



# **Social Feedia ADM Training**

A quick start manual for Operators

**September 2019**

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## Document Revisions

Date	Author	Change Summary
4/30/19	Amy Volpe	Original draft
5/21/19	Laurie Sidwell	Branded document; reviewed for readability, grammar, and punctuation.
9/18/19	Amy Volpe	Added Pick List Inventory, Static Options and other sections.
9/27/19	Laurie Sidwell	Branded document; reviewed for readability, grammar, and punctuation.

## Getting Started

### Sign in to ADM

1. Log into ADM <https://adm.365retailmarkets.com>
2. The **Home** screen shows your active locations.

Location	Product	Menu	Reports	Admin	Super
<div> <div>List</div> <div>Active Locations</div> </div>					
records					
Location Name		Daily Revenue		Daily Transactions	
G&J IC		\$0.00		0	
G&J Marketing and Sales		\$0.00		6	
G&J Test		\$0.00		0	

### Update Min or Max fields at the Location

1. From the **Home** screen, click on the location where you are managing the inventory.
2. Scroll down to the list of tabs near the bottom of the screen, select the **Products** tab.
3. Use the Search bar on the right side of the screen to find the product you are adding to the location.
4. Update the **Min Stock** and **Max Stock** fields for that product.

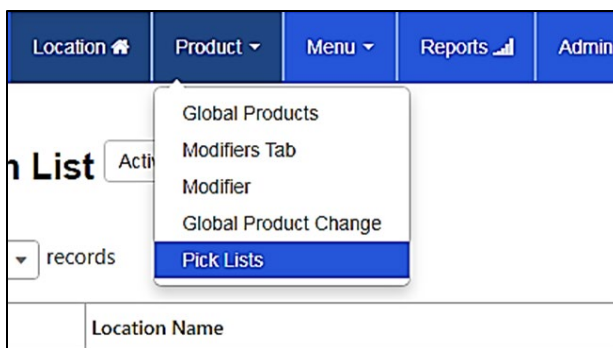
<div> <div>Cancel</div> <div>Save</div> <div>Update Prices</div> <div>Update Prices &amp; Full Sync</div> </div>												
<div> <div>Devices</div> <div>Products</div> <div>Promotions</div> <div>Home Commercial</div> <div>Close Commercial</div> <div>Tax Mapping</div> <div>Deposit Mapping</div> <div>Inventory</div> <div>Inventory List</div> </div>												
<div> <div>Add Product</div> <div>Export</div> </div>												
<div> <div>50</div> <div>records per page</div> </div>												
Name	Scancode	Category 1	Category 2	Price	Tax Name	Tax rate1	Tax rate2	Deposit	Min Stock	Max Stock	In Inv	Picklist Action
Diet Pepsi 12 oz	01205008,01280504	SODA		1.10		0.00%	0.00%	0.00	2	8	1	0
												At or Below Minimum

5. Click **Save**. (Be sure you click in the **Min Stock** and **Max Stock** fields rather than on the product.)
6. Repeat steps three and four until you have updated the **Min Stock** and **Max Stock** fields for all products that will be available at the location.
7. Click **Update Prices & Full Sync**.
8. Click **Save**.

**Note:** If you remove a product from a location, you will need to go into the location in ADM and change the **Min Stock** and **Max Stock** fields to zero, so the product will no longer “Push” to that location.

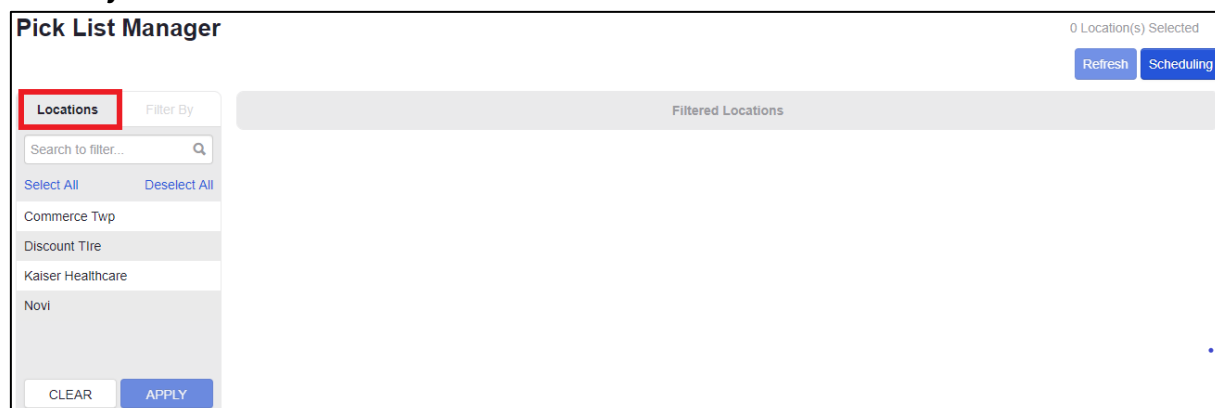
## Pick List Manager

1. Go to the **Product** tab in the Home screen.
2. Select **Pick Lists** from the drop-down menu. The **Pick List Manager** screen displays.



## Locations grid – Pick List Action

The screen has two tabs on the left, **Locations** and **Filter By**. **Locations** is selected by default and **Filter By** is greyed out. You must select one or more locations in the **Locations** tab for the **Filter By** tab to become active.

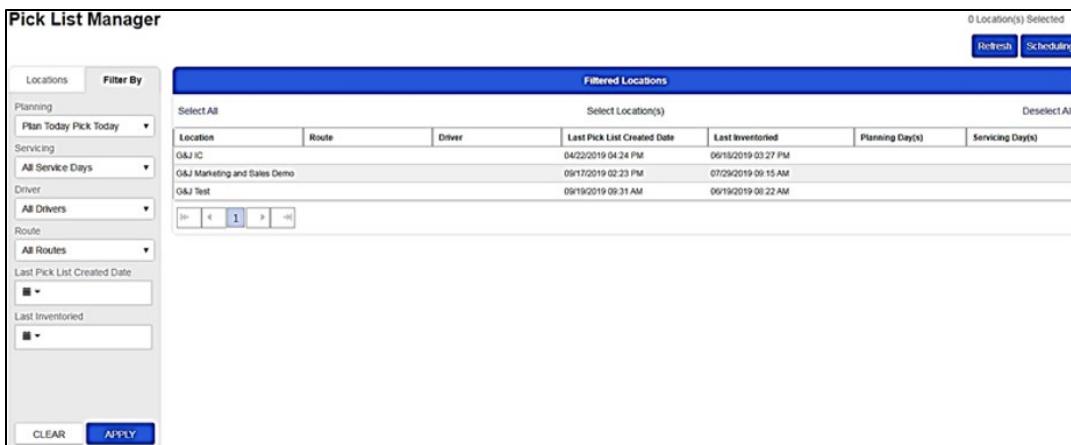


- Click on one or more locations in the **Locations** tab in the **Pick List Manager** screen.
- Click **APPLY** at the bottom of the tab. The **Filtered Locations** grid will display with information about the location(s) you selected.

## Pick List Changes to ADM

You can filter the grid by:

- Location
  - Route
  - Driver
  - Last Pick List Created Date
  - Last Inventoried
  - Planning day(s) (based on Plan vs Pick scheduling)
  - Servicing day(s) (based on Plan vs Pick scheduling)
- Click on the **Filter By** tab next to the **Locations** tab. The **Filter By** tab displays with six fields containing the following drop-down menus:
    - Planning
    - Servicing
    - Driver
    - Route
    - Last Pick List Created Date
    - Last Inventoried



The screenshot shows the 'Pick List Manager' interface. On the left, there are two tabs: 'Locations' and 'Filter By'. The 'Filter By' tab is active, showing a sidebar with various filter categories: Planning, Servicing, Driver, Route, Last Pick List Created Date, and Last Inventoried. Each category has a dropdown menu. At the bottom of the sidebar are 'CLEAR' and 'APPLY' buttons. The main area displays the 'Filtered Locations' grid. The grid has columns for Location, Route, Driver, Last Pick List Created Date, Last Inventoried, Planning Day(s), and Servicing Day(s). The grid shows three rows of data. Above the grid, there are 'Select All' and 'Deselect All' buttons. At the top right of the interface, there is a status bar showing '0 Location(s) Selected' and 'Refresh' and 'Scheduling' buttons.

