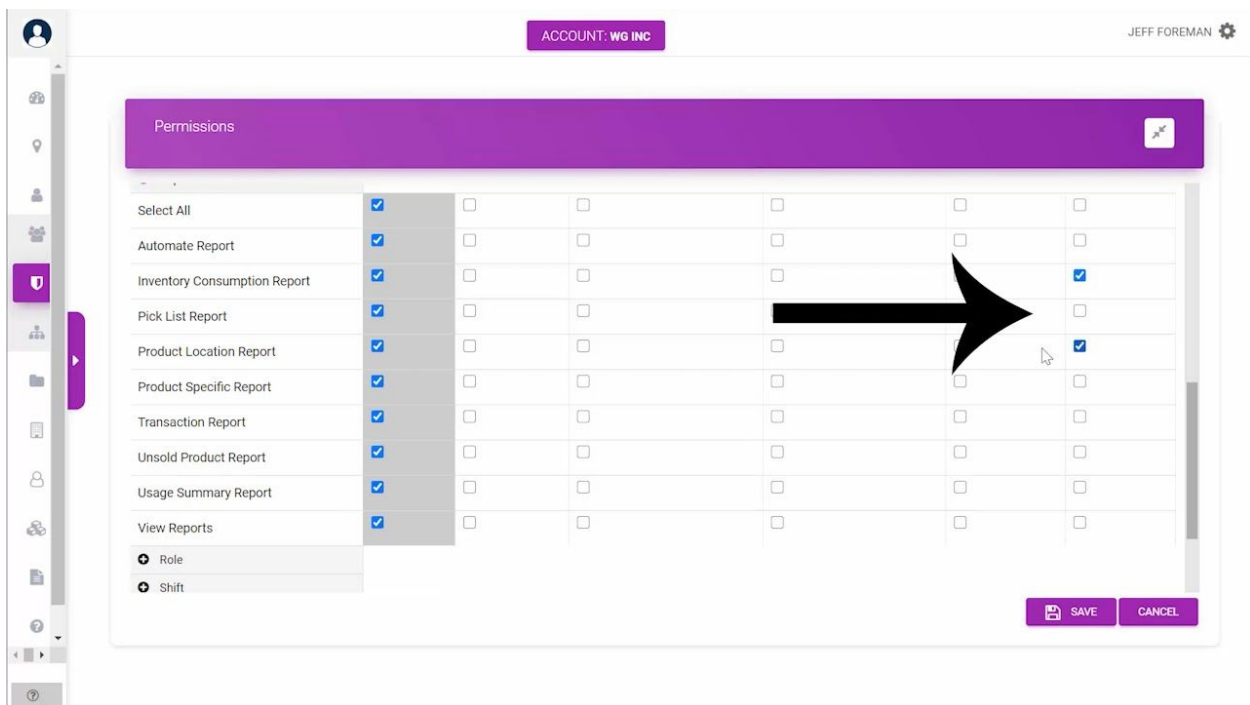
Here you can create and edit different roles available for your team. Select ADD NEW in the upper right hand corner to create a new role.



Type in the new role name and click ADD ROLE.



You can now go to the permissions page and set the necessary permissions for the new role. Here you can customize the permissions for each role.



In this example our new role will only need access to INVENTORY CONSUMPTION REPORT AND PRODUCT LOCATION REPORT. Be sure Click Save. The Stocker will now only be able to view these two pages.

ACCOUNT: WG INC JEFF FOREMAN

Permissions
✖

| PERMISSION NAME | <input checked="" type="checkbox"/> ADMIN | <input type="checkbox"/> CUSTOM1 | <input type="checkbox"/> FINANCIAL MANAGER | <input type="checkbox"/> GENERAL MANAGER | <input type="checkbox"/> OPERATOR | <input type="checkbox"/> STOCKER |
|--------------------------|---|----------------------------------|--|--|-----------------------------------|----------------------------------|
| Access Permission | | | | | | |
| Select All | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| View Permission | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Account | | | | | | |
| Select All | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Add Account | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Delete Account | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit Account | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| View Account | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Alerts | | | | | | |
| Select All | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Send Alert List | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

SAVE
CANCEL

These arrows in the upper right hand corner will close all the expanded permission name categories on the left. Clicking the arrows now will expand every category. You can also minimize and expand individual categories

ISSUES

- 🏠 Machines
- 👤 Employee
- 📦 Supply Room
- 📄 Purchase Order
- 📄 Reports
- ❓ Issues

ISSUES

EMPLOYEE

VIEW

PRODUCT RESTRICTIONS

VIEW

FAILED TRANSACTIONS

VIEW

AUTOMATED REPORTS

VIEW 2

PRODUCT OVERVIEW

| | |
|-----------------|--------|
| Active Products | 39 |
| Units in locker | 24919 |
| Top Today | Pencil |

❓
REPORT ISSUE

- On the vertical tab on the left you will find the ISSUES option on the bottom as well as the purple REPORT ISSUES button on the very bottom.
- The issues tab is where you can see the current status of any issues already reported. The purple button on the bottom here is for reporting new issues.

Report Your Issue

Serial Number
1234567

Frequency of Issue
Daily

Type of Issue
Hardware

Type of Solution
Office + Tech


Tell us about the issue
My employees do not have access to the machine anymore. Please Help.

SEND

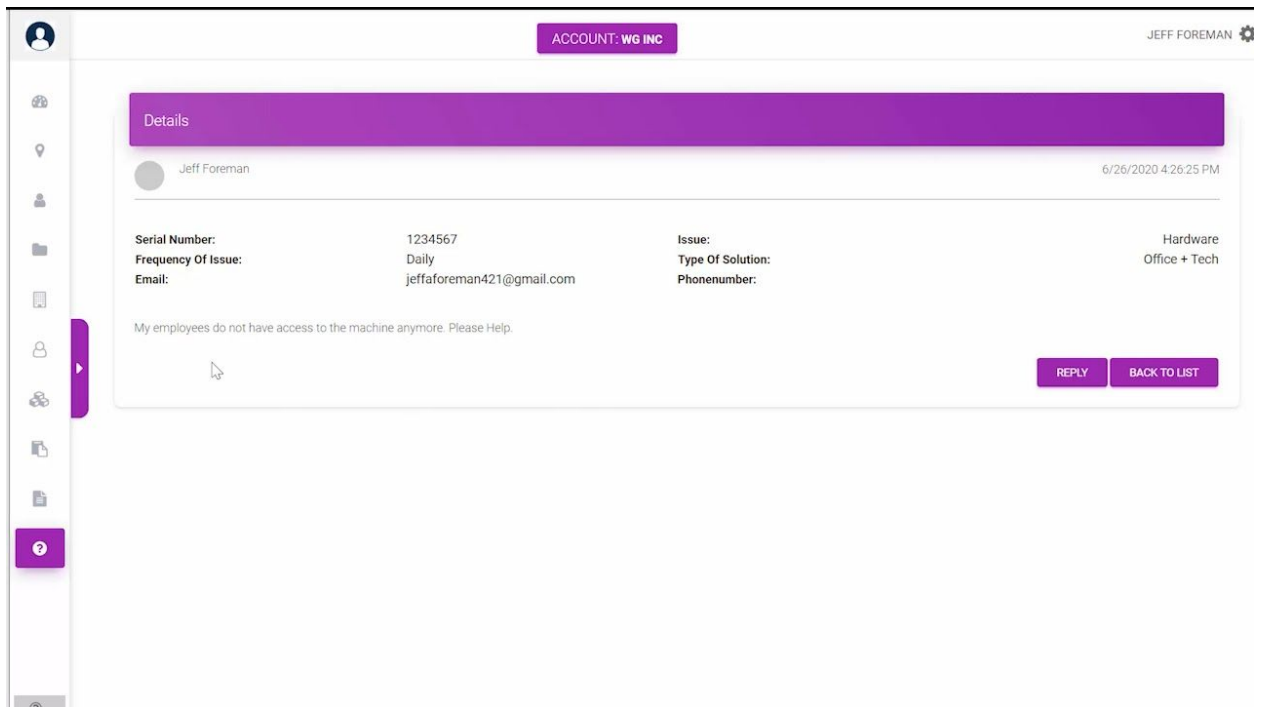
1. Be sure to include:
 - a. Serial number
 - b. Frequency of issues
 - c. Type of issue
 - d. Type of solution
 - e. Other necessary information for resolving the issue.
2. When these fields are complete, hit send.

| Open Fixed | | | |
|--------------------------------------|-----------------|-----------------|----------------------|
| NAME ↕ | TYPE OF ISSUE ↕ | SERIAL NUMBER ↕ | TIME ↕ |
| Jeff Foreman | Hardware | 1234567 | 6/26/2020 4:26:25 PM |

- The report goes into the issues queue and can now be viewed on the issues page under the OPEN section.

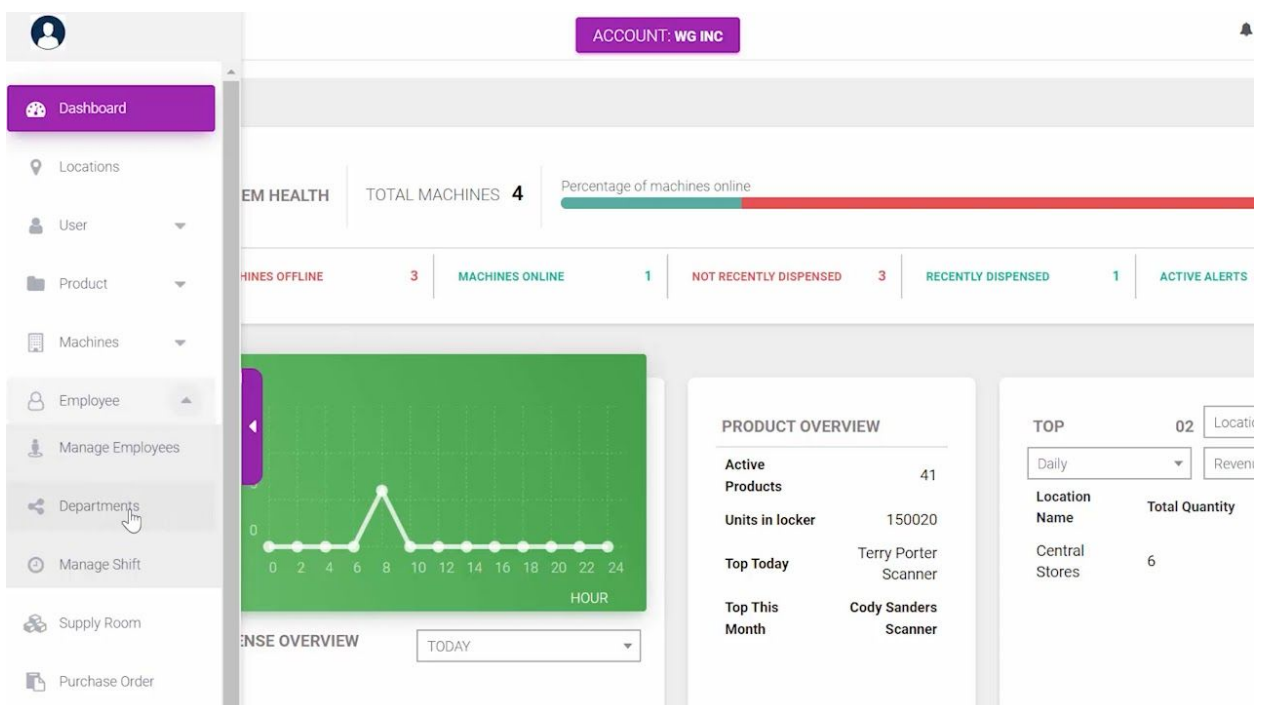
| + ADD NEW Search | | | |
|--|-----------------|----------------------|---|
| TYPE OF ISSUE ↕ | SERIAL NUMBER ↕ | TIME ↕ | ACTION |
| Hardware | 1234567 | 6/26/2020 4:26:25 PM |  |

- Clicking on the eye here on the right will allow you to view more on the issue.



- The IQ Technology Support team will be in contact with the user who submitted the issue. You can view the issues that have been resolved or fixed by selecting the fixed page.

Departments



- Follow these steps to use the Departments menu under the Employee tab.

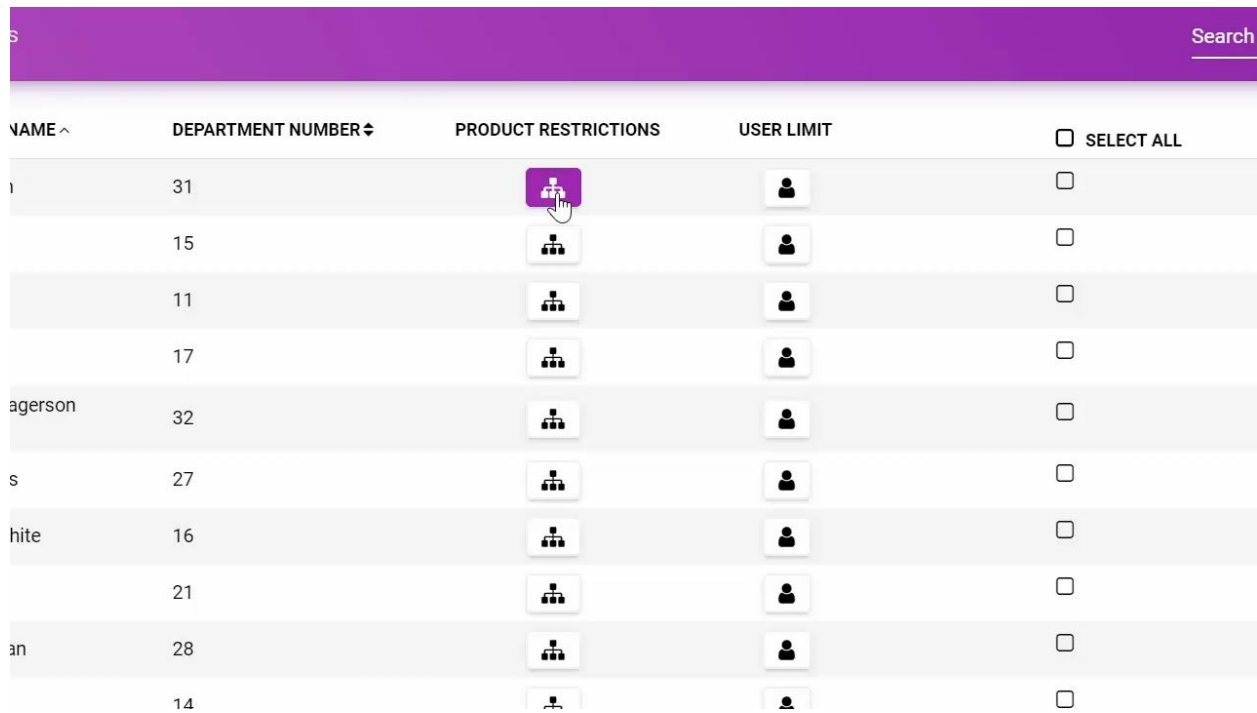
| Departments | | | | |
|------------------------------|---------------------|----------------------|------------|-------------------------------------|
| DEPARTMENT NAME ^ | DEPARTMENT NUMBER ⇅ | PRODUCT RESTRICTIONS | USER LIMIT | <input type="checkbox"/> SELECT ALL |
| Administration | 31 | | | <input type="checkbox"/> |
| Alan Hopkins | 15 | | | <input type="checkbox"/> |
| Bradley Weir | 11 | | | <input type="checkbox"/> |
| Carol Archer | 17 | | | <input type="checkbox"/> |
| Chad Sarver Jagerson Scanner | 32 | | | <input type="checkbox"/> |
| Chris Moraetes | 27 | | | <input type="checkbox"/> |
| Christopher White | 16 | | | <input type="checkbox"/> |
| Cody Sanders | 21 | | | <input type="checkbox"/> |
| Dariusz Hofman | 28 | | | <input type="checkbox"/> |
| Dennis Davis | 14 | | | <input type="checkbox"/> |





















1. On this page you will see the department names and department numbers. You will also see links to pages that allow you to edit the department's product restrictions and user limit. Under Select ALL you can do a bulk assign, and under actions you can edit the department's name & number or delete the department.

