



Route Planning User Guide

V.2.0



Route Planning Tool

General Information

The Route Planning tool helps coffee and vending machine operators efficiently service their machine fleet. This manual provides step-by-step instructions for setting up custom filters, planning and assigning tasks, and monitoring their completion.

Key features include:

- Flexible refill routes: Filter machines by stock levels, expiry dates, and critical products.
- Cash control: Plan encashments and tube refills based on defined thresholds.
- Technical maintenance: Schedule maintenance based on unresolved events.
- Task lists: Set additional tasks and create maintenance routes.
- Filtering options: Filter machines by type, tags, locations, clients, and employees.

Route planning consists of 3 main parts:

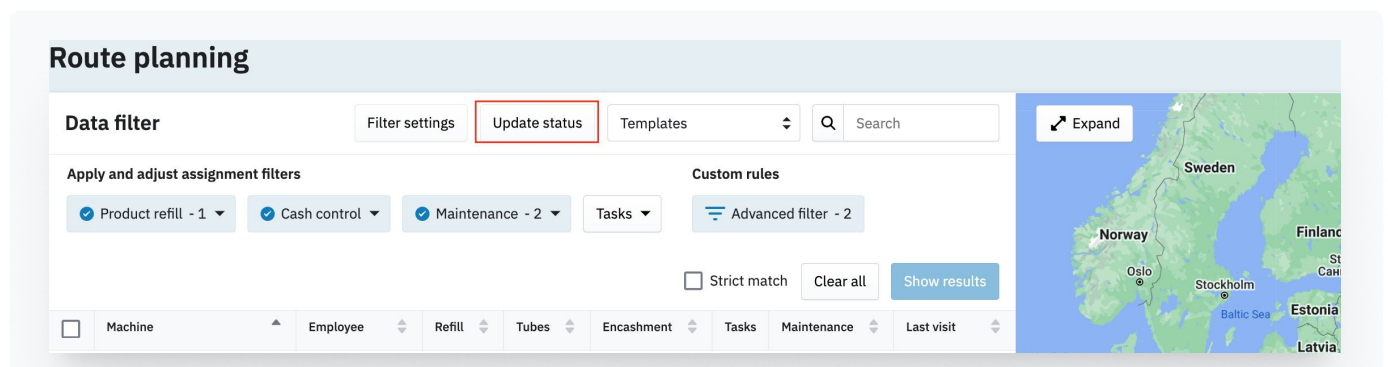
1. Route planning: Filtering machines and setting up routes for employees.
2. Route setup: Customize route planning filters to optimize the planning process.
3. Route list: View and manage existing routes.

Route planning

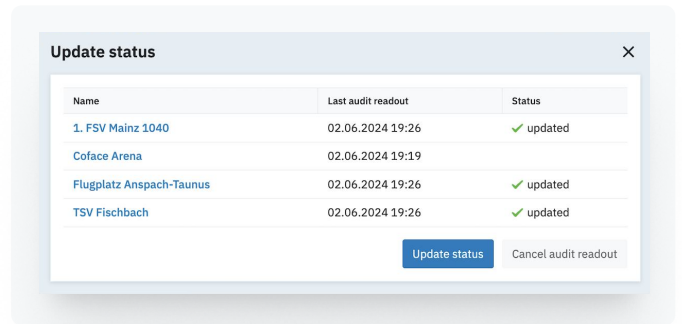
This section covers the tools and features available for planning and optimizing service routes. You'll learn how to update machine statuses, set up filters for route planning, create and manage fixed routes, and visualize machine locations on a map. These features are designed to help you efficiently plan routes and ensure timely servicing of your machines.

Status update

Go to: Planning → Route planning. Before starting to filter out the machines, you can update the status of the machines by reading EVA DTS audit files. Click on "Update status".



Clicking the button will open the list of all machines on the account. Only machines which do not have real-time data, and which are currently online will be updated. Click on the “Update status” button in order to send an EVA DTS audit request to these machines. Once the update is started, it can also be cancelled by pressing “Cancel audit readout”.

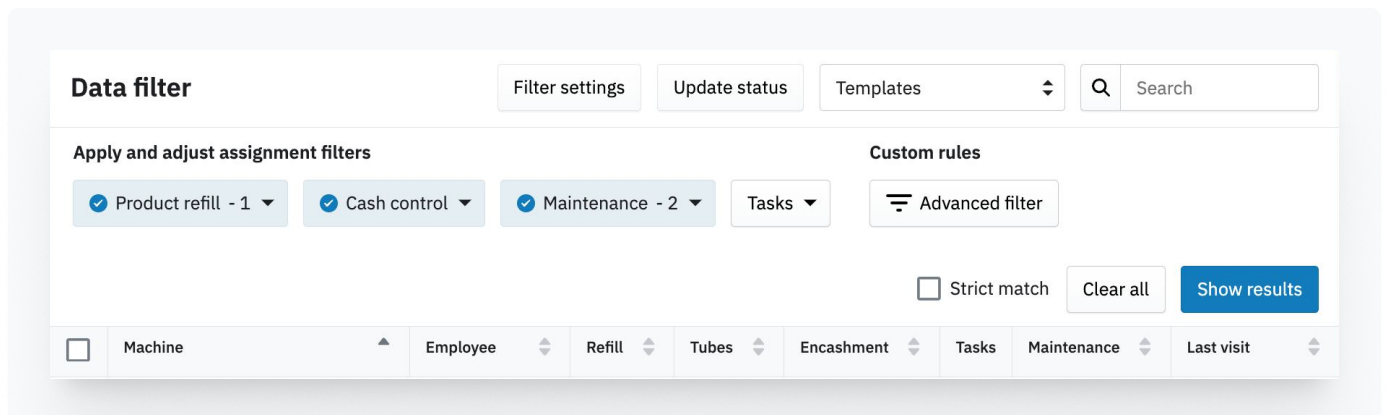


A mechanism has been implemented to prevent multiple successive EVA DTS readouts in case the first update is cancelled midway or another update is requested shortly after the first one. Any audit read within 20 minutes of pressing the button will not be requested again and will be indicated as “updated”.

Route filter setup

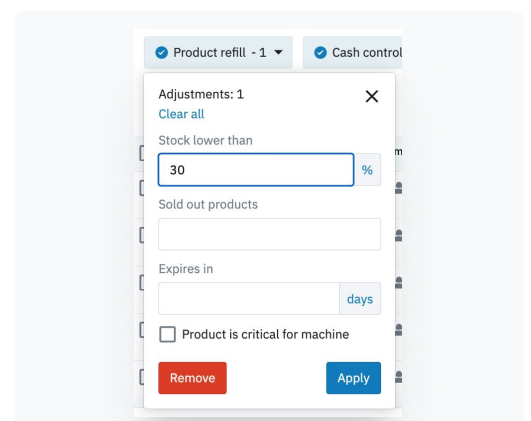
When opening a route planning page by default it shows machines that have reached stock level of 30% or less. Default filter can be changed in Planning → Route Setup → Settings.

To set up a route, filter out machines you want to include in your route. You can either set up filters from scratch or use an already predefined set of filters, available from the “Templates” drop-down if they have been saved.



You can apply Product refill, Cash control and Maintenance task filters without specifying any trigger by simply clicking on the filter button and pressing “Apply”. This will allow you to find all machines that match the given filter.

To set up your own filter templates, click the “Filters settings” button, or proceed to Planning → Route setup. Each filter and trigger is explained in section Task types.



Fixed routes

Fixed routes are suitable for operators who wish to visit the same machines regularly regardless of their stock levels and cash levels. In the route planning tool, fixed route creation is based on machine tags. In order to create a fixed route, start by creating a regular filter by navigating to "Route Setup" → "+New Filter" or start creating a new filter in the Route planning section. Further you can choose specific Employees, Machine tags, Clients, Machine types, Location or Machines to be filtered.

NOTE: The filters are limiting. Thus, if you choose a Client and a Location, you will only get results if this location is assigned to this particular client.