Location	Route	Driver	Last Pick List Created Date	Last Inventoried	Planning Day(s)	Servicing Day(s)
GAJ IC			04/22/2019 04:24 PM	06/19/2019 03:27 PM		
GAJ Marketing and Sales Demo			06/17/2019 02:23 PM	07/29/2019 09:15 AM		
GAJ Test			06/19/2019 09:31 AM	06/19/2019 08:22 AM		

**Note:** You can quickly send pick lists to LightSpeed or push to inventory from the **Pick List Manager** screen when one or more locations have been selected.

**Pick List Manager** 3 Location(s) Selected

[Export](#) [Refresh](#) [Push To Inventory](#) [Plan Pick List\(s\)](#) [Scheduling](#)

**Locations** **Filter By**

Planning  
Plan Today Pick Today ▼

Servicing  
All Service Days ▼

Driver  
All Drivers ▼

Route  
All Routes ▼

Last Pick List Created Date  
▼

Last Inventoried  
▼

[CLEAR](#) [APPLY](#)

**Filtered Locations**

Select All Select Location(s) Deselect All

Location	Route	Driver	Last Pick List Created Date	Last Inventoried	Planning Day(s)	Servicing Day(s)
G&J IC			04/22/2019 04:24 PM	06/18/2019 03:27 PM		
G&J Marketing and Sales Demo			09/17/2019 02:23 PM	07/29/2019 09:15 AM		
G&J Test			09/19/2019 09:31 AM	06/19/2019 08:22 AM		

1

6. Select **one or more locations** in the grid. Four new buttons will display on the right side of the screen.

[Export](#) [Refresh](#) [Send To LightSpeed](#) [Plan Pick List\(s\)](#)

OR

[Export](#) [Refresh](#) [Push To Inventory](#) [Plan Pick List\(s\)](#) [Scheduling](#)

**Export** button – export your selections to an Excel spreadsheet

**Refresh** button – refresh the screen

**Important:** When you “refresh” the **Pick List Manager** or **Pick List** screen, the system will update the picklist and clear any revisions (add, remove, edits) previously made to the pick lists).

**Send to LightSpeed** button – quickly send pick lists to LightSpeed

OR

**Push to Inventory** button – push pick list to inventory

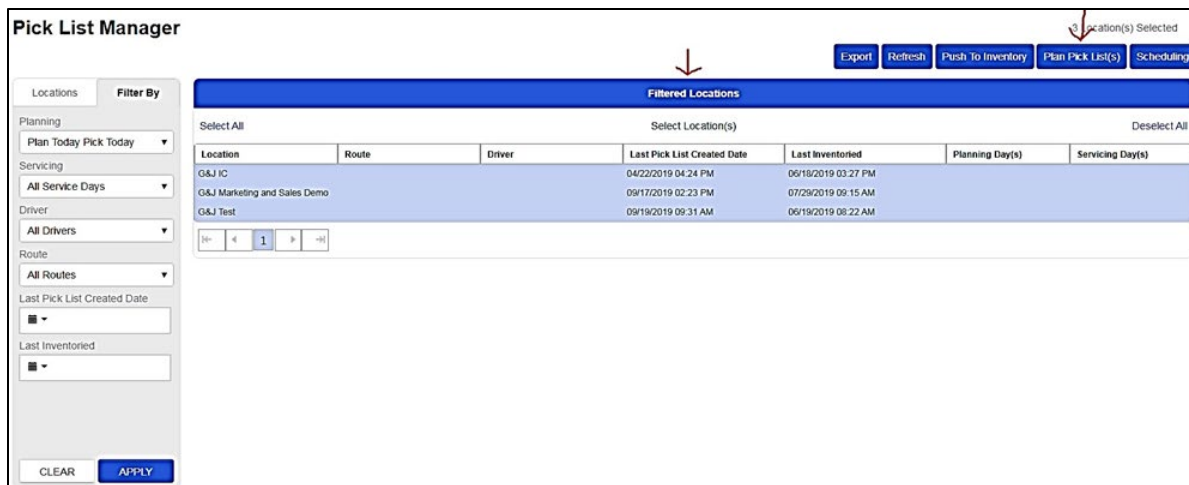
**Note:** If your Org has LightSpeed, you will see the **Send to LightSpeed** button instead of the **Push to Inventory** button in both the **Pick List Manager** and the **Pick List** screens.

**Plan Pick List(s)** button – further refine your pick lists before sending them to LightSpeed or pushing them to inventory.

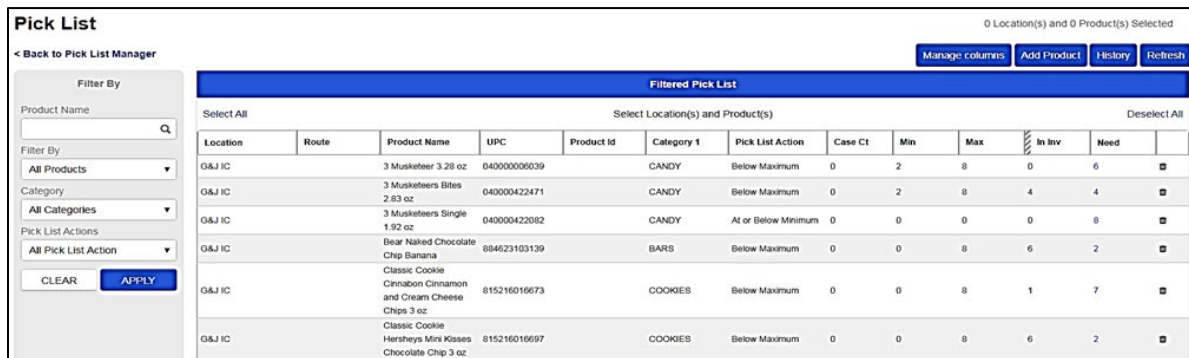
## Pick List screen Replenishing your locations

The new Pick List screen allows you to manage one or more of the pre-filtered locations. To get to the **Pick List** screen from the **Pick List Manager** screen:

1. Select **one or more locations** in the **Locations** tab. Click **APPLY**. The **Filtered Locations** grid will display.
2. Select **one or more locations** in the **Filtered Locations** grid.



3. Click the **Plan Pick List(s)** button on the right-side of the screen. (see above)



The **Pick List** screen will display showing the location(s) you selected. This screen shows additional columns of data including:

- Product Name
- UPC
- Product ID
- Category 1
- Pick List Action

**Note:** Any changes made to the pick lists on this screen (e.g., adding, removing, adjusting the **Need** quantity) will be automatically saved if you must leave this screen temporarily.

**Pick List** 0 Location(s) and 0 Product(s) Selected

[< Back to Pick List Manager](#) [Manage columns](#) [Add Product](#) [History](#) [Refresh](#)

**Filter By**

Product Name

Filter By

**All Products** ▼

**Category** ▼

**All Categories** ▼

**Pick List Actions** ▼

**All Pick List Action** ▼

[CLEAR](#) [APPLY](#)

**Filtered Pick List**

Select All Deselect All

Location	Route	Product Name	UPC	Product Id	Category 1	Pick List Action	Case Ct	Min	Max	In inv	Need	
G&J IC		3 Musketeer 3.28 oz	04000006039		CANDY	Below Maximum	0	2	8	0	6	<input type="checkbox"/>
G&J IC		3 Musketeers Bites 2.83 oz	040000422471		CANDY	Below Maximum	0	2	8	4	4	<input type="checkbox"/>
G&J IC		3 Musketeers Single 1.92 oz	040000422082		CANDY	At or Below Minimum	0	0	0	0	8	<input type="checkbox"/>
G&J IC		Bear Naked Chocolate Chip Banana	884623103139		BARS	Below Maximum	0	0	8	6	2	<input type="checkbox"/>
G&J IC		Classic Cookie Cinnamon and Cream Cheese Chips 3 oz	815216016673		COOKIES	Below Maximum	0	0	8	1	7	<input type="checkbox"/>
G&J IC		Classic Cookie Hersheys Mini Kisses Chocolate Chip 3 oz	815216016697		COOKIES	Below Maximum	0	0	8	6	2	<input type="checkbox"/>

When one or more locations have been selected in the **Filtered Pick List** grid, you can:

- Push pick lists to inventory by clicking the **Push to Inventory** button or send pick lists to LightSpeed by clicking the **Send to LightSpeed** button.
- Perform a pick list export and refresh by clicking the **Export** and **Refresh** buttons.

**Important:** When you "refresh" the **Pick List Manager** or **Pick List** screen, the system will update the pick lists and clear any revisions (add, remove, edits) previously made to the pick lists.

