

beginner

# **SOFTWARE USER MANUAL**



INVENTORY TRACKING SOFTWARE AND  
INTELLIGENT DISPENSING EQUIPMENT



14636 NE 95th Street  
Redmond, WA 98052

support

(425)454-3264  
[help@vendnovation.com](mailto:help@vendnovation.com)

sales

(425)372-7261  
[sales@vendnovation.com](mailto:sales@vendnovation.com)

website

[www.vendnovation.com](http://www.vendnovation.com)

## **TOOLS ENVIRONMENT BEGINNER USER MANUAL**

This manual is created and developed by VendNovation LLC.

Information contained in this document is considered to be of a highly confidential and proprietary nature to VendNovation LLC and may not be shared with any party other than its intended recipient



# table of contents

## 1. GETTING STARTED

1

## 2. ADDING PRODUCTS

5

## 3. ADDING DISPENSING UNIT USERS

17

## 4. ASSIGNING

33

## 5. STATUS CHECKING

61

## 6. REMOVING

79



section 1 of 6:

# GETTING STARTED

1

signing in

②

end user license agreement

③

changing your password

④

The first thing to do is open your browser to our website:  
<https://tool.vendnovation.com/>

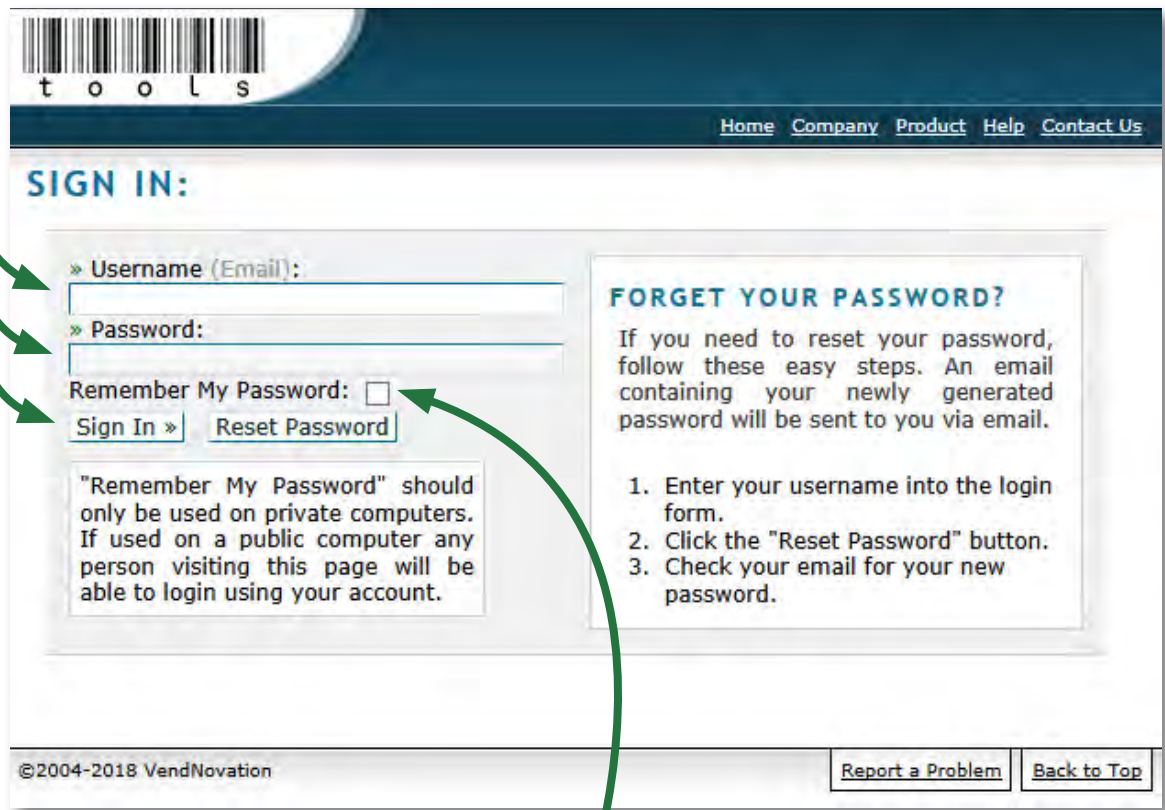


# GETTING STARTED

## signing in

When your user identity is created, you receive an email with your temporary password. Your username is the email address at which you received your password.

FILL IN THE CELLS,  
THEN CLICK "SIGN IN"!



The screenshot shows the 'SIGN IN' page of the VendNovation website. At the top, there is a barcode and the word 'tools'. A navigation bar contains links for Home, Company, Product, Help, and Contact Us. The main heading is 'SIGN IN:'. Below this, there are two input fields: 'Username (Email):' and 'Password:'. To the right of these fields is a 'FORGET YOUR PASSWORD?' section with instructions and a three-step list. Below the input fields is a 'Remember My Password:' checkbox, which is currently checked. Below the checkbox are two buttons: 'Sign In »' and 'Reset Password'. A warning box below the buttons states: '"Remember My Password" should only be used on private computers. If used on a public computer any person visiting this page will be able to login using your account.' At the bottom of the page, there is a copyright notice '©2004-2018 VendNovation' and two links: 'Report a Problem' and 'Back to Top'. Green arrows point from the text 'FILL IN THE CELLS, THEN CLICK "SIGN IN"!'" to the 'Username (Email):' field, the 'Password:' field, and the 'Remember My Password:' checkbox. Another green arrow points from the text 'UNCHECK IF CHECKED! (IF IT IS YOUR FIRST SIGN IN)' to the 'Remember My Password:' checkbox.

» Username (Email):  
» Password:  
Remember My Password: ☒  
[Sign In »](#) [Reset Password](#)

"Remember My Password" should only be used on private computers. If used on a public computer any person visiting this page will be able to login using your account.

**FORGET YOUR PASSWORD?**  
If you need to reset your password, follow these easy steps. An email containing your newly generated password will be sent to you via email.

1. Enter your username into the login form.
2. Click the "Reset Password" button.
3. Check your email for your new password.

©2004-2018 VendNovation [Report a Problem](#) [Back to Top](#)

UNCHECK IF CHECKED!  
(IF IT IS YOUR FIRST SIGN IN)

# GETTING STARTED

## end user license agreement

Please read and agree to the terms of our End User License Agreement.

tools

Home Company Product Help Contact Us

### END USER LICENSE AGREEMENT (EULA)

Please read this license agreement ("License") carefully before using the VendNovation Vending Control Website in whole or in part, provided herewith, including without limitation, any extensions, documentation, or sample files. If you do not agree with the License, THEN DO NOT USE OR COMPLETE INSTALLATION OF ANY PART OF THE WEBSITE. BY USING ANY PART OF THE WEBSITE, YOU ARE CONFIRMING YOUR ACCEPTANCE OF THE WEBSITE AND AGREEING TO BECOME BOUND BY THE TERMS OF THIS LICENSE. IF YOU DO NOT AGREE TO BE BOUND BY THESE TERMS, THEN DO NOT USE THE WEBSITE IN ANY WAY. THIS LICENSE CONTAINS THE COMPLETE AGREEMENT BETWEEN THE PARTIES WITH RESPECT TO THE SUBJECT MATTER HEREOF, AND SUPERCEDES ALL PRIOR AND CONTEMPORANEOUS AGREEMENTS OR UNDERSTANDINGS, WHETHER ORAL OR WRITTEN, AS WELL AS ANY SUBSEQUENT VENDNOVATION CLICK-THROUGH AGREEMENTS PROVIDED WITH THE WEBSITE HEREWITH.

#### SOFTWARE LICENSE AGREEMENT

License

1. Under this Software License Agreement (the "Agreement"), VendNovation LLC (the "Vendor") grants to the user (the "Licensee") a non-exclusive and non-transferable license (the "License") to use VendNovation Vending Control Website (the "Software").
2. "Software" includes the executable computer programs and any related printed, electronic and online documentation and any other files that may accompany the product.
3. Title, copyright, intellectual property rights and distribution rights of the Software remain exclusively with the Vendor. Intellectual property rights include the look and feel of the Software. This Agreement constitutes a license for use only and is not in any way a transfer of ownership rights to the Software.
4. The rights and obligations of this Agreement are personal rights granted to the Licensee only. The Licensee may not transfer or assign any of the rights or obligations granted under this Agreement to any other person or legal entity. The Licensee may not make available the Software for use by one or more third parties.
5. The Software may not be modified, reverse-engineered, or de-compiled in any manner through current or future available technologies.
6. Failure to comply with any of the terms under the License section will be considered a material breach of this Agreement.

#### Notices

27. All notices to the Vendor under this Agreement are to be provided at the following address:  
VendNovation LLC  
14636 NE 95th Street, Redmond, WA 98052

☐ I have read the above EULA and agree to abide by its terms. [Continue](#) [Cancel](#)

©2004-2018 VendNovation [Report a Problem](#) [Back to Top](#)

SCROLL DOWN!

CHECK THE BOX!

THEN, CLICK "CONTINUE"



# GETTING STARTED

## changing your password

We recommend changing your password from the temporary password. Afterward, you might want to: 1.) log out, 2.) check the "Remember My Password" box, and 3.) sign in again.

FOLLOW THE "CHANGE PASSWORD" LINK

The screenshot shows the VendNovation user interface. At the top, there's a header with a barcode and the text 't o o l s'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. A secondary navigation bar contains: Report, Manage, Machines, Products, and View. The main content area starts with a 'WELCOME - YOUR NAME' message. To the right, there's a box with 'Change Password' and 'Log Out' links. Below this is a 'QUICK STATUS' section with a message: 'Click blank tables to load additional data.' The main content area is divided into three sections: 'System Health' (a table with 6 rows), 'Dispense Overview' (a table with 6 rows), and 'Product Overview' (a table with 6 rows). At the bottom left, there's a copyright notice: '©2004-2018 VendNovation'. A 'Change Your Password' modal form is open in the bottom right corner, containing three input fields for 'Old Password', 'New Password', and 'Confirm Password', and a 'Change Password' button. A green arrow points from the 'Change Password' link in the top right to the modal form.

System Health	
Total Machines	0
Machines Offline	0
Machines Online	0
No Recent Dispense	0
Low Product	0
Active Alerts	0

Dispense Overview	
Today	
Yesterday	
This Month	
Last Month	
Total Dispenses	
Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Slots	
Top Today	
Top This Month	

**Change Your Password** Close  
Old Password:   
New Password:   
Confirm Password:   
Change Password

THEN, FILL IN THE CELLS AND  
CLICK "CHANGE PASSWORD"!



section 2 of 6:

# ADDING PRODUCTS

5

by spreadsheet

6

as individuals

13

"Products" refers to all items you wish to track with VendNovation software and equipment. In other words, "Products" are anything you put inside.





# ADDING PRODUCTS

by spreadsheet

All items to be tracked, stored, or dispensed need to be registered in your organization as "Products". This method of adding products uses a .CSV file to upload a batch.

CLICK ON THE "PRODUCTS"  
DROPPDOWN MENU!

The screenshot shows the VendNovation web application interface. At the top, there is a header with a barcode and the text "t o o l s". To the right, it says "YOUR ORGANIZATION". Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. A dropdown menu is open under the "Products" link, showing options: Manage Products, Site Pricing, Purchase Orders, and Search and Replace. A green arrow points from the text "CLICK ON THE 'PRODUCTS' DROPPDOWN MENU!" to the "Products" dropdown. Another green arrow points from the text "THEN, CLICK ON 'MANAGE PRODUCTS'!" to the "Manage Products" option in the dropdown. The main content area includes a "WELCOME - YOUR NAME" message, a "QUICK STATUS" section with a note "Click blank tables to load additional data.", and several data tables: "System Health", "Dispense Overview", and "Product Overview".

System Health	
Total Machines	0
Machines Offline	0
Machines Online	0
No Recent Dispense	0
Low Product	0
Active Alerts	0

Dispense Overview	
Today	
Yesterday	
This Month	
Last Month	
Total Dispenses	
Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sinks	
Top Today	
Top This Month	

©2004-2018 VendNovation

THEN, CLICK ON  
"MANAGE PRODUCTS"!



# ADDING PRODUCTS

by spreadsheet

Navigate to the product import page.

CLICK ON THE "IMPORT PRODUCTS"  
LINK!

The screenshot shows the 'MANAGE PRODUCTS' page in the VendNovation system. The page has a dark blue header with 'YOUR ORGANIZATION' and a heart icon with '0'. Below the header is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main content area is titled 'MANAGE PRODUCTS' and includes a search bar with the text 'Find a Product, Group, or Supplier:'. Below the search bar is a text box with instructions: 'Begin by Searching Above. By default we locate Products based on Item Number, Suppliers and Products Groups based on Name. To see all Products, type **products**. To see all Product Groups, type **groups**. To see all Suppliers, type **suppliers**.' To the right of the search bar is an 'Actions' menu with the following links: Search, Create Product, Create Group, Create Supplier, Site Pricing, Group Assignment, Supplier Assignment, Batch Update Product Permissions, Import Products, Import Site Pricing, Export Product List, Export Locker Menu, Restore Deleted Products, and About Products. A green arrow points from the text 'CLICK ON THE "IMPORT PRODUCTS" LINK!' to the 'Import Products' link in the 'Actions' menu.

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MANAGE PRODUCTS

Find a Product, Group, or Supplier:

Search Filter By...

Begin by Searching Above. By default we locate Products based on Item Number, Suppliers and Products Groups based on Name. To see all Products, type **products**. To see all Product Groups, type **groups**. To see all Suppliers, type **suppliers**.

Actions

- Search
- Create Product
- Create Group
- Create Supplier
- Site Pricing
- Group Assignment
- Supplier Assignment
- Batch Update Product Permissions
- Import Products
- Import Site Pricing
- Export Product List
- Export Locker Menu
- Restore Deleted Products
- About Products

©2004-2018 VendNovation

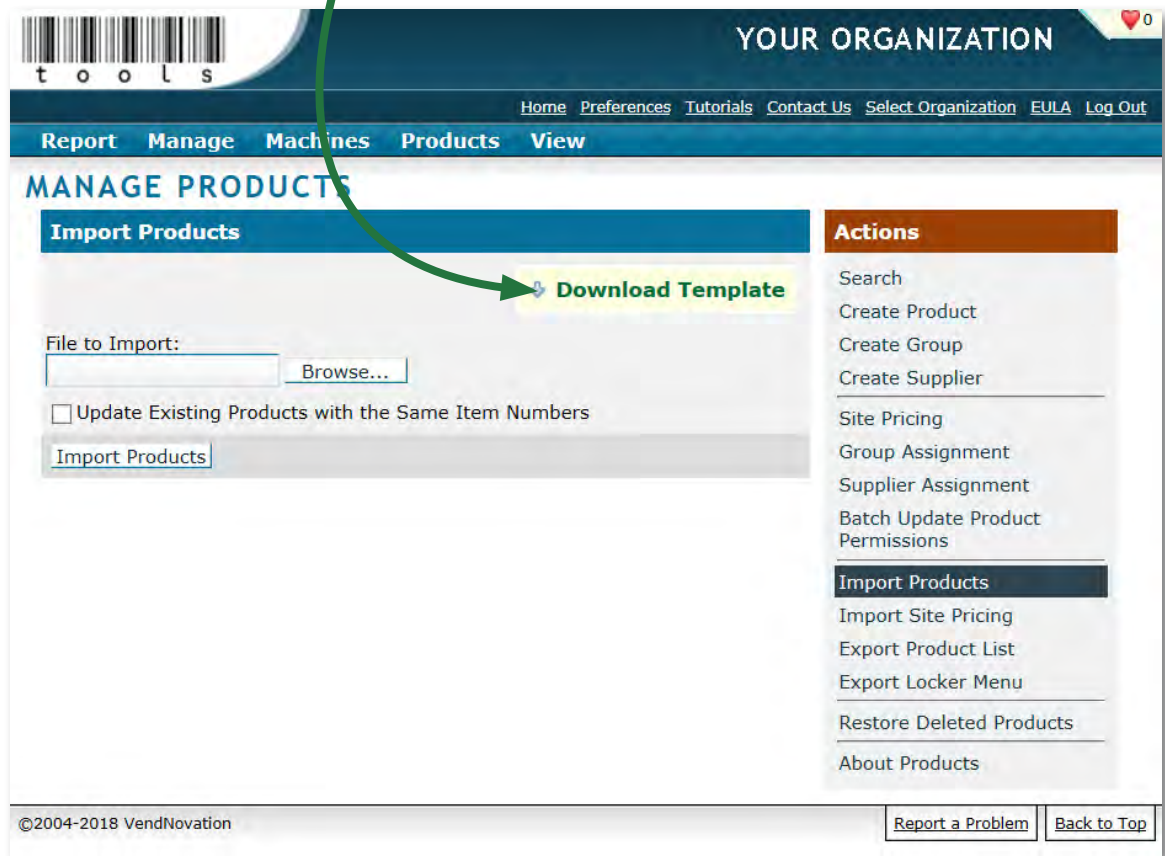
Report a Problem Back to Top

# ADDING PRODUCTS

by spreadsheet

You can download a template .CSV file from this page. When you have transferred all of the appropriate information to the .CSV spreadsheet, you will upload it from here.

FOLLOW THE "DOWNLOAD TEMPLATE" LINK!



The screenshot shows the 'MANAGE PRODUCTS' page in the VendNovation system. At the top, there's a header with 'YOUR ORGANIZATION' and a navigation bar with links like Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a sub-header with 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main section is titled 'MANAGE PRODUCTS' and contains an 'Import Products' tab. Under this tab, there's a 'File to Import:' section with a text input field and a 'Browse...' button. Below that is a checkbox labeled 'Update Existing Products with the Same Item Numbers' and an 'Import Products' button. To the right of the 'Import Products' section is an 'Actions' menu with various options: Search, Create Product, Create Group, Create Supplier, Site Pricing, Group Assignment, Supplier Assignment, Batch Update Product Permissions, Import Products (highlighted), Import Site Pricing, Export Product List, Export Locker Menu, Restore Deleted Products, and About Products. A green arrow points from the text 'FOLLOW THE "DOWNLOAD TEMPLATE" LINK!' to the 'Download Template' link in the 'Import Products' section.

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MANAGE PRODUCTS

Import Products

File to Import:

Browse...

☐ Update Existing Products with the Same Item Numbers

Import Products

Download Template

Actions

- Search
- Create Product
- Create Group
- Create Supplier
- Site Pricing
- Group Assignment
- Supplier Assignment
- Batch Update Product Permissions
- Import Products
- Import Site Pricing
- Export Product List
- Export Locker Menu
- Restore Deleted Products
- About Products

©2004-2018 VendNovation

Report a Problem Back to Top

# ADDING PRODUCTS

by spreadsheet

The image shows an Excel spreadsheet titled "products template" with the following columns and handwritten instructions:

	A	B	C	D	E	F	G	H	I
	Manufacturer #	Manufacturer	Item #	Description	Package Qty	Price	Cost	Product Group	Supplier
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									

Handwritten instructions for each column:

- Column A: IF UNKNOWN, CAN BE THE SAME AS THE ITEM NUMBER
- Column B: IF UNKNOWN, CAN BE THE NAME OF YOUR ORGANIZATION
- Column C: PRIMARY TRACKING NUMBER
- Column D: WHATEVER MAKES IT EASIEST FOR YOU TO IDENTIFY
- Column E: IN MOST CASES, THIS IS "1"
- Column F: CAN BE "0" (ZERO)
- Column G: CAN BE "0" (ZERO)
- Column H: RECOMMENDED DEFAULT "DEFAULT GROUP"
- Column I: CAN BE BLANK

CANNOT BE BLANK

# ADDING PRODUCTS

by spreadsheet

Return to the product import page, and upload your .CSV file.

t o o l s

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MANAGE PRODUCTS

Import Products

Download Template

File to Import:

Browse...

☐ Update Existing Products with the Same Item Numbers

Import Products

Actions

- Search
- Create Product
- Create Group
- Create Supplier
- Site Pricing
- Group Assignment
- Supplier Assignment
- Batch Update Product Permissions
- Import Products
- Import Site Pricing
- Export Product List
- Export Locker Menu
- Restore Deleted Products
- About Products

©2004-2018 VendNovation

Report a Problem Back to Top

10

FIRST, CLICK THE  
"BROWSE" BUTTON, AND  
LOCATE YOUR .CSV FILE!

THEN, CLICK THE  
"IMPORT PRODUCTS" BUTTON!