Apply and adjust assignment filters

Product refill ▼ Cash control ▼ Maintenance ▼ Tasks ▼

Custom rules

Advanced filter - 1

Strict match

Advanced filters

Type	Machines	Locations	Warehouses
All ▼	All ▼	All ▼	All ▼
Clients	Employees	Machine tags	
All ▼	All ▼	All ▼	

Holiday calendar Show available machines

Select the machine tags that you wish to include in the route. To tag machines, navigate to Settings → Machines.

EXAMPLE: Tag your machines with the names of the day, for instance, "Monday's Route", "Wednesday's Route" etc. One machine can also contain both tags if this machine is to be visited several times a week. Then, when creating the fixed route, select the particular tag (Monday's Route), choose the route type (refill/cash control/maintenance) and save this filter. When you start planning this route and use your saved filter, you will receive a list of all machines with this tag.

Advanced filters

Type	Machines	Locations	Warehouses
All ▼	All ▼	All ▼	All ▼
Clients	Employees	Machine tags	
Best Vending ▼	Fabio Baten ▼	MONDAY ▼	

Holiday calendar Show available machines

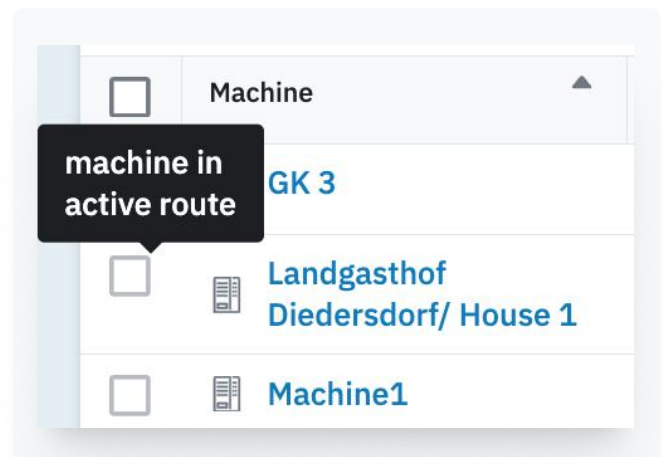
List of machines & warehouses

Once all the filters are in place, click on “Show results” to pick out the machines. If you want to use a different set of filters, just make adjustments to the filter, press save and “Show results” in order to re-apply the filter.

<input type="checkbox"/>	Machine	Employee	Refill	Tubes	Encashment	Tasks	Maintenance	Last visit
<input type="checkbox"/>	Frankfurt Hbf snack machine	0 pers.		€19.50		Check cups		09.01.2024 16:12
<input type="checkbox"/>	1. FSV Mainz 1040	2 pers.				Check cups	Required	27.05.2024 19:33
<input type="checkbox"/>	Berlin Airport Coffee	Tim Selig	<div style="width: 68%;"></div> 68%			Check cups		23.04.2024 20:34
<input type="checkbox"/>	Caffe Newport	2 pers.	<div style="width: 80%;"></div> 80%			Check cups		04.10.2023 17:00
<input type="checkbox"/>	Commerzbank-Arena Coffee	Leo Hoffman	<div style="width: 63%;"></div> 63%			Check cups		30.04.2024 16:04

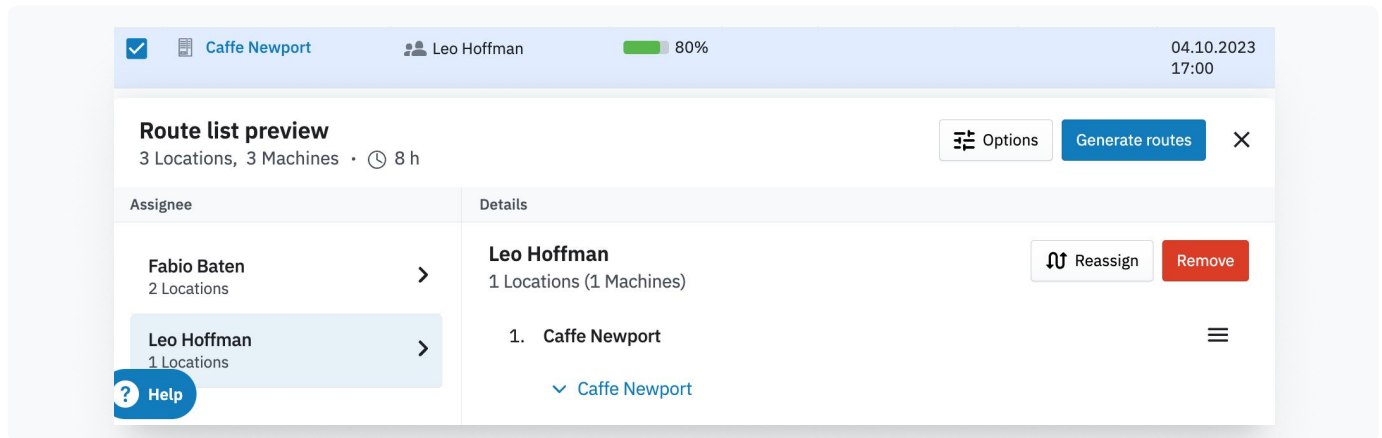
On the main table it will be possible to see all machines which have been picked out according to the selected filters and triggers. Select all or specific machines for inclusion in the route.

- To show up on the table and for the checkbox to be enabled, the machine or warehouse must be assigned to a location.
- If “Show available machines” (under Advanced filter) is disabled, it will be possible to see unavailable machines. However if the machine is not assigned to any location, or it is in an active route it won't be possible to include it in a new route.

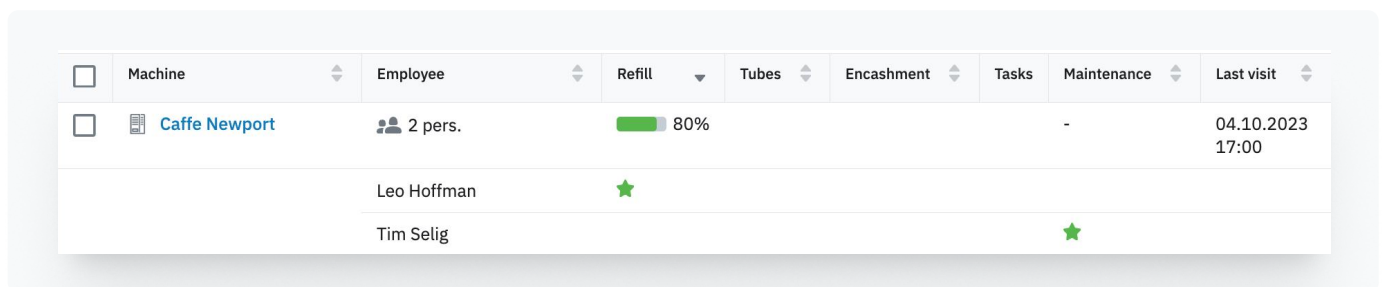


Only machines that are not currently in any active routes, and have assigned location can be selected. Please note that this refers to specific tasks – if a refill task for a machine is in an active route, cash control and technical maintenance tasks CAN be placed in a new route task list.

To view each employee's tasks at a single machine, click on the downward "v" facing arrow in the "Route list preview" tab at the bottom of a page. It will open the list of all locations divided by employee. If the checkbox to the left of the machine name is checked, all available tasks will be placed in the route task list.



In case there are multiple employees performing tasks at a single machine, clicking on the "Employee" column (ex. 2 pers.). This will open details with a list of employees and tasks they are responsible for.



Task types and detail panels

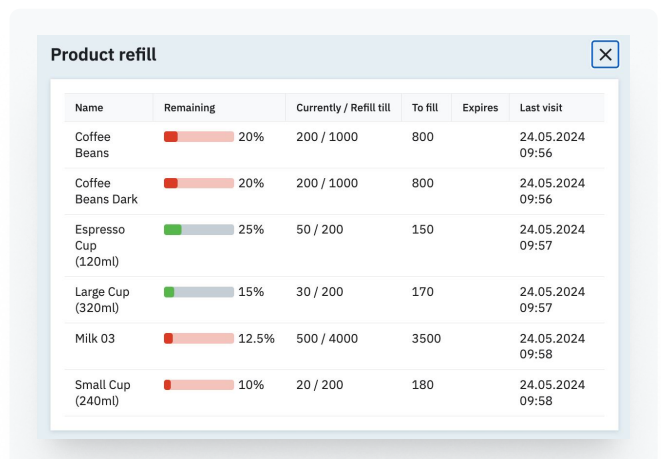
Each task type has a separate details panel to view more information on stock levels, cash details and maintenance issues.