- View the pick list history by clicking the **History** button.

Manage columns
Add Product
History
Export
Refresh
Push To Inventory

OR

Manage columns
Add Product
History
Export
Refresh
Send To LightSpeed



## Pick List Action Options – Hide from Pick List

When the Pick List Action is set to “**Hide From Pick List**”, the product will not appear in the pick list regardless of Min/Max or static order settings. You can filter from the **Pick List** screen using this option if you need to quickly find any or all products set to this Pick List Action. However, these products will not appear in the pick list by default.

The “Hide From Pick List” option can be accessed from the **Product** tab and the **Location** tab of the **Home** screen in ADM.

From the **Product** tab on the **Home** screen:

1. Select **Global Products** from the drop-down menu. The **Global Products** screen will display.
2. Click on **any product** in the grid. The **Product Summary** screen, **Info** section will display for the product you selected.

### Product Summary

Info

Name	Blackberry Mineral Water	Scancode(s)	9752816548321	Add
Short Name	Blackberry Mineral Water			Delete
Description		Userkey		
Category1	BEVERAGES	Price	1.75	
Category 2	-Choose-	Cost	1.00	
Category 3	-Choose-	Unit Of Measure	Each	
Tax Category	LASTAXATION	Weigh	No	
Deposit Category	-Choose-	Tare Weight	0.00	
Type	Healthy	Discount	No	
Min Stock	4	Case Count	0	
Max Stock	12	Is Disabled	No	
Pick List Action	At or Below Minimum	Loyalty Multiplier	1	
Kitchen/Prep Printer	-Choose-	GUID	c8585e2b1311f00749988c8f7f48ccdc	

3. Click in the **Pick List Action** field on the left side of the screen.
4. Select **Hide from Pick List** from the drop-down menu.

5. Scroll down and click **Save**.

OR

Scroll further down to the **Locations** section of the **Product Summary** screen.

6. Click in the *Pick List Action* column of the grid. The cell where you clicked is highlighted with a border.

Locations

Extend

50 records per page

Search:

Name	Address	City	State	Price	Min Stock	Max Stock	Pick List Action	Loyalty Multiplier
Commerce Twp	11104 Farmingdale Lane	Commerce Twp	MI	1.75	3	10	Below Maximum	1
Discount Tire	1967 Palmer Court	Wixom	MI	1.75	3	10	Below Maximum	1
Kaiser Healthcare	5206 Round Road	Livonia	MI	1.75	3	10	Below Maximum	1
Novi	41740 Brownstone Drive	Novi	MI	1.75	3	10	Below Maximum	1

Showing 1 to 4 of 4 entries

← Previous 1 N

7. Click in the cell. A drop-down menu will display with four options.

8. Select **Hide from Pick List**.

From to the **Location** tab on the **Home** screen:

1. Click on a **location**. The **Location Summary** screen will display for that location.
2. Scroll down near the bottom and click the **Products** tab.
3. Click on **any cell** in the *Picklist Action* column of the grid. The cell where you clicked will become highlighted with a border.

Add Product Export Manage Columns

Show 50 records

Clear Filters Search...

Name	Scancode	Category 1	Price	Tax 1	Deposit	Min Stock	Max Stock	In Inv	Case	Picklist Action
Barg's Diet Root Beer	8546975697	BEVERAGES	\$1.50	0.00%	\$0.00	2	8	0	0	Below Maximum
Blackberry Mineral Water	9752816548...	BEVERAGES	\$1.75	0.00%	\$0.00	4	12	0	0	At or Below Minimum
Diet Pepsi	52587513582	BEVERAGES	\$1.75	0.00%	\$0.00	3	10	0	0	Below Maximum
Gold's Pretzel Stix	59748231589	SNACKS	\$1.25	0.00%	\$0.00	4	10	0	0	At or Below Minimum
Kashi Health Bar	7958412589...	SNACKS	\$1.65	0.00%	\$0.00	3	10	0	0	At or Below Minimum

5 matching records

← Prev 1 Next →

4. Click again in the same **cell**. A drop-down menu will display with four options.

5. Click **Hide from Pick List**.

## Adding Product(s) to Pick List

1. Click on the **Product** tab in the **Home** screen.
2. Select **Pick Lists** from the drop-down menu.
3. Select **one or more locations** in the **Locations** tab.
4. Click **APPLY**.
5. Select **one or more locations** in the **Filtered Locations** grid.
6. Click the **Plan Pick List(s)** button on the right. The **Pick List** screen will display.
7. Click the **Add Product** button on the right. The **Add Product(s) to Pick List** pop-up window will display.

Add Product(s) to Pick List

Select Location to add product(s) to: Commerce Twp

Search:

Product Name	Scancode	Category 1	Category 2	Category 3	Need
Yogurt Kind Bar	5299745632158	SNACKS			0
Plain Jane Cookie	8547963215879	SNACKS			0
Healthy Bar	1258469783325	SNACKS			0
Act II Popcorn	3457389539	SNACKS			0
Strawberry Yogurt Crumbles	1587531258	SNACKS			0
Nut N' Honey Bar	155789532548	SNACKS			0
Vanilla Coke	458971135522	BEVERAGES			0
Honey Oat Cookies	954786231589	SNACKS			0
Diet 7-Up	1597753123654	BEVERAGES			0
Peach Smoothie	154698725941258	BEVERAGES			0
Sunny-D Orange Juice	5874136958745	BEVERAGES			0

Showing 11 products (filtered from 11 total products)

0 Product(s) to Add

Close

Preview

8. In the **Add Product(s) to Pick List** pop-up window, you can add product(s) to any location by:
  - Selecting the location from the **Select Location to add product(s) to:** drop-down menu.
  - Searching for the product by name or category.
  - Entering a **Need** value for those product(s).

When a **Need** value is added that is greater than zero, it will be included in the **Add to Product** list.

9. Click the **Preview** button to preview the list before finalizing it.

To add more than one type of product, repeat the search. Be sure to enter the **Need** value.

The final products that you want to add will have the **Need** value that you entered included in the pick list.

- Click the **Add** button to finalize the products you want to add to the pick list for the location selected and return to the **Pick List** screen.

**Note:** When a location has at least ONE product with a **Need** value, the **Location** drop-down menu will be locked and cannot be changed to a different location. You must either click **Cancel** and stop adding products or finish the location you are working on before starting on another location.



Product Name	Scancode	Category 1	Category 2	Category 3	Need
Kettle Brand Sea Salt & Vinegar Chip 1.5 oz	841141127504	CHIPS			6
Grandmas Mini Sandwich Cremes Vanilla Flavored Cookies 3 oz	026400092722	COOKIES			6

- You can add additional product(s) to a location's pick list by updating the quantity in the **Need** column
- Click **Add** to add the product(s) to your pick list and return to the **Pick List** screen.

## Export Some or All Pick List Product(s)

You can export one or more locations and products by selecting those locations and products or by clicking **Select All** to export the entire filtered pick list.

To export data:

- Select **one or more locations** or products from the **Filtered Pick List** grid in the **Pick List** screen. Two new buttons will display in the group of buttons on the right side of the screen, they are the **Export** button and the **Push to Inventory** or **Send to LightSpeed** button.
- Click the **Export** button. You will be prompted to save your selected locations or products in an Excel file.
- Open the Excel file to see your pick list data.

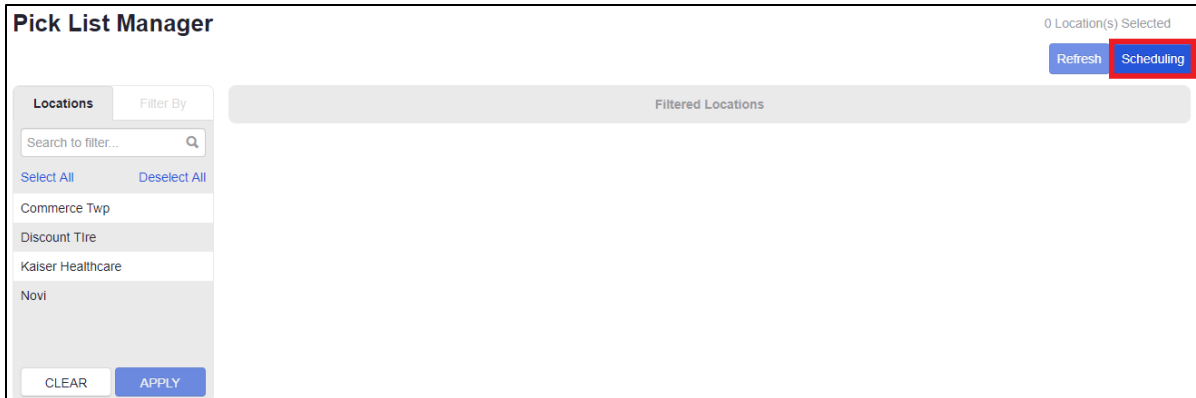
## Route Scheduling screen

The **Route Scheduling** screen allows you to set one or more service days, and Pick List Preferences per service day, across one or more locations, all from one screen. This provides the tool you need to set the cadence of how to handle pick list planning vs picking schedules.

