Setup & Application Guide

Preliminary

PN 4224492

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Greenlite Equipment Installation

The Greenlite *Equipment hardware must be installed* ***first.***

Questions? **See http://www.greenlitevending.com/support/ documents and videos or call Vendnet Technical Support at 800-833-4411.**

- **Factory installed Greenlite Equipment** only requires the installation of the antenna on top of the machine. **Please read the instructions included in the machine first** before mounting the antenna to machine and connecting the antenna wire to the Greenlite Telemetry Device.
- **For installing Greenlite Equipment as a field install kit** it is important that each vending machine is installed with a Greenlite telemetry device, card reader, antenna, and required cables and accessories . ***Please read all included instructions first,*** then follow these instructions carefully.

After the installation process is completed at each machine, on the next machine power up, the system ***automatically assigns an Asset ID (a generic number) to each machine.*** Then the person that installed the device should fill out the provided ***Installation Recording Worksheet*** and record ***the ID number of the Greenlite Device*** for each machine. The Greenlite Device ID is located on the white barcode label of the Greenlite Telemetry Device. **You will need the Greenlite Device ID, machine serial number along with the customer and location information to set up your Greenlite website database of machines and to assign each machine to a customer site.**

Greenlite Equipment Activation

Very Important: ***With the Greenlite solution, Cantaloupe Systems is the cashless payment Merchant Of Record. This means all the funds from machine product sales, minus fees, are deposited directly to a bank account designated by you from Cantaloupe Systems, the payment processor. There are several easy to complete forms that must be completed and submitted at the time of the either the initial machine order or field install kit order that must be set up to enable funds to be routed to your account and for the Greenlite Equipment to be activated. Please make sure the Greenlite Subscription and Merchant Account forms were processed and a website login has been received.***

Greenlite Equipment And Software Application Overview

1. ***Greenlite Equipment*** refers to the Greenlite telemetry device, card reader, antenna, and required cables and accessories. Machine data is collected and transmitted by the Greenlite telemetry device installed in your vending machine. This data includes cash and cashless transactions, machine alerts and individual product sales to the Greenlite Website server.
2. ***Greenlite*** is a vending data and cashless payment service utilizing an internet server based website application, which can be accessed on any desktop, laptop, tablet and mobile phone device with an internet browser, such as Internet Explorer, Chrome, Firefox, Safari and others. The Greenlite website acts as the "host system" and operator interface for all data collected and transmitted by the Greenlite telemetry devices installed in your vending machines, providing complete data on all recorded cashless transactions, sorted by individual machine and by customer site.

   Greenlite is designed to manage and record *cashless sales* for the machines in which Greenlite Devices have been installed.

   Greenlite ***Data*** (optional) provides additional features for managing your business:

   - *Cash sales* in addition to your cashless sales totals from the machines equipped with Greenlite telemetry devices.

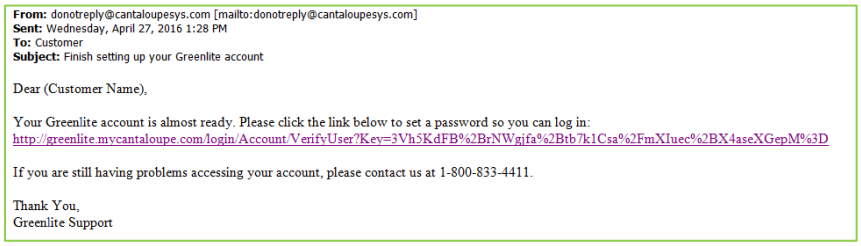
- *Alerts* and email and phone text *Notifications,* to inform you as soon as possible and help you detect and solve problems at your Greenlite machines.
- *Item Database* lists all products used or can be used in the machine
- *Machine Planogramming functions* to help with desirable product marketing and pre-picking of machine restock requirements.

To Begin: Introduction

Note: This document uses visual examples and text covering both ***Greenlite*** and ***Greenlite Data***. Website options may vary based on what option you've elected to purchase.

The Greenlite application is accessed via your internet browser at http://greenlite.mycantaloupe.com.

Your company should have received an email from donotreply@Cantaloupesys.com containing a web link to setup your initial password to our Greenlite website.



From: donotreply@cantaloupesys.com [mailto:donotreply@cantaloupesys.com]
Sent: Wednesday, April 27, 2016 1:28 PM
To: Customer
Subject: Finish setting up your Greenlite account

Dear (Customer Name),

Your Greenlite account is almost ready. Please click the link below to set a password so you can log in:
http://greenlite.mycantaloupe.com/login/Account/VerifyUser?Key=3Vh5KdFB%2BrNWgjfa%2Btb7k1Csa%2FmXIuec%2BX4aseXGepM%3D

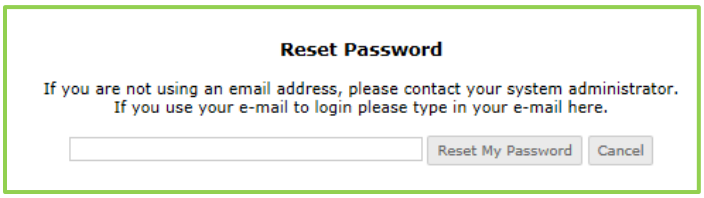
If you are still having problems accessing your account, please contact us at 1-800-833-4411.

Thank You,
Greenlite Support

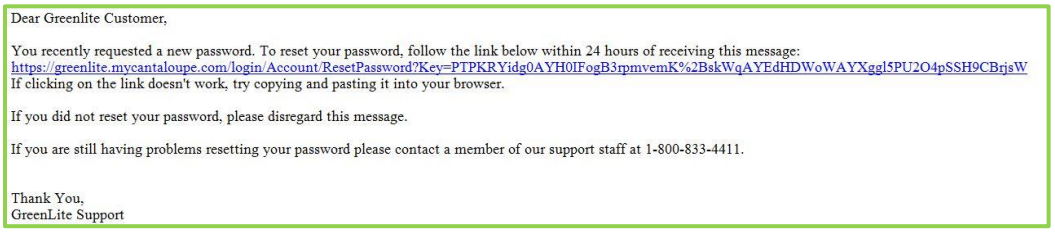
- At your computer or mobile device, either open your browser and copy/paste the link in the URL field at the top of your web browser or simply click on the web link in the email. This takes you to the initial login screen shown below where you will type in your own password and re-enter the same password to confirm it. Then click the finish button.

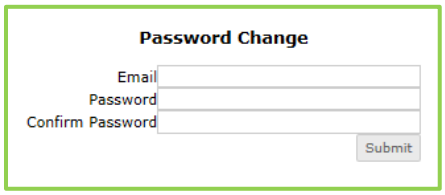
Note that in the future if you ever forget your password or need to reset your password you can visit your login page at http://greenlite.mycantaloupe.com and click on the "Forgot your password?" link at the bottom of the login screen.

- You will be redirected to a Reset Password screen to enter your email address.
- A password reset email will be sent to the email address on file.
-

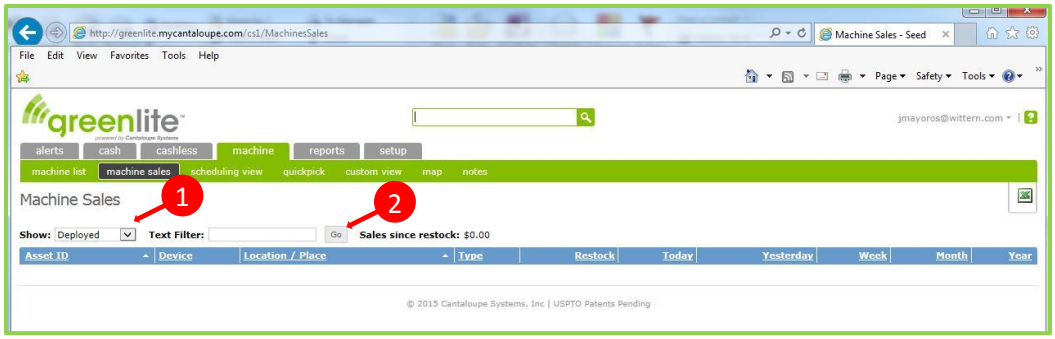


Click the link in the reset password email and it will take you to the Password Reset screen where you can enter your new password. You can then continue to the login screen where you can finish logging in.





- Login by entering your User Name (In most cases your email that the account is registered to), and your new password.
- On login you will be presented with the **Machine Sales** screen:



Note: At first this screen will appear blank until you change the “Show” drop down tab from “Deployed” to “All” and press the “Go” Button.

Greenlite Website Organization

Alerts: Various types of problems detected by the system will prompt an *alert* that will be displayed onscreen when this tab is selected. For Greenlite Cashless customers, check for alerts on a regular basis. For Greenlite Data customers, you have the option to have notifications sent to you via email or mobile phone text message of an alert. ***(Greenlite Data feature only)***

Cash: *(Greenlite Data feature)* Track cash sales and related cash tracking information for coins and bills.

Cashless: Cashless sales data recorded by your newly installed Greenlite Cashless Equipment is accessed via this tab.

Machine: Provides access to a list of the machines entered into the application (i.e., your machines that have been equipped with Greenlite Cashless Equipment), plus data regarding machine sales, etc.

Reports: Provides access to a Report Writer that allows you to specify and generate a variety of reports.

Setup: For setting up the system for the first time, and also whenever you make additions to your system (new machines, customers, etc.).

Note that clicking on the Greenlite Icon in the upper left corner of the page will return you to the home page.

Setup

We will look at the Setup tab first:

Before the system can be fully operational, we recommend that you proceed in the following order:

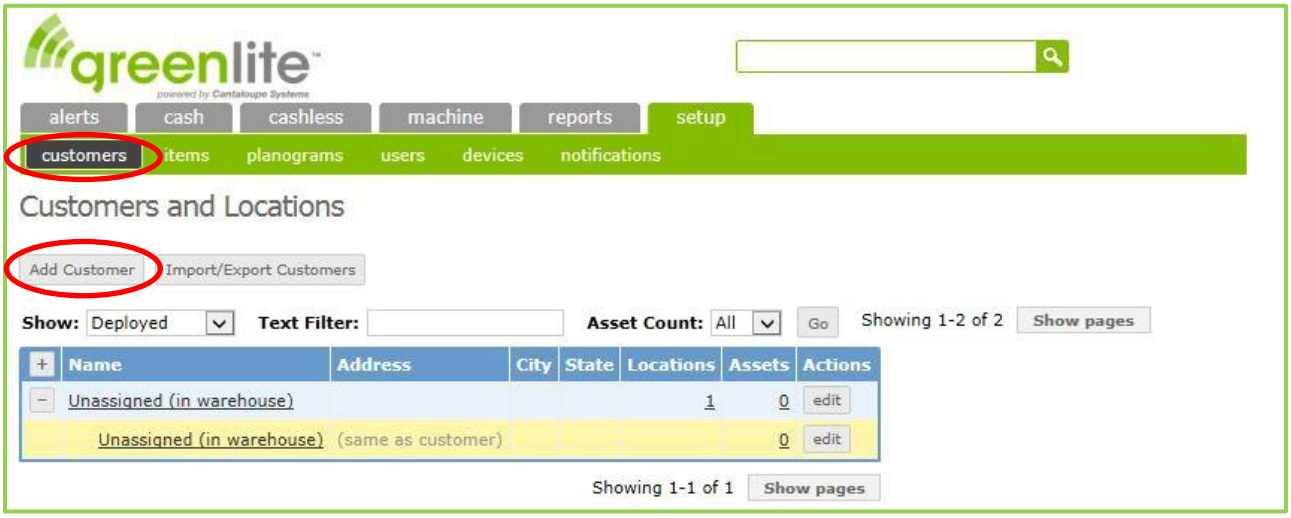
- **Customers:** Your Greenlite Device-equipped vending machines must be set up as ***assets*** assigned to a customer location. This will allow you to view and understand tabulated sales information at a quick glance. Another key feature is ***Deployment.*** When a machine is placed at a customer location marking it as ***Deployed*** allows you to view the tabulated sales data of the machines at the location.
- **Items:** Products used in your vending business can be added to your website on this tab, including: product names, product UPC codes, manufacturers and product type. In order to classify products correctly as they are entered, choose from the list of product manufacturers and list of product type groups when entering products.
- **Planograms:** A Planogram lists all the products for sale in a machine by Coil (selection) number. Planograming machines will allow you to track product sales by item and their customer desirability. Also, using the ***QuickPick*** feature *(Greenlite Data Users Only)* your delivery trucks can be loaded with only the products needed at each machine.
- **Users:** *(Available only in Greenlite Data)* You can set up company personnel, plus any other persons allowed access to your system, as ***users***. While not every company employee needs to be entered, you should include the office personnel who will be *operating the system.*
- **Devices:** The Greenlite Telemetry Device connects the vending machine to the wireless cellular telephone network, the Greenlite website, and the cashless payment processors. Each device has a unique 6 digit serial number listed on the front of the unit along with a barcode. A serial number for each Greenlite Telemetry device must be assigned to a specific vending machine. The Greenlite service is then activated and and monitored for each specific machine. The Greenlite device itself is an orange box with a row of LED lights and a red and a black button.

- **Notifications*:*** *(Greenlite Data Users Only).* Set up ***notifications*** to send out text and/or email messages when certain problems occur.

Set Up Machines and Customer Sites

Click the <Setup> tab to start creating a database of the customers and machines where you have just installed or will install the Greenlite Equipment.

- Click on the "Customers" option. This will bring up the screen headed "Customers and Locations"
- Here you will set up each machine by assigning it to a customer site.
  - **Note:** Your machines with newly-installed Greenlite Equipment are initially listed as "Unassigned (in warehouse)," and categorized as "not deployed."
    The first step is to create an entry for each customer where Greenlite Devices have been installed in one or more machines, and then to reassign each machine from the warehouse to the appropriate customer.



Customer Setup

Click the <Add Customer> button just below the Customers and Locations" heading (circled above) to bring up the "Create a Customer" screen:

In Greenlite, a ***Customer*** is defined as an entity with which you have an arrangement to place vending machines on its premises. A Customer may maintain one or more ***Locations*** at which machines are placed.

Only the Name, Address, City, State and Start Date fields must be completed for each new Customer added to the system.

- **Name** *(Required)*: Type in the ***Name*** of a customer for whom you're setting up Greenlite.
- **Code** *(Optional)*: Entry of an ID code is *not required*; Greenlite tracks customers by the Name entered at the previous field.
  - If your company already uses ID codes for customers/ accounts, you can use the existing codes from that system.
  - If you wish to institute a system of Customer ID Codes, we suggest that each code start with *one letter,* the first initial of the company name, followed by a number. This will allow a list sorted by Code to be in (rough) alphabetical order by name.
- **Address** *(Required)*: Enter the customer's street address.
  - If this customer maintains more than one vending location, enter their *billing address,* normally the main/home office, here as the main Customer Address.
- **City** *(Required)*: Enter the city for this address.
- **State** *(Required)*: Select the state for this address from the dropdown box at this field.

- **Zip** *(Optional)*: Enter the zip code (or, outside the US, the appropriate postal code).
- **Country:** <United States> is selected by default. If necessary, change this entry by making a different selection from the dropdown box.
- **Phone** *(Optional)*
- **Fax** *(Optional)*
- **Email** *(Optional)*
- **Create Location:** This field should remain set to its default option, "Yes, create location at this address."
- **Sales Person:** *(Not used in Greenlite)*
- **Account Manager:** *(Not used in Greenlite)*
- **Start Date:** *(Required)*
- **End Date:** *(Not used in Greenlite)*
- **Description** *(Optional)*: Use this field to write in any pertinent information about this customer.

Click the <Save> button. You will be returned to the previous screen, the "Customers and Locations" list. Your newly created customer should appear on the list in alphanumeric order.

- If this customer (like many vending customers) maintains ***only one location*** where your vending machines are placed, this completes entry of that customer.
- If this customer maintains ***multiple vending locations,*** you will need to set up one or more additional locations for the customer before proceeding. See the next section, ***Location Setup.***

When you've completed entering a customer (with or without additional locations), you may *either:*

- Click <add customer> to start setting up the next customer, *or*
- Proceed directly to the ***Edit Machine(Asset) Records*** section (below) to link the appropriate machines to your newly added customer.

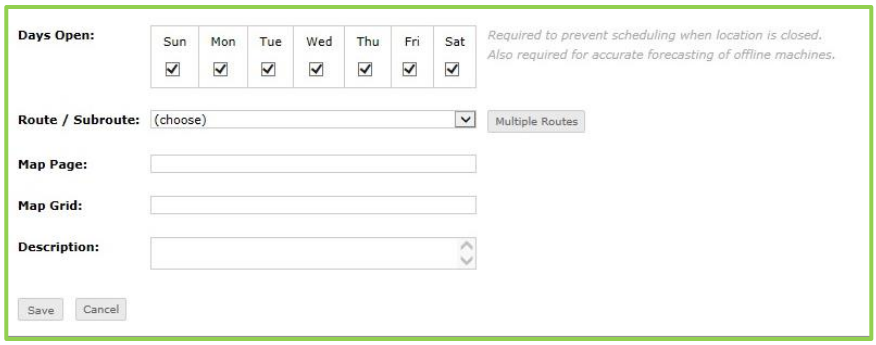
Location Setup

For any customer with one or more additional vending locations in addition to the customer's "main" location, you will need to *create the additional location(s)* before you can start placing machines.

Click the <Add Location> button on the line (row) representing your newly-added Customer. This will bring up a Location Entry screen:

- **Customer** *(Displayed)*: The customer selected at the previous screen (on the row where you clicked the "Add Location" button) is selected by default. *Leave this entry as-is* while you enter each of this customer's additional locations.
- **Name** *(Required)*: Enter a clear description for this location within the customer's premises; for example, "2d floor," "234 5th Street," "lunchroom," etc.
- **Code:** *(Optional)*: Just as for Customer entry, the field for Code does not require an entry. If you are running a vending management system that includes Location ID codes, you may wish to enter the appropriate code for this customer location, as set up in your existing system.
- **Address** *(Required)*: Enter this location's street address.
- **City** *(Required)*: Enter the city for this address.
- **State** *(Required)*: Select the state for this address from the dropdown box at this field.
- **Zip** *(Optional)*: Enter the zip code (or, outside the US, the appropriate postal code).
- **Country:** <United States> is selected by default. If necessary, change this entry by making a different selection from the dropdown box.
- **Phone** *(Optional)*
- **Fax** *(Optional)*
- **Email** *(Optional)*

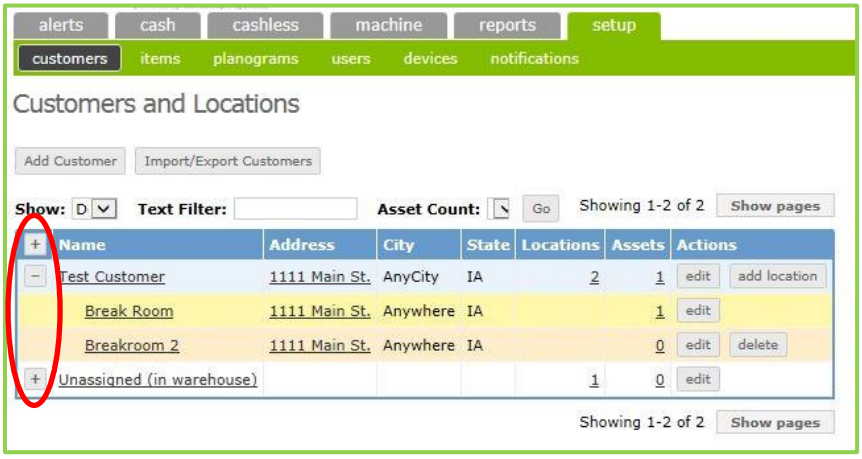
The next illustration shows the bottom area of the Create Location *screen, revealed when you scroll down, which contains the rest of the fields for location entry: Only the* Description *field is used. The Days Open, Route/Subroute, Map Page and Map Grid fields are features not used in Greenlite.)*



- **Days Open** *(Scheduling feature not used in Greenlite)*
- **Route / Subroute** This should be set to Greenlite Data (*Your Name* Warehouse (0).
- **Map Page** *(Not used in Greenlite)*
- **Map Grid** *(Not used in Greenlite)*
- **Description** *(Optional)*: Use this field to write in any pertinent information about this location such as hours of accessibility to service machines

Click <Save> at the lower left to save the location and return to the ***Customers and Locations*** listing screen.