ACCOUNT: WG INC JEFF FOREMAN ⚙️

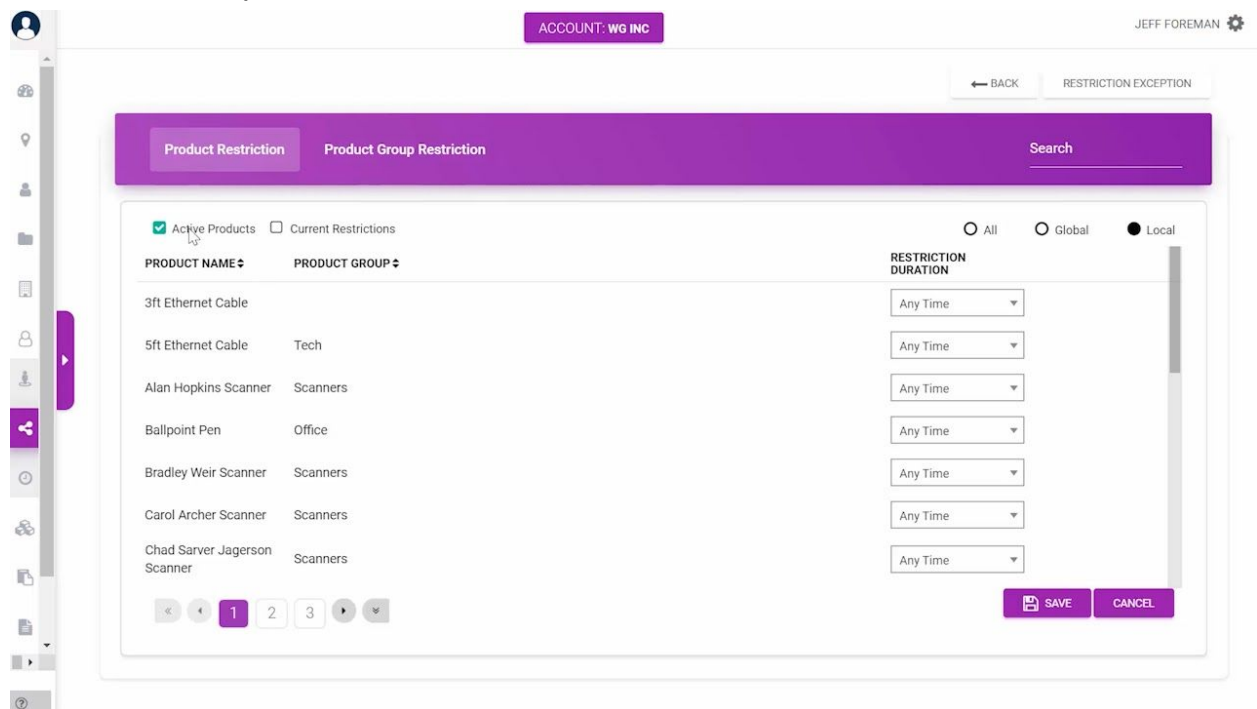
| Search | | | | |
|---------------------|----------------------|------------|-------------------------------------|---------|
| DEPARTMENT NUMBER ⇅ | PRODUCT RESTRICTIONS | USER LIMIT | <input type="checkbox"/> SELECT ALL | ACTIONS |
| 1 | | | <input type="checkbox"/> | |
| 5 | | | <input type="checkbox"/> | |
| 1 | | | <input type="checkbox"/> | |
| 7 | | | <input type="checkbox"/> | |
| 2 | | | <input type="checkbox"/> | |
| 7 | | | <input type="checkbox"/> | |
| 5 | | | <input type="checkbox"/> | |
| 1 | | | <input type="checkbox"/> | |

2. Up here you can assign an employee to a department or add a new department.



| NAME ^ | DEPARTMENT NUMBER ⇅ | PRODUCT RESTRICTIONS | USER LIMIT | <input type="checkbox"/> SELECT ALL |
|----------|---------------------|--|--|-------------------------------------|
| | 31 |  |  | <input type="checkbox"/> |
| | 15 |  |  | <input type="checkbox"/> |
| | 11 |  |  | <input type="checkbox"/> |
| | 17 |  |  | <input type="checkbox"/> |
| Jagerson | 32 |  |  | <input type="checkbox"/> |
| s | 27 |  |  | <input type="checkbox"/> |
| hite | 16 |  |  | <input type="checkbox"/> |
| | 21 |  |  | <input type="checkbox"/> |
| an | 28 |  |  | <input type="checkbox"/> |
| | 14 |  |  | <input type="checkbox"/> |

3. Selecting the Product Restrictions button shows all the products that are active for this department.



ACCOUNT: WG INC JEFF FOREMAN ⚙

← BACK RESTRICTION EXCEPTION

Product Restriction Product Group Restriction Search

Active Products Current Restrictions

All Global Local

| PRODUCT NAME ⇅ | PRODUCT GROUP ⇅ | RESTRICTION DURATION |
|------------------------------|-----------------|----------------------|
| 3ft Ethernet Cable | | Any Time |
| 5ft Ethernet Cable | Tech | Any Time |
| Alan Hopkins Scanner | Scanners | Any Time |
| Ballpoint Pen | Office | Any Time |
| Bradley Weir Scanner | Scanners | Any Time |
| Carol Archer Scanner | Scanners | Any Time |
| Chad Sarver Jagerson Scanner | Scanners | Any Time |

1 2 3

SAVE CANCEL

4. For each product you can limit the department's access to a certain quantity over a period of time.

Product Group Restriction

Products Current Restrictions

RESTRICTION DURATION

May Not Dispense

Hour

Shift

Day

Week

Month

Any Time

| AME | PRODUCT GROUP | RESTRICTION DURATION |
|------------|---------------|----------------------|
| t Cable | | May Not Dispense |
| t Cable | Tech | Hour |
| ns Scanner | Scanners | May Not Dispense |
| en | Office | Hour |
| ir Scanner | Scanners | May Not Dispense |
| r Scanner | Scanners | May Not Dispense |
| r Jagerson | Scanners | May Not Dispense |

5. Set duration and limit for the desired product.

| NAME | DEPARTMENT NUMBER | PRODUCT RESTRICTIONS | USER LIMIT | SELECT ALL |
|----------|-------------------|----------------------|------------|--------------------------|
| | 31 | | | <input type="checkbox"/> |
| | 15 | | | <input type="checkbox"/> |
| | 11 | | | <input type="checkbox"/> |
| | 17 | | | <input type="checkbox"/> |
| Jagerson | 32 | | | <input type="checkbox"/> |
| s | 27 | | | <input type="checkbox"/> |
| hite | 16 | | | <input type="checkbox"/> |
| | 21 | | | <input type="checkbox"/> |
| an | 28 | | | <input type="checkbox"/> |
| | 14 | | | <input type="checkbox"/> |

The User Limit includes questions that will be asked of employees at the machine level before items are dispensed. Checking the box on the left turns on dual validation settings which require employees to enter their employee pin at the machine AFTER they already scan their badge or enter their ID number.

Administration

Number of items employees can select during each vend session 10

NO DATA FOUND

The number of items employees can select during each vend session can be set here to whatever number you like.

When finished click UPDATE.

You can select other department user limits to edit at drop down menu on the right.

To add new user limits for this department select ADD NEW.

Add User Limit

Question Name

Job #

Dispense Type

Pre Dispense

Prompt

Select Prompt

Enabled

Disabled

QUESTION

English

Here you can create question prompts for either PRE and POST dispensing.

Type in Question Name..

Then whether the question is for PRE or POST Dispense.

Selecting Predefined Answer here will limit the user to a certain answer at the machine.

Define acceptable answers at the machine down here.

Prompt

Enabled x ▾

Any Answer Predefined Answer

QUESTION

English ↖

Enter Job #

Spanish

French

Then type in the question or prompt in the language preferred.
Click ADD user limit when complete.

Administration ▾

Number of items employees can select during each vend session ✓ UPDATE

| DISPENSE TYPE ▾ | PROMPT STATUS | QUESTIONS | ACTIONS | | | | | | |
|-----------------|---|--|---------|---------------|---------|---|--------|---|--|
| Pre Dispense | ✓ | <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; border-right: 1px solid #ccc; padding: 2px;">ENGLISH</td> <td style="padding: 2px;">? Enter Job #</td> </tr> <tr> <td style="border-right: 1px solid #ccc; padding: 2px;">SPANISH</td> <td style="padding: 2px;">?</td> </tr> <tr> <td style="border-right: 1px solid #ccc; padding: 2px;">FRENCH</td> <td style="padding: 2px;">?</td> </tr> </table> | ENGLISH | ? Enter Job # | SPANISH | ? | FRENCH | ? | ✎ 🗑️ |
| ENGLISH | ? Enter Job # | | | | | | | | |
| SPANISH | ? | | | | | | | | |
| FRENCH | ? | | | | | | | | |

Now see the new user limit appear here. On the right under actions You can edit the user limit or delete it

All employees in this department will receive this question after entering their ID information.

Employees

The screenshot shows a dashboard for 'ACCOUNT: WG INC'. On the left, a navigation menu is open, highlighting the 'Employee' tab. Under this tab, the 'Manage Employees' option is selected. The main dashboard area displays a 'SYSTEM HEALTH' section with 'TOTAL MACHINES 4' and a 'Percentage of machines online' progress bar. Below this, a summary row shows: 'MACHINES OFFLINE 3', 'MACHINES ONLINE 1', 'NOT RECENTLY DISPENSED 3', 'RECENTLY DISPENSED 1', and 'ACTIVE ALERTS'. A line graph shows a peak at hour 8. To the right, a 'PRODUCT OVERVIEW' table lists 'Active Products' (41), 'Units in locker' (150020), 'Top Today' (Terry Porter Scanner), and 'Top This Month' (Cody Sanders Scanner). Further right, a 'TOP' table shows 'Location Name' and 'Total Quantity' for 'Central Stores' (6).

Follow these steps to use the Manage Employees menu under the Employee tab.

ACCOUNT: WG INC

DOWNLOAD TEMPLATE EXPORT IMPO

Employees Show All Employees Search

| LAST | FIRST | EMAIL | EMP # | BADGE # | LANG | DEPT | ACTIVE | FINGERPRINT / IGNORE | | PIN | |
|---------|-----------|----------------------|--------|---------|---------|----------------|-------------------------------------|-------------------------------------|--------------------------|-------|-------|
| Amos | Glenn | employee28@dfb55.com | 1028 | 7028 | English | HR | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | RESET | CLEAR |
| Amos | Sara | employee76@dfb55.com | 1076 | 7076 | English | Marketing | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | RESET | CLEAR |
| Archer | Carol | | 85244 | 85244 | English | Carol Archer | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | RESET | CLEAR |
| Arnold | Marlena | | 100315 | 100315 | English | Marlena Arnold | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | RESET | CLEAR |
| Availa | Muhammed | employee37@dfb55.com | 1037 | 7037 | English | HR | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | RESET | CLEAR |
| Belvins | Josephine | employee51@dfb55.com | 1051 | 7051 | English | Sales | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | RESET | CLEAR |
| Bernard | Ben | employee49@dfb55.com | 1049 | 7049 | English | HR | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | RESET | CLEAR |

Here is a list of the current employees with access to the machine products.

ACCOUNT: WG INC

JEFF FOREMAN

DOWNLOAD TEMPLATE EXPORT IMPORT ADD NEW

Show All Employees Search





| LANG | DEPT | ACTIVE | FINGERPRINT / IGNORE | | PIN | | ACTION |
|---------|--------------|-------------------------------------|-------------------------------------|--------------------------|-------|-------|--------|
| English | HR | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | RESET | CLEAR | |
| English | Marketing | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | RESET | CLEAR | |
| English | Carol Archer | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | RESET | CLEAR | |
| English | Marlena | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | RESET | CLEAR | |

To download an excel template for users to fill out click here. Click to Import the file here.

Export the current employee list here.


DOWNLOAD TEMPLATE EXPORT IMPORT **+ ADD NEW**

Show All Employees Search

| LANG | DEPT | ACTIVE | FINGERPRINT / IGNORE | PIN | ACTION |
|---------|--------------|-------------------------------------|--|-------------|---|
| English | HR | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| English | Marketing | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| English | Carol Archer | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| English | Marlena | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |

To simply add a single employee click ADD NEW.