Stock

In the main machine table, stock details are marked by the progress bar and percentage, it reflects the remaining stock in the machine.

Clicking on the refill percentage will open a popup with a stock details panel.

If a machine uses shared stock and is part of a warehouse, it will have a warehouse icon next to the name of the warehouse.



Cash - Tube levels and encashment

The tube column shows the number of coins in the tube. The encashment column shows how much money is in the cashbox. These values will be visible if a cash control filter is used. Selecting these machines will create a coin changer refill task or/and an encashment task. If tube refill values are not set up, the tube column will be empty

Clicking on the numbers will open a popup with detailed info.

The screenshot shows a table with columns: Machine, Employee, Refill, Tubes, Encashment, Tasks, Maintenance, and Last visit. Two machines are listed: 'Test machine' (Employee: Fabio Baten) and 'Rest machine' (Employee: Tanis Rörzins). Two popups are overlaid on the table:

Tubes

Nominal	Remaining	Value	To fill	Refillable value
EUR 0.05	81 / 80	EUR 4.05	0	EUR 0.00
EUR 0.10	70 / 60	EUR 7.00	0	EUR 0.00
EUR 0.20	17 / 60	EUR 3.40	43	EUR 8.60
EUR 0.50	54 / 60	EUR 27.00	6	EUR 3.00
EUR 1.00	57 / 60	EUR 57.00	3	EUR 3.00
EUR 2.00	0 / 0	EUR 0.00	0	EUR 0.00
Total refillable value				EUR 14.60

Encashment

Module	Value to collect
Cashbox	EUR 104.45
Total value to collect	EUR 104.45

Tasks

The tasks column shows the name of the tasks or lists that were selected in the tasks filter. If multiple tasks or lists are selected then it will indicate how many tasks/ lists have been selected. To setup a task or list of tasks, visit Planning → Tasks/ Lists.

Clicking on the numbers will open a popup with detailed info.

The 'Tasks' popup shows a table with columns: No., List name, and Tasks.

No.	List name	Tasks
1	Spring tasks	<ol style="list-style-type: none"> Clean the screen Clean the top of the machine Clean the buttons

Maintenance

Required - in the Maintenance column means that there are unresolved events, and a maintenance task can be created. If the maintenance filter is used and nothing is displayed in the maintenance column that means there are no unresolved events, and a maintenance task cannot be created.

Clicking on the "Required" will open a list of all unresolved events.

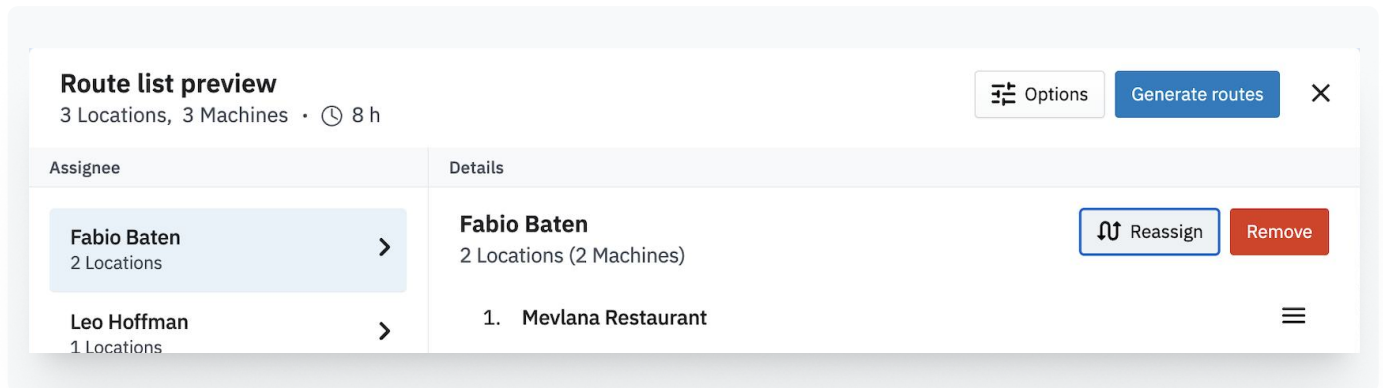
The 'Technical maintenance' popup shows a table with columns: Event, Registered, Source datetime, and Tags.

Event	Registered	Source datetime	Tags
Thermostat	02.06.2024 19:26	02.06.2024 18:49	30MINTEST BESTEST TAG GROUP - TECHNICAL TECHNICAL

Route list preview

To preview the route list that you will be creating and make adjustments you can press on “v” arrow or on “Route list preview”. Opening the Route list Preview tab will show the information of all employees on the left side and list of locations, machines and tasks on the right side.

In case of changes, it is possible to assign machines to different employees by using the “Reassign” function. Tasks can be deleted by clicking on the “X” icon. An assignee with all their tasks can be deleted by clicking the “Remove” button.



In case there are tasks that have not been mapped to specific employees, they will appear in the Assignee column as “Unassigned”. They must be either removed or assigned to employees before a route task list can be generated.

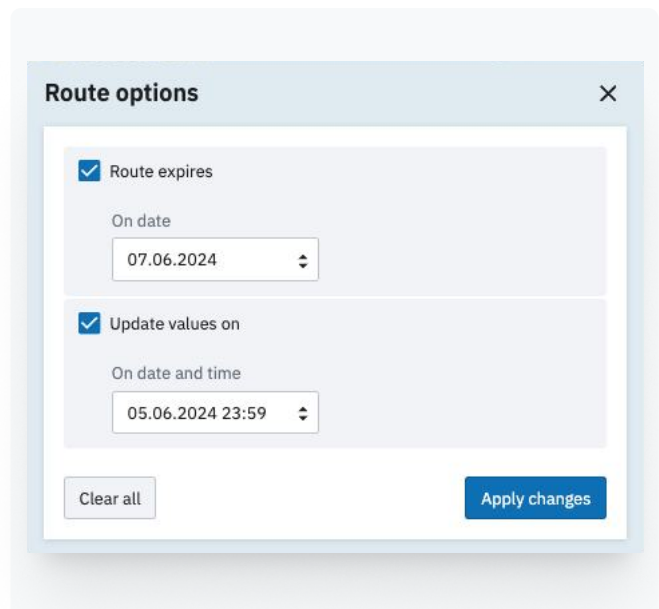
Options

Route expires - go to Options on the bottom of the page and specify the route expiry date (check-mark the box to set the expiry date or leave the box unchecked if it is not necessary to set the expiry date).

If the expiry date is set, once it is reached, the route will no longer be available for fulfilment.

Update values on - you can also choose the “Update values on” option. This will come in handy if you want fresh values when it is time to do the actual picking - so that there is a smaller difference between the products picked and the products missing in the machine.

Mark the checkbox, select the date and time, and the picklist will be updated with the latest values on the specified date and time.

