ROUTE PLANNER – USER MANUAL

V.2.1.

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1. General Information

The route planning tool by Vendon has been created to aid coffee and vending machine operators in servicing their machine fleet. It has been designed as a solution to improve and facilitate the machine servicing process both from the managerial side, as well as from the side of the servicing staff.

This includes **a flexible refill route setup** by allowing to filter machines that have reached the **stock level specified by the user**, the option to set **expiry dates** for products in the machine not to keep expired items in the machine, as well as mark **items that are critical for sales** so that the machine is placed in the route if this specific product reaches the critical stock level. Plus, users can also filter out machines with a **specific number of empty products** in them.

This version of the route planner includes **cash control** as well. This means that the critical level for each tube can be defined, **tube refill tasks** can be created, as well as **encashment** planned.

To extend machine lifetime, **event-based technical maintenance** is also included. Machines with unresolved events can be filtered out so that technicians can visit these machines and take care of the problem in a timely manner.
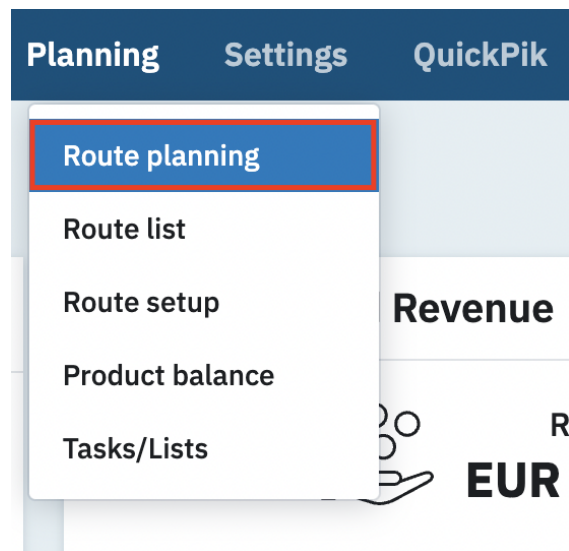
Task lists, which are part of the route planning tool, allow operators to set extra tasks that must be completed at the machine, or create maintenance routes.

Machines can also be filtered by machine type (snack, coffee, etc.), machine tags, locations and clients, as well as employees.
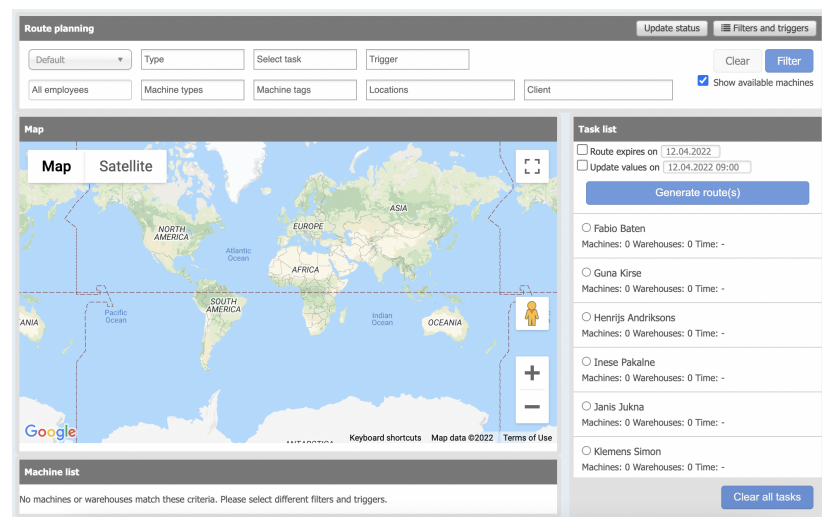
This manual provides **step by step instructions** on how to use the tool – from creating custom filters, to assigning tasks, to completing them. In order to start using the route planning tool, contact your account administrator and request access to it.
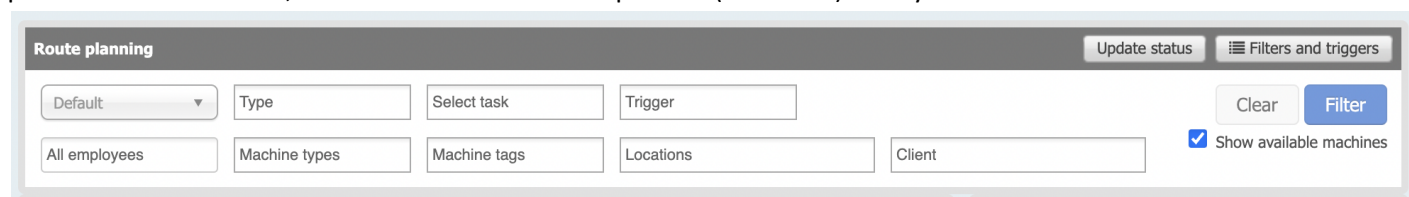
2. Route Setup

Go to Planning → Route planning	This will open the main route planning page.

To set up a route, use the section "Route planning". You can either set up a route from scratch or use an already predefined set of filters, available from the first drop-down ("Default") if they have been saved.

To set up your own filter combinations, click the "Filters and triggers" button located on the far right, or proceed to Planning → Route setup. Each filter and trigger is explained in section 2.1.1.

2.1. Filters and triggers
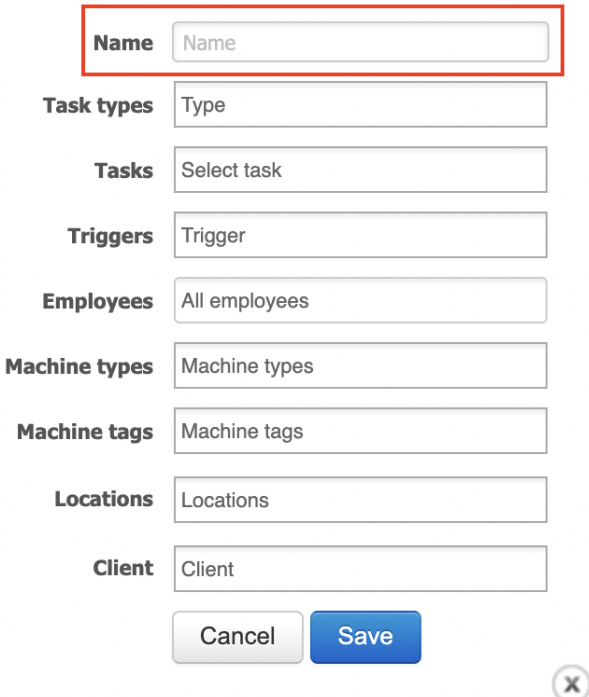
Tutorial: **https://www.youtube.com/watch?v=rvHPLYZwrEg**

This section lists all predefined filters and triggers that have been set up. To create a new template, click on "+ New filter". To return to the main page, click on "Route planner".
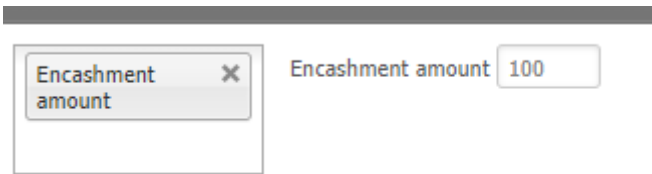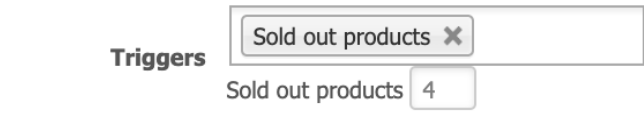
2.1.1. Setting up filters and triggers

1. Enter the name of the filter (this name will appear in the main section, in the filter dropdown list).

Name	Name
Task types	Type
Tasks	Select task
Triggers	Trigger
Employees	All employees
Machine types	Machine types
Machine tags	Machine tags
Locations	Locations
Client	Client

Cancel   Save

---

2. Specify which task types should be included in the route.

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

Cash control

Technical maintenance

Task list

2.1. Selecting "**product refill**" without any additional triggers will provide a list of all machines and warehouses that allow any manipulations with their stock.

2.2. Selecting "**cash control**" without any additional triggers will provide a list of all machines that have a coin changer set up in the device settings.

2.3. Selecting "**technical maintenance**" without any additional triggers will provide a list of all machines that have at least one unresolved event registered.

2.4. On selecting **"task list"**, adding a specific task or list will be mandatory to save the filter. The respective task/task list will be added to all available machines or those that match the applied filters.