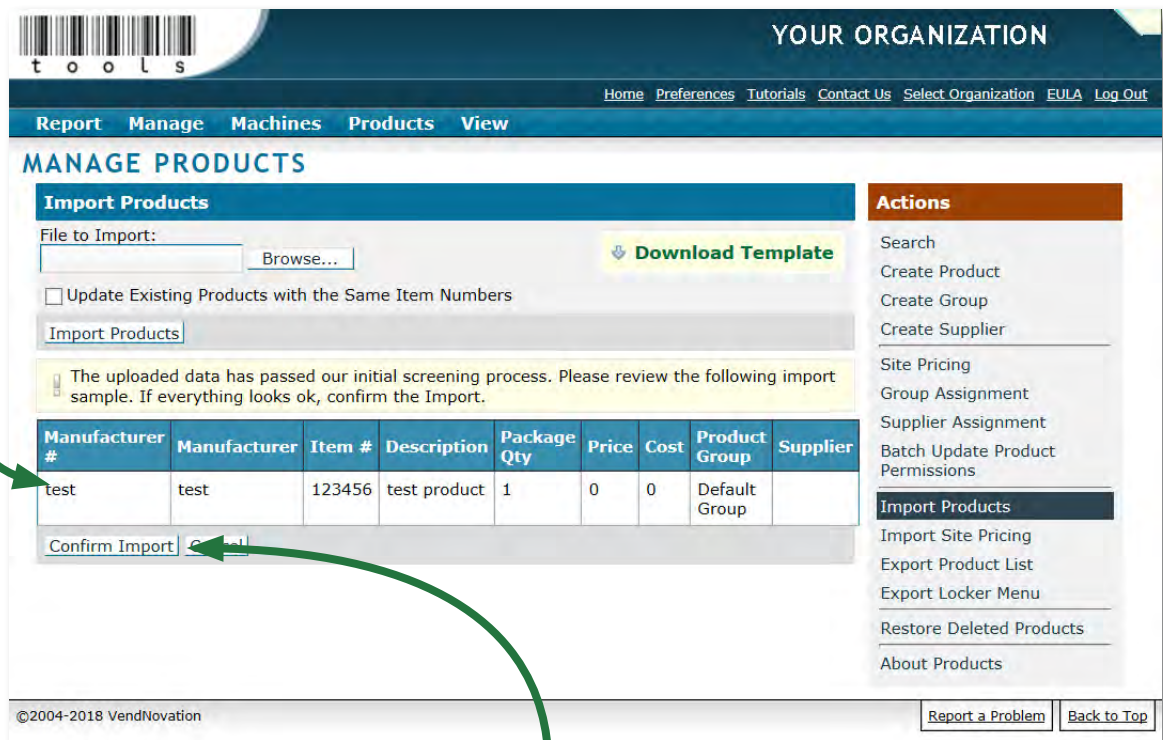


# ADDING PRODUCTS

by spreadsheet

Before uploading, you will be prompted to confirm your entries.

DOUBLE CHECK YOUR ENTRIES!



The screenshot shows the 'MANAGE PRODUCTS' interface with the 'Import Products' section active. A message states: 'The uploaded data has passed our initial screening process. Please review the following import sample. If everything looks ok, confirm the Import.' Below this is a table with the following data:

Manufacturer #	Manufacturer	Item #	Description	Package Qty	Price	Cost	Product Group	Supplier
test	test	123456	test product	1	0	0	Default Group	

At the bottom of the table is a 'Confirm Import' button. A green arrow points from the text 'DOUBLE CHECK YOUR ENTRIES!' to this button. Another green arrow points from the text 'THEN, CLICK THE "CONFIRM IMPORT" BUTTON TO FINALIZE THE UPLOAD.' to the same button.

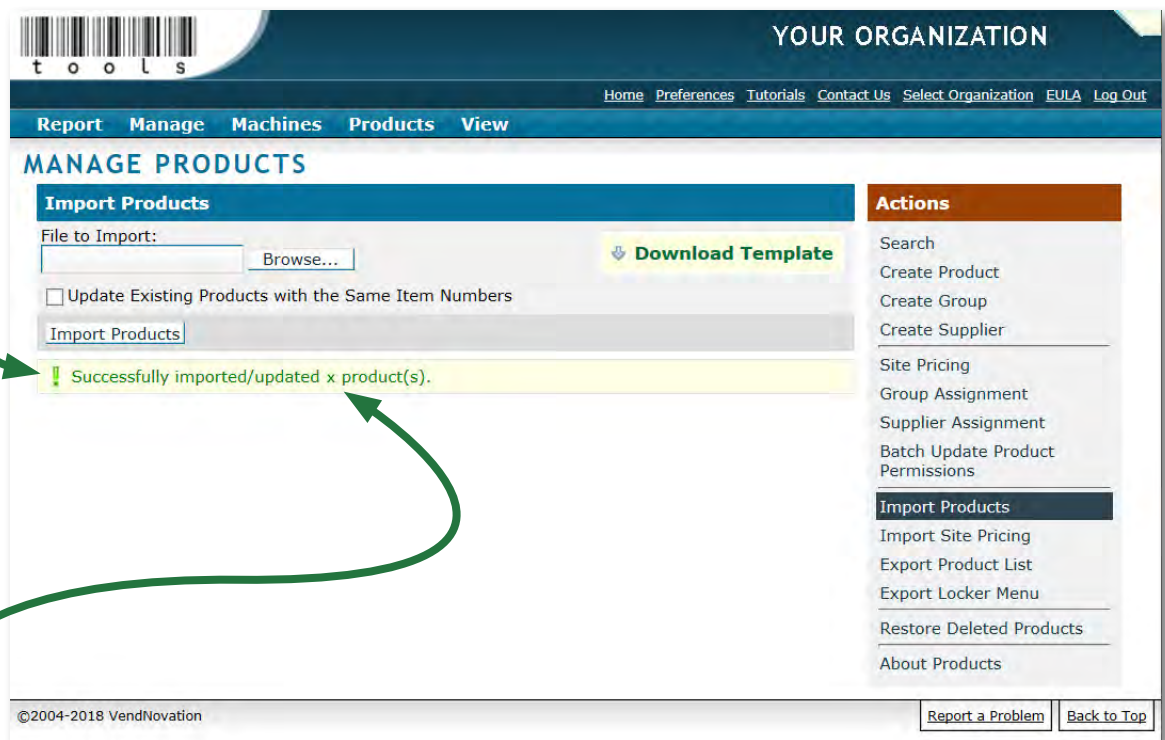
THEN, CLICK THE "CONFIRM IMPORT" BUTTON TO FINALIZE THE UPLOAD.

# ADDING PRODUCTS

by spreadsheet

After uploading, you will return to the "Manage Products" page.

THIS MESSAGE CONFIRMS YOUR UPLOAD!



The screenshot shows the 'Manage Products' interface. At the top, there's a header with 'YOUR ORGANIZATION' and navigation links. Below that, a menu bar includes 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main section is titled 'MANAGE PRODUCTS'. On the left, the 'Import Products' section has a 'File to Import:' field with a 'Browse...' button and a 'Download Template' button. Below this is a checkbox for 'Update Existing Products with the Same Item Numbers' and an 'Import Products' button. A yellow confirmation message states: 'Successfully imported/updated x product(s)'. On the right, an 'Actions' menu lists various options like 'Search', 'Create Product', 'Create Group', 'Create Supplier', 'Site Pricing', 'Group Assignment', 'Supplier Assignment', 'Batch Update Product Permissions', 'Import Products', 'Import Site Pricing', 'Export Product List', 'Export Locker Menu', 'Restore Deleted Products', and 'About Products'. At the bottom, there's a footer with copyright information and links for 'Report a Problem' and 'Back to Top'.

X = NUMBER OF PRODUCTS!

**NOTE:** WHEN STORING EQUIPMENT IN A LOCKER, BE SURE TO EDIT EACH PRODUCT INDIVIDUALLY TO CHECK THE "RETURNABLE" CHECKBOX!



# ADDING PRODUCTS

as individuals

All items to be tracked, stored, or dispensed need to be registered in your organization as "Products". From your home page, navigate to the "Manage Products" page.

CLICK ON THE "PRODUCTS" DROPPDOWN MENU!

The screenshot displays the VendNovation web application interface. At the top, there is a header with a barcode and the text 't o o l s'. To the right, it says 'YOUR ORGANIZATION'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. A dropdown menu is open under the 'Products' link, showing options: Manage Products, Site Pricing, Purchase Orders, and Search and Replace. A green arrow points from the text 'CLICK ON THE "PRODUCTS" DROPPDOWN MENU!' to the 'Products' dropdown. Another green arrow points from the text 'THEN, CLICK ON "MANAGE PRODUCTS"! to the 'Manage Products' option in the dropdown.

WELCOME - YOUR NAME

QUICK STATUS

Click blank tables to load additional data.

System Health		Dispense Overview	
Total Machines	0	Today	
Machines Offline	0	Yesterday	
Machines Online	0	This Month	
No Recent Dispense	0	Last Month	
Low Product	0	Total Dispenses	
Active Alerts	0	Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sinks	
Top Today	
Top This Month	

©2004-2018 VendNovation

THEN, CLICK ON "MANAGE PRODUCTS"!



# ADDING PRODUCTS

as individuals

Using the panel on the right, create a new product.

CLICK ON THE "CREATE PRODUCT" LINK!

The screenshot shows the 'MANAGE PRODUCTS' interface. At the top, there's a header with 'YOUR ORGANIZATION' and a heart icon with '0'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, Log Out. The main navigation bar includes Report, Manage, Machines, Products, and View. The 'MANAGE PRODUCTS' section has a search bar with 'Find a Product, Group, or Supplier:' and a 'Filter By...' dropdown. Below the search bar, there's a text box explaining the search process: 'Begin by Searching Above. By default we locate Products based on Item Number, Suppliers and Products Groups based on Name. To see all Products, type **products**. To see all Product Groups, type **groups**. To see all Suppliers, type **suppliers**.' On the right, there's an 'Actions' panel with a list of links: Search, Create Product, Create Group, Create Supplier, Site Pricing, Group Assignment, Supplier Assignment, Batch Update Product Permissions, Import Products, Import Site Pricing, Export Product List, Export Locker Menu, Restore Deleted Products, and About Products. A green arrow points from the text 'CLICK ON THE "CREATE PRODUCT" LINK!' to the 'Create Product' link in the 'Actions' panel.

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MANAGE PRODUCTS

Find a Product, Group, or Supplier:

Search Filter By...

Begin by Searching Above. By default we locate Products based on *Item Number*, Suppliers and Products Groups based on *Name*. To see all Products, type **products**. To see all Product Groups, type **groups**. To see all Suppliers, type **suppliers**.

Actions

- Search
- Create Product
- Create Group
- Create Supplier
- Site Pricing
- Group Assignment
- Supplier Assignment
- Batch Update Product Permissions
- Import Products
- Import Site Pricing
- Export Product List
- Export Locker Menu
- Restore Deleted Products
- About Products

©2004-2018 VendNovation

Report a Problem Back to Top

# ADDING PRODUCTS

as individuals

Navigate to the product list.

IF UNKNOWN, CAN BE THE NAME OF YOUR ORGANIZATION

IF UNKNOWN, CAN BE THE SAME AS THE ITEM NUMBER

PRIMARY TRACKING NUMBER

IN MOST CASES, THIS IS "1"

CAN BE "0" (ZERO)

RECOMMENDED DEFAULT "DEFAULT GROUP"

CANNOT BE BLANK

CAN BE BLANK OR LEFT AS DEFAULT

**NOTE: WHEN STORING EQUIPMENT IN A LOCKER, BE SURE TO CHECK THE "RETURNABLE" CHECKBOX ON EACH PRODUCT!**

WHEN COMPLETE, CLICK THE "SAVE" BUTTON!

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

**MANAGE PRODUCTS**

**Create Product**

Manufacturer Manufacturer Item Number

Item Number Description

Package Quantity Price Per Item (\$) Package: \$0.00

Cost Per Item (\$) Size

Package: \$0.00 Coil

Product Group Product Supplier

Unassigned Unassigned

Custom History Field 1 ☐ Require Dual Validation

Custom History Field 2 ☐ Allow Offline Dispensing

Custom Field 1 ☐ Returnable

Custom Field 2

Barcode/UPC

Cancel Save

©2004-2018 VendNovation Report a Problem Back to Top

# ADDING PRODUCTS

as individuals

You will return to the "Manage Products" page, and the message "Update Successful" will temporarily display to confirm the product upload.

THIS MESSAGE CONFIRMS YOUR UPLOAD!



The screenshot shows the 'Manage Products' interface. At the top, there's a header with 'YOUR ORGANIZATION' and navigation links: Home, Preferences, Tutorials, Contact Us, EULA, Log Out. Below this is a sub-header with 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main section is titled 'MANAGE PRODUCTS' and includes a search bar with the text 'Find a Product, Group, or Supplier:'. A yellow box highlights the 'Update Successful' message. Below the search bar, a table lists products, with the first entry being '123456 test product x1'. A green arrow points from the 'Update Successful' message to the table. To the right of the table is an 'Actions' menu with various options like 'Search', 'Create Product', 'Create Group', 'Create Supplier', 'Site Pricing', 'Group Assignment', 'Supplier Assignment', 'Batch Update Product Permissions', 'Import Products', 'Import Site Pricing', 'Export Product List', 'Export Locker Menu', 'Restore Deleted Products', and 'About Products'. A green arrow points from the 'Products' tab in the sub-header to the table.

Find a Product, Group, or Supplier: **Update Successful**

Search Filter By... ▼

123456 test product x1	137379	Product
------------------------	--------	---------

**"PRODUCTS" WILL CONTINUE TO REGISTER HERE!**

**Actions**

- Search
- Create Product
- Create Group
- Create Supplier
- Site Pricing
- Group Assignment
- Supplier Assignment
- Batch Update Product Permissions
- Import Products
- Import Site Pricing
- Export Product List
- Export Locker Menu
- Restore Deleted Products
- About Products

section 3 of 6:

# ADDING DISPENSING UNIT USERS

by batch

18

one at a time

25

resetting pins

31

"Dispensing Units" refers to all types of equipment able to be used in a VendNovation system, including: lockers, vending machines, and cabinetry.



# ADDING UNIT USERS

by batch

The software refers to all types of users, regardless of hierarchy in your organization, as "employees". This method of adding employees uses a .CSV file to upload a batch of identities.

CLICK ON THE "MANAGE" DROPPDOWN MENU!

The screenshot shows the VendNovation software interface. At the top, there is a header with a barcode and the text 't o o l s'. To the right, it says 'YOUR ORGANIZATION'. Below the header, there is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar has tabs: Report, Manage, Machines, Products, and View. The 'Manage' tab is selected. Below the navigation bar, it says 'WELCOME - YOUR NAME' and 'QUICK STATUS'. There is a yellow box with the text 'Click blank tables to load additional data.' Below this, there are two tables: 'System Health' and 'Dispense Overview'. The 'System Health' table has rows for Total Machines, Machines Offline, Machines Online, No Recent Dispense, Low Product, and Active Alerts, all with a value of 0. The 'Dispense Overview' table has rows for Today, Yesterday, This Month, Last Month, Total Dispenses, and Total Value. Below these tables, there is a 'Product Overview' table with rows for Active SKUs, Units In Lockers, Units In Sites, Top Today, and Top This Month. On the right side of the interface, there is a dropdown menu for 'Manage' with the following options: Accounts, Sites, Users, Alert Routing, Supply Rooms, Employees, Employee Badges, Allocation Codes, Shift Definitions, Restriction Exceptions, and Restriction Check. The 'Employees' option is highlighted. A green arrow points from the 'MANAGE' dropdown menu in the navigation bar to the 'Employees' option in the dropdown menu.

Accounts  
Sites  
Users  
Alert Routing  
Supply Rooms  
Employees  
Employee Badges  
Allocation Codes  
Shift Definitions  
Restriction Exceptions  
Restriction Check

THEN, CLICK ON "EMPLOYEES"!

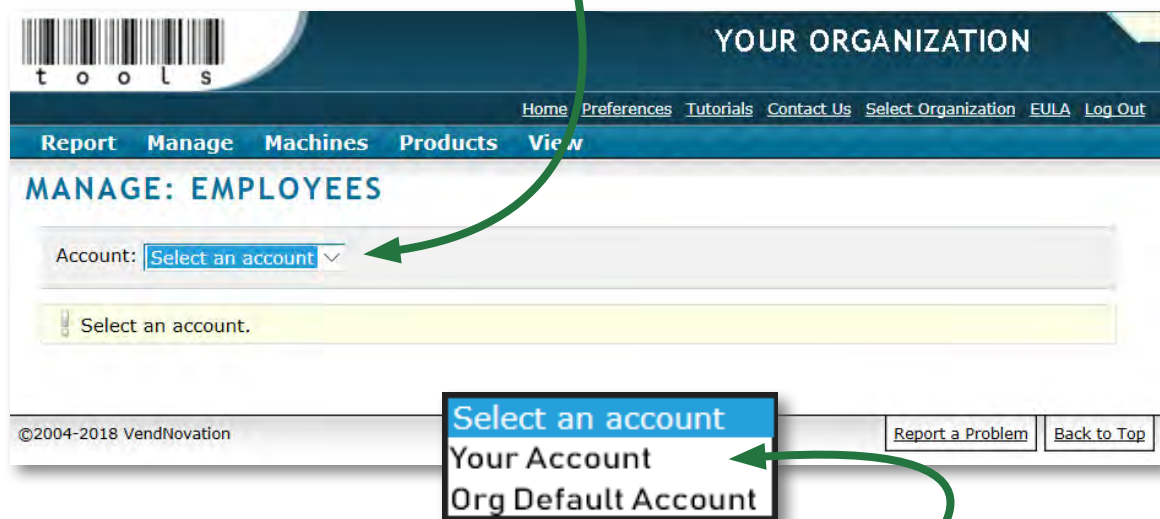


# ADDING UNIT USERS

by batch

Select the appropriate account for the unit you are using.

CLICK ON THE "ACCOUNT"  
DROPPDOWN MENU!



The screenshot shows the 'MANAGE: EMPLOYEES' page in the VendNovation system. At the top, there is a header with a barcode and the text 't o o l s'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main content area has tabs for Report, Manage, Machines, Products, and View. The 'Manage' tab is selected, and the page title is 'MANAGE: EMPLOYEES'. Below the title, there is a form with a label 'Account:' and a dropdown menu. The dropdown menu is open, showing three options: 'Select an account', 'Your Account', and 'Org Default Account'. A green arrow points from the text 'CLICK ON THE "ACCOUNT" DROPPDOWN MENU!' to the dropdown menu. Another green arrow points from the text 'THEN, CLICK ON THE ACCOUNT FOR THE DISPENSING UNIT YOU ARE USING!' to the 'Your Account' option in the dropdown menu. At the bottom of the page, there is a footer with the text '©2004-2018 VendNovation' and two buttons: 'Report a Problem' and 'Back to Top'.

THEN, CLICK ON THE ACCOUNT  
FOR THE DISPENSING UNIT YOU  
ARE USING!



# ADDING UNIT USERS

by batch

Navigate to the employee import page.

CLICK ON THE "IMPORT EMPLOYEES"  
BUTTON!

The screenshot shows the 'Manage Employees' page in the VendNovation system. At the top, there's a 'tools' section with a barcode and a 'YOUR ORGANIZATION' header. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main section is titled 'MANAGE: EMPLOYEES' and includes a 'Select Account:' dropdown menu set to 'Your Account' with an 'Export' button. Below this is a sub-header 'Manage Employees for Arts Department'. The main content area has a search bar, a 'Filter By' dropdown, a 'Search' button, a checkbox for 'Show Only Active Employees', and an 'Import Employees' button. A green arrow points from the text 'CLICK ON THE "IMPORT EMPLOYEES" BUTTON!' to the 'Import Employees' button. At the bottom, there's a footer with '©2004-2018 VendNovation' and links for 'Report a Problem' and 'Back to Top'.

20

REMINDER - THIS PROCESS  
IS THE SAME FOR ALL  
IDENTITIES, INCLUDING:  
ADMINISTRATION, FACULTY,  
STAFF, AND STUDENTS.



# ADDING UNIT USERS

by batch

You can download a template .CSV file from this page. When you have transferred all of the appropriate information from the roster to the .CSV spreadsheet, you will upload it from here.

FOLLOW THE "DOWNLOAD TEMPLATE" LINK!