ACCOUNT: WG INC

Add Employee 


| | |
|--------------------------------------|--|
| First Name | Last Name |
| <input type="text"/> | <input type="text"/> |
| Employee Number | Email |
| <input type="text"/> | <input type="text"/> |
| Badge Number | Manager Email |
| <input type="text"/> | <input type="text"/> |
| Language | Department |
| <input type="text" value="English"/> | <input type="text" value="Select Department"/> |





Add employee information on this screen.

Be sure to click add employee when complete and it will be added to your employee list.






| BADGE # | LANG | DEPT | ACTIVE | FINGERPRINT / IGNORE | PIN | ACTION |
|---------|---------|----------------|-------------------------------------|--|-------------|--|
| 7028 | English | HR | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| 7076 | English | Marketing | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| 85244 | English | Carol Archer | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| 100315 | English | Marlena Arnold | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| 7037 | English | HR | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| 7051 | English | Sales | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| 7049 | English | HR | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |

Click the edit button in the Action column to edit a specific employee's information. Click Update Employee when complete.

ACCOUNT: WG INC
JEFF FOREMAN 

 DOWNLOAD TEMPLATE
 EXPORT
 IMPORT
 ADD NEW

Show All Employees
 ↓

| IP # | BADGE # | LANG | DEPT | ACTIVE | FINGERPRINT / IGNORE | PIN | ACTION |
|------|---------|---------|----------------|-------------------------------------|--|-------------|---|
| 28 | 7028 | English | HR | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| 76 | 7076 | English | Marketing | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| 244 | 85244 | English | Carol Archer | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| 0315 | 100315 | English | Marlena Arnold | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |
| 37 | 7037 | English | HR | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="checkbox"/> | RESET CLEAR |  |

You can reset or clear employee pin numbers here. If you click reset, the employee will be asked to set a new pin after already scanning their ID or entering their ID number.

Show All Employees

| # | BADGE # | LANG | DEPT | ACTIVE | FINGERPRINT / IGNORE | PIN |
|----|---------|---------|----------------|--------|----------------------------|-------------|
| | 7028 | English | HR | | ✗ <input type="checkbox"/> | RESET CLEAR |
| | 7076 | English | Marketing | | ✗ <input type="checkbox"/> | RESET CLEAR |
| 4 | 85244 | English | Carol Archer | | ✗ <input type="checkbox"/> | RESET CLEAR |
| 15 | 100315 | English | Marlena Arnold | | ✗ <input type="checkbox"/> | RESET CLEAR |

Click the purple bar under the ACTIVE column to deactivate an employee and remove them from the active list.

ACCOUNT: WG INC

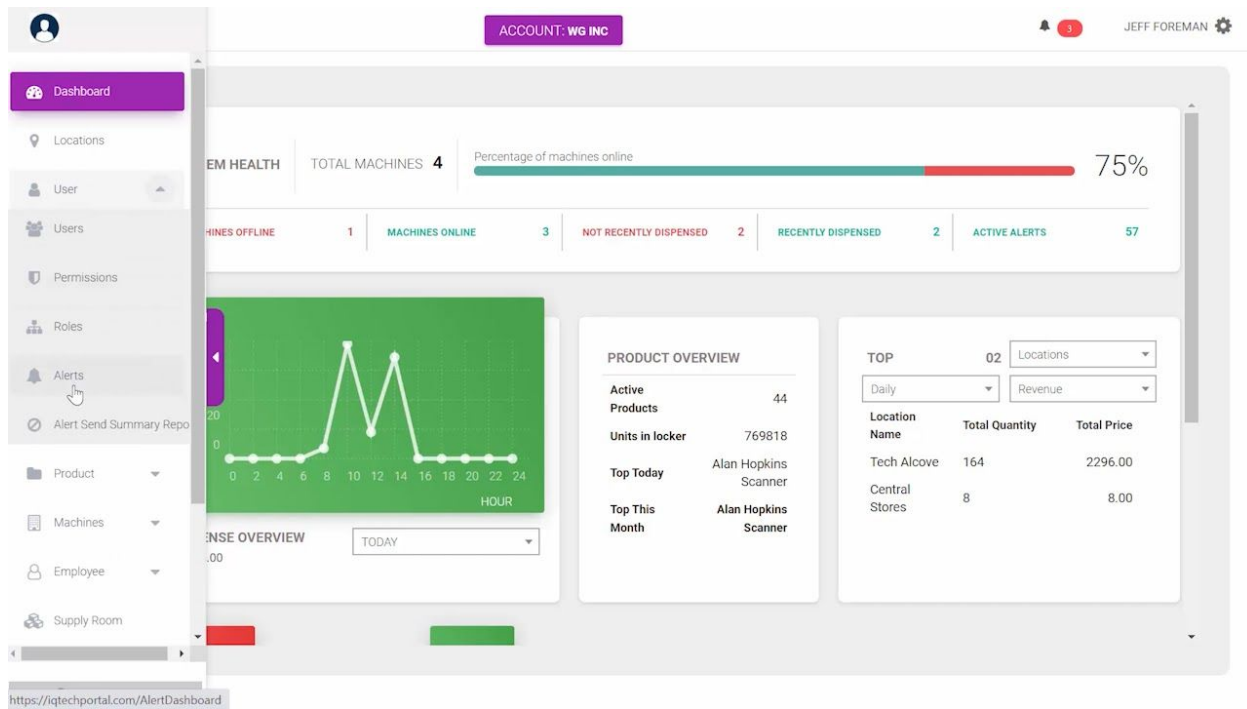
Employees

Show All Employees

| LAST | FIRST | EMAIL | EMP # | BADGE # | LANG | DEPT | ACTIVE | FINGERPRINT / IGNORE | PIN |
|--------|----------|----------------------|--------|---------|---------|----------------|--------|----------------------------|-------------|
| Amos | Glenn | employee28@dfb55.com | 1028 | 7028 | English | HR | | ✗ <input type="checkbox"/> | RESET CLEAR |
| Amos | Sara | employee76@dfb55.com | 1076 | 7076 | English | Marketing | | ✗ <input type="checkbox"/> | RESET CLEAR |
| Archer | Carol | | 85244 | 85244 | English | Carol Archer | | ✗ <input type="checkbox"/> | RESET CLEAR |
| Arnold | Marlena | | 100315 | 100315 | English | Marlena Arnold | | ✗ <input type="checkbox"/> | RESET CLEAR |
| Availa | Muhammad | employee37@dfb55.com | 1037 | 7037 | English | HR | | ✗ <input type="checkbox"/> | RESET CLEAR |
| Beer | Kierra | employee91@dfb55.com | 1091 | 7091 | English | Marketing | | ✗ <input type="checkbox"/> | RESET CLEAR |

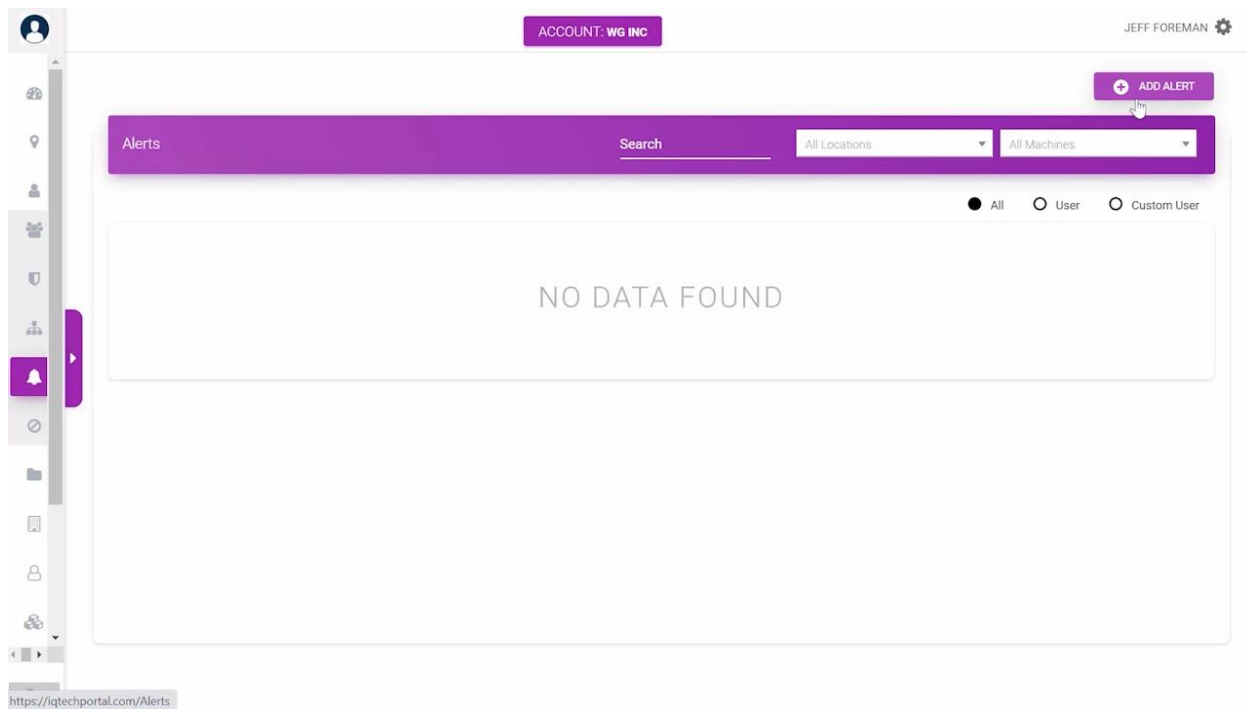
To see all employees, check the SHOW ALL EMPLOYEES BOX here. Activate an employee by selecting the grey bar under the Active column. Unchecking the SHOW ALL EMPLOYEES box will show only Active employees.

Alerts



Follow these steps to use the IQ Software Alerts page.

1. On your IQ Dashboard page go to the tab on the left. Go to Users and select Alerts.



2. On the Alerts page you can see what Alerts have been created and Add new Alerts.
3. To add a new alert, click the ADD ALERT button in the upper righthand corner of the page.

4. You can customize the new alert for a certain location or machine:
 - a. Name the alert
 - b. Select the items you want to be alerted on
 5. You can be alerted when:
 - a. A product within a machine reaches a designated CRITICAL LEVEL or LOW LEVEL
 - b. A machine is out of service
 - c. A machine experiences a failed transaction
 - d. The door is open
 - e. A network error occurs
 - f. No Pulse - machine is unable to communicate with the software within a certain time frame
 - g. The machine is unable to communicate with the software within a certain time frame
 - h. The machine goes above or below a certain temperature
 - i. When any product is set to expire within a certain number of days
- Below is the Product Alerts section

Alert Name
Low Inventory

SELECT ALL CRITICAL LEVEL LOW LEVEL

OUT OF SERVICE FAILED TRANSACTION DOOR OPEN

NETWORK ERROR NO PULSE IN TEMPERATURE

PRODUCT EXP IN 3 DAYS

Product Alert List

All Global Local

Select Product

ADD TO LIST

| PRODUCT | ALERT |
|-------------------------|-------|
| Dariusz Hofman Scanner | |
| Marlena Arnold Scanner | |
| Logitech® K120 Keyboard | |
| Steven Steil Scanner | |
| Carol Archer Scanner | |
| Pocket Calculator | |
| 3ft Ethernet Cable | |
| Select Product | |

User Alert Level List

- Here you can choose a product and then be alerted when it is dispensed, or not dispensed over a certain period of time, or set to expire in a designated number of days and the velocity it's being dispensed.

ACCOUNT: WG INC JEFF FOREMAN

Alert Name
Low Inventory

SELECT ALL CRITICAL LEVEL LOW LEVEL

OUT OF SERVICE FAILED TRANSACTION DOOR OPEN

NETWORK ERROR NO PULSE IN TEMPERATURE

PRODUCT EXP IN 3 DAYS

User Alert Level List

All Global Local

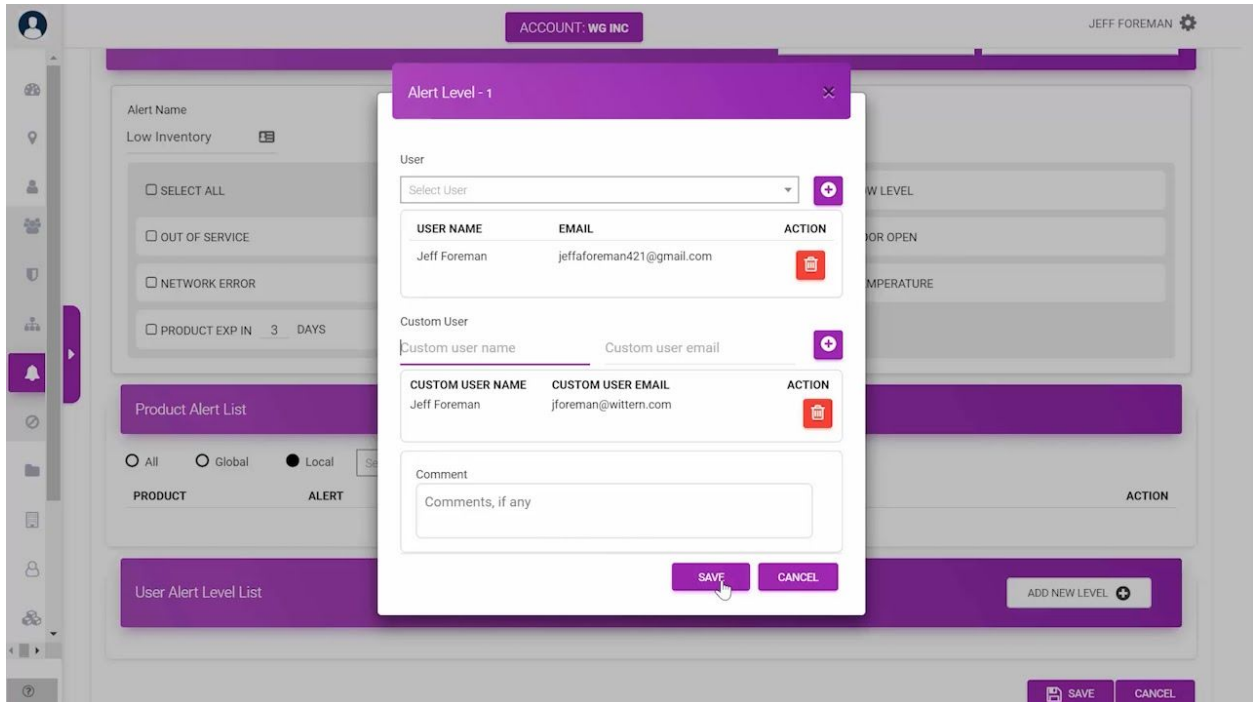
Select Product

ADD TO LIST

| PRODUCT | ALERT | ACTION |
|---------|-------|-----------------|
| | | ADD NEW LEVEL + |

SAVE CANCEL

1. Here you can ADD A NEW LEVEL.



2. Adding a new level includes adding a user who will be alerted and their email address.
 3. You can add users already registered or a custom user.
 4. Click the plus button on the right to add the user and the red trash can button to delete.
 5. This is Alert Level 1. Select save when complete.
- You can add another level to provide further oversight and accountability for employees.
1. Here we will create Alert Level 2.