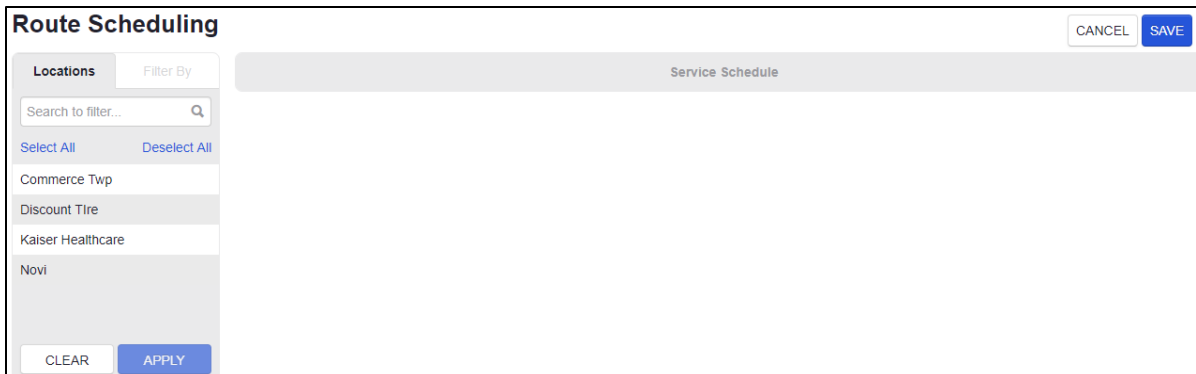
To get to the **Route Scheduling** screen:

- Click the **Product** tab in the **Home** screen.

2. Click **Pick Lists** from the drop-down menu. The **Pick List Manager** screen will display.



3. Click the **Scheduling** button at the top right of the screen. The **Route Scheduling** screen will display.



## Service Schedule Grid

The **Route Scheduling** screen has two tabs, the **Locations** tab and the **Filter By** tab. The **Locations** tab is displayed by default.

1. Select one or more location(s) from the list in the **Locations** tab.
2. Click **APPLY** at the bottom of the tab. The **Service Schedule** grid will populate.

The grid contains the following columns:

- Location
- Route
- Driver
- Select Service Day(s) (M-SU)
- Plan vs Pick Preference

### Route Scheduling

Locations

Filter By

Search to filter...

Select All

Deselect All

Commerce Twp

Discount Tire

Kaiser Healthcare

Novi

CLEAR

APPLY

Service Schedule

Select Service Day(s)

Location	Route	Driver	M	TU	W	TH	F	SA	SU	Plan vs Pick Preferences
Commerce Twp	Select	Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Set Plan vs Pick Preference(s)
Discount Tire	Select	Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Set Plan vs Pick Preference(s)
Kaiser Healthcare	Select	Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Set Plan vs Pick Preference(s)

<-

<

1

>

>=

CANCEL

SAVE

**Note:** You can update the **Route** and **Driver** fields from this grid.

- Click on the **Filter By** tab. This tab offers three filters with drop-down menus to filter the data in the **Service Schedule** grid. The filters are:
  - Service Date
  - Driver
  - Route

## Set Plan vs Pick Preference pop-up window

- Click on the **cell** in the *Plan vs Pick Preferences* column that corresponds to the location where you want to set the preferences. The **Set Plan vs Pick Preference** pop-up window will display.

Set Plan vs Pick Preference

Service Day(s)	Plan vs Pick/Service Day Preference(s)
<input type="checkbox"/> Monday	Set Plan vs Pick Preference
<input type="checkbox"/> Tuesday	Set Plan vs Pick Preference
<input type="checkbox"/> Wednesday	Set Plan vs Pick Preference
<input type="checkbox"/> Thursday	Set Plan vs Pick Preference
<input type="checkbox"/> Friday	Set Plan vs Pick Preference
<input type="checkbox"/> Saturday	Set Plan vs Pick Preference
<input type="checkbox"/> Sunday	Set Plan vs Pick Preference

CANCEL

SAVE

The **Set Plan vs Pick Preference** pop-up window contains two columns:

- Service Day(s)** – which shows the days of the week (pre-selected if set from the Service Schedule grid).

- *Plan vs Pick/Service Day Preference(s)* – contains fields with drop-down menus that show these four options:
  - Plan Today Pick Today
  - Plan Today Pick Tomorrow
  - Plan Today Pick In Two Days
  - Plan Today Pick In Three Days

You can select or deselect any of the check boxes if you need to edit a service day selection and setting.

2. Click **Save** to save your preferences.

## Static Order

A new column called "*Static Order*" has been added to the **Location Summary** screen, in the **Location** tab grid. Use this option to set a standing order for a product at a certain quantity. When this is set for a product, the Min/Max values will be set to zero and not used in the pick list. Instead the Static Order quantity will always be ordered and included in the pick list with **Static Order** quantity as the **Need** quantity.

To get to the *Static Order* column:

1. Click the **Location** tab in the **Home** screen. The **Location List** screen will display.
2. Click on a **location**. The **Location Summary** screen will display.
3. Scroll down to the tabs near the bottom of the screen.
4. Click the **Products** tab.

To see the *Static Order* column:

5. Click on the grey striped **Hidden Columns** marker to the left of the *In Inv* column. A drop-down menu will display.

Show 50 records		Clear Filters Search							
Name	Scancode	Category 1	Price	Tax 1	Deposit	Min Stock	Max Stock	In Inv	Case
▽   Contains...	▽   Contains...	▽   Contains...	▽   Equals...	▽   Equals...	▽   Equals...	▽   Equals...	▽   Equals...	▽   Equals...	▽   Equals...
(BR) CUKE AND AVOCADO R...	636628067394		\$6.49	0.00%	\$0.50	0	0	0	0
12 item test	345343	8PERCENTTAX	\$0.10	0.00%	\$0.00	0	0	0	0
2 Eggs & Cheese Breakfast S...	BSAND19887		\$4.50	0.00%	\$0.50	0	0	0	0

6. Click **Static Order**. The new column will display to the left of the *In Inv* column.

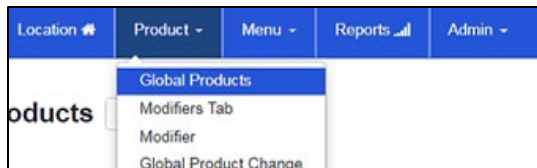
Show 50 records

Clear Filters Search...

Name	Scancode	Category 1	Price	Tax 1	Deposit	Min Stock	Max Stock	Static Or...	In Inv	Case	Pick
12 item test	345343	8PERCENTT...	\$0.10	0.00%	\$0.00	0	0	0	0	0	Bel
2518Prod8Scan2	1234561213...	WATER 20OZ	\$4.00	0.00%	\$0.00	4	3	0	-1	2	At d
(BR) CUKE AND AVOCADO ...	6366280673...		\$6.49	0.00%	\$0.50	0	0	0	0	0	At d
2 Eggs & Cheese Breakfast ...	BSAND19887		\$4.50	0.00%	\$0.50	0	0	0	0	0	At d
2 Eggs & Cheese Breakfast ...	BSAND1988...		\$450.00	0.00%	\$0.00	4	6	0	0	0	At d
3 Mini for \$12	3MINI100123		\$0.99	0.00%	\$0.50	2	6	0	0	0	At d

## Creating and Adding New Products – Global Catalog

1. Click the **Products** tab from the **Home** screen.
2. Select **Global Products** from the drop-down menu.



3. Select **Create New** on the right side of the screen. The **Product Create** screen will display.
4. Complete the required fields, which are:
  - Name
  - Category
  - Scan Codes
  - Sales Price
  - UserKey (Light Speed identifier) if applicable

**Product Create**

Info

Name	<input type="text"/>	Scancode(s)	<input type="text"/>
Short Name	<input type="text"/>	Userkey	<input type="text"/>
Description	<input type="text"/>	Price	<input type="text"/>
Category1	<input type="text"/>	Cost	<input type="text"/>
Category2	<input type="text"/>	Unit Of Measure	<input type="text"/>
Category3	<input type="text"/>	Weight	<input type="text"/>
Tax Category	<input type="text"/>	Tare Weight	<input type="text"/>
Deposit Category	<input type="text"/>	Discount	<input type="text"/>
Type	<input type="text"/>	Case Count	<input type="text"/>
Min Stock	<input type="text"/>	Is Disabled	<input type="text"/>
Max Stock	<input type="text"/>	Loyalty Multiplier	<input type="text"/>
Pick List Action	<input type="text"/>		



5. Click **Save and Extend** at the bottom of the screen. All of your locations will display.
6. Choose the locations where you would like to extend the product(s).
7. Click **Save and Next** if you want to create another new product. The **Product Create** screen will display.