Click the ***plus-sign icon*** in the left-hand column on the line representing the customer for which you just added a location. (The plus sign changes to a minus sign so you can switch back.) An indented list of the customer's assigned locations will appear:



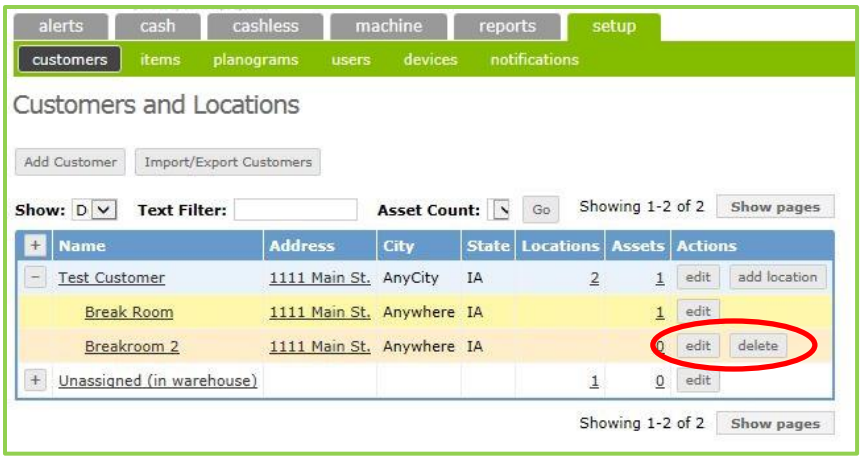
To add another location, simply click <Add Location> on the row listing the appropriate customer and repeat the above steps.

Each time you complete setup of a customer or a location and click <Save>, the familiar ***Customers and Locations*** listing screen will reappear. Repeat the procedure for the next customer.

Once you've set up all the customers and locations where you have installed Greenlite Equipment in your vending machines, it's time to link each new cashless machine to the appropriate customer/location.

Editing/Deleting Locations

Once a customer and location have been created and a machine has been associated with the location, there is history data associated with that location but if you wish to delete a location or customer or edit the information you may click on the Edit or Delete buttons in the Actions column.



Edit Machine (Asset) Records

An entry of each newly cashless-equipped vending machine was created as soon as the Greenlite Device was installed and began transmitting data.

This means that you do not have to *create* new entries for your cashless machines as assets in Greenlite, but you do need to *update* each new asset record with an appropriate *Asset ID,* the correct *customer assignment*, and some additional information.

- When the Asset was created, the system automatically assigned it an *Asset ID.* Most companies will want to *change the auto-assigned Asset IDs* of all the newly cashless-equipped machines to conform to the machine ID codes already in use by their existing vending management software system.
- You will need to enter the appropriate customer/location assignment in each machine's Asset record, replacing the original entry of <Unassigned (in warehouse>.
- For some machines, it may be necessary to *add or change* some of the other information. This will not always be necessary, because Greenlite can often detect certain information automatically.

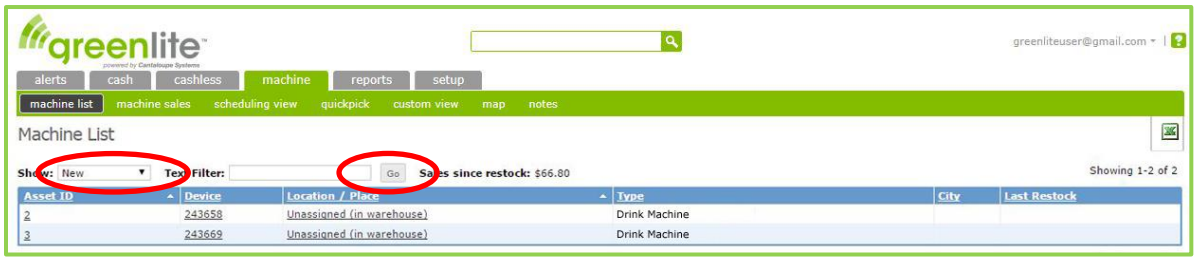
To begin this process, first be sure that you have the *Installation Recording Worksheet* filled out by the technician(s) who installed your Greenlite Cashless Equipment in the machines. This form is found in the service pack of machine or can be downloaded from www.greenlitevending.com/support/

- This worksheet will provide the ID number of the Greenlite Device installed in each machine, plus enough basic information about the machine to allow you to identify it – customer site, make & model, etc.

Next, at your computer, click the <**Machines**> tab on the top row of tabs, and then select <**Machine List**> from the dropdown menu:

This will bring up the Machine List, which defaults to show machines that are already deployed. When first setting up your system, of course, none of your machines are deployed, so none of the machines you need to set up will be visible at first.

Click the dropdown box at the field labeled “Show” and select <New>; then click the <Go> button (to the right of the “Text Filter” box). This will bring up a listing of the machines newly set up with Greenlite Devices:



Asset ID: For each *new* machine, the Asset IDs in the left-hand column are the auto-assigned asset codes that you will probably want to change.

- When the list is specified to show “New” machines only, you should see only the new machines whose records you will now edit.
- If you specify that the list show “All” machines, the list will also include any machines you have already set up, with their revised Asset IDs and correct customer assignments, etc., along with the new machines.

Device: This is the ID number of the Greenlite Device just installed in this machine. *(Not Editable)*

Location/Place: For each new machine, the default entry “Unassigned (in warehouse)” is shown as its location. This field will be updated when you edit the asset record and select the appropriate customer/location.

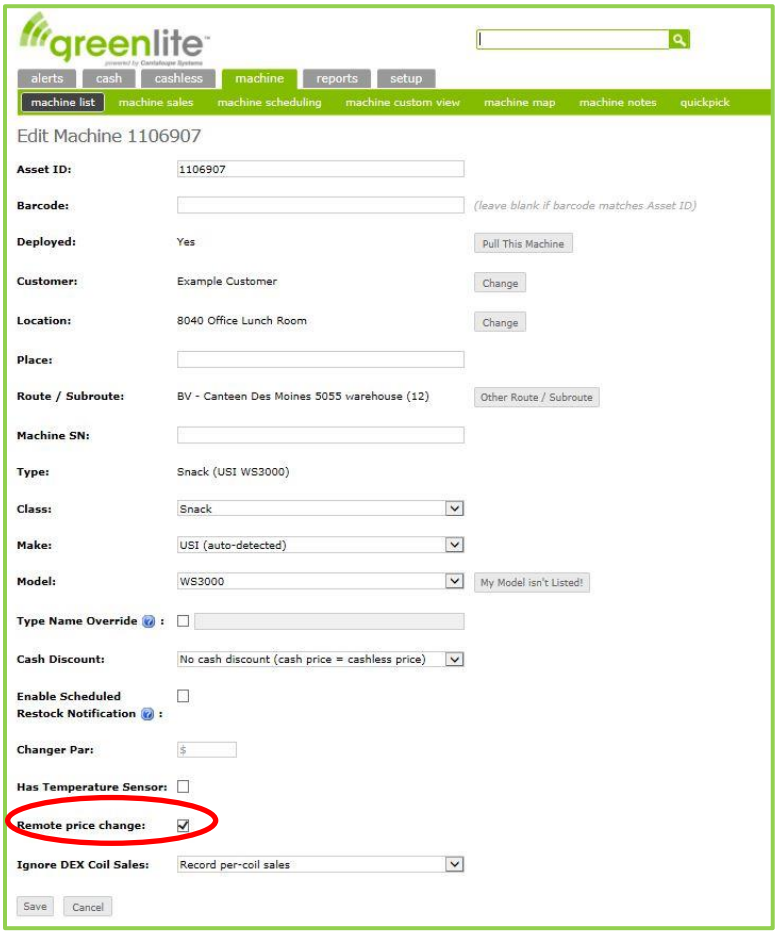
Type: For most, if not all machines, this information will *already be filled in* with up to three items of data auto-detected by the Greenlite Device:

- The ***Class*** or type of machine; e.g., beverage, snack, food, etc. *Not all machines provide this information automatically;* if desired, you can add an entry for Class during the editing process.
- The ***Manufacturer*** name (or “make”)**.**
- The ***Model*** number and/or name. (Most current-day vending machines provide make-and-model information in electronic form, if not the machine class.)

Now it’s time to *edit* each machine’s asset record. Identify a machine to edit by its Device ID, as shown on the **Installation Recording Worksheet**. Find that Device ID in the second column of the Machine List, and click the

Asset ID in the first (left-hand) column of that listing. This will bring up the Machine Detail screen for the selected machine. Click the <Edit machine info> button:

This will bring up the Edit Machine window:



Asset ID: The machine's auto-assigned Asset ID is displayed here. You will probably want to ***change this entry*** to the machine's ***current Machine ID number*** as entered into your existing recording system for your assets.

Barcode *(optional)*: If your machines are identified by barcode labels that drivers scan when performing and recording machine services, ***and if this machine's barcode is different*** from its machine code/Asset ID, enter the appropriate barcode in numeric form.

> ***Leave this field blank*** if you do not use barcode labels, *or* if this machine's barcode is identical to its existing machine ID code (i.e., identical to the new Asset ID just entered at the previous field).

Deployed: Should be set to <No> while the machine is temporarily assigned to the default customer "Unassigned (in warehouse)." At this point you should change this setting to <Yes> by clicking the <Deploy This Machine> button. ***NOTE:*** Remember that if you remove the machine from the location for some reason, to un-deploy the machine and reassign it to "Unassigned (in warehouse)."

Customer: Will normally appear as "Unassigned (in warehouse)" for any new machine entry. Click the <Change> button to enter the appropriate customer. A down-arrow will appear at the right-hand end of this field, revealing a dropdown box of valid entries. Select the appropriate customer.

Location: The customer name just entered will appear by default, indicating the customer's main location (which, for many customers, is their only location).

Effective Date: Here you select the date that machine will be placed on location and operating.

Place: If this is a customer with multiple locations, and this machine is placed at a location other than the main customer site, enter the location in this field *(example Alcove A or Teachers' Lounge).*

Route/Subroute: Should be displayed as <Default Route (1)>. You may need to select it if this is not shown by clicking the Other Route/Subroute button.

Machine SN *(optional)*: If desired, type in this machine's serial number.

Type: The entry displayed here is *not directly accessible* for editing. The value seen here is a combination of the entries at the next three fields. Whenever possible, each of the following values can be detected by Greenlite and will be displayed automatically. If necessary, you can add or edit information at any of these three fields, and the three-part entry for "Type" will be updated.

- ***Class:*** A machine's "class" is normally defined in terms of the kind of products it dispenses, for example: snack, beverage, glassfront (GF) beverage, etc.
  Make: The manufacturer name; if not auto-detected you can easily enter the correct manufacturer by selection from the dropdown list.
- ***Model:*** Like the manufacturer's name, the model number (or name) is normally auto-detected, and if not, you can usually make the correct entry by selecting from a dropdown list of the currently specified manufacturer's models. If the desired model name/number is not listed on the dropdown, click the button <My Model Isn't Listed> for additional choices (if any).

Type Name Override: If you were unable to create a complete Type description by updating the Class, Make, and Model fields, enter the *complete* desired type description here.
If any entry exists at this field, it will *replace* the type description created by the combination of the entries at the above three fields.

Cash Discount: If items in the machine are to be sold at a lower price when payment is in cash rather than cashless form, enter the difference, in cents, at this field. For each cashless sale, the item's price will be the price set up in the vending machine **plus** this amount.

- If you are going to offer a discounted price for using cash, you must make sure that your machines are labeled correctly for your customers. You are able to offer a *discount* for using Cash; however you are *not* able to say that you are imposing a *surcharge* or increased price for using Cashless.
- We suggest you label your machine with the following wording:

Posted Cash Price
Reflects a $0.10 Discount
from the Credit/Debit Card Price

- ***A $0.10 Cash Discount label with this wording is provided in the Greenlite kit (If factory installed this box will have been placed in the bottom of your machine.)***
- You may replace the $0.10 with the appropriate Cash discount amount. *(From $0.01 to $0.10)*

The next two machine-edit fields involve features not used in Greenlite:

Enable Scheduled Restock Notification: *(Not Used in Greenlite)*

PrePick Groups: *(Not Used in Greenlite)*

Has Temperature Sensor: Check this box for any refrigerated/frozen machine equipped with the optional connection from the temperature sensor to the Greenlite Device's <TEMP> port.

Remote Price Change: *(Greenlite Data Users Only)* Check this box if you wish to allow remote price changes for this specific machine. Prices changes can then be made from your machine planogram *(See Editing Greenlite Planograms)*

Ingore DEX Coil Sales: Two selections are available. *Record per-coil* and *Don't record per-coil sales (for food/coffee with incomplete planograms.)*

When done, click <Save> at the bottom left of the screen. The screen display will return to the "Machine Detail" screen for the machine.

Proceed to edit the Asset record of the next machine on your **Installation Recording Worksheet** list. As before, identify the machine to be set up by its Device ID. Bring up the Machine List, which will show the auto-assigned Asset ID corresponding to that Device ID. Repeat the editing procedures outlined above, starting at the Asset ID field.

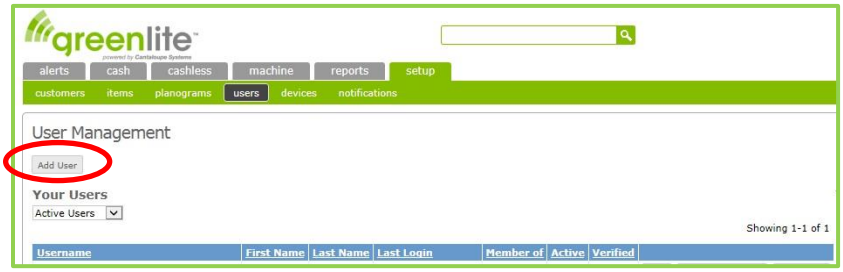
When done with all the machines, proceed to User Setup, as described in the next section. Then, if desired, set up your Notifications.

User Setup

*(Available for Greenilte **Data** users only.)*

Anyone you wish to allow access to this application can be set up as a *user.* Many of your users will, of course, be company personnel, but you can also, if desired, set up others (e.g., customers) as users with limited access.

Click back into the <Setup> tab, and select <Users> from the Setup menu, to bring up the "User Management" screen:



Start by clicking the <Add User> button to bring up the Create New User screen:

Email: Enter the individual's email address, which will serve as his/her User ID .

First Name: Enter the person's first name.

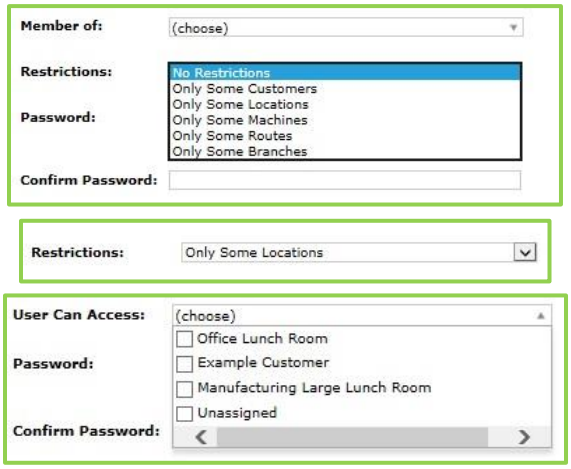
Last Name: Enter the person's last name.

Time Zone: Select the appropriate time zone for this person's usual location.

Member of: Default is (Greenlite). Choose Greenlite if not selected.

Restrictions: You can use this field to *limit access* for the user currently being set up, by making a selection from the dropdown box. You can specify the restriction in terms of Branches, Companies, Customers, Locations, Machines, or Routes by your election from the dropdown box at this field.

User Can Access: *This field appears on the screen* only *when an entry has been selected at the previous field, "Restrictions."* The selections listed in the dropdown list are determined by that selection.
That is, for example, if the Restrictions are defined as "only some locations," all locations will be listed, and you will be able to select one or more locations, etc. Check the box for each listed item to which this user will be allowed access; more than one may be selected.



Password: Leave this area blank if you are allowing the new user to set their own password. If you are entering a password on behalf of this user enter it hear. The password must be correctly entered in order to access the system. If you are allowing the new user to set their own password an email will be sent to the user with a link for them to set and confirm their own password.

Confirm Password: Leave this area blank if you are allowing the new user to set their own password. If you are entering a password on behalf of this user, re-enter the exact same password. The system will save the password only when two identical entries are made at these two fields.

Click <Save> to save the user just entered, or <Cancel> to cancel.

> ***Important:*** As each new user is created, an email is sent from donotreply@cantaloupesys.com to the email address entered as User ID***. Each new user will need to open and verify that email*** in order to complete his/her setup as a system user.

Notification Setup

*(Available for Greenlite **Data** users only.)*

Now that you have successfully set up your machines as *Assets* at customer locations and set up a selection of *Users,* your next and final step is to set up ***Notifications.***

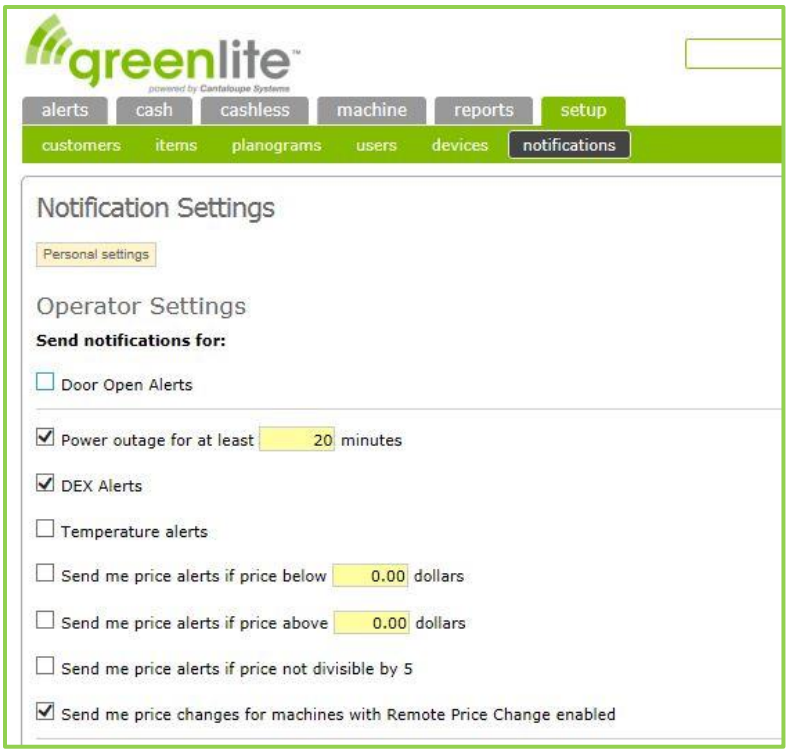
This feature allows you to define certain problems which will automatically cause the system to send messages to the email addresses and/or cell phone numbers that you specify.

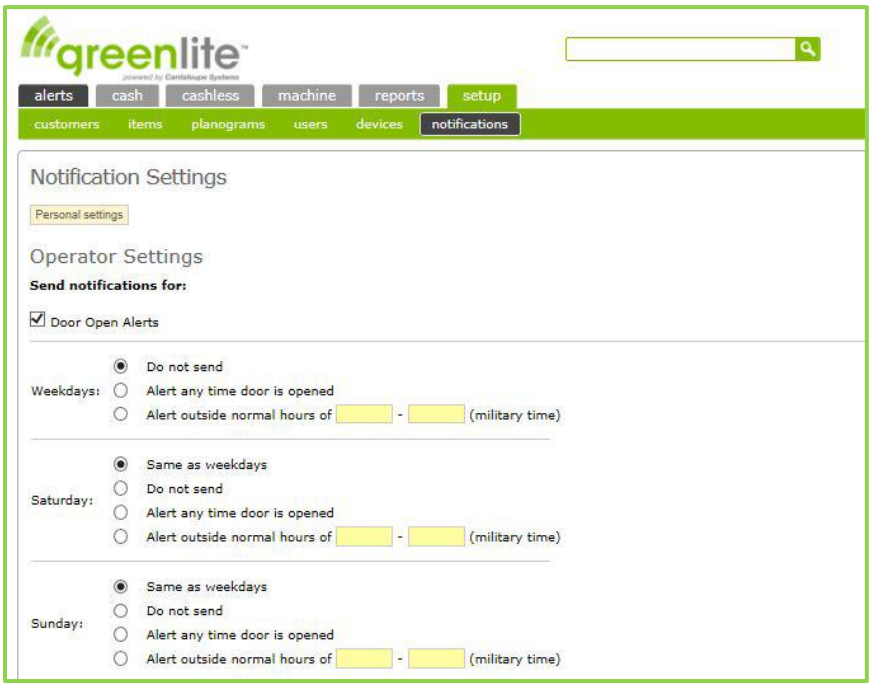
- First, set up system-wide ***Notification*** parameters by selecting and defining the conditions that will trigger messages to the email addresses and/or cellphone numbers that you will specify.
- Next, set up ***Personal Notifications*** for individual recipients. Any given individual can be set up to receive notifications for certain defined conditions at certain specified machines, customers, or locations. For example, you can set up different mechanics and/or drivers to each be notified of problems only on the routes for which each is responsible.
  - Persons *need not be defined as Users* in order to receive Notifications. Any valid email address or cellphone number can be set up to receive notifications

Also note: "Notifications" should not be confused with "Alerts":

- **Alerts** are automatically displayed by the system in response to issues detected at machines out in the field.
- **Notifications** are sent to specified recipients in response to conditions that you define on the Notifications Settings screen, such as door openings, DEX alerts, temperature problems with machines equipped with the optional temperature sensor, price changes, etc. You can use the Notification feature to inform anyone with an email address or cellphone number about specified problems.