2.4.1. 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.	Task types: Task list ✕ Tasks Triggers — Lists Employees — **Coffee machine visit** Machine types — Spring clean — Summer break tasks — Winter break list Machine tags — Tasks Locations — Add new products — Add sticker XY Client — Check FW
3. Select an employee (not mandatory). Only the machines assigned to this employee will be included in the list. **NB!** If multiple employees are assigned to a single machine (for instance, one is a refiller, the other – a technician) and both task types have been selected, the list will only reflect the tasks available to the selected employee.	**Anita Petrova** Fabio Baten Guna Kirse Klemens Simon Leo Hoffman Monika Sabat
4. Choose the trigger which will help to filter out only the machines needing attention. **NB!** Triggers work on an and/or basis. Selecting two triggers will filter out machines corresponding to AT LEAST one trigger.	Triggers Employees — **Critical products** — Expiration date Machine types — Event tags — Total stock Machine tags — Location calendar Locations — Critical tube levels — Encashment amount Client — Sold out products
4.1. Critical products Machines with any products or components marked as "Critical" will be included in the route if the critical product reaches the specified critical level. Task type for this option is "product refill".	Products and components can be marked as critical in separate device accounts, under "Settings".

Product setup

Product *

Coca Cola can 330ml

☑ Critical product

Max value *	Critical value *	Refill value *
20	2	20

Min. picklist value *	Refill unit size *
1	1

4.2. Expiration date

When refilling a machine, it is possible to specify product expiry dates. 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.

Task type for this option is "product refill".

Triggers

Expiration date ✖

Expires in [3] day(s)

4.2.2. Setting the expiration date

Expiration dates can be set in the Stock tab of the machine account. Click the "Expiry dates" button and input the dates for the products you wish to track.

Remaining	Quantity	Refill	Critical value	Max value	Last activity	Expiry date
80%	16	20	15	20	10.08.2021 14:13	08.07.2021
60%	12	20	2	20	06.08.2021 19:09	
50%	5	10	2	10	09.08.2021 23:02	10.07.2021
50%	5	10	2	10	07.08.2021 23:01	
55%	11	20	2	20	09.08.2021 23:02	

4.3. Event groups

If the task type "technical maintenance" is chosen, it is possible to specify which active events should be filtered out. This is done by using event groups (tags) and event duration.

Event groups ✖   Events active less than [1] days

Event groups   Event groups

4.4. Total stock

When choosing the task type "product refill", it is also possible to filter out all machines that have reached a certain stock level percentage.

Total stock ✖   Stock level [100] %

4.5. 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 the 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.

Locations

🗑 Delete (2)   📅 Manage holidays (2)   👥 Change employees (2)

	Name ^	Address	Working hours	Type
☑	1. FC Hersbruck	Happurger Straße, Hersbruck, Nürnberger Land, Middle Franconia, Free State of Bavaria, 91217, Germany	00:00 - 23:58	Minimarket
☑	1. FSV Mainz 05	Athener Allee, Hechtsheim, Mainz, Rhineland-Palatinate, 55129, Germany	00:00 - 23:59	Other
☐	10 km	Ritvari, Rumbula, Stopiņu novads, LV-2121, Latvia	09:00 - 18:00	Other

4.6. Critical tube levels
If the task "cash control" is selected, the appropriate trigger that can be used is "Critical cash level" – applicable to accounts where the coin changer's critical tube levels have been specified.

Coin changer tube refill information can be filled in the specific machine's account under Settings -> Peripherals:

Coin changer tube configuration

Tube No.	Coin nominal	Critical value	Refill value	Max. value	Alert
1	0.05	2	20	30	☑
2	0.10	2	20	20	☑
3	0.20	2	20	40	☐
4	0.50	4	50	80	☐

4.7. Encashment amount
If the task "cash control" is selected, "Encashment amount" trigger may be used to specify the threshold of money in the bill stacker and cashbox available for encashment.

Encashment amount ✕

Encashment amount 100

4.8. Sold out products
This trigger allows you to select machines where a specific number of products have been sold out. Choose the route type "Product refill" to enable this trigger.

Triggers   Sold out products ✕

Sold out products 4

5. Select machine types (coffee, snack, cold drink) to be included, machine tags, clients and locations (not mandatory). This will come in handy for a fixed route creation.

Once all the values have been selected, click on "Save". Your custom filter will appear in the list and will be available in the drop-down. To return to the route creation page, click the "Route planner" button.
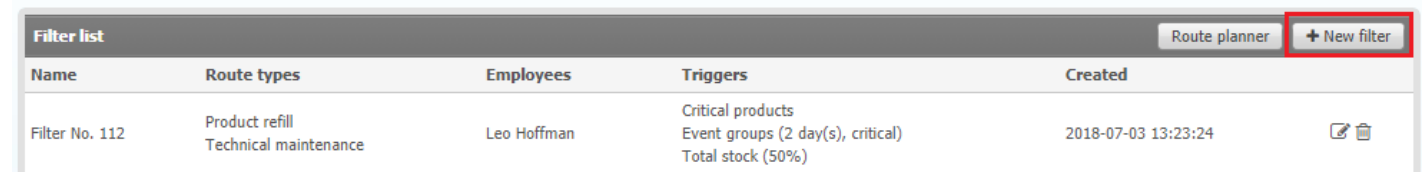
3. Fixed Routes

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**. This gives users greater flexibility, as machines can be removed from or added to the fixed route to make the trips more efficient.

3.1. Fixed route setup

In order to create a fixed route, navigate to "Route Setup" and click on "New Filter" (more explanation is given in Section 2.1.).

Filter list				Route planner	+ New filter
Name	**Route types**	**Employees**	**Triggers**	**Created**	
Filter No. 112	Product refill Technical maintenance	Leo Hoffman	Critical products Event groups (2 day(s), critical) Total stock (50%)	2018-07-03 13:23:24	✎ 🗑

Use the available filters and triggers to create your own fixed route. First, give a name to your setup and select the route type(s) and apply triggers if you wish.

3.1.1. Select the machine types you wish to include in your route.

3.1.2. 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.
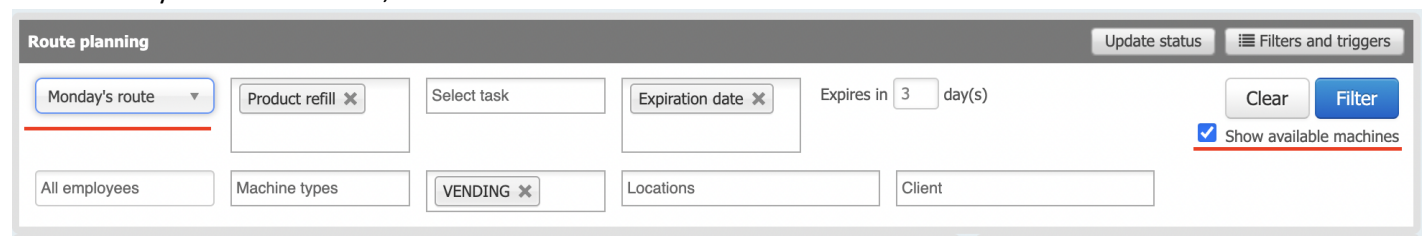
NOTE: Machines must also have locations assigned to them; otherwise, the machine cannot be placed in a route.

3.1.2. Select Locations and Clients you wish to include in the route. Then press "Save" to save this setup.

NB: Please note that 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. You **WILL NOT r**eceive a list of all machines belonging to this client + machines in the specific location.

3.2. Fixed route creation

Navigate to "Route planning" and select your route. The checkbox "Show available machines" is enabled by default so you will only get machines which can be placed in a route. If you want to see machines without a location set up or those already in an active route, unmark this checkbox.

Route planning				Update status	Filters and triggers
Monday's route ▼	Product refill ✕	Select task	Expiration date ✕	Expires in 3 day(s)	Clear / Filter ☑ Show available machines
All employees	Machine types	VENDING ✕	Locations	Client	

You will see a list of all machines that correspond to the selected filters and triggers. Either use the checkbox "Select all" or add the machines one by one.

Machine list				
Machine name	**Employee**	**Stock**	**Cash**	**Maintenance**
☐ select all				
☐ 🖥 Allianz Arena	Klemens Simon	94%	⚪	⚪
☐ 🖥 Bahnhof Schwarz	Fabio Baten	92%	⚪	⚪
☐ 🖥 Berlin Tegel Airport	Fabio Baten	100%	⚪	⚪
☐ 🖥 Borussia Park	Otto Scherrer	95%	⚪	⚪

The machines you have selected will appear in the task list. If you are happy with the route(s), hit "Generate route(s)".