The screenshot shows the 'MANAGE: EMPLOYEES' interface. At the top, there's a 'YOUR ORGANIZATION' header with a navigation bar containing links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a sub-header 'Report Manage Machines Products View'. The main section is titled 'MANAGE: EMPLOYEES' and includes a 'Select Account: Your Account' dropdown and an 'Export' button. A prominent blue button labeled 'Import Employees for Your Account' is visible. Below this, there's a 'File to Import:' section with a text input, 'Browse...', and 'Upload' buttons. To the right of these is a 'Return to Employee List' link. Three checkboxes are present: 'Update Existing Employees (this does not affect Allocation Codes)', 'Disable Employees that are not in this file', and 'Reassign conflicting Badge Numbers'. A yellow informational box at the bottom states: 'Select the CSV file containing your employee list above and click the **Upload** button to begin the import process. If you have not yet prepared your import file, you can download a template. Make sure you have selected the proper Account (if necessary) before either action to reduce potential errors.' At the very bottom, there's a footer with '©2004-2018 VendNovation' on the left and 'Report a Problem' and 'Back to Top' links on the right.



# ADDING UNIT USERS

by batch

USE EMPLOYEE/  
STUDENT ID#

CAN BE BLANK

RECOMMENDED  
DEFAULT "YES"

	A	B	C	D	E	F
1	First Name	Last Name	Employee #	Badge #	Language	Enabled
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

RECOMMENDED  
DEFAULT  
"ENGLISH"  
(FRENCH OR  
SPANISH  
AVAILABLE)

CANNOT BE BLANK

# ADDING UNIT USERS

by batch

Return to the employee import page, and upload your .CSV file.

ENSURE THAT YOU ARE IN THE CORRECT ACCOUNT!

The screenshot shows a web interface for managing employees. At the top, there's a header with a barcode and the word 'tools'. Below that, a navigation bar includes links like 'Home', 'Preferences', 'Tutorials', 'Contact Us', 'Select Organization', 'EULA', and 'Log Out'. The main section is titled 'MANAGE: EMPLOYEES' and has a 'Select Account:' dropdown menu set to 'Your Account'. A green arrow points to this dropdown. Below the dropdown is a section titled 'Import Employees for Your Account' with a 'Download Template' button. The 'File to Import:' section contains a text input field, a 'Browse' button, and an 'Upload' button. A green arrow points to the 'Browse' button. Below the buttons are three checkboxes: 'Update Existing Employees (this does not affect Allocation Codes)', 'Disable Employees that are not in this file', and 'Reassign conflicting Badge Numbers'. A green arrow points to the 'Upload' button. At the bottom, there's a yellow box with instructions: 'Select the CSV file containing your employee list above and click the Upload button to begin the import process. If you have not yet prepared your import file, you can download a template. Make sure you have selected the proper Account (if necessary) before either action to reduce potential errors.' The footer includes '©2004-2018 VendNovation', a 'Report a Problem' button, and a 'Back to Top' button.

CLICK THE "BROWSE" BUTTON, AND LOCATE YOUR .CSV FILE!

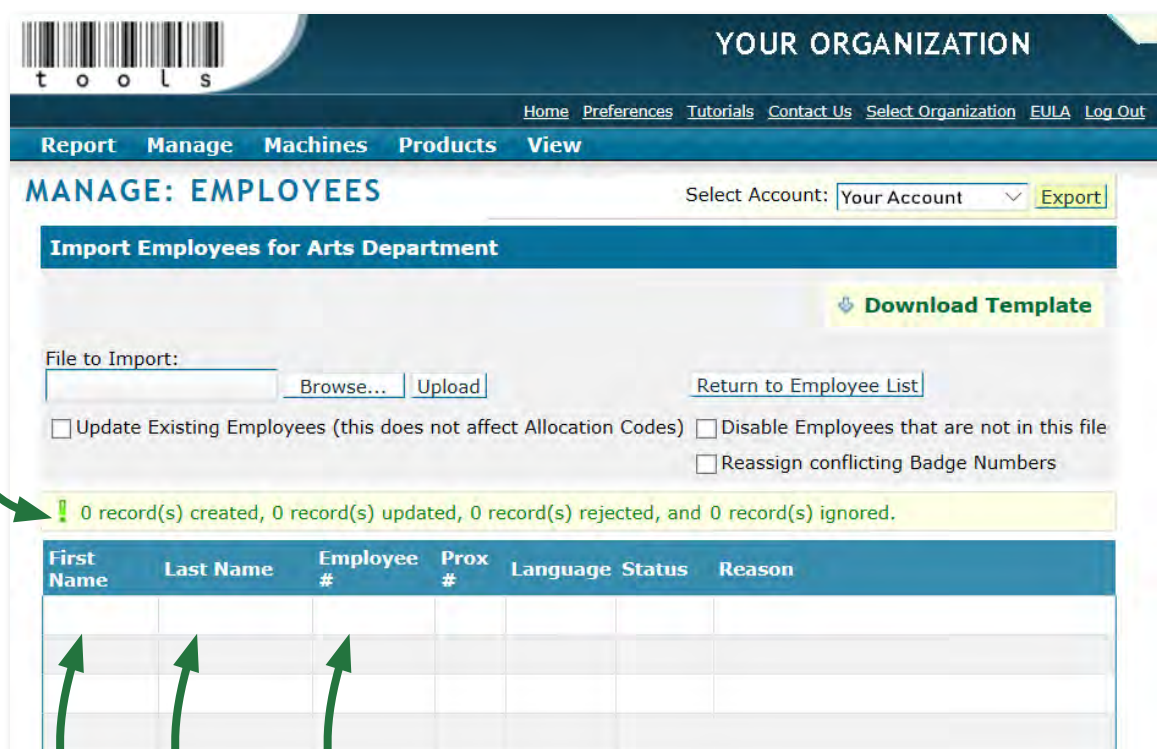
THEN, CLICK THE "UPLOAD" BUTTON!

# ADDING UNIT USERS

by batch

After uploading, you will return to the "Manage: Employees" page.

THIS MESSAGE CONFIRMS YOUR UPLOAD!



The screenshot shows the 'Manage: Employees' page in a web application. At the top, there's a navigation bar with 'tools' and 'YOUR ORGANIZATION'. Below that, a menu bar includes 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main heading is 'MANAGE: EMPLOYEES'. A sub-heading reads 'Import Employees for Arts Department'. There's a 'Download Template' button. A 'File to Import:' section has 'Browse...' and 'Upload' buttons, and a 'Return to Employee List' link. Below this are three checkboxes: 'Update Existing Employees (this does not affect Allocation Codes)', 'Disable Employees that are not in this file', and 'Reassign conflicting Badge Numbers'. A green confirmation message states: '0 record(s) created, 0 record(s) updated, 0 record(s) rejected, and 0 record(s) ignored.' Below the message is a table with columns: 'First Name', 'Last Name', 'Employee #', 'Prox #', 'Language', 'Status', and 'Reason'. Three green arrows point from the text 'EMPLOYEE (STUDENT) ENTRIES DISPLAY HERE!' to the first three columns of the table.

First Name	Last Name	Employee #	Prox #	Language	Status	Reason

EMPLOYEE (STUDENT) ENTRIES DISPLAY HERE!

# ADDING UNIT USERS

one at a time

The software refers to all types of users, regardless of hierarchy in your organization, as "employees". From your home page, navigate to the "Manage: Employees" page.

CLICK ON THE "MANAGE"  
DROPPDOWN MENU!

The screenshot shows the VendNovation software interface. At the top, there is a header with a barcode and the text 't o o l s'. To the right, it says 'YOUR ORGANIZATION'. Below the header, there is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar has tabs: Report, Manage, Machines, Products, and View. The 'Manage' tab is selected. Below the navigation bar, it says 'WELCOME - YOUR NAME' and 'QUICK STATUS'. There is a yellow box with the text 'Click blank tables to load additional data.' Below this, there are two tables: 'System Health' and 'Dispense Overview'. The 'System Health' table has rows for Total Machines, Machines Offline, Machines Online, No Recent Dispense, Low Product, and Active Alerts, all with a value of 0. The 'Dispense Overview' table has rows for Today, Yesterday, This Month, Last Month, Total Dispenses, and Total Value. Below these tables, there is a 'Product Overview' table with rows for Active SKUs, Units In Lockers, Units In Sites, Top Today, and Top This Month. On the right side of the interface, there is a dropdown menu for 'Manage' with the following options: Accounts, Sites, Users, Alert Routing, Supply Rooms, Employees, Employee Badges, Allocation Codes, Shift Definitions, Restriction Exceptions, and Restriction Check. The 'Employees' option is highlighted. A green arrow points from the 'MANAGE' dropdown menu to the 'EMPLOYEES' option in the dropdown menu.

Accounts  
Sites  
Users  
Alert Routing  
Supply Rooms  
Employees  
Employee Badges  
Allocation Codes  
Shift Definitions  
Restriction Exceptions  
Restriction Check

THEN, CLICK ON  
"EMPLOYEES"!



# ADDING UNIT USERS

one at a time

Select the appropriate account for the unit you are using.

CLICK ON THE "ACCOUNT"  
DROPPDOWN MENU!

The screenshot shows the 'MANAGE: EMPLOYEES' page in the VendNovation system. At the top, there is a header with a barcode and the word 'tools'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar includes Report, Manage, Machines, Products, and View. The page title is 'MANAGE: EMPLOYEES'. Below the title, there is a form with an 'Account:' label and a dropdown menu. The dropdown menu is currently open, showing three options: 'Select an account', 'Your Account', and 'Org Default Account'. A green arrow points from the text 'CLICK ON THE "ACCOUNT" DROPPDOWN MENU!' to the dropdown menu. Another green arrow points from the text 'THEN, CLICK ON THE ACCOUNT FOR THE LOCKER YOU ARE USING!' to the 'Your Account' option in the dropdown menu. The footer of the page includes the copyright notice '©2004-2018 VendNovation' and two buttons: 'Report a Problem' and 'Back to Top'.

Account: **Select an account** ▼

Select an account.

**Select an account**  
Your Account  
Org Default Account

Report a Problem Back to Top

THEN, CLICK ON THE ACCOUNT  
FOR THE LOCKER YOU ARE USING!

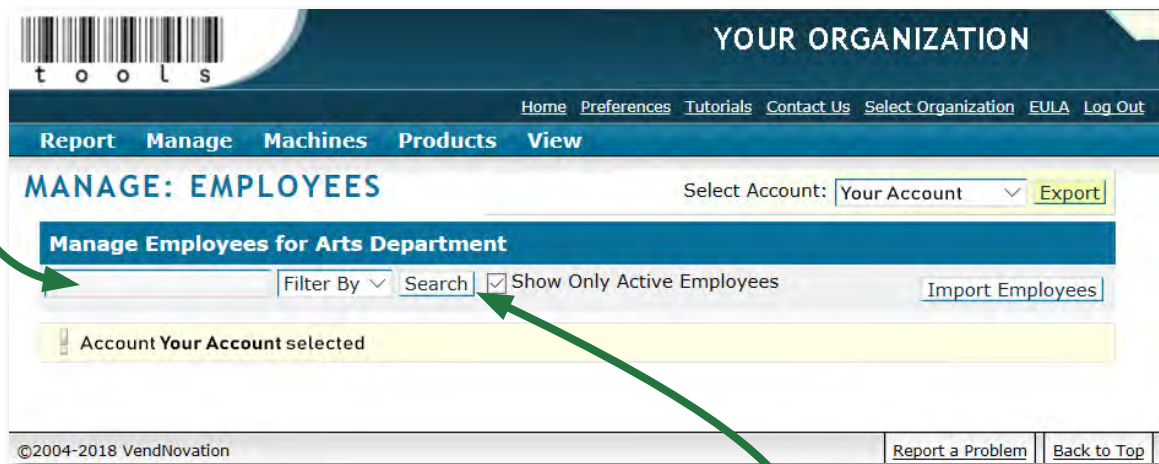


# ADDING UNIT USERS

one at a time

Navigate to the employee list

CAN BE EMPTY!



The screenshot shows a web application interface for managing employees. At the top, there's a header with a barcode and the text 't o o l s'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main section is titled 'MANAGE: EMPLOYEES' and includes a 'Select Account:' dropdown menu set to 'Your Account' with an 'Export' button. Below this is a sub-header 'Manage Employees for Arts Department'. The interface features a search bar, a 'Filter By' dropdown, a 'Search' button, a checkbox for 'Show Only Active Employees', and an 'Import Employees' button. A yellow message box states 'Account Your Account selected'. The footer contains copyright information '©2004-2018 VendNovation' and links for 'Report a Problem' and 'Back to Top'. Two green arrows are present: one points from the text 'CAN BE EMPTY!' to the search bar area, and another points from the text 'CLICK THE "SEARCH" BUTTON!' to the 'Search' button.

CLICK THE "SEARCH" BUTTON!

# ADDING UNIT USERS

one at a time

Evoked the employee identification input cells.

CLICK ON THE "INSERT" LINK!

The screenshot shows a web application interface for managing employees. At the top, there's a header with a barcode and the word 'tools'. Below it, a navigation bar includes links like 'Home', 'Preferences', 'Tutorials', 'Contact Us', 'Select Organization', 'EULA', and 'Log Out'. The main section is titled 'MANAGE: EMPLOYEES' and includes a 'Select Account' dropdown set to 'Your Account' and an 'Export' button. Below this, a sub-header reads 'Manage Employees for Arts Department'. There's a search bar, a 'Filter By' dropdown, a 'Search' button, a checkbox for 'Show Only Active Employees', and an 'Import Employees' button. The page indicates 'PAGE 1 OF 12'. A table lists employees with columns for 'Edit', 'Last Name', 'First Name', 'Employee #', 'Badge #', 'Language', 'Pin', and 'Details'. An 'Insert' link is located at the start of the table, with a green arrow pointing to it from the text 'CLICK ON THE "INSERT" LINK!'. Below the 'Insert' link is a note: 'Click Add to Add a New Account.' The table contains three rows of employee data.

Edit	Last Name	First Name	Employee #	Badge #	Language	Pin	Details
<a href="#">Insert</a>	Click Add to Add a New Account.						
<a href="#">Edit</a>	A	Employee	012345		English	<a href="#">Clear</a>   <a href="#">Reset</a>	<a href="#">Details</a>
<a href="#">Edit</a>	C	Employee	123456		English	<a href="#">Clear</a>   <a href="#">Reset</a>	<a href="#">Details</a>
<a href="#">Edit</a>	C	Employee	234567		English	<a href="#">Clear</a>   <a href="#">Reset</a>	<a href="#">Details</a>

# ADDING UNIT USERS

one at a time

Input the appropriate information for the unit user.

FILL IN THESE CELLS!

CAN BE EMPTY!

The screenshot shows the 'MANAGE: EMPLOYEES' interface. At the top, there's a 'YOUR ORGANIZATION' header with a navigation bar including 'Home', 'Preferences', 'Tutorials', 'Contact Us', 'Select Organization', 'EULA', and 'Log Out'. Below this is a sub-header 'Report Manage Machines Products View'. The main section is titled 'MANAGE: EMPLOYEES' and includes a 'Select Account: Your Account' dropdown and an 'Export' button. A section titled 'Manage Employees for Arts Department' contains a 'Filter By' dropdown, a 'Search' button, a 'Show Only Active Employees' checkbox, and an 'Import Employee' button. Below this is a table with columns: 'Edit', 'Last Name', 'First Name', 'Employee #', and 'Badge #'. The first row is highlighted in yellow and contains an 'Update Cancel' link, empty input fields for 'Last Name' and 'First Name', a value '0' for 'Employee #', and an empty 'Badge #' field. Below this are three rows of existing employees: A, B, and C, each with an 'Edit' link and their respective details.

SCROLL RIGHT FOR  
ADDITIONAL OPTIONS!

The screenshot shows a 'Language' dropdown menu. The dropdown is open, showing a list of 'English' entries. Each entry has a 'Clear' link, a 'Reset' link, and a 'Details' link. The first entry is highlighted in yellow. Green arrows point to the 'Clear', 'Reset', and 'Details' links for the first entry.

CLICK ON THE "UPDATE"  
LINK WHEN COMPLETE!



# ADDING UNIT USERS

one at a time

After updating, you will return to the "Manage: Employees" page.

FOR CONFIRMATION, YOU MAY SEARCH FOR YOUR NEW ENTRY HERE!

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MANAGE: EMPLOYEES

Select Account: Your Account Export

Manage Employees for Arts Department

Filter By Search Show Only Active Employees Import Employees

PAGE 1 OF 12

Edit	Last Name	First Name	Employee #	Badge #	Language	Pin	Details
<a href="#">Insert</a>	<<--Click Add to Add a New Account.						
<a href="#">Edit</a>	A	Employee	012345		English	<a href="#">Clear</a>   <a href="#">Reset</a>	<a href="#">Details</a>
<a href="#">Edit</a>	C	Employee	123456		English	<a href="#">Clear</a>   <a href="#">Reset</a>	<a href="#">Details</a>
<a href="#">Edit</a>	C	Employee	234567		English	<a href="#">Clear</a>   <a href="#">Reset</a>	<a href="#">Details</a>

# ADDING UNIT USERS

resetting P.I.N.s

Navigate to the "Manage: Employees" page.

CLICK ON THE "MANAGE"  
DROPPDOWN MENU!

The screenshot displays the VendNovation web application interface. At the top, there is a header with a barcode and the text "YOUR ORGANIZATION". Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation menu includes Report, Manage, Machines, Products, and View. The "Manage" dropdown menu is open, showing a list of options: Accounts, Sites, Users, Alert Routing, Supply Rooms, Employees, Employee Badges, Allocation Codes, Shift Definitions, Restriction Exceptions, and Restriction Check. The "Employees" option is highlighted. The main content area shows a welcome message, quick status, and various data tables.

WELCOME - YOUR NAME

QUICK STATUS

Click blank tables to load additional data.

System Health		Dispense Overview	
Total Machines	0	Today	
Machines Offline	0	Yesterday	
Machines Online	0	This Month	
No Recent Dispense	0	Last Month	
Low Product	0	Total Dispenses	
Active Alerts	0	Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sites	
Top Today	
Top This Month	

©2004-2018 VendNovation

THEN, CLICK ON  
"EMPLOYEES"!



# ADDING UNIT USERS

resetting P.I.N.s

Locate the employee identity, and "clear" the P.I.N.

SEARCH AND SORT BY ANY IDENTIFIER!

The screenshot shows a web application interface for managing employees. At the top, there's a header with a barcode and the word 'tools'. Below it, a navigation bar includes links like 'Home', 'Preferences', 'Tutorials', 'Contact Us', 'Select Organization', 'EULA', and 'Log Out'. The main section is titled 'MANAGE: EMPLOYEES' and includes a 'Select Account' dropdown set to 'Your Account' and an 'Export' button. Below this, there's a section for 'Manage Employees for Arts Department' with a search bar, a 'Filter By' dropdown, a 'Search' button, a checkbox for 'Show Only Active Employees', and an 'Import Employees' button. A table lists employees with columns for 'Edit', 'Last Name', 'First Name', 'Employee #', 'Badge #', 'Language', 'Pin', and 'Details'. The table contains three rows of employee data. Annotations include three green arrows pointing to the search bar, 'Filter By' dropdown, and 'Search' button, and a green arrow pointing to the 'Clear | Reset' link in the 'Pin' column of the third row. An orange arrow points from the 'Clear | Reset' link to the text below.

Edit	Last Name	First Name	Employee #	Badge #	Language	Pin	Details
<a href="#">Insert</a>	<--Click Add to Add a New Account.						
<a href="#">Edit</a>	A	Employee	012345		English	<a href="#">Clear</a>   <a href="#">Reset</a>	<a href="#">Details</a>
<a href="#">Edit</a>	C	Employee	123456		English	<a href="#">Clear</a>   <a href="#">Reset</a>	<a href="#">Details</a>
<a href="#">Edit</a>	C	Employee	234567		English	<a href="#">Clear</a>   <a href="#">Reset</a>	<a href="#">Details</a>

CLICK ON THE "CLEAR" LINK FOR THE APPROPRIATE EMPLOYEE!

**AVOID THE "RESET" LINK, FOR NOW.**  
IT IS FOR ADDED SECURITY SITUATIONS, IN WHICH P.I.N.S MUST BE REGULARLY CHANGED.

## section 4 of 6:

# ASSIGNING

products

34

compartments/coils

42

administrator access

53

33

Each product must be assigned a location from which it will be dispensed.  
Allocation codes can be assigned to restrict access.



## products to dispensing units

Each product must be assigned a location from which it will be dispensed. The software refers to all types of dispensing units generally as "Machines".

CLICK ON THE "MACHINES"  
DROPPDOWN MENU!

