Stock App

Instruction Manual

PepsiCo Internal Use

parlevel

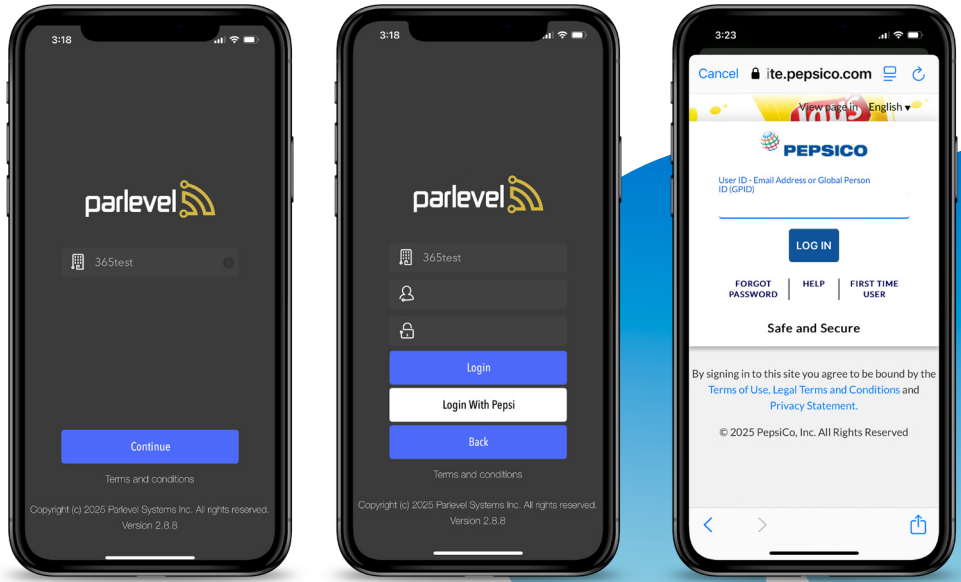
A 365 Retail Markets Company

Version 1.0

Logging in

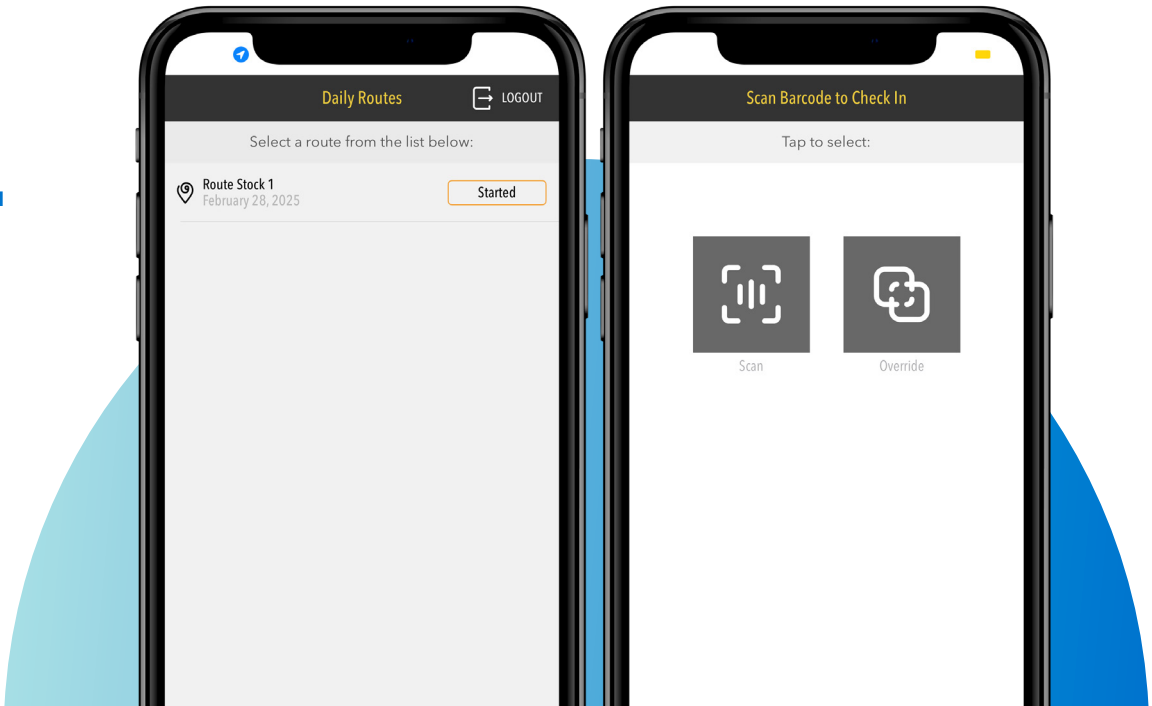
- Input organization subdomain, tap **Continue**, then tap the **Login with Pepsi** button once it appears.
- Input your *User ID-Email Address* or *Global Person ID (GPID)*, tap **Login**, input your password, tap **Verify**, then input your security answer, and tap **Verify** again.

You will automatically redirect to the *Routes* screen in the *Stock app*.