If you'd like to add more machines to this list, just use different filters to get a new list of machines. The task list will be preserved.
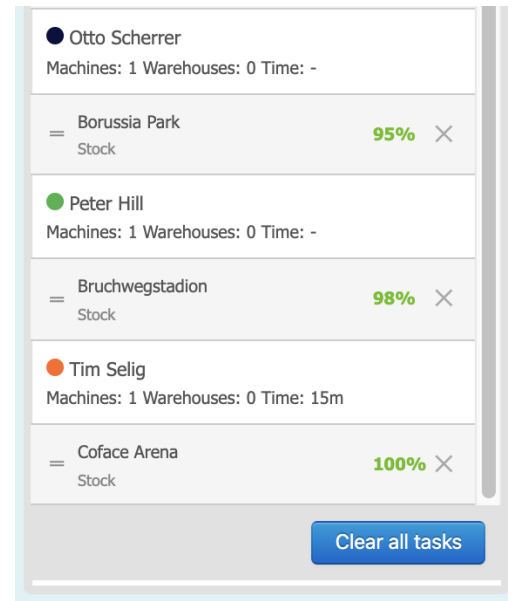
Task list
☐ Route expires on [22.01.2020]
Generate route(s)

🔵 Fabio Baten
Machines: 3 Warehouses: 0 Time: -

Bahnhof Schwarz Stock	92% ✕
Berlin Tegel Airport Stock	100% ✕
BPE 2 Stock	95% ✕

🟢 Leo Hoffman
Machines: 2 Warehouses: 0 Time: 15m

Coface Arena Stock	100% ✕
Bruchwegstadion Stock	98% ✕

If you would like to begin the route creation from scratch, just click on "Clear all tasks".

More information about working with the Machine list and Task list is available in Section 4 of this document.
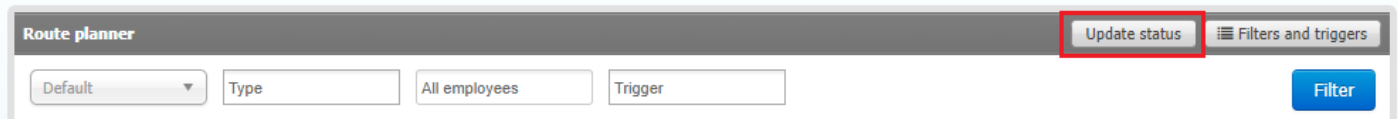
4. Route Creation

4.1. Status update

Tutorial: **https://www.youtube.com/watch?v=QJg7PcQWHdU**

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.	
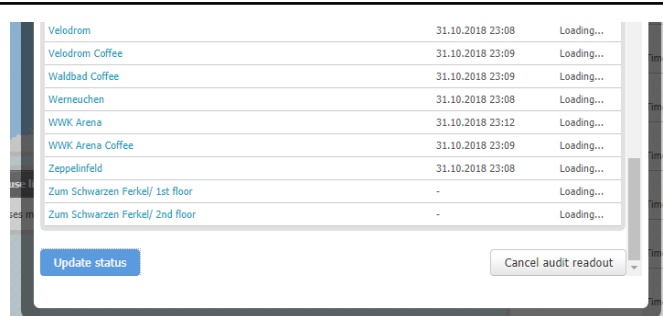
4.2. Device / Warehouse list

Once all the filters are in place, click on "Filter" to pick out the machines.
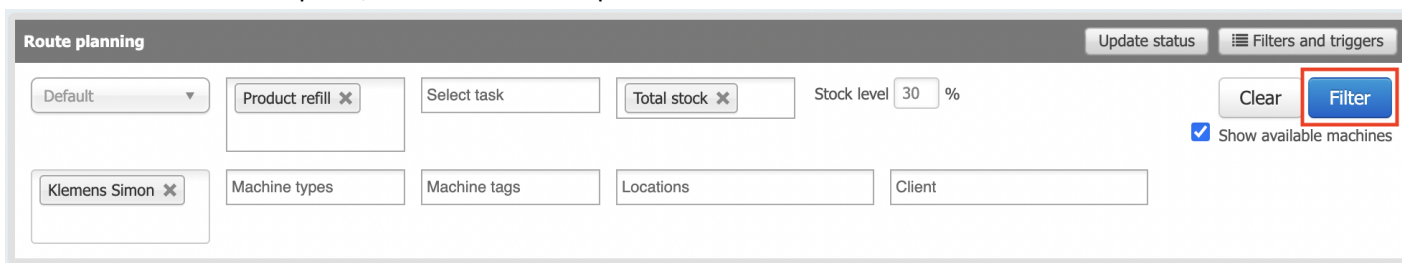
If you want to use a different set of filters, press "Clear" to clear away all selected values.

Scrolling below the map, 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.

Machine list

Machine name	Employee	Stock ↑	Cash	Maintenance
☐ select all				
☐ Altstadt Hotel Potsdam 2	Fabio Baten	0%	○	○
☐ Hamburg Office	Leo Hoffman	0%	○	○
☐ Hamburg Office Lobby	Leo Hoffman	0%	○	○
☐ Landgasthof Diedersdorf/ Cafe	Fabio Baten	0%	○	○
☐ Landgasthof Diedersdorf/ House 1	Fabio Baten	0%	○	○
☐ Landgasthof Diedersdorf/ House 2	Fabio Baten	0%	○	○
☐ Marmaris Restaurant	Fabio Baten	0%	○	○

Note that a machine or warehouse must be assigned to a location in order for the checkbox to be enabled. If the device is not assigned to any location, it won't be possible to include it in the route.

☐ Caffe Newport		● 0	○	○	✕	⌄
device not assigned to location						
☐ Coface Arena	Leo Hoffman		○	○	✕	⌄

Only machines that are not currently in any active routes 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.

☐ BPE Coffee	Fabio Baten	○	○	✕	⌄
device in active route					
☐ Burg Feuerstein Airport	Tim Selig	○	○	✕	⌄

If a single employee performs all tasks at a single machine, clicking on the downward pointing arrow will open the list of all tasks for the employee. This allows the user to select specific tasks for the employee. If the checkbox to the left of the machine name is checked, all available tasks will be placed in the route task list.

☐ Burg Feuerstein Airport	Tim Selig	91%	✕	✕	⌃
☐ Tim Selig		91%	○	○	
☐ Tim Selig			✕	○	
☐ Tim Selig			○	✕	

In case there are multiple employees performing tasks at a single machine, clicking on the downward pointing arrow on the right will open the list of employees and their tasks.
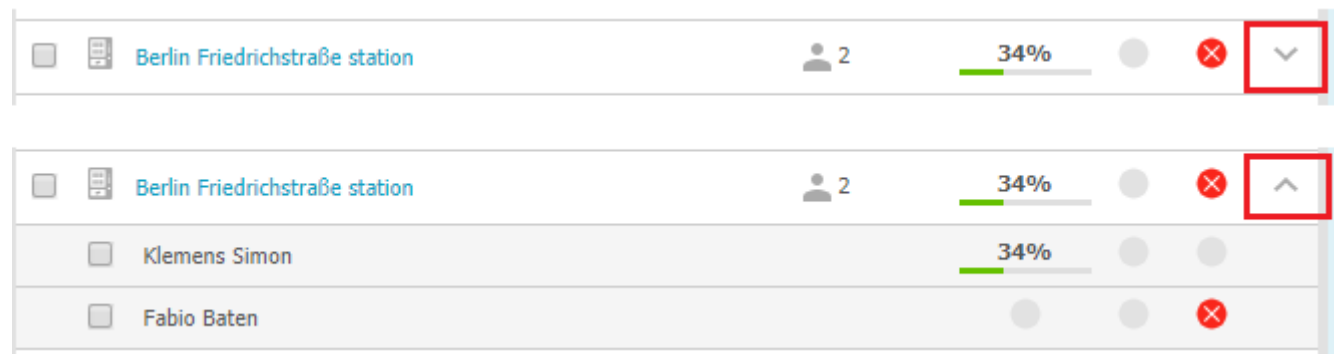
4.2.1. Icons

STOCK

Marked by the progress bar and percentage, it reflects the remaining stock in the machine.

| Clicking on the percentage will open a popup with stock info. | |
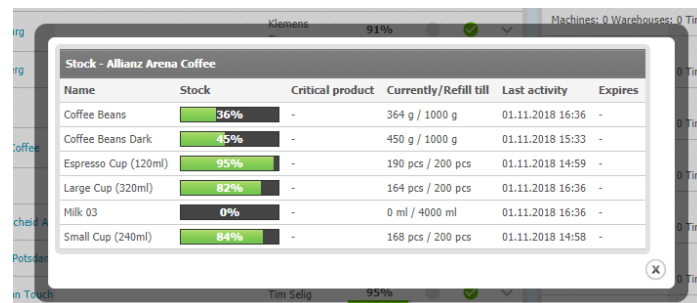
If a machine uses shared stock (is part of a warehouse), the icon will be a grey circle, and it won't be possible to create a refill task for this machine (a refill task can be created for the warehouse the machine is a part of).
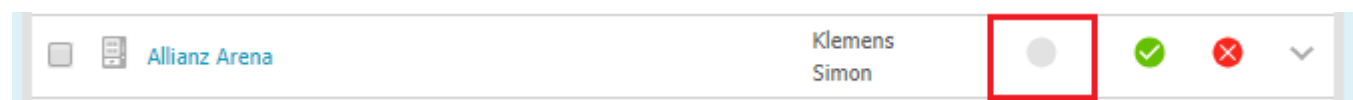
CASH

Marked by a red/green/grey icon.