  Under the <Setup> tab, select the <Notifications> tab:





Notification Settings

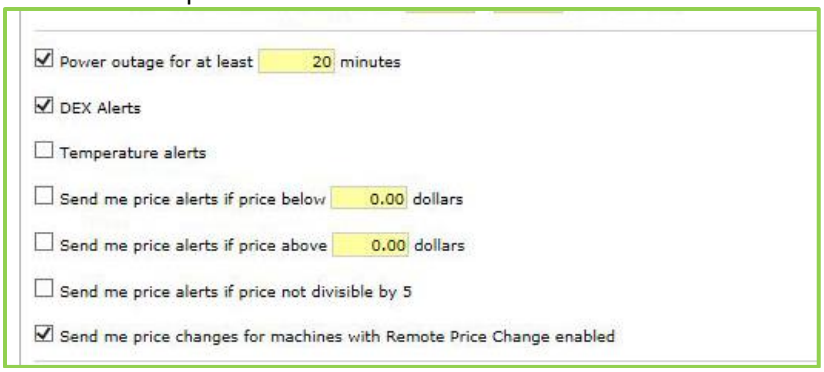
- **<Personal Settings>:** Click this button to set up Notifications for individual persons **only *after* having set up your Operator notification settings.**
  Before setting up your Personal Settings, first complete the Operator Settings on this screen.

Operator Settings

The settings entered here define situations which will prompt the system to create a notification to be sent to the individual email address(es) or cellphone number(s) entered in the Personal Settings section.

- **Door Open Alerts between ___ and ___:** Check this box for options to issue a message whenever a vending machine is opened outside normal business hours (i.e., when there is a possibility that theft has occurred). You must specify the hours during which an open door will trigger the notification *using military time.*
  - For example, to request a notification whenever any machine's door is opened after 9pm and before 4 am, enter "between 21:00 and 4:00."

  Note: Machines must be equipped with a door switch connection to the <DOOR> port on the Greenlite Device for the system to sense an open door.



- **Power Outage for at least ___ minutes:** Check this box *and* enter the desired number of minutes to issue a notification whenever a machine loses power for longer than the specified interval. **Note: For special order Greenlite GSM devices, using the AT&T or TMobile cellular network only.**
- **DEX Alerts:** Check this box to issue a notification when a machine's DEX data includes an error message. (The conditions reported via DEX alerts vary from one machine manufacturer to another.)
- **Temperature Alerts:** Check this box to issue a message whenever a machine's internal temperature falls outside a defined range.

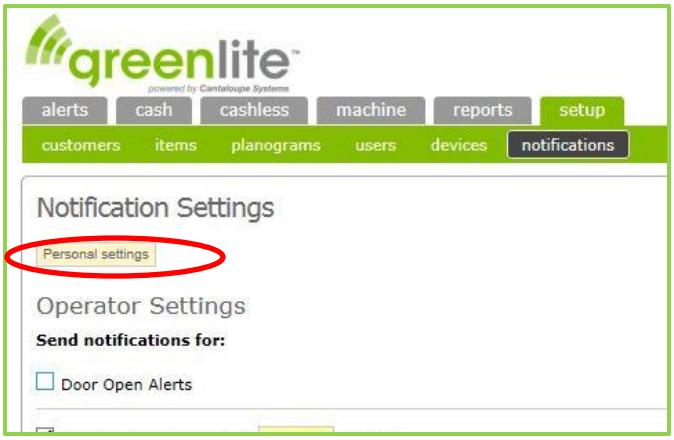
  Note: A machine must be equipped with the optional connection of the machine's temperature sensor to the <TEMP> port on the Greenlite Device for this alert to function. *(See the Temperature Alerts section later in this manual.)*
- **Price Alerts:** The final three fields allow you to request notifications whenever a machine's price settings change drastically enough to fall outside an acceptable range. (Note that the parameters you define will apply to *all items in all machines*.)
  - ***Send me price alerts if price below ___ cents:*** Check this box and enter the *lowest* price at which you sell any item. Enter this price in cents, without a decimal point; for example, $0.50 is entered as <50>.
  - ***Send me price alerts if price above ___ cents:*** Check this box, and enter the *highest* price at which you sell any item. Enter this price in cents, without a decimal point; for example, $2.50, is entered as <250>.
  - ***Send me price alerts if price not divisible by 5:*** Check this box to send a notification if any price does not end in a <5> or <0>. (To alert operator of penny pricing increments which may cause machine malfunction)
- **Remote Price Change Notification**: If you have Remote Price Changes enabled *(See Editing Greenlite Planograms > Remote Price Changes Section)* you can check this box and once your price changes have been completed during the next Greenlite device check-in you will receive a notification to confirm the change.

When done, click the <Save Settings> button at the lower left of the screen to complete setup of your Notifications parameters. Proceed to Personal Notification setup to specify the recipients of your notifications.

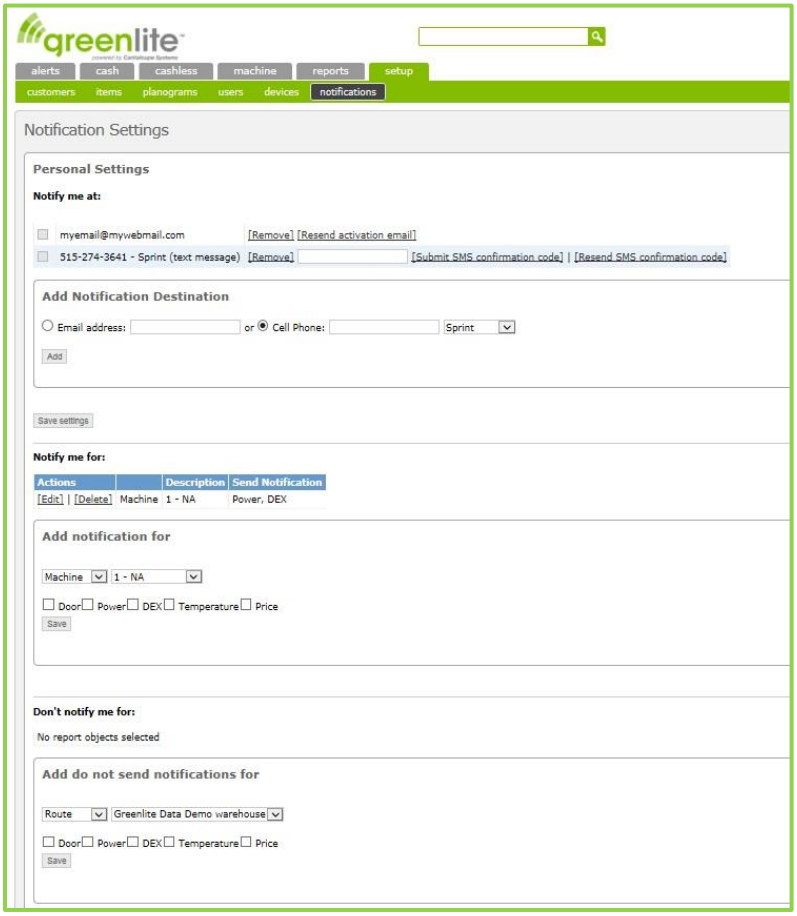
Personal Notifications

You can set up as many Personal Notifications as you wish, and define a limited set of machines and/or a limited set of problems about which each specified recipient will be notified.

When a problem triggers a notification, the system notifies all recipients set up here to receive notifications about that machine/customer where the problem occurred.



- ***<Personal Settings>*:** As noted above, click this button at the top of the "Notification Settings" screen to set up individual recipients. This will bring up a new window:



Notify me at: Any individual recipients who have *already been set up* for Personal Notifications will be listed here by email address or cellphone number.

Note that *names are not entered* for these Personal Settings, only destinations (email addresses or cellphone numbers). To add a new recipient, proceed to fill out the "Add Notification Destination" section:

- **Add Notification Destination:** Select one of the radio buttons to select the type of message, and then enter the address/destination, for notifications to be sent to a selected individual:
  - ***Email address:*** To send specified Notifications to an individual person via email, click here and type in the person's email address and click on the Add button. An email verification will automatically be generated and sent to the contact email. This email will appear in their inbox from *donotreply@cantaloupesys.com* with the subject title: *Please confirm your email address.* If it does not appear in their inbox it may have been moved to their spam folder. The user will need to click on the link contained in the email to verify their email. Once verified they will begin receiving notifications. If the email was lost you may re-send the verification email by clicking on [Resend activation email]. Once verified this option will disappear from the menu.
  - ***Cell phone:*** To send specified Notifications to an individual person via text message, click here and type in the person's area code number and phone number without any dashes separating the numbers (Example 5151234567). You must specify that cellphone's *carrier* by selection from a dropdown list. If the carrier is not listed please contact Greenlite support to assist. Then click on the Add button. A text verification will automatically be generated and sent to the contact phone number. This text will appear in their text inbox from *donotreply@cantaloupesys.com* with the subject title: *Seed Notifications confirmation code:* It will list the verification code the user will need to communicate back to you (the Greenlite admin.) so that you can enter it into the field next to their phone number. Enter the number then click the *[Submit SMS Verification Code]* link to complete the process. If the text was lost you may re-send the verification text by clicking on *[Resubmit SMS verification code].* Once the SMS code is typed into the field and submitted this option will disappear from the menu and the user text number is added to the notification and you can continue adding other numbers.

Notify me for: Each recipient can be set up to receive notifications in certain defined circumstances (e.g., an individual may be sent notifications only for a particular set of machines, or only for certain kinds of problems.) To define the circumstances under which notifications to be sent to this recipient, proceed to fill out the "Add notification for" section:

- **Add notification for:** Two dropdown boxes are provided for selection of the *set of machines* for which notifications will be sent to the currently specified recipient.
  At the first box, make one of four selections. The entry at the first box will determine the set of selections available for entry at the second box:
  - **Route:** This recipient will receive alerts issuing from any machine on a *single specified route.*
    The desired route is entered by selection at the second dropdown box.
  - **Machine:** This recipient will receive alerts issuing from a *single specified machine.*
    The desired machine is entered by selection at the second dropdown box.
  - **Location:** This recipient will receive alerts issuing from any machine at a *single specified location.*
    The desired location is entered by selection at the second dropdown box.
  - **Customer:** This recipient will receive alerts issuing from any machine at a *single customer's location(s).*
    The desired customer is entered by selection at the second dropdown box.
- **Door/Power/DEX/Temperature/Price:** Select any one or more of these options for the notification currently being set up (that is, for the currently specified recipient and for the set of machines defined above).
  - **Door:** Send notification if the door is opened during the hours specified under **Operator Settings**.
  - **Power:** Send notification if the machine loses power for the number of minutes specified under **Operator Settings**.

- **DEX:** Send notification if a machine's DEX data includes an alert.
- **Temperature:** Send notification whenever the machine's internal temperature falls outside the range specified under **Temperature Settings.**
- **Price:** Send notification if the machine's price settings fall outside the range specified under **Notification Settings.**

Do not notify me for *(Optional):* When desired, it is possible to *exclude notifications* from some of the machines in the currently specified set.

- For example, if <Route> is specified above, to send the current recipient notifications for all machines on a specified route, you can use this option to *exclude* notifications for a specified machine, location, or customer while still issuing notifications for the rest of the route.

When done, click the <Save> button at the lower left of the screen to complete setup of the currently defined Personal Notification.

The Personal Settings window will remain open, with all fields cleared for another entry, if desired. You can set up Personal Notifications for as many different recipients as you wish, and if desired, you can define more than one set of parameters for notification of any single recipient. Just click <Save> for each newly entered set of parameters before starting the next.

Conclusion

Setup of Machines (Assets), Customers and Locations and the Users, plus creation of your system of Notifications, completes the basic setup procedure for Greenlite. Now that your system is set up, we'll look at the features you will use to operate the system on a day-to-day basis.

Item Setup

If you are only using Greenlite for cash and cashless sales visibility you don't need to set up items in your system. However, to realize the full benefits of Planogramming, marketing and being able to utilize the pre-picking functions of the *Data* portion, it is in your best interests set up your items. This however requires discipline to keep up your database with the most recent information on your products. As your business grows you will realize the benefits of keeping an accurate database of products as this makes picking and reordering product from your suppliers easier and more accurate.

For Greenlite users, you have the ability to set up your items in your database by UPC, Item Name/Description, Category and Manufacturer. You can then edit each machine's planogram with the items you've set up in your database.

Greenlite Data users have expanded capabilities of quickly importing this information from an Excel formatted spreadsheet file.

Greenlite Data users also have the ability to copy and apply planogram templates across multiple machines as explained in the Planogramming section. To start setting up your items, click on the **Setup Tab** and select <items>.

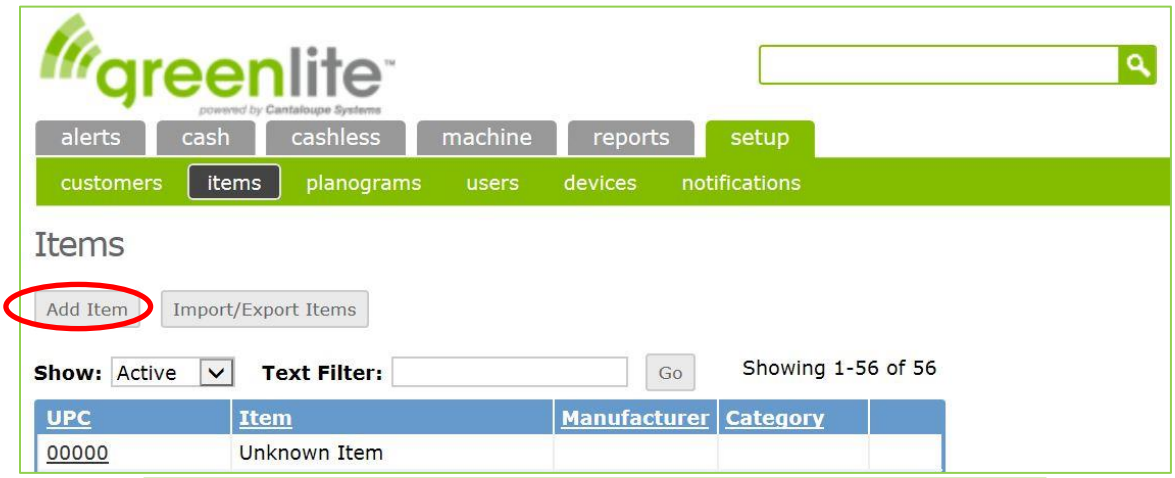
You see your item database screen. There are no items in your list as of yet. There are several buttons to take note of here:

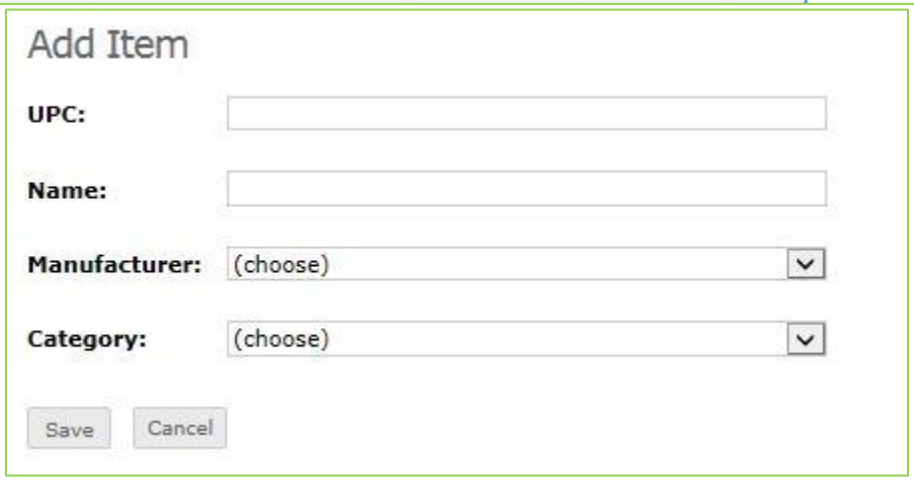
- ***Add Item:*** You will add new items to your database by first clicking here. This will take you to the Add Item screen where you will add information about the product.

- ***Inactive Items:*** After you've entered your items and saved them they are automatically made active in your database. If you need to make them inactive, say if product information has changed and you need to update the product at a later date you can deactivate the product by clicking the edit button and clicking the Deactivate button. The inactive items tab lets you view all your inactive items.
- ***Import/Export Items:*** (*Greenlite Data* users only) This tab allows you to import an existing item database from an Excel file from an outside source like a product manufacturer or product supply house. (See *Importing Items from External Data Bases* below for instructions.)

Note there is a **Quicksearch bar** to allow speedy searches of your items. This is especially helpful when you have a great number of items you can type in the UPC code or description and it will present you with all items that correspond with those characteristics to get right to the item you are searching for.

Let's start building the database. Click the <Add Item> button.



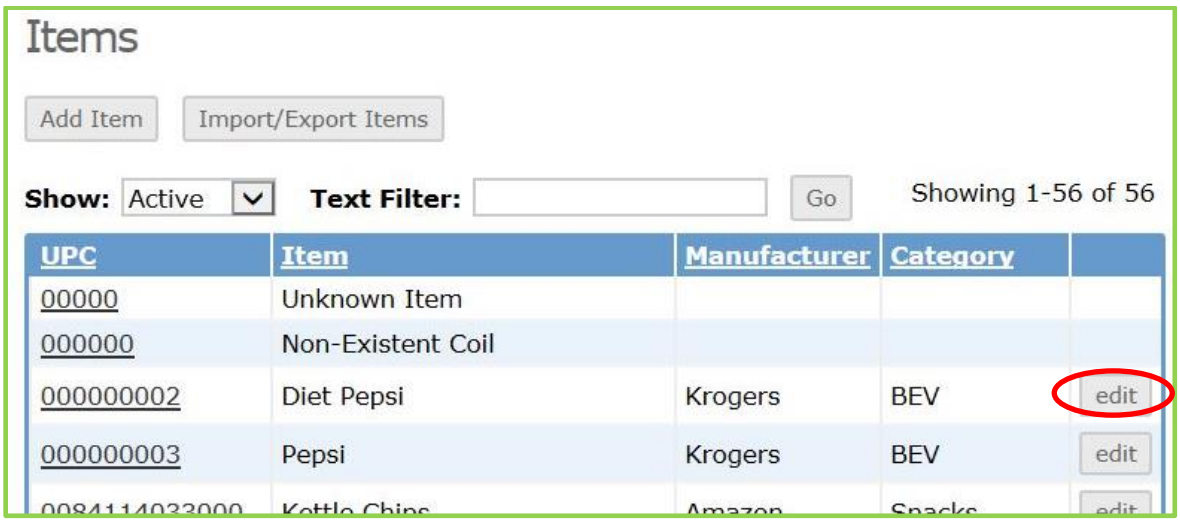


The Add Item screen has two areas that identify your items:

- ***UPC***: Universal Product Code found on the item packaging. Entering this code may help later in identifying like items that may come in different sizes (Example – Chips that come in 1 oz. size and larger 2 oz. but have the same name). It is just a good practice to get into as later as your business grows you will be dealing with UPC's on much greater scale. You can if you choose use your own numbering or naming system.
- ***Name***: Enter the item name here. Enter a name that has the most meaning and information to help differentiate it from like items later. For example you will have several styles and brands of chips. You may want to enter Potato Chips – Barbeque 1 oz. Whichever naming scheme you choose it should be uniform so that you can easily track and search for the items as your database of product grows.
- ***Manufacturer***: Here you can choose from a list of the manufacturers from the drop down menu.
- ***Category***: Here is where you can choose from a list of categories for the item from the drop down menu.

Add all the items you will be stocking and may be stocking in the future to your database.

To quickly edit the item or to deactivate the item, click the [Edit] link on the far right column.



You are now ready to populate your machine planogram with the items you just entered into your database. See **Editing Machine Planogram section.**

Importing Items from External Databases

If you have the Greenlite Data program, you have the feature of importing items from external databases. This is a time saver. This allows you to import items without having to manually type each item in as you do in the Greenlite Cashless program. Greenlite accepts imported files formatted in EXCEL format. The importable categories the import tool looks for are:

UPC: The universal product code number of the item. (Example – Individual or Loose Item UPC code, Case Code or Supplier assigned item number.)
Item Name: The name the product manufacturer has assigned to the product.

Category: The category that the item will appear under. (Example – Pastry, Soda, Juice, Energy Drink or Category name that best suites your own processes.)