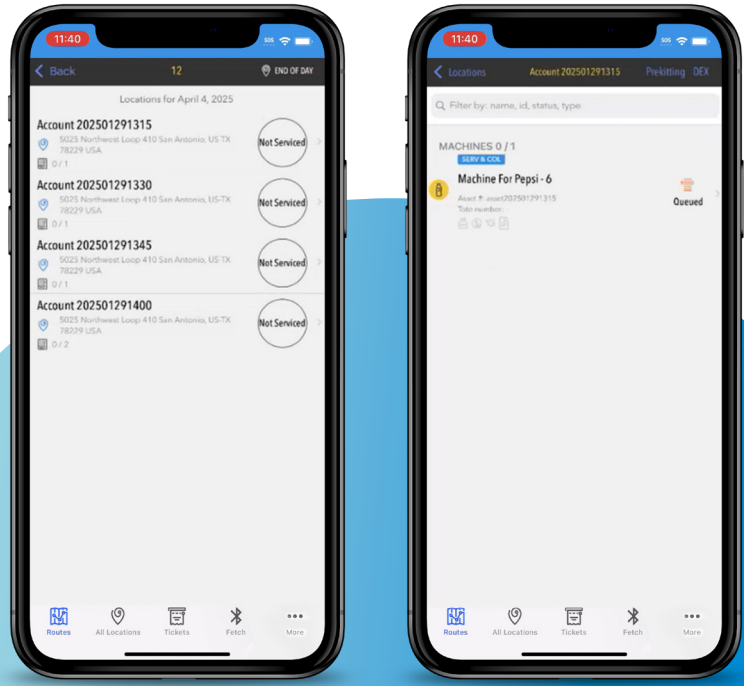
Start Route

- Tap on a route name to begin. The Gate Checkout screen will appear automatically.
- Tap **Scan** to scan the barcode, or Tap **Override** to request an override and skip the barcode scan.



Locations

After you've logged in, the **Locations Screen** will appear, where you can see the *List of Locations.* When you choose one location, you will be able to see a summary of the pre-kitting process for all locations and select the machine to perform the service.



Servicing Online Machines
Vending

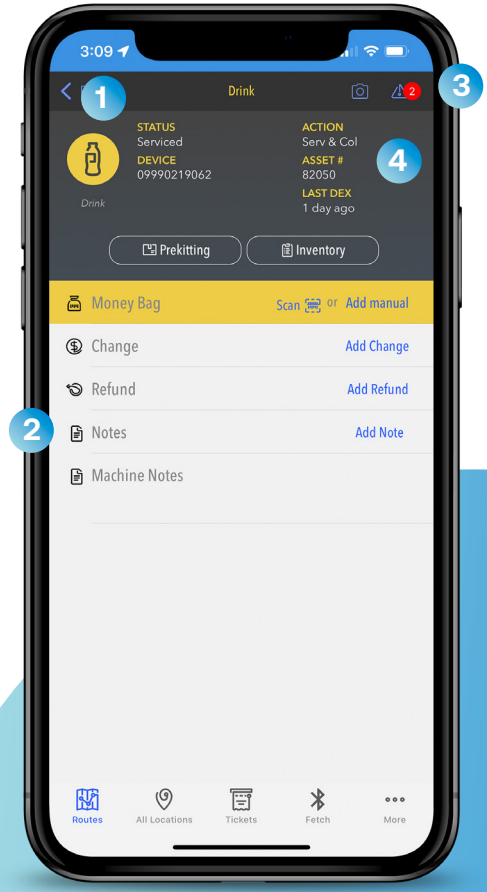
- To view or adjust items to stock, tap the **Prekitting** button beneath the machine information.
- Tap to access the *Fetch* screen, then tap **Start dexing** to initiate a Fetch DEX with Suelware (also see *Pairing Bluetooth Device* section)
- After a successful DEX upload, you will automatically redirect to the machine screen and see the *Status* change from *Queued* to In *Progress.*
    - If status does not change after 1 minute, drag downward on the app screen to manually refresh.
    - If the DEX failed to upload, the status will not change. In this case try initiating a DEX from the card reader device (if applicable), or use the **Manual PL** button to mark the machine as serviced (**Manual PL should only be done as a last resort** as it can lead to inventory inaccuracy; it is not an equivalent to a DEX using Fetch/Suelware or fill-DEX from the card reader).
- After *Status* changes to *In Progress*, the **Manual PL** button changes into the **Inventory** button.
- Scan or manually input the money bag number for the *Money Bag* field, then input the amount of change used to refill the coin mech in the *Add Change* field, and input the total amount of refunds issued to the account during servic e in the *Add Refund* field.
    - Money Bag, Change, and Refund input can happen before or after performing a DEX.

1. *Status* indicates if the machine has been serviced. *Device ID* is the serial number of the credit card reader / telemeter that is also visible in the VMS.