A red icon means that at least one tube has reached the critical number of coins. Selecting this machine will create a CC refill task and an encashment task.

Clicking on the icon will open a popup with cash info:

Tube	Nominal	Coins per tube	Value in tube	Refillable value	Refillable coins	Critical value	Refill coins	Max coins
1	0.05 USD	16/40	0.80 USD	1.20 USD	24	20	40	40
2	0.10 USD	24/40	2.40 USD	1.60 USD	16	20	40	40
3	0.20 USD	23/40	4.60 USD	3.40 USD	17	20	40	40
4	0.50 USD	24/40	12.00 USD	8.00 USD	16	20	40	40
Total refillable value	14.20 USD							
Cash box	0.00 USD							
Bill stacker	0.00 USD							

Cash in machine - 1. FC Hersbruck

A green icon means that there is a coin changer set up, and the system is able to provide information about the current values, but tube levels are not critical. If tube refill values are not set up, only an encashment task will be created.

1. FSV Mainz 05   Otto Scherrer

A grey icon means that there is no coin changer, and no tasks can be created.

Airport Augsburg   Klemens Simon   91%

TECHNICAL MAINTENANCE

A green icon means that there are no unresolved events, and a maintenance task cannot be created.

1. FC Hersbruck   2   99%

A red icon means that there are unresolved events, and a maintenance task can be created.

Allianz Arena   Klemens Simon
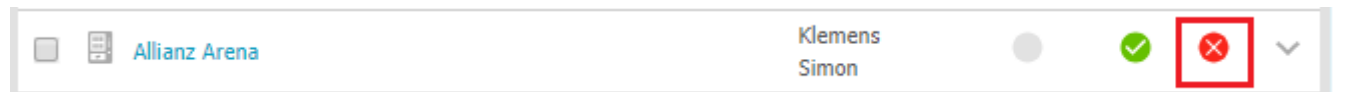
Clicking on the red icon will open a list of all unresolved events.

Events - Alte Försterei

Event	Registred at	Source datetime	Tags
Refrigeration FOOD, SNACK, OR CAN/BOTTLE SYSTEM: The cooling unit does not cool down to the pre-set temperature or the unit has frozen up.	01.11.2018 14:38	01.11.2018 14:16	TECHNICAL

A grey icon means that no events are being registered (refers to warehouses). Maintenance tasks cannot be created.

If machines that are tied to a warehouse have any unresolved events, they will be listed with the machine name.

4.3. Map

All check-marked machines for which the location has been set will be visibly marked in the map. Each employee gets assigned a colour.
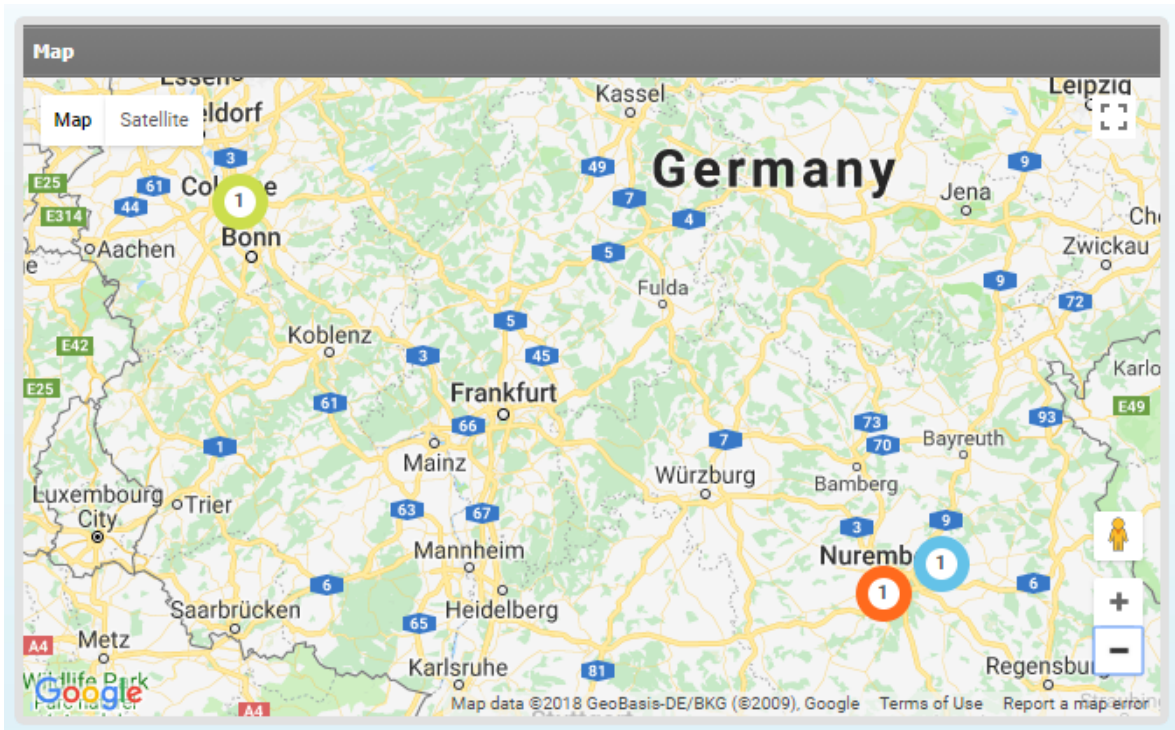
Clicking on the icon opens the status popup that lists all tasks and employees at this machine.

