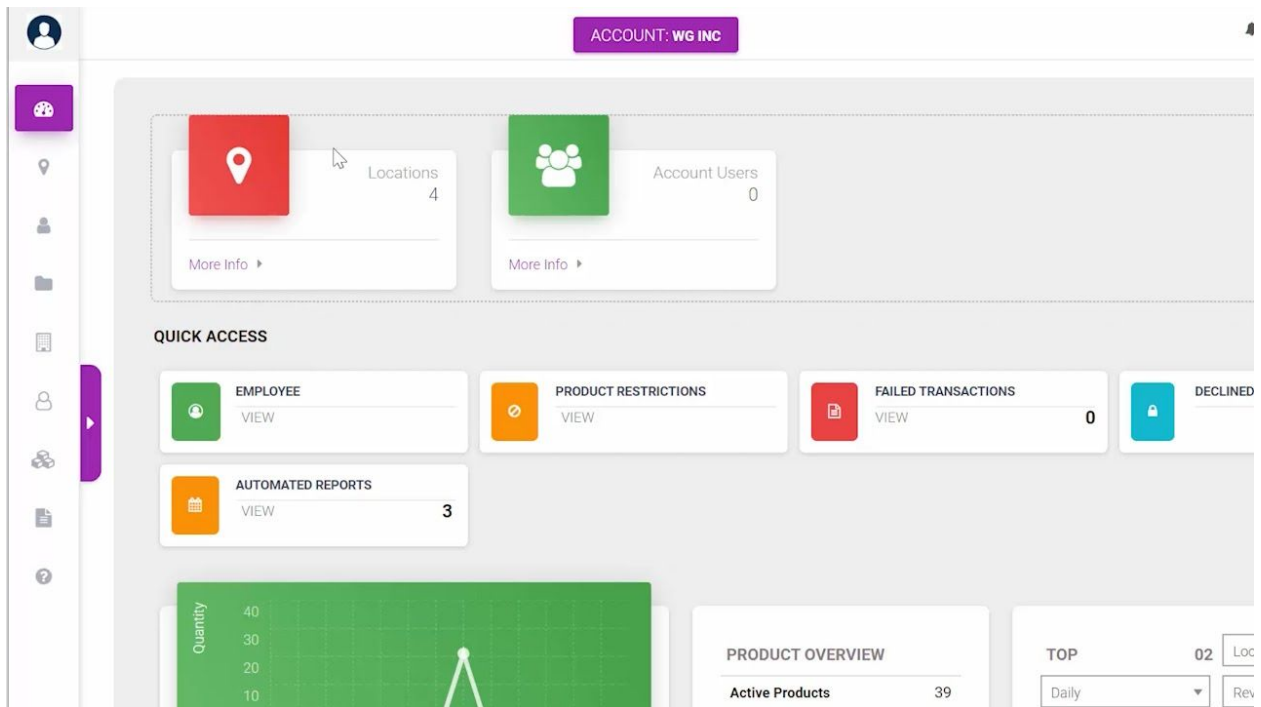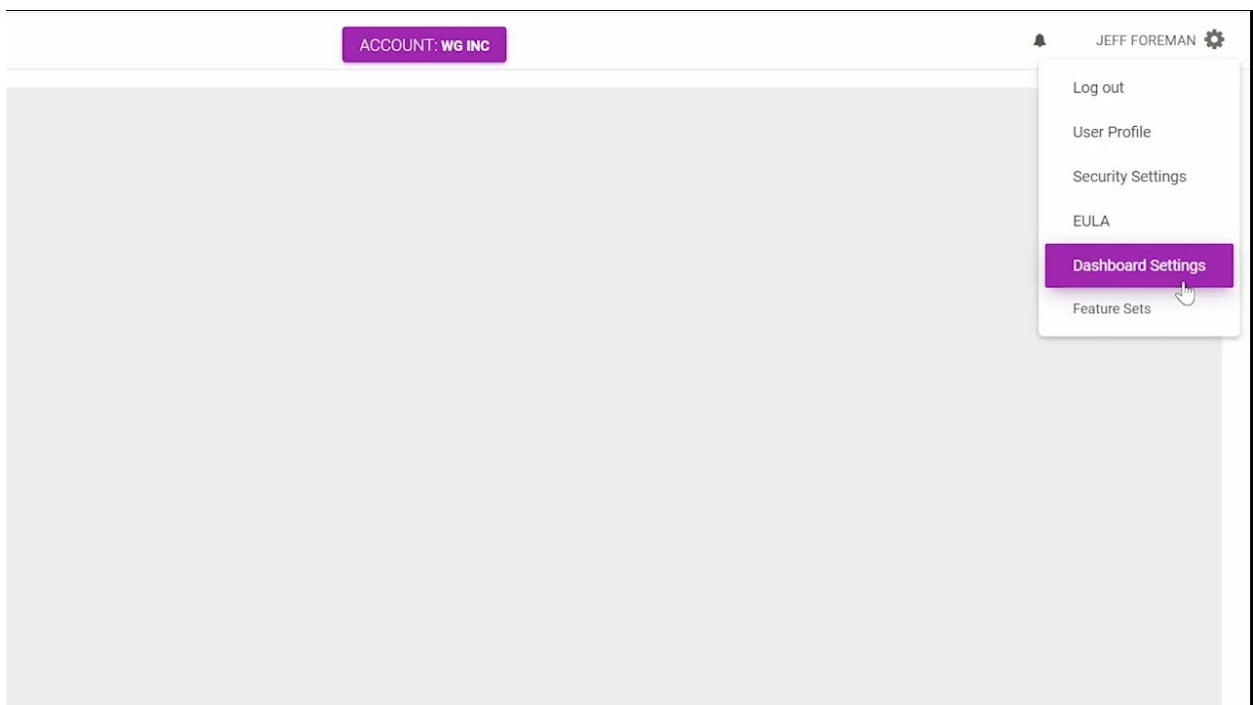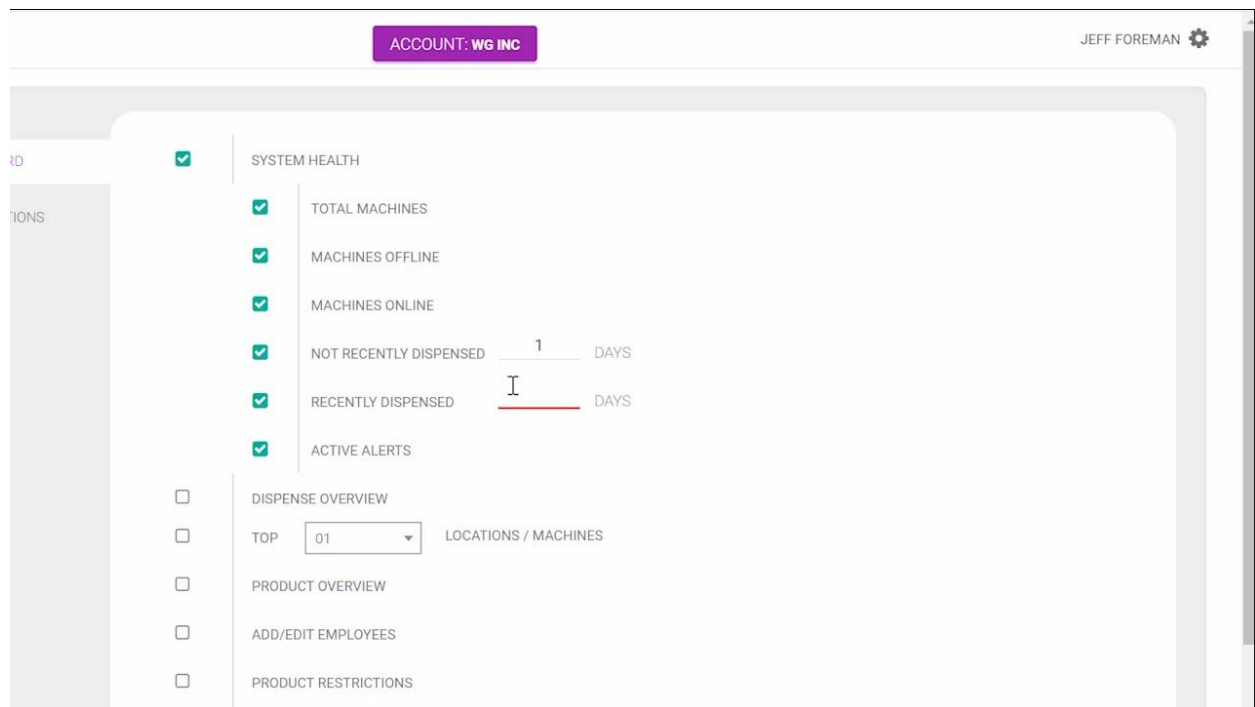**Dashboard**

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
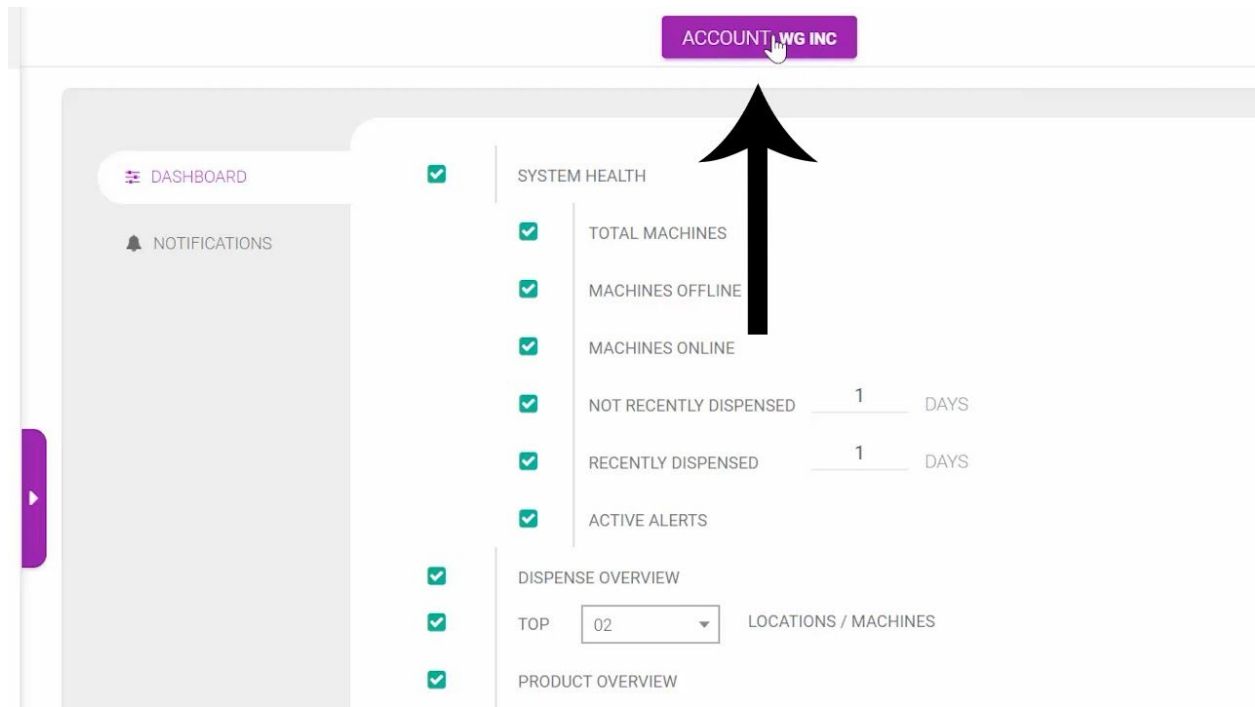- Automated Reports
- Hierarchy Count
- Users Count

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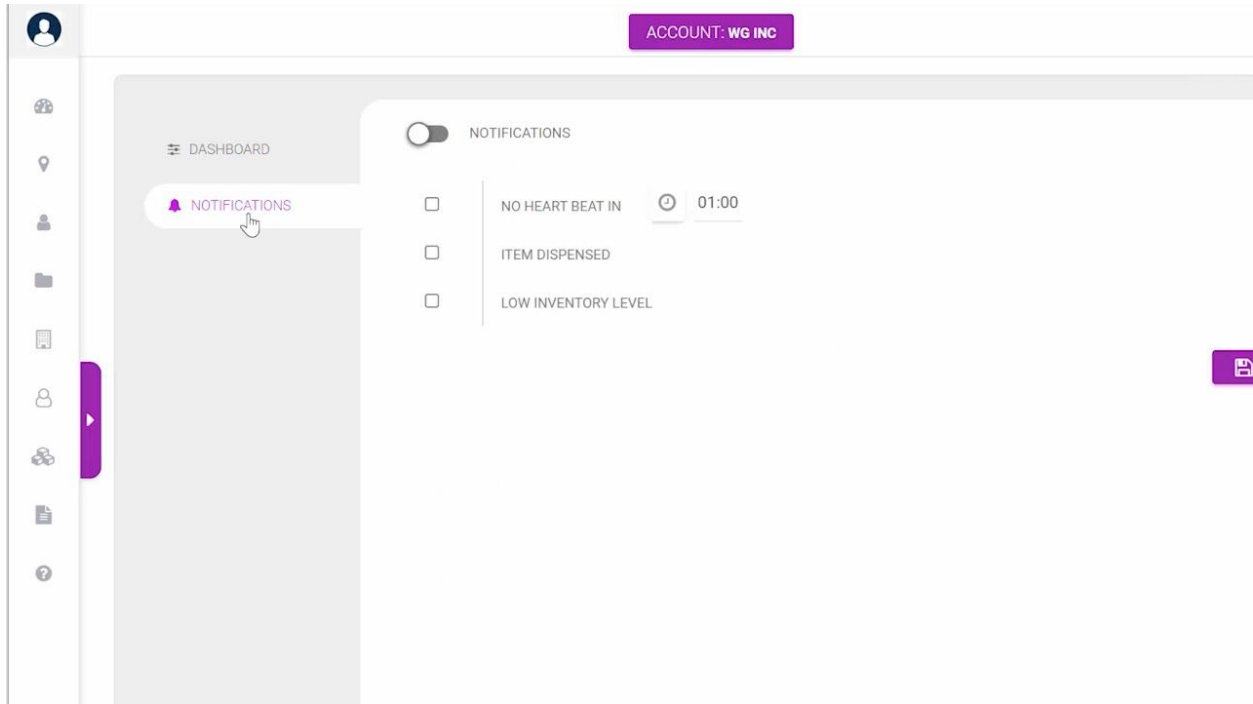
The Notifications page can be accessed here. In order to receive notifications at log in, click the Notifications, as shown above. From here, you can select:

- 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.
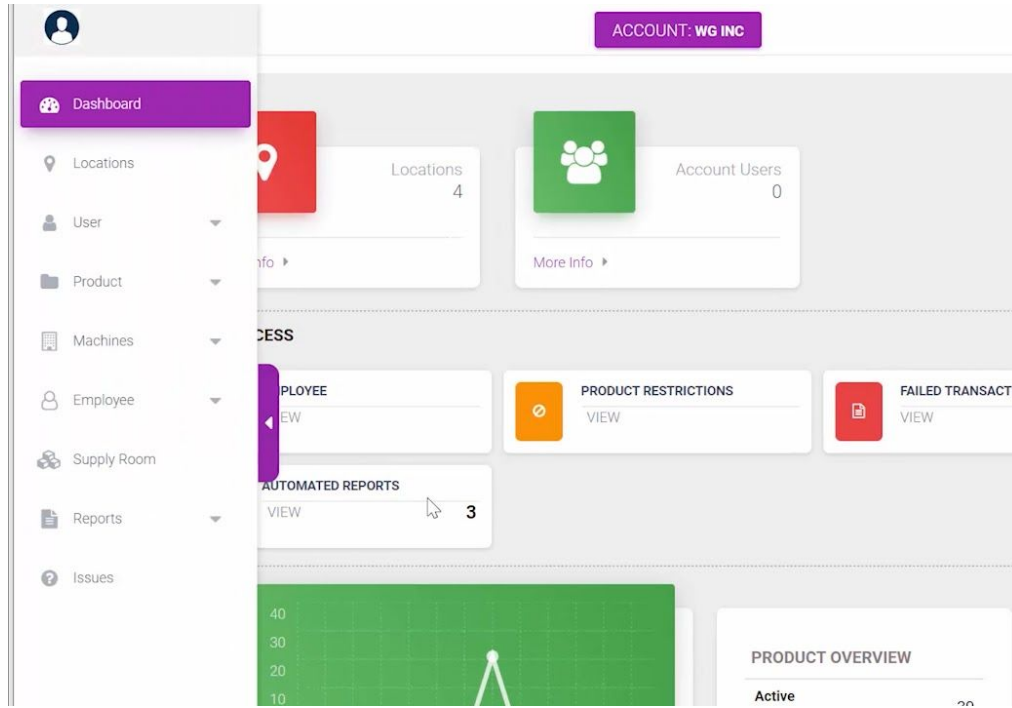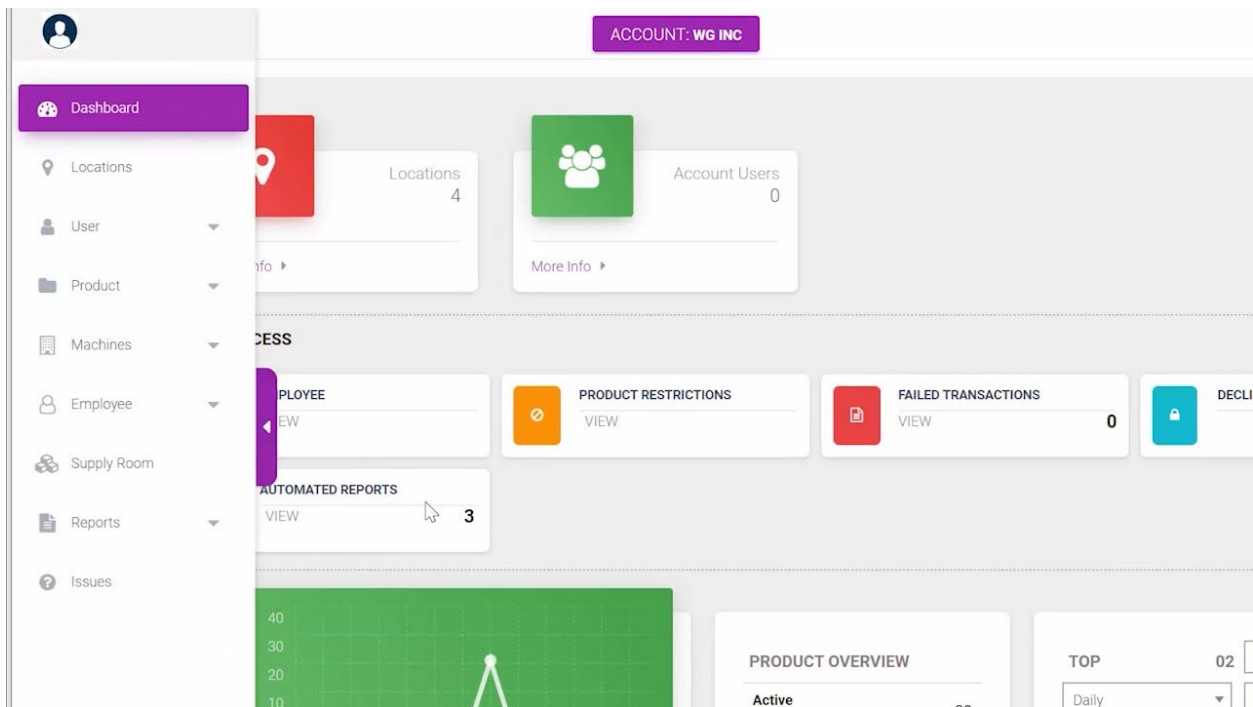
Each user has the ability to customize their own dashboard settings by:
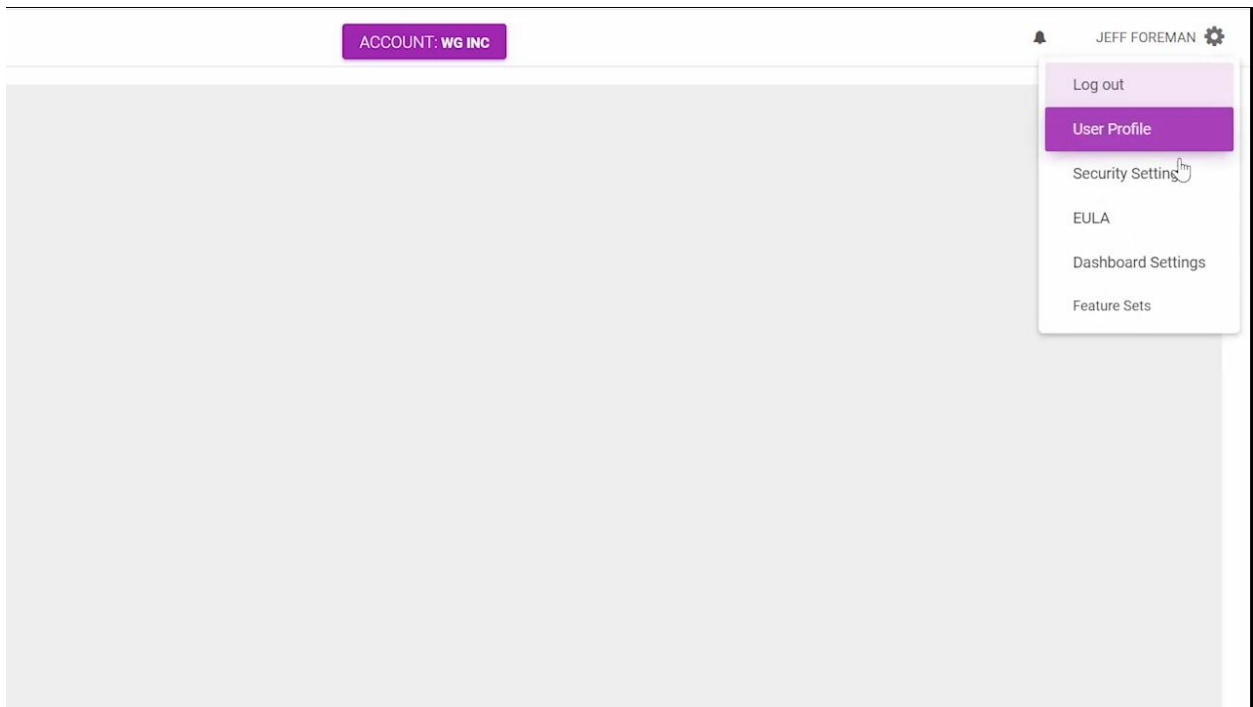- Dragging different sections to rearrange their location
- Rearrange information buttons with a certain section
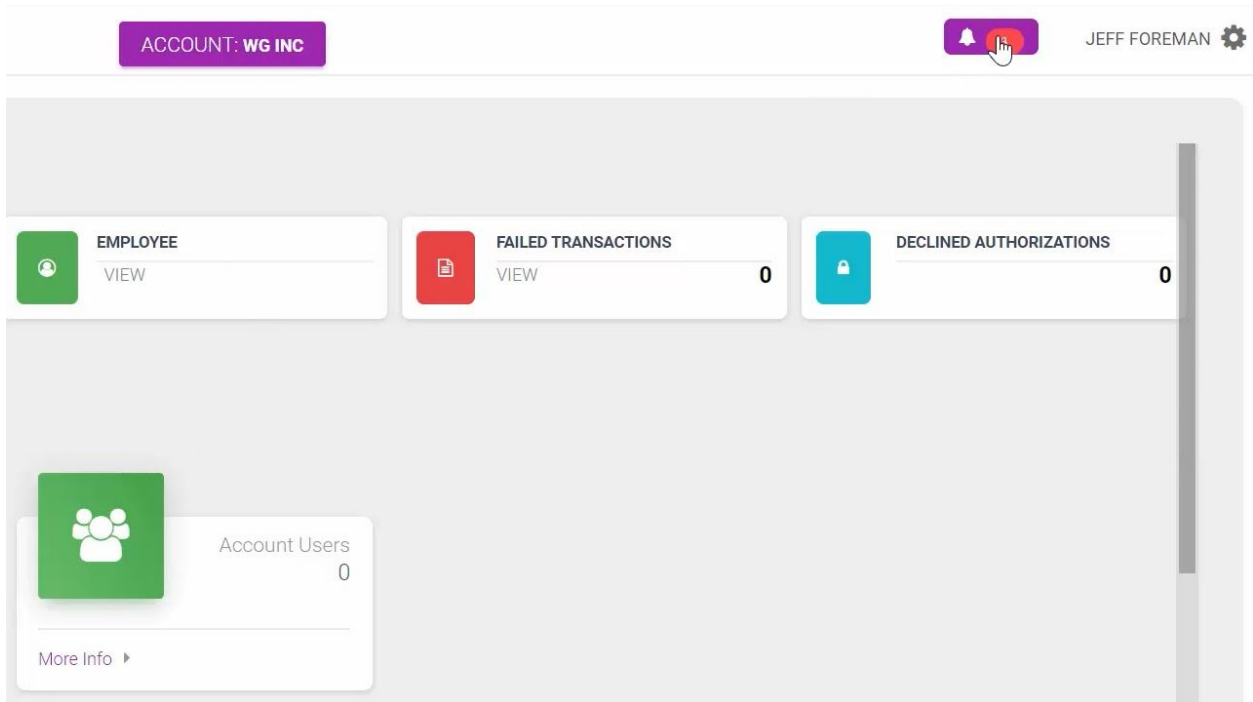
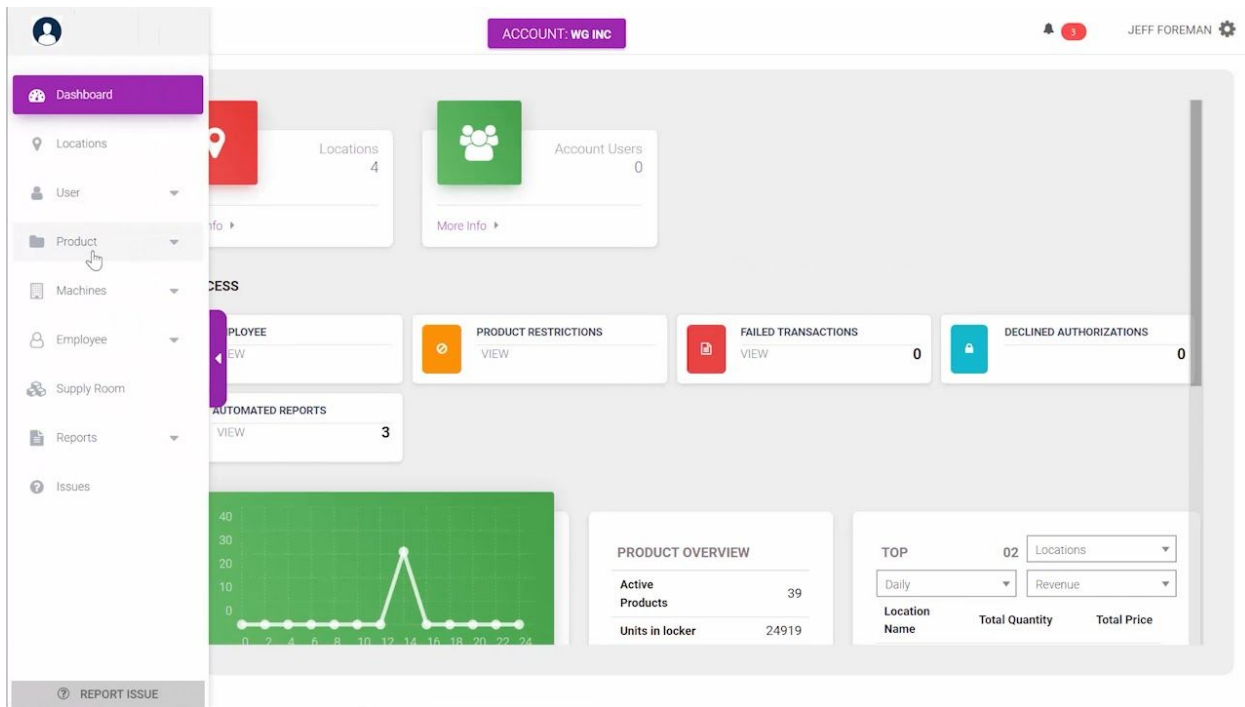Dashboard Notifications can be found in the upper right hand corner.

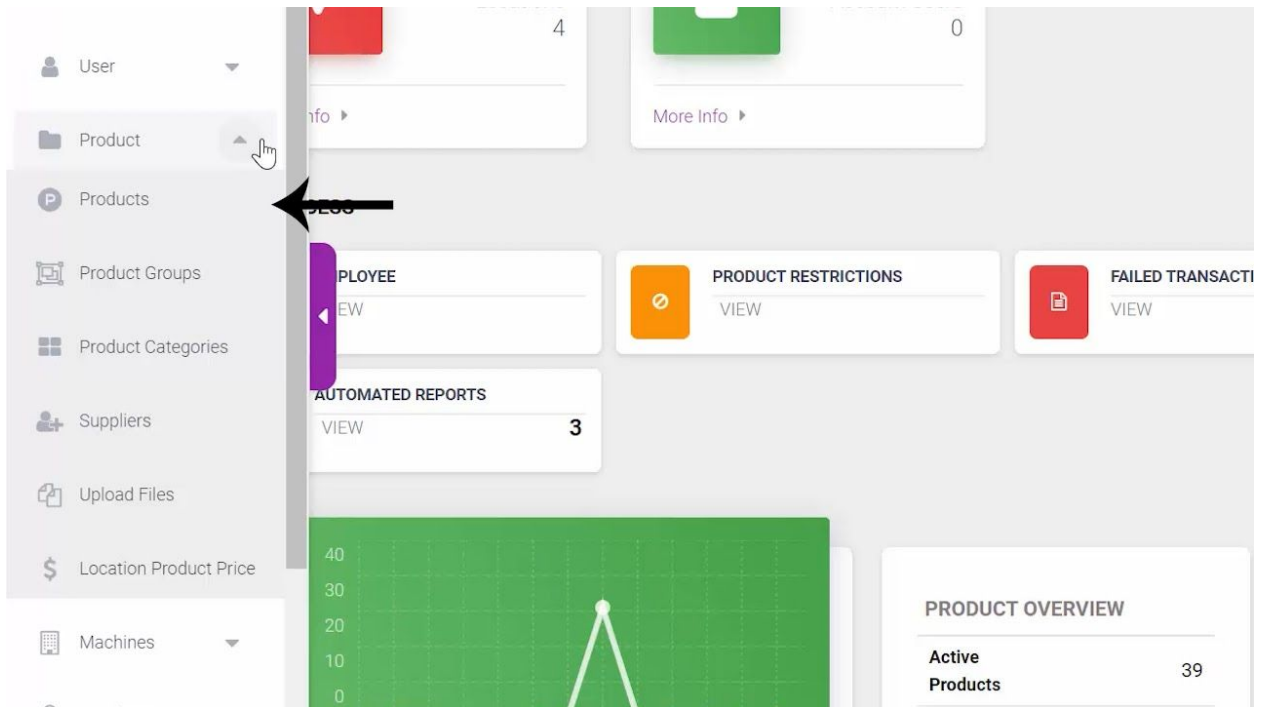Access the other tabs by clicking the arrow on the left.

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.

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

At the top of the page you can choose to:
- Download Template
- Export Current List
- Import Template
- Add New
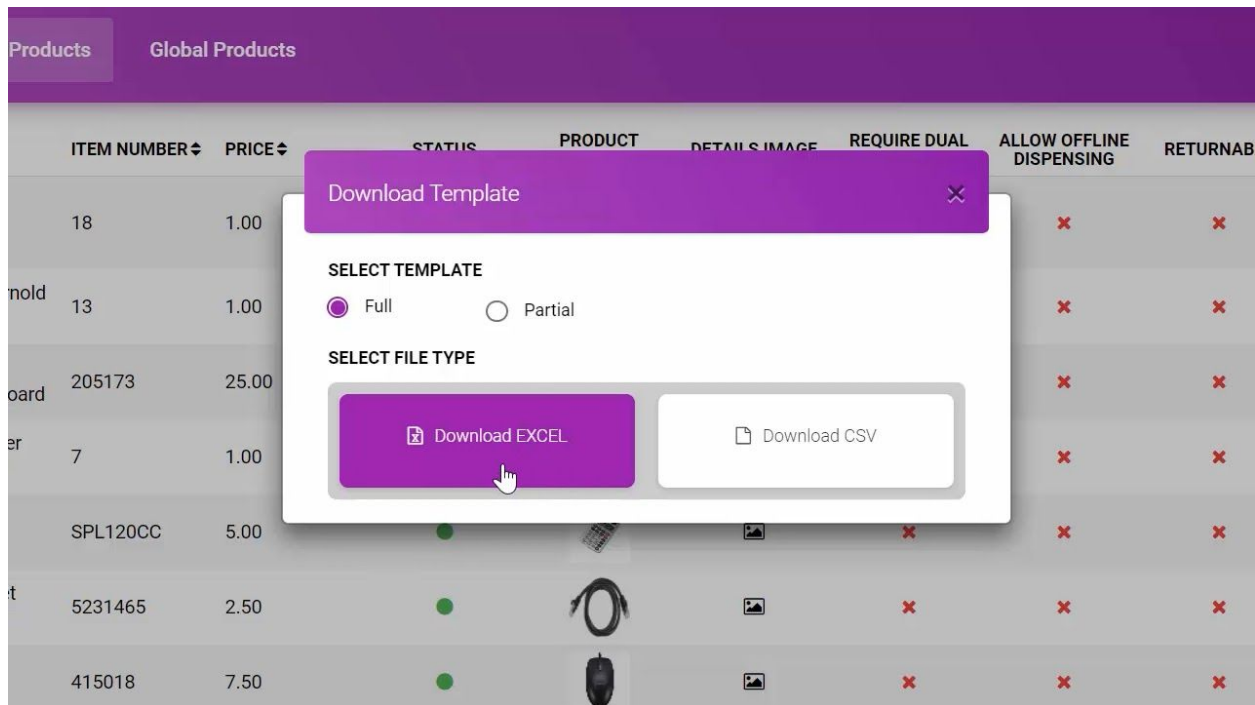
When you DOWNLOAD A TEMPLATE you can:
1. Pull up a full or partial template in either Excel or CSV file
2. Fill out necessary product information
3. Upload a bulk amount of products
4. Save the updated file to your computer
5. Import it into the Products Database

To add a new individual product select ADD NEW.