The screenshot shows the VendNovation software interface. At the top left is a barcode and the word "tools". At the top right is "YOUR ORGANIZATION". Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. A secondary navigation bar contains: Report, Manage, Machines, Products, and View. The "Machines" link is highlighted with a green arrow pointing to it from the text "CLICK ON THE 'MACHINES' DROPPDOWN MENU!". Below the navigation bar is a "WELCOME - YOUR NAME" message and a "QUICK STATUS" section. The "QUICK STATUS" section includes a message "Click blank tables to load additional data." and two tables: "System Health" and "Dispense Overview". The "System Health" table has rows for Total Machines, Machines Offline, Machines Online, No Recent Dispense, Low Product, and Active Alerts, all with a value of 0. The "Dispense Overview" table has rows for Today, Yesterday, This Month, Last Month, Total Dispenses, and Total Value. Below these is a "Product Overview" section with rows for Active SKUs, Units In Lockers, Units In Sinks, Top Today, and Top This Month. At the bottom left is the copyright notice "©2004-2018 VendNovation". A green arrow points from the text "THEN, CLICK ON 'MANAGE MACHINES'!" to a dropdown menu that appears when the "Machines" link is clicked. The dropdown menu contains the following options: Restock Report, Manage Machines, Adjust Inventory Levels, Machine Health, and Templates.

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

WELCOME - YOUR NAME

Change Password  
Log Out

QUICK STATUS

Click blank tables to load additional data.

System Health	
Total Machines	0
Machines Offline	0
Machines Online	0
No Recent Dispense	0
Low Product	0
Active Alerts	0

Dispense Overview	
Today	
Yesterday	
This Month	
Last Month	
Total Dispenses	
Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sinks	
Top Today	
Top This Month	

©2004-2018 VendNovation

Restock Report  
Manage Machines  
Adjust Inventory Levels  
Machine Health  
Templates

THEN, CLICK ON  
"MANAGE MACHINES"!

## products to dispensing units

Each product must be assigned to a location from which it will be dispensed. The software refers to all types of dispensing units as "Machines". Navigate to the "Manage Machines" page.

CLICK ON THE "MACHINES"  
DROPPDOWN MENU!

The screenshot shows the VendNovation software interface. At the top left is a barcode and the word "tools". At the top right is "YOUR ORGANIZATION". Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. A secondary navigation bar contains: Report, Manage, Machines, Products, and View. The "Machines" link is highlighted with a green arrow pointing to it from the text "CLICK ON THE 'MACHINES' DROPPDOWN MENU!". Below the navigation bar is a "WELCOME - YOUR NAME" message and a "QUICK STATUS" section. The "QUICK STATUS" section includes a message "Click blank tables to load additional data." and two tables: "System Health" and "Dispense Overview". The "System Health" table has rows for Total Machines, Machines Offline, Machines Online, No Recent Dispense, Low Product, and Active Alerts, all with a value of 0. The "Dispense Overview" table has rows for Today, Yesterday, This Month, Last Month, Total Dispenses, and Total Value. Below these is a "Product Overview" section with rows for Active SKUs, Units In Lockers, Units In Sinks, Top Today, and Top This Month. At the bottom left is the copyright notice "©2004-2018 VendNovation". A green arrow points from the text "THEN, CLICK ON 'MANAGE MACHINES'!" to a dropdown menu on the right side of the interface. The dropdown menu contains the following options: Restock Report, Manage Machines, Adjust Inventory Levels, Machine Health, and Templates.

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

WELCOME - YOUR NAME

Change Password Log Out

QUICK STATUS

Click blank tables to load additional data.

System Health	
Total Machines	0
Machines Offline	0
Machines Online	0
No Recent Dispense	0
Low Product	0
Active Alerts	0

Dispense Overview	
Today	
Yesterday	
This Month	
Last Month	
Total Dispenses	
Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sinks	
Top Today	
Top This Month	

©2004-2018 VendNovation

Restock Report  
Manage Machines  
Adjust Inventory Levels  
Machine Health  
Templates

THEN, CLICK ON  
"MANAGE MACHINES"!





## products to dispensing units

Navigate to the machines list.

CAN BE EMPTY!

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MANAGE MACHINES

Find Machines

All Sites Search

Begin by Searching Above.

Actions

- Search
- Create Machine
- Create Locker
- Export Visible Planograms
- Export Lockers

©2004-2018 VendNovation

Report a Problem Back to Top

CLICK THE "SEARCH" BUTTON!

## products to dispensing units

Select the dispensing unit (machine) you are using from the list.

CLICK ANYWHERE ON THIS FIELD!

The screenshot shows the 'MANAGE MACHINES' section of the VendNovation web application. At the top, there's a header with 'YOUR ORGANIZATION' and a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below the navigation bar, there's a sub-header with 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main content area is titled 'MANAGE MACHINES' and contains a 'Find Machines' section with a search bar and a dropdown menu set to 'All Sites'. A green arrow points from the text 'CLICK ANYWHERE ON THIS FIELD!' to the search bar. To the right of the search bar is a 'locker' button. On the far right, there's an 'Actions' menu with options: Search, Create Machine, Create Locker, Export Visible Planograms, and Export Lockers. The footer includes copyright information '©2004-2018 VendNovation' and links for 'Report a Problem' and 'Back to Top'.

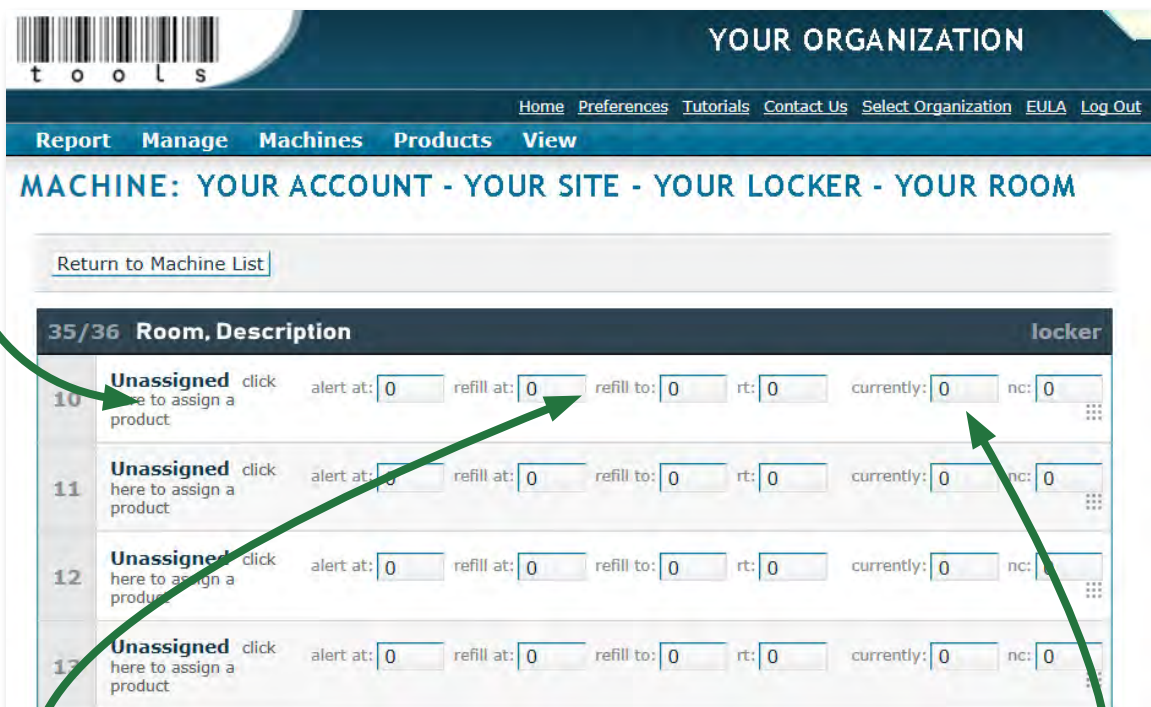
"MACHINES" WILL CONTINUE  
TO REGISTER HERE!



## products to dispensing units

Select the location to which you will assign a product. This page is called your "Planogram".

CLICK ON THIS FIELD!



The screenshot shows a web application interface for managing machines. At the top, there's a header with a barcode and the text 't o o l s'. Below it, a navigation bar includes links like 'Home', 'Preferences', 'Tutorials', 'Contact Us', 'Select Organization', 'EULA', and 'Log Out'. A secondary navigation bar has 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main heading is 'MACHINE: YOUR ACCOUNT - YOUR SITE - YOUR LOCKER - YOUR ROOM'. Below this is a 'Return to Machine List' button. The main content area is a table with columns: '35/36 Room, Description', 'locker', and several data columns. The table lists four machines, all with 'Unassigned' status. A green arrow points to the 'Unassigned' status in the first row, and another green arrow points to the 'currently' field in the same row.

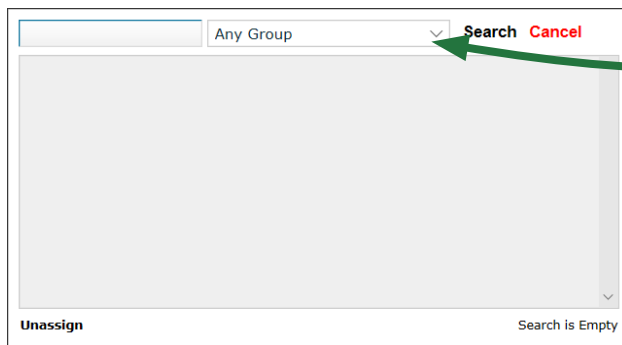
35/36 Room, Description	locker	alert at:	refill at:	refill to:	rt:	currently:	nc:
10 Unassigned click here to assign a product		0	0	0	0	0	0
11 Unassigned click here to assign a product		0	0	0	0	0	0
12 Unassigned click here to assign a product		0	0	0	0	0	0
13 Unassigned click here to assign a product		0	0	0	0	0	0

**NOTE:** WHEN STORING EQUIPMENT IN A LOCKER, "REFILL TO" MUST MATCH THE "CURRENTLY" COLUMN PRIOR TO DISPENSING ANY PRODUCTS!

## products to dispensing units

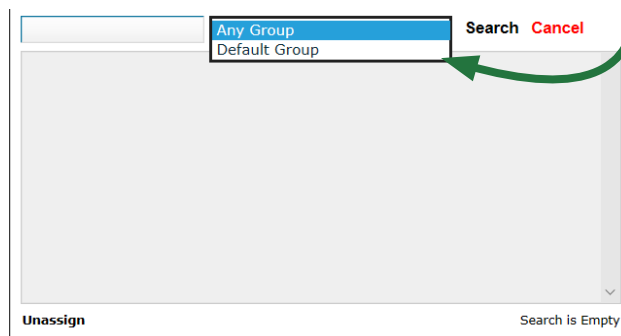
Select the product. If you are using groups, select the appropriate group. In most cases, you will select the "Default Group".

CLICK ON THE DROPPDOWN MENU!



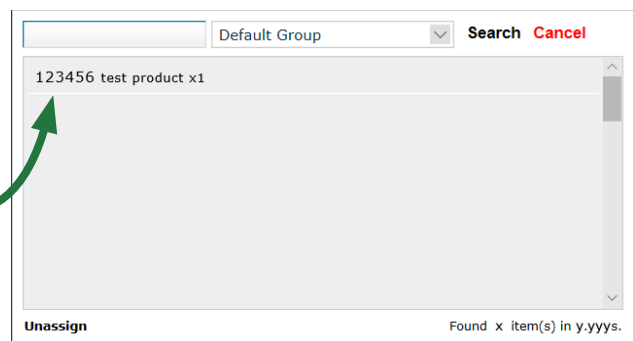
A screenshot of a web application interface for selecting products. At the top, there is a search bar with a dropdown menu currently showing "Any Group". To the right of the dropdown are "Search" and "Cancel" buttons. Below the search bar is a large, empty list area. At the bottom left is an "Unassign" button, and at the bottom right is the text "Search is Empty". A green arrow points from the text "CLICK ON THE DROPPDOWN MENU!" to the dropdown menu.

SELECT THE "DEFAULT GROUP"!



A screenshot of the same web application interface, but the dropdown menu is now open, showing two options: "Any Group" and "Default Group". The "Default Group" option is highlighted in blue. A green arrow points from the text "SELECT THE 'DEFAULT GROUP'!" to the "Default Group" option.

THEN, SELECT THE PRODUCT!



A screenshot of the web application interface showing the "Default Group" selected in the dropdown menu. The large list area now contains a single item: "123456 test product x1". A green arrow points from the text "THEN, SELECT THE PRODUCT!" to this item. At the bottom right, the text "Found x item(s) in y.yyy." is visible.

## products to dispensing units

Confirm that the entry is correct.

**DOUBLE CHECK THAT THE PRODUCT MATCHES THE LOCATION!**

YOUR ORGANIZATION

t o o l s

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MACHINE: YOUR ACCOUNT - YOUR SITE - YOUR LOCKER - YOUR ROOM

[Return to Machine List](#)

35/36	Room, Description	locker
10	123456 test product x1	alert at: 0 refill at: 0 refill to: 0 rt: 0 currently: 0 nc: 0
11	Unassigned click here to assign a product	alert at: 0 refill at: 0 refill to: 0 rt: 0 currently: 0 nc: 0
12	Unassigned click here to assign a product	alert at: 0 refill at: 0 refill to: 0 rt: 0 currently: 0 nc: 0
13	Unassigned click here to assign a product	alert at: 0 refill at: 0 refill to: 0 rt: 0 currently: 0 nc: 0

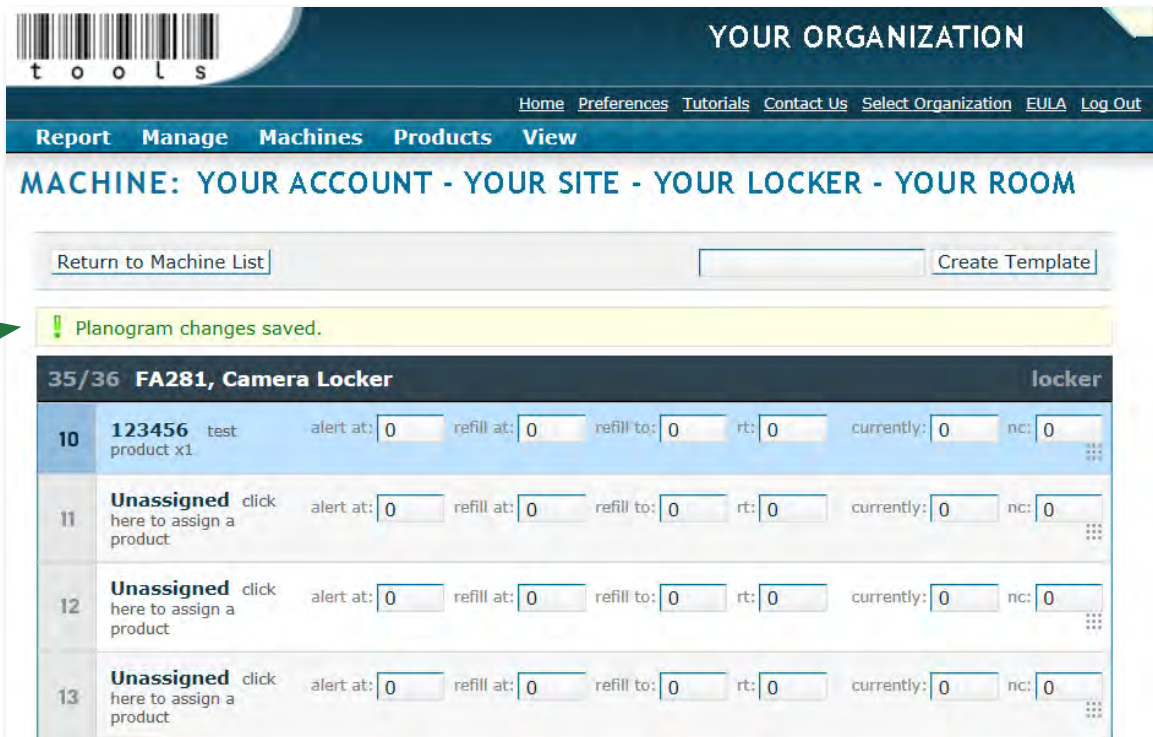
save changes

**CLICK "SAVE CHANGES" WHEN COMPLETE! REPEAT AS NECESSARY!**

## products to dispensing units

You will receive a confirmation message in the Planogram.

### CONFIRMATION MESSAGE!



The screenshot shows the Planogram web application interface. At the top, there is a header with a barcode and the text "t o o l s". To the right of the header is "YOUR ORGANIZATION". Below the header is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below the navigation bar is a sub-header with links: Report, Manage, Machines, Products, and View. Below the sub-header is a main header: MACHINE: YOUR ACCOUNT - YOUR SITE - YOUR LOCKER - YOUR ROOM. Below the main header is a section with two buttons: Return to Machine List and Create Template. Below this section is a yellow confirmation message: Planogram changes saved. Below the confirmation message is a table with 4 rows and 10 columns. The first row is highlighted in blue and contains the following data: 10, 123456, test, product x1, alert at: 0, refill at: 0, refill to: 0, rt: 0, currently: 0, nc: 0. The second row contains: 11, Unassigned, click here to assign a product, alert at: 0, refill at: 0, refill to: 0, rt: 0, currently: 0, nc: 0. The third row contains: 12, Unassigned, click here to assign a product, alert at: 0, refill at: 0, refill to: 0, rt: 0, currently: 0, nc: 0. The fourth row contains: 13, Unassigned, click here to assign a product, alert at: 0, refill at: 0, refill to: 0, rt: 0, currently: 0, nc: 0. A green arrow points from the "CONFIRMATION MESSAGE!" text to the yellow confirmation message.

				alert at:	refill at:	refill to:	rt:	currently:	nc:
10	123456	test	product x1	0	0	0	0	0	0
11	Unassigned	click here to assign a product		0	0	0	0	0	0
12	Unassigned	click here to assign a product		0	0	0	0	0	0
13	Unassigned	click here to assign a product		0	0	0	0	0	0

## employees to compartments/coils

In this section, you will use "Allocation Codes" to assign specific privileges to specific "Employees". Note: The software does not require the use of allocation codes for inventory tracking. Allocation codes offer added security measures.

CLICK ON THE "MANAGE"  
DROPPDOWN MENU!

The screenshot displays the VendNovation software interface. At the top, there is a header with a barcode and the text 't o o l s'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar includes 'Report', 'Manage', 'Machines', 'Products', and 'View'. The 'Manage' dropdown menu is open, showing a list of options: Accounts, Sites, Users, Alert Routing, Supply Rooms, Employees, Employee Badges, Allocation Codes, Shift Definitions, Restriction Exceptions, and Restriction Check. The 'Allocation Codes' option is highlighted. The main content area shows a 'WELCOME - YOUR NAME' message, a 'QUICK STATUS' section with a note to click blank tables to load additional data, and several data tables including System Health, Dispense Overview, and Product Overview. The footer contains the copyright notice '©2004-2018 VendNovation'.

System Health	
Total Machines	0
Machines Offline	0
Machines Online	0
No Recent Dispense	0
Low Product	0
Active Alerts	0

Dispense Overview	
Today	
Yesterday	
This Month	
Last Month	
Total Dispenses	
Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sinks	
Top Today	
Top This Month	

- Accounts
- Sites
- Users
- Alert Routing
- Supply Rooms
- Employees
- Employee Badges
- Allocation Codes**
- Shift Definitions
- Restriction Exceptions
- Restriction Check

THEN, CLICK ON  
"ALLOCATION CODES"!



## employees to compartments/coils

Select the appropriate account for the unit you are using.

CLICK ON THE "ACCOUNT"  
DROPPDOWN MENU!

The screenshot shows the 'MANAGE: ALLOCATION CODES' page in the VendNovation system. At the top, there is a 'tools' section with a barcode and a 'YOUR ORGANIZATION' header. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main content area has tabs for Report, Manage, Machines, Products, and View. The 'Manage' tab is active, showing the 'MANAGE: ALLOCATION CODES' section. In this section, there is a label 'Account:' followed by a dropdown menu currently displaying 'Select an account'. A green arrow points from the text 'CLICK ON THE "ACCOUNT" DROPPDOWN MENU!' to this dropdown. Below the dropdown is a yellow input field with the placeholder text 'Select an account.'. At the bottom of the page, there is a footer with the copyright notice '©2004-2018 VendNovation' and two buttons: 'Report a Problem' and 'Back to Top'. A second green arrow points from the text 'THEN, CLICK ON THE ACCOUNT FOR THE DISPENSING UNIT YOU ARE USING!' to the dropdown menu, which is now open, showing two options: 'Your Account' and 'Org Default Account'.

Account: Select an account ▼

Select an account.