4.4. Task list

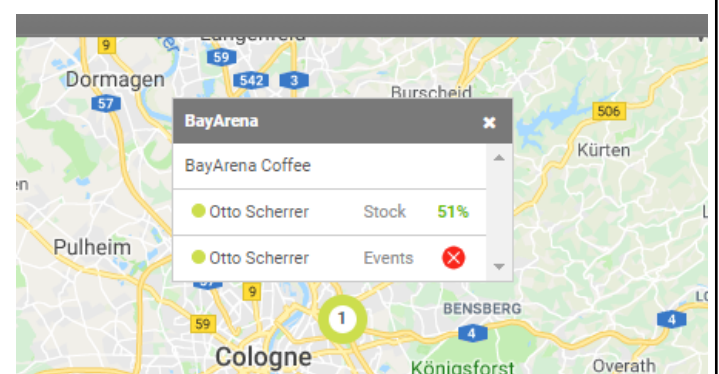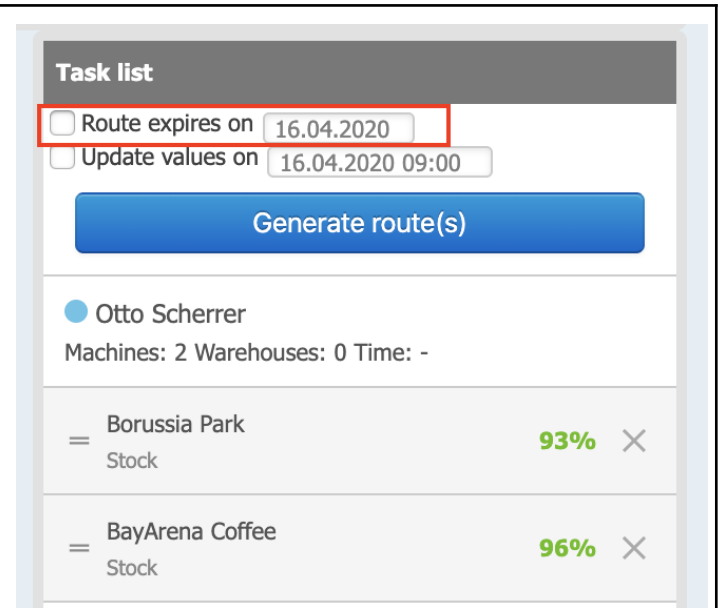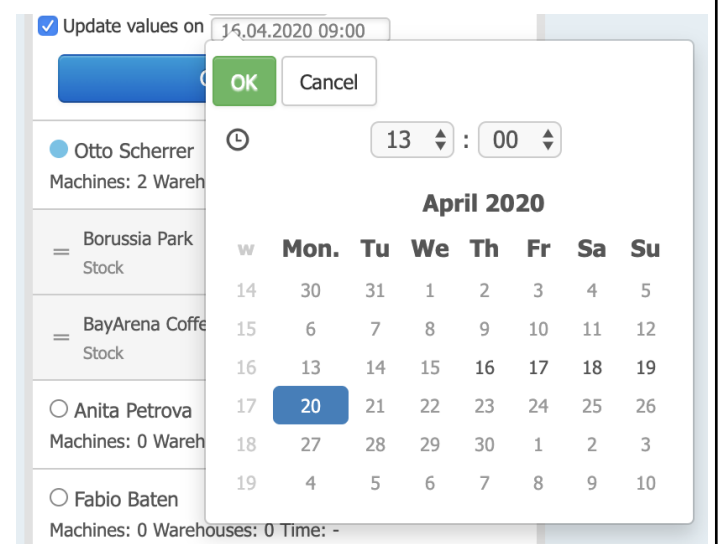|	
Go to the "Task list" on the right-hand side of the page and specify the route expiry date (check-mark the box to set the expiry date or leave the box unchecked if it is not necessary to set the expiry date).If the expiry date is set, once it is reached, the route will no longer be available for fulfilment.	
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. The update can be scheduled five days ahead of the route creation date.	
If necessary, it is possible to assign machines to other employees by using the drag and drop function.	
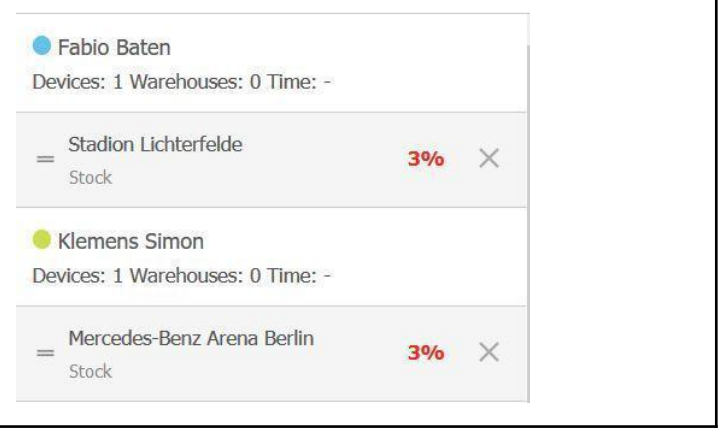
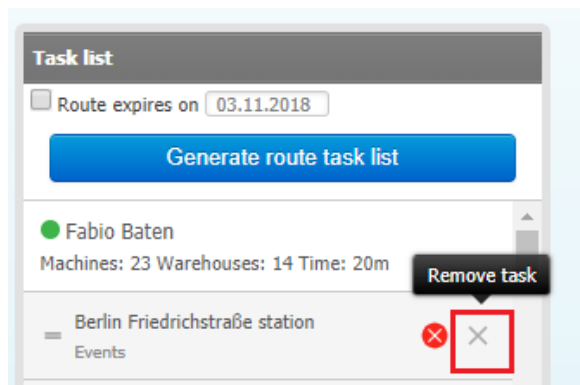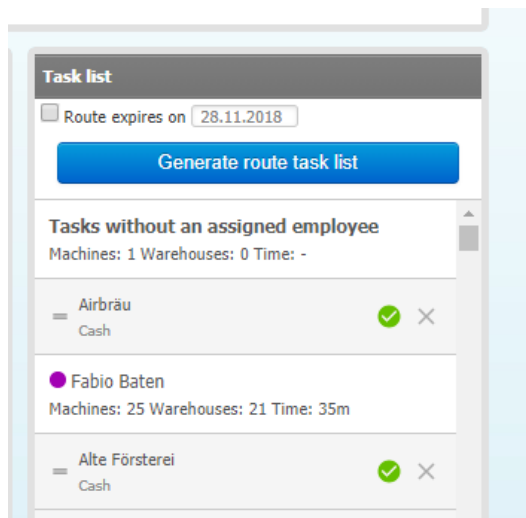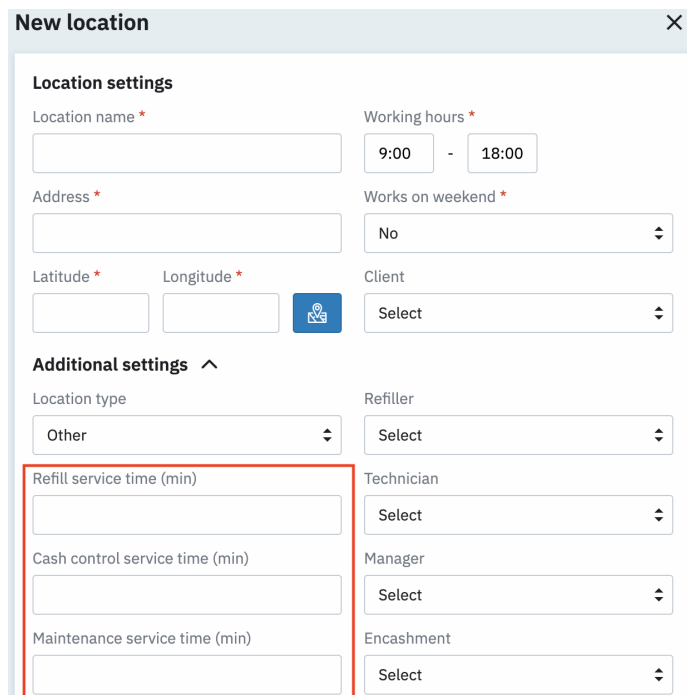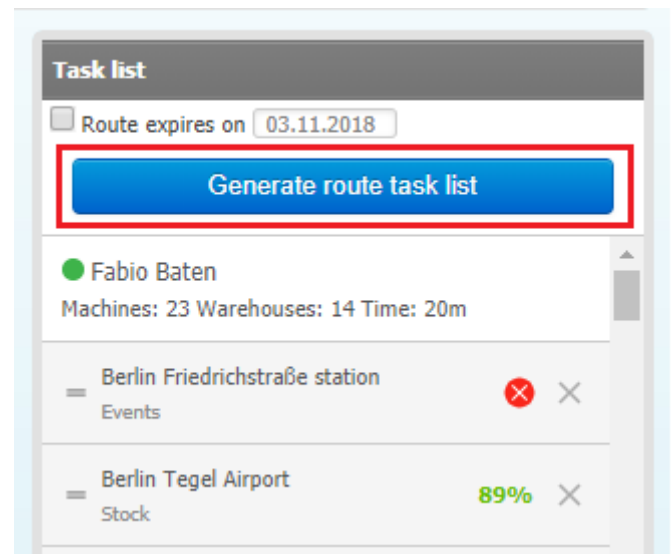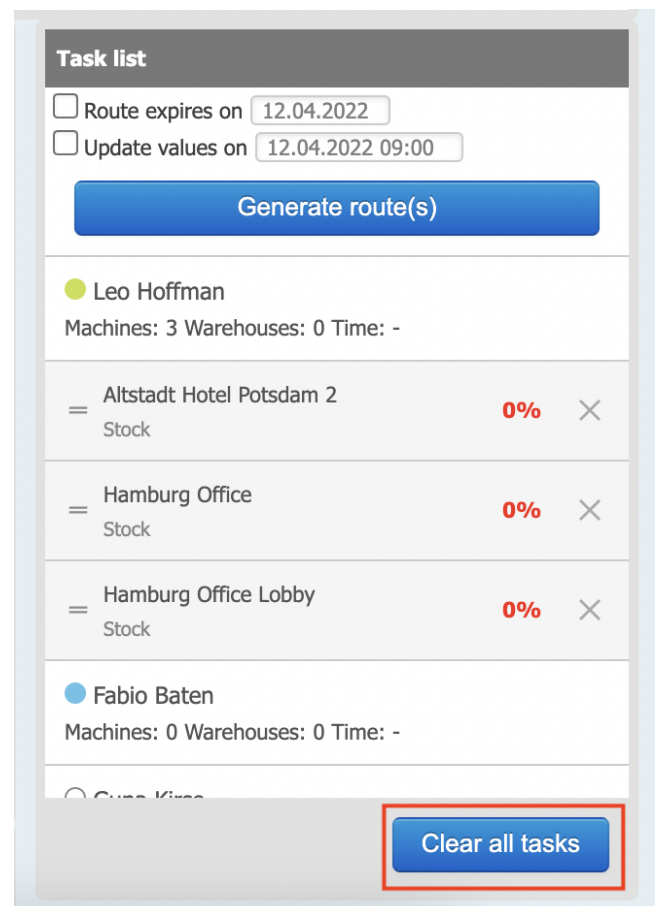|	
Tasks can also be deleted by clicking on the "X" icon.	**Task list** ☐ Route expires on 03.11.2018 **Generate route task list** ● Fabio Baten Machines: 23 Warehouses: 14 Time: 20m Remove task — Berlin Friedrichstraße station Events ❌ ✕