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

Reports

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.

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.

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.

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.

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.
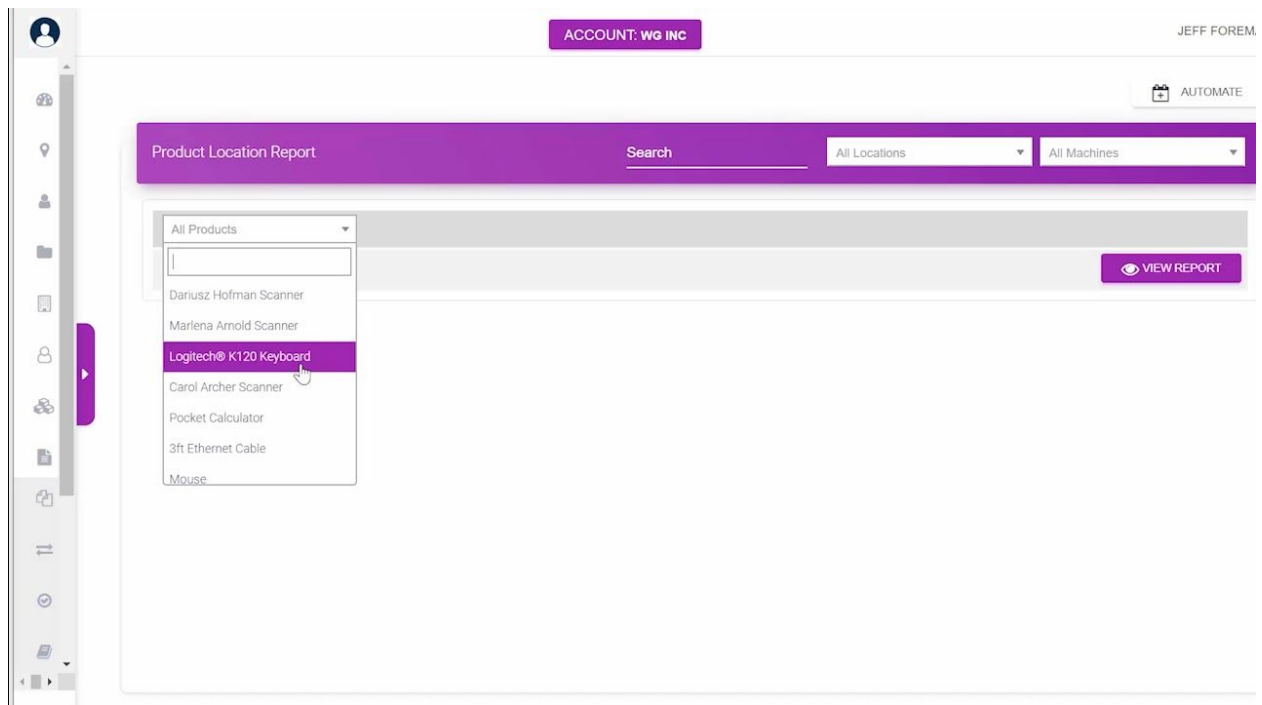
1. In The Product Location Report you can choose a product from this drop down menu to see where the product chosen has been dispensed from.
2. In this report you can see the:
    a. Product
    b. Location
    c. Machine
    d. Selection
    e. Dispensed Quantity
    f. Current Count
        i. The 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

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

EXPORT   PRINT   AUTOMATE

Search   All Locations ▾   All Machines ▾

From 📅 06/26/2020   To 📅 06/26/2020

DISPENSED QUANTITY   31   👁 VIEW REPORT

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

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

ACCOUNT: WG INC   JEFF FOREM.

EXPORT   PRINT   AUTOMATE

Unsold Product Report   Search   All Locations ▾   All Machines ▾

Today ▾   From 📅 06/26/202   To 📅 06/26/2020

UNSOLD PRODUCT QTY   30848   👁 VIEW REPORT

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

« ‹ **1** 2 › »

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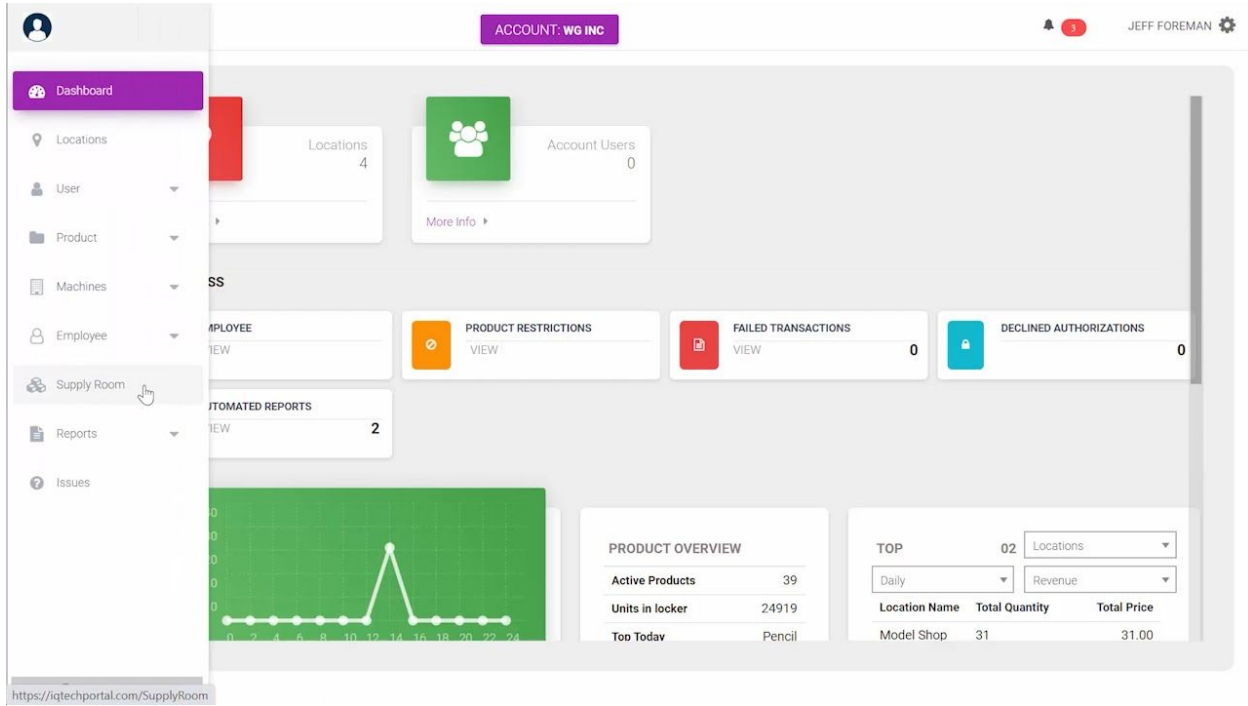
The Supply Room tab displays the supply rooms under your account.

LOCATION ⇕	VIEW	TRANSFER	HISTORY	REMOVE	ACTIONS	
Main Lobby	👁	⇄	↺	✖	✎	🗑
Tech Alcove	👁	⇄	↺	✖	✎	🗑
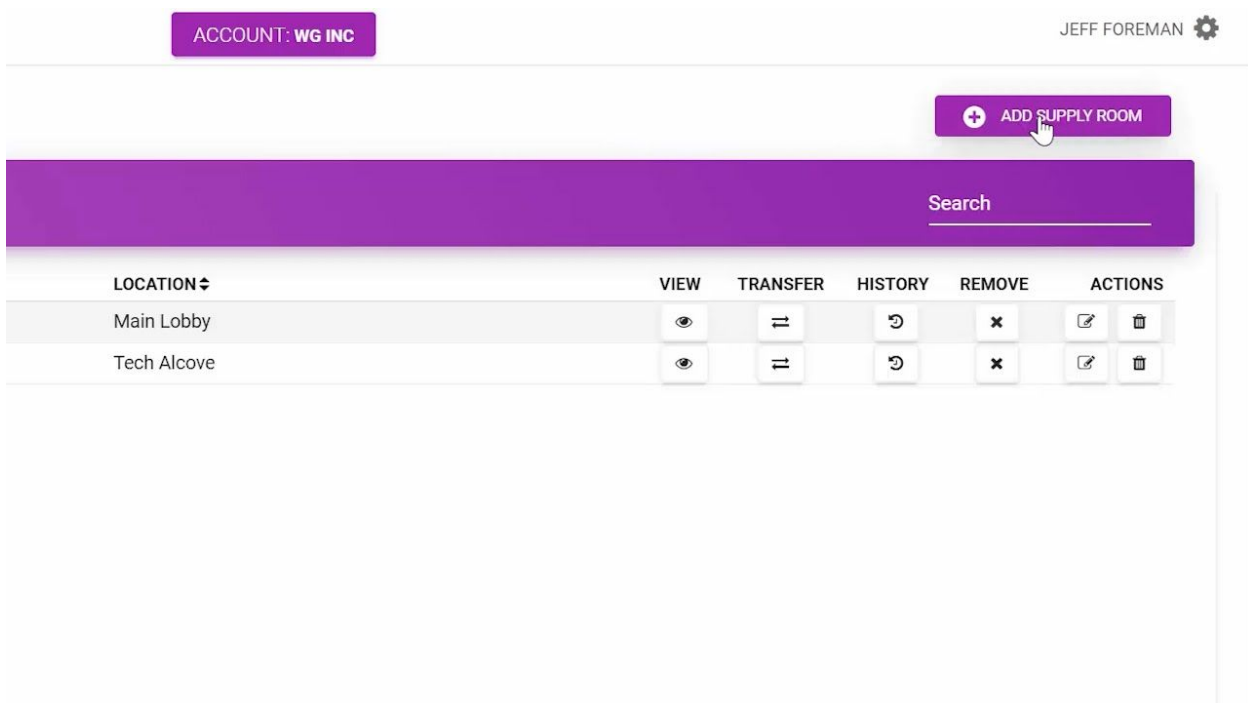
You can click the button in the upper right hand corner to ADD A SUPPLY ROOM. You can add a name and select a location.

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 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			10	Restock
Stapler	504308	25				Restock
Eraser	987465	10				Restock
Staples	2382439	85				Restock
Rubber Bands	97319273	35				Restock
Ballpoint Pen	RSP12733	60				Restock
Sticky Notes	12803	35				Restock
HD Webcam	394303228	25				Restock
Highlighter	1982730	10				Restock
Pencil	156325	10				Restock
5ft Ethernet Cable	5208439	25				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		Restock
Mouse	415018	15		Restock
3ft Ethernet Cable	5231465	15		Restock
Pocket Calculator	SPL120CC	25		Restock
Logitech® K120 Keyboard	205173	25		Restock

Select Supply Room ▼

Main Lobby - Supply Room

Tech Alcove - Supply Room

Search

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.

JEFF FOREMAN

BACK

Search

TOTAL QUANTITY ⬍	PAR LEVEL ⬍			ACTIONS
25	10			

EXPIRATION DATE ⬍	REMOVE QUANTITY	REASON	DESCRIPTION
		Discontinued ▼	
		Discontinued ▼ ..	