The screenshot displays a configuration window for alerts. It includes a 'User' section with a 'Select User' dropdown and a '+' button. Below is a table of 'Custom User' entries with columns for 'CUSTOM USER NAME', 'CUSTOM USER EMAIL', and 'ACTION'. The 'Alert Interval' section features a 'Schedule' dropdown set to 'after Alert - 1', a 'Comment' field, and a 'Comments' dropdown menu currently open, showing options: 15 Mintues, 30 Mintues, 45 Mintues, 1 Hour, and 2 Hours. The '15 Mintues' option is selected. At the bottom are 'SAVE' and 'CANCEL' buttons.

2. These alerts will occur if a Level 1 alert is not taken care of within a certain amount of time.
3. Add User Name and Email.
4. Then the time frame after the Level 1 alert has been active. The time frame allows the Level 1 employee to address the issue before it reaches the Level 2 employee.
5. If the Level 1 employee remedies the Alerted issue within the time frame selected here, the Level 2 employee will not receive the alert because the alerted issue has been properly resolved. Here Level 2 will be alerted an hour after Level 1 has been alerted, only if the alerted issue is not addressed within the hour time frame by the Level 1 employee.

ACCOUNT: WG INC JEFF FOREMAN

ADD ALERT

Alerts Search All Locations All Machines

All User Custom User

| ALERT NAME | USER NAME | EMAIL | ALERT ESCALATION | DURATION | ACTIONS |
|---------------|---------------|---------------------------|------------------|----------|----------------------------|
| Low Inventory | Jeff Foreman | jeffaforeman421@gmail.com | Level 1 | 00:00 | [Edit] [Delete] [Dropdown] |
| Low Inventory | Jeff Foreman | jforeman@witern.com | Level 1 | 00:00 | [Edit] [Delete] [Dropdown] |
| Low Inventory | John Van Horn | jvanhorn@witern.com | Level 2 | 01:00 | [Edit] [Delete] [Dropdown] |

https://iqtechportal.com/Alerts/Index/b62d0ccc-4fb9-4aec-8079-08d84eaab...

Click this edit button to edit that employee's alerts.

ACCOUNT: WG INC JEFF FOREMAN

BACK

Edit Alert All Locations All Machines

Alert Name
Low Inventory

SELECT ALL
 CRITICAL LEVEL
 LOW LEVEL

OUT OF SERVICE
 FAILED TRANSACTION
 DOOR OPEN

NETWORK ERROR
 NO PULSE IN
 TEMPERATURE

PRODUCT EXP IN 3 DAYS

LEVEL - 2 jvanhorn@witern.com

Comment
Comments, if any

Duration
1 Hour

Here you can see the different alerts and what employees they are tied to.

The drop down menu also shows what the employee is being alerted on.

LOT TRACKING

ACCOUNT: WG INC | JEFF FOREMAN

HEALTH | TOTAL MACHINES: 4 | Percentage of machines online: 75%

1 MACHINES OFFLINE | 3 MACHINES ONLINE | 2 NOT RECENTLY DISPENSED | 2 RECENTLY DISPENSED | 57 ACTIVE ALERTS

PRODUCT OVERVIEW

- Active Products: 44
- Units in locker: 769818
- Top Today: Alan Hopkins Scanner
- Top This Month: Alan Hopkins Scanner

TOP 02 | Locations | Revenue

| Location Name | Total Quantity | Total Price |
|----------------|----------------|-------------|
| Tech Alcove | 164 | 2296.00 |
| Central Stores | 8 | 8.00 |

URL: <https://iqtechportal.com/SupplyRoom>

- Lot numbers for expiration date products and non expiration date products can be tracked via our Supply Room.
- Receiving a product into the Supply Room you can include the Lot Number and the Expiration date, if applicable.

ACCOUNT: WG INC | JEFF FOREMAN

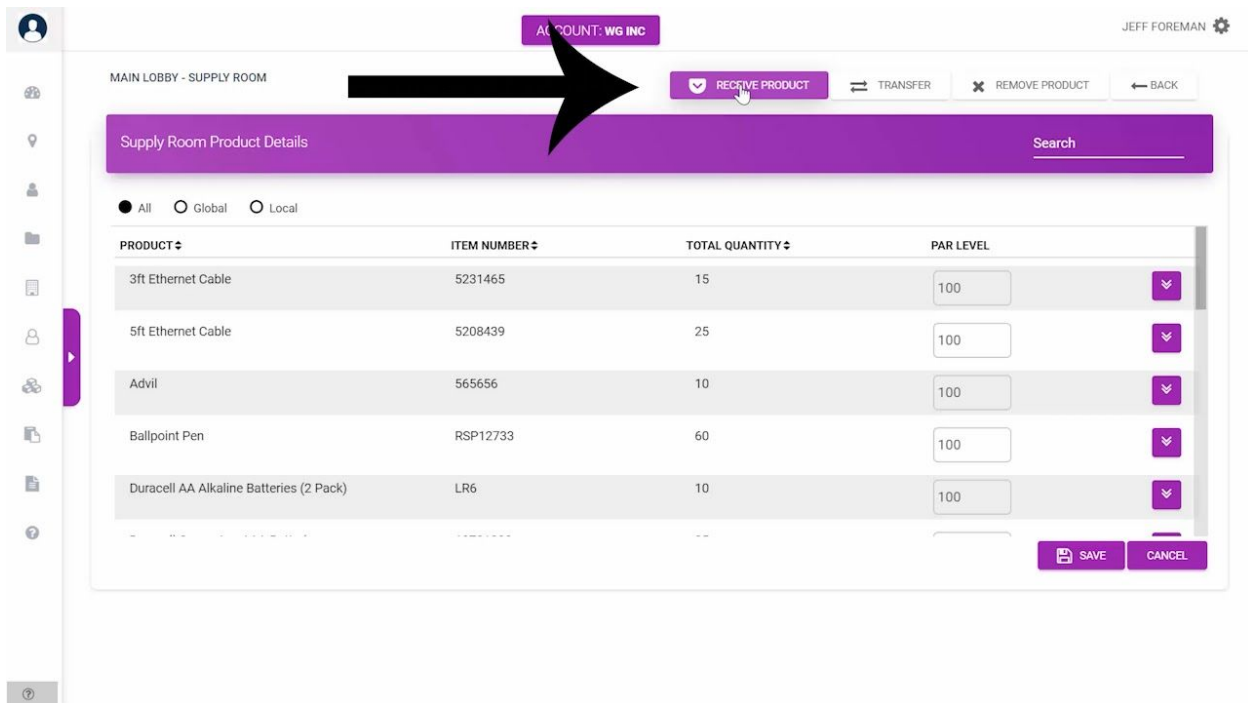
ADD SUPPLY ROOM

Supply Room | Search

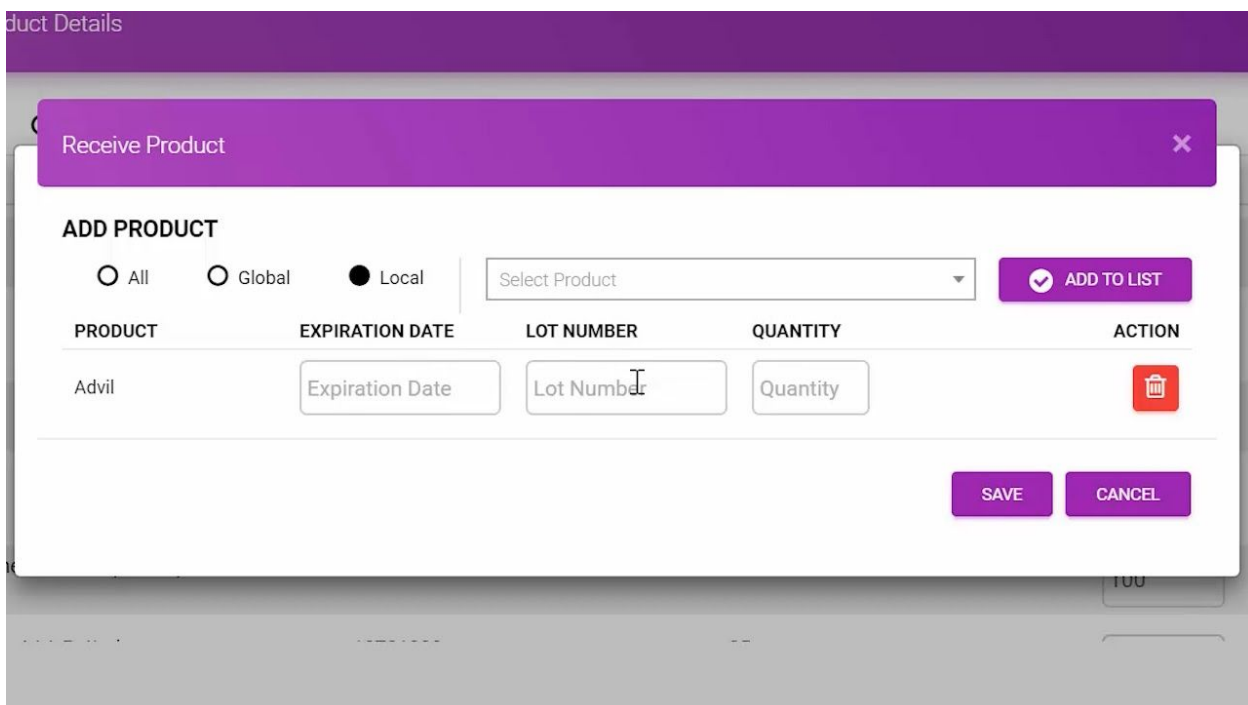
| SUPPLY ROOM NAME ~ | LOCATION ~ | VIEW | RECEIVE | TRANSFER | HISTORY | REMOVE | ACTIONS |
|---------------------------|-------------|------|---------|----------|---------|--------|---------|
| Main Lobby - Supply Room | Main Lobby | | | | | | |
| Tech Alcove - Supply Room | Tech Alcove | | | | | | |

URL: iqtechportal.com/SupplyRoom/.../2bf7670d-ee28-41af-f9e1-08d80bbbf7b7...

1. View the Supply Room here.



2. Click up here to receive a product into the Supply Room.



3. Select your product and ADD TO LIST.

4. Add expiration date, lot number and quantity here.

5. Be sure to save.

ACCOUNT: WG INC JEFF FOREMAN ⚙️

MAIN LOBBY - SUPPLY ROOM RECEIVE PRODUCT TRANSFER REMOVE PRODUCT BACK

Supply Room Product Details Search

All Global Local

| PRODUCT | ITEM NUMBER | TOTAL QUANTITY | PAR LEVEL | | | | | | | | | |
|---|-------------|-----------------|-----------|------------|----------|-----------------|--------|----|------------|--------|----|------------|
| 3ft Ethernet Cable | 5231465 | 15 | 100 | | | | | | | | | |
| 5ft Ethernet Cable | 5208439 | 25 | 100 | | | | | | | | | |
| Advil | 565656 | 20 | 100 | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>LOT NUMBER</th> <th>QUANTITY</th> <th>EXPIRATION DATE</th> </tr> </thead> <tbody> <tr> <td>556655</td> <td>10</td> <td>09/30/2020</td> </tr> <tr> <td>565656</td> <td>10</td> <td>11/01/2020</td> </tr> </tbody> </table> | | | | LOT NUMBER | QUANTITY | EXPIRATION DATE | 556655 | 10 | 09/30/2020 | 565656 | 10 | 11/01/2020 |
| LOT NUMBER | QUANTITY | EXPIRATION DATE | | | | | | | | | | |
| 556655 | 10 | 09/30/2020 | | | | | | | | | | |
| 565656 | 10 | 11/01/2020 | | | | | | | | | | |
| Ballpoint Pen | DD12722 | 60 | | | | | | | | | | |

SAVE **CANCEL**

- Click the product's drop down to see each Lot Number, Quantity, and expiration date for the product.
- Now when you fill a machine with product from the supply room, you can choose the Lot Number that is closest to expiring.
- When you create a Pick List for restocking a machine the quantity of product in the Supply Room will decrease, corresponding with the amount in the Pick List that will be added to the machine. You will be able to see the amount decrease in the supply room and increase in the specific machine.

54TH FLOOR - SUPPLIES SERIAL NO : WTN

| PRODUCT | VALIDATION | CRITICAL LEVEL | LOW LEVEL | PAR LEVEL | M/ |
|--|------------|----------------|-----------|-----------|----|
| <input checked="" type="checkbox"/> 3FT ETHERNET CABLE | | 0 | 0 | 0 | C |
| <input checked="" type="checkbox"/> 5FT ETHERNET CABLE | | 0 | 0 | 0 | C |
| <input checked="" type="checkbox"/> ALAN HOPKINS SCANNER | | 0 | 0 | 0 | C |
| <input checked="" type="checkbox"/> ADVIL | | 0 | 0 | 15 | C |
| <input checked="" type="checkbox"/> BRADLEY WEIR SCANNER | | 0 | 0 | 0 | C |
| <input checked="" type="checkbox"/> CAROL ARCHER SCANNER | | 0 | 0 | 0 | C |

Generate Pick List here.

ACCOUNT: WG INC JEFF FOREMAN

PICK LIST HISTORY

Pick List

ACCOUNT
 LOCATION
 MACHINE

FILL LEVEL
 Par Level
 Max Level

Select Supply Room:

Main Lobby - Supply Room
Tech Alcove - Supply Room

Select Location:

GENERATE PICK LIST

You can generate a Pick List based on account, machine, or location. Choose Par Level or Max Level.