©2004-2018 VendNovation

Select an account  
Your Account  
Org Default Account

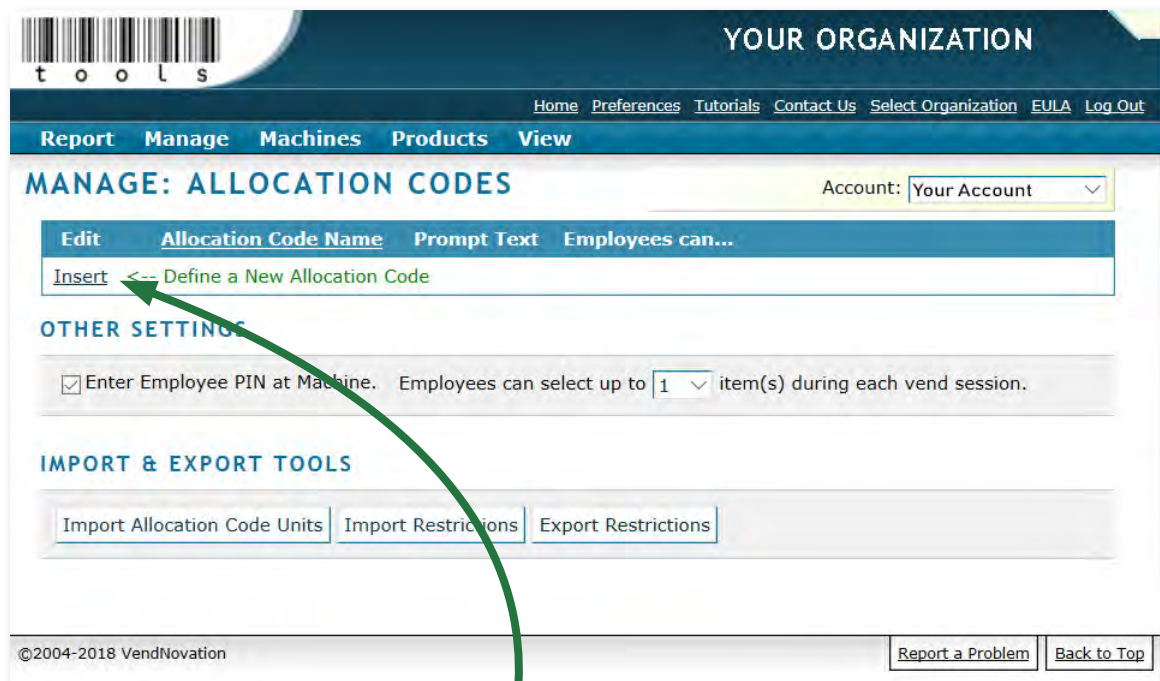
Report a Problem Back to Top

THEN, CLICK ON THE ACCOUNT  
FOR THE DISPENSING UNIT YOU  
ARE USING!



## employees to compartments/coils

Now that you are at the "Manage: Allocation Codes" page, define a new allocation code. An allocation code is essentially an identity (name) for a grouping (in this example a group of locker compartments). After setting this allocation code, you will adjust specific details regarding individuals (in this example, single locker compartments) within that grouping.



The screenshot shows the 'Manage: Allocation Codes' page. At the top, there is a 'tools' logo with a barcode and a 'YOUR ORGANIZATION' header. Below the header is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main content area has a sub-header 'MANAGE: ALLOCATION CODES' and an 'Account: Your Account' dropdown. A table with columns 'Edit', 'Allocation Code Name', 'Prompt Text', and 'Employees can...' is displayed. The first row contains an 'Insert' link and the text '<-- Define a New Allocation Code'. Below the table is the 'OTHER SETTINGS' section with a checkbox 'Enter Employee PIN at Machine.' and a dropdown 'Employees can select up to 1 item(s) during each vend session.'. The 'IMPORT & EXPORT TOOLS' section has buttons for 'Import Allocation Code Units', 'Import Restrictions', and 'Export Restrictions'. The footer includes '©2004-2018 VendNovation', 'Report a Problem', and 'Back to Top'.

CLICK ON THE "INSERT" LINK.

## employees to compartments/coils

Enter the appropriate information for the allocation code.

NAME THE ALLOCATION CODE AFTER THE DISPENSING UNIT!

The screenshot shows the 'MANAGE: ALLOCATION CODES' page. A green arrow points from the text 'NAME THE ALLOCATION CODE AFTER THE DISPENSING UNIT!' to the 'Allocation Code Name' field. Another green arrow points from the text 'UNCHECK' to the 'English' language selection area. A third green arrow points from the text 'CLICK ON THE "EMPLOYEES CAN..." DROPPDOWN MENU!' to the 'Employees can...' dropdown menu. A fourth green arrow points from the text 'THEN, SELECT "ONLY ENTER CODE NUMBERS THEY ARE ASSIGNED TO!"' to the dropdown menu's options. The dropdown menu is open, showing three options: '...enter any code number.', '...enter any valid code number.', and '...only enter code numbers they are assigned to.' (which is highlighted in blue). The page also includes a 'YOUR ORGANIZATION' header, a navigation bar with links like 'Home', 'Preferences', and 'Log Out', and sections for 'OTHER SETTINGS' and 'IMPORT & EXPORT TOOLS'.

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MANAGE: ALLOCATION CODES Account: Your Account

Edit	Allocation Code Name	Prompt Text	Employees can...
Update Cancel		English: <input type="checkbox"/> Enabled	...enter any code number.
		Spanish: <input type="checkbox"/> Enabled	Length Between: <input type="text"/> and <input type="text"/>
		French: <input type="checkbox"/> Enabled	Format Mask: <input type="text"/>

OTHER SETTINGS

☒ Enter Employee PIN at Machine. Employees can select up to 1 item(s) during each vend session.

IMPORT & EXPORT TOOLS

Import Allocation Code Units Import Restrictions Export Restrictions

©2004-2018 VendNovation

...enter any code number.  
...enter any valid code number.  
...only enter code numbers they are assigned to.

UNCHECK

CLICK ON THE "EMPLOYEES CAN..."  
DROPPDOWN MENU!

THEN, SELECT "ONLY ENTER CODE  
NUMBERS THEY ARE ASSIGNED TO!"

## employees to compartments/coils

Adjusting the first dropdown menu evokes a second menu.

CLICK ON THE SECOND DROPPDOWN MENU!

The screenshot shows the 'MANAGE: ALLOCATION CODES' page. At the top, there's a 'tools' section with a barcode and a 'YOUR ORGANIZATION' header with navigation links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, Log Out. Below this is a menu bar with 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main content area has a table with columns: 'Edit', 'Allocation Code Name', 'Prompt Text', and 'Employees can...'. The first row is highlighted in yellow. In the 'Employees can...' column, a dropdown menu is open, showing two options: '...dispense all items' and '...dispense only assigned items'. A green arrow points from the text 'CLICK ON THE SECOND DROPPDOWN MENU!' to the second option. Another green arrow points from the text 'THEN, SELECT "/>

Edit	Allocation Code Name	Prompt Text	Employees can...
Update Cancel		<b>English:</b> <input type="checkbox"/> Enable <b>Spanish:</b> <b>French:</b>	...only enter code numbers they are assigned to. ...dispense all items

OTHER SETTINGS

☒ Enter Employee PIN at Machine. Employees can select up to 1 item(s) during each vend session.

IMPORT & EXPORT TOOLS

Import Allocation Code Units Import Restrictions Export Restrictions

...dispense all items  
...dispense only assigned items

THEN, SELECT  
"DISPENSE ONLY ASSIGNED ITEMS!"

WHEN COMPLETE, PRESS "UPDATE"!

## employees to compartments/coils

This page confirms that the allocation code (grouping) has registered. From here you will edit accessibility restrictions for each compartment.

BE AWARE, WHILE YOU ARE APPLYING THIS ALLOCATION CODE, YOU MAY AFFECT ACCESSIBILITY AT THAT MOMENT - UNTIL YOU FINISH.

**YOUR ORGANIZATION**

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

### MANAGE: ALLOCATION CODES

Account: Your Account

**Warning:** Allocation Codes that appear in Red may be keeping your employees from purchasing items. Please confirm that you have created Allocation Code Units and assigned users to those Units. You may also temporarily disable the Allocation Codes in question.

Edit	Allocation Code Name	Prompt Text	Employees can...
<a href="#">Insert</a>	<-- Define a New Allocation Code		
<a href="#">Edit</a>	Test Unit		...only enter code numbers they are assigned to. ...vend only assigned items.

#### OTHER SETTINGS

☒ Enter Employee PIN at Machine. Employees can select up to  item(s) during each vend session.

#### IMPORT & EXPORT TOOLS

[Import Allocation Code Units](#) [Import Restrictions](#) [Export Restrictions](#)

©2004-2018 VendNovation [Report a Problem](#) [Back to Top](#)

CLICK ON THE DOWN ARROW BUTTON!



## employees to compartments/coils

You will now identify individual compartments within the grouping (allocation code). You may use the name of the "employee" to be assigned to the compartment, or the compartment number, or whatever you find most useful.

**CANNOT BE BLANK; CAN BE DUPLICATES!**

The screenshot shows a web application interface for managing allocation codes. At the top, there is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a sub-navigation bar with links: Report, Manage, Machines, Products, and View. The main heading is 'MANAGE: ALLOCATION CODES'. There are two links: 'Up to Code List' and 'Back to Test Unit List'. A search bar is present with a 'Search' button. A green button labeled 'Bulk Import Test Units' is on the right. Below this is a section titled 'Test Units at Your Account'. It contains a table with a 'Number' column and a 'Create New Test Unit' button. A red dashed box highlights the 'Create New Test Unit' button. An orange arrow points from the text 'ENTER INFORMATION IN CELLS AND CLICK "CREATE NEW [ALLOCATION CODE NAME]"!' to the 'Create New Test Unit' button. Green arrows point from the text 'CANNOT BE BLANK; CAN BE DUPLICATES!' to the 'Number' column and the 'Create New Test Unit' button. A green arrow points from the text 'ENTER INFORMATION IN CELLS AND CLICK "CREATE NEW [ALLOCATION CODE NAME]"!' to the 'Number' column.

**ENTER INFORMATION IN CELLS AND CLICK "CREATE NEW [ALLOCATION CODE NAME]"!**

REPEAT FOR EACH INDIVIDUAL  
(COMPARTMENT) WITHIN THE  
GROUPING (LOCKER)!

## employees to compartments/coils

Once all of the compartments are registered, add the "employees" who will be granted access to each compartment.

FOR EACH ENTRY (ONE AT A TIME),  
FOLLOW THE "EMPLOYEES" LINK!

The screenshot shows a web application interface for managing allocation codes. At the top, there's a header with a barcode and the word 'tools'. Below it, a navigation bar includes links like 'Home', 'Preferences', 'Tutorials', 'Contact Us', 'Select Organization', 'EULA', and 'Log Out'. The main section is titled 'MANAGE: ALLOCATION CODES' and features a search bar and a 'Bulk Import Test Unit' button. A table titled 'Test Unit at Your Account' lists various test units. Each row in the table has a 'Name' and 'Number' column, followed by a series of links: 'Employees', 'Bulk Assign Employees', 'Product Restrictions', and 'Group Restrictions'. A green arrow points from the text 'FOLLOW THE "EMPLOYEES" LINK!' to the 'Employees' link in the first row of the table.

Name:	Number:	Create New Test Unit
10 10		<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
11 11		<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
12 12		<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
13 13		<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
14 14		<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
15 15		<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
16 16		<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
17 17		<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
18 18		<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>



## employees to compartments/coils

Add the employees who are allowed to access the compartment.

TO ASSIGN AN EMPLOYEE CLICK THE "MOVE TO" LINK!

The screenshot shows a web application interface for managing allocation codes. At the top, there's a header with a barcode and the text 't o o l s'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main section is titled 'MANAGE: ALLOCATION CODES' and includes a search bar, a page indicator (Page 1), and a dropdown for 'Test Unit : 10'. There are several tabs: 'Employees', 'Bulk Assign Employees', 'Product Restrictions', 'Group Restrictions', and 'Bulk Import Restrictions'. The 'Employees' tab is active, showing a table titled 'Employees at Test Unit'. The table lists employees A through H, each with a unique ID and a 'Move to 10' link. A green arrow points from the text 'TO ASSIGN AN EMPLOYEE CLICK THE "MOVE TO" LINK!' to the 'Move to 10' link for employee C. Another green arrow points from the text 'WHEN DONE, CLICK ON THE "BACK TO [ALLOCATION CODE] LIST" LINK!' to the 'Back to Test Unit List' link at the top right of the table.

Employees at Test Unit		
A (last), Employee (first)	000001	Move to <a href="#">10</a>
B (last), Employee (first)	000010	Move to <a href="#">10</a>
C (last), Employee (first)	000100	Move to <a href="#">10</a>
D (last), Employee (first)	001000	Move to <a href="#">10</a>
E (last), Employee (first)	010000	Move to <a href="#">10</a>
F (last), Employee (first)	100000	Move to <a href="#">10</a>
G (last), Employee (first)	100001	Move to <a href="#">10</a>
H (last), Employee (first)	100010	Move to <a href="#">10</a>

WHEN DONE, CLICK ON THE "BACK TO [ALLOCATION CODE] LIST" LINK!

## employees to compartments/coils

Once all of the employees are registered, add the products to which those employees will be granted access.

FOR EACH ENTRY (ONE AT A TIME),  
FOLLOW THE "PRODUCT RESTRICTIONS"  
LINK!

The screenshot displays the 'MANAGE: ALLOCATION CODES' page. At the top, there's a navigation bar with 'Home', 'Preferences', 'Tutorials', 'Contact Us', 'Select Organization', 'EULA', and 'Log Out'. Below this is a sub-navigation bar with 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main heading is 'MANAGE: ALLOCATION CODES'. There's a search bar and a 'Bulk Import Test Unit' button. The main content area is titled 'Test Unit at Your Account' and contains a table with 10 rows of test units. Each row has a 'Name' and 'Number' field, followed by a 'Create New Test Unit' button. The table lists test units 10 through 18, each with a set of links: 'Employees', 'Bulk Assign Employees', 'Product Restrictions', and 'Group Restrictions'. A green arrow points from the text 'FOR EACH ENTRY (ONE AT A TIME), FOLLOW THE "PRODUCT RESTRICTIONS" LINK!' to the 'Product Restrictions' link in the first row of the table.

Name	Number	Create New Test Unit
10	10	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
11	11	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
12	12	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
13	13	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
14	14	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
15	15	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
16	16	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
17	17	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
18	18	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>

## employees to compartments/coils

Add the appropriate product(s) to the identity (compartment).

TO ASSIGN A PRODUCT CLICK THE  
"MAY NOT DISPENSE" LINK!

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MANAGE: ALLOCATION CODES [Up to Code List](#) [Back to Test Unit List](#)

Search All Groups Test Unit : 10

☒ Limit Results to Active Products All Machines ☐ Limit Results to Current Restrictions

Employees Bulk Assign Employees Product Restrictions Group Restrictions Toggle All Bulk Import Restrictions

**Product Restrictions at Test Unit**

123456	test product	Default Group	<a href="#">may not dispense</a>
234567	test product (2)	Default Group	<a href="#">may not dispense</a>
345678	test product (3)	Default Group	<a href="#">may not dispense</a>

WHEN DONE, CLICK ON THE "BACK TO  
[ALLOCATION CODE] LIST" LINK!

# ASSIGNING

## administrator access

This subsection assumes that you are using "Allocation Codes" to assign specific privileges to specific employees. This is unnecessary if you are not using allocation codes as demonstrated in the previous subsection.

CLICK ON THE "MANAGE" DROPPDOWN MENU!

The screenshot displays the VendNovation web application interface. At the top, there is a header with a barcode and the text "t o o l s". To the right, it says "YOUR ORGANIZATION". Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar includes "Report", "Manage", "Machines", "Products", and "View". Below the navigation bar, it says "WELCOME - YOUR NAME" and "QUICK STATUS". A yellow box contains the text "Click blank tables to load additional data." Below this are two tables: "System Health" and "Dispense Overview". The "System Health" table has rows for Total Machines, Machines Offline, Machines Online, No Recent Dispense, Low Product, and Active Alerts, all with a value of 0. The "Dispense Overview" table has rows for Today, Yesterday, This Month, Last Month, Total Disposes, and Total Value. Below these tables is a "Product Overview" table with rows for Active SKUs, Units In Lockers, Units In Sites, Top Today, and Top This Month. On the right side, there is a dropdown menu for "Manage" with the following options: Accounts, Sites, Users, Alert Routing, Supply Rooms, Employees, Employee Badges, Allocation Codes, Shift Definitions, Restriction Exceptions, and Restriction Check. A green arrow points from the "MANAGE" dropdown menu to the "Allocation Codes" option.

System Health	
Total Machines	0
Machines Offline	0
Machines Online	0
No Recent Dispense	0
Low Product	0
Active Alerts	0

Dispense Overview	
Today	
Yesterday	
This Month	
Last Month	
Total Disposes	
Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sites	
Top Today	
Top This Month	

- Accounts
- Sites
- Users
- Alert Routing
- Supply Rooms
- Employees
- Employee Badges
- Allocation Codes
- Shift Definitions
- Restriction Exceptions
- Restriction Check

THEN, CLICK ON "ALLOCATION CODES"!



## administrator access

Select the appropriate account for the unit you are using.

CLICK ON THE "ACCOUNT"  
DROPPDOWN MENU!

The screenshot shows the 'MANAGE: ALLOCATION CODES' interface. At the top, there is a 'tools' section with a barcode and a 'YOUR ORGANIZATION' header. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar includes Report, Manage, Machines, Products, and View. The page title is 'MANAGE: ALLOCATION CODES'. Below the title, there is a form with an 'Account:' label and a dropdown menu currently showing 'Select an account'. A green arrow points from the text 'CLICK ON THE "ACCOUNT" DROPPDOWN MENU!' to this dropdown. Below the dropdown is a yellow input field with the placeholder text 'Select an account.'. At the bottom of the page, there is a footer with '©2004-2018 VendNovation', a 'Report a Problem' button, and a 'Back to Top' button. A dropdown menu is open, showing 'Select an account' (highlighted in blue), 'Your Account', and 'Org Default Account'. A green arrow points from the text 'THEN, CLICK ON THE ACCOUNT FOR THE DISPENSING UNIT YOU ARE USING!' to the 'Select an account' option in this dropdown.

Account: Select an account ▼

Select an account.

©2004-2018 VendNovation Select an account Report a Problem Back to Top

Your Account  
Org Default Account

THEN, CLICK ON THE ACCOUNT  
FOR THE DISPENSING UNIT YOU  
ARE USING!



# administrator access

Navigate to the Allocation Code Name list.

The screenshot shows the 'MANAGE: ALLOCATION CODES' page in the VendNovation system. At the top, there's a 'YOUR ORGANIZATION' header with a 'tools' logo and a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a sub-header with 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main title is 'MANAGE: ALLOCATION CODES' with an 'Account: Your Account' dropdown. A table lists allocation codes with columns: Edit, Allocation Code Name, Prompt Text, and Employees can... The first row is 'Test Unit' with a green arrow pointing to its 'Edit' button. Below the table are sections for 'OTHER SETTINGS' (with a checkbox for 'Enter Employee PIN at Machine') and 'IMPORT & EXPORT TOOLS' (with buttons for 'Import Allocation Code Units', 'Import Restrictions', and 'Export Restrictions'). The footer contains copyright information and links for 'Report a Problem' and 'Back to Top'.

55

CLICK ON THE DOWN ARROW BUTTON!





## administrator access

Add another identity to the allocation code. This will be for employees who will be granted access to all compartments.