| 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.
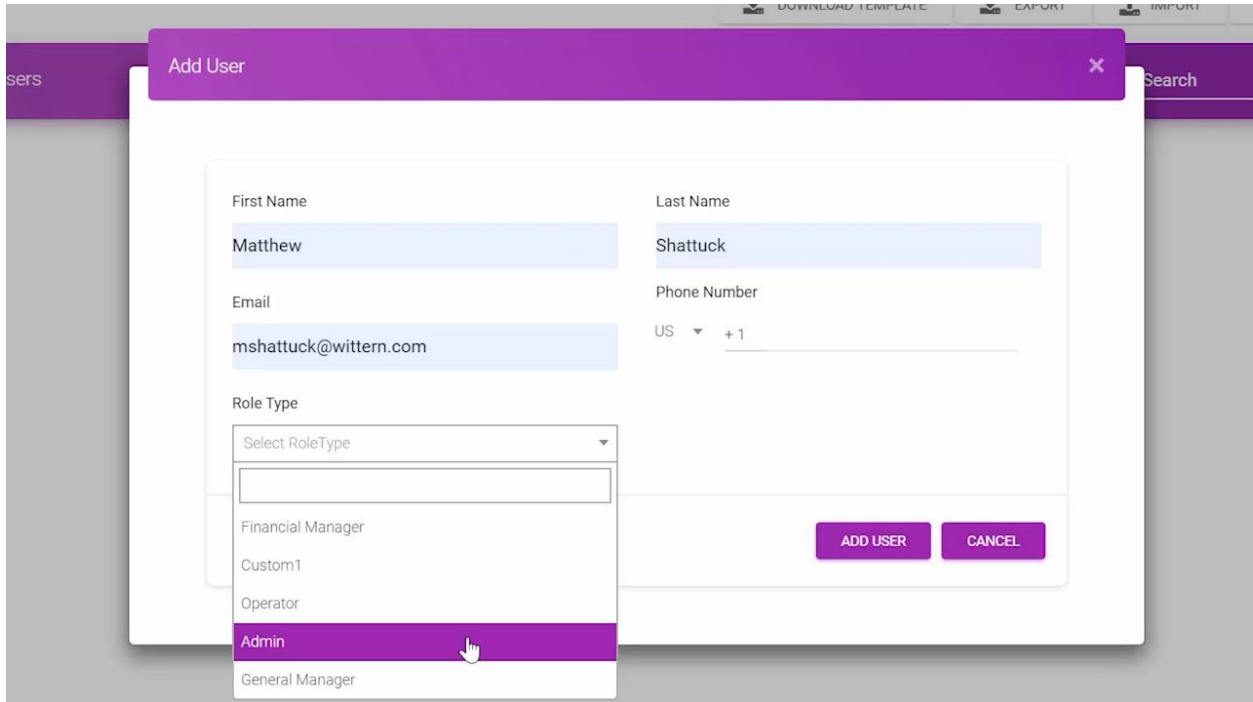
USER
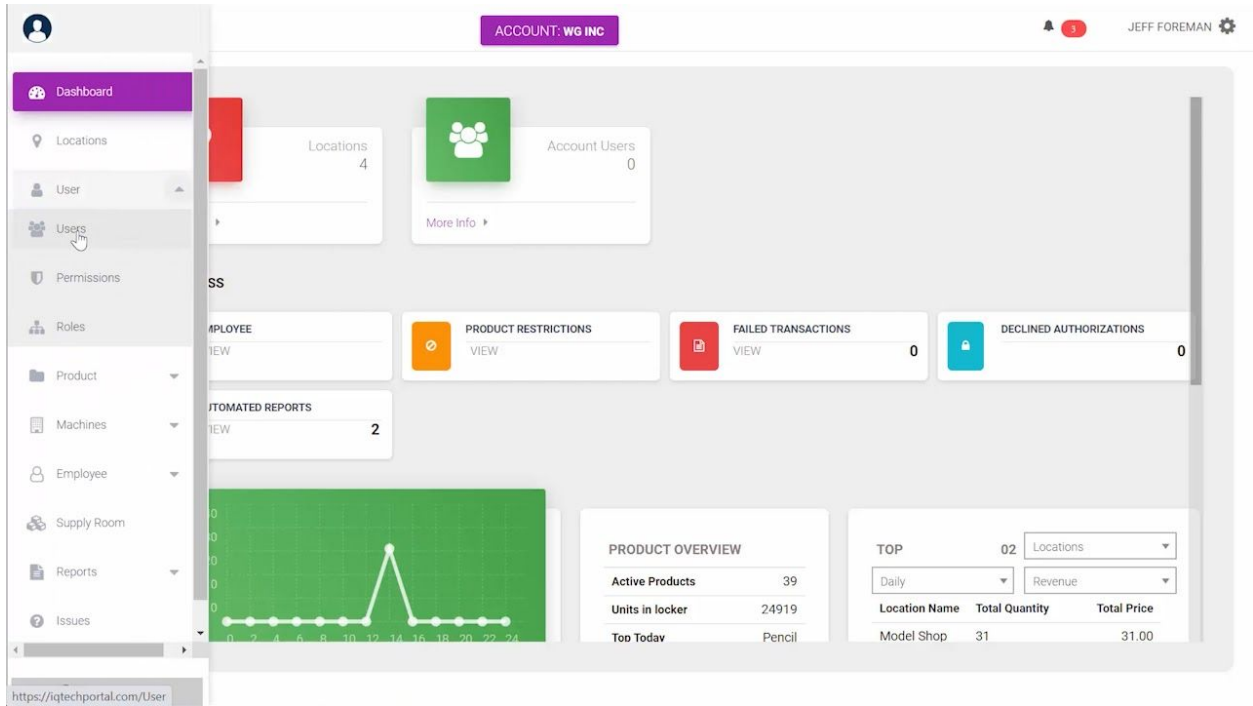
To add a new user to the system select USERS under the USER drop down here on the left.
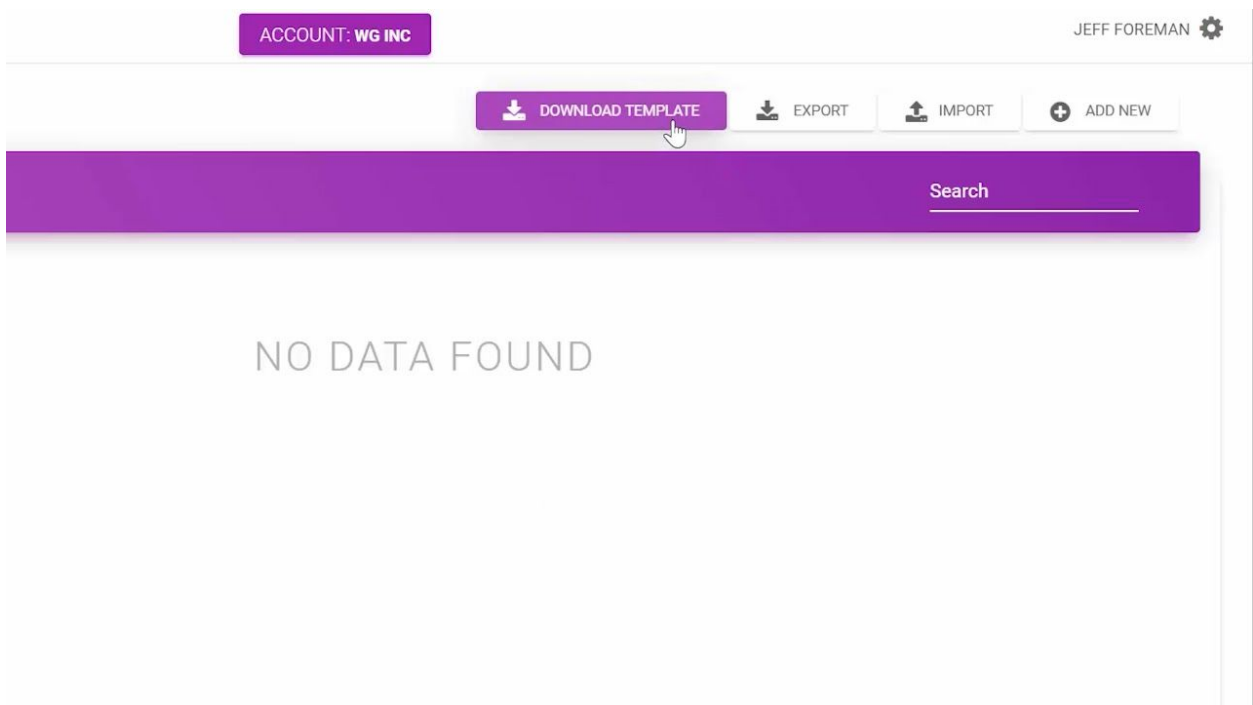
You can download a template in order to later import a bulk number of users. You can also export a list and import your list of users. To add a single user select ADD NEW.
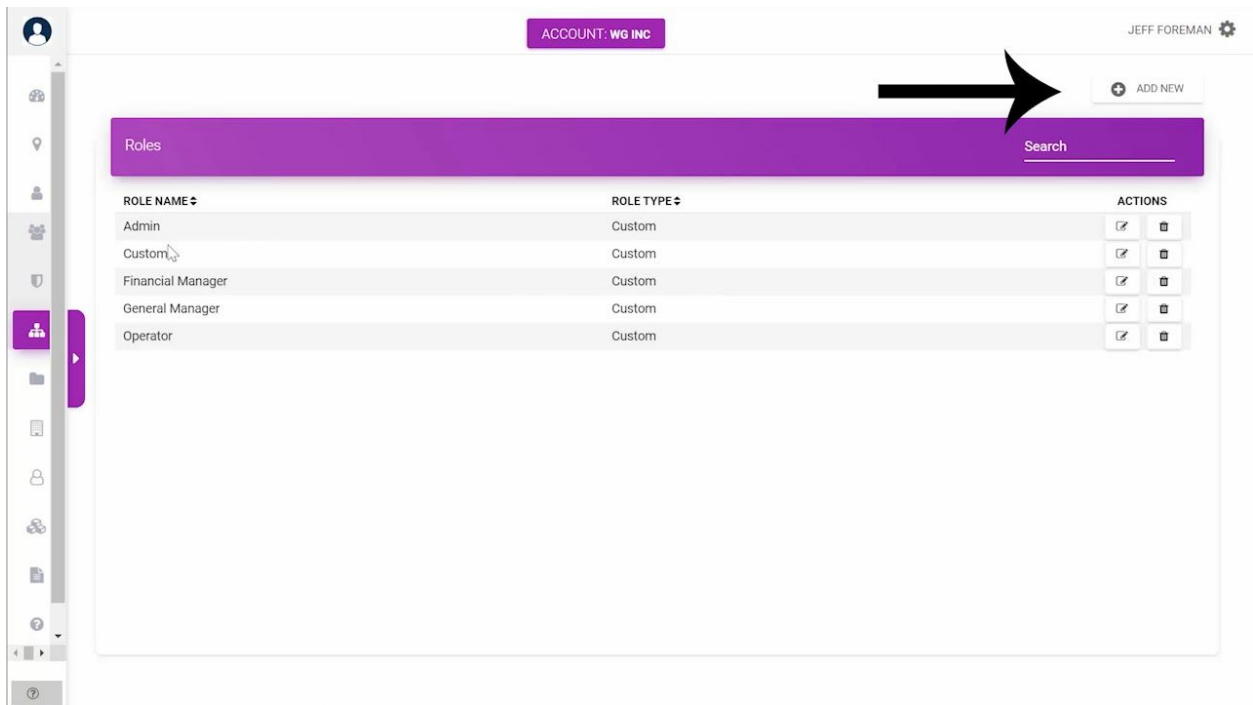
Fill out name and email, phone number is optional & role type. When complete select ADD User. You cannot duplicate users on the site.
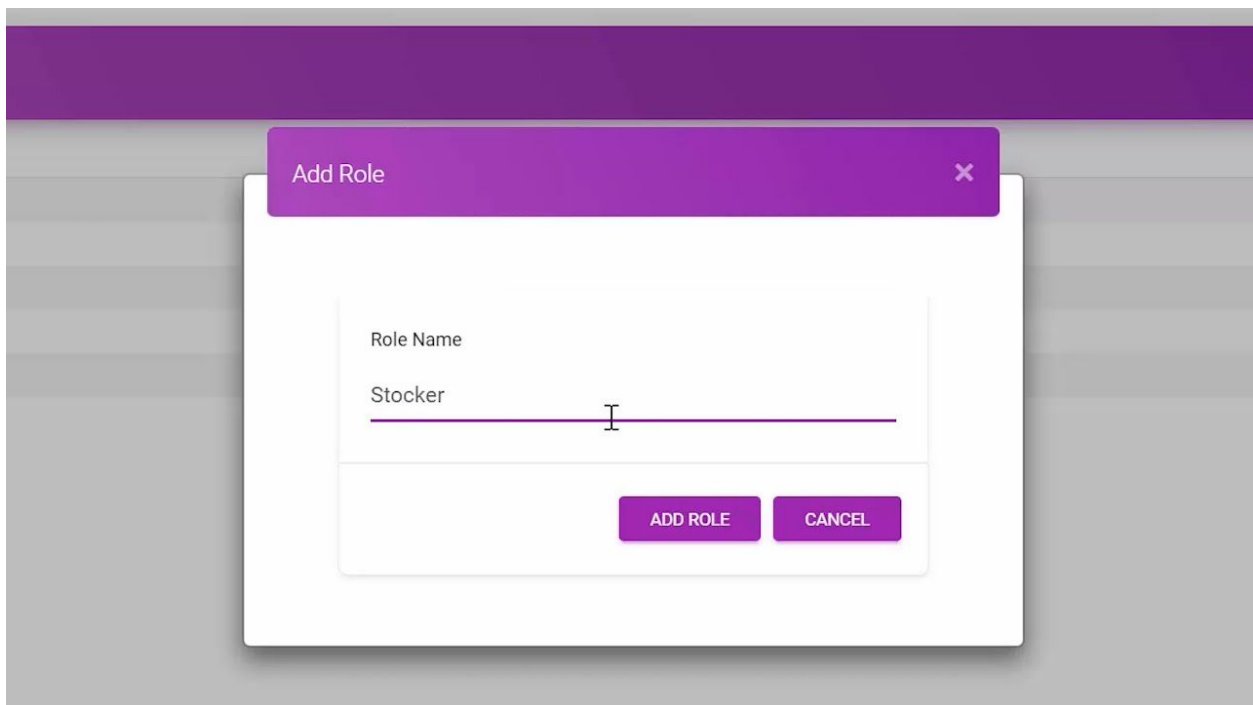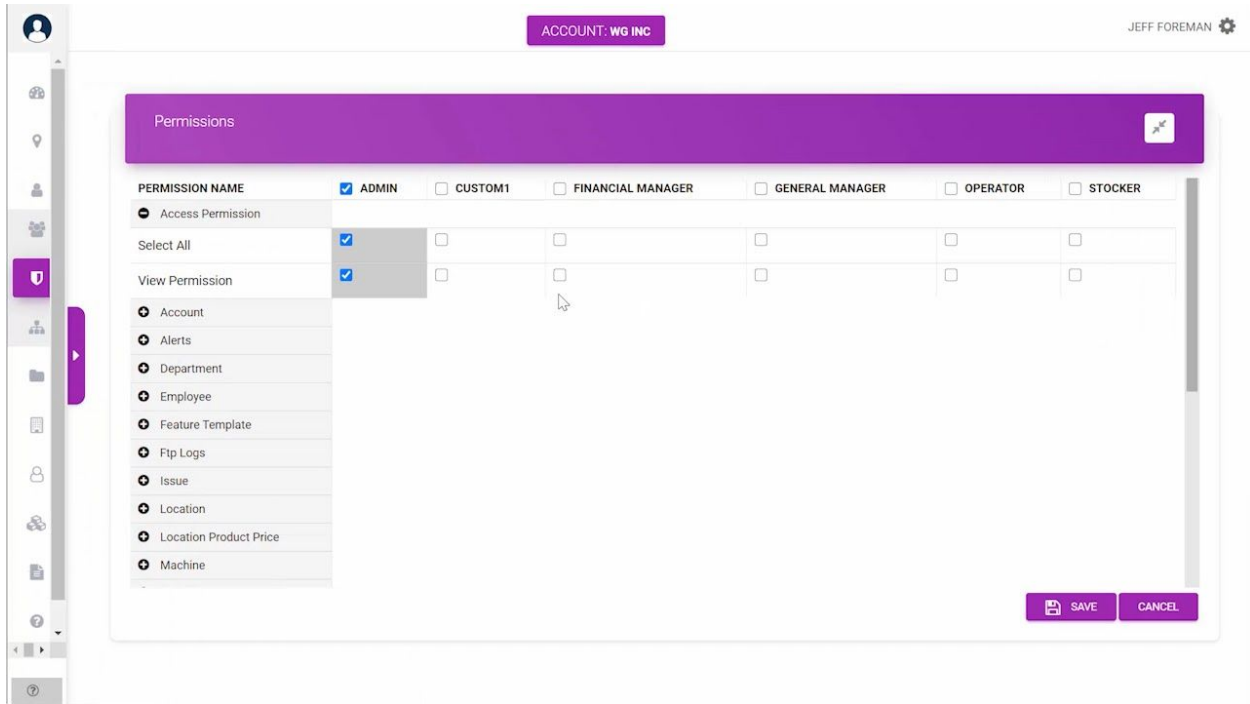
Roles
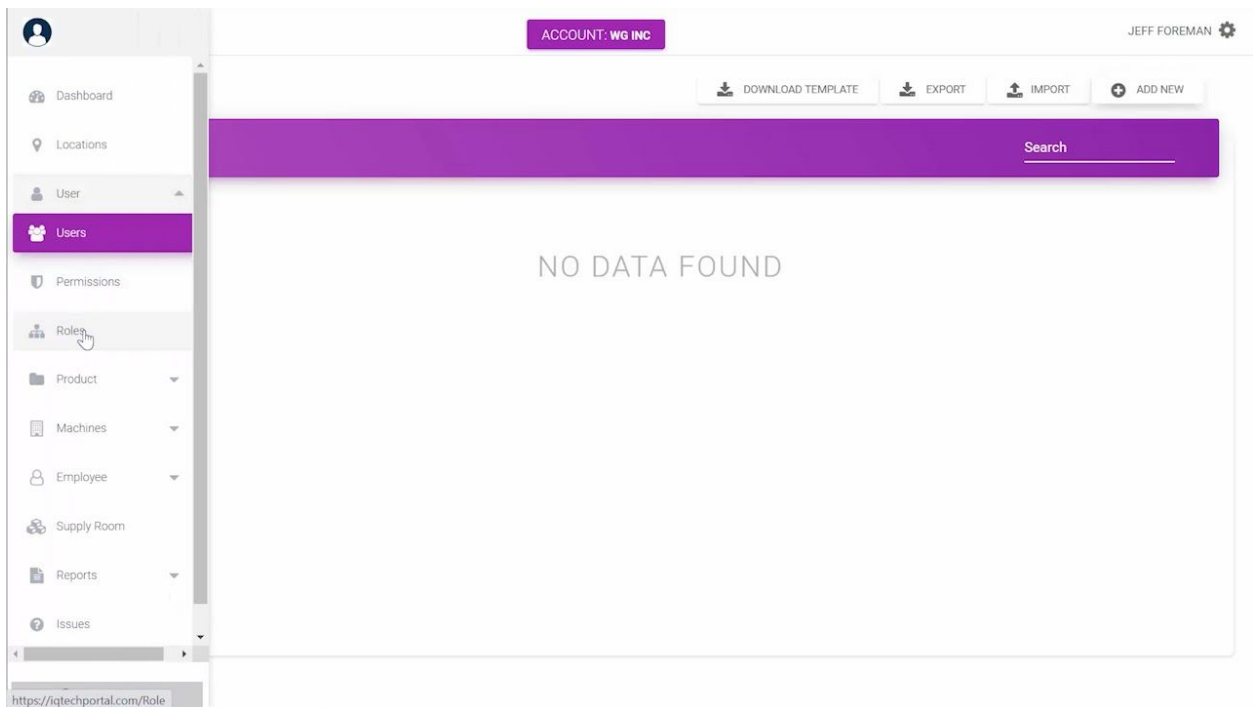
The ROLES page can also be accessed under the USER drop down menu.