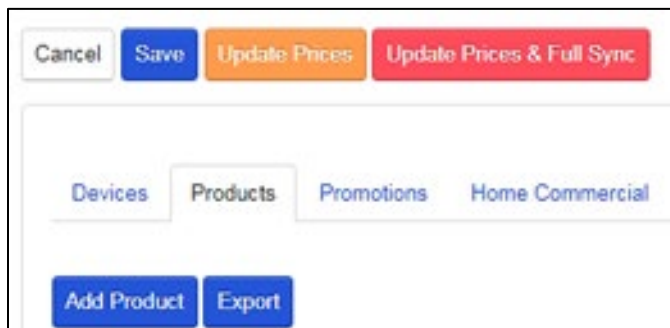
OR

Click **Save and Done** to return to the **Global Products** screen.

**Note:** If you miss a required field, ADM will not let you save the new product.

## Adding Product to a specific location

1. Click the **Location** tab in the **Home** screen. The **Location List** screen will display.
2. Click on a **location**. The **Location Summary** screen will display.
3. Scroll down to the tabs in the middle of the screen.



4. Click the **Products** tab.
5. Select **Add Product**. Your Global Catalog will display.
6. You can search by Name, Scan Code, or Select All.
7. Select the product you want to add.
8. Click **Add** in the lower right corner. The **Location Summary** screen will display again.

9. Scroll down to the tabs to see your new products listed in the **Products** tab.

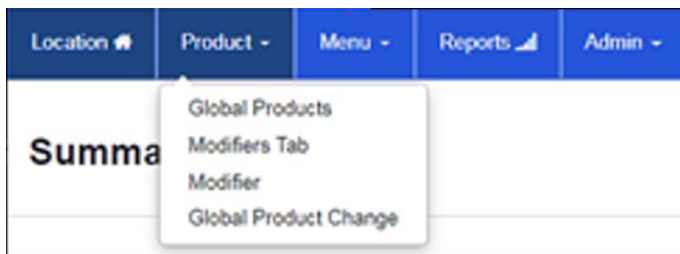


Name	Barcode	Category1	Category2	Category3
Original On The Go Midnight Cherry 16 oz	84266111005	ENERGY DRINK		
Original On The Go Orange Slice 16 oz	84266109368	ENERGY DRINK		
Ultimate On The Go Apple Sauce Cone 16 oz	84266106019	ENERGY DRINK		
Garden of Eatin' Greek Yogurt Non-Fat w/ Vanilla 6.3 oz	884700810021	DAIRY		
Link's Snack Bowl Eggs, Potatoes, & Cheddar Bacon 5.1 oz	814000029707	MEALS		
Link's Snack Bowl Nacho-Chicken 5.1 oz	814000029197	MEALS		
Link's Snack Bowl Teriyaki Chicken 5.1 oz	814000029177	MEALS		


## Making a change at a Global Level

Operators can change the price of a product in all of the kiosks at one location at one time by making the change at a global level. For example, increasing the price on all soda by \$0.10 for all kiosks at one location.

1. From the **Home** screen, click the **Products** tab.
2. Select **Global Product Change** from the drop-down menu. The **Global Product Change** screen will display.

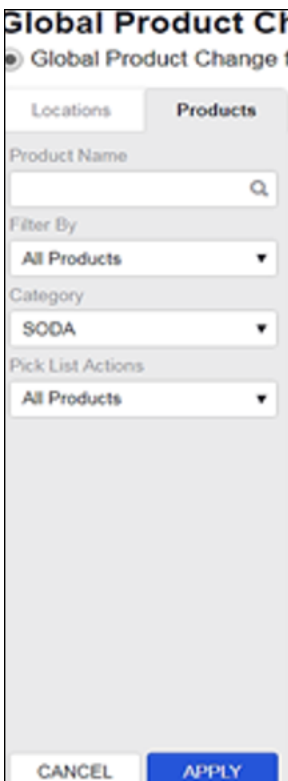


3. In the **Location** tab, select the location where you want to increase the price.



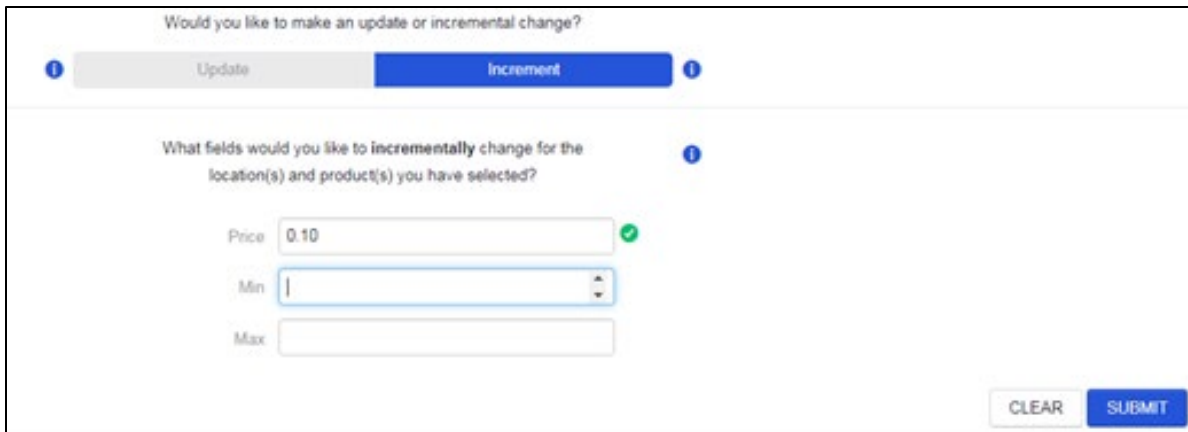
The screenshot shows the 'Global Product Change' form with the 'Locations' tab selected. It features a search bar labeled 'Search to filter', 'Select All' and 'Deselect All' buttons, and a list of locations: 'G&J Test', 'G&J Marketing and Sales', and 'G&J IC'. The 'G&J Test' location is highlighted. At the bottom are 'CANCEL' and 'APPLY' buttons.

4. Click **Apply**. The **Filtered Product** grid populates.



The screenshot shows the 'Global Product Change' form with the 'Products' tab selected. It includes a 'Product Name' search bar, a 'Filter By' dropdown set to 'All Products', a 'Category' dropdown set to 'SODA', and a 'Pick List Actions' dropdown set to 'All Products'. The 'APPLY' button is highlighted in blue. At the bottom are 'CANCEL' and 'APPLY' buttons.

5. Click the **Products** tab.
6. Click the **Category** filter and choose **Soda** from the drop-down menu.
7. Click **Apply**.
8. You can pick and choose which sodas you would like to modify or Select All.
9. Click **Next** on the right side of the screen.
10. Click the **Increment** tab.



11. Add **\$0.10** to the **Price** field.
12. Click **Submit**. A confirmation will display with the number of items that you have been chosen to be updated.
13. Click **OK**.

Select All		Which products would you like to include?						Deselect All	
Location	Product Name	Price	Cost	Min	Max	Category 1	Pick List Action	Case Count	
G&J Test	Diet Dr Pepper 12 oz	\$0.00		0	0	SODA	Below Maximum	0	
G&J Test	Diet Dr Pepper 16.5oz bottle	\$0.00		0	0	SODA	Below Maximum	0	
G&J Test	Diet Mountain Dew 12 oz	\$0.00	\$0.00	0	0	SODA	Below Maximum	0	
G&J Test	Diet Mountain Dew 16.9	\$0.00	\$0.00	0	0	SODA	Below Maximum	0	
G&J Test	Diet Pepsi 12 oz	\$0.43	\$0.00	0	0	SODA	Below Maximum	0	
G&J Test	Diet Pepsi 16.9 oz	\$0.00	\$0.00	0	0	SODA	Below Maximum	0	

## Taking an Inventory at a location

You have two options for taking an inventory:

1. Use the 365 Mobile Inventory app:
  - a. <https://365mobileinventory.com> is an inventory website that can be used on a phone or tablet. It has a scan function built in.
  - b. Login with the same credentials that you use for ADM.