2. Tap to add or view *Machine Notes*.

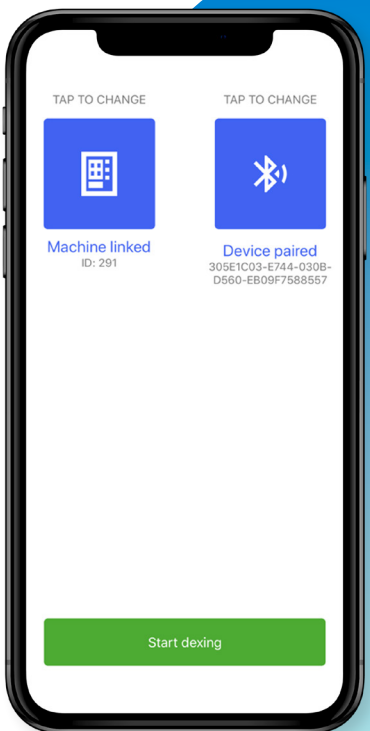
3. Tap the *Camera* icon to take a picture during the service. Tap the *Alerts* icon to view any machine breakdown alerts.

4. Indicates the intended service action for the machine, the associated asset number, and the date of when the last DEX was received.



Dexing Machines Using Bluetooth Device

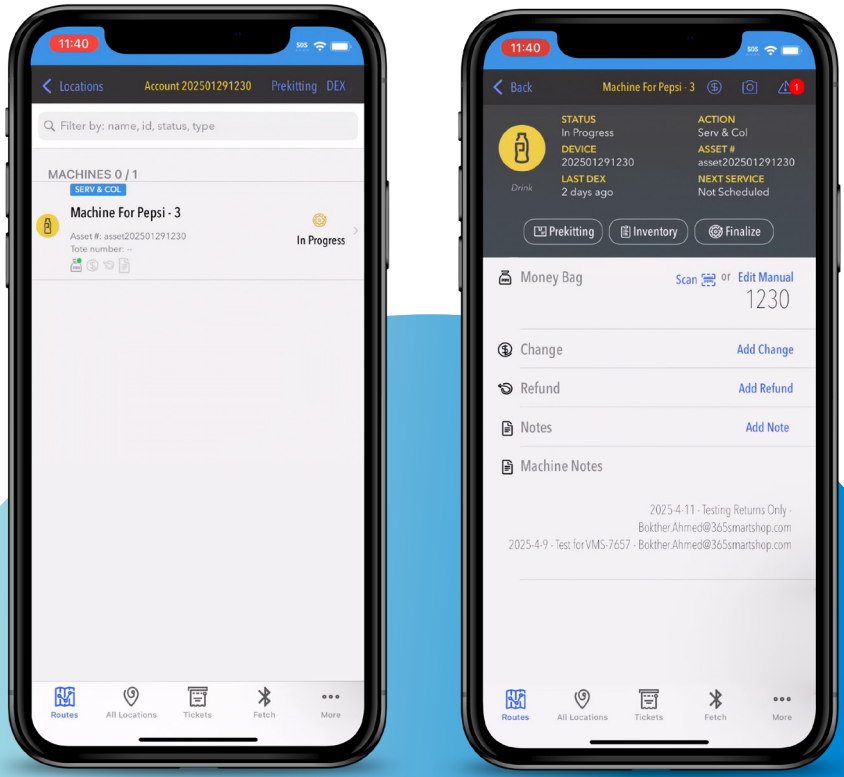
- *Plug the Suleware device into the DEX port on the vending machine, then turn it on and wait for its status light to flash blue indicating it is ready to pair.
- On the Stock app, tap **Fetch** in the lower right corner.
- Tap on the right to pair with the Suleware device (pairing is only required on the first time).
- Tap the QR code button and then scan the unique QR code for the machine.
- Tap the green **Start dexing** button and wait for a notification of a successful DEX.
  - If you are notified that the DEX failed, it will send once an adequate cell signal is available.
- After a successful DEX, back out to the *Location* screen to confirm the machine is marked as serviced, then continue servicing the machine as normal.



***Context:** Connecting/disconnecting DEX cables when the machine is powered on can produce electrical arcs from the port to cable (safety concern); If the machine detects static charge on the DEX line, it can stop communicating via DEX until the next machine power cycle (if that happened, the Suelware DEX would fail until machine communication resumed).

Online Dex Service

After dexing an online capable machine, the machine status shows "In Progress" and displays a Finalize button.

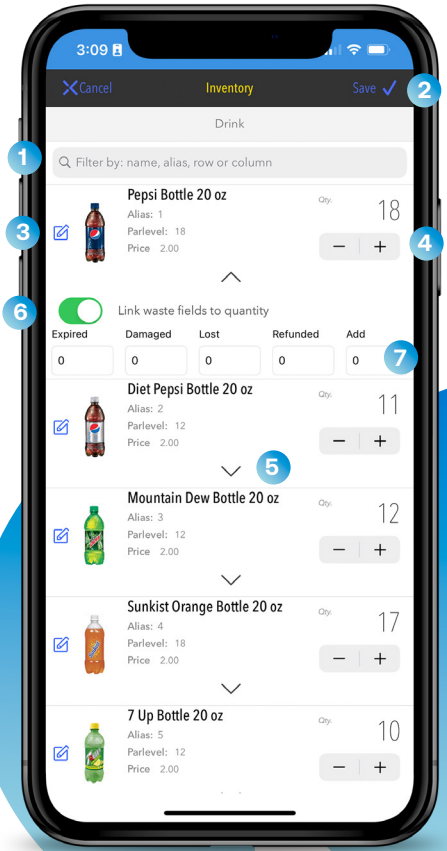


Adjusting Inventory

After servicing an online machine, the **Inventory** button provides a way to record waste or adjust the ending inventory.