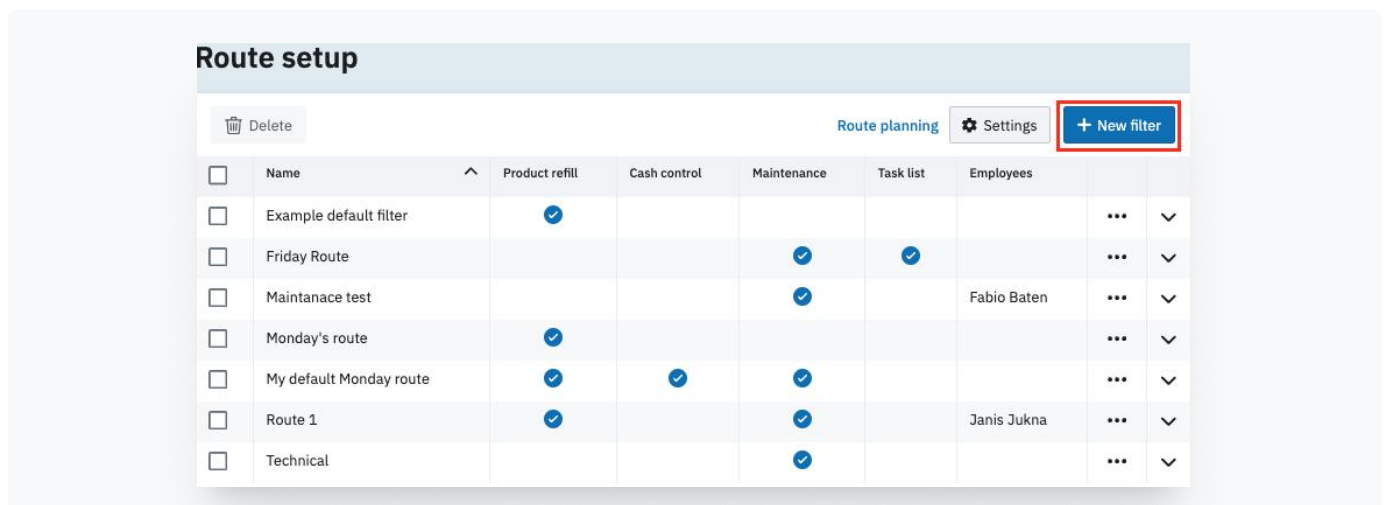


Route setup

The route setup section allows users to define custom filters to facilitate the planning process. Instead of selecting all parameters one by one, a filter with the required conditions can be used, which results in a list of machines that meet the defined parameters and can be further placed in routes. Moreover, any user can set their own default filter to apply automatically in the planning process.

New filter creation

To create a new filter, click on the “+ New filter” button and start with the name of the filter. Then, specify which route tasks should be included in the route. Several task types can be included in a single route: Product refill, Encashment, Tube check, Task list, Technical maintenance.

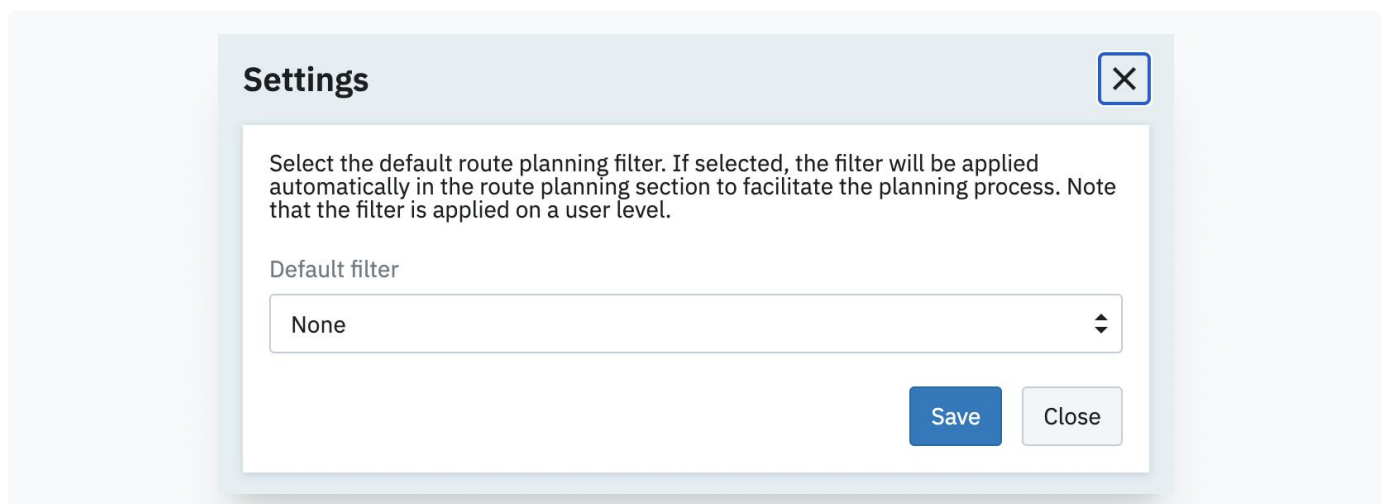


The screenshot shows the 'Route setup' interface. At the top, there is a 'Delete' button, 'Route planning' text, a 'Settings' gear icon, and a '+ New filter' button highlighted with a red box. Below is a table with columns: Name, Product refill, Cash control, Maintenance, Task list, and Employees. The table contains several filter entries with checkboxes and blue checkmarks indicating selected tasks.

<input type="checkbox"/>	Name	Product refill	Cash control	Maintenance	Task list	Employees
<input type="checkbox"/>	Example default filter	<input checked="" type="checkbox"/>				...
<input type="checkbox"/>	Friday Route			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...
<input type="checkbox"/>	Maintanace test			<input checked="" type="checkbox"/>		Fabio Baten
<input type="checkbox"/>	Monday's route	<input checked="" type="checkbox"/>				...
<input type="checkbox"/>	My default Monday route	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		...
<input type="checkbox"/>	Route 1	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		Janis Jukna
<input type="checkbox"/>	Technical			<input checked="" type="checkbox"/>		...

Default filter setup

Go to “Settings” and change the default filter from a list of predefined filters for the Route planning section. This will allow you to immediately filter out machines that require certain service when opening a Route planning section. Press “Save” and the new default filter will be enabled.



The screenshot shows the 'Settings' dialog box. It has a title bar with a close button (X). The main text reads: 'Select the default route planning filter. If selected, the filter will be applied automatically in the route planning section to facilitate the planning process. Note that the filter is applied on a user level.' Below this is a 'Default filter' label and a dropdown menu currently showing 'None'. At the bottom right are 'Save' and 'Close' buttons.

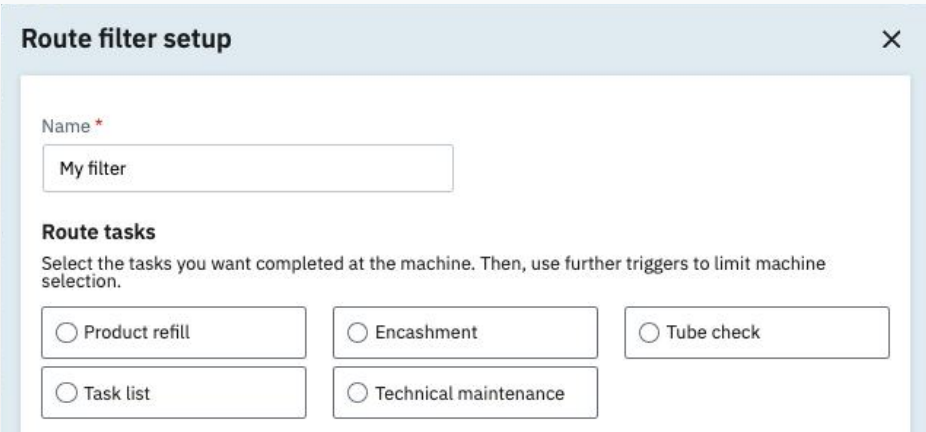
Task types

Selecting “Product refill” without any additional triggers will provide a list of all machines and warehouses that allow any manipulations with their stock.

Selecting “Cash control” (Encashment or Tube check) without any additional triggers will provide a list of all machines that have a coin changer set up in the device settings.

Selecting “Technical maintenance” without any additional triggers will provide a list of all machines that have at least one active event that has not been resolved for more than 3 days.

Selecting “Task list” it is mandatory to add a specific task or to be able to save the filter. The respective task/task list will be added to all available machines or those that match the applied filters.



Route filter setup ×

Name *
My filter

Route tasks
Select the tasks you want completed at the machine. Then, use further triggers to limit machine selection.