- c. Choose the location with the inventory that you would like to update.
- d. Choose **Physical Inventory**.
- e. Choose **Freestyle**.
- f. You can scan the product or start typing the name or scancode.
- g. Update the **quantity**.
- h. Choose **Finish** when you have completed the inventory.

**Note:** If any products that have a min/max associated with them were not inventoried, the site will ask you if you want to inventory those products (e.g., you sold out of a product at that location).

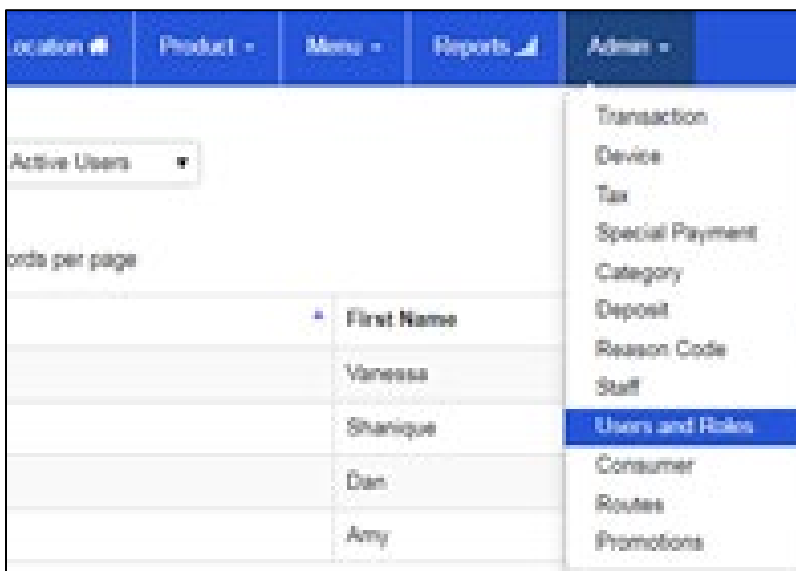
2. Use the **Inventory** tab on the **Location Summary** screen in ADM:
  - a. Search for the product(s) that you want to include in the inventory or select them from the grid.
  - b. Change the **quantity** in *In Inv* column.
  - c. Click **Save** above the row of tabs.

**Note:** The risk in using this method is that you might miss a product. The product will still scan at the location, but will reflect a negative quantity in ADM.

## Users and Roles

You can designate who has access to maintain your Social Feedia locations by assigning roles in ADM. The roles and access levels are:

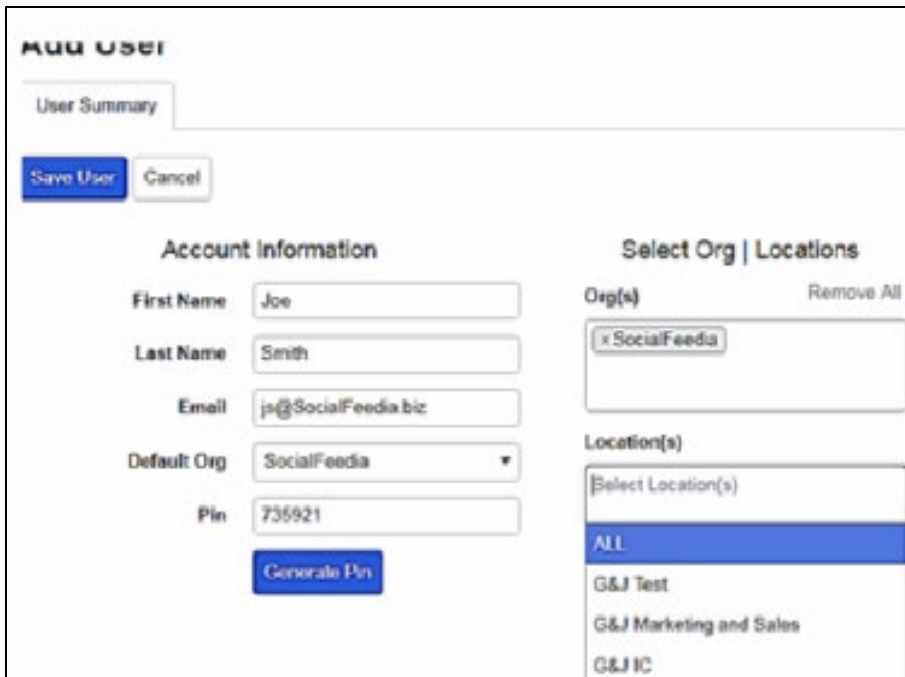
- **Operator** role – full access.
- **Driver** role – access to any inventory related tabs and reports.
- **Reporter** role – access to the **Reporting** tab.



1. Click the **Admin** tab in the **Home** screen.
2. Select **Users and Roles** from the drop-down menu.
3. Select **Create New** to add a user.

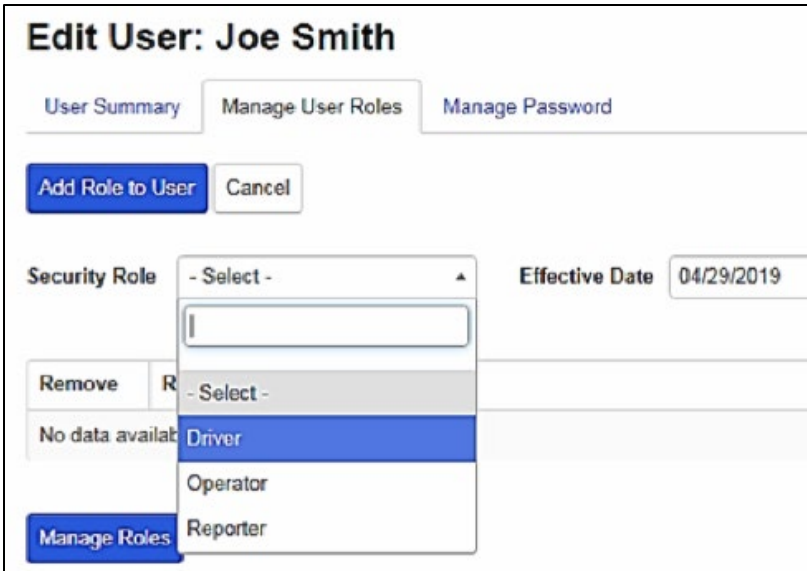


4. Complete the **First Name, Last Name, Email, Default Org** (your company) fields.

A screenshot of the 'Add User' form. The form has a title 'Add User' and a tab 'User Summary'. Below the title are two buttons: 'Save User' and 'Cancel'. The form is divided into two main sections: 'Account Information' and 'Select Org | Locations'. The 'Account Information' section contains fields for 'First Name' (Joe), 'Last Name' (Smith), 'Email' (js@SocialFeedia.biz), 'Default Org' (SocialFeedia), and 'Pin' (735921). There is a 'Generate Pin' button below the 'Pin' field. The 'Select Org | Locations' section contains a list of 'Org(s)' with 'SocialFeedia' selected, and a list of 'Location(s)' with 'ALL' selected. There is a 'Remove All' link next to the 'Org(s)' list.

5. Select the **location(s)** where you want them to have access.
6. Click **Save User**. The **Edit User: [New User's name]** screen will display.
7. In this screen, you can assign them a role.
8. Select the **Manage User Roles** tab.