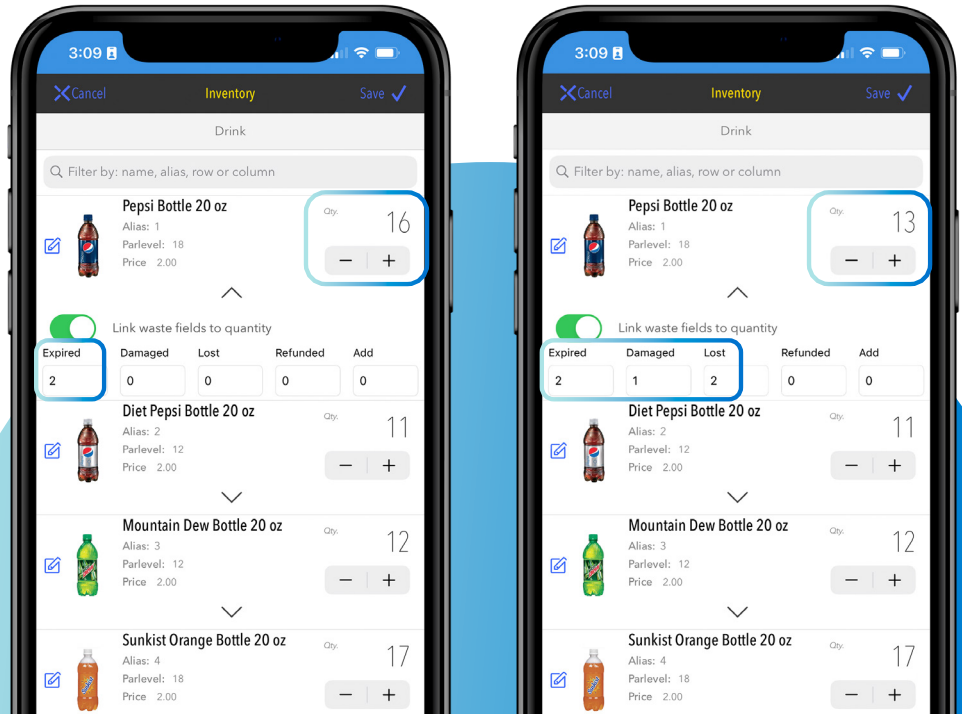
- Search for products by using the *Filter By* bar.
- Tap ✎ to swap the product or change the par level.
- Tap − | + to adjust the final product count.
- Tap ⌄ on any product to expand specific waste fields.
- Tap *Save* to confirm your inventory changes.

1. Filter products.
2. *Save* to confirm inventory changes.
3. Edit products.
4. Decrease / increase actual quantity in machine Shrinkage.
5. Expand to input adjustment reasons.
6. Toggle linking waste fields to quantity (on by default).
7. Record specific reasons for shrinkage in waste fields.



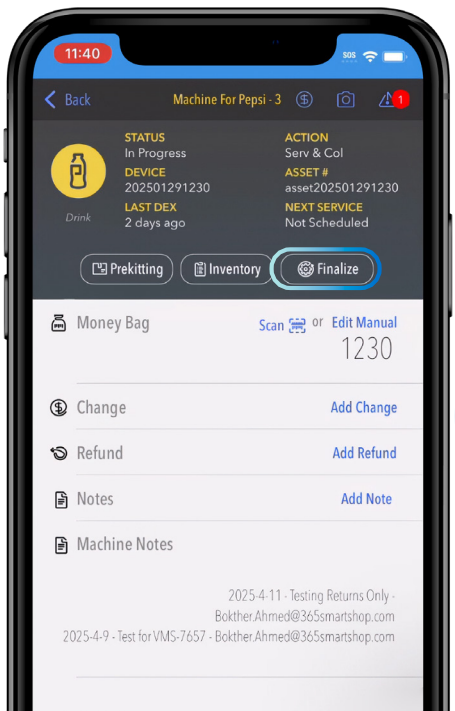
Recording Shrinkage

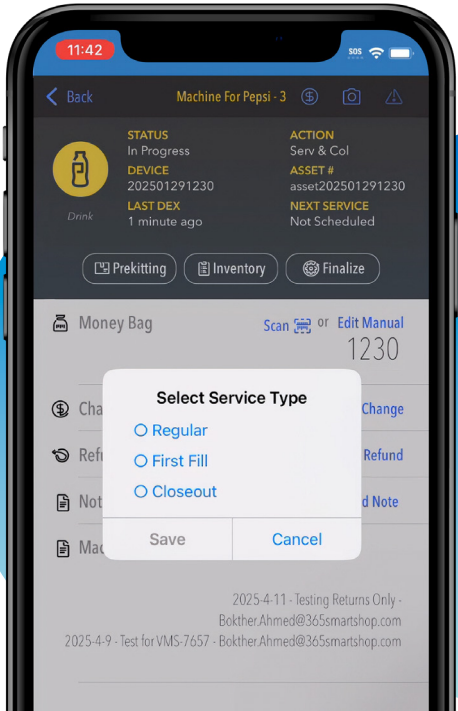
In the example below, waste fields and Quantity (Qty.) are linked. Increasing or decreasing Qty. with the − + buttons also add values to the *Lost* and *Add* waste fields, respectively. Additionally, adjusting values in the waste fields decrease Qty. (except for the *Add* field, which increases it). If you *toggle off Link waste fields to quantity*, then − + buttons will still adjust Qty. but no longer be reflected in the *Lost* and *Add* waste fields, nor will edits to any waste fields be reflected on the item Qty.