CANNOT BE BLANK; CAN BE DUPLICATES!  
FOR EXAMPLE, "ADMIN"; "ADMIN"

The screenshot shows the 'MANAGE: ALLOCATION CODES' page. At the top, there's a 'tools' section with a barcode and a 'YOUR ORGANIZATION' header. Below this is a navigation bar with links: Home, Preference, Tutorials, Contact Us, Select Organization, EULA, Log Out. The main section has tabs: Report, Manage, Machines, Products, View. The 'Manage' tab is active, showing 'MANAGE: ALLOCATION CODES'. There's a search bar and a 'Bulk Import Test Unit' button. Below this is a table titled 'Test Unit at Your Account'. The table has columns for 'Name', 'Number', and a list of actions: 'Employees', 'Bulk Assign Employees', 'Product Restrictions', and 'Group Restrictions'. The 'Create New Test Unit' button is highlighted with a red dashed box. Green arrows point from the text 'CANNOT BE BLANK; CAN BE DUPLICATES!' to the 'Name' and 'Number' columns. An orange arrow points from the text 'ENTER INFORMATION IN CELLS AND CLICK "/>

Name	Number	Employees	Bulk Assign Employees	Product Restrictions	Group Restrictions
10	10	<a href="#">Employees</a>	<a href="#">Bulk Assign Employees</a>	<a href="#">Product Restrictions</a>	<a href="#">Group Restrictions</a>
11	11	<a href="#">Employees</a>	<a href="#">Bulk Assign Employees</a>	<a href="#">Product Restrictions</a>	<a href="#">Group Restrictions</a>
12	12	<a href="#">Employees</a>	<a href="#">Bulk Assign Employees</a>	<a href="#">Product Restrictions</a>	<a href="#">Group Restrictions</a>
13	13	<a href="#">Employees</a>	<a href="#">Bulk Assign Employees</a>	<a href="#">Product Restrictions</a>	<a href="#">Group Restrictions</a>
14	14	<a href="#">Employees</a>	<a href="#">Bulk Assign Employees</a>	<a href="#">Product Restrictions</a>	<a href="#">Group Restrictions</a>
15	15	<a href="#">Employees</a>	<a href="#">Bulk Assign Employees</a>	<a href="#">Product Restrictions</a>	<a href="#">Group Restrictions</a>
16	16	<a href="#">Employees</a>	<a href="#">Bulk Assign Employees</a>	<a href="#">Product Restrictions</a>	<a href="#">Group Restrictions</a>
17	17	<a href="#">Employees</a>	<a href="#">Bulk Assign Employees</a>	<a href="#">Product Restrictions</a>	<a href="#">Group Restrictions</a>
18	18	<a href="#">Employees</a>	<a href="#">Bulk Assign Employees</a>	<a href="#">Product Restrictions</a>	<a href="#">Group Restrictions</a>

ENTER INFORMATION IN CELLS AND CLICK  
"CREATE NEW [ALLOCATION CODE NAME]"!

## administrator access

After the identity ("Admin") is registered, add the employees who will be granted access to each compartment.

**FOLLOW THE "EMPLOYEES" LINK!**

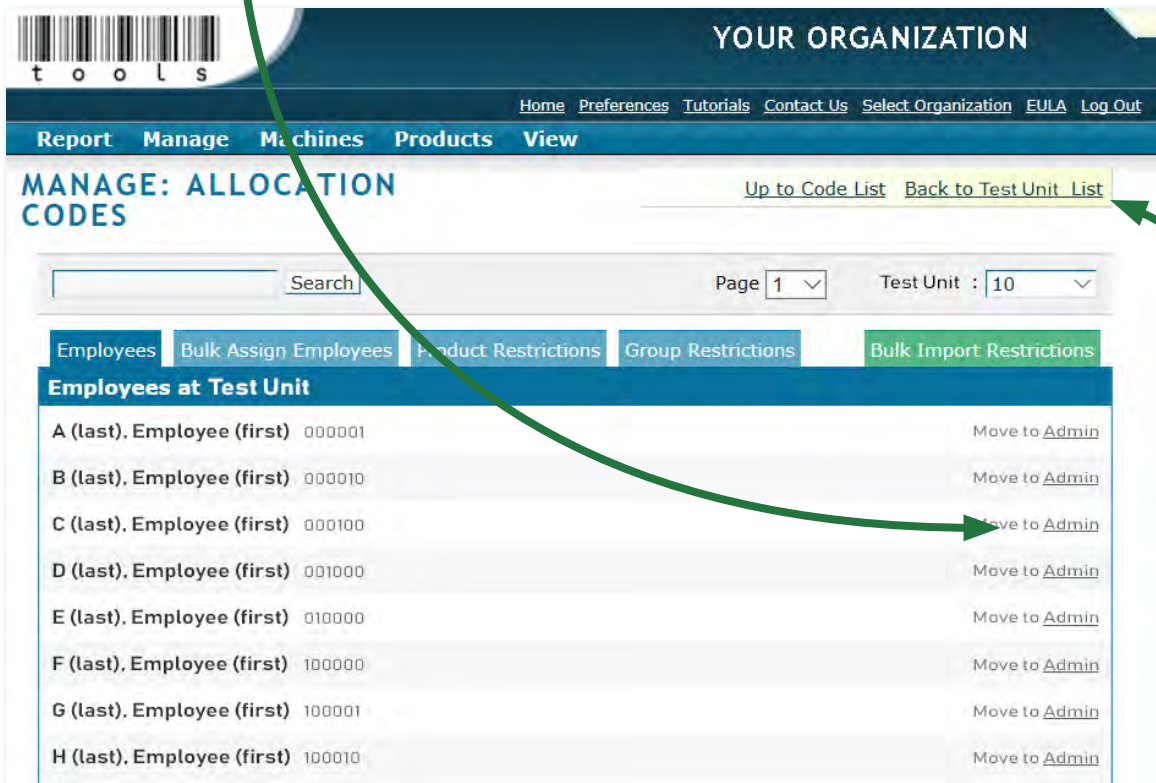
The screenshot shows a web application interface for managing organizations. At the top, there's a header with a barcode and the word 'tools'. Below it, a navigation bar includes links like Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main section is titled 'YOUR ORGANIZATION' and contains a sub-header 'MANAGE: ALLOCATION CODES'. A search bar is present. Below the search bar, there's a table titled 'Test Unit at Your Account'. The table has columns for Name, Number, and a list of links (Employees, Bulk Assign Employees, Product Restrictions, Group Restrictions). The 'Admin' row is highlighted, and a green arrow points to the 'Employees' link in this row.

Name:	Number:	Create New Test Unit
32	32	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
33	33	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
34	34	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
35	35	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
37	37	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
38	38	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
39	39	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
40	40	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
Admin	Admin	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>

## administrator access

Add the employees who are allowed to access the full unit.

TO ASSIGN AN EMPLOYEE CLICK THE "MOVE TO" LINK!



The screenshot shows a web application interface for managing allocation codes. At the top, there's a header with a barcode and the text 't o o l s'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main section is titled 'MANAGE: ALLOCATION CODES' and includes a search bar, a page number dropdown (Page 1), and a test unit dropdown (Test Unit : 10). There are several tabs: Employees, Bulk Assign Employees, Product Restrictions, Group Restrictions, and Bulk Import Restrictions. The 'Employees' tab is active, showing a table titled 'Employees at Test Unit'. The table lists employees A through H, each with a unique code and a 'Move to Admin' link. A green arrow points from the text 'TO ASSIGN AN EMPLOYEE CLICK THE "MOVE TO" LINK!' to the 'Move to Admin' link for employee C. Another green arrow points from the text 'WHEN DONE, CLICK ON THE "BACK TO [ALLOCATION CODE] LIST" LINK!' to the 'Back to Test Unit List' link at the top right of the table.

Employee	Code	Action
A (last), Employee (first)	000001	Move to <a href="#">Admin</a>
B (last), Employee (first)	000010	Move to <a href="#">Admin</a>
C (last), Employee (first)	000100	Move to <a href="#">Admin</a>
D (last), Employee (first)	001000	Move to <a href="#">Admin</a>
E (last), Employee (first)	010000	Move to <a href="#">Admin</a>
F (last), Employee (first)	100000	Move to <a href="#">Admin</a>
G (last), Employee (first)	100001	Move to <a href="#">Admin</a>
H (last), Employee (first)	100010	Move to <a href="#">Admin</a>

WHEN DONE, CLICK ON THE "BACK TO [ALLOCATION CODE] LIST" LINK!

## administrator access

After the employees are registered, add the products that can be dispensed to those employees.

**FOLLOW THE "PRODUCT RESTRICTIONS" LINK!**

The screenshot shows a web application interface for 'YOUR ORGANIZATION'. At the top, there is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a secondary navigation bar with links: Report, Manage, Machines, Products, and View. The main heading is 'MANAGE: ALLOCATION CODES'. There is a search bar with a 'Search' button. A green button labeled 'Bulk Import Test Unit' is visible. Below this is a section titled 'Test Unit at Your Account'. It contains a table with columns for Name, Number, and a list of links. The 'Admin' user is highlighted, and the 'Product Restrictions' link is pointed to by a green arrow from the text 'FOLLOW THE "PRODUCT RESTRICTIONS" LINK!'. The table also includes a 'Create New Test Unit' button.

Name:	Number:	Create New Test Unit
32	32	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
33	33	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
34	34	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
35	35	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
37	37	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
38	38	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
39	39	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
40	40	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
Admin	Admin	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>



## administrator access

Add all the products in the dispensing unit to the [Admin] identity.

TO ASSIGN A PRODUCT CLICK THE  
"MAY NOT DISPENSE" LINK!

The screenshot shows the 'MANAGE: ALLOCATION CODES' interface. At the top, there's a 'YOUR ORGANIZATION' header with navigation links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a menu bar with 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main heading is 'MANAGE: ALLOCATION CODES'. There are two links: 'Up to Code List' and 'Back to Test Unit List'. A search bar is present with a 'Search' button and a dropdown for 'All Groups'. A 'Test Unit' dropdown is set to '10'. There are checkboxes for 'Limit Results to Active Products' and 'Limit Results to Current Restrictions'. Below these are buttons for 'Employees', 'Bulk Assign Employees', 'Product Restrictions', and 'Group Restrictions'. A 'Toggle All' button is also visible. The main section is titled 'Product Restrictions at Test Unit' and contains a table with three rows of product data. Each row has a 'may not dispense' link. A green arrow points from the text 'TO ASSIGN A PRODUCT CLICK THE "/>

Product Restrictions at Test Unit			
123456	test product	Default Group	<a href="#">may not dispense</a>
234567	test product (2)	Default Group	<a href="#">may not dispense</a>
345678	test product (3)	Default Group	<a href="#">may not dispense</a>

WHEN DONE, CLICK ON THE "BACK TO  
[ALLOCATION CODE] LIST" LINK!

section 5 of 6:

# STATUS CHECKING

by product

62

by dispensing unit

67

by employee

72

by planogram

75

61

We have several methods to find the information you are looking for. The "Report" dropdown menu offers several combinations of tracking information. This section is made up of just a few examples. We suggest that you run several reports to find which of them most effectively offers the combination of information that is most critical to you.





# STATUS CHECKING

by product

Navigate to the "Product Location" report.

CLICK ON THE "REPORT"  
DROPPDOWN MENU!

The screenshot shows the VendNovation dashboard interface. At the top, there's a header with a barcode and the word "tools". Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar includes "Report", "Manage", "Machines", "Products", and "View". The "Report" dropdown menu is open, showing a list of reports including Usage Summary, Sales by Range, Inventory Consumption, Comparative Usage by Time, Transactions, Machine Checkbook, Restock Summary, Adjustment Summary, Inventory Totals, Product Location, Restock History, Par Optimization, Item Turnover Rate, Inventory Levels, Temperature Log, Authentication Errors, Unsold Product, Report Profit, Employee Rollup, Transaction Rollup, Employee Import Log, Machine Downtime, Locker Logs, Unit and Locker Status, Bay Status, Projected Ageing, and Automated Reports. The dashboard also features a "WELCOME - YOUR NAME" section, a "QUICK STATUS" section with a note to click blank tables to load additional data, and several data tables: System Health, Dispense Overview, and Product Overview. The footer shows the copyright notice: ©2004-2018 VendNovation.

**YOUR ORGANIZATION**

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

WELCOME - YOUR NAME

Change Password Log Out

QUICK STATUS

Click blank tables to load additional data.

System Health	
Total Machines	0
Machines Offline	0
Machines Online	0
No Recent Dispense	0
Low Product	0
Active Alerts	0

Dispense Overview	
Today	
Yesterday	
This Month	
Last Month	
Total Disposes	
Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sales	
Top Today	
Top This Month	

- Usage Summary
- Sales by Range
- Inventory Consumption
- Comparative Usage by Time
- Transactions
- Machine Checkbook
- Restock Summary
- Adjustment Summary
- Inventory Totals
- Product Location
- Restock History
- Par Optimization
- Item Turnover Rate
- Inventory Levels
- Temperature Log
- Authentication Errors
- Unsold Product
- Report Profit
- Employee Rollup
- Transaction Rollup
- Employee Import Log
- Machine Downtime
- Locker Logs
- Unit and Locker Status
- Bay Status
- Projected Ageing
- Automated Reports

©2004-2018 VendNovation

THEN, CLICK ON  
"PRODUCT LOCATION"!



# STATUS CHECKING

by product

Open the product selection panel.

FOLLOW THE  
"CLICK HERE TO SELECT PRODUCT" LINK!

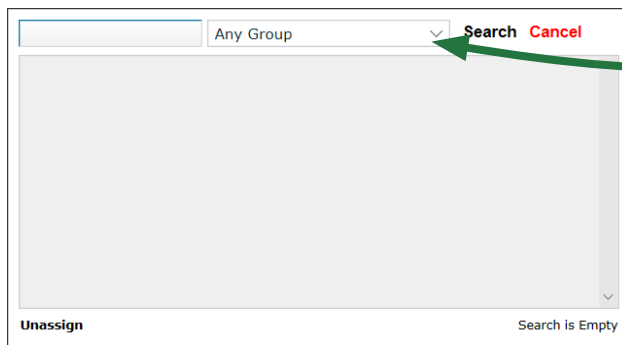
The screenshot shows a web application interface for 'YOUR ORGANIZATION'. At the top left is a barcode with the word 'tools' below it. The top right has the text 'YOUR ORGANIZATION'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Underneath is another navigation bar with tabs: Report, Manage, Machines, Products, and View. The main heading is 'REPORT: PRODUCT LOCATION'. Below this is a search area with the text 'Locate Click Here to Select Product at' followed by a dropdown menu set to 'All Accounts', and buttons for 'Search' and 'Export'. A yellow box contains the instruction: 'Use this page to locate a specific product in any of your Accounts.' At the bottom left is the copyright notice '©2004-2018 VendNovation'. At the bottom right are two buttons: 'Report a Problem' and 'Back to Top'.

# STATUS CHECKING

by product

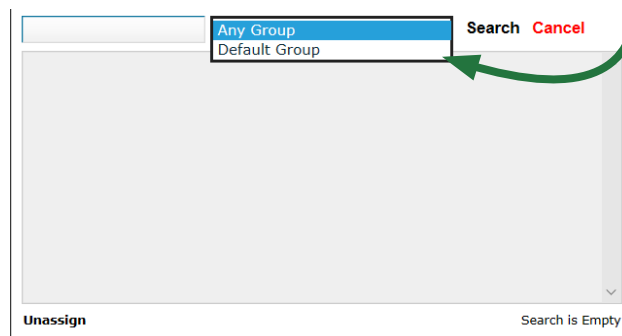
Select the product. If you are using groups, select the appropriate group. In most cases, you will select the "Default Group".

CLICK ON THE DROPPDOWN MENU!



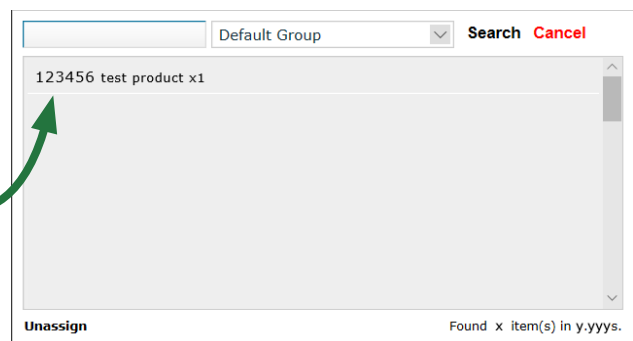
A screenshot of a web interface for status checking. At the top, there is a search bar with a dropdown menu currently showing "Any Group". To the right of the dropdown are "Search" and "Cancel" buttons. Below the search bar is a large, empty list area. At the bottom left is an "Unassign" button, and at the bottom right is the text "Search is Empty". A green arrow points from the text "CLICK ON THE DROPPDOWN MENU!" to the dropdown menu.

SELECT THE "DEFAULT GROUP"!



A screenshot of the same web interface, but the dropdown menu is now open, showing two options: "Any Group" and "Default Group". The "Default Group" option is highlighted in blue. A green arrow points from the text "SELECT THE 'DEFAULT GROUP'!" to the "Default Group" option.

THEN, SELECT THE PRODUCT!



A screenshot of the web interface showing the "Default Group" selected in the dropdown menu. The large list area now contains one item: "123456 test product x1". A green arrow points from the text "THEN, SELECT THE PRODUCT!" to this item. At the bottom right, the text "Found x item(s) in y.yyy." is visible.

# STATUS CHECKING

by product

Perform the search.

CLICK THE "SEARCH" BUTTON.

The screenshot shows a web application interface for 'YOUR ORGANIZATION'. At the top left is a barcode and the word 'tools'. A navigation bar contains links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a menu with 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main heading is 'REPORT: PRODUCT LOCATION'. A search bar contains the text 'Locate 123456 test product at' followed by a dropdown menu set to 'All Accounts', a 'Search' button, and an 'Export' button. A green arrow points from the text 'CLICK THE "SEARCH" BUTTON.' to the 'Search' button. Another green arrow points from the text 'IF NEEDED, NARROW YOUR SEARCH BY SELECTING AN ACCOUNT!' to the dropdown menu. Below the search bar is a yellow instruction box: 'Use this page to locate a specific product in any of your Accounts.' The footer includes '©2004-2018 Vendovation' and two buttons: 'Report a Problem' and 'Back to Top'.

IF NEEDED, NARROW YOUR SEARCH BY  
SELECTING AN ACCOUNT!

# STATUS CHECKING

by product

The precise assigned location is shown along with the quantity.

WHEN REVIEWING MULTIPLE RESULTS,  
SORT WITH ANY COLUMN HEADER.

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

REPORT: PRODUCT LOCATION

Locate **123456 test product x1** at All Accounts Search Export

Account	Site	Machine	Location	Bin/Bay	Count
Your Account	Your Site	Test Unit	Room	1	0

©2004-2018 VendNovation Report a Problem Back to Top

REPEAT YOUR SEARCH FOR AS MANY  
PRODUCTS AS NECESSARY BY  
SELECTING A DIFFERENT PRODUCT!

MOST REPORTS CAN BE  
EXPORTED AS .CSV FILES,  
SOME CAN BE AUTOMATED!



# STATUS CHECKING

by dispensing unit

Navigate to the "Machine Checkbook" report.

CLICK ON THE "REPORT"  
DROPPDOWN MENU!

The screenshot displays the VendNovation web application interface. At the top, there is a header with a barcode and the text 't o o l s'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar includes 'Report', 'Manage', 'Machines', 'Products', and 'View'. The 'Report' dropdown menu is open, showing a list of reports including 'Usage Summary', 'Sales by Range', 'Inventory Consumption', 'Comparative Usage by Time', 'Transactions', 'Machine Checkbook', 'Restock Summary', 'Adjustment Summary', 'Inventory Totals', 'Product Location', 'Restock History', 'Par Optimization', 'Item Turnover Rate', 'Inventory Levels', 'Temperature Log', 'Authentication Errors', 'Unsold Product', 'Report Profit', 'Employee Rollup', 'Transaction Rollup', 'Employee Import Log', 'Machine Downtime', 'Locker Logs', 'Unit and Locker Status', 'Bay Status', 'Projected Ageing', and 'Automated Reports'. A green arrow points from the 'Report' dropdown menu to the 'Machine Checkbook' report.

**YOUR ORGANIZATION**

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

WELCOME - YOUR NAME

Change Password Log Out

QUICK STATUS

Click blank tables to load additional data.

System Health		Dispense Overview	
Total Machines	0	Today	
Machines Offline	0	Yesterday	
Machines Online	0	This Month	
No Recent Dispense	0	Last Month	
Low Product	0	Total Dispenses	
Active Alerts	0	Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sales	
Top Today	
Top This Month	

©2004-2018 VendNovation

**Report Menu:**

- Usage Summary
- Sales by Range
- Inventory Consumption
- Comparative Usage by Time
- Transactions
- Machine Checkbook
- Restock Summary
- Adjustment Summary
- Inventory Totals
- Product Location
- Restock History
- Par Optimization
- Item Turnover Rate
- Inventory Levels
- Temperature Log
- Authentication Errors
- Unsold Product
- Report Profit
- Employee Rollup
- Transaction Rollup
- Employee Import Log
- Machine Downtime
- Locker Logs
- Unit and Locker Status
- Bay Status
- Projected Ageing
- Automated Reports

THEN, CLICK ON  
"MACHINE CHECKBOOK"!