Manufacturer: This is the producer of the product. (Example – Pepsico, Frito Lay See example 1.). Alternatively, you can also format this information to show the Supplier you get your product from (Example – SAM's Club – See example 2.) (Note that the import column name should remain titled *Manufacturer.*

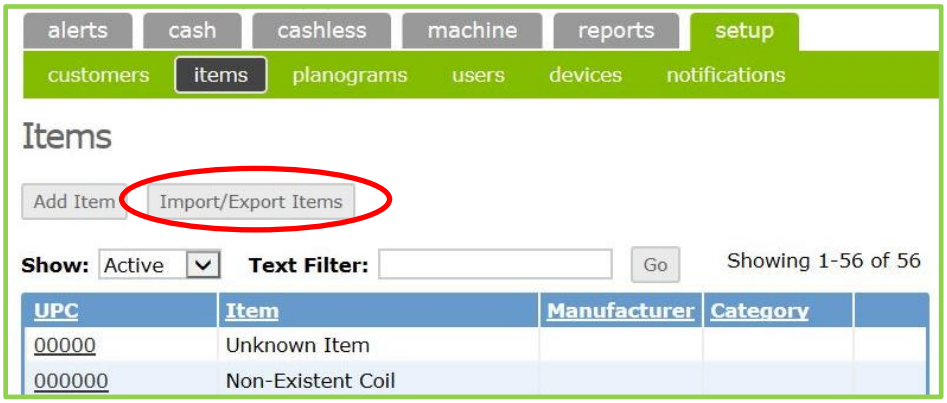
Example 1 – Showing individual item UPC and item manufacturer.

	A	B	C	D
1	**UPC**	**Name**	**Category**	**Manufacturer**
2	12000001307	Diet Pepsi	BEV	Pepsico
3	12000001291	Pepsi	BEV	Pepsico
4	84114033000	Kettle Chips	Snacks	Diamond Food
5	21908432656	Larabar PBJ Fruit Nut	Snacks	Small Planet Foods
6	88130442280	Trade Winds Sweet Tea	BEV	Nestle
7	12000061523	Lipton Iced Tea Lemon	BEV	Unilever
8	41800103072	Welch's Juice Grape	BEV	Welch Foods Inc.
9	28400028158	Ruffels	Chips	Frito Lay

Example 2 – Showing supplier assigned UPC and supplier name.

	A	B	C	D
1	**UPC**	**Name**	**Category**	**Manufacturer**
5	109572350	Trade Winds Sweet Tea	BEV	Sams
6	160379	Lipton Iced Tea	BEV	Krogers
7	171218	Welch's Juices	BEV	Sams
8	2017	Jack Links	JERKY	Sams
9	23968402	Dasani	BEV	Sams
10	306164	Garden Veggie Snack	Snacks	Sams
11	307250	Taste Good Chips	Snacks	Sams
12	342920	CheetosPuffs	Snacks	Costco
13	358119	AMP	BEV	Sams
14	37309	ICE Sparkling	BEV	Sams
15	385536	Gatorade	BEV	Sams

To **Import** items, click the **Setup Tab** and then the <items>.



You will then be able to find the Excel file you want to import by clicking on the Browse… Button. Locate the file on your drive and then click on the <Import> button. This will import the items to your database.

Exporting Item Database

Should you need to export a database to work on it outside of the Greenlite application you can select the fields you wish to export be checking and unchecking the boxes under the Export Items area of the **Set up Items** tab. Then click the **<Download Importable Data>** button at the bottom. This will export the list of items to an Excel file to a location of your choosing through your web browser typically with a Save as. prompt. You can edit the file with programs set up to view the Excel file type.

Basic System Organization

As noted in the introduction to this document, Greenlite consists of six main components, displayed as a row of six tabs on each system screen:

- Alerts

- Cash *(Visible only if you have the Greenlite Data Option)*
- Cashless
- Machine
- Reports
- Setup

We've explored the <Setup> tab first, because of course our first task was to get the system up and running. Now we'll take a look at each of the other five tabs, in order:

Alerts Tab

Greenlite provides several categories of ***Alerts*** notifying you of various types of problems that may occur at your Greenlite-equipped vending machines.

Unlike the Notifications in *Greenlite Data* that are sent to specified email or cellphone recipients, these alerts are simply displayed on the computer screen. You can display lists of these alerts at any time and should do so several times a day depending on your operation and machine stocking and service requirements. When a new problem is found, you can start to fix it working directly from the tabs displayed on the Alerts screen.

Your alerts will be displayed on-screen whenever you click the <Alerts> tab and select the desired type of alert. As long as you check your alerts regularly, you can respond to each problem as you see fit.

The options available under "Alerts" are listed top-to-bottom on the Alerts dropdown menu, and displayed left-to-right as a series of tabs when "Alerts:" is selected:

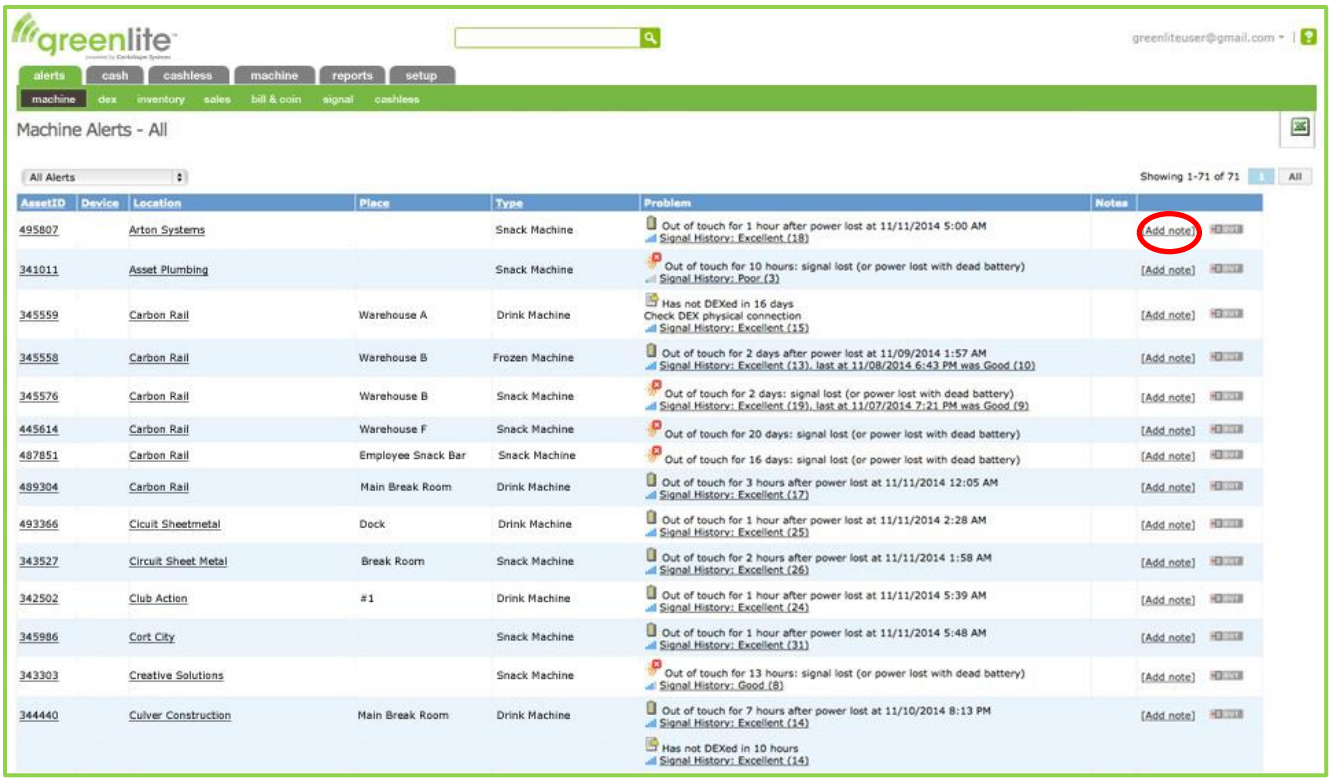
- Machine
- DEX
- Inventory
- Sales
- Bill & Coin
- Coil *(Shown only with Greenlite Data option.)*
- Signal
- Cashless

There are two levels of alerts.

> ***Cautionary*** (Identified with a Yellow Triangle) – These are alerts for items that may pose a problem but may be attended to at regular service intervals.
>
> ***Urgent*** (Identified by a red box with a white X) These alerts should be acted upon as soon as possible to avoid costly issues.

Machine Alerts

Select this option to display all *machine alerts* issued by the system. Most machine alerts are triggered by lack of communication or if there was an issue DEXing the machine.



The most recent alerts are listed first. (Note that the date and time when a problem was detected is *always included* in the description found in the column under "Problem.")

- ***Add Note:*** If you wish to *put off* any activity in response to this alert until some later date, or to *ignore* the alert indefinitely, click here to bring up a form for entry of a note. (To view all notes that have been entered, click the <Machine> tab and select the last option on the dropdown list, <Notes>.)

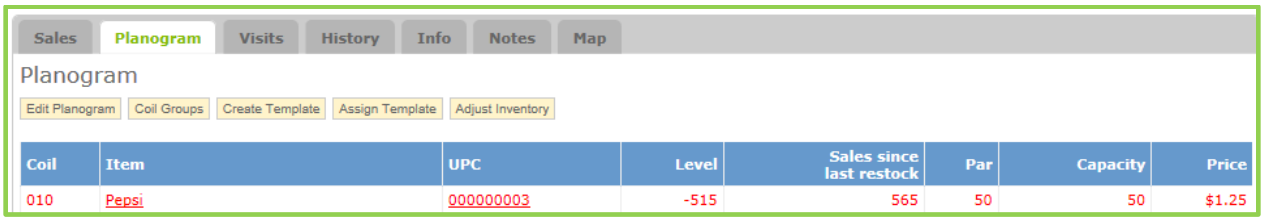
DEX Alerts

Note: *DEX Alerts come from the machines' DEX data stream, and the conditions defining an "alert" differ from one machine manufacturer to another.*

While *most* of the problems likely to cause a DEX alert involve sales data for individual product coils or columns, Greenlite users *will* want to respond to DEX alerts for ***low change*** and ***out of service***.

Inventory Alerts

Note: *Inventory Alerts* ***are not like the other alerts noted here***. Inventory alerts **do not appear in your Alerts tab**. If you are tracking your product inventory by item and have set up a Par Level (an amount that you fill to), you will be visually alerted to the product going below par when you view the **Machine Details** for the machine in question. The text for the product will turn **RED** indicating there is an inventory issue.



Sales Alerts

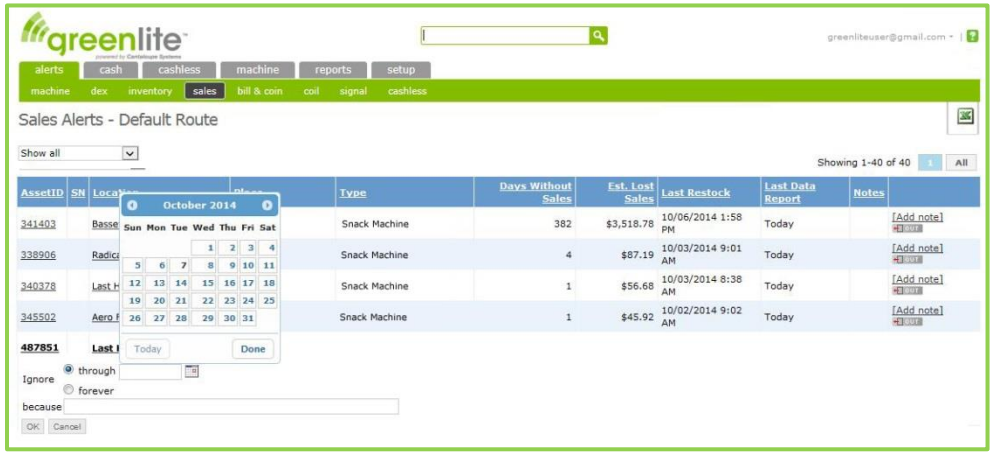
Sales Alerts are issued whenever a machine *fails to record any sales* for one full day or more. You can view all such alerts for all machines, or you can display only those on a specified route. Lack of any sales at all usually indicates that a machine is out of order.

Next, verify that the default selection <Show All> is entered at the dropdown box at the left, just above the list of Sales Alerts. (If another selection appears there, select <Show All> from the dropdown list.)

Note that the number of days without sales is listed for each machine on the list, along with estimated lost sales (based upon average daily sales at that machine before the alert was triggered).

In the last (rightmost) column for each machine, two options are offered:

- ***Add Note:*** If you wish to *put off* any activity in response to this alert until some later date, or to *ignore* the alert indefinitely, click here to bring up a form for entry of a note. (To view all notes that have been entered, click the <Machine> tab and select the last option on the dropdown list, <Notes>.)



- **"Ignore":** Select either of two radio buttons.
  If you select ***"through,"*** you must specify a date after which the alert will NOT be ignored.
  If you select ***"forever,"*** no prompt will ever appear for you to create a service ticket for this alert
- **"because":** space is provided for you to type in any pertinent comment.

When done, click <OK> to save or <Cancel> to cancel.

Bill & Coin Alerts

One of these alerts will appear for any machine where no bills have been accepted, or no coins have been accepted, for one full day or more.

Bill and Coin Alerts - All

Showing 1-13 of 13 | 1 | Show pages

Route	AssetID	SN	Location	Place	Type	Problem
Route 7	143144	203652	Prep Sto	OUTSIDE OFFICE	Snack Machine	No bills for 4 day(s) and 34 coin-only vends. Likely bill jam.
Route 3	343937	234326	TMC Trucking	DORMS	Snack Machine	No bills for 5 day(s) and 28 coin-only vends. Likely bill jam.
Route 2	489080	203460	Noval	Break Room	Drink Machine	No bills for 2 day(s) and 6 coin-only vends. Possible bill jam.
Route 3	343340	233610	Cotman Transmission	Waiting Area	Drink Machine	No bills for 19 hour(s) and 7 coin-only vends. Likely bill jam.
Route 2	344850	203658	Lomax Lumber	Yard 1 Gate	Drink Machine	No bills for 3 day(s) and 10 coin-only vends. Likely bill jam.
Route 8	495881	200993	Advantage Sideing	Break Room	Snack Machine	No bills for 3 day(s) and 7 coin-only vends. Likely bill jam.
Route 3	340769	201289	Benton Systems	2nd Floor	Cold Food Machine	No bills for 2 day(s) and 6 coin-only vends. Possible bill jam.
Route 7	494204	203421	Glidden Bricks	Break Room	Snack Machine	No bills for 25 hour(s) and 6 coin-only vends. Possible bill jam.
Route 3	495863	201200	Moro Claims	CAFETERIA	Snack Machine	No bills for 13 hour(s) and 8 coin-only vends. Possible bill jam.
Route 8	497931	203426	Sweet Spot	Dock	Drink Machine	No bills for 19 hour(s) and 4 coin-only vends. Possible bill jam.
Route 3	340788	201278	Muckleshoot	Casino Floor	Snack Machine	No bills for 9 hour(s) and 5 coin-only vends. Possible bill jam.
Route 1	345111	201375	Turnbull	1st Floor	Drink Machine	No coins for 3 day(s) and 22 bill-only vends. Likely coin jam.
Route 1	488484	201202	InstaSource	MAINTENANCE	Drink Machine	No coins for 4 day(s) and 17 bill-only vends. Possible coin jam.

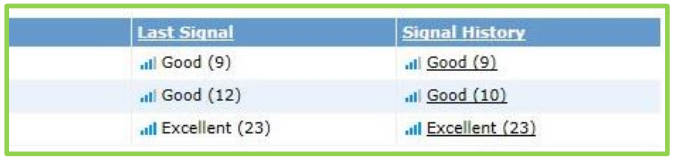
Coil Alerts

Individual coils with no sales for a specified period of time will be listed, showing the machine's Asset ID and the ID number of the coil. The column for Item (product) will read "Unknown Item" for each listed coil except where a machine has been set up with a planogram assigning products (items) to coils.

Signal Alerts

For every machine in the system, a signal rating consisting of a *word* and a *number* is shown for both "Last Signal" and "Signal History."

- Poor signal = <1> to <3>
- Fair signal = <4> to <7>
- Good signal = <8> to <12>
- Excellent signal = <13> and up



	Last Signal	Signal History
	Good (9)	Good (9)
	Good (12)	Good (10)
	Excellent (23)	Excellent (23)

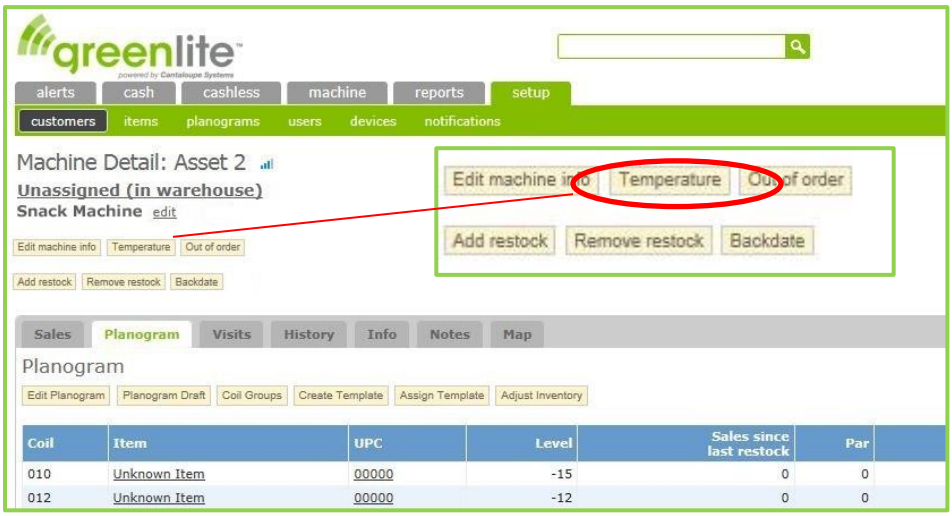
Cashless Alerts

Cashless alerts will inform you whenever a machine equipped for cashless goes without cashless sales for one full day or more.

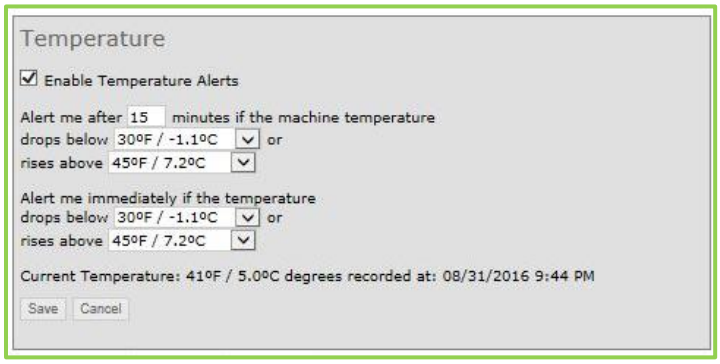
Temperature Alerts

If you have a refrigerated/ frozen machine and it is equipped with the optional connection from the temperature sensor to the Greenlite Device's <TEMP> port you will have the option to enable temperature alerts if the machine drops below or goes above a specified temperature range.

Machines equipped with this sensor and that are reporting will have an additional button visible next to the *Edit Machine Info* button labeled **Temperature** when in the customer setup view of the machine.



Clicking this button will bring up the options for Temperature Alerts. To enable temperature alerts, click the check box next to **Enable Temperature Alerts.** You will then be able to set the temperature minimum and maximum temperature levels as well as the delay in time to account for door open times for restocking machine, defrost cycles and other instances where the machine may normally reach a temperature outside normal operating ranges for brief periods. You will also be able to set immediate alert temperatures.



If you are a *(Greenlite user)*, the alerts will appear in your Alerts Tab. Check remember to check the Alerts area on Machine Alerts – All or specifically by selecting Temperature Alerts from the drop down at frequent periods to avoid costly down time of a refrigerated or frozen machine. In general for refrigerated machine an alert after 30 minutes if temperature is above 41°F can be set and for a frozen machine and alert can be set to appear after 75 minutes if temperature is above 0°F. (Note: On initial startup there could be an alert due to machine being warm.)