9. Select the role to assign to the user from the drop-down menu.



**Edit User: Joe Smith**

User Summary Manage User Roles Manage Password

Add Role to User Cancel

Security Role - Select - Effective Date 04/29/2019

Remove R - Select -

No data available

Driver

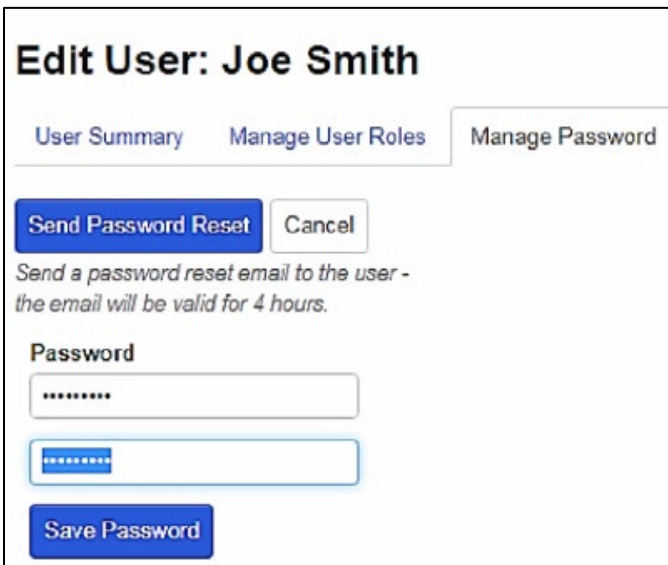
Operator

Reporter

Manage Roles

10. Select the **Add Role to User**.

**Note:** If a user forgets their password you can either send them a Password Reset email or set a generic password for them.



**Edit User: Joe Smith**

User Summary Manage User Roles Manage Password

Send Password Reset Cancel

Send a password reset email to the user - the email will be valid for 4 hours.

Password

\*\*\*\*\*

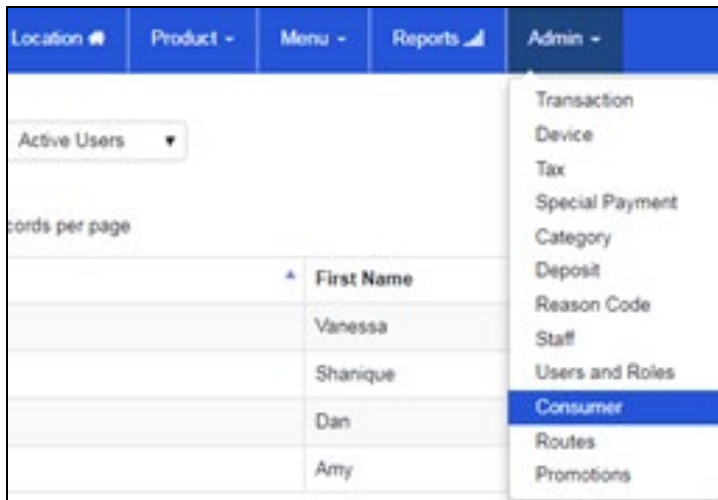
\*\*\*\*\*

Save Password

## Consumers

When a consumer downloads the Social Feedia app and sets up an account, their information is stored in the **Consumers** tab in ADM. The following is what you can manage on behalf of the Consumer.

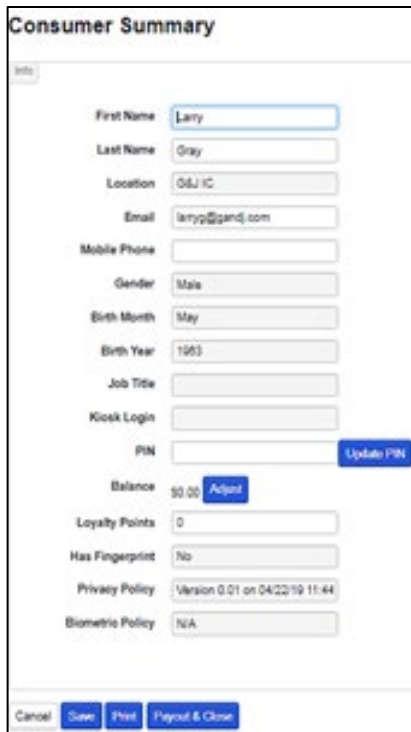
1. Click the **Admin** tab in the **Home** screen.
2. Select **Consumer** from the drop-down menu.



When a consumer leaves a company, you will want to give them a refund for the balance in account. To do so:



3. Click on the **person's name**.



The screenshot shows a 'Consumer Summary' form with the following fields and values:

Field	Value
First Name	Larry
Last Name	Gray
Location	Odj IC
Email	larryg@gsnd.com
Mobile Phone	
Gender	Male
Birth Month	May
Birth Year	1953
Job Title	
Kiosk Login	
PIN	
Balance	\$0.00
Loyalty Points	0
Has Fingerprint	No
Privacy Policy	Version 0.01 on 04/22/19 11:44
Biometric Policy	N/A

Buttons at the bottom: Cancel, Save, Print, Payout & Close. There is also an 'Update PIN' button next to the PIN field.

4. Click **Payout and Close** at the bottom of the screen.

365 will include those funds **in** your next ACH deposit. You can give the funds the location where they can refund the user

You may also want to add funds to a consumer's account for special occasions such as birthdays, Social Feedia Grand Opening at a location, Employee of the month, etc. To do so:

5. Increase the balance of their account. These funds would be taken **out** of your ACH deposit.

If a Consumer **loses their password**, you can create a PIN for them. It must be four-digits.

If you scroll down in a Consumer's profile, you will see their Account Purchases, Account Funding, and any Account Adjustments, such as refunds for damaged or expired products.

Account Purchases

Date/Time	Transaction ID	Location	Payment Type	Amount
05/18/19 08:57 AM	bea00136C-1558187812	The Salon Academy	Account	\$0.75
05/15/19 08:54 AM	bea00136C-1557928432	The Salon Academy	Account	\$1.00
05/14/19 05:02 PM	bea00136C-1557871349	The Salon Academy	Account	\$1.00
05/14/19 01:01 PM	bea00136C-1557856908	The Salon Academy	Account	\$1.50
04/30/19 07:01 PM	bea00136C-1556668911	The Salon Academy	Account	\$0.50
04/30/19 02:21 PM	bea00136C-1556652091	The Salon Academy	Account	\$0.50
04/30/19 01:02 PM	bea00136C-1556647349	The Salon Academy	Account	\$1.50
04/25/19 03:42 PM	bea00136C-1556224951	The Salon Academy	Account	\$0.50
04/25/19 03:37 PM	bea00136C-1556224585	The Salon Academy	Account	\$1.00
04/24/19 03:40 PM	bea00136C-1556138423	The Salon Academy	Account	\$1.50

Showing 1 to 10 of 14 entries

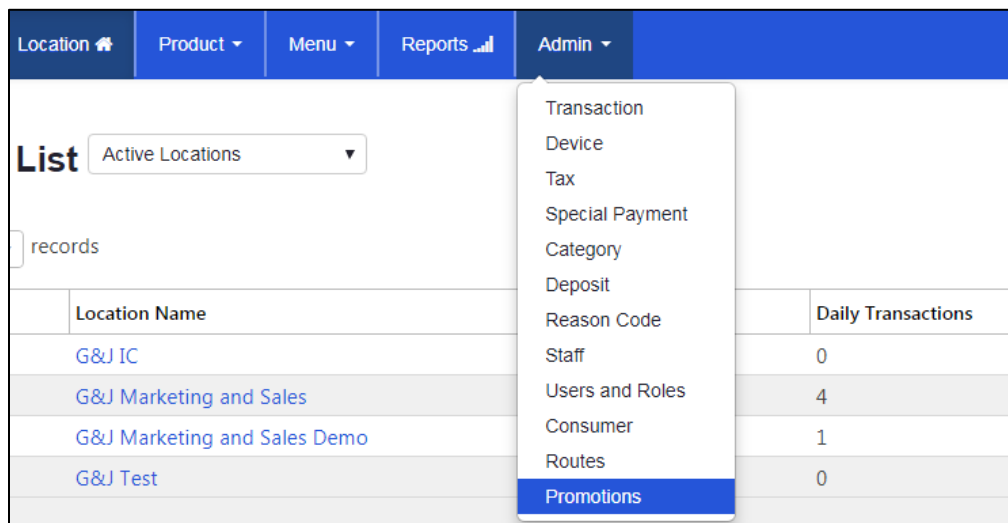
Account Funding

Date/Time	Transaction ID	Location	Reason Code	Amount	Last 4 CC	Host Reference
05/14/19 01:00 PM	000090W2	The Salon Academy	Funding	\$10.00	*****9598	625696767
04/23/19 02:10 PM	000089FX	The Salon Academy	Funding	\$10.00	*****4649	1907121844

## Promotions

You have the ability to set up a variety of different promotions in ADM.