ACCOUNT: WG INC JEFF FOREMAN ⚙️

PICK LIST HISTORY

Pick List

ACCOUNT
 LOCATION
 MACHINE

FILL LEVEL: Par Level
 Max Level

Main Lobby - Supply Room x ▾
 Tech Alcove x ▾
 GENERATE PICK LIST

54th Floor - Supplies x ▾

GENERATED NO: 1598988008

| DATE | TIME | SERIAL NO. | MACHINE NAME | USER | ACTIONS |
|------------|----------|----------------------|-----------------------|--------------|---|
| 09/01/2020 | 14:20:08 | WTN42246641120163004 | 54th Floor - Supplies | Jeff Foreman | <input checked="" type="checkbox"/> ACCEPT <input checked="" type="checkbox"/> VIEW <input type="checkbox"/> DELETE |

✓ Success
Pick list Generated!

iqtechportal.com/Picklist/ViewPicklist/ad5e7e44-8757-4331-8e3e-735adfa04...

Select Supply Room, Location and Machine. Click Generate Pick List. Then View.

ACCOUNT: WG INC JEFF FOREMAN ⚙️

EXPORT PRINT ← BACK

Pick List Details

54TH FLOOR - SUPPLIES WG Inc 09012020192008297147

Supply Room: Main Lobby - Supply Room

Created By: Jeff Foreman

Created Date Time: 09/01/2020 14:20

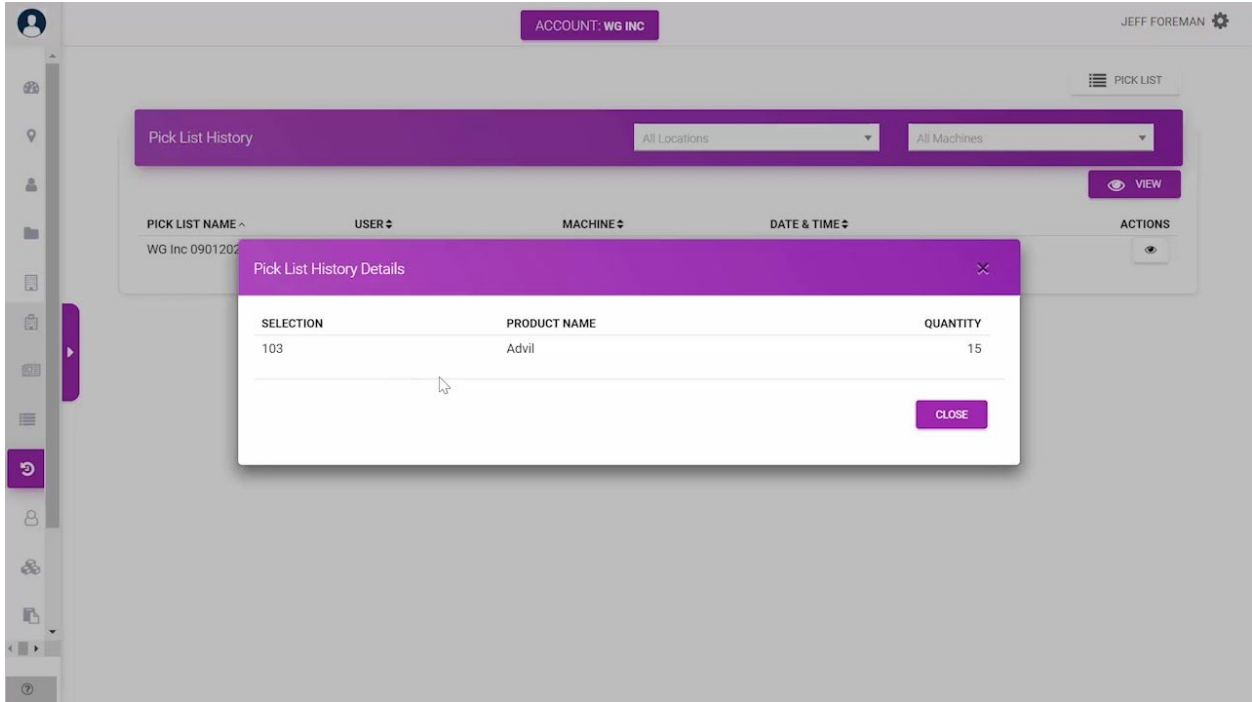
Pick List Level: Par Level

| SELECTION | PRODUCT | ITEM NO | QUANTITY |
|-----------|---------|---------|----------|
| 103 | Advil | 565656 | 15 |

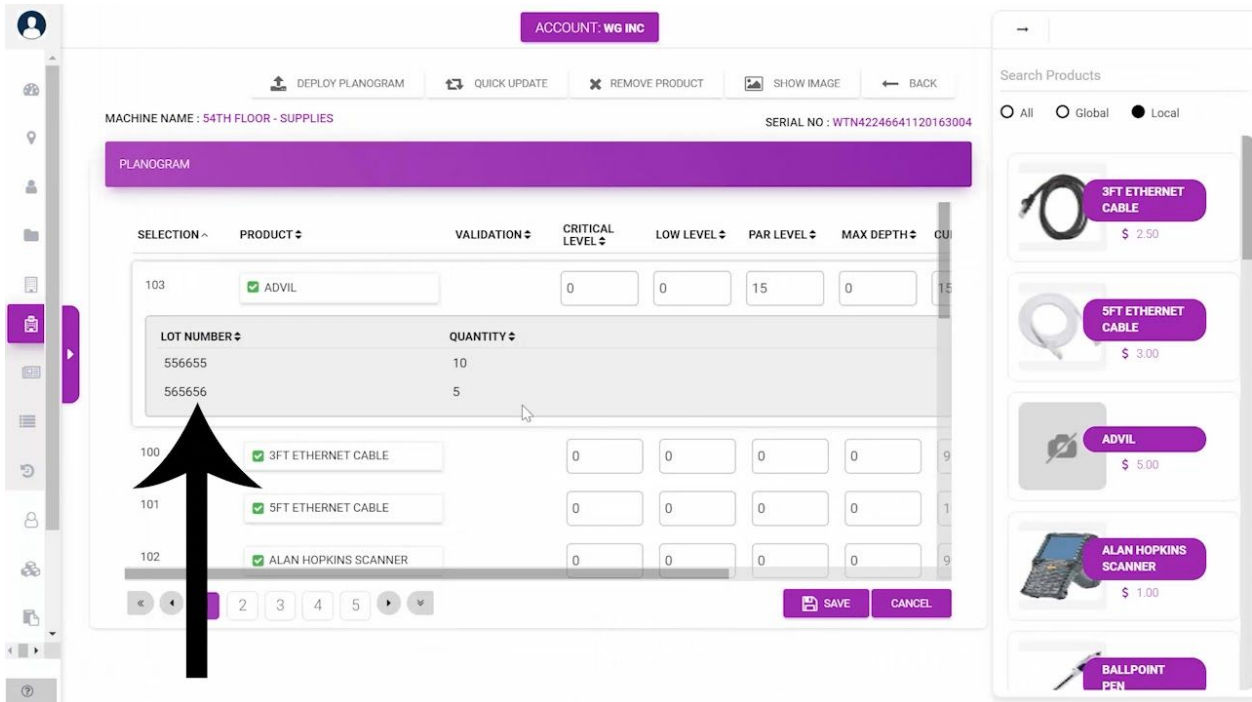
ACCEPT
 DELETE

iqtechportal.com/Picklist/ViewPicklist/ad5e7e44-8757-4331-8e3e-735adfa04...

The 15 new Advil for the machine is seen here. Clicking accept will move this quantity of product to the machine selected.



This will also appear in your Pick List history seen here. Showing what has been added where and when.



You can look at the machine and see the Product Lot number, quantity in the machine and expiration date.

ACCOUNT: WG INC JEFF FOREMAN

MAIN LOBBY - SUPPLY ROOM

RECEIVE PRODUCT TRANSFER REMOVE PRODUCT BACK

Supply Room Product Details

Search

All Global Local

| PRODUCT | ITEM NUMBER | TOTAL QUANTITY | PAR LEVEL |
|---|-------------|----------------|-----------|
| 3ft Ethernet Cable | 5231465 | 15 | 100 |
| 5ft Ethernet Cable | 5208439 | 25 | 100 |
| Advil | 5208439 | 5 | 100 |
| Ballpoint Pen | RSP12733 | 60 | 100 |
| Duracell AA Alkaline Batteries (2 Pack) | LR6 | 10 | 100 |

New Supply Room Quantity

SAVE CANCEL

Also, when you view the Supply Room, the new quantity will appear after moving product to the machine.

As employees dispense from the machine's 103 selection, the product that will expire earliest will be dispensed first.

USER LIMITS

The screenshot shows a dashboard with a sidebar on the left containing menu items: Dashboard, Locations, User, Product, Machines, Employee, Manage Employees, **Departments** (highlighted in red), Employee Badge, Manage Shift, Supply Room, and Purchase Order. The main content area displays 'MACHINE HEALTH' with 'TOTAL MACHINES 5' and a 'Percentage of machines online' progress bar. Below this, there are four categories: 'MACHINES OFFLINE' (2), 'MACHINES ONLINE' (3), 'NOT RECENTLY DISPENSED' (4), and 'RECENTLY DISPENSED' (1). A line graph shows machine status over a 24-hour period. To the right, there are sections for 'PRODUCT OVERVIEW' and 'TOP'.

User Limits are tied to departments, located under the Employee tab.

The screenshot shows the 'Departments' table in a system. At the top, it says 'ACCOUNT: WG INC' and 'JEFF FOREMAN'. There are buttons for 'ADD NEW' and 'ASSIGN EMPLOYEE'. The table has columns: DEPARTMENT NAME, DEPARTMENT NUMBER, PRODUCT RESTRICTIONS, USER LIMIT, and ACTIONS. A 'SELECT ALL' checkbox is highlighted with a red box, and a black arrow points to it from above.

| DEPARTMENT NAME | DEPARTMENT NUMBER | PRODUCT RESTRICTIONS | USER LIMIT | <input type="checkbox"/> SELECT ALL | ACTIONS |
|----------------------|-------------------|----------------------|------------|-------------------------------------|---------|
| Administration | 31 | | | <input type="checkbox"/> | |
| Alan Hopkins | 15 | | | <input type="checkbox"/> | |
| Andrea Witherspoon | 33 | | | <input type="checkbox"/> | |
| Bradley Weir | 11 | | | <input type="checkbox"/> | |
| Carol Archer | 17 | | | <input type="checkbox"/> | |
| Chad Sarver Jagerson | 32 | | | <input type="checkbox"/> | |
| CharleyAnn Thompson | 35 | | | <input type="checkbox"/> | |
| Chris Moraetes | 27 | | | <input type="checkbox"/> | |
| Christopher White | 16 | | | <input type="checkbox"/> | |
| Cody Sanders | 21 | | | <input type="checkbox"/> | |

In this section you can check off which Department you want to set up User Limits or Product Restrictions, in case you want to do multiple departments at one time.

| NAME | DEPARTMENT NUMBER | PRODUCT RESTRICTIONS | USER LIMIT | <input type="checkbox"/> SELECT ALL |
|---------|-------------------|----------------------|------------|-------------------------------------|
| | 31 | | | <input type="checkbox"/> |
| | 15 | | | <input type="checkbox"/> |
| spoon | 33 | | | <input type="checkbox"/> |
| | 11 | | | <input type="checkbox"/> |
| | 17 | | | <input type="checkbox"/> |
| agerson | 32 | | | <input type="checkbox"/> |
| ompson | 35 | | | <input type="checkbox"/> |
| s | 27 | | | <input type="checkbox"/> |
| hite | 16 | | | <input type="checkbox"/> |
| | 21 | | | <input type="checkbox"/> |

1. To set up a User Limit for a single department, click the icon here for the department you want to edit.

ACCOUNT: WG INC JEFF FOREMAN

[ADD NEW](#) [BACK](#)

User Limit Administration

Enter Employee PIN at Machine

Number of items employees can select during each vend session 10

[UPDATE](#)

NO DATA FOUND

2. The first User Limit available is Enter Employee PIN at Machine.

3. The second User Limit is Limiting the Number of Items Employees Can Select During Each Vend Session. You can customize this number from anywhere between 1 & 20.
4. When an employee is using a machine they are credited this number of items during each vend session.
5. Be sure to click the Update button after making any changes. This change will affect the department shown here.