Completing Service

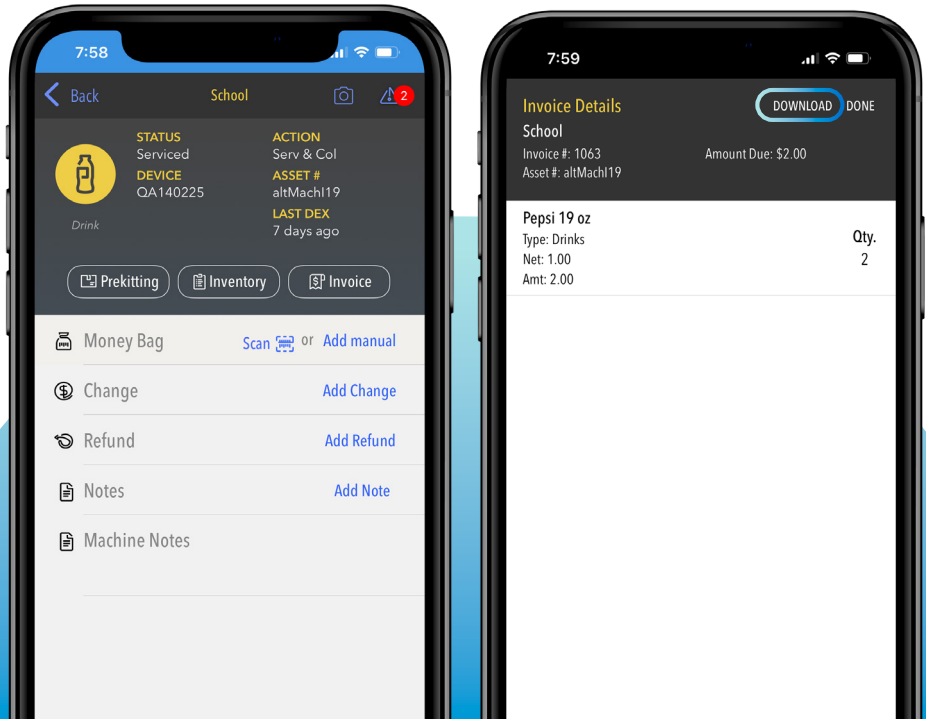
- After adjusting inventory, tap **Finalize**.
- On the *Select Service Type* popup that appears, select an appropriate type *(Regular, First Fill, or Closeout)*, then tap **Save**.
- The machine *Status* will change from *In Progress to Pending Response* and, after a few moments, then change to *Serviced*.





Invoice Generation

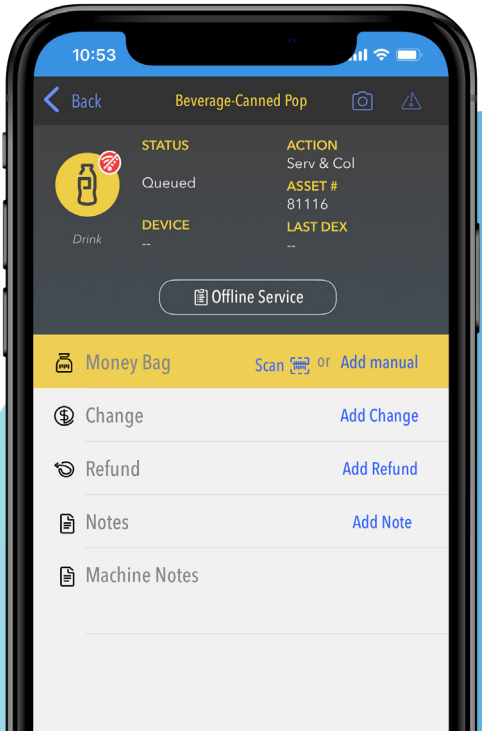
Once the machine *Status* is *Serviced*, tap **Invoice** to generate the service invoice, then tap **Download** (top right corner) to access the printable version.



Offline Machines

An offline machine lacks a *Device ID* and the **Manual PL** button. Initially, there will only be an **Offline Service** button. The **Prekitting** button will appear after 3 services are completed (the VMS will then prekit based on the average amount of inventory that was stocked from each of the last 3 services).