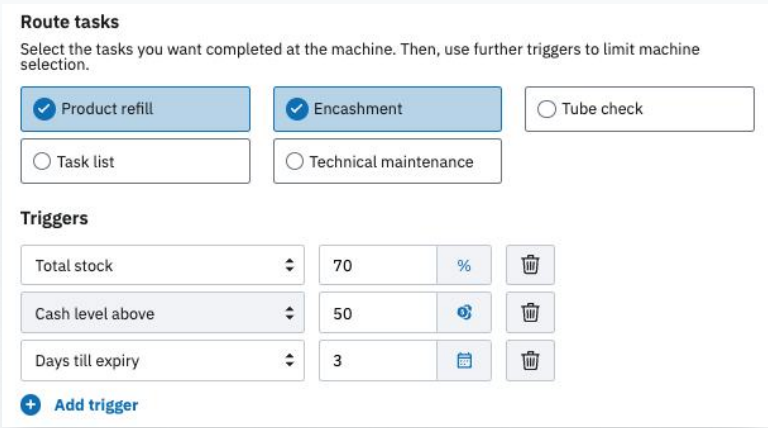
Product refill Encashment Tube check

Task list Technical maintenance

Task triggers

Based on your choice of route tasks, you can select additional triggers which work to narrow down the list of machines.

NB! Task types are combinable, meaning that several task types can be included in a single route. Selecting several task types will not select only those machines for which all tasks are applicable, but machines will be sorted on an and/or basis (at least one applicable task).



Route tasks
Select the tasks you want completed at the machine. Then, use further triggers to limit machine selection.

Product refill Encashment Tube check

Task list Technical maintenance

Triggers

Total stock	70	%	🗑️
Cash level above	50	🔔	🗑️
Days till expiry	3	📅	🗑️

[+ Add trigger](#)

Product refill triggers

- Total stock - This trigger allows to filter out all machines that have reached a certain stock level percentage. For example if set 30% it will filter all machines that have a total stock level of 30% or lower.
- Expiration date - Machines with products approaching the expiration date can be filtered out. The system will look for machines with products expiring up to the number of specified days (for 3 days, the expiration date within 0, 1, 2, 3 days will be selected), and will also include machines with already expired products. Note: Expiration dates can be set in the Stock tab of the machine account.

The screenshot shows a 'Triggers' configuration panel with four rows. Each row has a dropdown menu on the left, a text input field in the middle, and an icon on the right. The first row is 'Total stock' with a value of '70' and a percentage icon. The second row is 'Days till expiry' with a value of '3' and a calendar icon. The third row is 'Empty facings' with a value of '1' and a bottle icon. The fourth row is 'Product is critical for machine' with a trash can icon.

Trigger	Value	Icon
Total stock	70	%
Days till expiry	3	Calendar
Empty facings	1	Bottle
Product is critical for machine		Trash

- Empty facings - This trigger allows you to select machines where a specific number of products have been sold out.
- Critical product - Machines with any products or components marked as “Critical” will be included in the route if the critical product reaches the specified critical level. Note: Products and components can be marked as critical in device accounts under “Settings”.

Cash control triggers

- Cash level above - “Cash level above” trigger may be used to specify the threshold of money in the bill stacker and cash box available for encashment.
- Critical tube levels - “Critical tube level” – applicable to accounts where the coin changer’s critical tube levels have been specified.

The screenshot shows a 'Route tasks' configuration panel. It has a title 'Route tasks' and a subtitle 'Select the tasks you want completed at the machine. Then, use further triggers to limit machine selection.' Below this are five radio button options: 'Product refill', 'Encashment', 'Tube check', 'Task list', and 'Technical maintenance'. 'Encashment' and 'Tube check' are selected. Below the tasks is a 'Triggers' section with two rows. Each row has a dropdown menu, a text input field, and an icon. The first row is 'Cash level above' with a value of '50' and a gear icon. The second row is 'If tube level is critical' with a trash can icon.

Task	Selected
Product refill	<input type="radio"/>
Encashment	<input checked="" type="radio"/>
Tube check	<input checked="" type="radio"/>
Task list	<input type="radio"/>
Technical maintenance	<input type="radio"/>

Trigger	Value	Icon
Cash level above	50	Gear
If tube level is critical		Trash

Technical maintenance triggers

- Event tags - it is possible to specify which active events should be filtered out. This is done by using event groups (tags) and event duration.
- Days unresolved - will filter out machines that have unresolved events for a specified number of days.

Task or list triggers

When the task type “task list” has been selected, you must select a task or a task list from the “tasks” dropdown. This dropdown lists all tasks/lists that have been set up on your account. If there are none, proceed to Planning → Task/Lists and set them up there.

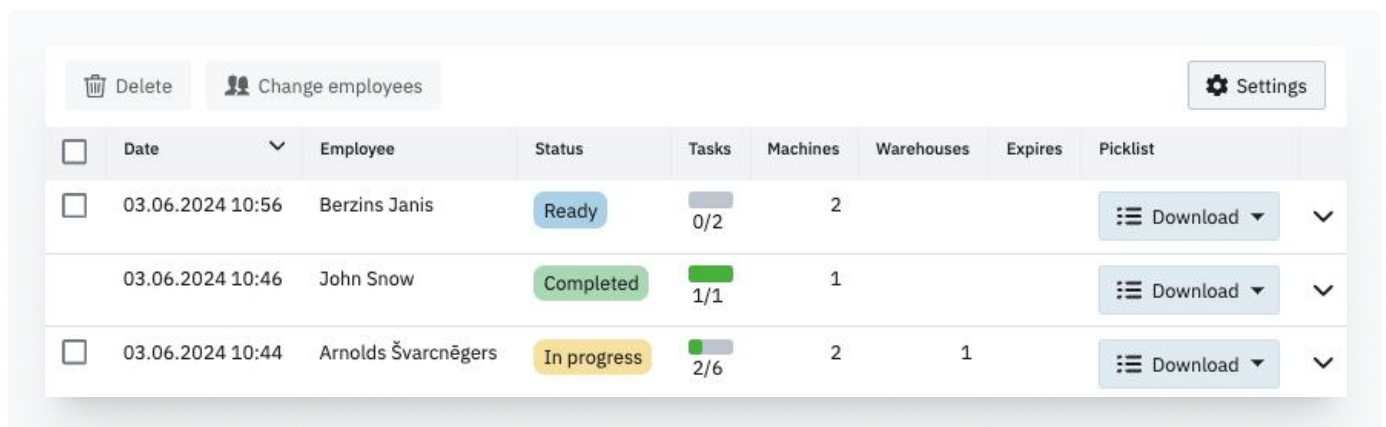
Additional filters

- Location calendar - any task types can be filtered according to the location calendar – depending on when the location is closed for a longer time period, it can be excluded from route planning. Location holidays can be specified under Settings → Locations. Mark the locations you want to set holidays for, and press “Manage holidays”; then input the holiday period.
- Show available machines - show only those machines that can be placed in a route - machines that are not in another active route and have a location mapped.
- Enable strict match - enable limiting filters that make sure all machines match all triggers.

Route list

Route list focuses on managing and reviewing the lists of planned routes. You’ll learn how to sort and filter route lists, download picklists, check route summaries, manage stock levels and more.

Go to: Planning → Route list. This will open the list of routes and provide information on the employee, number of machines/warehouses in the route, status, route progress and also download the picklist or pre-kitting list (warehouse pack list). If you need to assign one or more tasks to another employee due to their absence, use the “Change employees” function above the table.



<input type="checkbox"/>	Date	Employee	Status	Tasks	Machines	Warehouses	Expires	Picklist
<input type="checkbox"/>	03.06.2024 10:56	Berzins Janis	Ready	0/2	2			Download
	03.06.2024 10:46	John Snow	Completed	1/1	1			Download
<input type="checkbox"/>	03.06.2024 10:44	Arnolds Švarcnēgers	In progress	2/6	2	1		Download

Summary

Check the details of a specific route by clicking on the arrow pointing downward. This will open a route summary with a list of machines/warehouses in the route. Here you can rearrange the order for the machines using the drag and drop function and delete unnecessary tasks or machines from the route if it has not been started. Check on the progress of the route on the Task progress bar. If the route has an update scheduled, you can also cancel the previous update and execute it now. Just press the “Update now” button, and you will have fresh values in 10 minutes’ time.

When a machine is serviced – i.e., the task type assigned has been completed – a green “Completed” sign will appear, along with the date and time.