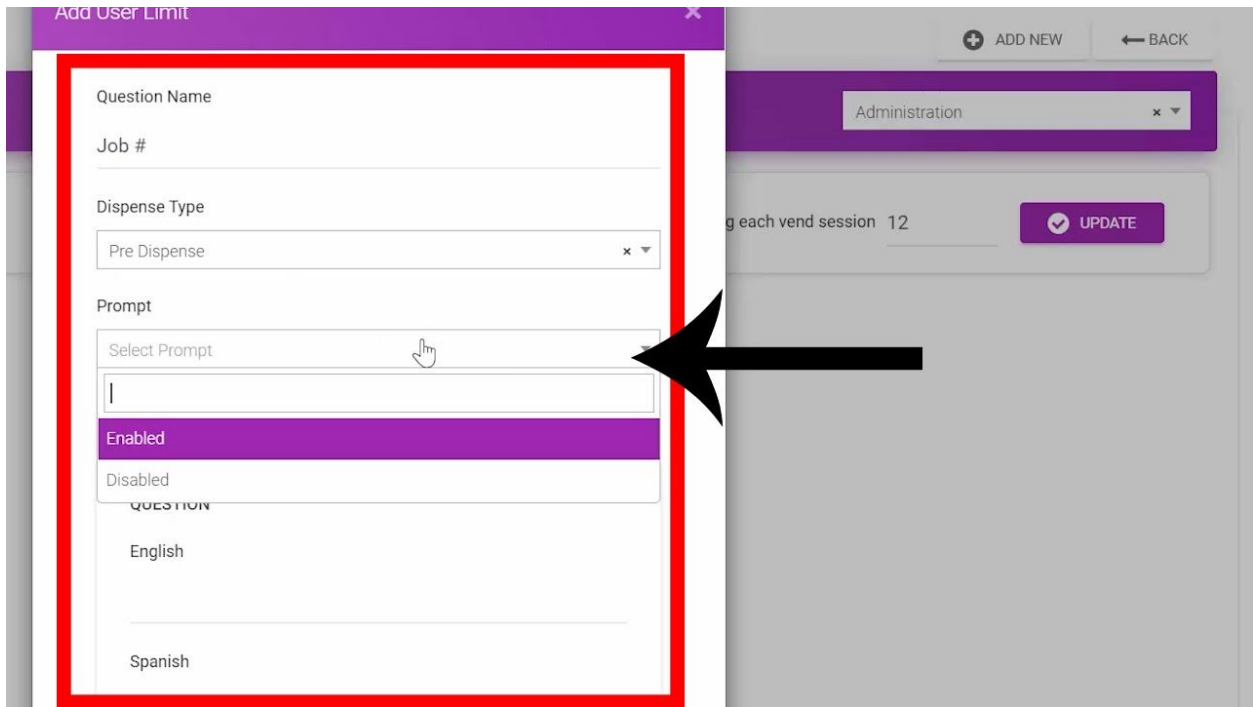
Administration

Number of items employees can select during each vend session 12

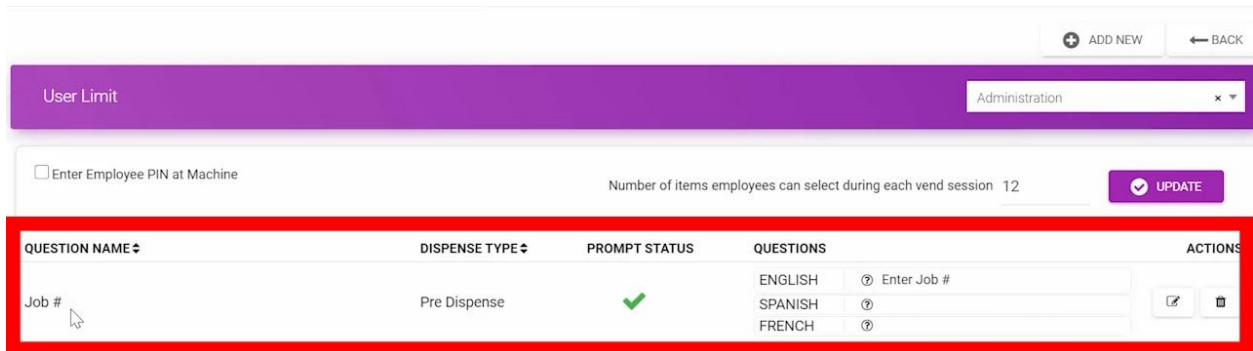
UPDATE

NO DATA FOUND

1. You can select a different department to change from this drop down as well.
2. To create a new User Limit, Select ADD NEW.



3. Type in the Question Name, Dispense Type and Prompt.
 - a. If you choose a Predefined answer, users can ONLY input answers stated here.
4. When complete select ADD User Limit.



5. This new User Limit will now appear on the department's User Limits page.

6. You can edit or delete the User Limit on the right.

The screenshot shows a web application interface for adding a user limit. A modal window titled "Add User Limit" is open, with a red border around its content. The form includes the following fields and options:

- Question Name:** A text input field.
- Truck #:** A text input field.
- Dispense Type:** A dropdown menu with "Post Dispense" selected.
- Prompt:** A dropdown menu with "Enabled" selected.
- Answer Type:** Two radio buttons: "Any Answer" (selected) and "Predefined Answer". A black arrow points to the "Any Answer" radio button.
- QUESTION:** A section with three text input fields for "English", "Spanish", and "French". The "English" field contains the text "Truck".

The background interface shows a sidebar with "User Limit" and a main area with "Administration" and "UPDATE" buttons.

1. We will now set up a User Limit question to be asked AFTER the dispensing of the product.
2. For Dispense Type select POST Dispense.
 - a. In this case ANY Answer is accepted.
 - b. The Administration Department will have a credit of 12 items per vend session. They must input a predetermined acceptable Job # before dispensing and any truck # after dispensing.
3. Delete unwanted User Limits

PRODUCT RESTRICTIONS





















The dashboard displays machine health metrics: TOTAL MACHINES 5, with a percentage of machines online bar chart. It also shows counts for MACHINES OFFLINE (2), MACHINES ONLINE (3), NOT RECENTLY DISPENSED (4), and RECENTLY DISPENSED. A line graph shows machine activity over 24 hours. The PRODUCT OVERVIEW section lists: Active Products (47), Units in locker (799607), Top Today (Tressie Cromer Scanner), and Top This Month (Alan Hopkins Scanner). The left sidebar menu includes: Locations, User, Product, Machines, Employee, Manage Employees, **Departments** (highlighted), Employee Badge, Manage Shift, and Supply Room.

Product Restrictions are tied to each department and can be found on the menu here.

The Departments page features a table with the following columns: DEPARTMENT NAME, DEPARTMENT NUMBER, PRODUCT RESTRICTIONS, USER LIMIT, and ACTION. A red box highlights the 'SELECT ALL' checkbox column. A black arrow points from the 'Departments' menu item in the previous screenshot to this table.

| DEPARTMENT NAME | DEPARTMENT NUMBER | PRODUCT RESTRICTIONS | USER LIMIT | <input type="checkbox"/> SELECT ALL | ACTION |
|----------------------|-------------------|----------------------|------------|-------------------------------------|--------|
| Administration | 31 | | | <input type="checkbox"/> | |
| Alan Hopkins | 15 | | | <input type="checkbox"/> | |
| Andrea Witherspoon | 33 | | | <input type="checkbox"/> | |
| Bradley Weir | 11 | | | <input type="checkbox"/> | |
| Carol Archer | 17 | | | <input type="checkbox"/> | |
| Chad Sarver Jagerson | 32 | | | <input type="checkbox"/> | |
| CharleyAnn Thompson | 35 | | | <input type="checkbox"/> | |
| Chris Moraetes | 27 | | | <input type="checkbox"/> | |
| Christopher White | 16 | | | <input type="checkbox"/> | |
| Cody Sanders | 21 | | | <input type="checkbox"/> | |

Here on the Departments page you can select multiple departments at one time by checking the boxes in this column.

| NAME | DEPARTMENT NUMBER | PRODUCT RESTRICTIONS | USER LIMIT | <input type="checkbox"/> SELECT ALL |
|---------|-------------------|---|---|-------------------------------------|
| 1 | 31 |  |  | <input type="checkbox"/> |
| | 15 |  |  | <input type="checkbox"/> |
| Spoon | 33 |  |  | <input type="checkbox"/> |
| | 11 |  |  | <input type="checkbox"/> |
| | 17 |  |  | <input type="checkbox"/> |
| agerson | 32 |  |  | <input type="checkbox"/> |
| ompson | 35 |  |  | <input type="checkbox"/> |
| s | 27 |  |  | <input type="checkbox"/> |
| hite | 16 |  |  | <input type="checkbox"/> |
| | 21 |  |  | <input type="checkbox"/> |

We will do Product Restrictions for the Administration just group by selecting this icon.

Product Restriction Product Group Restriction
Search

Active Products Current Restrictions

All Global Local

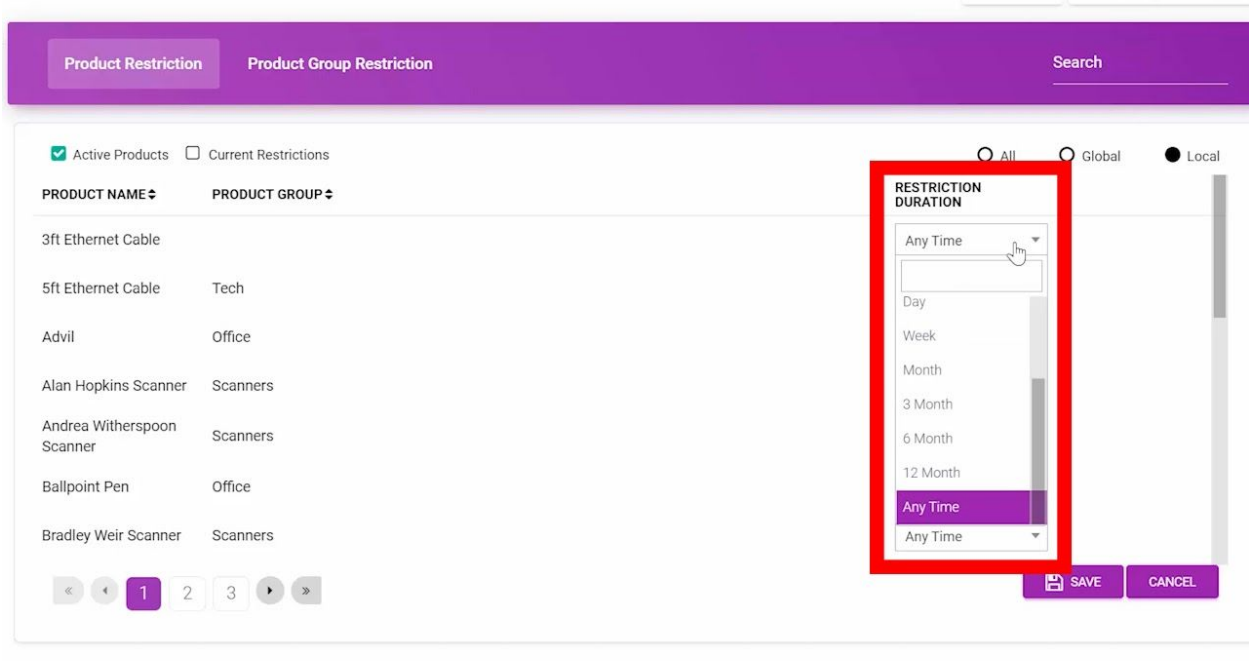
| PRODUCT NAME | PRODUCT GROUP |
|----------------------------|---------------|
| 3ft Ethernet Cable | |
| 5ft Ethernet Cable | Tech |
| Advil | Office |
| Alan Hopkins Scanner | Scanners |
| Andrea Witherspoon Scanner | Scanners |
| Ballpoint Pen | Office |
| Bradley Weir Scanner | Scanners |

RESTRICTION DURATION

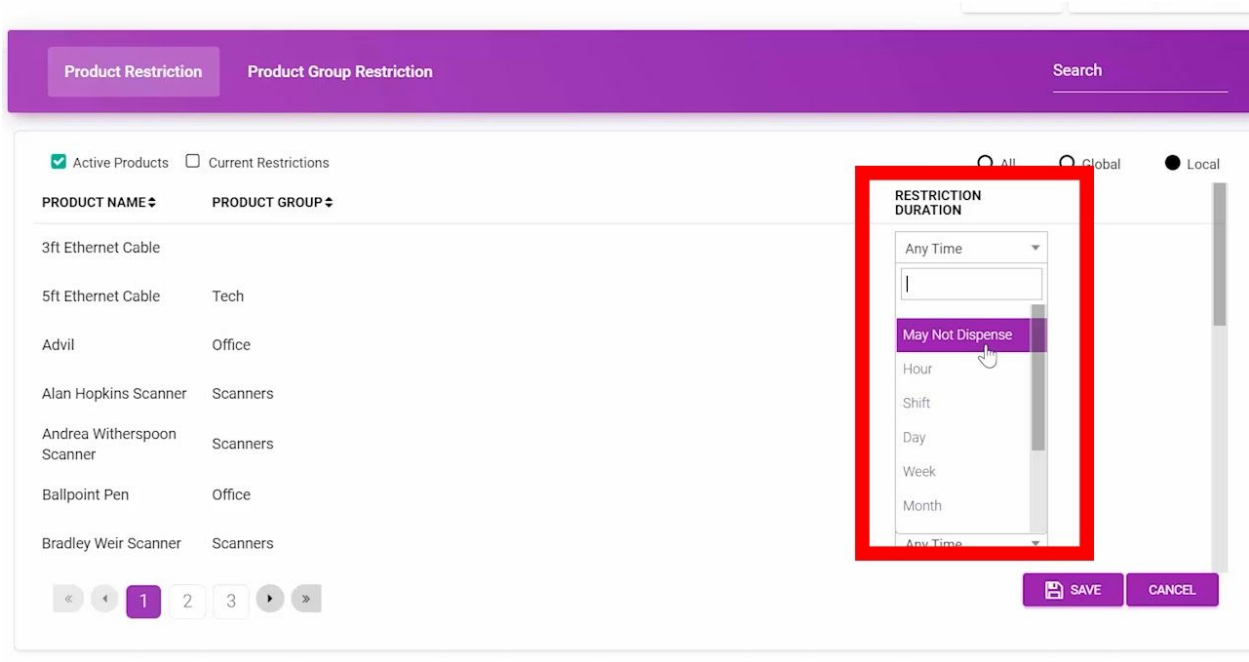
Any Time ▼
 Day
 Week
 Month
 3 Month
 6 Month
 12 Month
Any Time
 Any Time ▼

SAVE
CANCEL

Here it will pull all of your active products. You can select restrictions based on these products.



The Restriction Duration is set in this column, Currently this department can dispense any quantity of these products at any time. Use the drop down menu to adjust duration.



Selecting May Not Dispense will decline employees in this department from accessing the certain product.

Product Restriction Product Group Restriction Search

Products Current Restrictions All C

| IAME | PRODUCT GROUP | RESTRICTION LIMIT | RESTRICTION DURATION |
|------------|---------------|--------------------------------|----------------------|
| t Cable | | Dispense up to 1 or \$ Per | Day |
| t Cable | Tech | | Any Time |
| | Office | | Any Time |
| ns Scanner | Scanners | | Any Time |
| herspoon | Scanners | | Any Time |
| en | Office | | Any Time |
| ir Scanner | Scanners | | Any Time |

The Restriction Limit can be set to a certain quantity over the duration selected.

ACCOUNT: WG INC JEFF FOREMAN

← BACK RESTRICTION EXCEPTION

Product Restriction Product Group Restriction Search

Active Products Current Restrictions All Global Local

| PRODUCT NAME | PRODUCT GROUP | RESTRICTION LIMIT | RESTRICTION DURATION |
|----------------------------|---------------|--------------------------------|----------------------|
| 3ft Ethernet Cable | | Dispense up to 1 or \$ Per | 12 Month |
| 5ft Ethernet Cable | Tech | | Any Time |
| Advil | Office | | Any Time |
| Alan Hopkins Scanner | Scanners | | Any Time |
| Andrea Witherspoon Scanner | Scanners | | Any Time |
| Ballpoint Pen | Office | | Any Time |
| Bradley Weir Scanner | Scanners | | Any Time |

1 2 3

SAVE CANCEL

<https://iqtechportal.com/ProductRestrictions/Index/678dea6b-48a7-4458-72e5-08d837e4e492#>

Make sure to save your settings at the bottom when complete.