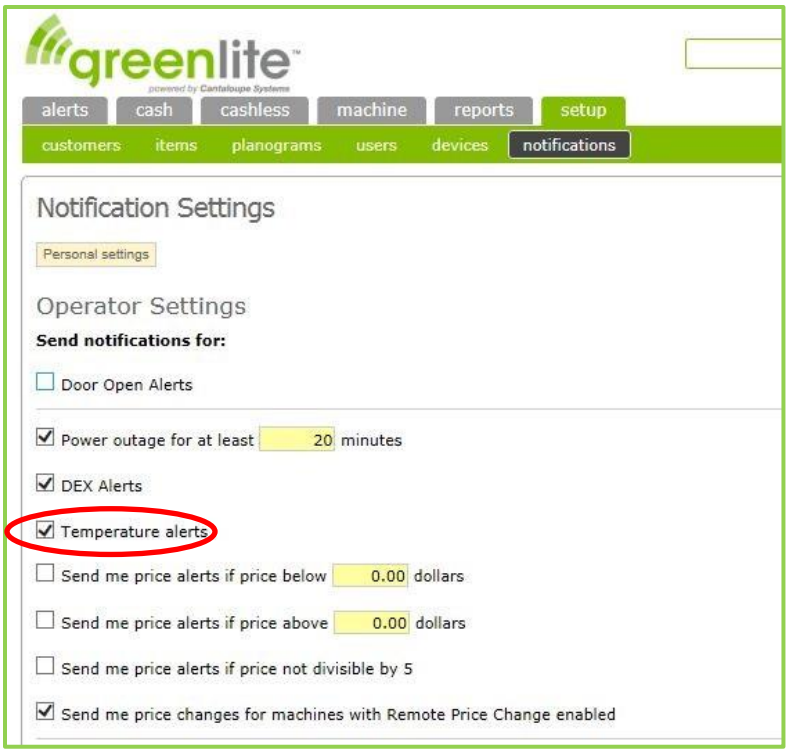
If you are a *(Greenlite Data user)* you have the option to have a notification sent to you via email or a text message in the event of a temperature alert.

To have notifications sent to you via email or text you must make the following settings to your Machine Information and User Notifications.

1. Set the temperature range information as explained above.

2. Check the box located next to the **Has Temperature Sensor** located on the *Setup>Customers>Edit Machine Info* page. Remember to click the save button to save changes.

3. Check the **Temperature alerts** box located in the *Setup>Notifications* page. Remember to click the save button to save changes.



This concludes our discussion of the "Alerts" tab.

Cash Tab *(Shown only with Greenlite Data option.)*

Note: Features listed below require the Restock Button on the Greenlite Device to be pressed for accurate data.

Greenlite provides a wealth of information about each machine's sales activities in addition to Cashless Sales data. Even when the *actual cash collected* at each machine is *not* entered into the Greenlite application, you still receive all of the cash-sales data tracked by DEX.

The features available under the "Cash" option are:

Cash Ticket List: Provides basic information about each machine restock conducted on a specified date and route, including the expected cash meter sales.

Cash Ticket Details: Provides complete detail about each machine restock conducted on a specified date, including cash sales, cashless sales, and total product sales, as well as sales by coil, coins to box, bills to stacker, coins to tubes, etc..

Cash History: Provides a list of all machine restocks on a specified date or for a specified period along with three <+/-> (over/short) values for each: Dex +/-, Meter +/- and Product +/-.

- This report will *not* be accurate unless actual cash collections and physical inventories are entered for each service.

Cash Input This is where the cash collected by route drivers and counted in the money room is entered into the system.

Cashless Tab

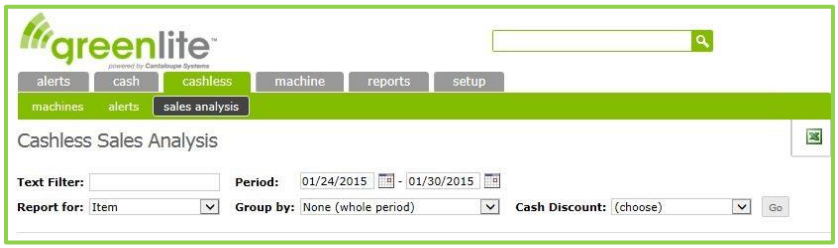
This section provides cashless information for your company. There are five menu options under this tab:

Machines: Click this selection to view a listing of your cashless machines, showing each machine's cashless sales for multiple time periods as well as the cashless discount and discount amount (if any) for each machine.

Asset ID	SN	Location	Place	Type	Cash Discount	Cashless Today	Cashless Yesterday	Cashless Week	Cashless Month	Cashless Year
142249	20072	Prep Stop	18th Floor Break Room	Drink Machine	$0.10	$0.00	$3.20	$25.30	$122.10	$694.90
142268	10334	Prep Stop	46th Floor	Drink Machine	$0.10	$3.20	$9.50	$61.40	$257.40	$1,567.80
144187	20153	Creative Visions	Break Room	Drink Machine	$0.10	$0.00	$3.70	$13.30	$19.60	$19.60
144224	20128	Newton Arms	10th Floor	Drink Machine	$0.10	$0.00	$0.00	$0.00	$0.00	$0.00
337881	203382	Eyemart	Break Room	Drink Machine	$0.10	$0.00	$0.00	$9.85	$49.90	$272.95
337900	36452	Prep Stop	Break Room	Drink Machine	$0.10	$0.00	$3.45	$19.30	$62.00	$498.00
338384	203532	Prospect	7th Floor	Snack Machine	$0.10	$0.00	$6.65	$26.70	$171.70	$515.90
338459	145522	Archways	Break Room	Snack Machine	$0.10	$0.00	$3.20	$8.00	$45.55	$216.50

Alerts: Click this selection to view your current Cashless Alerts. This is the same display accessed by Choosing the <Alerts> tab and then <Cashless>.

Sales Analysis: You can generate a report analyzing your cashless and cash sales by entering a few simple specifications at this screen:



IMPORTANT

This ***Cashless Sales Analysis Report*** is of critical importance to any company operating Greenlite as a supplement to their current vending management software system. ***Generate this report every day*** to determine the value of cashless sales at each machine since the last restock.

Note: ***Cashless Transaction Processing*** - Cashless transactions are processed daily. Cutoff time is 6 PM Pacific Standard Time on Wednesday for Friday disbursments to your bank account. When a product vend takes place a customer's card is charged for the product at the time the product is vended. In the event that a product vend fails to deliver a product the customer will see a credit to their account as soon as the processing bank completes the credit process, which should be no more than one business day.

This cashless-sales amount will need to be manually entered into your VMS for each service/restock of each machine equipped for Greenlite.

You will probably require a ***printout*** to assure accuracy in typing the cashless-sales amounts into your system. We recommend exporting your daily Cashless Sales Analysis to an Excel spreadsheet, which can easily be printed. You can ***sort the spreadsheet by Asset ID*** before printing to simplify transcription of the cashless-sales amounts into your VMS.

Text Filter: You can filter the report based on text. For example if you have one location you know by name you can type it here and the report will display a report with just this location name.

Period: Enter the date "from" and date "to" to define the period for which to generate the report.

- ***For normal daily use in conjunction with your current VMS, enter the same date at both fields to run the report for a single day.***

Report For: Make a selection to determine the level of detail to be included. The available selections are:

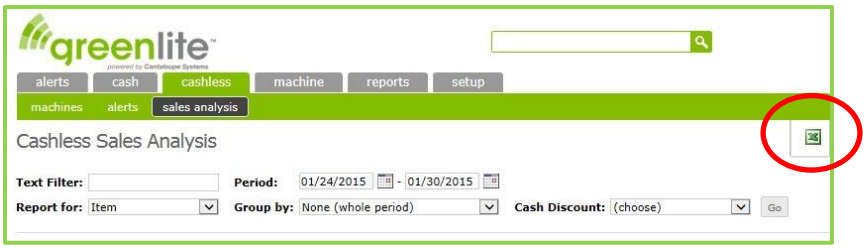
- ***Item:*** List cash, cashless, and total sales of a specified item (product). This option will be useful only where items have been set up in the system and planograms assigning items to coils have been set up for all Greenlite equipped machines.
- ***Machine:*** List cash, cashless, and total sales at individual machines.
  - ***For normal daily use in conjunction with your current VMS, select <Machine> as your "Report For" option.***
- ***Location:*** List the total cash, cashless, and total sales at each location, with no breakdown by machine.
- ***Customer:*** List the total cash, cashless, and total sales for each customer, with no breakdown by location or by machine.

Group By: Make a selection to provided subtotals for specified periods of time within the range of dates already specified. Available selections are:

- ***None (Whole Period):*** Provides for the whole calendar period.
- ***Day:*** Provide separate cash, cashless, and total less sales subtotals for each business day within the specified period.
- ***Week:*** Provide separate cash, cashless, and total sales subtotals for each week within the specified period.
- ***Month:*** Provide separate cash, cashless, and total sales subtotals for each calendar month within the specified period.
- ***Service Visit:*** Provide separate cash, cashless, and total sales subtotals for each time a driver serviced a machine within the specified period.
  - ***For normal daily use in conjunction with your current VMS, select "Service Visit" as your "Group By" option.***

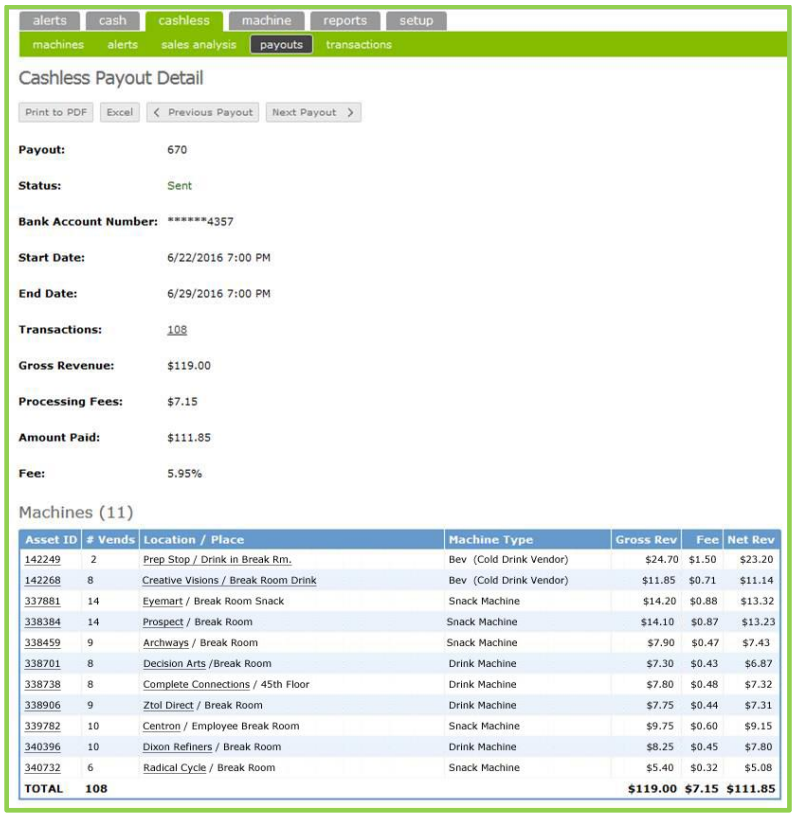
Cash Discount: Provides further filter options for displaying totals based on DEX (Cash) Price or Cashless price. Use this filter if you applying a cash discount on items.

Export to Excel: Click the green Excel icon at the upper right to export the current report to an Excel spreadsheet, which you can then print for the computer operator who will be keying cashless sales amounts into your existing vending management system.



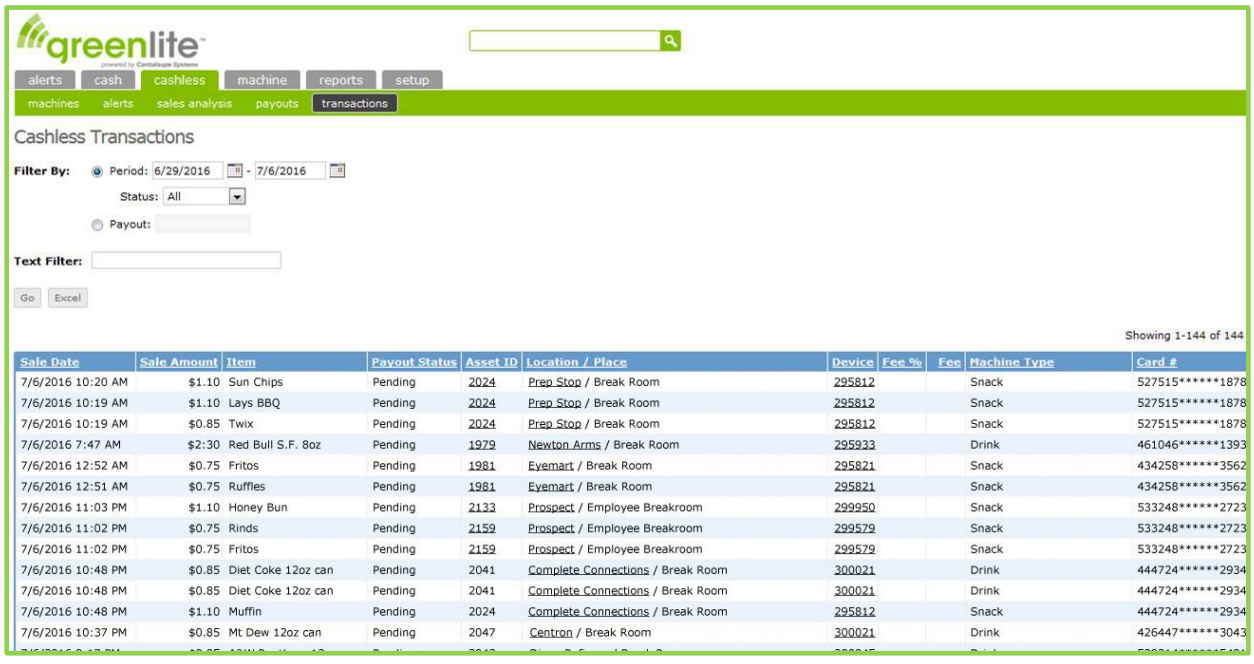
Payouts: You may review the payouts to your bank account by selecting the Cashless Payouts Tab. Here you can search by period and view the payout date, time, amount and status. You can export the payouts in Excel format or to a PDF format for use outside of Greenlite.

By clicking on the payout number detail in the first column you can view the individual payout details that show the status of the payment; bank account to which the payment is being routed; payment period start and end date; the number of transactions in the pay period; gross revenue; the total amount of processing fees for the transactions; total amount being paid to your account (minus the processing fees); and the transaction fee rate amount. You can also view the individual machines contributing to the payment.



Asset ID	# Vends	Location / Place	Machine Type	Gross Rev	Fee	Net Rev
142249	2	Prep Stop / Drink in Break Rm.	Bev (Cold Drink Vendor)	$24.70	$1.50	$23.20
142268	8	Creative Visions / Break Room Drink	Bev (Cold Drink Vendor)	$11.85	$0.71	$11.14
337881	14	Eyemart / Break Room Snack	Snack Machine	$14.20	$0.88	$13.32
338384	14	Prospect / Break Room	Snack Machine	$14.10	$0.87	$13.23
338459	9	Archways / Break Room	Snack Machine	$7.90	$0.47	$7.43
338701	8	Decision Arts /Break Room	Drink Machine	$7.30	$0.43	$6.87
338738	8	Complete Connections / 45th Floor	Drink Machine	$7.80	$0.48	$7.32
338906	9	Ztol Direct / Break Room	Drink Machine	$7.75	$0.44	$7.31
339782	10	Centron / Employee Break Room	Snack Machine	$9.75	$0.60	$9.15
340396	10	Dixon Refiners / Break Room	Drink Machine	$8.25	$0.45	$7.80
340732	6	Radical Cycle / Break Room	Snack Machine	$5.40	$0.32	$5.08
TOTAL	**108**			**$119.00**	**$7.15**	**$111.85**

Transactions: You can view your transaction history by selecting the **Cashless Tab> Transactions.** This searchable view displays your cashless transactions by period. You'll see Sales Dates; Sale Amount; Item Sold; Payout Status; Asset ID; Location Information; Device Number; Transaction Fee Percentage Rate; Total Fee Amount; Machine Type; and the truncated card ID number used in the transaction. This report can be exported to Excel format by clicking the Excel button.



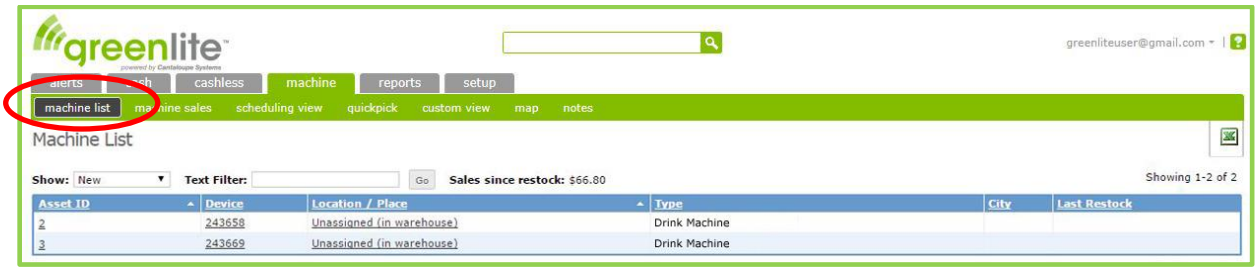
Sale Date	Sale Amount	Item	Payout Status	Asset ID	Location / Place	Device	Fee %	Fee	Machine Type	Card #
7/6/2016 10:20 AM	$1.10	Sun Chips	Pending	2024	Prep Stop / Break Room	295812			Snack	527515******1878
7/6/2016 10:19 AM	$1.10	Lays BBQ	Pending	2024	Prep Stop / Break Room	295812			Snack	527515******1878
7/6/2016 10:19 AM	$0.85	Twix	Pending	2024	Prep Stop / Break Room	295812			Snack	527515******1878
7/6/2016 7:47 AM	$2:30	Red Bull S.F. 8oz	Pending	1979	Newton Arms / Break Room	295933			Drink	461046******1393
7/6/2016 12:52 AM	$0.75	Fritos	Pending	1981	Eyemart / Break Room	295821			Snack	434258******3562
7/6/2016 12:51 AM	$0.75	Ruffles	Pending	1981	Eyemart / Break Room	295821			Snack	434258******3562
7/6/2016 11:03 PM	$1.10	Honey Bun	Pending	2133	Prospect / Employee Breakroom	299950			Snack	533248******2723
7/6/2016 11:02 PM	$0.75	Rinds	Pending	2159	Prospect / Employee Breakroom	299579			Snack	533248******2723
7/6/2016 11:02 PM	$0.75	Fritos	Pending	2159	Prospect / Employee Breakroom	299579			Snack	533248******2723
7/6/2016 10:48 PM	$0.85	Diet Coke 12oz can	Pending	2041	Complete Connections / Break Room	300021			Drink	444724******2934
7/6/2016 10:48 PM	$0.85	Diet Coke 12oz can	Pending	2041	Complete Connections / Break Room	300021			Drink	444724******2934
7/6/2016 10:48 PM	$1.10	Muffin	Pending	2024	Complete Connections / Break Room	295812			Snack	444724******2934
7/6/2016 10:37 PM	$0.85	Mt Dew 12oz can	Pending	2047	Centron / Break Room	300021			Drink	426447******3043

Machine Tab

The options available via this tab all relate to individual vending machines, yielding information on machine sales, restocking, route assignments, route scheduling, etc.

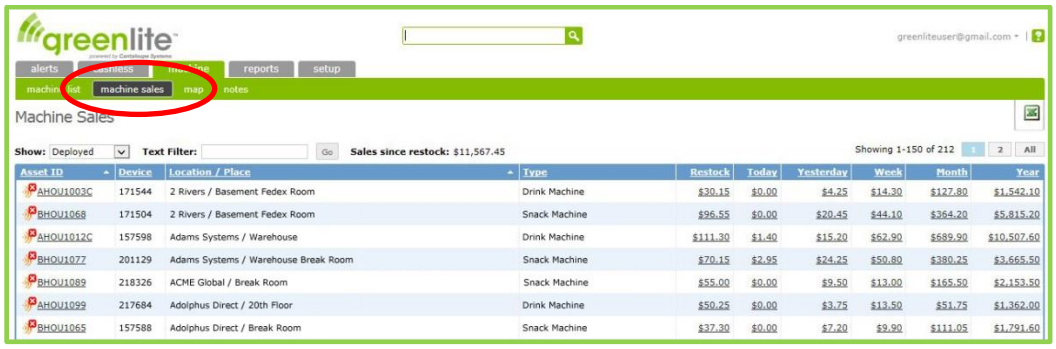
Machine List

We have already seen the Machine List available via this tab when we were setting up our Greenlite machines at their locations. As you may recall, basic data about each machine (i.e., the information in each asset record) can be viewed and edited by selecting a machine from this list.



Machine Sales

For each machine in the system, a product sales value is shown for the most recent restock, for today, yesterday, this week (WTD), this month (MTD) and this year (YTD.)