In case there are tasks that have not been mapped to specific employees, they will appear in the section "Tasks without an assigned employee". They must be either removed or assigned to employees before a route task list can be generated.	**Task list**
	
	☐ Route expires on 28.11.2018
	
	Generate route task list
	
	Tasks without an assigned employee
	Machines: 1 Warehouses: 0 Time: -
	
	— Airbräu
	  Cash ✅ ✕
	
	● Fabio Baten
	Machines: 25 Warehouses: 21 Time: 35m
	
	— Alte Försterei
	  Cash ✅ ✕

It is also possible to get an approximate time calculation for the completion of the route.	● Fabio Baten Devices: 2 Warehouses: 0 Time: 35m
In order to see this information, it is necessary to fill in the appropriate service time information for the locations assigned to the particular machines. This can be done under Settings → Locations → add new or edit an existing location.	**New location** ✕ **Location settings** Location name * Working hours * [ ] [9:00] - [18:00] Address * Works on weekend * [ ] [No ▼] Latitude * Longitude * Client [ ] [ ] 📍 [Select ▼] **Additional settings** ⌃ Location type Refiller [Other ▼] [Select ▼] Refill service time (min) Technician [ ] [Select ▼] Cash control service time (min) Manager [ ] [Select ▼] Maintenance service time (min) Encashment [ ] [Select ▼]

Once everything is set, click on "Generate task list" to create the route for the selected employee or employees. This will automatically open the route list.	**Task list** ☐ Route expires on 03.11.2018 **Generate route task list** ● Fabio Baten Machines: 23 Warehouses: 14 Time: 20m = Berlin Friedrichstraße station ❌ ✕ Events = Berlin Tegel Airport 89% ✕ Stock
If you have, however, realized that the task list you have created is inaccurate and you'd like to start from scratch, simply click on "Clear all tasks".	**Task list** ☐ Route expires on 12.04.2022 ☐ Update values on 12.04.2022 09:00 **Generate route(s)** ● Leo Hoffman Machines: 3 Warehouses: 0 Time: - = Altstadt Hotel Potsdam 2 0% ✕ Stock = Hamburg Office 0% ✕ Stock = Hamburg Office Lobby 0% ✕ Stock ● Fabio Baten Machines: 0 Warehouses: 0 Time: - **Clear all tasks**

5. Route List

Tutorial: **https://www.youtube.com/watch?v=RxGcEzlf82Y**

To navigate to the route list, click on Planning → Route list

This will open the list of routes and provide information on the employee, number of machines/warehouses in the route, status and progress.
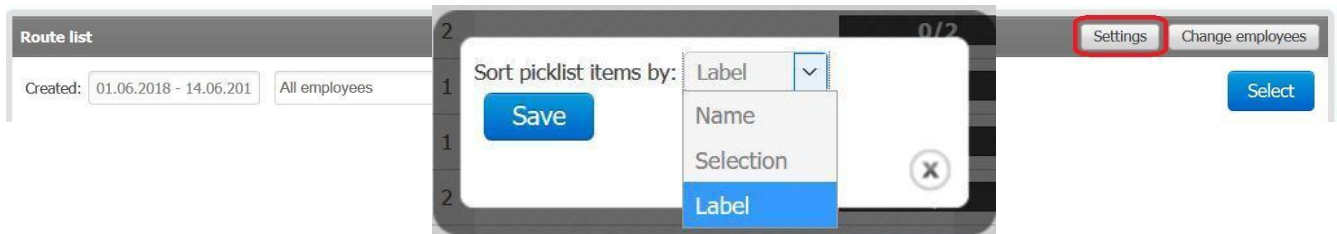
5.1. Sorting, filtering, downloading routes
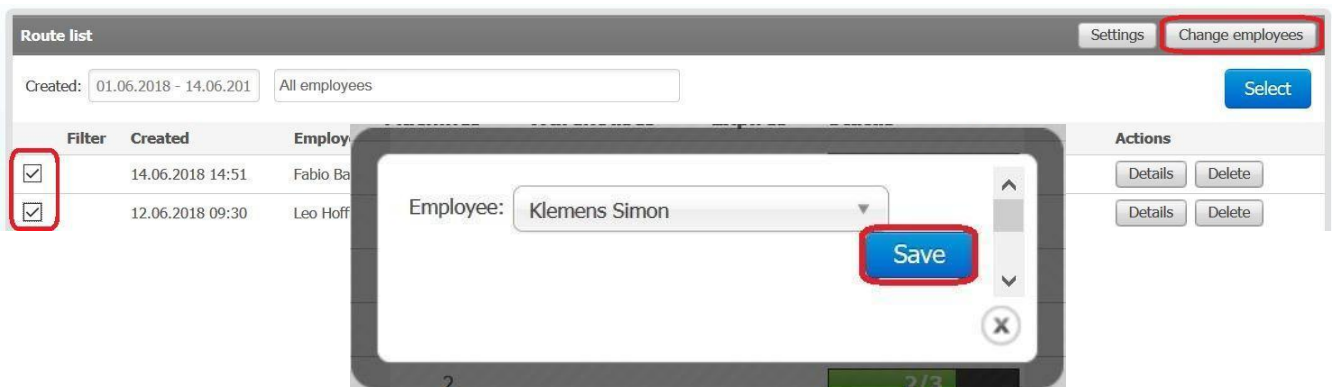
In this section, various actions can be performed:

1. Filter the route list by date and by employee.

2. Choose how the products must be sorted in a picklist.

3. Change the responsible employee of the whole route.

4. Download the task list in XLS and PDF formats, and download the Warehouse packing list (PDF only).

4.1. The packlist is a concise list of products meant for use in warehouses. The product list is organized by warehouse location; a value that you can add to each products in Settings → Products/Components.

Type	
Product	↕

Name *	Article
Bounty	V-0076

Price (incl. VAT)	VAT %
2	15

Deposit fee (incl. VAT)	Deposit VAT (%) %
0	0

Cost price (excl. VAT)	Warehouse location
1.88	Row 5 Shelf 4

5. Delete the route.

	Created	Status	Employee	Machines	Warehouses	Expires	Status	Task list			Actions	
☐	11.08.2021 10:08	Ready	Fabio Baten	4			0/4	XLS	PDF	Pack list	Details	Delete

5.2. Task list

Tutorial: **https://www.youtube.com/watch?v=yg3JLs9FEkg**

To check the details of a specific route, click on "Details":

☐	01.11.2018 17:26	Klemens Simon		2		0/3	XLS	PDF	Details Delete

Visit report

Planned	Visited	Task	Time
Location: 1. FC Hersbruck			
🔴 1. FC Hersbruck		Cash control	-
Location: Allianz Arena			
🔴 Allianz Arena Coffee		Product refill	-
🔴 Allianz Arena Coffee		Technical maintenance	-

Stock report   Cash control   Maintenance

Product	Critical	Expiry date	Planned stock	Filled stock	Stock difference
					Edit
Coffee Beans			648 g	0 g	-648 g
Coffee Beans Dark			575 g	0 g	-575 g
Espresso Cup (120ml)			11 pcs	0 pcs	-11 pcs
Large Cup (320ml)			36 pcs	0 pcs	-36 pcs
Milk 03			4 000 ml	0 ml	-4 000 ml
Small Cup (240ml)			33 pcs	0 pcs	-33 pcs

This will open the list of tasks on the right side, and the list of machines/warehouses for which particular tasks have been set on the left.

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 5 minutes' time.