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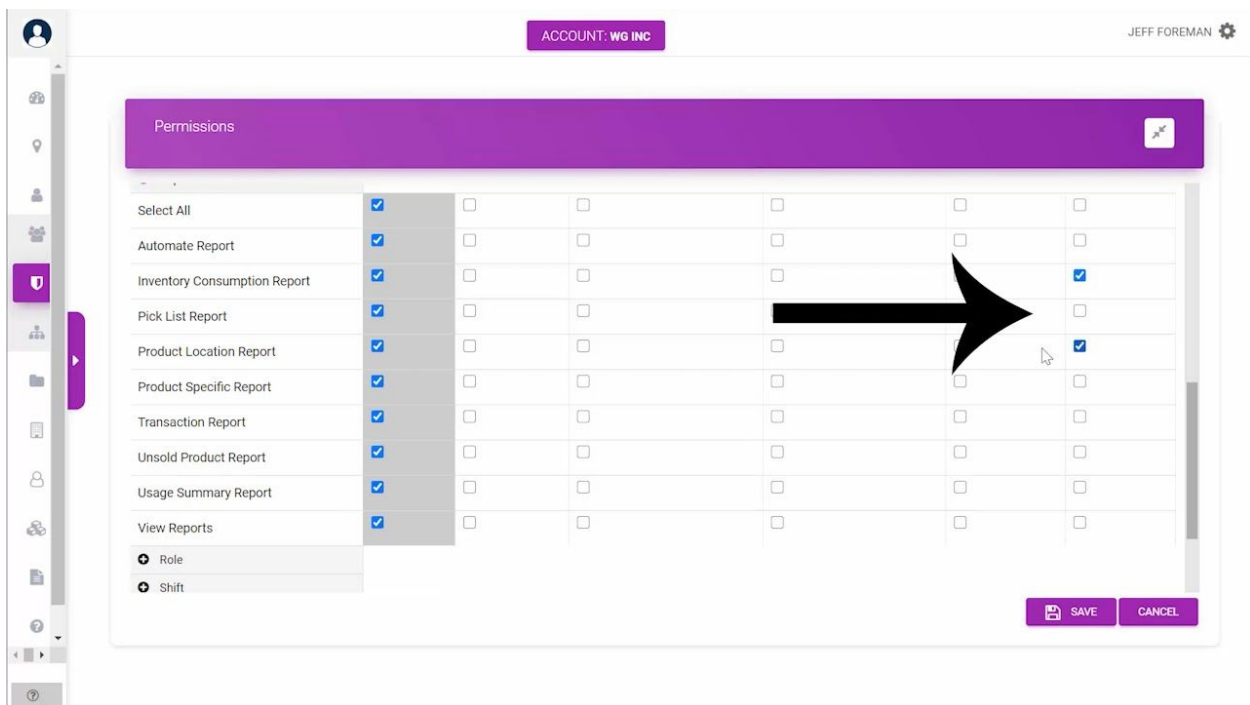
In this example our new role will only need access to INVENTORY CONSUMPTION REPORT AND PRODUCT LOCATION REPORT. Be sure Click Save. The Stocker will now only be able to view these two pages.

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

- 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.

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.

NAME ⇕	TYPE OF ISSUE ⇕	SERIAL NUMBER ⇕	TIME ⇕
Jeff Foreman	Hardware	1234567	6/26/2020 4:26:25 PM

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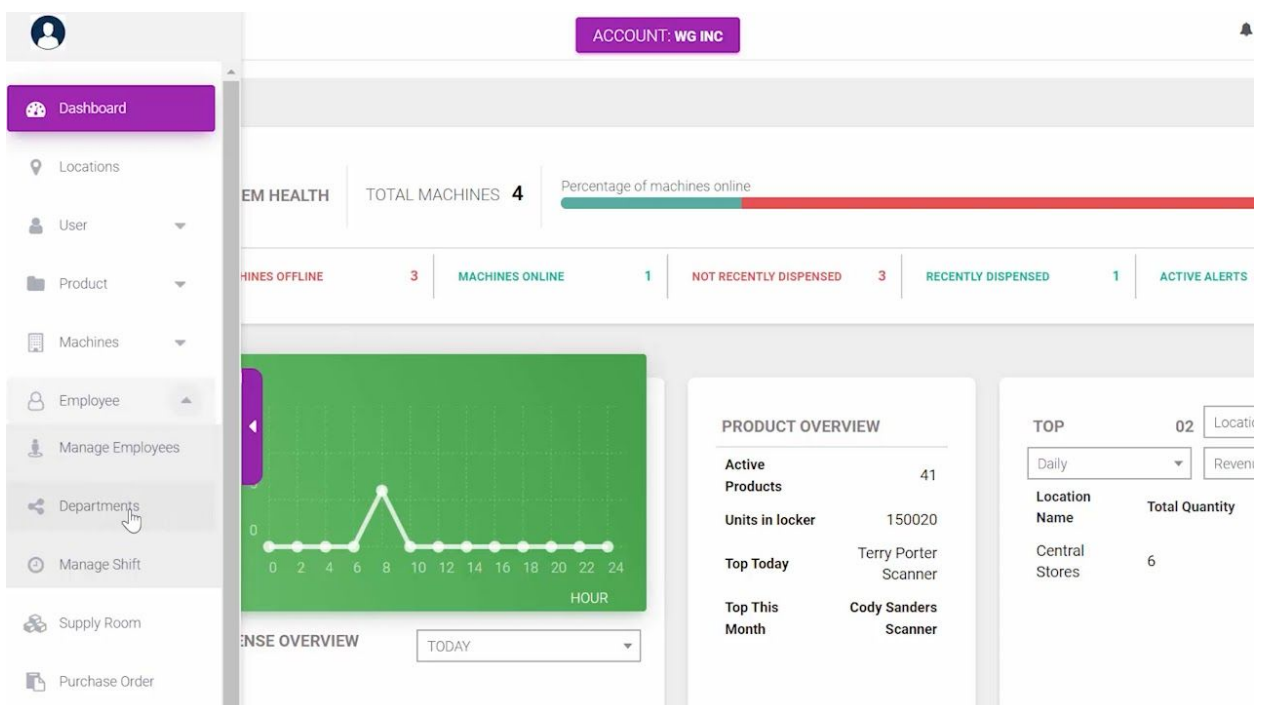

⊕ ADD NEW

Search

TYPE OF ISSUE ⇕	SERIAL NUMBER ⇕	TIME ⇕	ACTION
Hardware	1234567	6/26/2020 4:26:25 PM	👁

4. Clicking on the eye here on the right will allow you to view more on the issue.
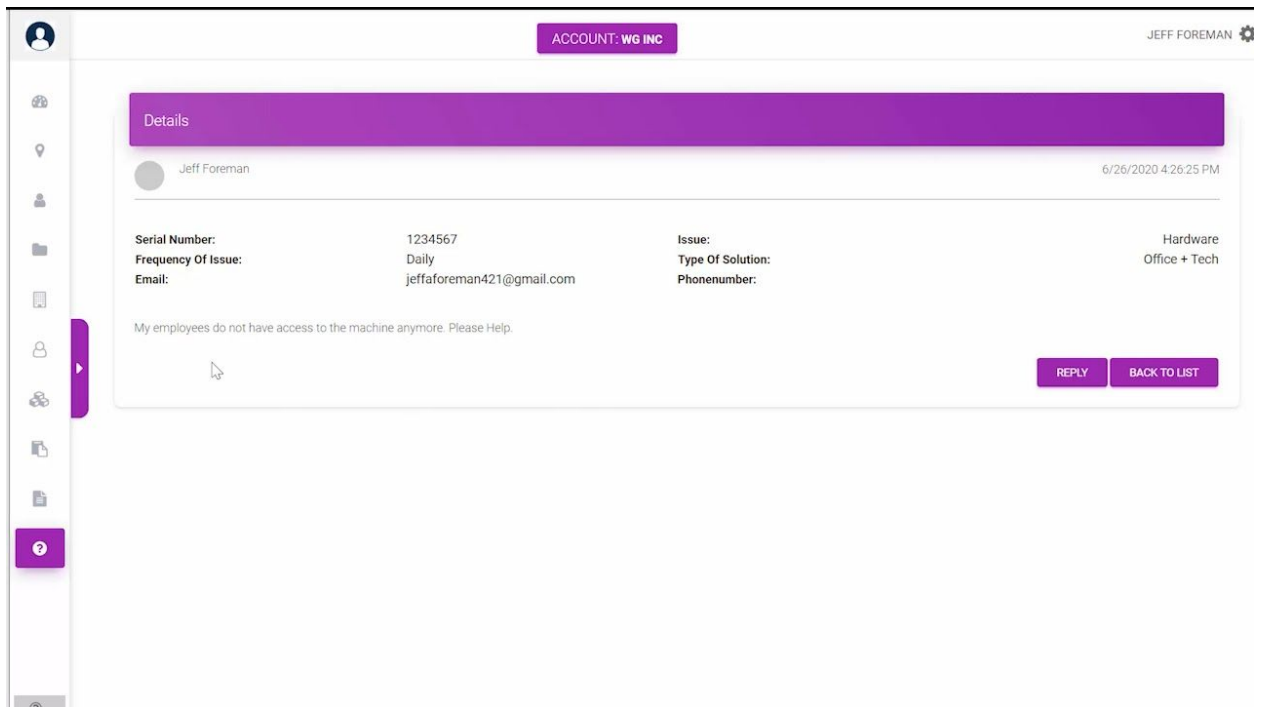
5. The IQ Technology Support team will be in contact with the user who submitted the issue. You can view the issues that have been resolved or fixed by selecting the fixed page.

Departments

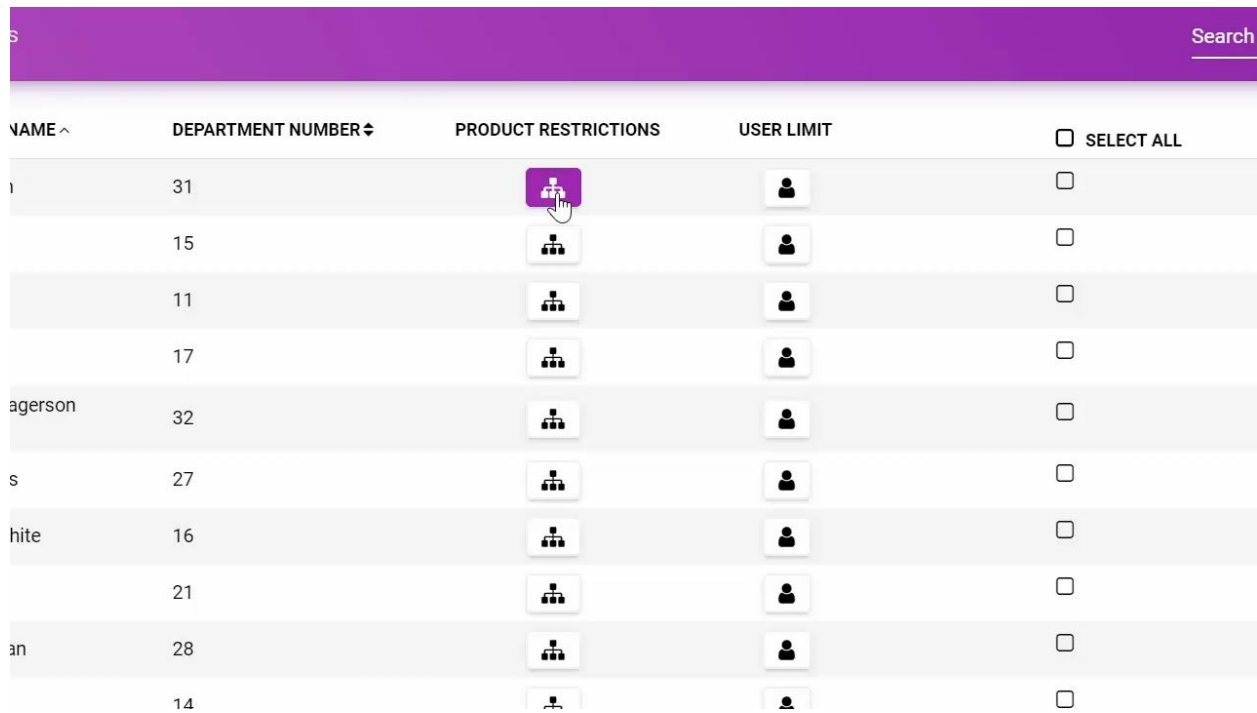● Follow these steps to use the Departments menu under the Employee tab.

Departments				
DEPARTMENT NAME ∧	**DEPARTMENT NUMBER** ⇕	**PRODUCT RESTRICTIONS**	**USER LIMIT**	☐ SELE
Administration	31	🔗	👤	☐
Alan Hopkins	15	🔗	👤	☐
Bradley Weir	11	🔗	👤	☐
Carol Archer	17	🔗	👤	☐
Chad Sarver Jagerson Scanner	32	🔗	👤	☐
Chris Moraetes	27	🔗	👤	☐
Christopher White	16	🔗	👤	☐
Cody Sanders	21	🔗	👤	☐
Dariusz Hofman	28	🔗	👤	☐
Dennis Davis	14	🔗	👤	☐

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 ⚙

⊕ ADD NEW   👥 ASSIGN EMPLOYEE
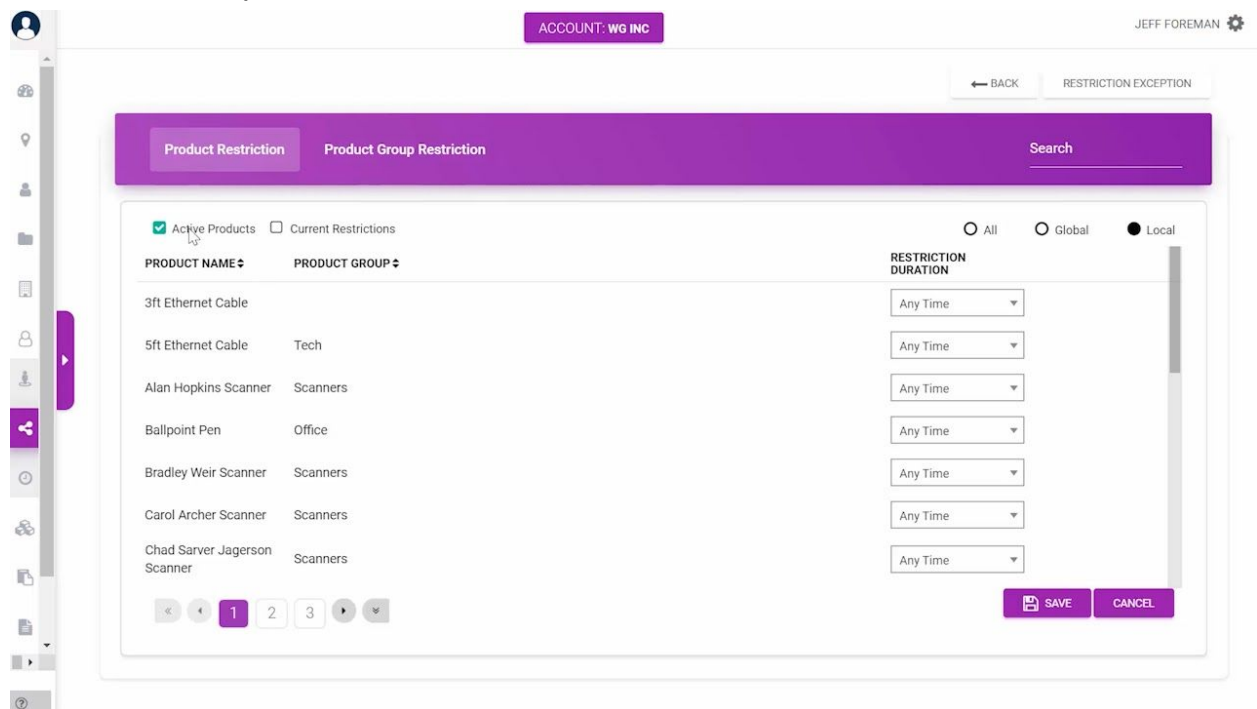
Search

DEPARTMENT NUMBER ⇕	PRODUCT RESTRICTIONS	USER LIMIT	☐ SEL T ALL	ACTIONS
1	🔗	👤	☐	✎ 🗑
5	🔗	👤	☐	✎ 🗑
1	🔗	👤	☐	✎ 🗑
7	🔗	👤	☐	✎ 🗑
2	🔗	👤	☐	✎ 🗑
7	🔗	👤	☐	✎ 🗑
5	🔗	👤	☐	✎ 🗑
1	🔗	👤	☐	✎ 🗑

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

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

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

Products ☐ Current Restrictions   ○ All   ○ C

AME ⇕	PRODUCT GROUP ⇕		RESTRICTION DURATION
t Cable			May Not Dispense ▼
t Cable	Tech		
ns Scanner	Scanners		May Not Dispense
en	Office		Hour 👆
ir Scanner	Scanners		Shift
er Scanner	Scanners		Day
r Jagerson	Scanners		Week
			Month
			Any Time ▼

5. Set duration and limit for the desired product.

NAME ⌃	DEPARTMENT NUMBER ⇕	PRODUCT RESTRICTIONS	USER LIMIT	☐ SELECT ALL
n	31	⛓	👤	☐
	15	⛓	👤	☐
	11	⛓	👤	☐
	17	⛓	👤	☐
agerson	32	⛓	👤	☐
s	27	⛓	👤	☐
hite	16	⛓	👤	☐
	21	⛓	👤	☐
an	28	⛓	👤	☐
	14	⛓	👤	☐

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.

Number of items employees can select during each vend session   10   ✓ UPDATE

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.

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.

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

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

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

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

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

Export the current employee list here.