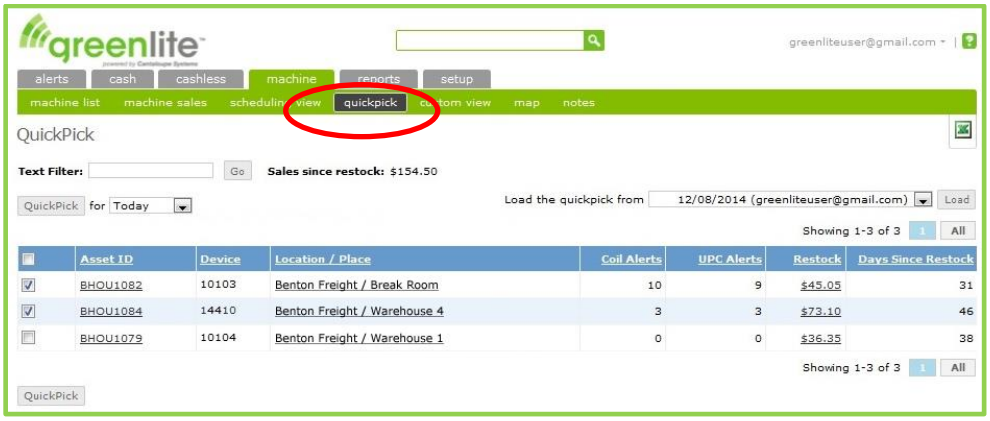


Machine Scheduling View

*(Greenlite **Data** Users Only)* This listing provides data for each machine including any Coil Alerts or UPC Alerts from each machine, the amount collected at the last restock, and the number of days since the last restock. This is useful information when deciding how to schedule machines visits.

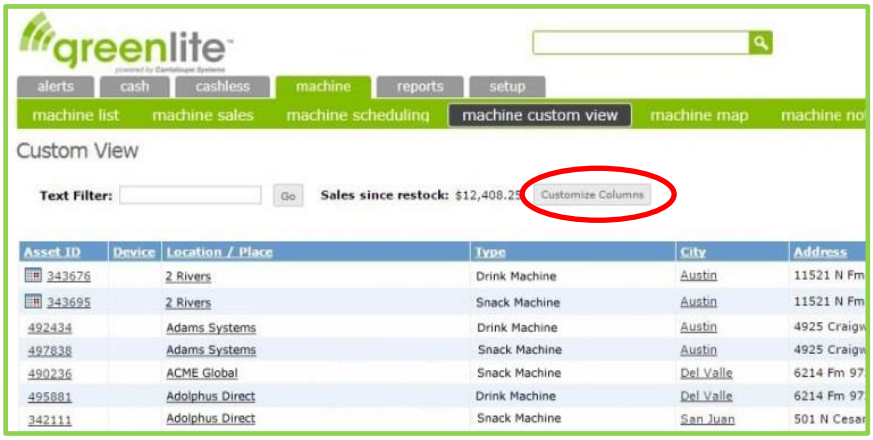
Quickpick

*(Greenlite **Data** Users Only)* Where product sales are tracked by the individual item, where planograms are in place, and where fills, removals, and machine physical inventories are entered into Greenlite, the Quickpick feature will provide Pre-Kit quantities for each product. See **Daily Operation** Section for detail on Quickpick usage for every day functionality.

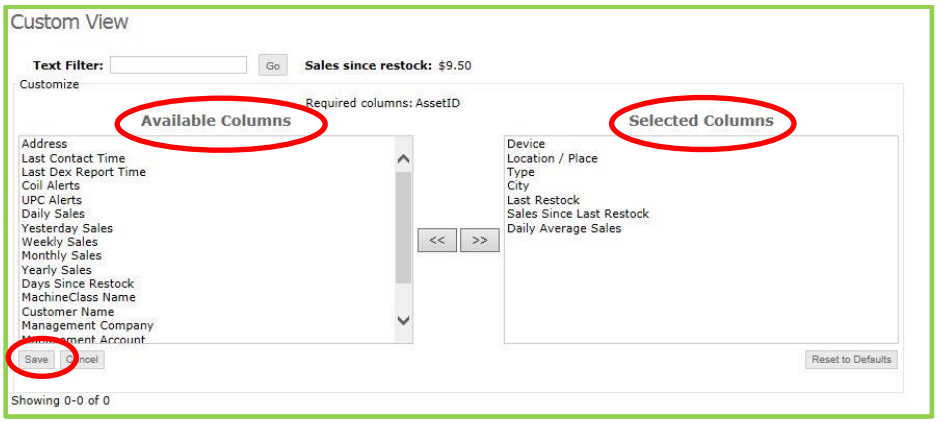


Machine Custom View

*(Greenlite **Data** Users Only)* This listing of machines can be customized by selecting the column headings you wish to include. Note the <Customize Columns> button:



Click the button to bring up a screen that will allow you to select the column headings that will provide the information you desire. “Available Columns” are listed on the left, and the currently “Selected Columns” are on the right.



You will note that *only one column heading* is required: the Asset ID, which will always appear as the first column from the left.

You can move column headings from the left column to the right in order to *include* them in your custom-designed listing (Custom View). You can also move any of the currently selected headings from right to left to *eliminate* them from your Custom View.

Highlight the column heading you wish to move and click the [>>] or [<<] button, as appropriate, to remove it from that box and move it into the other.

To select *multiple items* from either list and move them all at once, you can use the <Shift> and/or <Ctrl> keys. Hold down <Shift> or <Ctrl> while clicking two or more listings to highlight each selection; hold down <Ctrl> and click two selections on the list to highlight the two selections *plus* every item on the list between the two selections.

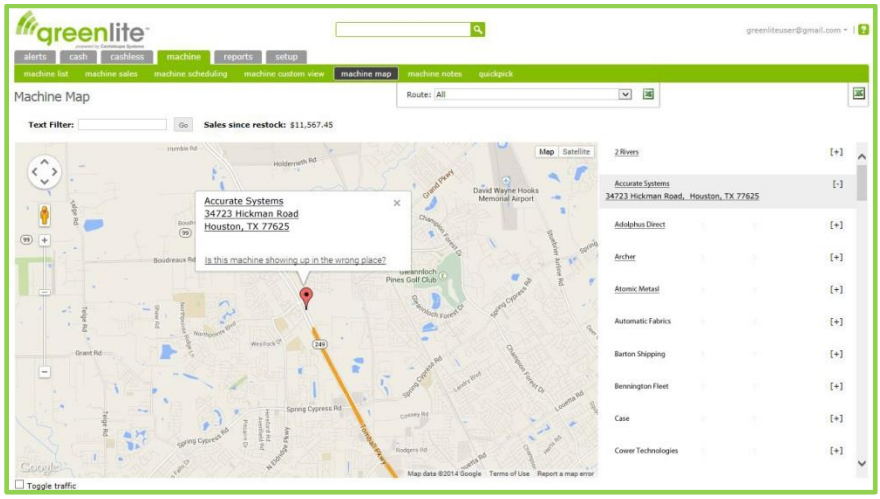
When done with your column selections, click <Save> at the lower left. The screen display will return to the listing format, providing information under the set of columns that you specified.

Map

This feature shows the exact location of each machine on a map of your area.

Select the <Map> tab, and the screen will display a blank map of your area, along with a list of your customers at the right:

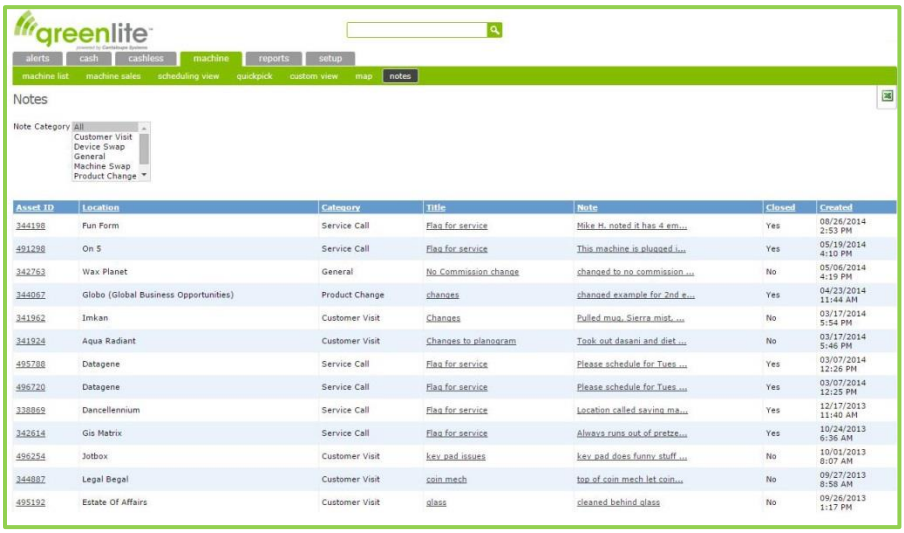
Click on any customer name on the list at the right, and “pushpin” symbols will appear on the map showing *every* machine’s location. The customer that you selected will be tagged with a callout:



Machine Notes

This feature allows a user to view any *notes* that may have been entered regarding problems or other incidents involving the currently selected vending machine. Such notes can be entered in various places throughout the system.

The complete history of notes that have been entered is displayed on screen, most recent first. Each listing shows the machine’s *Asset ID*; the *category, title*, and *text* of the note; whether the note has been *closed* (i.e., whether follow-up has occurred), and a *timestamp* showing the date and time that the note was entered.



To narrow down the selection of notes being displayed, you can select one of several *categories* of notes in order to show a listing of notes of that category only. Available selections are:

Customer Visit: Whenever company personnel need to see a customer in person for any reason besides routine machine restocks or deliveries, a note should be recorded. Separate categories are provided for several service-tech issues; use this category for all other customer-service and sales-related visits.

Device Swap: Whenever a machine's Seed Device is removed and/or replaced, make a note. It is *critical* that the Asset record of any machine involved in the swap be accurately updated. If it turns out that any Asset record is incorrect, referring to this category of notes should help solve the problem.

General: Catchall category.

Machine Swap: Enter a note to record the details of any machine movement.

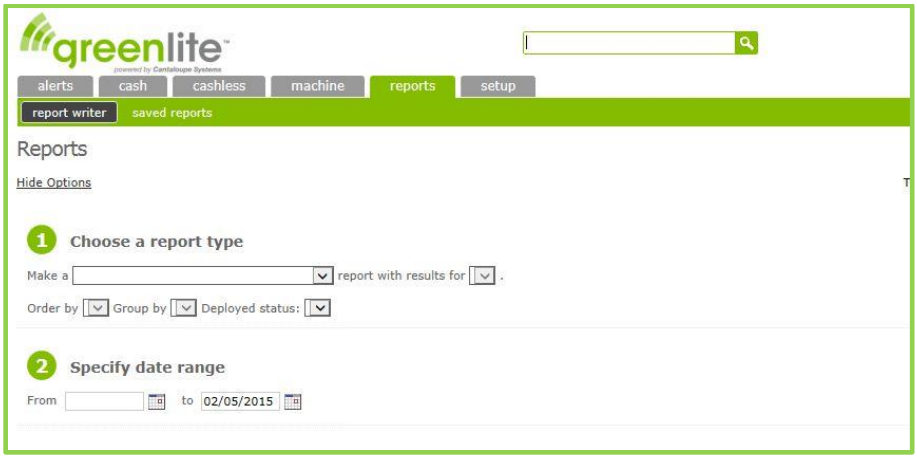
Product Change: Users who are tracking item inventory and using planograms will need to make a record whenever the product assigned to a particular coil in a machine is changed.

Service Call: Make a note to record each maintenance or repair call made by your service technicians.

You should consider setting a company policy outlining when and how to record these Notes.

Reports Tab *(Greenlite Data Users Only)*

Report Writer



The Report Writer allows you enter specifications for a variety of useful report formats. Working from a single specification screen, you can specify:

- The desired ***type*** of reports;
- A range of dates to define the ***period*** of time to be reported; and
- One or more optional ***filters,*** if desired, to narrow the focus of your report.

1. Choose a Report Type:

To begin, select a ***Report Type;*** the dropdown box lists these alternatives:

- **Sales:** A Sales Report can be generated for customers, locations, routes, or assets (machines), showing ***unit sales*** and ***dollar sales*** during the specified period for each specified entity. The report can be configured to list entities in unit-sales order or dollar-sales order.
  - If you are tracking *items* -- the products sold through your machines -- this report can also be specified to show sales by item, by product manufacturer, or by item category.
- **Performance:** A Performance Report can be generated for customers, locations, or assets (machines), showing ***dollar sales*** and ***(total) unit sales,*** as well as ***unit sales per day*** and ***per week***.
- **Access:** The Access Report is run by asset (machine); it lists ***every time a machine was opened*** during the specified period, along with a notation whether or not the machine was restocked that day.
  - A <No> in the "Restocked That Day" column is, of course, cause for concern.

- **Cash Accountability (Simple):** The Accountability Reports are specified by Asset (machine), and provide a separate listing for each visit to the machine for restocking.
  For each restock, the "simple" accountability report shows ten columns of data, including the actual cash collected, along with the "DEX Cash," "Meter Sales," and "Product Sales" values that predict the amount of cash expected. Entries for <DEX +/->, <Meter +/->, and <Product +/-> values ("over/shorts") are also provided.
- **Cash Accountability (Detailed):** The detailed version of the Accountability Report includes thirty (30) columns of information, each of which might affect the <+/-> balance for each restocking visit. These additional categories of data include bills to the box, coins to the box, etc., and -- of particular interest to Greenlite users -- ***Card Sales, Greenlite Cashless Sales***, and ***Card +/-.***
- **Bill Changer and Kiosk Accountability:** This report shows activity at standalone bill changers and micro-market kiosks where transactions involve simple change-making without product sales.
- **Cash Collections:** This report shows the expected collections, the actual cash collected, the cash over/short, and the service time at each restock.
  - *If cash-collection data is not entered into Greenlite Data*, the over/short values on this report will not be correct.
- **Price Exception:** This report pinpoints the coils in machines where the ***DEX Price*** programmed into the machine differs from the ***Desired Price*** for the item being sold through that coil. (The Desired Price is the selling price entered for that product in the machine planogram.)
  - This report will yield valid information only where planograms with pricing have been set up.
- **Efficiency:** This report provides a single line (row) of data showing 22 different company-wide totals for the specified time period.
  - *Because some of this data may not be entered into Greenlite,* this report may not yield completely accurate results.
- **Service Statistics:** This report provides information on machine services (visits to restock machines) over a specified period of time.
  - *If cash-collection data is not entered into Greenlite*, the over/short values on this report will not be correct.

2. Specify Date Range

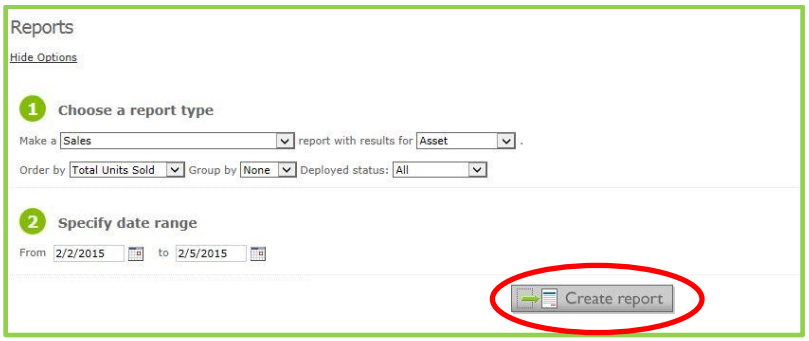
Once you've selected a Report Type, specify a ***from date*** and ***to date*** to define the ***Period*** for which to generate the report. Note that the second field, for "ending" date, is filled in by default with today's date; this can be easily changed when desired.

3. Select Filters (optional)

Finally, you have the option to select one or more ***Filters*** to further narrow down the items to be included. Greenlite users are most likely to use the ***Customer, Location, Asset*** and ***Item*** filters; *Routes* are not usually set up by cashless-only users.

Create Report

To generate the specified report, click the large <Create Report> button at the bottom on the screen. (This button appears after specifications have been entered at the first two fields: the *report type* and the *"with results for"* selection).



Once a report has been displayed onscreen, a pair of icons appears at the upper right corner of the screen, providing options either to export the report to an Excel spreadsheet or to save it to disk:

Click the Excel icon (with green "X") to export the report to an ***Excel spreadsheet*** that can then be printed and/or saved, or even be used for further calculations.

Click the "Save" icon (resembling a floppy disk) ***to save the report*** directly to disk.

- If you use the "Save" option, you will be able to recall the report in the future using the "Saved Reports" option.

Saved Reports

Any report that you have saved can be accessed at a later date by selecting "Reports" from the main-menu row of green tabs, and then selecting <Saved Reports>.

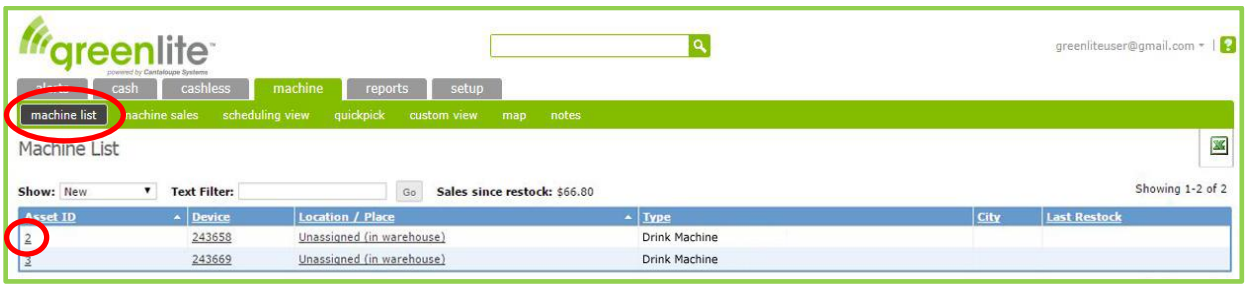
- A Saved Report can be used as a ***template*** for future reports. For example, if you ran a particular report type last month, showing monthly totals for a certain customer (or location or route, etc.) and then saved it, you could generate the same report for this month and any subsequent month simply by calling up the saved report, changing the dates, and clicking <Create Report>. The result will be the same report format, with new data for specified period.

You have now completed basic setup of your Greenlite installation.

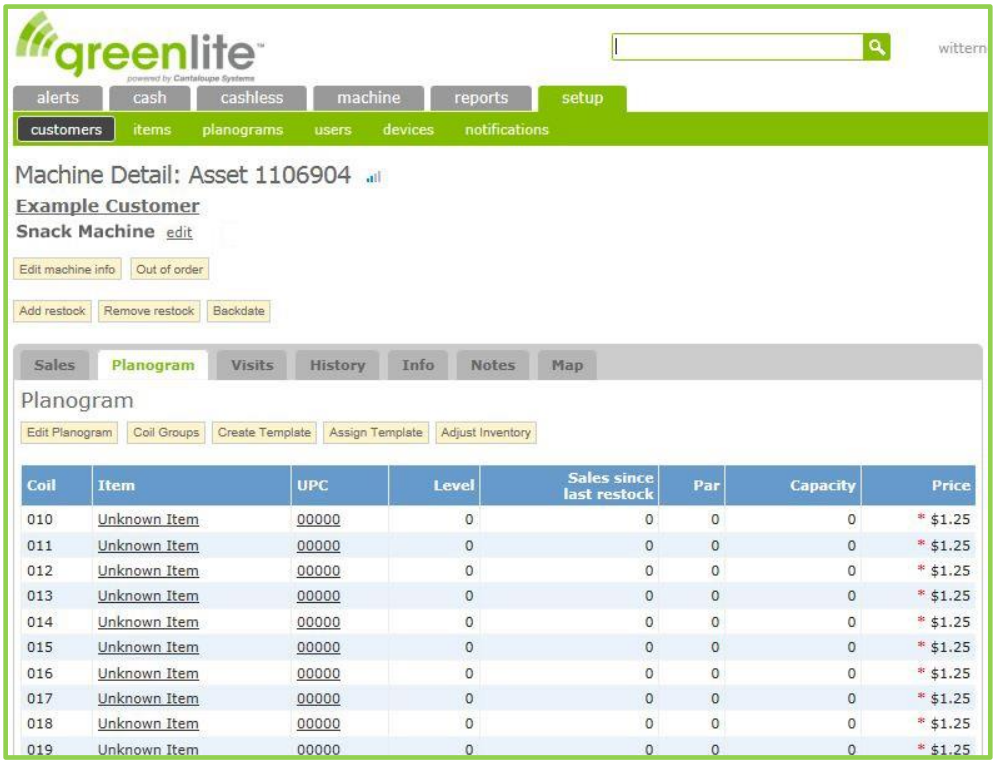
Editing Machine Planogram

Planogramming is a great way to monitor what your customers are buying at each location. Planograms are not necessary for the function of Greenlite but it is advised to set up the machine planogram for each machine. Planograms help you determine what products to bring to each of your machines; adjust your product offerings to determine the best product mix; and vend prices for each of your machines to maximize your profitability and reduce waste from unwanted items.

In order to edit the Planogram for a machine, select the **Machine Tab** and select the <**Machine list**>. Then click on the underlined <**Asset ID**> link for the machine you wish to planogram.