	Created	Status	Employee	Machines	Warehouses	Expires	Status	Task list	Actions	
☐	15.04.2020 12:31	Update scheduled	Fabio Baten	0	2		0/2		Details	Delete

Visit report

Planned	Visited	Task	Time
Location: Café Kranzler			
🔴 Café Kranzler		Product refill	-
Location: Kafe Local			
🔴 Kafe Local		Product refill	-

Update scheduled for 16.04.2020 07:00   **Update now**

Stock report

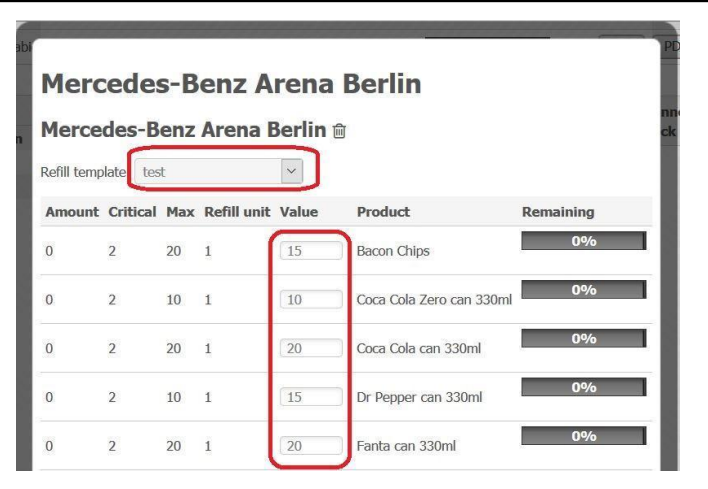| Product	Critical	Expiry date	Planned stock	Filled stock	Stock difference
Bacon Chips			55	0	-55
Beans 1			2 000 g	0 g	-2 000 g

5.2.1. Stock report

The stock report lists the planned stock per product (per all machines in the route).	**Stock report** 	Product	Critical	Expiry date	Planned stock	Filled stock	Stock difference
---	---	---	---	---	---
					Edit
Bacon Chips			28	0	-28
Coca Cola Zero can 330ml			13	0	-13
Coca Cola can 330ml			28	0	-28
Dr Pepper can 330ml			19	0	-19	
By clicking on the "Edit" button, you can change the amount to be refilled for each product in each of the machines as well as change the refill template used in each machine.	**Mercedes-Benz Arena Berlin** **Mercedes-Benz Arena Berlin** 🗑 Refill template [test] | Amount	Critical	Max	Refill unit	Value	Product	Remaining
---	---	---	---	---	---	---
0	2	20	1	15	Bacon Chips	0%
0	2	10	1	10	Coca Cola Zero can 330ml	0%
0	2	20	1	20	Coca Cola can 330ml	0%
0	2	10	1	15	Dr Pepper can 330ml	0%
0	2	20	1	20	Fanta can 330ml	0%	
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 Visit report (see section "Visit report").	
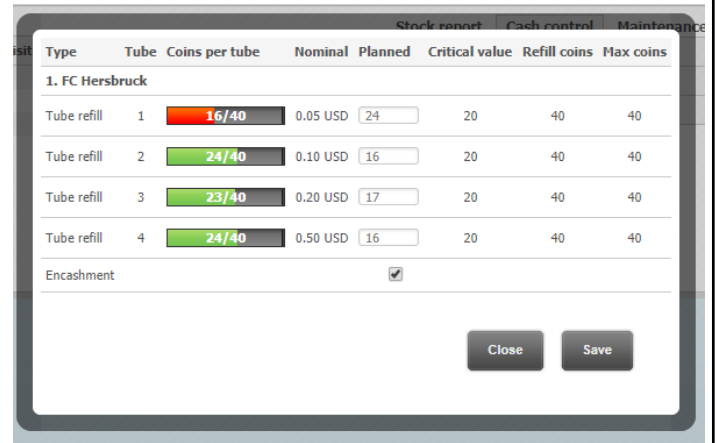
5.2.2. Cash control

The cash control tab lists coin changer refill and encashment tasks. The values are provided per machine.	**Stock report**	**Cash control**	**Maintenance** **Location: 1. FC Hersbruck** **1. FC Hersbruck** | Type	Nominal	Planned	Actual
---	---	---	---
Encashment			-
Tube refill	0.05 USD	24	-
Tube refill	0.10 USD	16	-
Tube refill	0.20 USD	17	-
Tube refill	0.50 USD	16	-
			Edit	

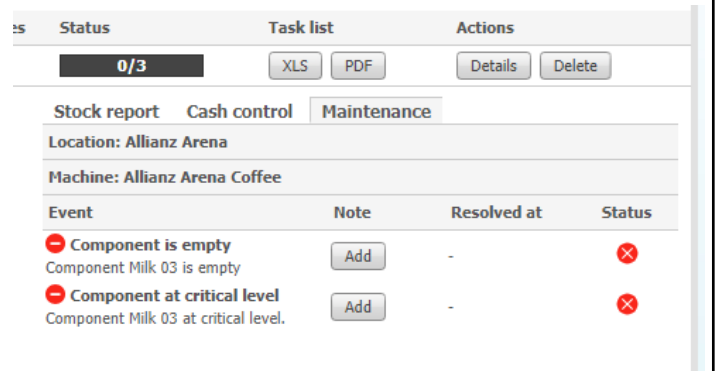Clicking on the "Edit" button allows editing the refillable values and enabling/disabling the encashment task.

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 Visit report (see section "Visit report").

5.2.3. Maintenance

The maintenance tab lists all events that have been filtered out according to the applied filters and triggers. They are sorted per machine.

It is possible to delete individual events by clicking on the red icon to the left.
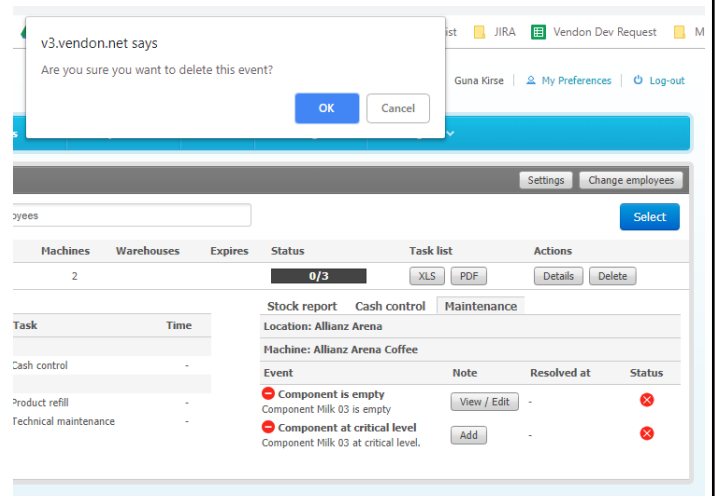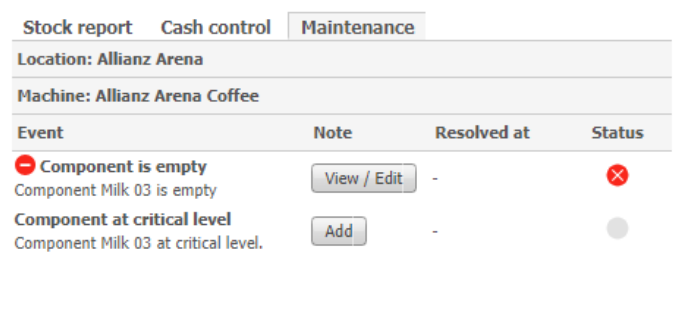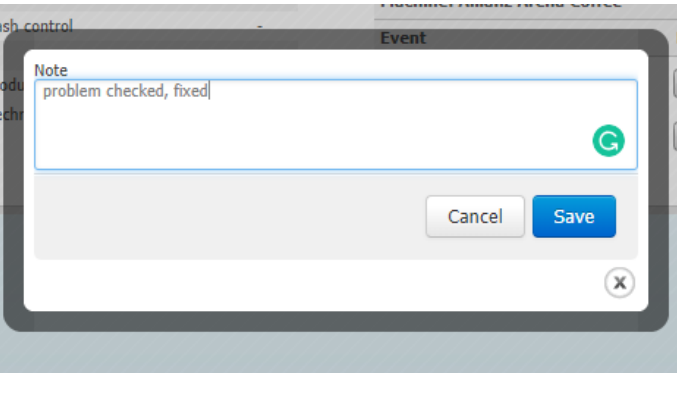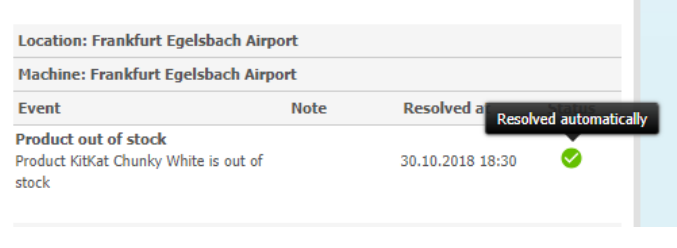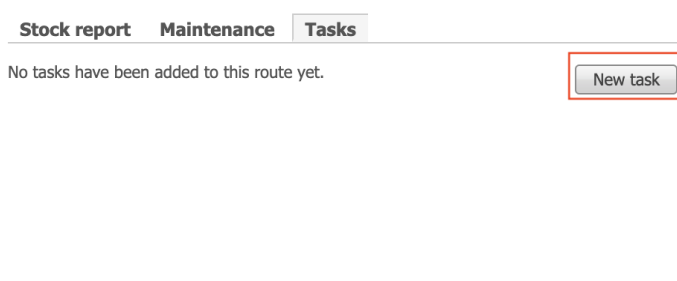
|	
The removed task will be marked with a grey icon.	Stock report　Cash control　**Maintenance** **Location: Allianz Arena** **Machine: Allianz Arena Coffee** **Event**　　　　　　　**Note**　**Resolved at**　**Status** 🔴 **Component is empty**　[View / Edit]　-　❌ Component Milk 03 is empty **Component at critical level**　[Add]　-　⚪ Component Milk 03 at critical level.
It is also possible to add a note to notify the manager that the problem has been checked. To add a note, click on "Add" in the column "Note". Notes can also be edited.	Note problem checked, fixed [Cancel] [Save]
These tasks are resolved once the respective event code is received. The system checks whether the events are still relevant every 10 minutes and marks resolved events as done automatically. Progress can be tracked in the Visit report (see section "Visit report").	**Location: Frankfurt Egelsbach Airport** **Machine: Frankfurt Egelsbach Airport** **Event**　　　**Note**　　**Resolved a** [Resolved automatically] **Product out of stock** Product KitKat Chunky White is out of　30.10.2018 18:30　✅ stock