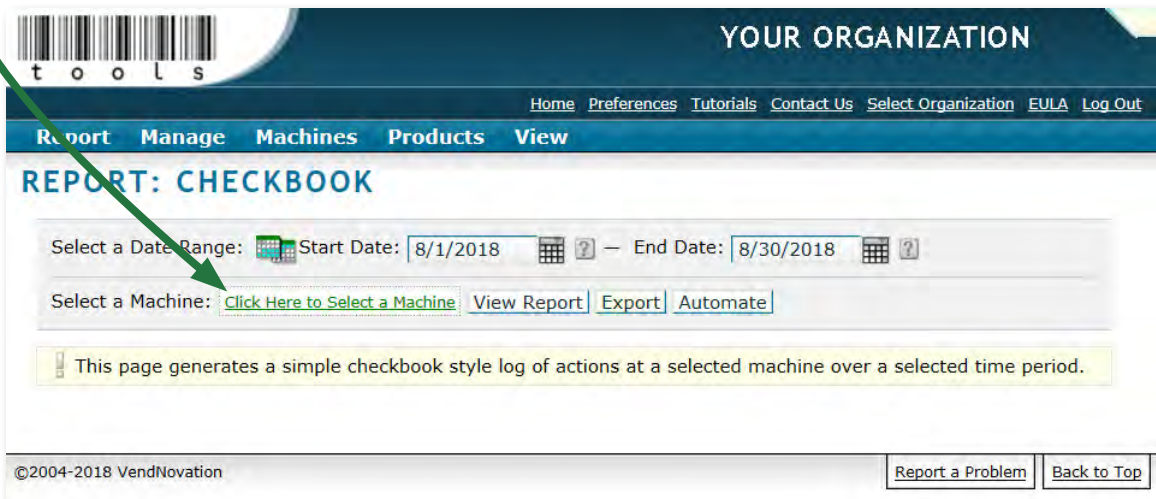


# STATUS CHECKING

by dispensing unit

Open the machine selection panel.

FOLLOW THE  
"CLICK HERE TO SELECT A MACHINE" LINK!



The screenshot shows a web application interface for VendNovation. At the top, there is a dark blue header with the text "YOUR ORGANIZATION" and a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a secondary navigation bar with tabs: Report, Manage, Machines, Products, and View. The main content area is titled "REPORT: CHECKBOOK". It features a date range selector with "Start Date: 8/1/2018" and "End Date: 8/30/2018". Below the date range, there is a "Select a Machine:" field with a link "Click Here to Select a Machine" highlighted by a green arrow. Other buttons in this field include "View Report", "Export", and "Automate". A yellow information box below the field states: "This page generates a simple checkbook style log of actions at a selected machine over a selected time period." At the bottom, there is a footer with "©2004-2018 VendNovation" and two buttons: "Report a Problem" and "Back to Top".

# STATUS CHECKING

by dispensing unit

Select the machine. Entry options appear to the right when selections have been made to the left.

SELECT THE ACCOUNT!

Account	Site	Machine
<b>Your Account</b> Default Account	<b>Your Site</b> Default Site	<b>Test Unit</b> Another Dispensing Unit

THEN, SELECT THE SITE!

FINALLY, SELECT THE MACHINE!

# STATUS CHECKING

by dispensing unit

Perform the search.

CLICK THE "VIEW REPORT" BUTTON.

tools YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

REPORT: CHECKBOOK

Select a Date Range: Start Date: 8/1/2018 — End Date: 8/30/2018

Select a Machine: Your Account - Your Site - Room - Test Unit View Report Export Automate

This page generates a simple checkbook style log of actions at a selected machine over a selected time period.

©2004-2018 VendNoVation Report a Problem Back to Top

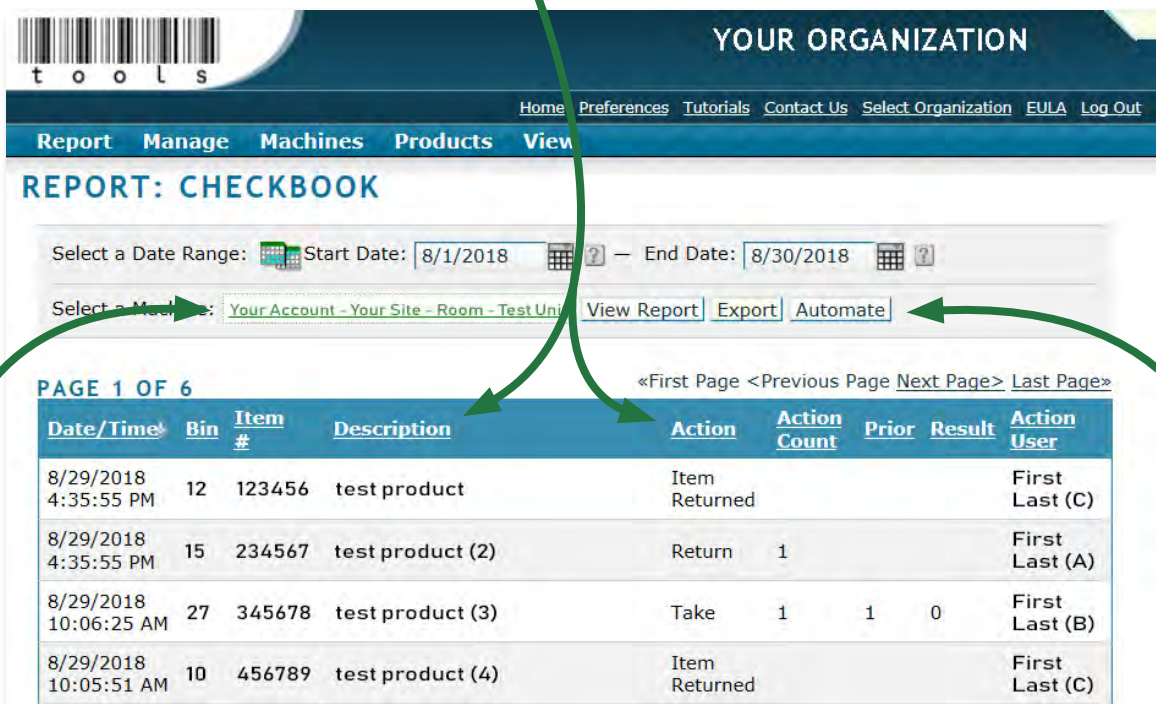
IF NEEDED, NARROW YOUR SEARCH BY  
SELECTING A DATE RANGE!

# STATUS CHECKING

by dispensing unit

This shows every action that has occurred at the selected unit.

WHEN REVIEWING MULTIPLE RESULTS,  
SORT WITH ANY COLUMN HEADER.



The screenshot shows a web application interface for 'YOUR ORGANIZATION'. It includes a navigation bar with links like Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a 'REPORT: CHECKBOOK' section. It features a date range selector (Start Date: 8/1/2018, End Date: 8/30/2018) and a product selection dropdown (Your Account - Your Site - Room - Test Unit). The main content is a table with columns: Date/Time, Bin, Item #, Description, Action, Action Count, Prior, Result, and Action User. The table displays four rows of data for 'test product' actions. Green arrows from the text above point to the date range, the product selection dropdown, and the table headers.

Date/Time	Bin	Item #	Description	Action	Action Count	Prior	Result	Action User
8/29/2018 4:35:55 PM	12	123456	test product	Item Returned				First Last (C)
8/29/2018 4:35:55 PM	15	234567	test product (2)	Return	1			First Last (A)
8/29/2018 10:06:25 AM	27	345678	test product (3)	Take	1	1	0	First Last (B)
8/29/2018 10:05:51 AM	10	456789	test product (4)	Item Returned				First Last (C)

REPEAT YOUR SEARCH FOR AS MANY  
PRODUCTS AS NECESSARY BY  
SELECTING A DIFFERENT PRODUCT!

MOST REPORTS CAN BE  
EXPORTED AS .CSV FILES,  
SOME CAN BE AUTOMATED!



# STATUS CHECKING

by employee

Navigate to the "Employee Rollup" report.

CLICK ON THE "REPORT"  
DROPPDOWN MENU!

The screenshot displays the VendNovation web application interface. At the top, there is a header with a barcode and the text 't o o l s'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar includes 'Report', 'Manage', 'Machines', 'Products', and 'View'. The 'Report' dropdown menu is open, showing a list of reports including 'Usage Summary', 'Sales by Range', 'Inventory Consumption', 'Comparative Usage by Time', 'Transactions', 'Machine Checkbook', 'Restock Summary', 'Adjustment Summary', 'Inventory Totals', 'Product Location', 'Restock History', 'Par Optimization', 'Item Turnover Rate', 'Inventory Levels', 'Temperature Log', 'Authentication Errors', 'Unsold Product', 'Report Profit', 'Employee Rollup', 'Transaction Rollup', 'Employee Import Log', 'Machine Downtime', 'Locker Logs', 'Unit and Locker Status', 'Bay Status', 'Projected Ageing', and 'Automated Reports'. A green arrow points from the 'Report' dropdown menu to the 'Employee Rollup' option.

**YOUR ORGANIZATION**

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

WELCOME - YOUR NAME

Change Password Log Out

QUICK STATUS

Click blank tables to load additional data.

System Health		Dispense Overview	
Total Machines	0	Today	
Machines Offline	0	Yesterday	
Machines Online	0	This Month	
No Recent Dispense	0	Last Month	
Low Product	0	Total Dispenses	
Active Alerts	0	Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sales	
Top Today	
Top This Month	

©2004-2018 VendNovation

- Usage Summary
- Sales by Range
- Inventory Consumption
- Comparative Usage by Time
- Transactions
- Machine Checkbook
- Restock Summary
- Adjustment Summary
- Inventory Totals
- Product Location
- Restock History
- Par Optimization
- Item Turnover Rate
- Inventory Levels
- Temperature Log
- Authentication Errors
- Unsold Product
- Report Profit
- Employee Rollup
- Transaction Rollup
- Employee Import Log
- Machine Downtime
- Locker Logs
- Unit and Locker Status
- Bay Status
- Projected Ageing
- Automated Reports

THEN, CLICK ON  
"EMPLOYEE ROLLUP"!

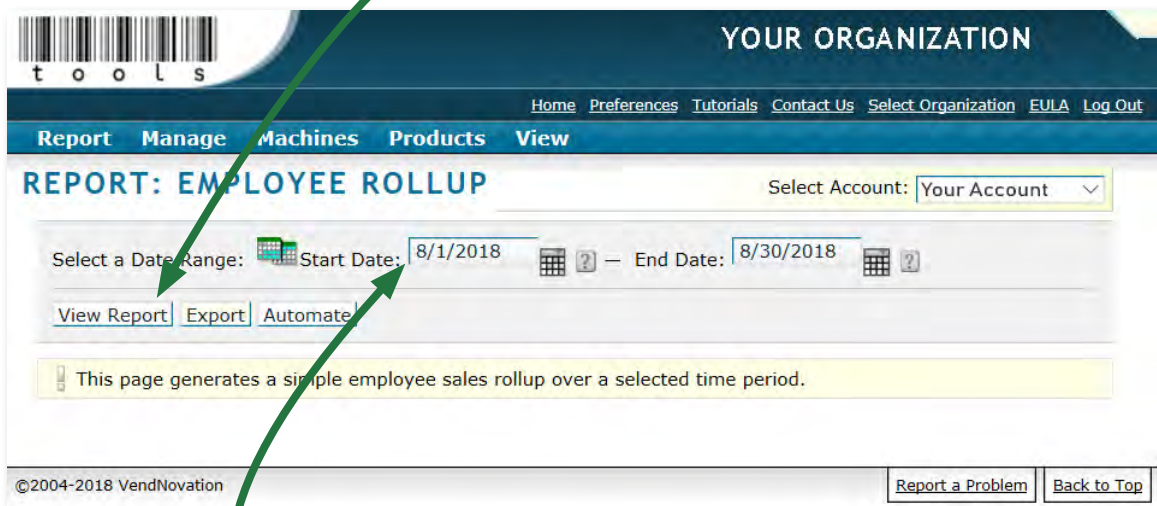


# STATUS CHECKING

by employee

Perform the search.

CLICK THE "VIEW REPORT" BUTTON.



The screenshot shows a web application interface for 'YOUR ORGANIZATION'. At the top left is a barcode and the word 'tools'. The top navigation bar includes links for Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a secondary navigation bar with Report, Manage, Machines, Products, and View. The main heading is 'REPORT: EMPLOYEE ROLLUP'. To the right of this heading is a 'Select Account:' dropdown menu currently set to 'Your Account'. Below the heading, there is a section for 'Select a Date Range:' with 'Start Date:' set to '8/1/2018' and 'End Date:' set to '8/30/2018'. Below the date range are three buttons: 'View Report', 'Export', and 'Automate'. A green arrow points from the text 'CLICK THE "VIEW REPORT" BUTTON.' to the 'View Report' button. Another green arrow points from the text 'IF NEEDED, NARROW YOUR SEARCH BY SELECTING A DATE RANGE!' to the date range fields. Below the buttons is a yellow box with the text: 'This page generates a simple employee sales rollup over a selected time period.' At the bottom left is the copyright notice '©2004-2018 VendNovation'. At the bottom right are two buttons: 'Report a Problem' and 'Back to Top'.

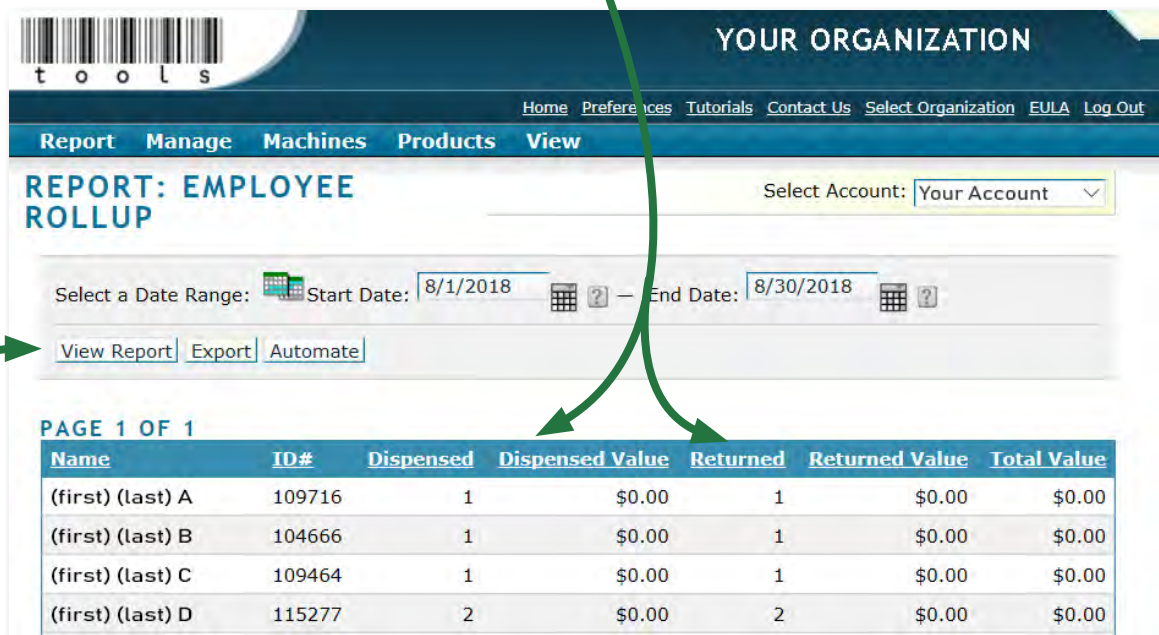
IF NEEDED, NARROW YOUR SEARCH BY  
SELECTING A DATE RANGE!

# STATUS CHECKING

by employee

This shows every action that has occurred at the selected unit.

WHEN REVIEWING MULTIPLE RESULTS,  
SORT WITH ANY COLUMN HEADER.



The screenshot shows a web application interface for 'YOUR ORGANIZATION'. It includes a navigation bar with links like Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a sub-navigation bar with Report, Manage, Machines, Products, and View. The main heading is 'REPORT: EMPLOYEE ROLLUP'. There's a 'Select Account' dropdown set to 'Your Account'. A date range selector shows 'Start Date: 8/1/2018' and 'End Date: 8/30/2018'. Below the date range are buttons for 'View Report', 'Export', and 'Automate'. The table below is titled 'PAGE 1 OF 1' and has columns: Name, ID#, Dispensed, Dispensed Value, Returned, Returned Value, and Total Value. The table contains four rows of data for employees A, B, C, and D.

Name	ID#	Dispensed	Dispensed Value	Returned	Returned Value	Total Value
(first) (last) A	109716	1	\$0.00	1	\$0.00	\$0.00
(first) (last) B	104666	1	\$0.00	1	\$0.00	\$0.00
(first) (last) C	109464	1	\$0.00	1	\$0.00	\$0.00
(first) (last) D	115277	2	\$0.00	2	\$0.00	\$0.00

MOST REPORTS CAN BE  
EXPORTED AS .CSV FILES,  
SOME CAN BE AUTOMATED!

# STATUS CHECKING

by planogram

The "planogram" is the tool that allows you to add and remove products from dispensing units ("machines"), and it allows you to view and adjust inventory level readings for those machines.

CLICK ON THE "MACHINES"  
DROPPDOWN MENU!

The screenshot shows the VendNovation web application interface. At the top, there is a header with a barcode and the word "tools". To the right, it says "YOUR ORGANIZATION". Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. A secondary navigation bar contains the main menu items: Report, Manage, Machines, Products, and View. The "Machines" item is highlighted with a green arrow pointing to it from the text "CLICK ON THE 'MACHINES' DROPPDOWN MENU!". Below the navigation bar, the page says "WELCOME - YOUR NAME" and has links for "Change Password" and "Log Out". A "QUICK STATUS" section follows, with a note: "Click blank tables to load additional data." There are three main data sections: "System Health" with metrics like Total Machines, Machines Offline, Machines Online, No Recent Dispense, Low Product, and Active Alerts; "Dispense Overview" with a table showing dispense counts for Today, Yesterday, This Month, Last Month, Total Dispenses, and Total Value; and "Product Overview" with metrics like Active SKUs, Units In Lockers, Units In Suits, Top Today, and Top This Month. At the bottom left, it says "©2004-2018 VendNovation". A green arrow points from the text "THEN, CLICK ON 'MANAGE MACHINES'!" to a dropdown menu on the right side of the interface. The dropdown menu contains the following options: Restock Report, Manage Machines, Adjust Inventory Levels, Machine Health, and Templates.

System Health	
Total Machines	0
Machines Offline	0
Machines Online	0
No Recent Dispense	0
Low Product	0
Active Alerts	0

Dispense Overview	
Today	
Yesterday	
This Month	
Last Month	
Total Dispenses	
Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Suits	
Top Today	
Top This Month	

©2004-2018 VendNovation

- Restock Report
- Manage Machines
- Adjust Inventory Levels
- Machine Health
- Templates

THEN, CLICK ON  
"MANAGE MACHINES"!



# STATUS CHECKING

by planogram

Navigate to the machines list.

CAN BE EMPTY!

CLICK THE "SEARCH" BUTTON!



# STATUS CHECKING

by planogram

Select the dispensing unit (machine) you are using from the list.

CLICK ANYWHERE ON THIS FIELD!

The screenshot shows the 'MANAGE MACHINES' section of the VendNovation web application. At the top, there's a header with 'YOUR ORGANIZATION' and a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below the navigation bar, there's a sub-header with 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main content area is titled 'MANAGE MACHINES' and contains a 'Find Machines' section with a search bar and a dropdown menu set to 'All Sites'. A green arrow points from the text 'CLICK ANYWHERE ON THIS FIELD!' to the search bar. To the right of the search bar is a 'Search' button. Below the search bar is a table header with columns 'Account Name - Site Name - Machine Name' and a 'locker' button. On the right side, there's an 'Actions' menu with options: Search, Create Machine, Create Locker, Export Visible Planograms, and Export Lockers. The footer contains copyright information '©2004-2018 VendNovation' and links for 'Report a Problem' and 'Back to Top'.

"MACHINES" WILL CONTINUE  
TO REGISTER HERE!

# STATUS CHECKING

by planogram

The "planogram" is the tool that allows you to add and remove products from dispensing units ("machines"), and it allows you to view and adjust the inventory level registry for those machines.

The screenshot shows a web application interface for managing dispensing units. At the top, there's a header with a barcode and the text 't o o l s'. Below it, a navigation bar includes links like 'Home', 'Preferences', 'Tutorials', 'Contact Us', 'Select Organization', 'EULA', and 'Log Out'. A secondary navigation bar has 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main heading is 'MACHINE: YOUR ACCOUNT - YOUR SITE - YOUR LOCKER - YOUR ROOM'. Below this, there's a 'Return to Machine List' button and a 'Create Template' button. The main content area displays a table for machine '35/36 FA281, Camera Locker'. The table has columns for machine ID, product name, alert at, refill at, refill to, rt, currently, and nc. The first row shows a product with ID 123456 and name 'test'. The second row is 'Unassigned' with a 'click here to assign a product' link. The third and fourth rows are also 'Unassigned'. Green arrows point from text labels to specific fields in the table: 'MINIMUM QUANTITY ALLOWED' points to the 'alert at' field, 'MAXIMUM QUANTITY ALLOWED' points to the 'refill at' field, and 'QUANTITY IN LOCATION (COMPARTMENT)! points to the 'currently' field.