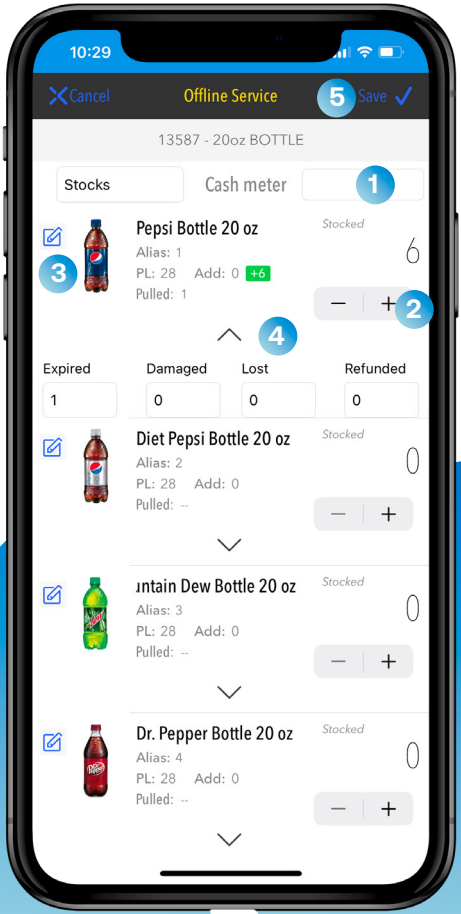
- Open the Machine.
- Scan or manually input the money bag number for the *Money Bag* field, then input the amount of change used to refill the coin mech for the *Add Change* field, and input the total amount of refunds issued to the account during service for the *Add Refund* field.



- Tap **Offline Service**

1. If using meters for offline consolidation, input the machine meter number exactly as it appears.
2. Use − | + to enter the number of units stocked for each product.
3. Tap to change a product, adjust its par level, or perform a manual count (also see the *Manual Count Feature* section).
4. Tap ﹀ to input shrinkage values into the waste fields; if unsure of which field to use, use *Lost*.
5. Tap *Save* to save changes.

***Note**: Accuracy when inputting inventory values is important because they form the basis for calculating Daily Consumption Rate (DCR) which determines prekitting for this machine after 3 services.*

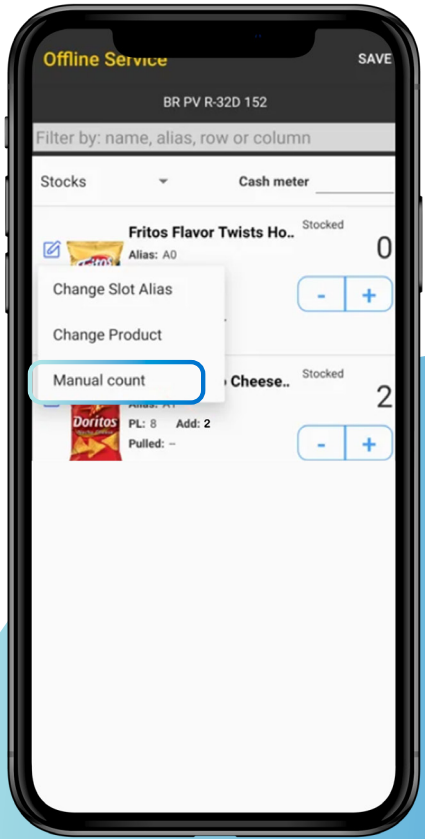


Manual Counts

The *Manual count option* is available during an offline service by tapping on a product. Manually recording product inventory can improve forecast calculations and the accuracy of future prekitting for an offline machine.

- Tap for a product, tap **Manual count,** then enter the actual quantity of stocked product in the machine.
- If *Manual Count* is listed beneath the − + buttons, it means it is indicated for that product on the service.

***Note**: *Manual Count is optional.*

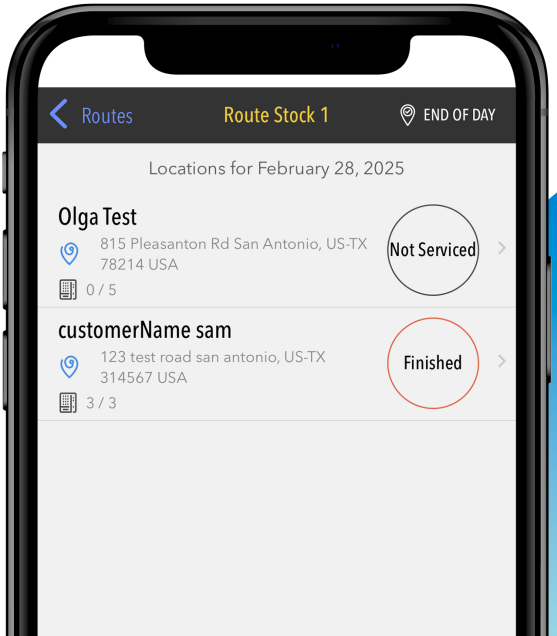


Route Completion

The route becomes locked upon completion and cannot be accessed again. Drivers should click on the location they wish to service by selecting one labeled *Not Serviced.*