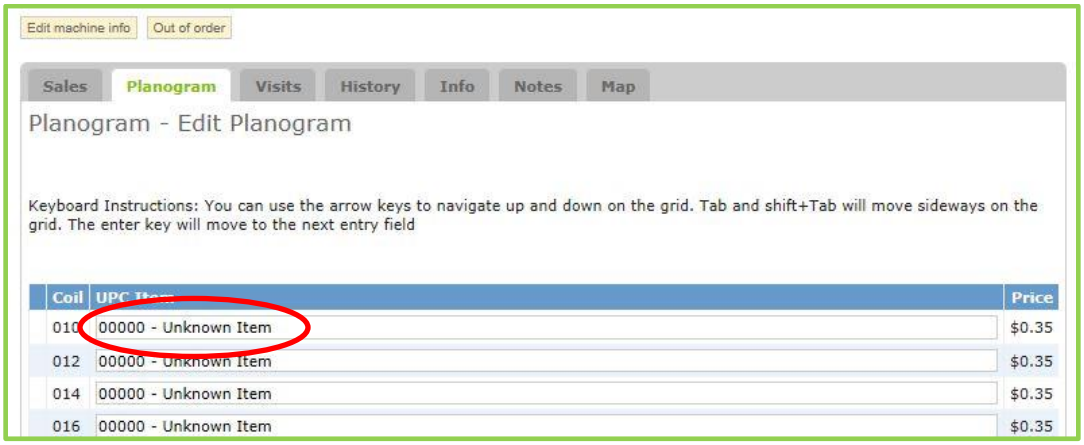
You will then see the planogram for the machine. This planogram is initially automatically populated from the DEX information reported from the machine. You can then edit the planogram by clicking the <**Edit Planogram**> button. The planogram details for the Greenlite and Greenlite Data services are different and are detailed in the sections below.



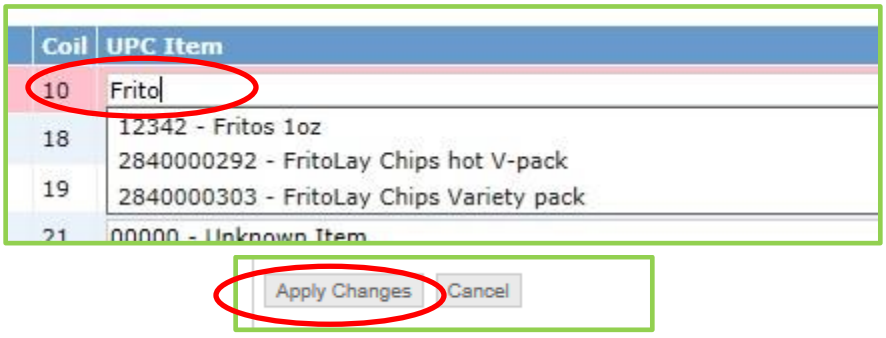
Editing Greenlite Planograms

By clicking on the <**Edit Planogram**> button you will see the following:

- ***Coil:*** This is the selection coil number of the motors in the machine, as provided in a DEX data file from the machine. This number may be different than the selection number on the front of the machine. **NOTE**: The coil number format is very important. When adding new coils it is important to use the same coil number format as shown in the planogram. Below the coil is listed as 3 digits starting with a zero.
- ***UPC Item:*** This will show "00000 – Unknown Item" for the UPC Item until the item is selected from your list of product items.
- ***Price:*** Shows the desired target price of the item. When sales and price data is retrieved from the machine a check of this data is done for the machine price to match the target price in this data field. If both prices do not match an alert is generated. **Note** - The machine price is not settable from the Greenlite application.



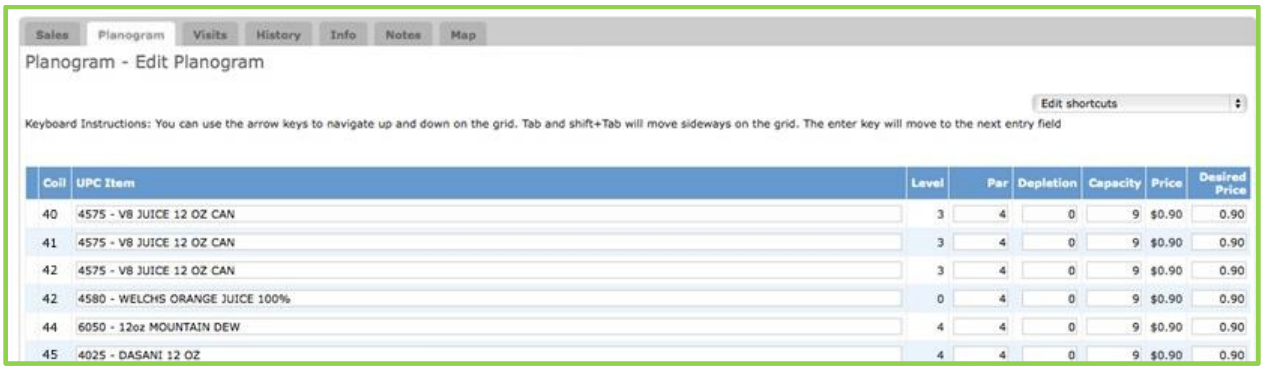
To edit the UPC Item, click your mouse in the area of the Unknown Item and start typing the name of the product. If you have set up your item database with products, the items that contain the description will appear and you can select the needed item. If no database has been set up you can simply type the rest of the description in the line. Continue adding items for the rest of your selections. Remember to click the <**Apply Changes**> button at the bottom or your entries will not be saved.



Editing Greenlite Data Planograms

The *Greenlite Data* includes several options not available in the *Greenlite* program. These include Importing and Exporting Planograms, Grouping Coils, Assigning Templates and Adjusting Desired Inventory Levels.

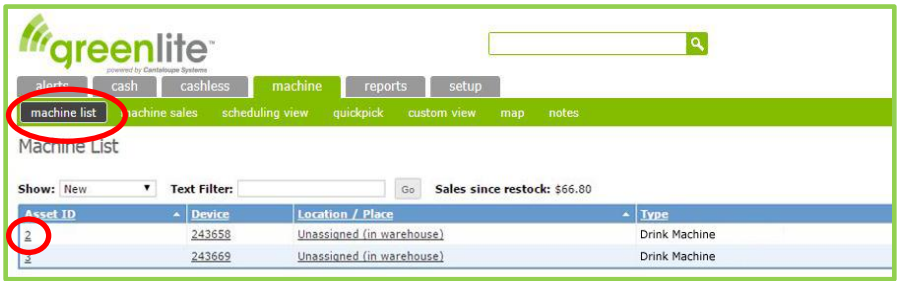
As in *Greenlite*, the *Greenlite Data* planogram is automatically populated from the DEX information reported from the machine and will at first display the default identifiers. You can edit these fields by clicking the <Edit Planogram> button and clicking inside the areas you want to modify.



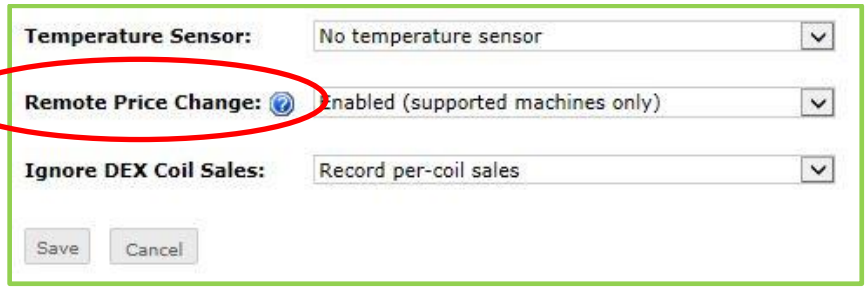
Coil	UPC Item	Level	Par	Depletion	Capacity	Price	Desired Price
40	4575 - V8 JUICE 12 OZ CAN	3	4	0	9	$0.90	0.90
41	4575 - V8 JUICE 12 OZ CAN	3	4	0	9	$0.90	0.90
42	4575 - V8 JUICE 12 OZ CAN	3	4	0	9	$0.90	0.90
42	4580 - WELCHS ORANGE JUICE 100%	0	4	0	9	$0.90	0.90
44	6050 - 12oz MOUNTAIN DEW	4	4	0	9	$0.90	0.90
45	4025 - DASANI 12 OZ	4	4	0	9	$0.90	0.90

- ***Coil:*** This is the coil number of the motors in the machine that was reported by the DEX download.
- ***UPC Item:*** (Default is 0000 – Unknown Item). You can edit this field by clicking in the area and typing a new item or selecting an item from your item list. The items will be presented automatically if you have populated your item list database. **NOTE:** If the machine selection coil configuration is changed and a selection coil is no longer used then the description "non-existent coil" should be used in the UPC Item field. This will remove the selection from the displayed planogram
- ***Level:*** This shows the number of products left in the machine selection since last restock. In initial setup this will read zero.
- ***Par:*** This is the number of products you will be filling up to the next time you restock the machine. Example- If filling to the maximum of an 18 count selection, you will use 18 in this column. If only filling the selection half full you will use 9 in this column.
- ***Depletion:*** This column contains the lowest number of items contained in the selection before you are alerted to restock. **NOTE:** This level is connected to the alerts system. If a selection sells down to the depletion level you will receive an alert in your alerts tab.
- ***Capacity:*** You will add the actual capacity of the selection in this column. If a selection has a maximum capacity of 18 items you will use the number 18.
- ***Price:*** This column is populated by the DEX information from the machine and shows what the price is currently set at the machine.
- ***Desired Price:*** This column lets you set the desired price for the product. **NOTE:** The price can be remotely set from the Greenlite Data application. See below for remote price changes.

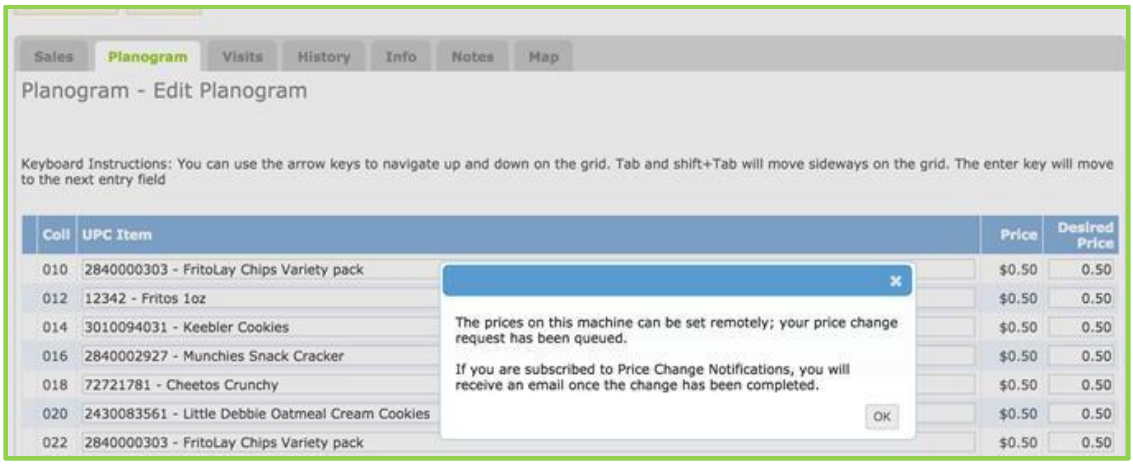
Remote Price Changes: *(Greenlite Data Only)* If you are using Greenlite Data you have the option to update the prices remotely. For each machine you wish to implement remote pricing you will first need to be set by editing the machine's information. This is accomplished by selecting the Machines Tab then the Machine List.



From the Machine List you will select the Asset ID number of the machine you wish to apply the remote pricing setting. Click the Edit Machine Info Button then select Enabled (supported machines only) from the drop down menu. To disable remote pricing select the Disable option from the menu.



You may now update pricing remotely for that machine within its planogram in the Desired Price column. After clicking the Apply Changes button at the bottom of the window you will get a pop up window confirming that your price change request has been queued and your price changes will be applied at the next check in. A red asterisk (*) will appear next to the price noting that the price has yet to be changed at the machine level. When the machine checks in and prices are updated the asterisk will be removed. This is a quick visual check to confirm the price change has occurred.



If you wish to receive notification when the price change has been completed you must set it up under Operator Notifications *(See Notification Setup > Remote Price Change Notifications Section).*

Saving Greenlite Data Planograms

After modifying your items, levels and pricing you can elect to apply this planogram change to the machine in two ways.

- Apply this planogram change at the next machine Restock by checking the check box, as shown below. The website will then show the planogram changes as pending until Quickpick is scheduled and the Restock button is pressed in the machine.
- Apply the changes now by selecting the <Apply Changes> button.

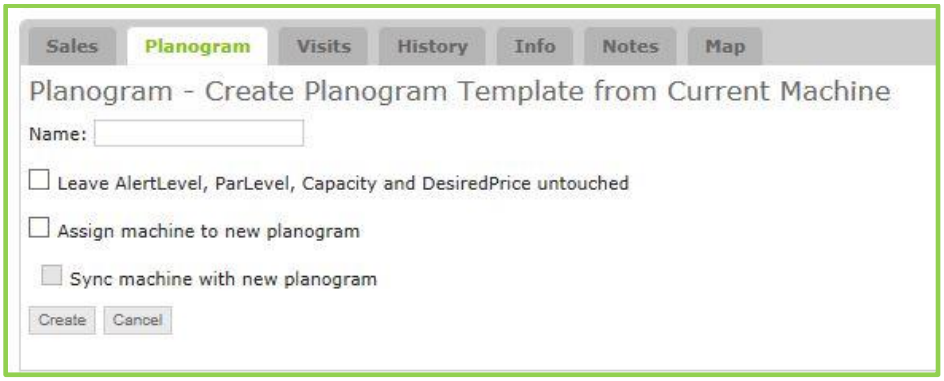
NOTE: When setting up a Planogram for the first time the selections are shown as "00000 – Unknown Item"

Coil Groups

This Feature allows you to group motors together for selections that need more than one motor to vend the item. Example - Combining drink machine coils to one selection. Select the Coil Groups button under planogram and then choose a coil group in the first column from the drop down menu. Coils can be grouped From A to Z or from 1 to 9. Select the group letter or number and assign it for each coil group. Then click the Apply Changes button.

Create a Template

This allows you to create a Planogram template from a machine that you will use across multiple machines.

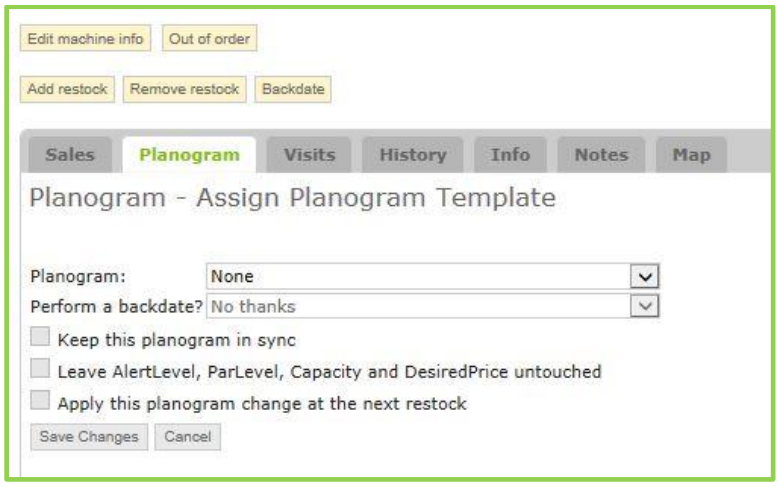


You can name your template with whatever naming convention that makes sense for your business. You will be applying the template later so it should be simple and easy to remember.

You have the option to Leave the AlertLevel, ParLevel, Capacity and DesiredPrice columns untouched as well as syncing the machine with the new planogram.

Assign Template

Use this to apply a template you created to another machine. When editing a machine click the <Assign Template> button.



You can then choose a Planogram you created earlier from the pull down menu. You can also elect to add some modifiers to the planogram:

Perform Backdate: Backdate to a pre previous restock date. Backdate is updating the items sold from "unknown items" to the actual products/items entered from beginning or specific day and time.

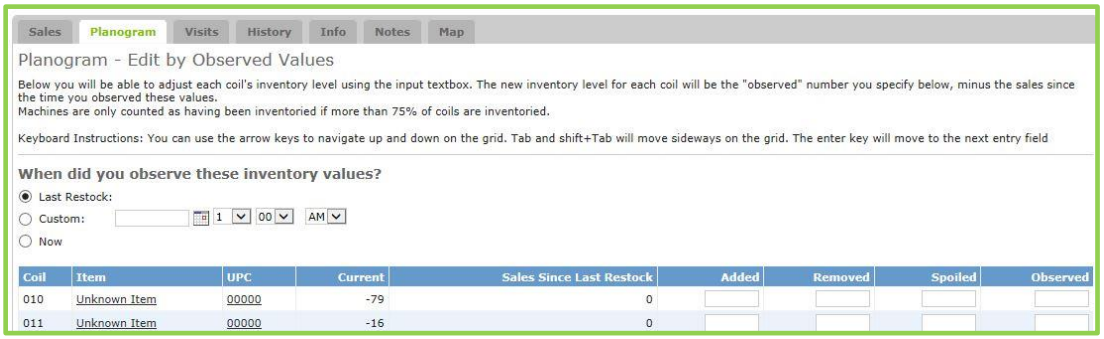
Keep this planogram in sync: Syncing a planogram allows you to make a change to the planogram template found in setup>planograms for all the machines using the template at the same time.

Leave AlertLevel, ParLevel, Capacity and DesiredPrice untouched: This lets you change Product UPC and Product Name without affecting the AlertLevel, ParLevel, Capacity and DesiredPrice fields.

Apply this planogram change at the next restock: When the red <RESTOCK> button on the Greenlite device inside the machine is next pushed, this new planogram will be applied. This allows you to keep a more accurate account of your inventory and sales data while you are in route to restock the machine to your new planogram.

Adjust Inventory

This function lets you adjust each coil's inventory level. Inventory drift may occur for some machines due to various reasons and on occasion product may not be placed in the machine due to out of stock or stale or spoiled product. This feature as name implies allows you to adjust the inventory if necessary. The new inventory level for each coil will be the "observed" number you specify, minus the sales since the time you observed the values.

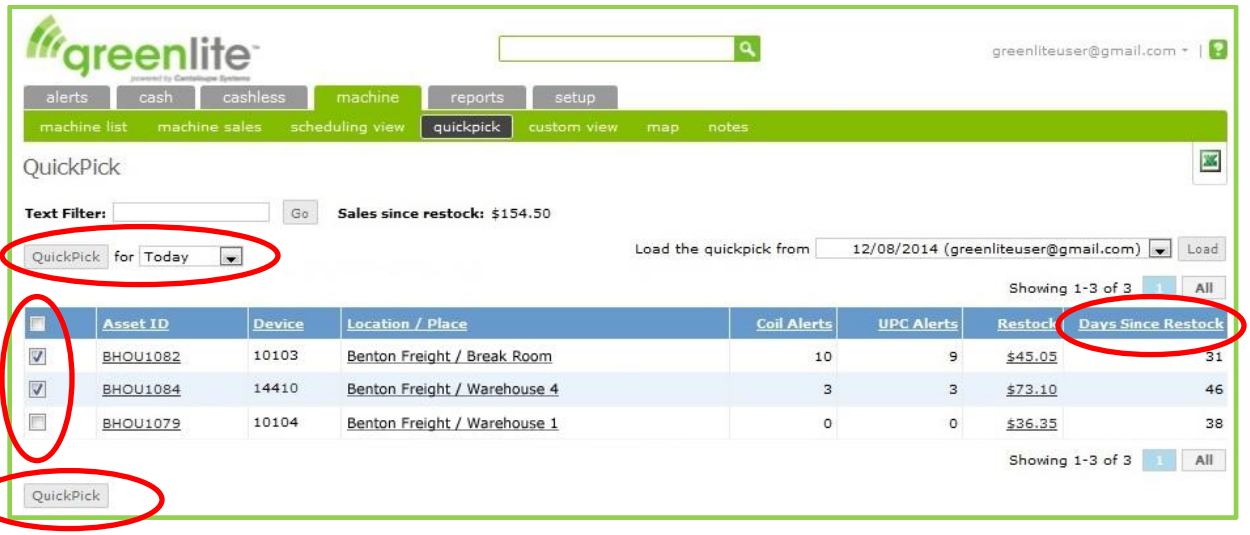


Quick Pick

QuickPick makes it easy to schedule only machines that need service. See real-time indicators of depletion, sales since restock, and days since restock for each machine. This makes it easy to schedule the highest-priority machines. After machines are selected for service, Greenlite Data generates a pick list of which products and quantities are needed for each machine, plus totals that can be used for truck loading. The results: only one trip from the truck to each machine, less extra product on the truck, less spoilage, and lower fuel costs.

Start by clicking on the Machine Tab and then the <QuickPick> tab.