To simply add a single employee click ADD NEW.

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	⬤	✖	☐	RESET	CLEAR	✎
7076	English	Marketing	⬤	✖	☐	RESET	CLEAR	✎
85244	English	Carol Archer	⬤	✖	☐	RESET	CLEAR	✎
100315	English	Marlena Arnold	⬤	✖	☐	RESET	CLEAR	✎
7037	English	HR	⬤	✖	☐	RESET	CLEAR	✎
7051	English	Sales	⬤	✖	☐	RESET	CLEAR	✎
7049	English	HR	⬤	✖	☐	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	⬤	✖	☐	RESET	CLEAR	✎
76	7076	English	Marketing	⬤	✖	☐	RESET	CLEAR	✎
244	85244	English	Carol Archer	⬤	✖	☐	RESET	CLEAR	✎
0315	100315	English	Marlena Arnold	⬤	✖	☐	RESET	CLEAR	✎
37	7037	English	HR	⬤	✖	☐	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.

# ⇕	BADGE # ⇕	LANG	DEPT ⇕	ACTIVE	FINGERPRINT / IGNORE		PIN	
	7028	English	HR	⬤	✖	☐	RESET	CLE
	7076	English	Marketing	⬤	✖	☐	RESET	CLE
4	85244	English	Carol Archer	⬤	✖	☐	RESET	CLE
15	100315	English	Marlena Arnold	⬤	✖	☐	RESET	CLE

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

LAST ⇕	FIRST ⇕	EMAIL ⇕	EMP # ⇕	BADGE # ⇕	LANG	DEPT ⇕	ACTIVE	FINGERPRINT / IGNORE		PIN	
Amos	Glenn	employee28@dfb55.com	1028	7028	English	HR	⬤	✖	☐	RESET	CL
Amos	Sara	employee76@dfb55.com	1076	7076	English	Marketing	⬤	✖	☐	RESET	CL
Archer	Carol		85244	85244	English	Carol Archer	⬤	✖	☐	RESET	CL
Arnold	Marlena		100315	100315	English	Marlena Arnold	⬤	✖	☐	RESET	CL
Availa	Muhammed	employee37@dfb55.com	1037	7037	English	HR	⬤	✖	☐	RESET	CL
Beer	Kierra	employee91@dfb55.com	1091	7091	English	Marketing	⬤	✖	☐	RESET	CL

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
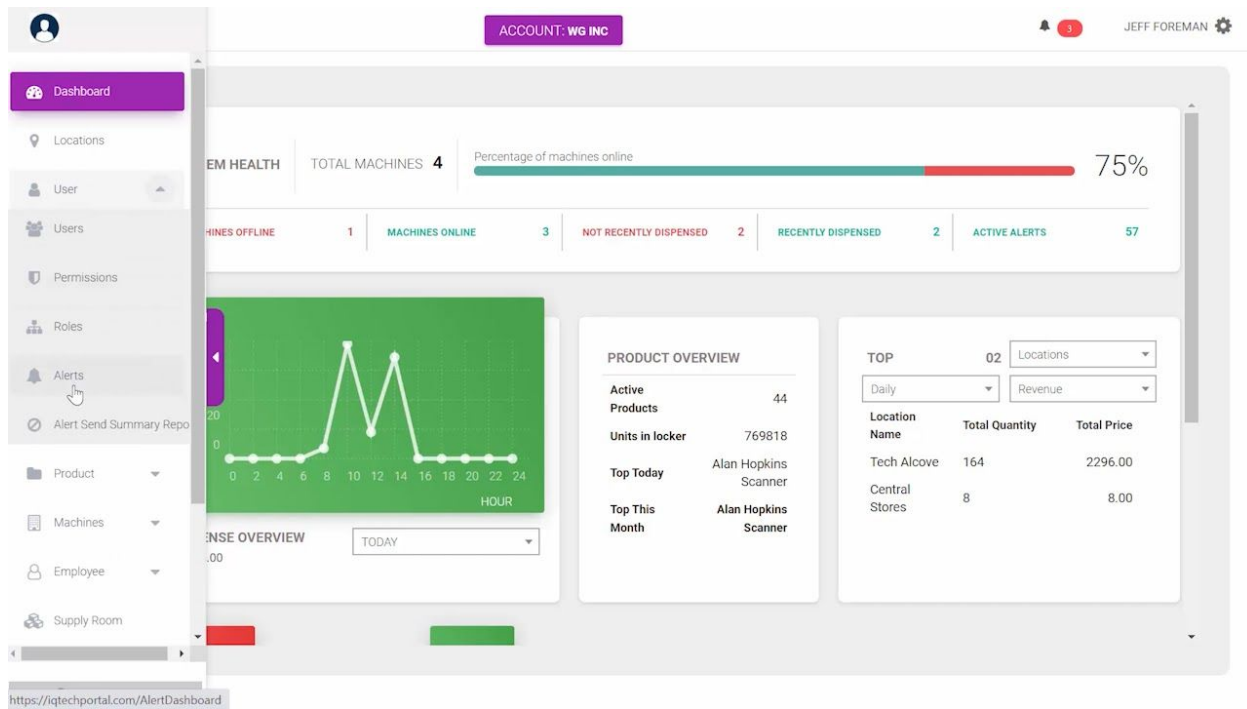
Follow these steps to use the IQ Software Alerts page.
1. On your IQ Dashboard page go to the tab on the left. Go to Users and select Alerts.
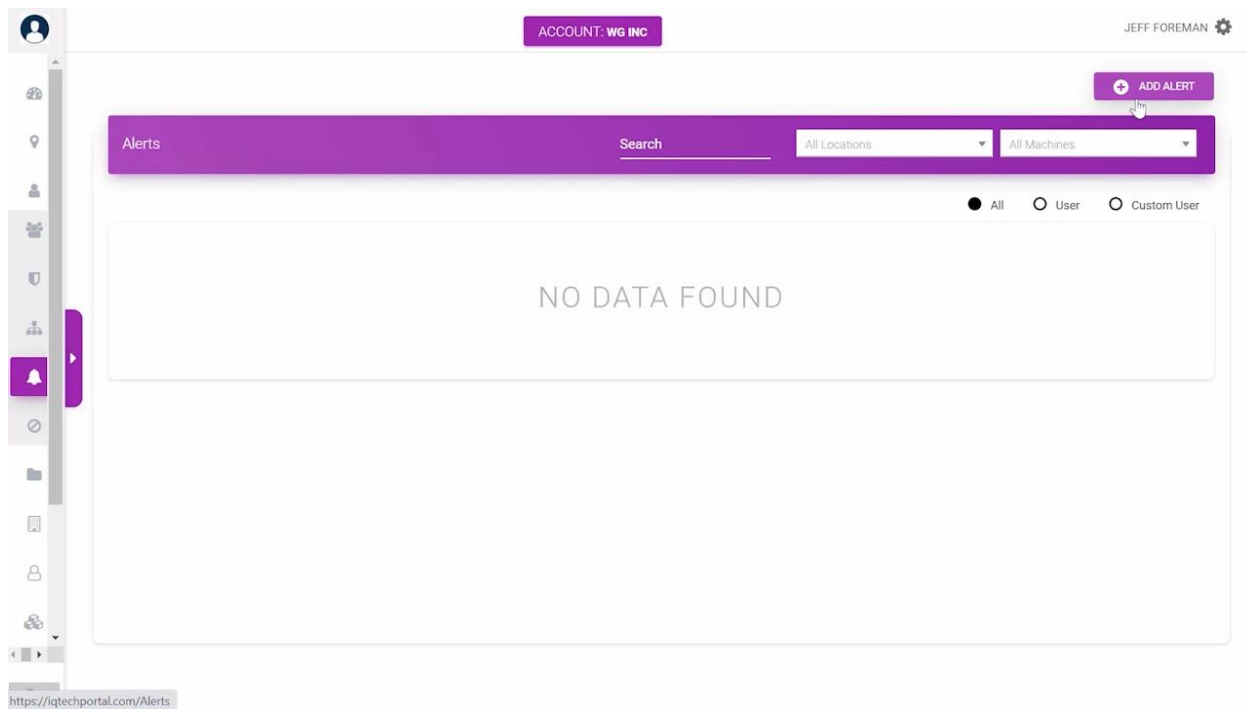
2. On the Alerts page you can see what Alerts have been created and Add new Alerts.
3. To add a new alert, click the ADD ALERT button in the upper righthand corner of the page.

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

- 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.

1. Here you can ADD A NEW LEVEL.
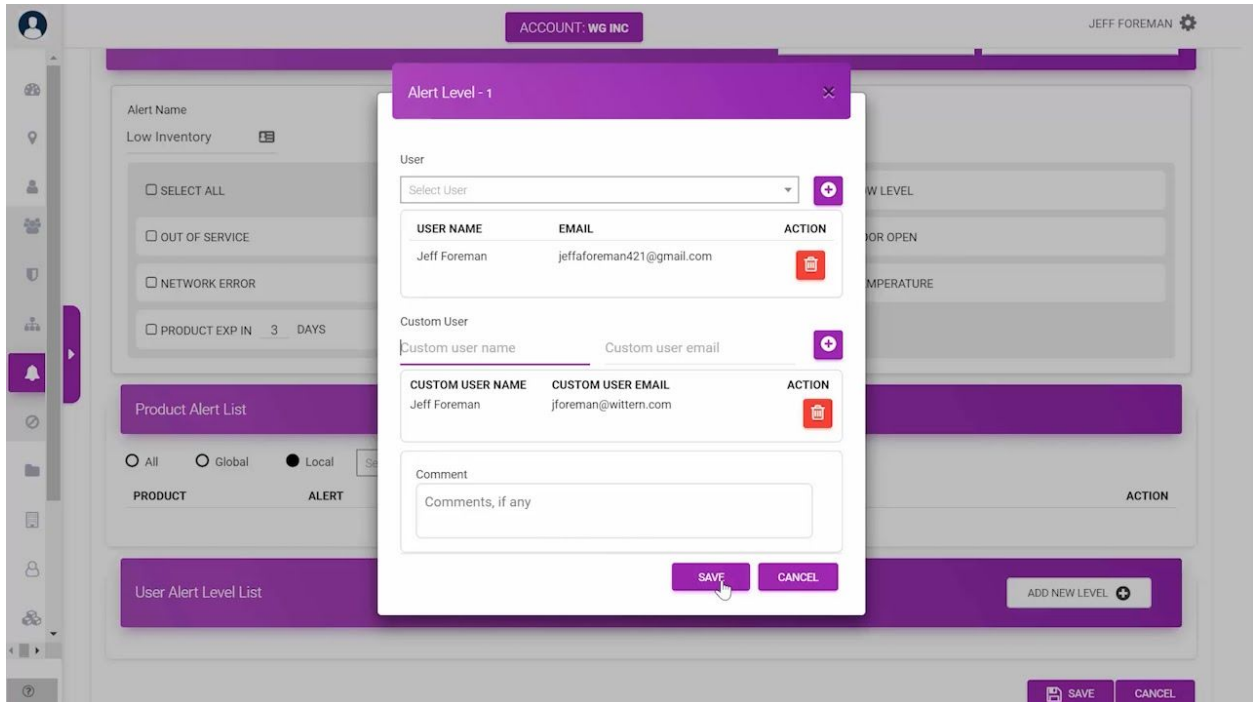
2. Adding a new level includes adding a user who will be alerted and their email address.
3. You can add users already registered or a custom user.
4. Click the plus button on the right to add the user and the red trash can button to delete.
5. This is Alert Level 1. Select save when complete.

● You can add another level to provide further oversight and accountability for employees.

1. Here we will create Alert Level 2.

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.

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

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

- 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.

1. View the Supply Room here.

2. Click up here to receive a product into the Supply Room.
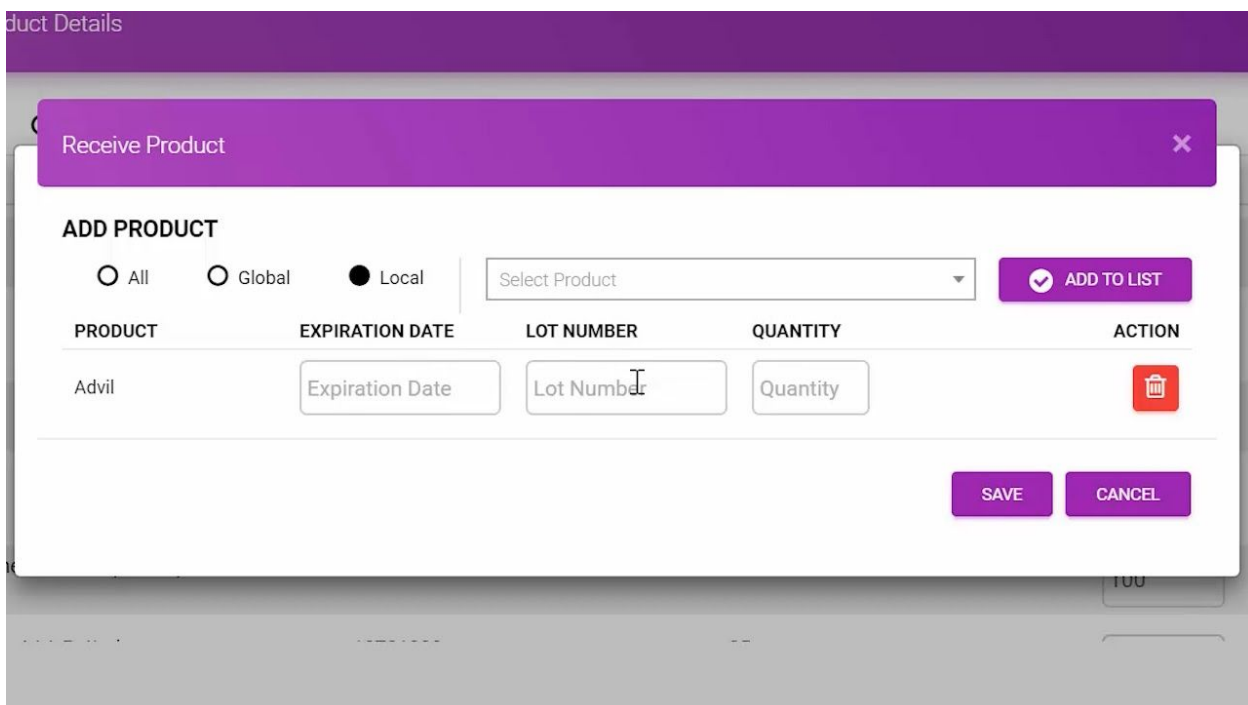
3. Select your product and ADD TO LIST.
4. Add expiration date, lot number and quantity here.
5. Be sure to save.

- 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.

Generate Pick List here.