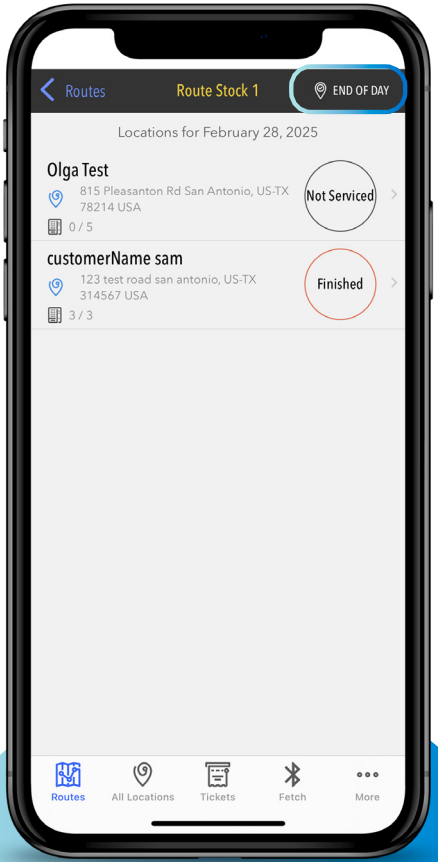
They will then see their assigned machines for that location.

***Note:** Drivers cannot complete end-of-day if any machines are "In Progress"; all must be Pending or Serviced.



End of Day Process

After completing **at least one service** and returning to the warehouse, the Driver can initiate the *End of Day process* while viewing route locations. An **EOD Checker** is required to login.



Driver:

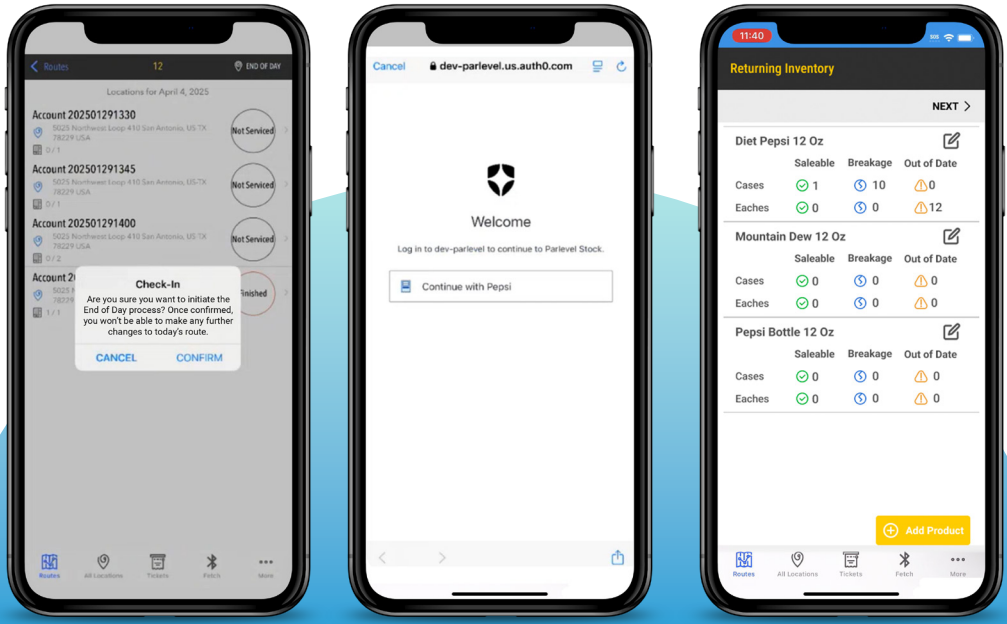
- Tap END OF DAY; a Check-In message appears alerting the Driver that no further changes can be made once confirmed.
- Tap **Confirm**, then hand the mobile device to the EOD Checker.

EOD Checker:

- On the Pepsi login screen, input your *User ID-Email Address or Global Person ID (GPID),* tap **Login,** input your password, tap **Verify,** then input your security answer, tap **Verify** again, then wait to authenticate.

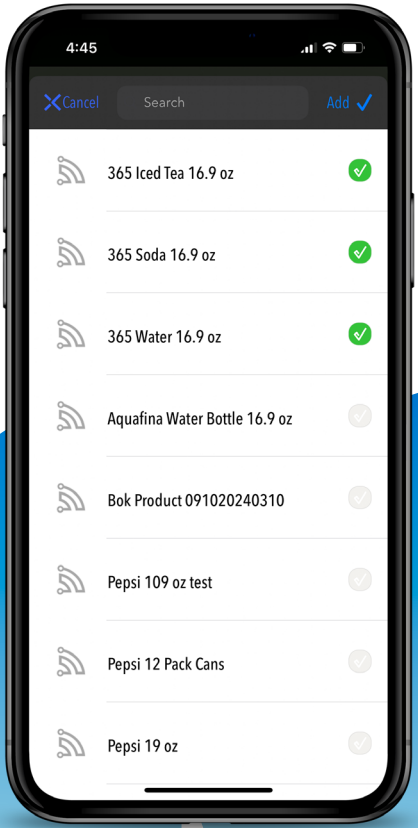
EOD Checker Transition

When you click **End of Day**, you'll see a confirmation. *Once you start this process, you won't be able to make changes to the route.* When you confirm End of Day, you will be asked to log in with your Pepsi credentials. When you have finished the authentication process, you will see the **Returning Inventory screen.**