35/36 FA281, Camera Locker							
10	123456 test	alert at: 0	refill at: 0	refill to: 0	rt: 0	currently: 0	nc: 0
11	Unassigned click here to assign a product	alert at: 0	refill at: 0	refill to: 0	rt: 0	currently: 0	nc: 0
12	Unassigned click here to assign a product	alert at: 0	refill at: 0	refill to: 0	rt: 0	currently: 0	nc: 0
13	Unassigned click here to assign a product	alert at: 0	refill at: 0	refill to: 0	rt: 0	currently: 0	nc: 0

MINIMUM QUANTITY ALLOWED

MAXIMUM QUANTITY ALLOWED

QUANTITY IN LOCATION (COMPARTMENT)!

## section 6 of 6:

# REMOVING

products

80

employees

84

access

88

For your convenience, the identities of most things (products and employees) are rarely entirely deleted, but easily deactivated.

# REMOVING

## products

Navigate to the "Manage Products" page.

CLICK ON THE "PRODUCTS"  
DROPDOWN MENU!

The screenshot shows the VendNovation dashboard. At the top, there's a 't o o l s' logo with a barcode and a 'YOUR ORGANIZATION' header. Below the header is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. A dropdown menu is open under the 'Products' link, showing options: Manage Products, Site Pricing, Purchase Orders, and Search and Replace. A green arrow points from the 'PRODUCTS' dropdown menu text to the 'Products' link in the navigation bar. Another green arrow points from the 'MANAGE PRODUCTS' text to the 'Manage Products' option in the dropdown menu.

WELCOME - YOUR NAME

QUICK STATUS

Click blank tables to load additional data.

System Health		Dispense Overview	
Total Machines	0	Today	
Machines Offline	0	Yesterday	
Machines Online	0	This Month	
No Recent Dispense	0	Last Month	
Low Product	0	Total Dispenses	
Active Alerts	0	Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Suits	
Top Today	
Top This Month	

©2004-2018 VendNovation

Manage Products  
Site Pricing  
Purchase Orders  
Search and Replace

THEN, CLICK ON  
"MANAGE PRODUCTS"!

# REMOVING

## products

Navigate to the product list.

CLICK ON THE "SEARCH" BUTTON!

The screenshot shows the 'MANAGE PRODUCTS' page in the VendNovation system. At the top, there's a header with 't o o l s' and a barcode. Below that, a navigation bar includes 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main section is titled 'MANAGE PRODUCTS' and features a search bar with the placeholder text 'Find a Product, Group, or Supplier:'. The search bar has a 'Search' button and a 'Filter By...' dropdown. Below the search bar, there's a note: 'Begin by Searching Above. By default we locate Products based on Item Number, Suppliers and Products Groups based on Name. To see all Products, type **products**. To see all Product Groups, type **groups**. To see all Suppliers, type **suppliers**.' To the right of the search bar is an 'Actions' menu with various options like 'Create Product', 'Create Group', 'Create Supplier', 'Site Pricing', 'Group Assignment', 'Supplier Assignment', 'Batch Update Product Permissions', 'Import Products', 'Import Site Pricing', 'Export Product List', 'Export Locker Menu', 'Restore Deleted Products', and 'About Products'. At the bottom, there's a footer with '©2004-2018 VendNovation' and links for 'Report a Problem' and 'Back to Top'.

CAN BE BLANK!



# REMOVING

## products

Select the product you would like to remove.

CLICK ANYWHERE ON THE PRODUCT FIELD!

The screenshot shows a web application interface for managing products. At the top, there is a header with a barcode and the text 't o o l s'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, EULA, and Log Out. The main navigation bar includes 'Report', 'Manage', 'Machines', 'Products', and 'View'. The 'Products' section is active, displaying 'MANAGE PRODUCTS'. A search bar is present with the text 'Find a Product, Group, or Supplier:'. Below the search bar, a list of products is shown. The first product is '123456 test product x1'. A green arrow points from the text 'CLICK ANYWHERE ON THE PRODUCT FIELD!' to the product list. Another green arrow points from the text 'SELECT THE PRODUCT YOU WOULD LIKE TO REMOVE.' to the product list. A third green arrow points from the text 'PRODUCTS WILL CONTINUE TO REGISTER HERE!' to the product list. On the right side, there is an 'Actions' menu with various options: Search, Create Product, Create Group, Create Supplier, Site Pricing, Group Assignment, Supplier Assignment, Batch Update Product Permissions, Import Products, Import Site Pricing, Export Product List, Export Locker Menu, Restore Deleted Products, and About Products.

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us EULA Log Out

Report Manage Machines Products View

MANAGE PRODUCTS

Find a Product, Group, or Supplier:

Search Filter By...

123456 test product x1

137379 Product

Actions

- Search
- Create Product
- Create Group
- Create Supplier
- Site Pricing
- Group Assignment
- Supplier Assignment
- Batch Update Product Permissions
- Import Products
- Import Site Pricing
- Export Product List
- Export Locker Menu
- Restore Deleted Products
- About Products

"PRODUCTS" WILL CONTINUE TO REGISTER HERE!

# REMOVING

## products

Remove the product.

CLICK ON THE "REMOVE PRODUCT" BUTTON!

The screenshot shows the 'Edit Product' interface. At the top, there's a 'YOUR ORGANIZATION' header with navigation links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a main navigation bar with 'Report', 'Manage', 'Machines', 'Products', and 'View'. The 'MANAGE PRODUCTS' section is active, showing the 'Edit Product' form. The form has two columns of fields. The left column includes: Manufacturer (test), Item Number (123456), Package Quantity (1), Cost Per Item (\$) (0.00), Product Group (Default Group), Custom History Field 1, Custom History Field 2, Custom Field 1, Custom Field 2, and Barcode/UPC. The right column includes: Manufacturer Item Number (test), Description (test product), Price Per Item (\$) (0.00), Package (\$0.00), Size (Coil), Product Supplier (Unassigned), and checkboxes for 'Require Dual Validation', 'Allow Offline Dispensing', and 'Returnable'. At the bottom of the form are buttons for 'Remove Product', 'Generate Reprint', 'Cancel', and 'Save'. A green arrow points from the text 'CLICK ON THE "REMOVE PRODUCT" BUTTON!' to the 'Remove Product' button. To the right of the form is an 'Actions' sidebar with a 'Search' section and a list of actions: Create Product, Create Group, Create Supplier, Site Pricing, Group Assignment, Supplier Assignment, Batch Update Product Permissions, Import Products, Import Site Pricing, Export Product List, Export Locker Menu, Restore Deleted Products, and About Products. The footer contains copyright information '©2004-2018 VendNovation' and links for 'Report a Problem' and 'Back to Top'.

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MANAGE PRODUCTS

**Edit Product**

Manufacturer: test  
Item Number: 123456  
Package Quantity: 1  
Cost Per Item (\$): 0.00  
Product Group: Default Group  
Custom History Field 1  
Custom History Field 2  
Custom Field 1  
Custom Field 2  
Barcode/UPC

Manufacturer Item Number: test  
Description: test product  
Price Per Item (\$): 0.00  
Package: \$0.00  
Size: Coil  
Product Supplier: Unassigned  
☐ Require Dual Validation  
☐ Allow Offline Dispensing  
☐ Returnable

**Actions**

Search

- Create Product
- Create Group
- Create Supplier
- Site Pricing
- Group Assignment
- Supplier Assignment
- Batch Update Product Permissions
- Import Products
- Import Site Pricing
- Export Product List
- Export Locker Menu
- Restore Deleted Products
- About Products

Remove Product Generate Reprint Cancel Save

©2004-2018 VendNovation Report a Problem Back to Top

# REMOVING

## employees

The software refers to all administration, faculty, staff, and students as "employees". This method of adding employees uses a .CSV file to upload a batch of identities at one time.

CLICK ON THE "MANAGE"  
DROPPDOWN MENU!

The screenshot shows the VendNovation software interface. At the top, there is a header with a barcode and the text "t o o l s". To the right, it says "YOUR ORGANIZATION". Below the header, there is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar has tabs: Report, Manage, Machines, Products, and View. The "Manage" tab is selected, and a dropdown menu is open, showing the following options: Accounts, Sites, Users, Alert Routing, Supply Rooms, Employees, Employee Badges, Allocation Codes, Shift Definitions, Restriction Exceptions, and Restriction Check. The main content area displays a welcome message "WELCOME - YOUR NAME" and a "QUICK STATUS" section. The "QUICK STATUS" section includes a message "Click blank tables to load additional data." and two tables: "System Health" and "Dispense Overview". The "System Health" table has rows for Total Machines, Machines Offline, Machines Online, No Recent Dispense, Low Product, and Active Alerts, all with a value of 0. The "Dispense Overview" table has rows for Today, Yesterday, This Month, Last Month, Total Dispenses, and Total Value. The "Product Overview" section is also visible, showing rows for Active SKUs, Units In Lockers, Units In Sites, Top Today, and Top This Month. A green arrow points from the "MANAGE" dropdown menu to the "EMPLOYEES" option.

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

WELCOME - YOUR NAME

Change Password  
Log Out

QUICK STATUS

Click blank tables to load additional data.

System Health	
Total Machines	0
Machines Offline	0
Machines Online	0
No Recent Dispense	0
Low Product	0
Active Alerts	0

Dispense Overview	
Today	
Yesterday	
This Month	
Last Month	
Total Dispenses	
Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sites	
Top Today	
Top This Month	

Accounts  
Sites  
Users  
Alert Routing  
Supply Rooms  
Employees  
Employee Badges  
Allocation Codes  
Shift Definitions  
Restriction Exceptions  
Restriction Check

THEN, CLICK ON  
"EMPLOYEES"!

# REMOVING

## employees

Select the appropriate account for the unit the employee is using.

CLICK ON THE "ACCOUNT"  
DROPPDOWN MENU!

The screenshot shows the 'MANAGE: EMPLOYEES' page in the VendNovation system. At the top, there is a 't o o l s' section with a barcode and a 'YOUR ORGANIZATION' header. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar includes Report, Manage, Machines, Products, and View. The page title is 'MANAGE: EMPLOYEES'. Below the title, there is a form with an 'Account:' label and a dropdown menu. The dropdown menu is open, showing three options: 'Select an account', 'Your Account', and 'Org Default Account'. A green arrow points from the text 'CLICK ON THE "ACCOUNT" DROPPDOWN MENU!' to the dropdown menu. Another green arrow points from the text 'THEN, CLICK ON THE ACCOUNT FOR THE DISPENSING UNIT THE EMPLOYEE IS USING!' to the 'Your Account' option in the dropdown menu. The footer of the page includes the copyright notice '©2004-2018 VendNovation' and two buttons: 'Report a Problem' and 'Back to Top'.

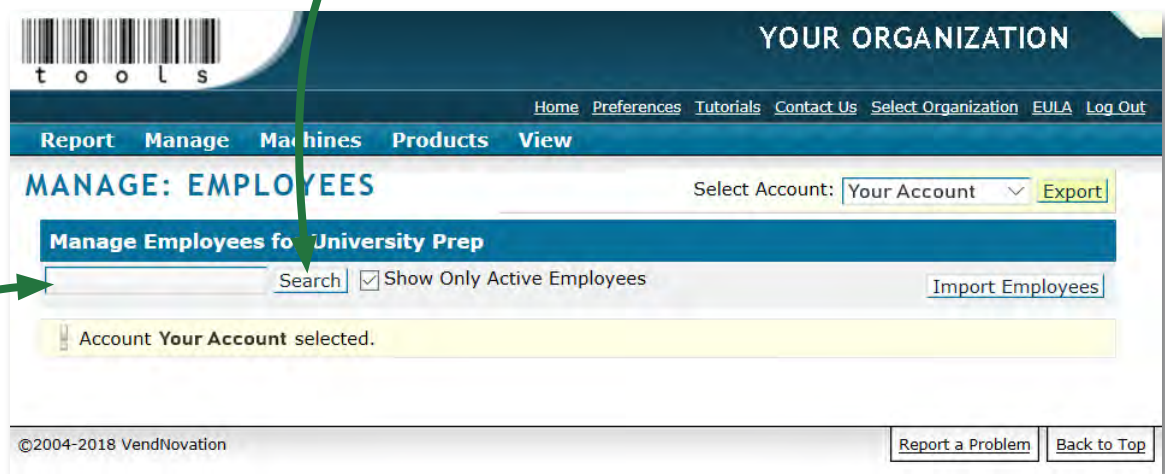
THEN, CLICK ON THE ACCOUNT  
FOR THE DISPENSING UNIT THE  
EMPLOYEE IS USING!

# REMOVING

## employees

Navigate to the employee list.

CLICK ON THE "SEARCH" BUTTON!



The screenshot shows the 'Manage Employees' page in the VendNovation system. At the top, there's a 'tools' section with a barcode and a 'YOUR ORGANIZATION' header. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main section is titled 'MANAGE: EMPLOYEES' and includes a 'Select Account' dropdown menu set to 'Your Account' with an 'Export' button. Below this is a sub-header 'Manage Employees for University Prep'. The main content area features a search input field, a 'Search' button, a checkbox for 'Show Only Active Employees', and an 'Import Employees' button. A yellow message box states 'Account Your Account selected.' At the bottom, there's a footer with '©2004-2018 VendNovation' and links for 'Report a Problem' and 'Back to Top'. Two green arrows are present: one points from the text 'CLICK ON THE "SEARCH" BUTTON!' to the 'Search' button, and another points from the text 'CAN BE BLANK!' to the search input field.

CAN BE BLANK!



# REMOVING

## employees

Disable the employee.

CLICK ON THE GREEN BUTTON!

The screenshot shows a web application interface for managing employees. At the top, there's a 'YOUR ORGANIZATION' header with navigation links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a 'Report Manage Machines Products View' menu. The main section is titled 'MANAGE: EMPLOYEES' and includes a 'Select Account: Your Account' dropdown and an 'Export' button. A search bar is present with a 'Search' button and a checkbox for 'Show Only Active Employees'. An 'Import Employees' button is also visible. The table below shows 'PAGE 1 OF 1' and lists employee details. A green arrow points from the text 'CLICK ON THE GREEN BUTTON!' to a green button in the table row for the employee with ID 123456. A tooltip message 'Disable this Employee' appears upon hovering over the green button.

Edit	Last Name ↑	First Name	Employee #	Badge #	Language	Pin
<a href="#">Insert</a>	<<--Click Add to Add a New Account.					
<a href="#">Edit</a>	(last) A	(first)	123456		English	<a href="#">Clear</a> <a href="#">Pin</a> <a href="#">Disable this Employee</a>

THIS MESSAGE APPEARS UPON HOVER!

REMINDER - THIS PROCESS  
IS THE SAME FOR ALL  
IDENTITIES, INCLUDING:  
ADMINISTRATION, FACULTY,  
STAFF, AND STUDENTS.

# REMOVING

## access

This section assumes that you have used "Allocation Codes" to assign specific privileges to specific "Employees". The software does not require the use of allocation codes. If you have not used allocation codes, this subsection is unnecessary.

CLICK ON THE "MANAGE" DROPPDOWN MENU!

The screenshot shows the VendNovation software interface. At the top, there is a header with a barcode and the text "t o o l s". Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main navigation bar includes "Report", "Manage", "Machines", "Products", and "View". The "Manage" dropdown menu is open, showing a list of options: Accounts, Sites, Users, Alert Routing, Supply Rooms, Employees, Employee Badges, Allocation Codes, Shift Definitions, Restriction Exceptions, and Restriction Check. The "Allocation Codes" option is highlighted. The main content area displays "WELCOME - YOUR NAME" and "QUICK STATUS" with a message: "Click blank tables to load additional data." Below this are two tables: "System Health" and "Dispense Overview". The "System Health" table has columns for "Metric" and "Value", with rows for Total Machines, Machines Offline, Machines Online, No Recent Dispense, Low Product, and Active Alerts. The "Dispense Overview" table has columns for "Period" and "Value", with rows for Today, Yesterday, This Month, Last Month, Total Disposes, and Total Value. A "Product Overview" table is also visible, with columns for "Metric" and "Value", and rows for Active SKUs, Units In Lockers, Units In Sites, Top Today, and Top This Month. The footer shows the copyright notice: ©2004-2018 VendNovation.

System Health	
Total Machines	0
Machines Offline	0
Machines Online	0
No Recent Dispense	0
Low Product	0
Active Alerts	0

Dispense Overview	
Today	
Yesterday	
This Month	
Last Month	
Total Disposes	
Total Value	

Product Overview	
Active SKUs	
Units In Lockers	
Units In Sites	
Top Today	
Top This Month	

- Accounts
- Sites
- Users
- Alert Routing
- Supply Rooms
- Employees
- Employee Badges
- Allocation Codes**
- Shift Definitions
- Restriction Exceptions
- Restriction Check

THEN, CLICK ON "ALLOCATION CODES"!

# REMOVING

access

Select the appropriate account for the unit the employee is using.

CLICK ON THE "ACCOUNT"  
DROPPDOWN MENU!

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MANAGE: ALLOCATION CODES

Account: Select an account ▼

Select an account.

©2004-2018 VendNovation

Select an account  
Your Account  
Org Default Account

Report a Problem Back to Top

THEN, CLICK ON THE ACCOUNT  
FOR THE DISPENSING UNIT THE  
EMPLOYEE IS USING.

# REMOVING

access

Navigate to the Allocation Code Name list.

The screenshot shows the 'MANAGE: ALLOCATION CODES' page in the VendNovation system. At the top, there's a 'YOUR ORGANIZATION' header with a 'tools' logo and a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. Below this is a sub-header with 'Report', 'Manage', 'Machines', 'Products', and 'View'. The main title is 'MANAGE: ALLOCATION CODES' with an 'Account: Your Account' dropdown. A table lists allocation codes with columns: Edit, Allocation Code Name, Prompt Text, and Employees can... The first row is 'Test Unit' with a green arrow pointing to its 'Edit' button. Below the table are sections for 'OTHER SETTINGS' (with a checkbox for 'Enter Employee PIN at Machine') and 'IMPORT & EXPORT TOOLS' (with buttons for 'Import Allocation Code Units', 'Import Restrictions', and 'Export Restrictions'). The footer contains copyright information and links for 'Report a Problem' and 'Back to Top'.

CLICK ON THE DOWN ARROW BUTTON!

# REMOVING

access

Change the access restrictions on the employees for the appropriate identity within the grouping.

FOLLOW THE "EMPLOYEES" LINK!

The screenshot shows a web application interface for managing allocation codes. At the top, there's a header with a barcode and the text 'tools'. Below this is a navigation bar with links: Home, Preferences, Tutorials, Contact Us, Select Organization, EULA, and Log Out. The main section is titled 'MANAGE: ALLOCATION CODES' and includes a search bar and a 'Bulk Import Test Unit' button. A table titled 'Test Unit at Your Account' lists various test units. Each row in the table has a 'Name' and 'Number' column, followed by a series of links: 'Employees', 'Bulk Assign Employees', 'Product Restrictions', and 'Group Restrictions'. A green arrow points from the text 'FOLLOW THE "EMPLOYEES" LINK!' to the 'Employees' link in the row for test unit 38.

Name:	Number:	Create New Test Unit
32	32	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
33	33	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
34	34	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
35	35	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
37	37	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
38	38	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
39	39	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
40	40	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>
Admin	Admin	<a href="#">Employees</a> · <a href="#">Bulk Assign Employees</a> · <a href="#">Product Restrictions</a> · <a href="#">Group Restrictions</a>



# REMOVING

## access

Remove the employees who are not allowed to access the unit.

TO REMOVE AN EMPLOYEE'S ACCESS  
CLICK THE "REMOVE FROM" LINK!

YOUR ORGANIZATION

Home Preferences Tutorials Contact Us Select Organization EULA Log Out

Report Manage Machines Products View

MANAGE: ALLOCATION CODES

Up to Code List Back to Test Unit List

Search Page 1 Test Unit : 10

Employees Bulk Assign Employees Product Restrictions Group Restrictions Bulk Import Restrictions

**Employees at Test Unit**

A (last), Employee (first)	000001	21	Move to 38
B (last), Employee (first)	000010	38	Remove from 38
C (last), Employee (first)	000100		Move to 38
D (last), Employee (first)	001000		Move to 38
E (last), Employee (first)	010000		Move to 38
F (last), Employee (first)	100000		Move to 38
G (last), Employee (first)	100001	28	Move to 38
H (last), Employee (first)	100010		Move to 38

WHEN DONE, CLICK ON THE "BACK TO  
[ALLOCATION CODE] LIST" LINK!