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

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

The 15 new Advil for the machine is seen here. Clicking accept will move this quantity of product to the machine selected.
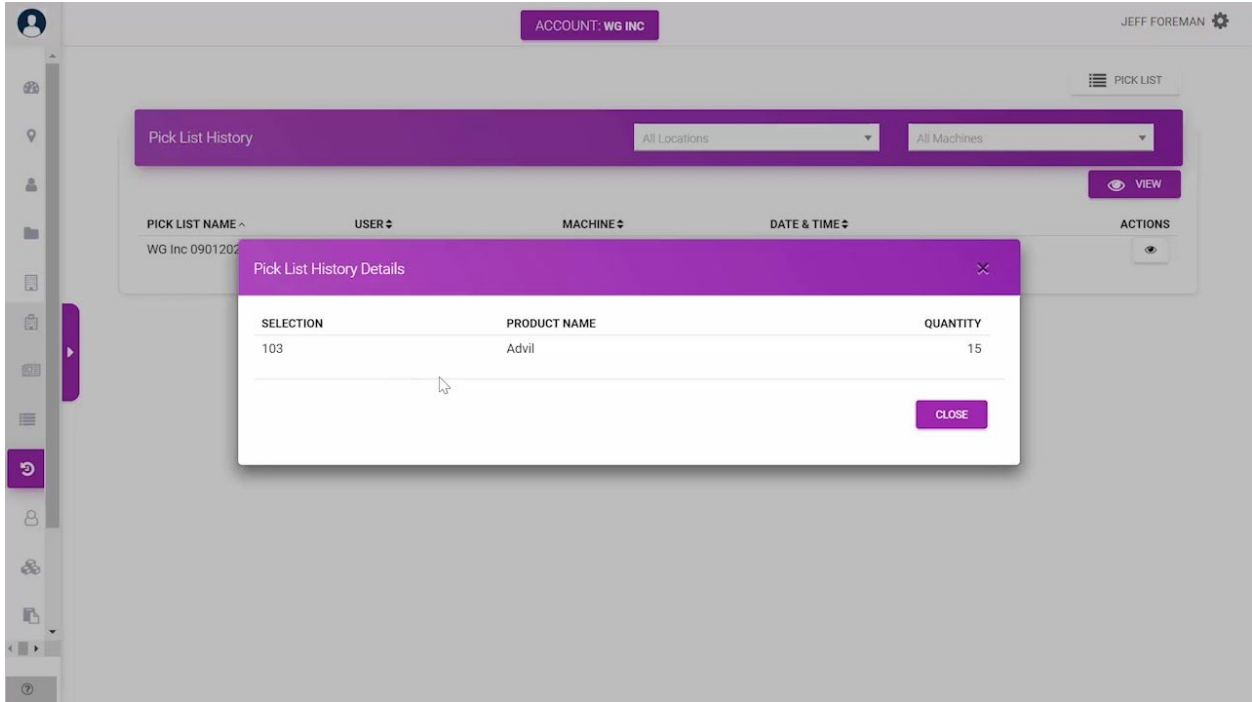
This will also appear in your Pick List history seen here. Showing what has been added where and when.
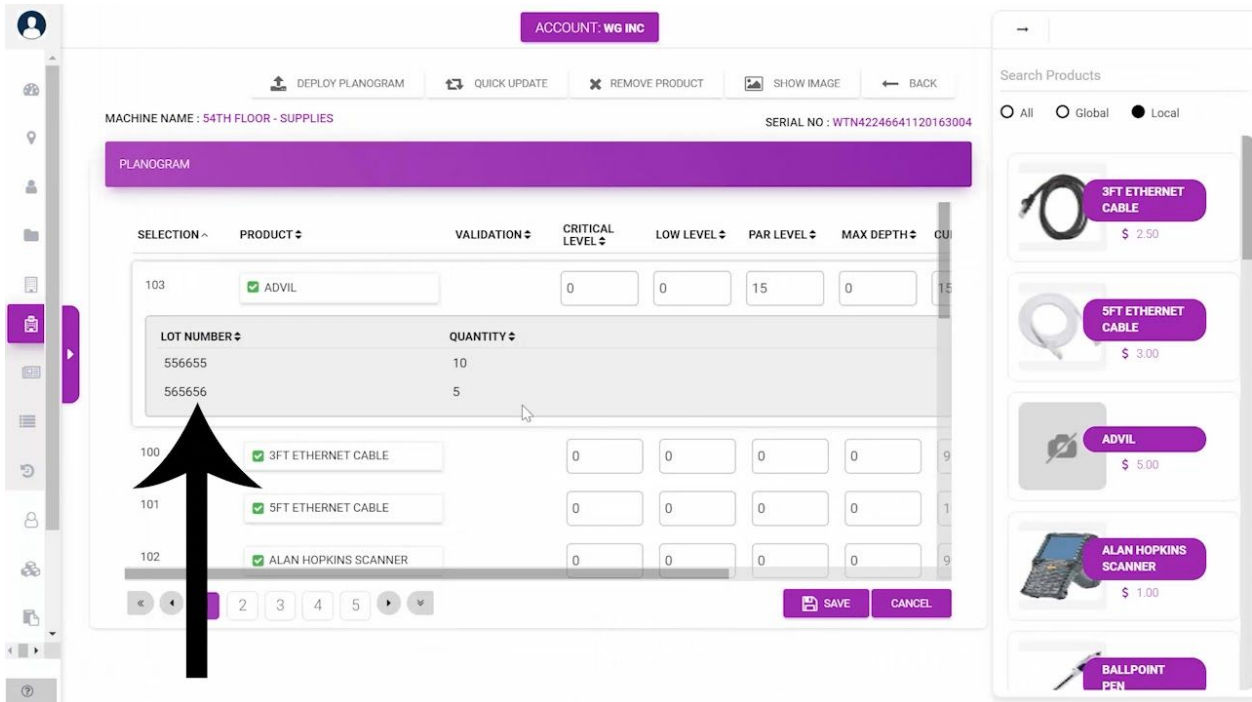
You can look at the machine and see the Product Lot number, quantity in the machine and expiration date.

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

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

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	☐ SELECT ALL
n	31	🔗	👤	
	15	🔗	👤	☐
rspoon	33	🔗	👤	☐
	11	🔗	👤	☐
	17	🔗	👤	☐
agerson	32	🔗	👤	☐
hompson	35	🔗	👤	☐
s	27	🔗	👤	☐
White	16	🔗	👤	☐
	21	🔗	👤	☐

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.

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.
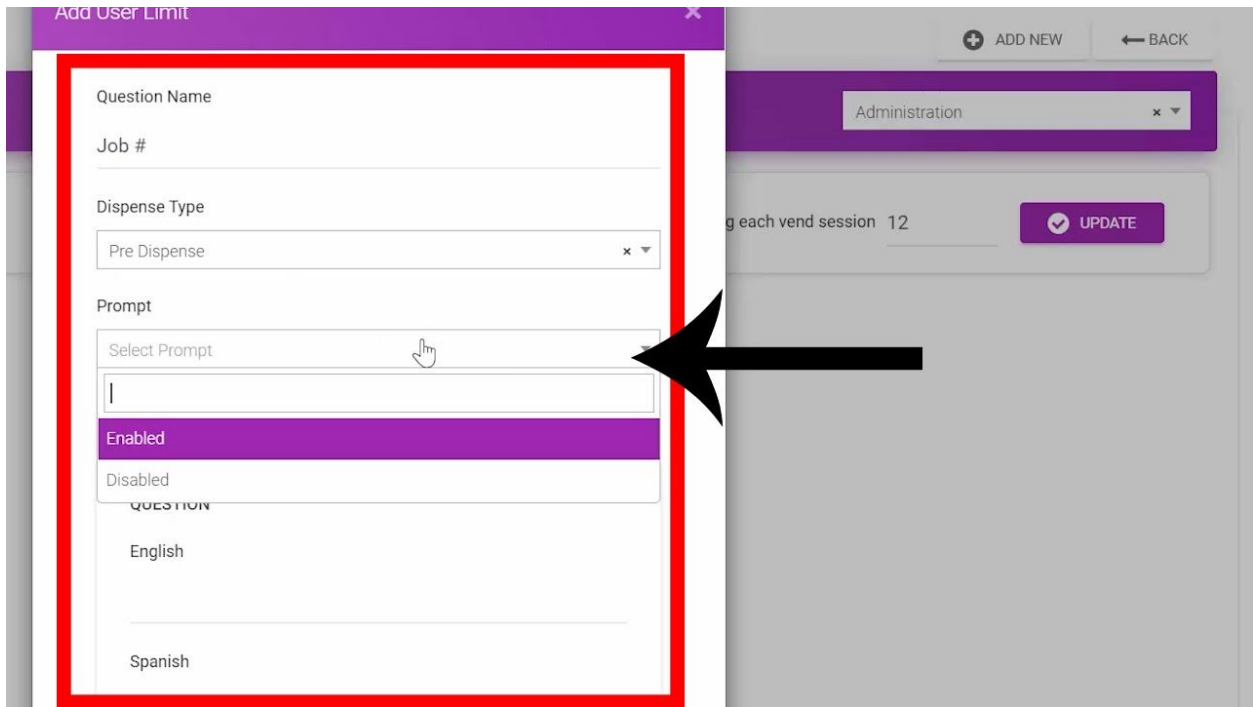
3. Type in the Question Name, Dispense Type and Prompt.
   a. If you choose a Predefined answer, users can ONLY input answers stated here.
4. When complete select ADD User Limit.
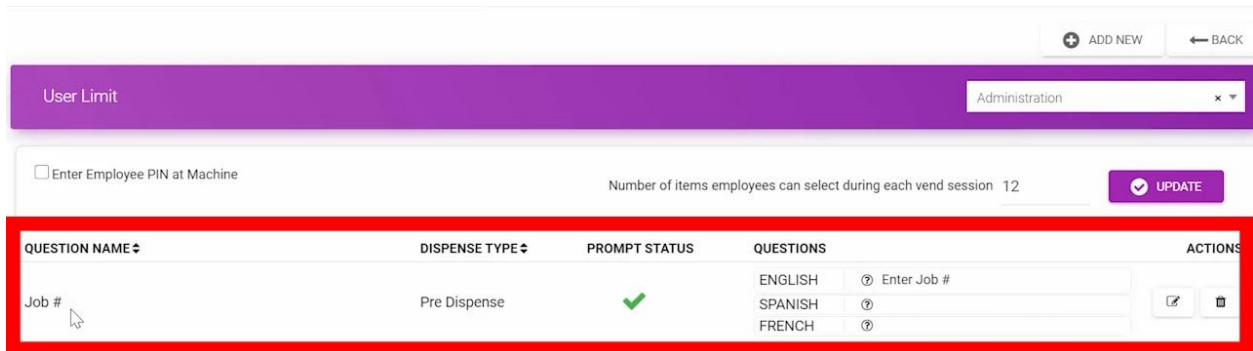
5. This new User Limit will now appear on the department's User Limits page.

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

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

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

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	☐ SELECT ALL
n	31			☐
	15			☐
spoon	33			☐
	11			☐
	17			☐
agerson	32			☐
hompson	35			☐
s	27			☐
hite	16			☐
	21			☐

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

Here it will pull all of your active products. You can select restrictions based on these products.
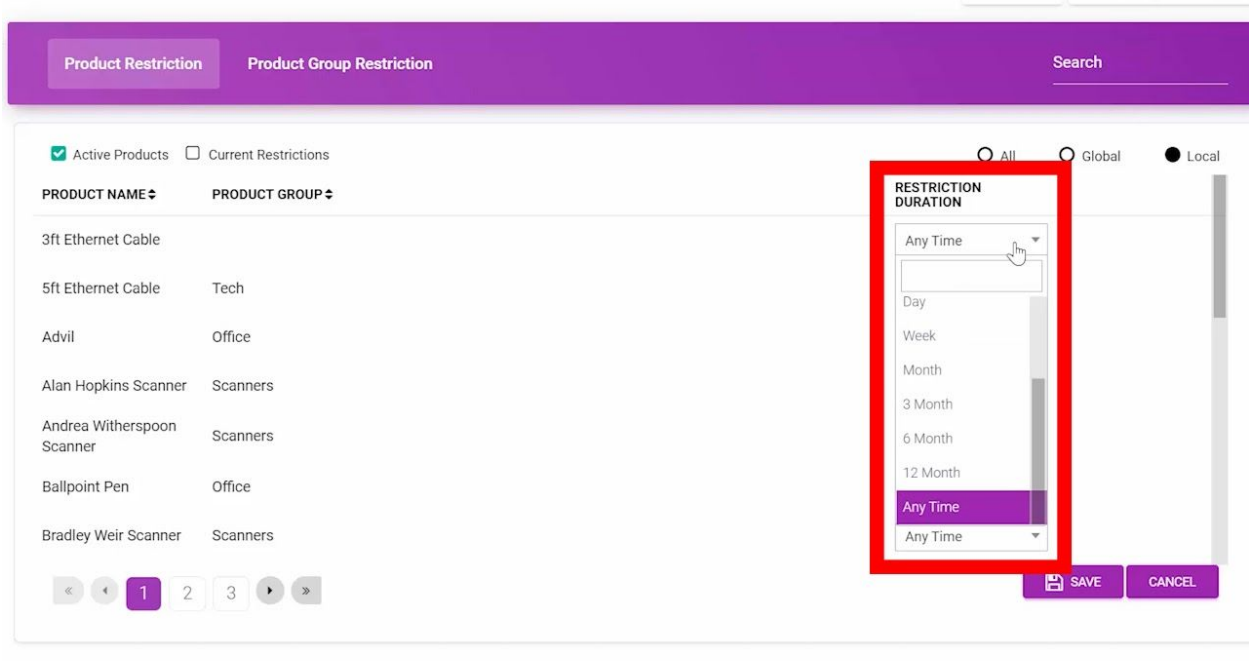
The Restriction Duration is set in this column, Currently this department can dispense any quantity of these products at any time. Use the drop down menu to adjust duration.
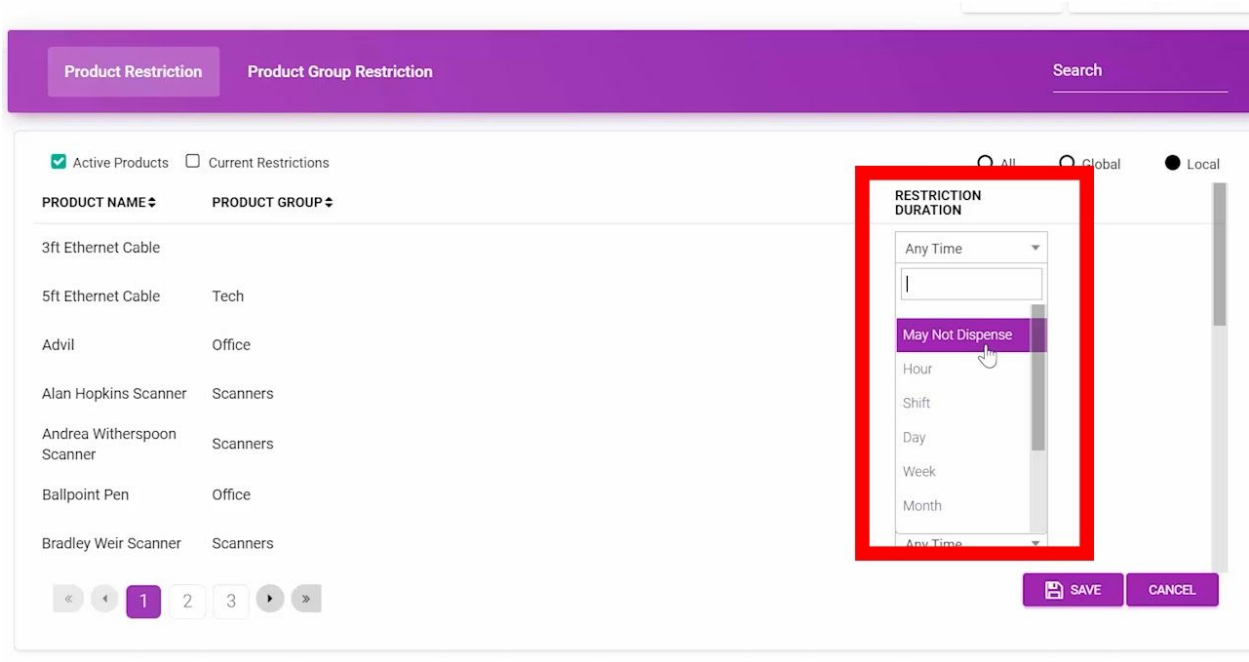
Selecting May Not Dispense will decline employees in this department from accessing the certain product.

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

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.

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

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

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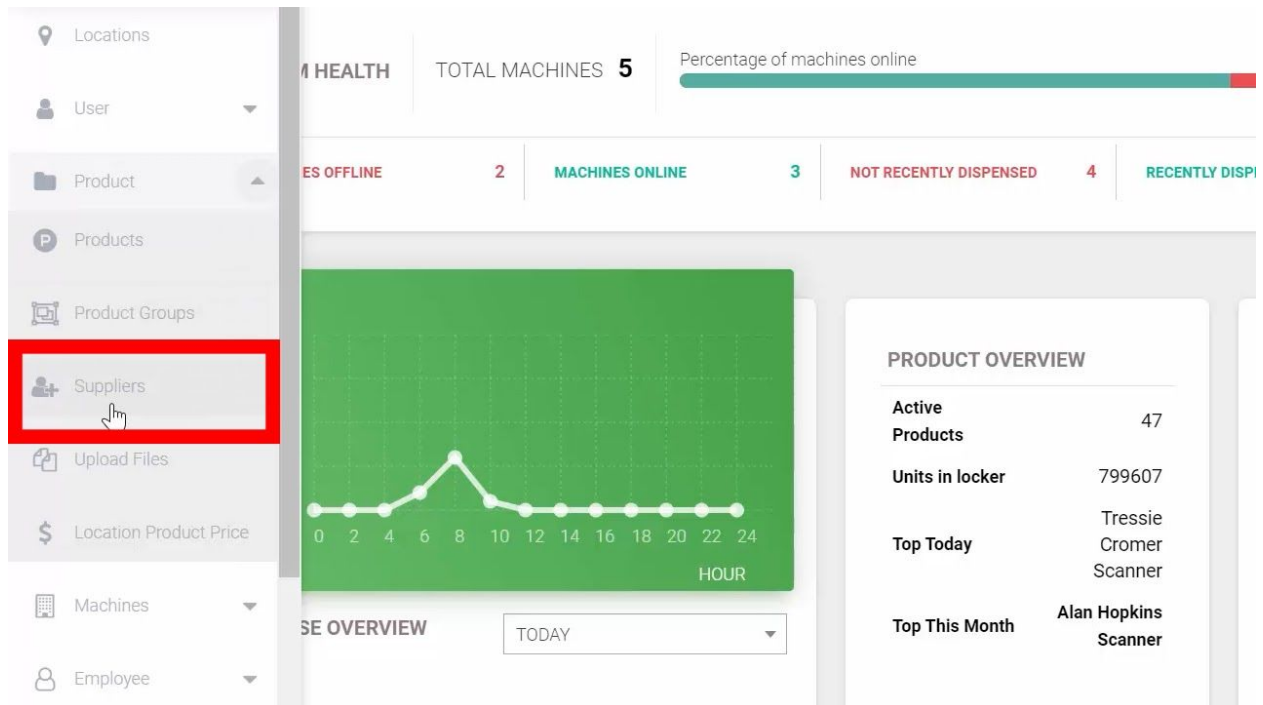
The Suppliers page can be found under Products on the menu tab.