The screenshot shows the 'Summary' tab of the application. It features a navigation bar with 'Summary', 'Cash control', 'Maintenance', and 'Tasks'. Below the navigation bar, there are two route entries. The first entry is for 'Berlin Tegel Airport' with the address 'Schwarzer Weg, Saatwinkel, Tegel, Reinickendorf, Berlin, 13507, Germany'. It contains a table with columns: Machine, Task, Status, and Visit time. The table shows one row: 'Airport Berlin' with task 'Cash control' and status 'Informative'. The second entry is for '1. FSV Mainz 05' with the address 'Athener Allee, Hechtsheim, Mainz, Rheinland-Palatinate, 55129, Germany'. It also contains a table with columns: Machine, Task, Status, and Visit time. The table shows one row: '1. FSV Mainz 1040' with task 'Cash control' and status 'Informative', with a visit time of '03.06.2024 08:09'. There are 'Delete' and 'Collapse all' buttons at the top of the summary view.

Stock

The stock report lists the planned stock per product for all machines in the route. “Total refill “ shows the total amount of stock needed to refill all machines in the route. By clicking on the “Picklist by machine” button, you can view stock by machine and change the amount to be refilled for each product and change the refill template if necessary.

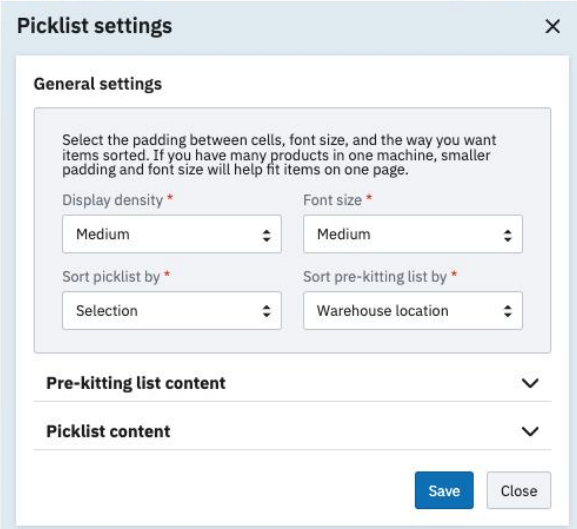
Refill tasks are resolved when the refill button is clicked either in the app, on the web, or on the vBox itself. Progress can be tracked in the Summary tab.

The screenshot shows the 'Stock' tab of the application. It features a navigation bar with 'Summary', 'Stock', and 'Tasks'. Below the navigation bar, there are buttons for 'Delete', 'Total refill', 'Picklist by machine', 'Settings', and 'Refresh values'. The main content area shows a stock report for 'Marmaris Restaurant'. It includes a dropdown menu for 'Automatic refill'. Below this is a table with columns: Product, To fill, Remaining, Amount, Max, Critical, Refill unit, and Location. The table shows two rows: 'Beans 1' and 'Beans 2'. Both rows have a 'To fill' value of 1000, a 'Remaining' value of 0%, and an 'Amount' of 0. The 'Max' value is 1000, the 'Critical' value is 200, and the 'Refill unit' is 1. There are checkboxes in the 'Product' column for each row.

Picklist settings

You can customise the PDF format of the picklist and pre-kitting list under Settings above the table:

- How the products must be sorted in the picklist and pre-kitting list.
- Display density - padding between text
- Font size.
- Content - by choosing columns you want to see and hide.



Picklist settings [X]

General settings

Select the padding between cells, font size, and the way you want items sorted. If you have many products in one machine, smaller padding and font size will help fit items on one page.

Display density * [Medium] Font size * [Medium]

Sort picklist by * [Selection] Sort pre-kitting list by * [Warehouse location]

Pre-kitting list content [v]

Picklist content [v]


[Save] [Close]

Cash control

The cash control tab lists coin changer refill and encashment tasks.

Total cash - provides values for all machines.

Cash by machine - Provides values per machine.



Machine
Best machine

Coin changer tube refills

Tube nominal	Count to fill	Refillable value
0.05	2	0.10
0.10	6	0.60
0.20	6	1.20
0.50	21	10.50

Cash collection

Planned value	Cash collected	Completed
227.75	0.00	13.05.2024 14:32

Clicking on the “Cash by machine” button allows editing the refillable values.

Encashment task is resolved when the encashment button is pressed in the app, web or on the vBox.

Tube refill tasks are resolved once information from the audit is received. Progress can be tracked in the Summary section.

Maintenance

The maintenance tab lists all events that have been filtered out according to the applied filters and triggers. Tasks are resolved once the correct event code is received or they can be resolved manually by clicking on the three dots and choosing “Resolve event”.

It is also possible to add a note to notify the manager that the problem has been checked. To add a note, click on three dots and choose “ + Add note”. Notes can also be edited.

The screenshot shows the 'Tasks' tab for machine '1. FSV Mainz 1040'. At the top, there are tabs for 'Summary', 'Cash control', 'Maintenance', and 'Tasks'. Below the tabs is a 'Delete' button. The machine name '1. FSV Mainz 1040' and its location '1. FSV Mainz 05' are displayed. A table lists tasks with columns for 'Event', 'Status', 'Resolved at', and 'Note'. One task is listed: 'Thermostat' with a status of 'Resolved', resolved at '03.06.2024 08:10', and a note 'Thermostat needs to be replaced.'.

Event	Status	Resolved at	Note
Thermostat FOOD, SNACK, OR CAN/BOTTLE SYSTEM: The Thermostat is defective.	Resolved	03.06.2024 08:10	Thermostat needs to be replaced.

Tasks

The Tasks tab is used to add extra tasks to the machines in the route. To add tasks to a route, click on “+ New task”.

If you have selected the type “Task list” in the planning section and added specific tasks or lists, they will automatically appear here. You can also edit and delete these tasks, or add more items.

To add a task, start typing the task in the text field. If a task has already been used, it will appear in the dropdown, and you can select it to add it. If you want to create a new task, type it in the text field and press “Enter”.

The dropdown will display both tasks and task lists. If you select a list, all tasks that belong to the list will be automatically added. To learn more about Task creation, please use the Tasks/Lists user guide.

The screenshot shows the 'Tasks' tab for machine 'Best Machine' at 'Location 123'. At the top, there are tabs for 'Summary', 'Stock', and 'Tasks'. Below the tabs are 'Delete', '+ New task', and 'Complete' buttons. A table lists tasks with columns for 'Task', 'Status', and 'Completed'. One task is listed: 'Spring window cleaning'.

Task	Status	Completed
Spring window cleaning		



Any questions?

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In case there are multiple employees performing tasks at a single machine, clicking on the "Employee" column (ex. 2 pers.). This will open details with a list of employees and tasks they are responsible for.

Task types and detail panels

Each task type has a separate details panel to view more information on stock levels, cash details and maintenance issues.

Stock

In the main machine table, stock details are marked by the progress bar and percentage, it reflects the remaining stock in the machine.

Clicking on the refill percentage will open a popup with a stock details panel.

If a machine uses shared stock and is part of a warehouse, it will have a warehouse icon next to the name of the warehouse.

Cash - Tube levels and encashment

The tube column shows the number of coins in the tube. The encashment column shows how much money is in the cashbox. These values will be visible if a cash control filter is used. Selecting these machines will create a coin changer refill task or/and an encashment task. If tube refill values are not set up, the tube column will be empty

Clicking on the numbers will open a popup with detailed info.