The restrictions selected will now be tied to all employees in the corresponding department.

Product Restriction **Product Group Restriction**

Active Products Current Restrictions

| PRODUCT NAME | PRODUCT GROUP | RESTRICTION LIMIT | RESTRICTION DURATION |
|----------------------------|---------------|------------------------|----------------------|
| 3ft Ethernet Cable | | Dispense up to 1 or \$ | Per 12 Month |
| 5ft Ethernet Cable | Tech | | Any Time |
| Advil | Office | | Any Time |
| Alan Hopkins Scanner | Scanners | | Any Time |
| Andrea Witherspoon Scanner | Scanners | | Any Time |
| Ballpoint Pen | Office | | Any Time |
| Bradley Weir Scanner | Scanners | | Any Time |

Here you can create restrictions for Product Groups. A restriction created here will apply to products within the product group.

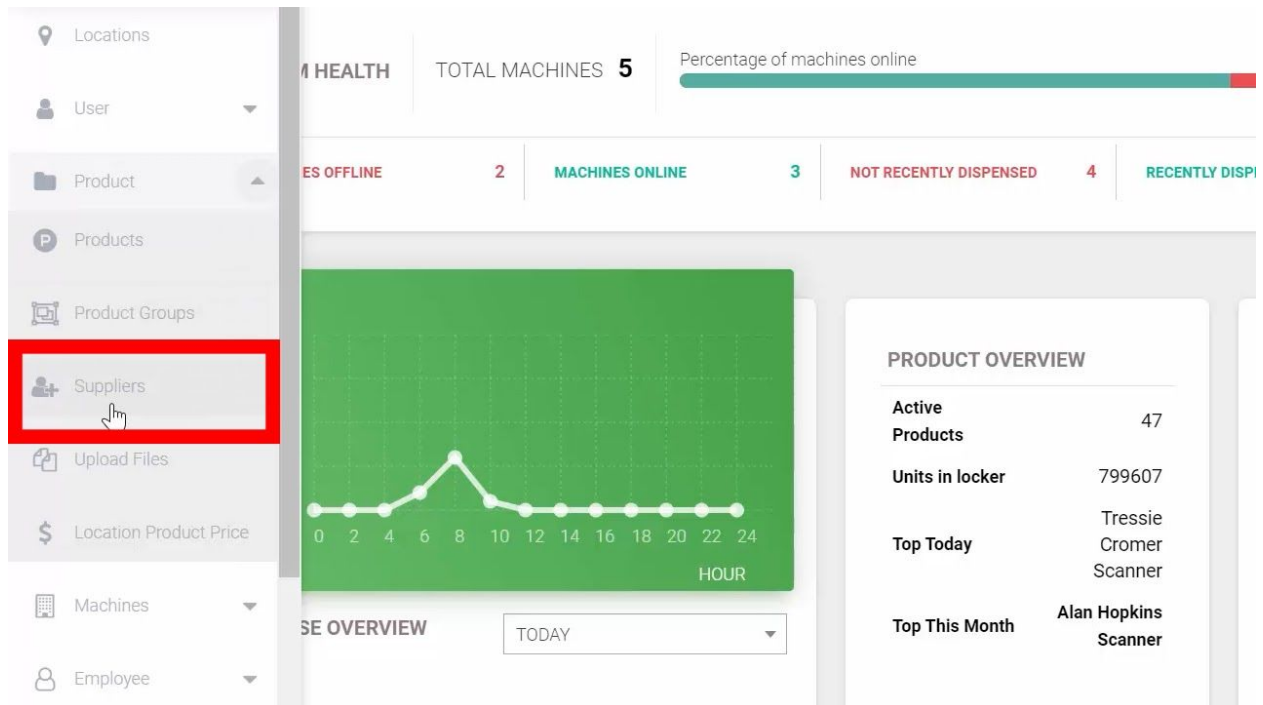
Product Restriction **Product Group Restriction** Search

| PRODUCT GROUP | RESTRICTION LIMIT | RESTRICTION DURATION |
|---------------|------------------------|----------------------|
| Default | | May Not Dispense |
| Office | | May Not Dispense |
| Scanners | | May Not Dispense |
| Tech | Dispense up to 2 or \$ | Per Month |

SAVE

In this example the department can dispense 2 products from the Tech Product Group every month. Save when complete.

SUPPLIERS



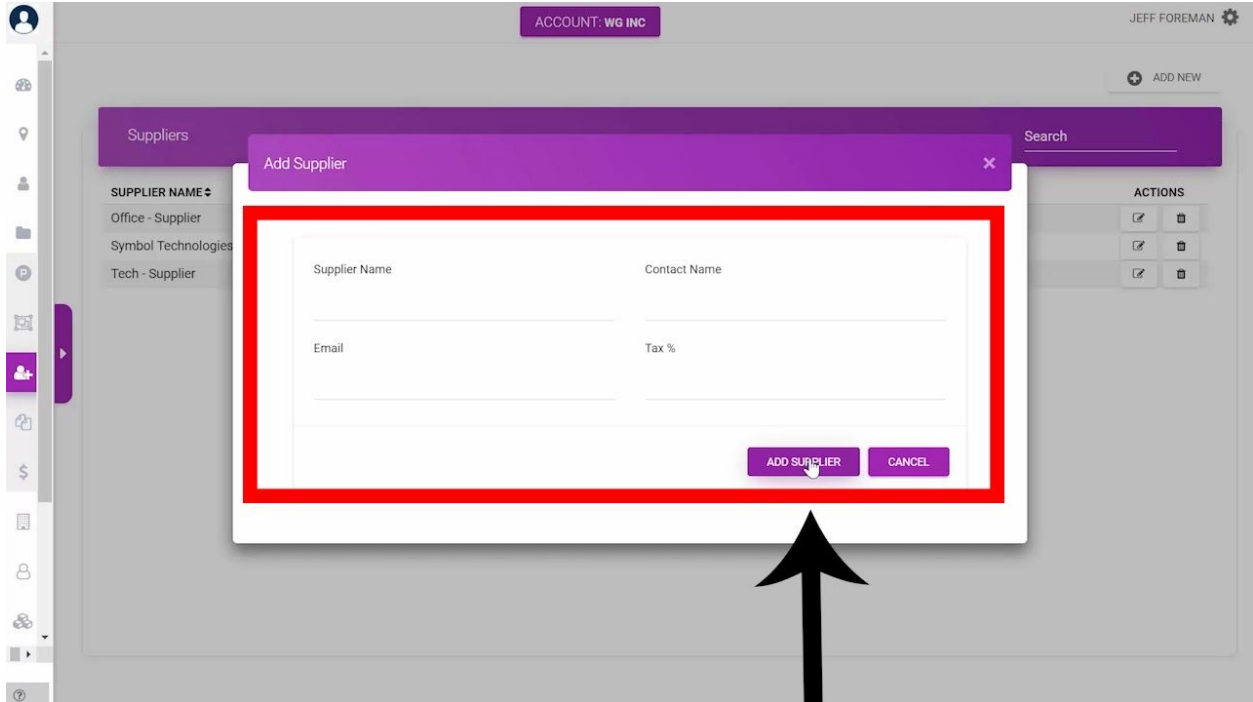
The Suppliers page can be found under Products on the menu tab.

The Suppliers page shows a table with columns: SUPPLIER NAME, CONTACT NAME, EMAIL, TAX %, and ACTIONS. The table contains three entries:

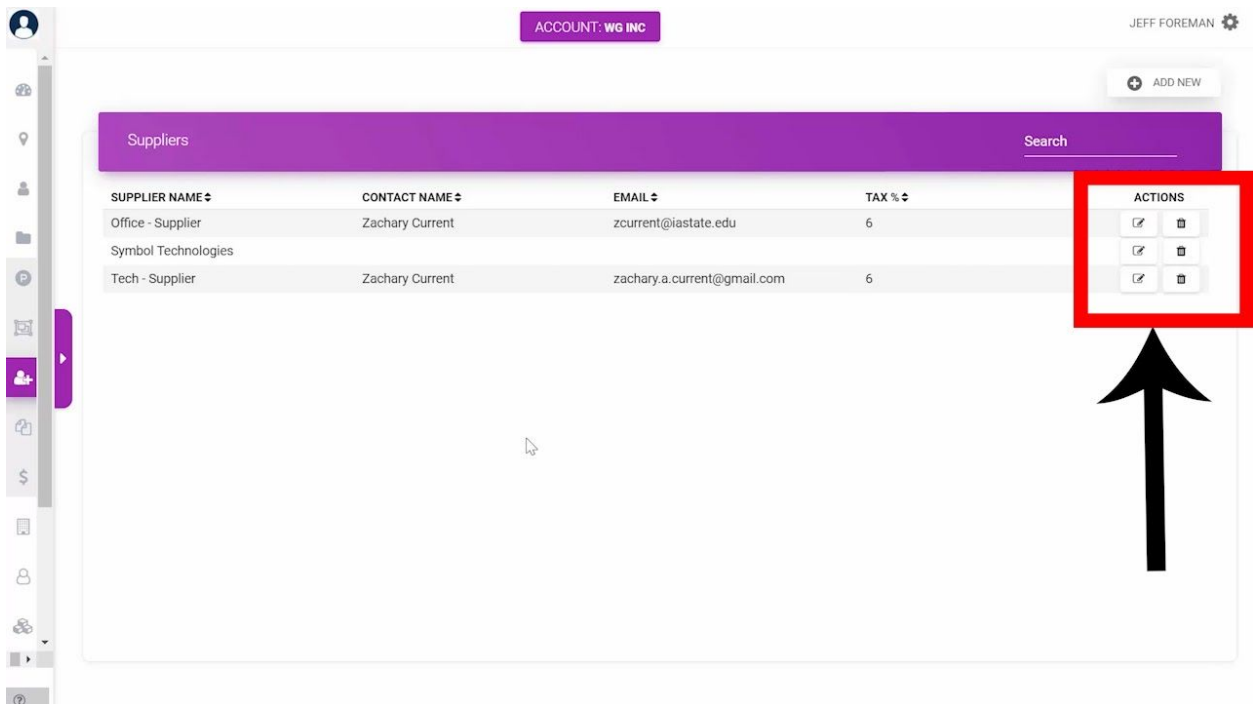
| SUPPLIER NAME | CONTACT NAME | EMAIL | TAX % | ACTIONS |
|---------------------|-----------------|-----------------------------|-------|-----------------|
| Office - Supplier | Zachary Current | zcurrent@iastate.edu | 6 | [Edit] [Delete] |
| Symbol Technologies | | | | [Edit] [Delete] |
| Tech - Supplier | Zachary Current | zachary.a.current@gmail.com | 6 | [Edit] [Delete] |

The 'ADD NEW' button in the top right corner is highlighted with a red box.

1. Click here to add a new supplier.



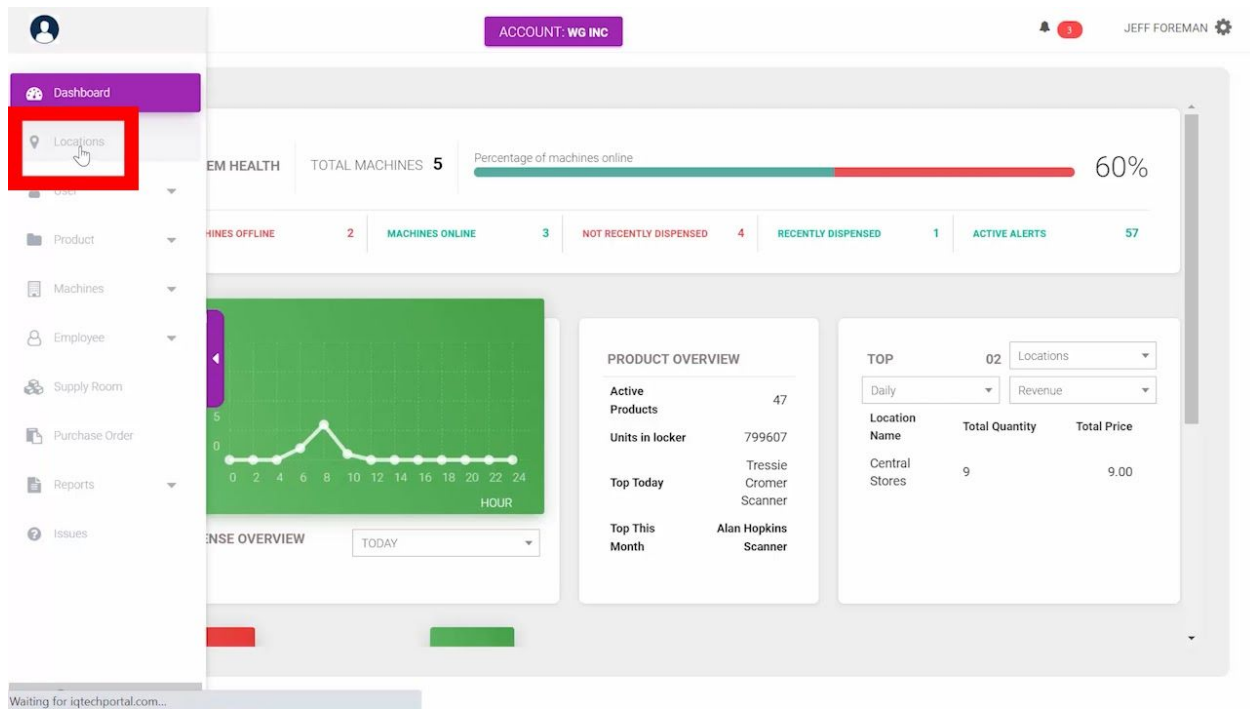
2. Here you can add all the Supplier's information.
3. Hit Add Supplier when complete.