1. Click here to add a new supplier.
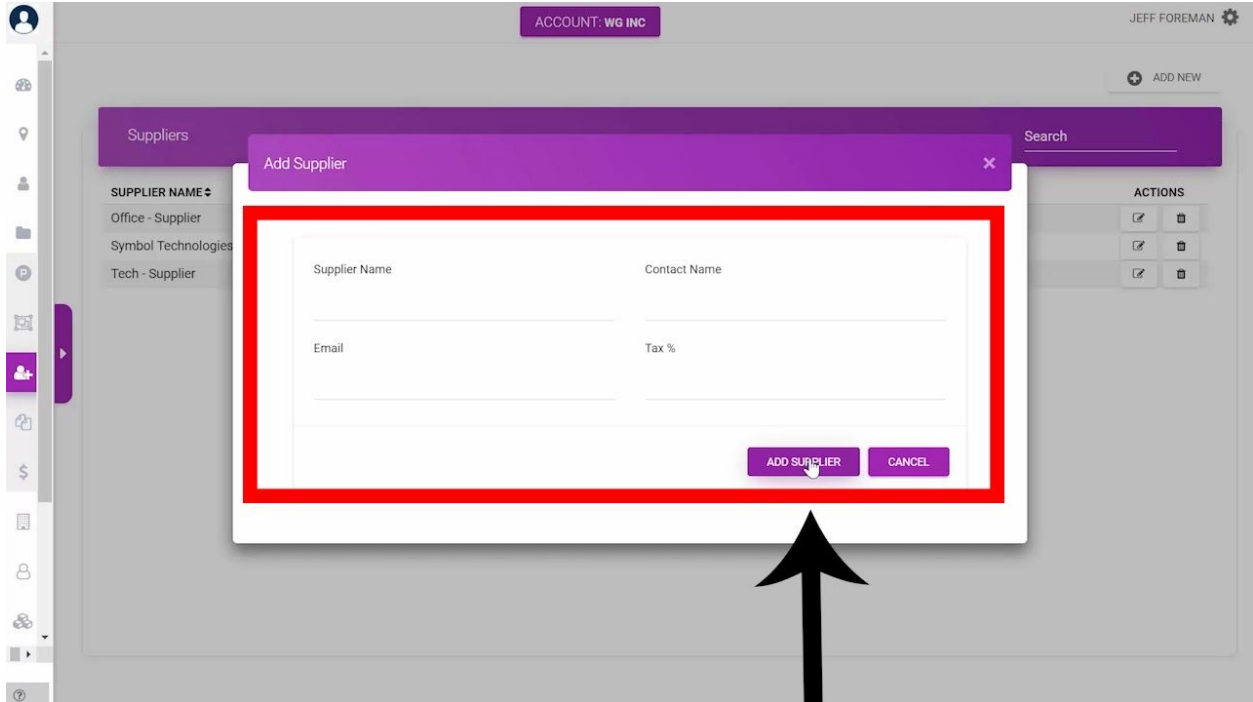
2. Here you can add all the Supplier's information.
3. Hit Add Supplier when complete.
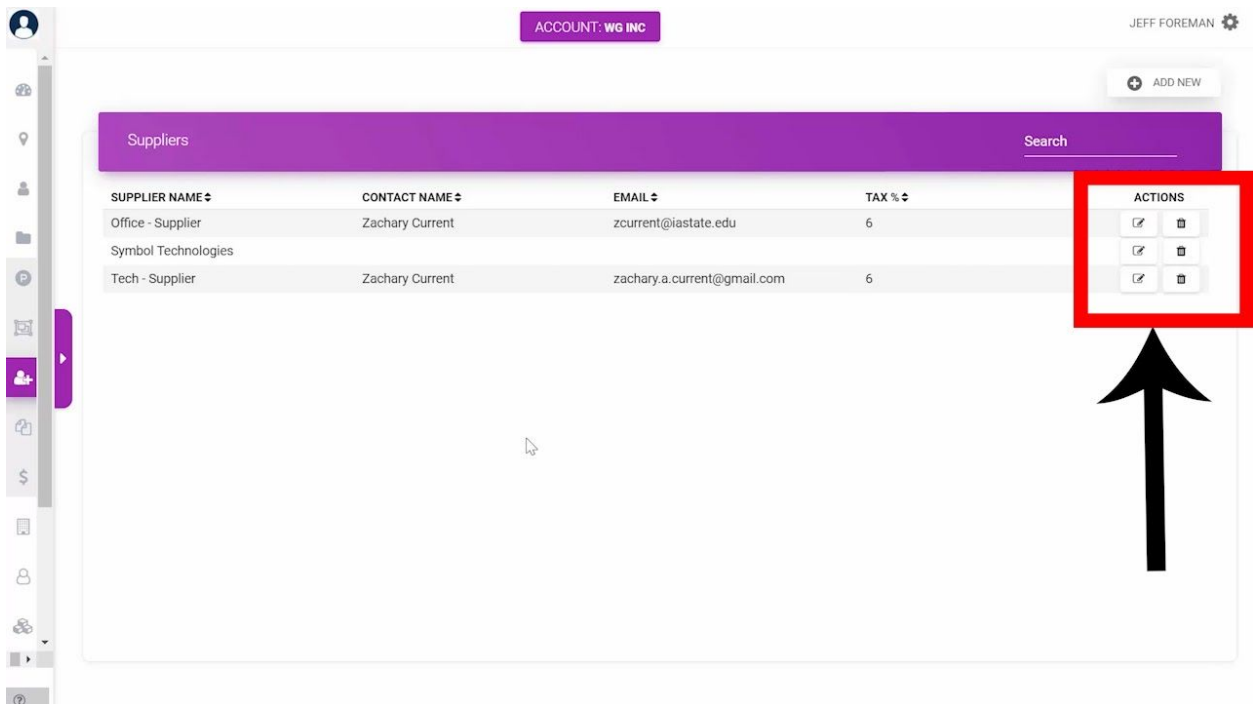
- The Supplier will be added to this page where they can be edited and deleted here on the right.
- Suppliers are tied to products so when you are running a Purchase Order, you can run it based on Suppliers.

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

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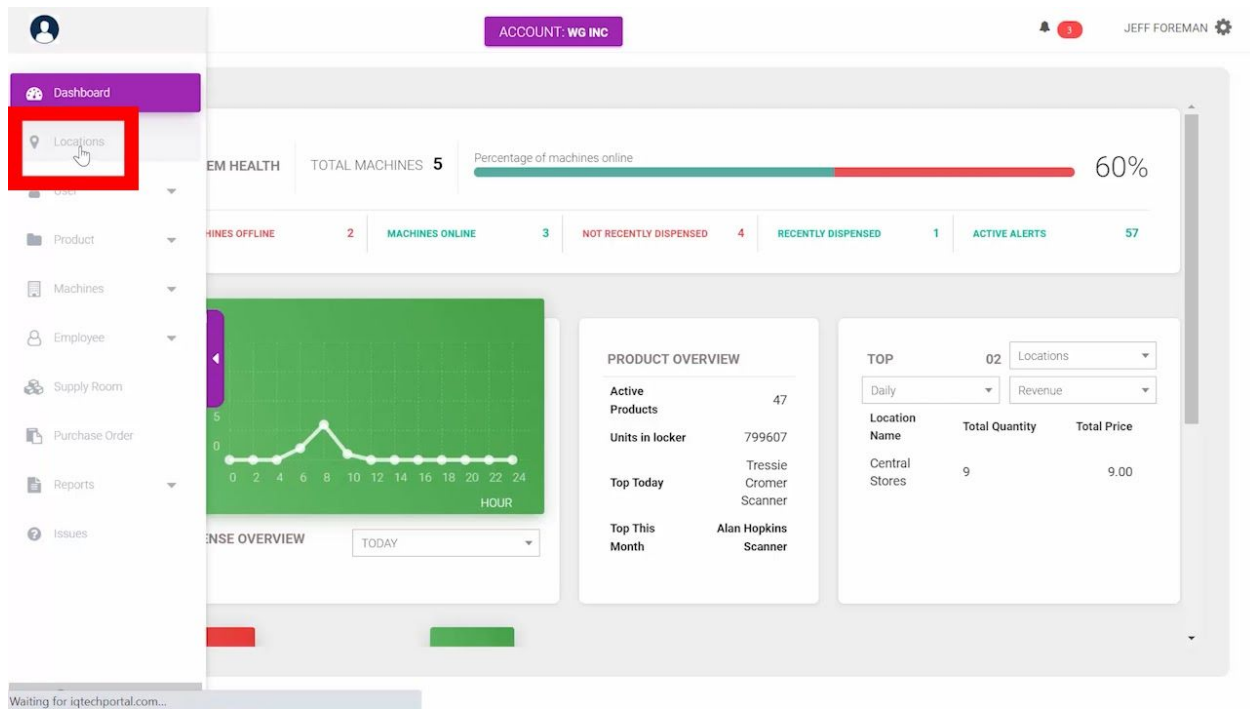
1. Find locations at the top bar on the left.
   a. Locations are where your machines are tied to within the IQ Tech Software.

⊕ ADD NEW

Search

	TIMEZONE ⇕	ADDRESS ⇕	ACTIONS
	(UTC-06:00) Central Time (US & Canada)	8040 University Blvd , Clive, Iowa, 50325	✎ 🗑
	(UTC-06:00) Central Time (US & Canada)	8040 University Blvd , Clive, Iowa, 50325	✎ 🗑
	(UTC-06:00) Central Time (US & Canada)	8040 University Blvd , Clive, Iowa, 50325	✎ 🗑
	(UTC-06:00) Central Time (US & Canada)	8040 University Blvd , Clive, Iowa, 50325	✎ 🗑
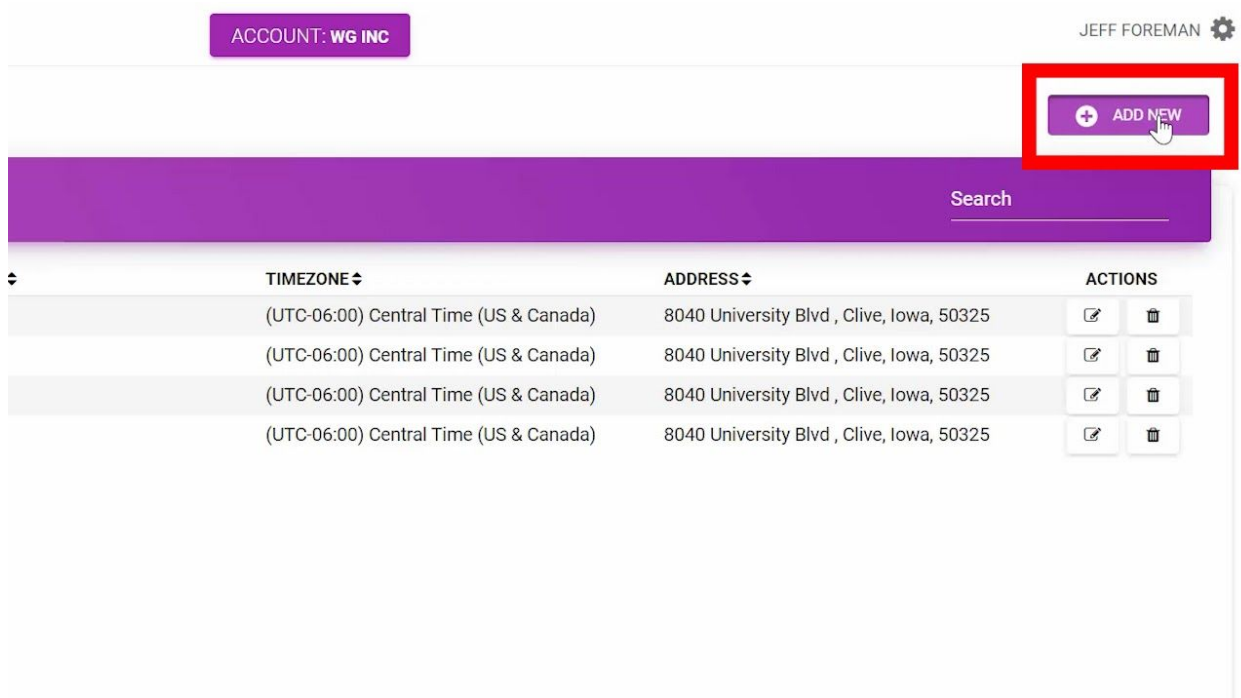
2. To add a new location to place a machine select ADD NEW.

ACCOUNT: **WG INC**

JEFF FOREMAN ⚙

Add Location ✕

⊕ ADD NEW

Locations

Search

LOCATION NAME ⇕				ACTIONS
Central Stores			50325	✎ 🗑
Main Lobby			50325	✎ 🗑
Model Shop			50325	✎ 🗑
Tech Alcove			50325	✎ 🗑

Location Name

ProxCardMask

Time Zone

Select Time Zone ▾

Address 1

Address 2

City

State

ZIP

Select State ▾

ADD LOCATION CANCEL
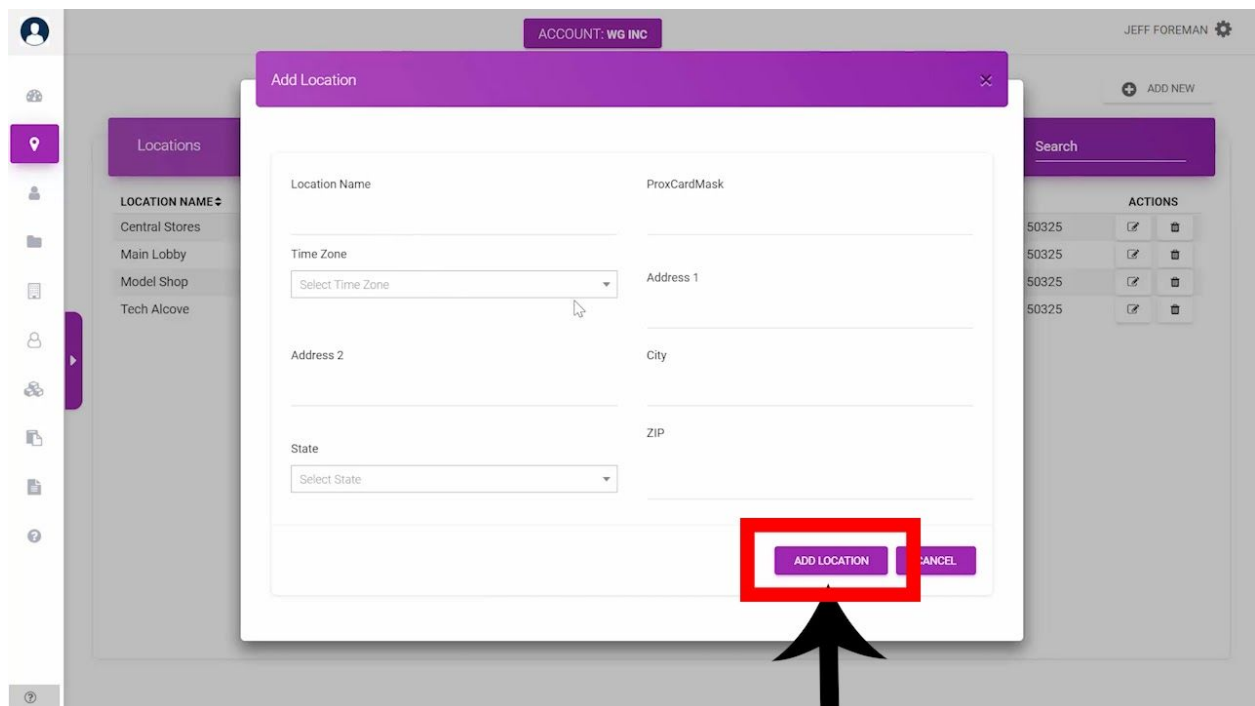
3. Include necessary location information here.
4. Then click ADD LOCATION.

- 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.

    a. The user should select "Purchase Order" on the left side window.

    b. 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.

    c. Input the Quantities that are desired for each product and select "Ok".

    d. Adjustments to the quantities can still be made.

    e. 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