<input type="checkbox"/>	Machine	Employee	Refill	Tubes	Encashment	Tasks	Maintenance	Last visit
<input type="checkbox"/>	Test machine	Fabio Baten		€58.80	€104.45			07.05.2024 13:04
<input type="checkbox"/>	Best machine	Janis Berzins		€96.15	€175.50			06.05.2024 14:02

Tubes ✕

Nominal	Remaining	Value	To fill	Refillable value
EUR 0.05	81 / 80	EUR 4.05	0	EUR 0.00
EUR 0.10	70 / 60	EUR 7.00	0	EUR 0.00
EUR 0.20	17 / 60	EUR 3.40	43	EUR 8.60
EUR 0.50	54 / 60	EUR 27.00	6	EUR 3.00
EUR 1.00	57 / 60	EUR 57.00	3	EUR 3.00
EUR 2.00	0 / 0	EUR 0.00	0	EUR 0.00
Total refillable value				EUR 14.60

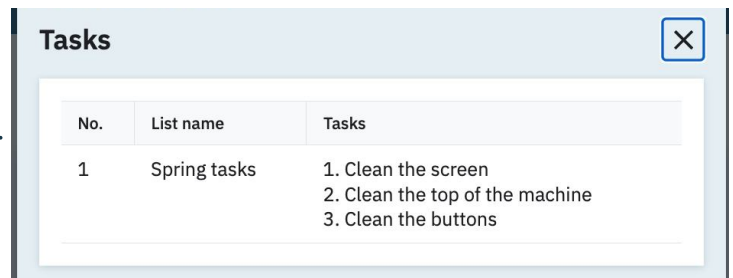
Encashment ✕

Module	Value to collect
Cashbox	EUR 104.45
Total value to collect	EUR 104.45

Tasks

The tasks column shows the name of the tasks or lists that were selected in the tasks filter. If multiple tasks or lists are selected then it will indicate how many tasks/ lists have been selected. To setup a task or list of tasks, visit Planning → Tasks/ Lists.

Clicking on the numbers will open a popup with detailed info.

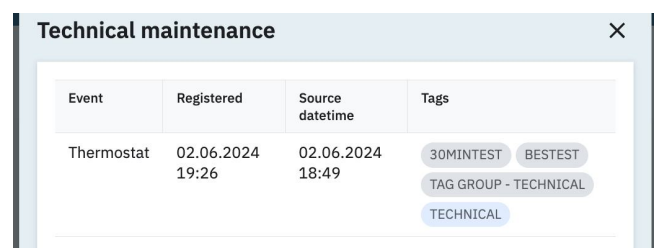


No.	List name	Tasks
1	Spring tasks	1. Clean the screen 2. Clean the top of the machine 3. Clean the buttons

Maintenance

Required - in the Maintenance column means that there are unresolved events, and a maintenance task can be created. If the maintenance filter is used and nothing is displayed in the maintenance column that means there are no unresolved events, and a maintenance task cannot be created.

Clicking on the “Required” and it will open a list of all unresolved events.



Event	Registered	Source datetime	Tags
Thermostat	02.06.2024 19:26	02.06.2024 18:49	30MINTEST BESTEST TAG GROUP - TECHNICAL TECHNICAL

Route list preview

To preview the route list that you will be creating and make adjustments you can press on “v” arrow or on “Route list preview”. Opening the Route list Preview tab will show the information of all employees on the left side and list of locations, machines and tasks on the right side.

In case of changes, it is possible to assign machines to different employees by using the “Reassign” function. Tasks can be deleted by clicking on the “X” icon. An assignee with all their tasks can be deleted by clicking the “Remove” button.

In case there are tasks that have not been mapped to specific employees, they will appear in the Assignee column as “Unassigned”. They must be either removed or assigned to employees before a route task list can be generated.

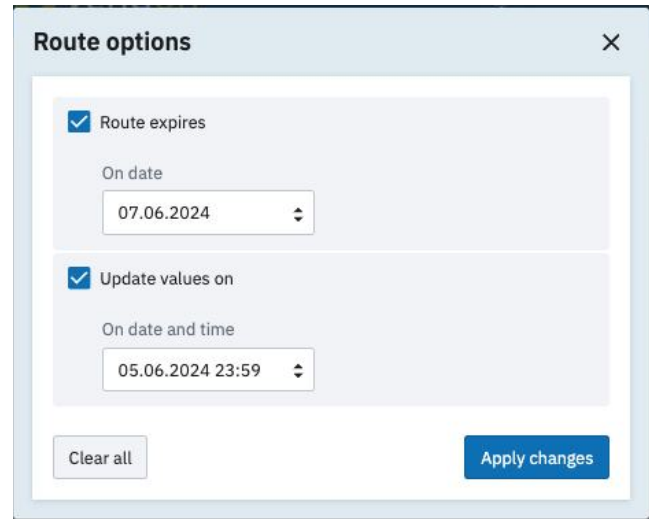
Options

Route expires - go to Options on the bottom of the page and specify the route expiry date (check-mark the box to set the expiry date or leave the box unchecked if it is not necessary to set the expiry date).

If the expiry date is set, once it is reached, the route will no longer be available for fulfilment.

Update values on - you can also choose the "Update values on" option. This will come in handy if you want fresh values when it is time to do the actual picking - so that there is a smaller difference between the products picked and the products missing in the machine.

Mark the checkbox, select the date and time, and the picklist will be updated with the latest values on the specified date and time.



Route options [X]

Route expires

On date
07.06.2024

Update values on

On date and time
05.06.2024 23:59

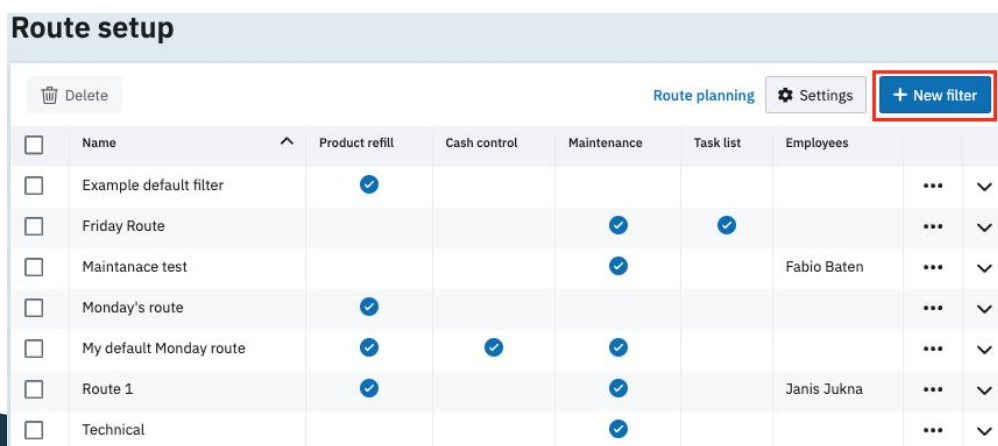
Clear all [Apply changes]

Route setup

The route setup section allows users to define custom filters to facilitate the planning process. Instead of selecting all parameters one by one, a filter with the required conditions can be used, which results in a list of machines that meet the defined parameters and can be further placed in routes. Moreover, any user can set their own default filter to apply automatically in the planning process.

New filter creation

To create a new filter, click on the "+ New filter" button and start with the name of the filter. Then, specify which route tasks should be included in the route. Several task types can be included in a single route: Product refill, Encashment, Tube check, Task list, Technical maintenance.



Route setup

Delete [Route planning] [Settings] **+ New filter**

<input type="checkbox"/>	Name	Product refill	Cash control	Maintenance	Task list	Employees		
<input type="checkbox"/>	Example default filter	<input checked="" type="checkbox"/>					...	▼
<input type="checkbox"/>	Friday Route			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		...	▼
<input type="checkbox"/>	Maintanace test			<input checked="" type="checkbox"/>		Fabio Baten	...	▼
<input type="checkbox"/>	Monday's route	<input checked="" type="checkbox"/>					...	▼
<input type="checkbox"/>	My default Monday route	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			...	▼
<input type="checkbox"/>	Route 1	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		Janis Jukna	...	▼
<input type="checkbox"/>	Technical			<input checked="" type="checkbox"/>			...	▼

Default filter setup

Go to “Settings” and change the default filter from a list of predefined filters for the Route planning section. This will allow you to immediately filter out machines that require certain service when opening a Route planning section. Press “Save” and the new default filter will be enabled.

Task types

Selecting “Product refill” without any additional triggers will provide a list of all machines and warehouses that allow any manipulations with their stock.

Selecting “Cash control” (Encashment or Tube check) without any additional triggers will provide a list of all machines that have a coin changer set up in the device settings.

Selecting “Technical maintenance” without any additional triggers will provide a list of all machines that have at least one active event that has not been resolved for more than 3 days.

Selecting “Task list” it is mandatory to add a specific task or to be able to save the filter. The respective task/task list will be added to all available machines or those that match the applied filters.