5.2.4. Tasks

The "Tasks" tab is used to add extra tasks to all or some 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.	Stock report　Maintenance　**Tasks** No tasks have been added to this route yet.　[New task]

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 (head to section 6 to learn more about task lists). If you select a list, all tasks that belong to the list will be automatically added.
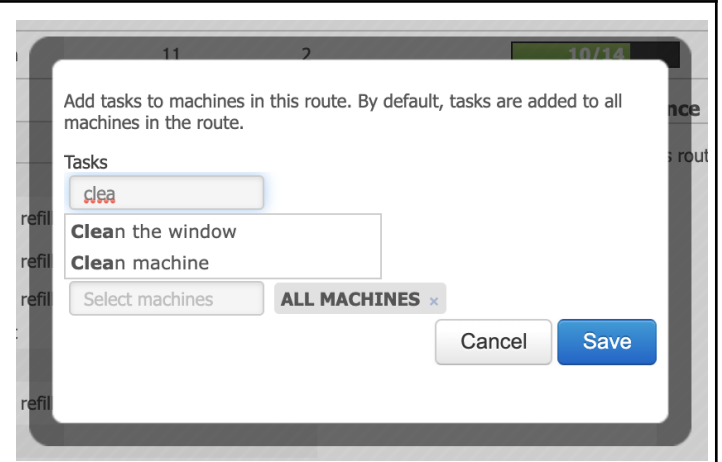

To remove a task you have selected, click on the X to the right of the task.

By default, tasks are mapped to all machines in the route. If you want to select particular machines, remove the tag *All machines* and select machines from the dropdown.

To add different tasks to different machines, work in steps – add tasks to a set of machines, press **Save**, and repeat the process.

NB: Once all route tasks for the particular machine have been completed (including refill, cash collection), new tasks can't be added to it.

When you're happy with your selection, press **Save** to add the tasks to the route.
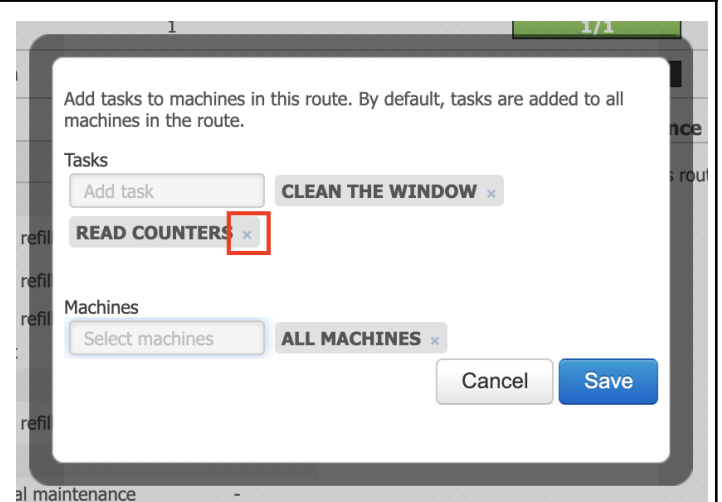
To complete a task, click on the respective **checkbox** and confirm completion.

Once the task has been completed, its status **cannot** be reversed. The timestamp of completion is also available.

All tasks are available in the Excel/PDF list as well, as well as the mobile app, where task completion can be confirmed too.

To remove a single task, click on the red icon to the right. This will remove the task from the machine.

To remove all tasks from a machine, click on the red icon to the left (section Visit report).

NB: If at least one task has been completed, bulk task removal from a machine is no longer available; only the remaining tasks can be deleted one by one

5.3. Visit report

On the left side, the Visit report is available that shows the progress made by the servicing staff. Tasks are listed by location.

You can also update the sequence of location visits. To do so, use the drag and drop functionality until you get the desired order.

Here, it is possible to delete specific tasks by clicking on the red icon to the left of the machine name.

When a machine is serviced – i.e., the task type assigned has been completed – a green check-mark will appear, along with the date and time.

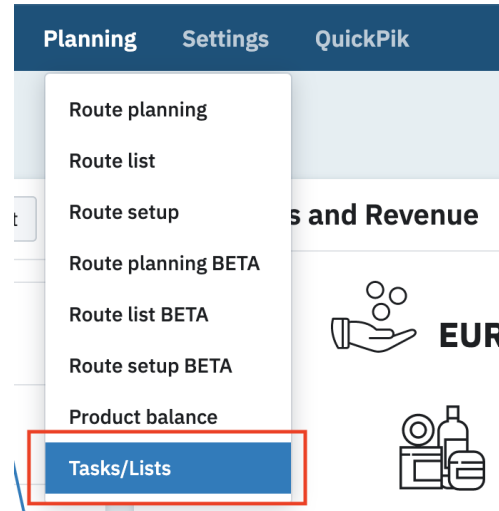Once all tasks have been completed, the task list won't be available for download anymore, but you will be able to see the visit report and all refill values by clicking on "Details".

6.   Tasks/Lists

In Section 5, adding extra tasks to the machines in the route was discussed. These tasks and lists can be managed from a separate page in the Cloud environment. To access it, head to Planning → Tasks/Lists.

Planning	Settings	QuickPik

Route planning

Route list

Route setup

Route planning BETA

Route list BETA

Route setup BETA

Product balance

Tasks/Lists

s and Revenue

EUR

All tasks and lists on this account are displayed in the table. The column "In route" shows whether the task/list is in an active route.

To create a new task or list, click "New task".

	List name	Tasks	Created	In route	
☐	Vending machine checklist	1. Clean window 2. Read counters 3. Check expired products	28.05.2021 09:34	No	•••
☐	Coffee machine list	1. Clean machine surface 2. Shake milk canister 3. Rinse coffee grounds bin	28.05.2021 09:25	No	•••

🗑 Delete   + New task

Enter the name of the task and press Enter; you can add multiple tasks at once. If you're happy with the tasks, press **Save**. To **remove** a task, click on X next to the name of the task.

If you'd like to save tasks as a list, enable the checkmark **Save as list** and provide the list name. You can change the list name and update its tasks any time.

NB: Tasks which already exist can also be added to lists. Simply start typing the name of the task and select it from the dropdown.

New task   ✕

To create a new task, type the name in the input field and press "Enter". You can create multiple tasks and save them as separate tasks or a list.

Tasks

| Enter task |

Clean machine surface ✕   Read counters ✕

☑ Save as list

List name

| |

Save   Close

To delete a task or a list, mark the checkbox and press **Delete**. You will need to confirm this action to avoid accidental deletions.

- Tasks/lists that are in active routes cannot be deleted.
- Tasks that are part of a list must be first removed from the list to be deleted.

Tasks/Lists

🗑 Delete (1)

☐	List name
☑	Vending machine checklist

In both cases, the checkbox will be disabled, and details will be provided on hovering the cursor over the checkbox.	**Tasks/Lists**
Task lists can be edited by clicking the three dots and then clicking "Edit". ● Task list names can be edited at all times. ● Tasks can be added and removed from lists only if the list is currently not in an active route.	