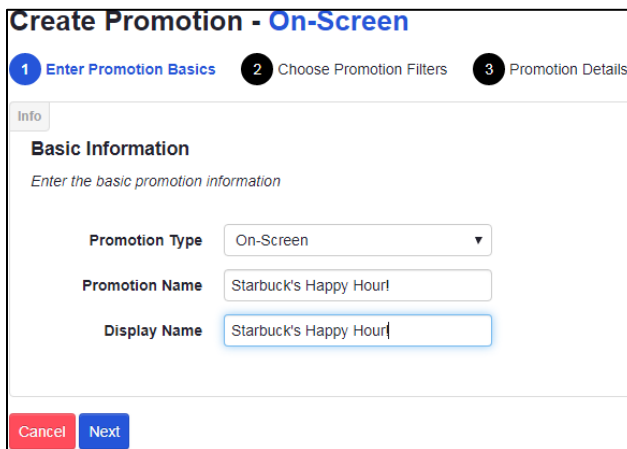
1. Click the **Admin** tab.



The screenshot shows the ADM interface with the 'Admin' tab selected in the top navigation bar. A dropdown menu is open under 'Admin', listing various options: Transaction, Device, Tax, Special Payment, Category, Deposit, Reason Code, Staff, Users and Roles, Consumer, Routes, and Promotions. The 'Promotions' option is highlighted in blue. In the background, a table titled 'List' shows 'Active Locations' with a dropdown arrow. Below the table, there are four records for 'Location Name': 'G&J IC', 'G&J Marketing and Sales', 'G&J Marketing and Sales Demo', and 'G&J Test'. To the right of the table, a 'Daily Transactions' column shows values: 0, 4, 1, and 0 respectively.

2. Select **Promotions** from the drop-down menu. The **Promotions** screen will display.

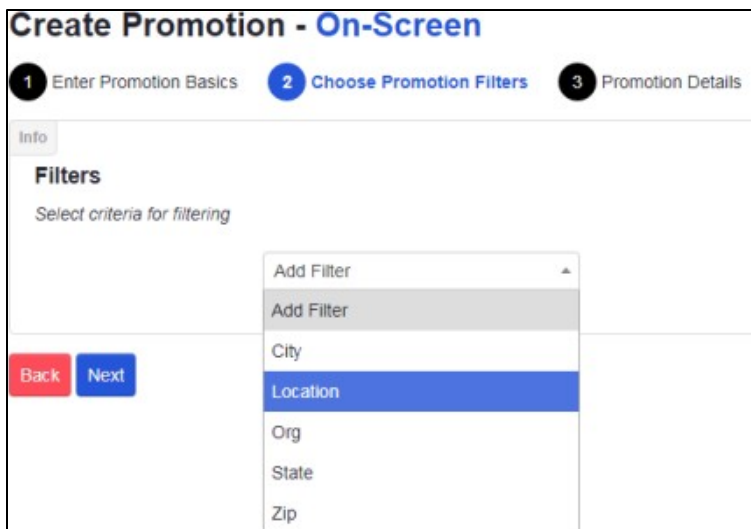
3. Select **Create New** from the top, right corner.
4. Complete the fields with basic information about the promotion.



The screenshot shows the 'Create Promotion - On-Screen' interface. At the top, there are three steps: 1. Enter Promotion Basics (active), 2. Choose Promotion Filters, and 3. Promotion Details. Below the steps is a tab labeled 'Info'. The main section is titled 'Basic Information' with the instruction 'Enter the basic promotion information'. It contains three input fields: 'Promotion Type' (a dropdown menu set to 'On-Screen'), 'Promotion Name' (a text box containing 'Starbuck's Happy Hour!'), and 'Display Name' (a text box containing 'Starbuck's Happy Hour!'). At the bottom left are 'Cancel' and 'Next' buttons.

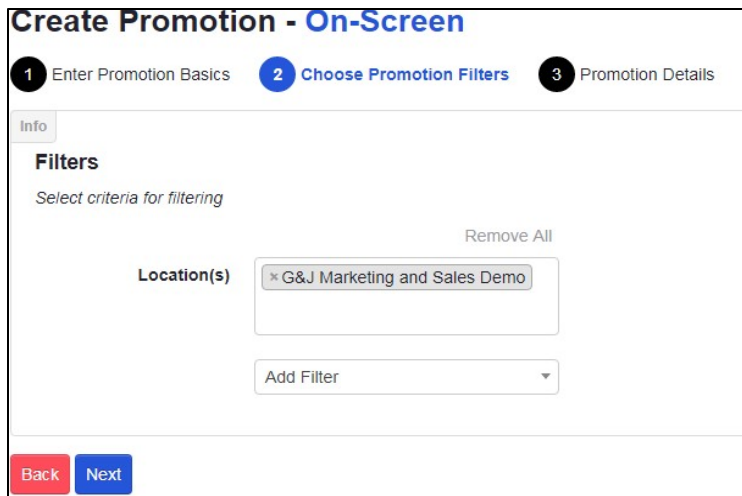
- a. **Promotion Type** – Social Feedia, mainly uses On-Screen
  - b. **Promotion Name** – Starbuck's happy hour!
  - c. **Display Name** – same as Promotion Name
5. Select **Next**.
  6. Choose which filter you would like to apply.

You can offer promotions by Location, City, State, Zip, or you can set them up at your Operator level to make them available to all of your SF locations.



The screenshot shows the 'Create Promotion - On-Screen' interface at Step 2: Choose Promotion Filters. The steps at the top are: 1. Enter Promotion Basics, 2. Choose Promotion Filters (active), and 3. Promotion Details. Below the steps is a tab labeled 'Info'. The main section is titled 'Filters' with the instruction 'Select criteria for filtering'. A dropdown menu is open, showing options: 'Add Filter', 'Add Filter', 'City', 'Location' (highlighted in blue), 'Org', 'State', and 'Zip'. At the bottom left are 'Back' and 'Next' buttons.

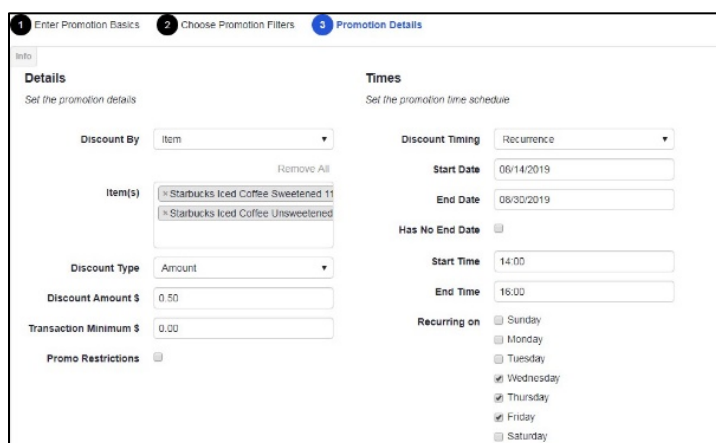
7. Choose the **location(s)**, where the promotion will run.



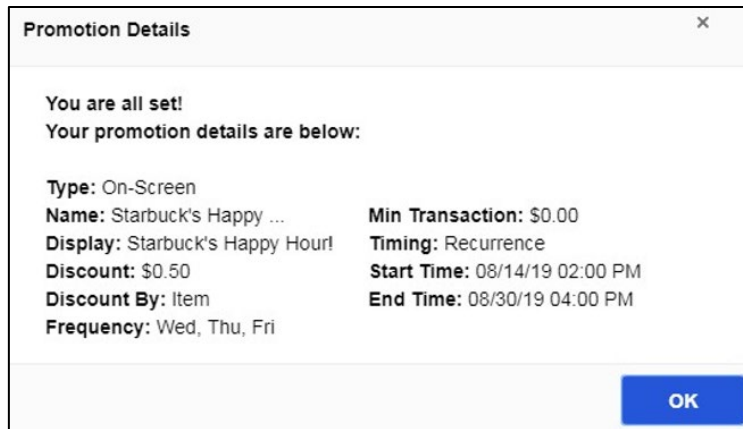
8. Select **Next**.

9. Complete the following fields to set up the details of the promotion:

- **Discount By** – Item or category
- **Item(s)** or **Category(s)** – depending on what you chose in the **Discount By** field
- **Discount Type** – by a specific amount or by a percentage
- **Discount Amount** – the amount of the discount
- **Transaction Minimum** – the minimum the consumer must buy to qualify for the discount
- **Discount Timing** – Flash Sale, Recurring, or Scheduled
- Additional fields – may display depending on what you chose in the **Discount Timing** field.



10. Click **Create** and you will get a detailed pop-up window confirming your selections.



11. Click **OK** to close the pop-up window and return to the **Promotion List** screen where you can view your new promotion.