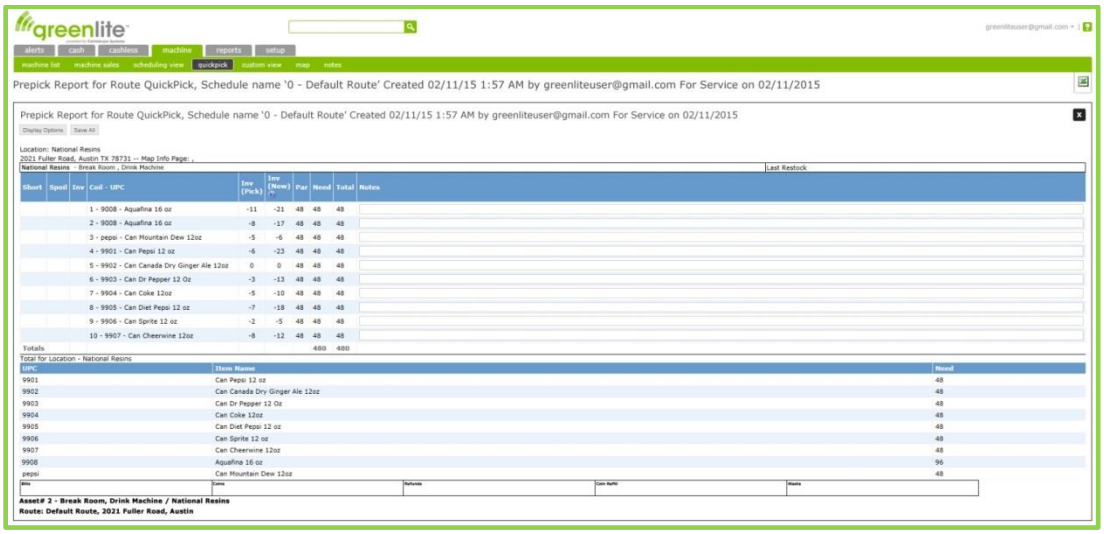
You will be presented by a screen that shows you your machines and information about them including Coil alerts, UPC Alerts, Amount in Money to fill to Restock, and Days Since Restock. This information allows you to plan what machines you will restock and which ones you can restock at a later date. By clicking under the tiles in the columns you can re-order the columns (Example – If you want to see what machines are the oldest since restock you can click on the Days Since Restock description and it will order it from oldest to newest.)



You can select the machines you wish to restock by clicking on the boxes to the far left. If you want to generate QuickPicks for all the machines, just click the box in the top blue header. This will select all machines.

You can generate QuickPicks for Today or Tomorrow. In the drop down area below the Filter, you can select leave the selection as Today, or click the drop down menu to pick for tomorrow.

Finally click on the QuickPick button in the lower left. When you do this, you will generate Quick Pick Lists for all the machines you've selected.



There are three different areas of the Quick Pick displayed. This same display can simply be printed. The exact same fields will print out on three separate pages.

Prepick Report for Route QuickPick, Schedule name '0 - Default Route' Created 02/11/15 1:57 AM by greenliteuser@gmail.com For Service on 02/11/2015

Location: **National Resins**

2021 Fuller Road, Austin TX 78731 -- Map Info Page: ,

National Resins - Break Room , Drink Machine							Last Restock	
Short	Spoil	Inv	Coil - UPC	Inv (Pick)	Inv (Now)	Par	Need	Total
			1 - 9008 - Aquafina 16 oz	-11	-21	48	48	48
			2 - 9008 - Aquafina 16 oz	-8	-17	48	48	48
			3 - pepsi - Can Mountain Dew 12oz	-5	-6	48	48	48
			4 - 9901 - Can Pepsi 12 oz	-6	-23	48	48	48
			5 - 9902 - Can Canada Dry Ginger Ale 12oz	0	0	48	48	48
			6 - 9903 - Can Dr Pepper 12 Oz	-3	-13	48	48	48
			7 - 9904 - Can Coke 12oz	-5	-10	48	48	48
			8 - 9905 - Can Diet Pepsi 12 oz	-7	-18	48	48	48
			9 - 9906 - Can Sprite 12 oz	-2	-5	48	48	48
			10 - 9907 - Can Cheerwine 12oz	-8	-12	48	48	48
Totals							480	480

The first area at the top of the pick shows the information about the machine location and the route, the date created, the user that created the pick and the date for which the service was scheduled for.

Next the Location is displayed along with the location address.

Followed by the placement of the machine within the location and its machine description.

The pick information continues showing several information columns. The first three columns are blank and are used to record the shortages, spoiled product and Inventory while at the location.

Short: This column is left blank and is used while at the location to record the number of items that may have been sold between the time you picked your product and the time you restocked the machine. Example – You picked 11 products but 2 were sold while you were in transit so you would record the 2 items in this column so you can adjust when you return.

Spoil: This column is left blank and is used while at the location to record information on the number of spoils removed from the selection.

Inv: This column is left blank and is used while at the location to record the ending inventory if the driver is required to inventory the machine.

The next columns are information generated on the items you need to prepare to take to the equipment. This information was generated using the planogram you previously set for the machine.

Coil-UPC: Displays the coil number, the UPC of the product and the description of the product.

Inv (Pick): This is the level of inventory of the selection at the time the Quick Pick was generated

Inv (Now): Displays the current inventory at the machine.

Par: Shows the par level of the machine.

Need: This is the amount of product needed to get the selection back to Par.

Total: Displays the total units needed.

The second page that prints is a quick glance at the items needed.

Total for Location - National Resins

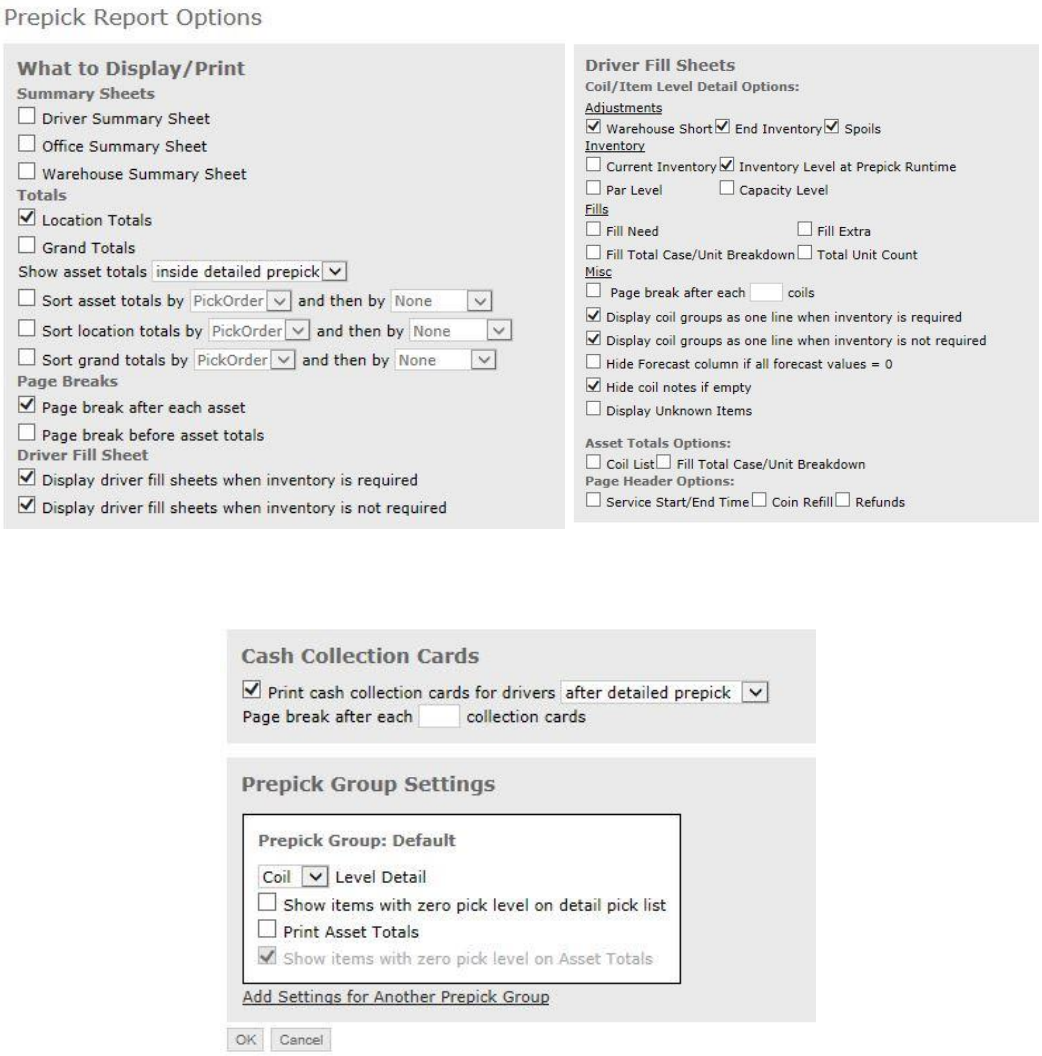
UPC	Item Name	Need
9901	Can Pepsi 12 oz	48
9902	Can Canada Dry Ginger Ale 12oz	48
9903	Can Dr Pepper 12 Oz	48
9904	Can Coke 12oz	48
9905	Can Diet Pepsi 12 oz	48
9906	Can Sprite 12 oz	48
9907	Can Cheerwine 12oz	48
9008	Aquafina 16 oz	96
pepsi	Can Mountain Dew 12oz	48

The last page that prints out is a monetary slip that can be used to record Bills, Coins, any Refunds paid out, Coin Refills and Waste.

Bills	Coins	Refunds	Coin Refill	Waste

Asset# 2 - Break Room, Drink Machine / National Resins
Route: Default Route, 2021 Fuller Road, Austin

The QuickPick reports are customizable to show as much or as little as needed.



Daily Operations

IMPORTANT

Every time you restock a Greenlite-equipped machine, you must press the RED <RESTOCK> button on the Greenlite Device inside the machine upon completion of the service. This will transmit the current cashless-sales amount to your server (along with complete DEX information), and also provide a time-stamped notification to the system that this machine was just serviced.

Basic Machine RESTOCK Procedure Using Greenlite

The Greenlite software will provide the ***cash and cashless sales totals*** for each restock (each machine service). To get this value:

- Instruct your route drivers to ***press the <RESTOCK> button*** on the machine's orange box ***upon completion*** of each machine service. This lets Greenlite know that the machine is being serviced.
- At the end of the day, you can log into your Greenlite website account and view the ***Cashless Sales Analysis Report*** in order to get the cashless sales total at each of your machines

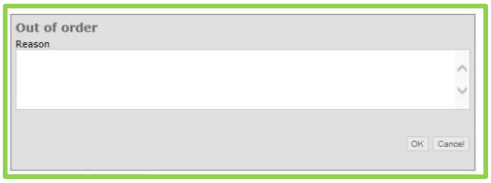
  Note: If you desire, you can export this report in Excel (.CSV) format as needed. Look for the symbol You may want to sort the report by Asset ID to help in quick organization.

Press <RESTOCK> button after each restock of machine and before closing and locking door.

Note: For companies that *are* using handheld computers to capture DEX data at each machine service, the cash and cashless sales total for each service is included in the DEX data stream, so it will not be necessary to print the report and type in the cashless sales totals. However, even when using handhelds, ***it is always necessary to press the <RESTOCK> button*** on the machine's Greenlite Telemetry Device (orange box) upon completion of each machine service.

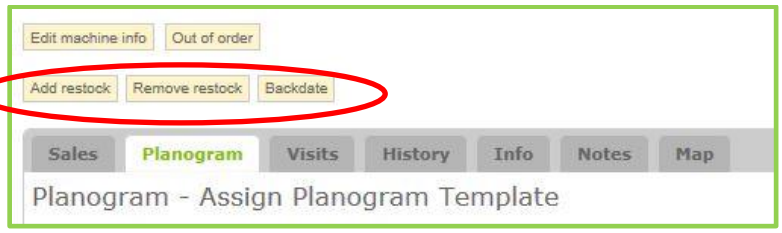
Out of Order

If for some reason the machine is out of order, you can add the reason by selecting Machine List Tab, clicking on the Asset ID of the machine and clicking the <Out of Order> Button and entering the reason in the note field. Click ok after entry to save the note.



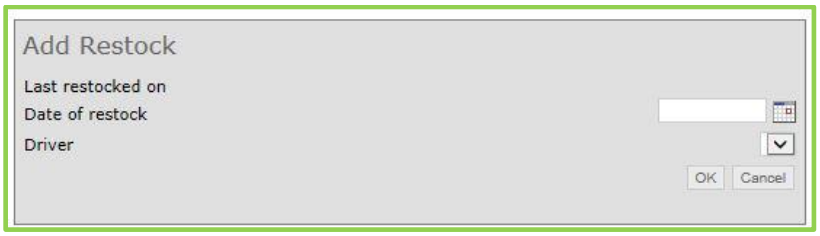
Add Restock, Remove Restock & Backdating

If you are a *Greenlite Data* user, your planogramming features are expanded to features that help you maximize your time and efficiencies. Sometimes you or your route driver may forget to push the <RESTOCK> button after restocking the machine. The Greenlite Data application allows you to add a restock date remotely so that your totals can be adjusted correctly. It also allows you to remove a restock date and backdate.



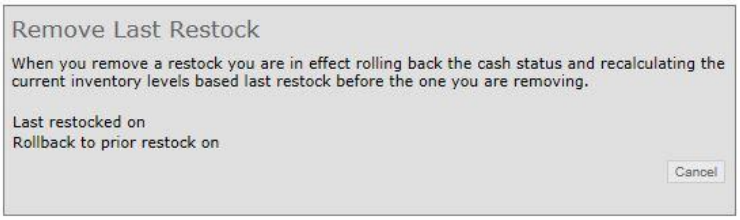
Add Restock

Lets you add restock dates for the machines. If for some reason you or your driver forgot to press the RED <RESTOCK> button on the Greenlite device after restocking the machine you can add a restock date remotely.



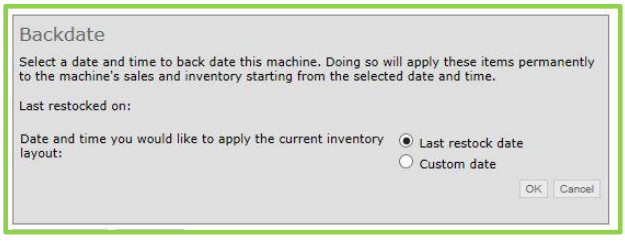
Remove Restock

Lets you remove the last restock. This will roll back the cash status and recalculate the current inventory levels based on the last restock before the one you are removing.



Backdate

Allows you to backdate machine sales inventory starting from the selected date and time. Click the <Backdate> button and either select the Last restock date or Custom date radio button. Selecting the Custom date lets you set the date and time of the backdate.



System-Wide Features

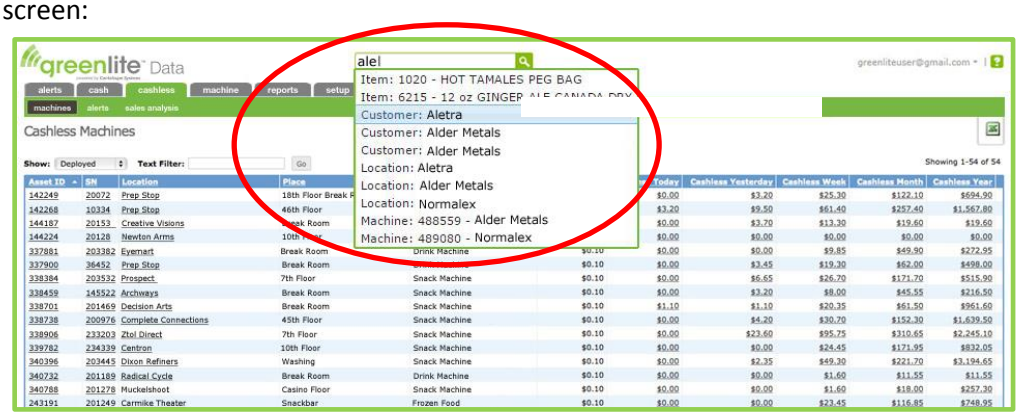
Here are a few useful features of the Greenlite software that you will see throughout the system, on any listing or report that you may bring up on your computer screen:

Underlined Text: An underscore of any text in an on-screen report, chart, or listing indicated a clickable link. Simply mouse-click on any underlined text for more information on the selected entity.

For example, if you click on an underscored Asset ID, that machine's complete asset-maintenance screen (the screen we've seen earlier, where you can enter and/or edit machine information) is displayed. Clicking an underscored customer name will reveal that customer's basic information, including address, etc.

Column Headings: On any onscreen listing or report, you can click any column heading to sort the entries (rows) in alphanumeric order by the entries in the selected column. Click a second time to re-sort the entries in reverse alphanumeric order.

Search Box: Every screen display in the Greenlite system features a search box prominently displayed at the top center of the screen:



When you need to locate any machine, customer, location, etc., enter any sequence of characters (any number, code, word, fragment of a word, etc.).

As soon as you type one character, a dropdown list appears, including every element of the system containing that character; as you continue to type, fewer and fewer items appear on the list as the number of matches is narrowed down. Complete your entry either by *typing the entire word/code* or by *selection from the dropdown* as soon as the desired entry becomes visible on the list (e.g., after typing 3 or 4 characters). Then click the spyglass icon to search out every item in the database containing that sequence.

Device Management

One of the most important aspects in the Greenlite Application is activation of the Greenlite Device. If the device is not activated it will not report ANY data. Even if your machine has shipped with the Greenlite device installed, you will still need to follow the steps below

- **Select the Setup Tab** and then select *<Devices>.* You will be presented with a view of all the Greenlite Devices available for Activation. These devices are displayed with the ID number that is printed on the serial tag of the device installed in your machine(s). There is a Select All check box which you can use to Activate ALL of those particular devices. It is recommended that you Activate only those devices that you are ready to implement within 72 hours as each device Activated will begin to accrue air-time service charges as soon as it is Activated (see below for a detailed explanation of when and how air-time service charges apply).

- Click on the check box next to each device that you wish to Activate and then click the check box labeled *I understand and accept the Terms of Activation.* Next, click on the Submit button and the devices checked off will be submitted for Activation. **Please note that this process can take up to 24 hours.** The importance of submitting devices for Activation at least 24 hours in advance cannot be emphasized enough.

Some things to keep in mind when Activating devices:

- When you Activate a device, there is an activation Fee. This is in addition to the monthly Greenlite service fee and is charged once each time you activate a device.
- Monthly Greenlite service fees begin accruing the moment you Activate the device with first swipe of a card, tap with a card or tap with mobile phone.
- Greenlite service fee includes:
    - Access to the Greenlite Web Application
    - All communication fees
    - Basic Greenlite support
- The first month is not prorated and will be billed at the end of the month. Payment is due on the 30th of the following month, e.g. in June you will receive a bill for May, and the bill is payable by June 30th.
- The air-time service fee is billed each month that the device is Active.
- If a device is not reporting, it is incumbent on the customer to deactivate and/or submit for RMA if the device is deemed to be malfunctioning. Cantaloupe will not credit customer for monthly fees, only for the Activation fee in case of RMA.
- If you deactivate a device, there will be an Activation fee again upon next Activation of that device. If for example, there are devices installed in machines in a school that will be out for 3 months it may make sense to deactivate those devices, if those schools will be on break for 1 month then it might make sense to just leave the devices Active.

Glossary of Terms

Asset – A Greenlite Device-equipped vending machine.

DEX – (Digital Exchange) DEX is a standard for an ASCII code-based electronic audit file, a way to communicate information such as sales, cash in bill validators, coins in coin boxes, sales of units by selection, pricing, door openings, and much more. It is created either locally by the VMC (Vending Machine Controller often called the "brain" of an electronic machine) or created by a retrofit DEX device in older electromechanical (dip switch) machines.

Handheld – A ruggedized, mobile device designed for the rigors of all-day, every day usage in the field and the office. Handhelds capture the DEX files generated by vending machines including the data for the meter, cash and inventory as well as other machine data for use with compatible data translation applications.

Restock – Refilling or servicing of the machine. In conjunction with Greenlite you will be pressing the red button on the Greenlite device after restocking the machine.

Shorts – Quantity of items that have been sold from a selection between the time of picking your product for restock and the time of actual restock.

Stales – Products that have passed their expiration date for sale.

Merchant of Record (MoR) - is the term credit/debit card payment processor companies use for the company that is responsible for paying equipment and payment processing fees and also directly receives deposits of credit/debit card sales proceeds from machines.

Planograms – A Planogram lists all the products for sale in a machine by Coil (selection) number. Planograming machines will allow you to track product sales by item and their customer desirability.

Universal Product Code (UPC) – A unique assigned to retail merchandise that identifies both the product and the vendor that sells the product. The UPC on a product typically appears adjacent to its bar code, the machine-readable representation of the UPC.