Task triggers

Based on your choice of route tasks, you can select additional triggers which work to narrow down the list of machines.

NB! Task types are combinable, meaning that several task types can be included in a single route. Selecting several task types will not select only those machines for which all tasks are applicable, but machines will be sorted on an and/or basis (at least one applicable task).

Product refill triggers

- Total stock - This trigger allows to filter out all machines that have reached a certain stock level percentage. For example if set 30% it will filter all machines that have a total stock level of 30% or lower.
- Expiration date - Machines with products approaching the expiration date can be filtered out. The system will look for machines with products expiring up to the number of specified days (for 3 days, the expiration date within 0, 1, 2, 3 days will be selected), and will also include machines with already expired products. Note: Expiration dates can be set in the Stock tab of the machine account.
- Empty facings - This trigger allows you to select machines where a specific number of products have been sold out.
- Critical product - Machines with any products or components marked as "Critical" will be included in the route if the critical product reaches the specified critical level. Note: Products and components can be marked as critical in device accounts under "Settings".

Triggers

Total stock	↕	70	%
Days till expiry	↕	3	📅
Empty facings	↕	1	📦
Product is critical for machine	↕		🗑️

Cash control triggers

- Cash level above - "Cash level above" trigger may be used to specify the threshold of money in the bill stacker and cash box available for encashment.
- Critical tube levels - "Critical tube level" – applicable to accounts where the coin changer's critical tube levels have been specified.

Route tasks

Select the tasks you want completed at the machine. Then, use further triggers to limit machine selection.

<input type="radio"/> Product refill	<input checked="" type="checkbox"/> Encashment	<input checked="" type="checkbox"/> Tube check
<input type="radio"/> Task list	<input type="checkbox"/> Technical maintenance	

Triggers

Cash level above	↕	50	🔍	🗑️
If tube level is critical	↕			🗑️

Technical maintenance triggers

- Event tags - it is possible to specify which active events should be filtered out. This is done by using event groups (tags) and event duration.
- Days unresolved - will filter out machines that have unresolved events for a specified number of days.

Task or list triggers

When the task type "task list" has been selected, you must select a task or a task list from the "tasks" dropdown. This dropdown lists all tasks/lists that have been set up on your account. If there are none, proceed to Planning → Task/Lists and set them up there.

Additional filters

- Location calendar - any task types can be filtered according to the location calendar – depending on when the location is closed for a longer time period, it can be excluded from route planning. Location holidays can be specified under Settings → Locations. Mark the locations you want to set holidays for, and press “Manage holidays”; then input the holiday period.
- Show available machines - show only those machines that can be placed in a route - machines that are not in another active route and have a location mapped.
- Enable strict match - enable limiting filters that make sure all machines match all triggers.

Route list

Route list focuses on managing and reviewing the lists of planned routes. You’ll learn how to sort and filter route lists, download picklists, check route summaries, manage stock levels and more.

Go to: Planning → Route list. This will open the list of routes and provide information on the employee, number of machines/warehouses in the route, status, route progress and also download the picklist or pre-kitting list (warehouse pack list). If you need to assign one or more tasks to another employee due to their absence, use the “Change employees” function above the table.

<input type="checkbox"/>	Date	Employee	Status	Tasks	Machines	Warehouses	Expires	Picklist
<input type="checkbox"/>	03.06.2024 10:56	Berzins Janis	Ready	0/2	2			Download
<input type="checkbox"/>	03.06.2024 10:46	John Snow	Completed	1/1	1			Download
<input type="checkbox"/>	03.06.2024 10:44	Arnolds Švarcnēgers	In progress	2/6	2	1		Download

Summary

Check the details of a specific route by clicking on the arrow pointing downward. This will open a route summary with a list of machines/warehouses in the route. Here you can rearrange the order for the machines using the drag and drop function and delete unnecessary tasks or machines from the route if it has not been started. Check on the progress of the route on the Task progress bar. If the route has an update scheduled, you can also cancel the previous update and execute it now. Just press the “Update now” button, and you will have fresh values in 10 minutes’ time.

When a machine is serviced – i.e., the task type assigned has been completed – a green “Completed” sign will appear, along with the date and time.

Summary			
Cash control			
Maintenance			
Tasks			
Delete			
Collapse all			
Berlin Tegel Airport			
Schwarzer Weg, Saatwinkel, Tegel, Reinickendorf, Berlin, 13507, Germany			
Machine	Task	Status	Visit time
Airport Berlin	Cash control	Informative	
1. FSV Mainz 05			
Athener Allee, Hechtsheim, Mainz, Rhineland-Palatinate, 55129, Germany			
Machine	Task	Status	Visit time
1. FSV Mainz 1040	Cash control	Informative	03.06.2024 08:09

Stock

The stock report lists the planned stock per product for all machines in the route. “Total refill “ shows the total amount of stock needed to refill all machines in the route. By clicking on the “Picklist by machine” button, you can view stock by machine and change the amount to be refilled for each product and change the refill template if necessary.

Refill tasks are resolved when the refill button is clicked either in the app, on the web, or on the vBox itself. Progress can be tracked in the Summary tab.

Picklist settings

You can customise the PDF format of the picklist and pre-kitting list under Settings above the table:

- How the products must be sorted in the picklist and pre-kitting list.
- Display density - padding between text
- Font size.
- Content - by choosing columns you want to see and hide.

Picklist settings ×

General settings

Select the padding between cells, font size, and the way you want items sorted. If you have many products in one machine, smaller padding and font size will help fit items on one page.

Display density *	Font size *
Medium	Medium
Sort picklist by *	Sort pre-kitting list by *
Selection	Warehouse location

Pre-kitting list content ∨

Picklist content ∨

Save Close

Cash control

The cash control tab lists coin changer refill and encashment tasks.

Total cash - provides values for all machines.

Cash by machine - Provides values per machine.

Machine		
Best machine		
Coin changer tube refills		
Tube nominal	Count to fill	Refillable value
0.05	2	0.10
0.10	6	0.60
0.20	6	1.20
0.50	21	10.50
Cash collection		
Planned value	Cash collected	Completed
227.75	0.00	13.05.2024 14:32

Clicking on the “Cash by machine” button allows editing the refillable values.

Encashment task is resolved when the encashment button is pressed in the app, web or on the vBox.

Tube refill tasks are resolved once information from the audit is received. Progress can be tracked in the Summary section.

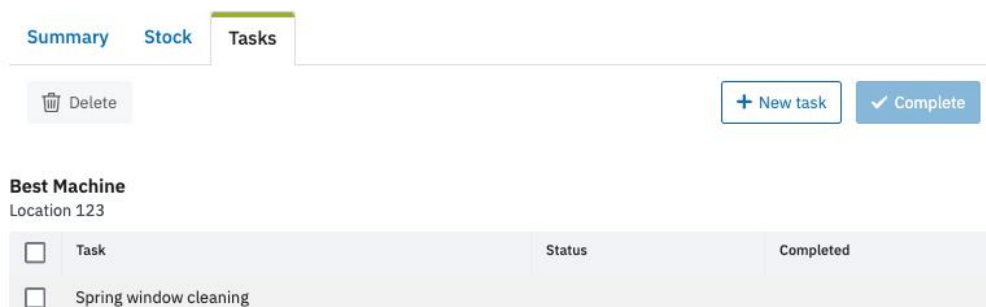
Tasks

The Tasks tab is used to add extra tasks to the machines in the route. To add tasks to a route, click on “+ New task”.

If you have selected the type “Task list” in the planning section and added specific tasks or lists, they will automatically appear here. You can also edit and delete these tasks, or add more items.

To add a task, start typing the task in the text field. If a task has already been used, it will appear in the dropdown, and you can select it to add it. If you want to create a new task, type it in the text field and press “Enter”.

The dropdown will display both tasks and task lists. If you select a list, all tasks that belong to the list will be automatically added. To learn more about Task creation, please use the Tasks/Lists user guide.



Summary Stock **Tasks**

Delete + New task Complete

Best Machine
Location 123

<input type="checkbox"/>	Task	Status	Completed
<input type="checkbox"/>	Spring window cleaning		