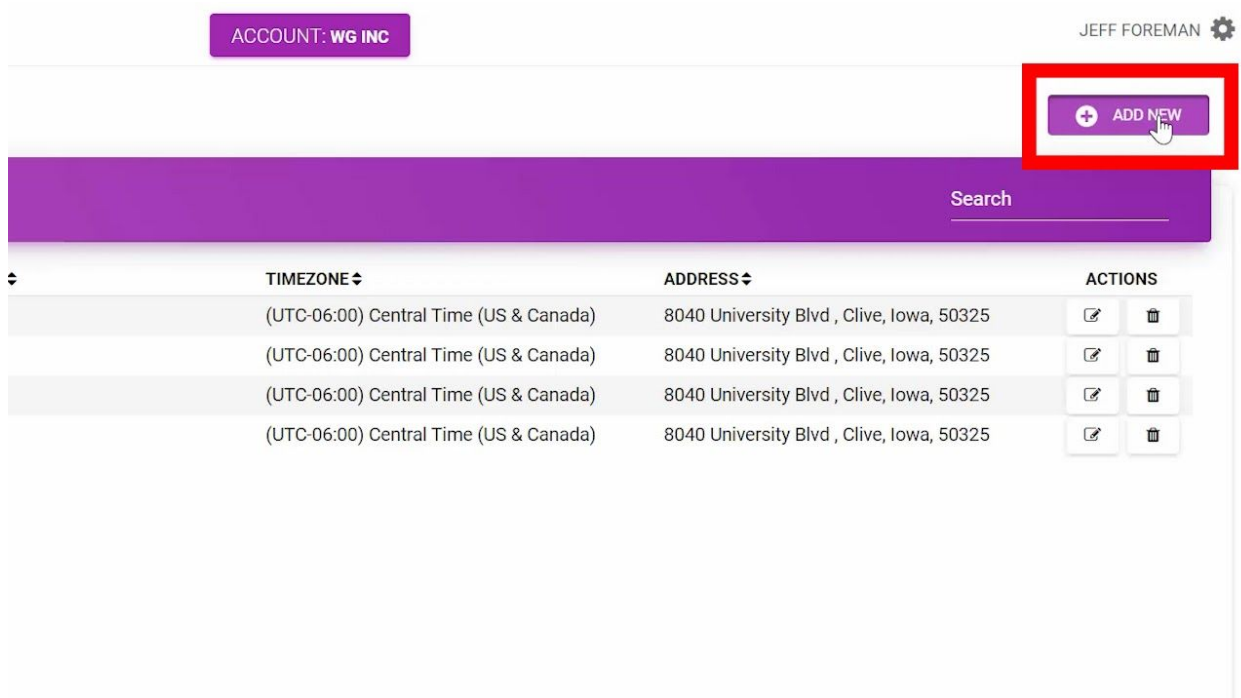
- The Supplier will be added to this page where they can be edited and deleted here on the right.
- Suppliers are tied to products so when you are running a Purchase Order, you can run it based on Suppliers.

- The Purchase Order will pull all the products you need from that supplier to restock your inventory.

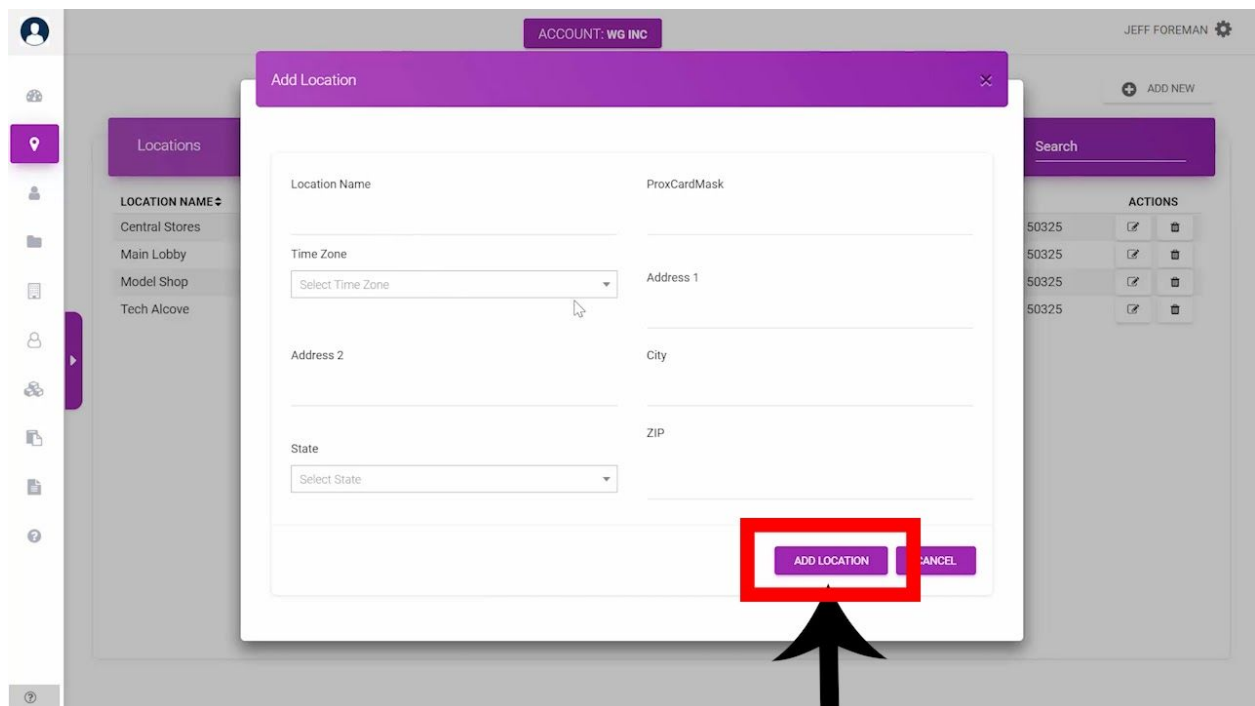
LOCATIONS



1. Find locations at the top bar on the left.
 - a. Locations are where your machines are tied to within the IQ Tech Software.



2. To add a new location to place a machine select ADD NEW.



3. Include necessary location information here.

4. Then click ADD LOCATION.

ACCOUNT: WG INC

JEFF FOREMAN

ADD NEW

Locations

| LOCATION NAME | PROXCARDMASK | TIMEZONE | ADDRESS | ACTIONS |
|----------------|--------------|--|---|-----------------|
| Central Stores | | (UTC-06:00) Central Time (US & Canada) | 8040 University Blvd , Clive, Iowa, 50325 | [Edit] [Delete] |
| Main Lobby | | (UTC-06:00) Central Time (US & Canada) | 8040 University Blvd , Clive, Iowa, 50325 | [Edit] [Delete] |
| Model Shop | | (UTC-06:00) Central Time (US & Canada) | 8040 University Blvd , Clive, Iowa, 50325 | [Edit] [Delete] |
| Tech Alcove | | (UTC-06:00) Central Time (US & Canada) | 8040 University Blvd , Clive, Iowa, 50325 | [Edit] [Delete] |

iqtechportal.com/Location/Index/7d4e6068-66fc-4d41-a9f7-e94c38e4029c

- Locations can be deleted and edited here
- Now, you can place machines in your location
- Locations are helpful for reporting and tracking machines

FAQs

1. How can I generate a purchase order? Can I do that based on the par levels of the supply room or only the machines?

The current system makes the customer input the quantities they want and not autofill. The autofill feature to get their supply room and/or machines back to par level will be implemented shortly.

- The user should select "Purchase Order" on the left side window.
- Select the Supplier to create the purchase order for and select "Create Purchase Order". This will pull all of the products for that supplier into a report.
- Input the Quantities that are desired for each product and select "Ok".
- Adjustments to the quantities can still be made.
- Once completed, select "Confirm Order" and a PDF version of the purchase order will be created. The PDF can be downloaded, or printed and sent to the supplier.

- f. Select Cancel on any of these screens to cancel the Purchase order.

2. How do I schedule a report?

- a. When looking at a report, set the “Location” and “Machine” to what is desired.
 - b. Select the Timeframe on the report and Select “View Report”.
 - c. Once the report is created, edit the tabs that are desired to be viewed.
 - d. Select “Automate” in the upper right-hand corner of the screen.
 - e. Select the frequency of the report, the document type, and the time zone.
 - f. Enter the e-mail address/s and add a comment if desired.
 - g. Select “Save” and the automated report is created.

3. Can I schedule a report to run based on a different 24 hour time frame or by shift?

The system does not currently allow users to automate reports for a specific 24-hour timeframe or by shift. But it does let users select a Frequency for the automation and a date/time for that frequency to start.

- a. On most reports there is a button in the upper right corner of the report allowing users the ability to “Automate” the report
 - b. Select the “Automate” button
 - c. A box will pop up allowing the users to select the automation requirements.
 - d. Set the Frequency, start time for that frequency, Automated Report Name, Document type: PDF or Excel, the time zone, the email

- address' that the automated report should be sent to, and a comments field for information the user wants sent with the report
- e. Select "Save" at the bottom of this box and the automated report will start at the start time specified
 - f. If the user did not want to create this automate report they can select "Cancel" and not automated report will be created

4. Why isn't dual validation working?

5.

There are a few reasons Dual Validation may not be working. Follow the below steps:

- a. Check to see if the internet is live on the machine.
 - i. If it is proceed to step 2
 - ii. If not, get a live internet feed to the machine and test again
- b. Verify the employee's who are attempting to use the machine are both employee's in the software.
 - i. Select the drop down menu for "Employee's"
 - ii. Select the "Manage Employee's" button
 - iii. Search for each employee and verify their information is correct – Badge Number, ID, Department
- c. Check to see that the departments that the employees are a part of are allowed to dispense the product.
 - i. Select the drop down menu for "Employee's"
 - ii. Select "Departments"
 - iii. Select the "Product Restrictions" for each department and verify the product that is attempted to be vended is not set to "May not Dispense"

d. If issues still persist, reach out to iQTech Portals Support team by the Issues tab on the left or e-mail/phone call

5. How do I assign a new employee to a department?

- a. Select the drop down menu for “Employee’s”
- b. Select the “Manage Employee’s” button
- c. In the search bar at the top right search for the employee
- d. Once the employee is found in the row for their information there is an “Actions” button on the right side. Select that button
- e. Select the Drop down for “Departments” and choose the department to put the employee in
- f. Select Save and the employees department has been updated

6. How do I set dispensing restrictions?

- a. Select the drop down menu for “Employee’s”
- b. Select “Departments”
- c. Select the “Product Restrictions” for the department you want to set restrictions for
- d. A list of products will be pulled up
- e. Select the “Restriction Duration” for each product and choose the restriction type
- f. Once all products are set for the department, select “Save” and go back to the departments list to edit other departments restrictions

7. How do I create a picklist and then what?

- a. Verify that there is product in the Supply room that will be used to pull product from
- b. Verify the machine/s that will be stocked have quantities of product in them less than the “Refill to” level
- c. Select the drop down menu for “Machines”
- d. Select “Pick List”
- e. Select the options at the top of the menu for how the picklist should be run:
 - i. Select if the Pick List is for the Entire Account, A specific Location, A specific Machine
 - ii. Select the Fill Level type: Par Level or Max Level, Par level will refill the machine/s to the “Refill To” Level and “Max Level” will refill the machine/s to the “Max Depth” level
 - iii. In the drop down select the “Supply Room” that the products will be pulled from
 - iv. Select other applicable information for the Pick List depending on if “Account, Location, or Machine” was selected
 - v. Select “Generate Pick List”
- f. The Pick List will be created for the machine/s that were selected
- g. Users can View and edit the quantities for the Pick List per machine
- h. Users can then Accept the Pick List
- i. If the Pick List will not be used select the “Delete” actions button for that Pick List

8. How do I remove expired medications from the main count?

Removing Products from the Machine

- a. Select the “Machines” menu on the left window
 - b. Select the “Machine” option
 - c. Select the “Planogram” for the machine you are removing product from
 - d. Select the “Remove Product” button from the options in the top right corner of the screen
 - e. Type in the quantity of products to be removed and the reason why they are being removed
 - f. Once all products that are being removed have been input with quantities and reasons why, select the save button in the bottom right of the screen
 - g. Select “Back” in the upper right of the screen and the Planogram view of this machine will be displayed again
 - h. Edit other machines by taking the same steps above

Removing Products from the Supply room

- a. Select the “Supply Room” Menu on the left window
 - b. Select the “Remove” button in the row for the supply room that is having product removed from
 - c. Type in the quantity of products to be removed and the reason why they are being removed
 - d. Once all products that are being removed have been input with quantities and reasons why, select the save button in the bottom right of the screen
 - e. Select “Back” in the upper right of the screen and the list of supply rooms will be displayed again
 - f. Edit other supply rooms by taking the same steps above

9. How do I put products in groups?

- a. Select the “Product” Menu on the left side window
- b. Select the “Products” button
- c. All products will be displayed, select the actions icon on the right of the screen in the row for the product that will be updated
- d. Select the drop down for “Product Group” and select the group that the product is in

- e. Scroll to the bottom of the page and select “Update Product” in the bottom right corner of the screen
- f. The Products page will be displayed again allowing a different product to be changed
- g. If a new product group is needed select the “Product” menu on the left side window
- h. Select the “Product Groups” button
- i. Select “Add New” in the upper right corner of the screen
- j. Enter the Group name, Default Max and Default Depth

i. Default Max will set all the Max levels for the products to this number

ii. Default Depth will set all the Depth

levels for the products to this number

k. Select “Add Product Group” and the product group is added to the list of Groups

l. Follow the above steps to create additional groups as well as assign products to those groups

10. How do I change a product in the machine and software?

- a. Select the “Machines” menu on the left window
- b. Select the “Machine” option
- c. Select the “Planogram” for the machine you are changing the product on
- d. There are two ways to place a new product in the machine
 - i. Click on the name of the product and a products window will appear, search for the new product and click on it to place it in the selection that was clicked on
 - ii. Or, Search for the new product in the window on the right side of the screen, drag and drop the product into the selection that is being changed
 - e. Once the product has been changed, update the information for when to be alerted and the refill levels
 - f. Select the “Save” button in the bottom right corner of the screen to save this planogram
 - g. Once the product is changed on the software the products within the machine can be changed to the correct product

11. How do I set restrictions on vending amounts per employee?

The current system does not have the ability to do this per specific employee but by specific department. The specific employee restrictions will be updated soon.

A way to set a specific employee to specific restrictions would be to create an additional department and put only that employee in that department and then set the restrictions for that department as explained below:

- a. Select the drop down menu for "Employee's"
 - b. Select "Departments"
 - c. Select the "Product Restrictions" for the department you want to set restrictions for
 - d. A list of products will be pulled up
 - e. Select the "Restriction Duration" for each product and choose the restriction type
 - f. Once all products are set for the department, select "Save" and go back to the departments list to edit other departments restrictions