Inventory Validation (Checker)

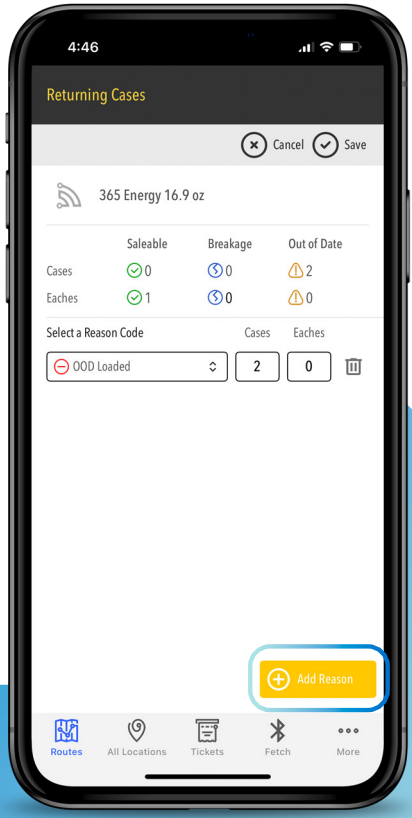
The **EOD Checker** makes sure the truck inventory matches the inventory listed in the system. Discrepancies are adjusted by adding or editing products with appropriate reason codes.



Adding Products

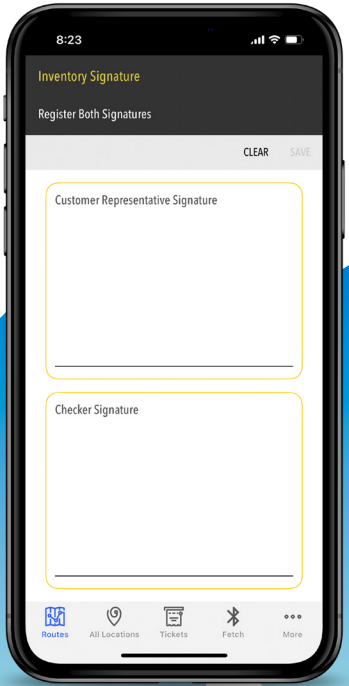
When truck inventory is not listed in the system, the **EOD Checker** adds those products and their quantities.

- Tap **Add Product**, select the product(s), then tap **Add ✓.**
- Tap **Add Reason**, select a *Reason Code:*
  - *Saleable* (product still sellable)
  - *Out of Date* (product expired)
  - *Breakage* (product damaged)
- **Input number of *Cases* and *Eaches*.**
- **Tap Save when finished.**



EOD Checker Inventory Sign Off

- Tap **Next** ❯, moves to Summary screen.
- Tap **Download** (top right corner) to view or print the *Returning Inventory* PDF.
- Tap Confirm ❯, then tap **YES** on the *Confirmation* alert message for the *Inventory Signature* screen to appear.
- Both Driver and EOD Checker must sign this screen.
- Tap **Save** for the Check-In screen to appear.
- Tap **Scan** to scan a barcode, or tap **Override** to request an override and bypass the barcode scan.
- Tap **Yes.**
- On the Pepsi login screen, input your *User ID-Email Address* or *Global Person ID (GPID)*, tap **Login**, input your password, tap **Verify**, then input your security answer, tap **Verify** again, then wait to authenticate.



Route Reconciliation

The **EOD Checker** and Driver begin *Route Reconciliation* after validating *Returning Inventory.*

Machines Not Serviced

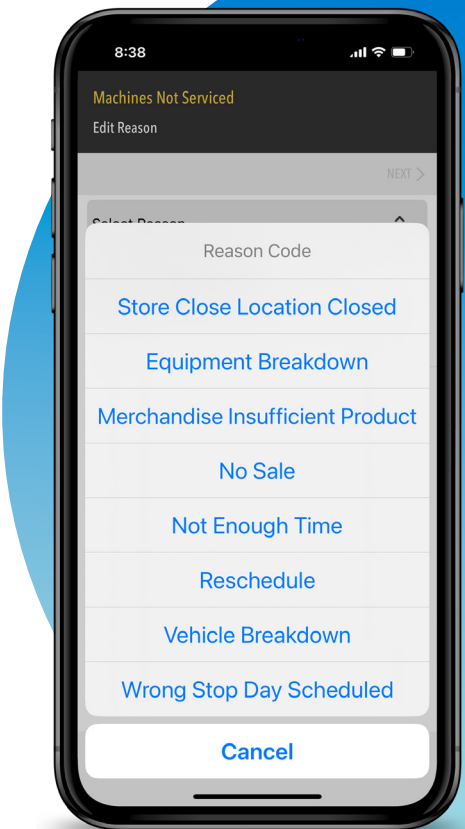
- Tap **Select Reason** for each machine listed, then select a *Reason Code* for why service was not completed.
- Tap **Next** >.

Machine Sales Summary

- Review cash and cashless sales data for serviced machines.
- Tap **Next** >.

Stocked Product Summary

- Review stocked product names, volumes, prices, and sales.
- Tap **Next** >.



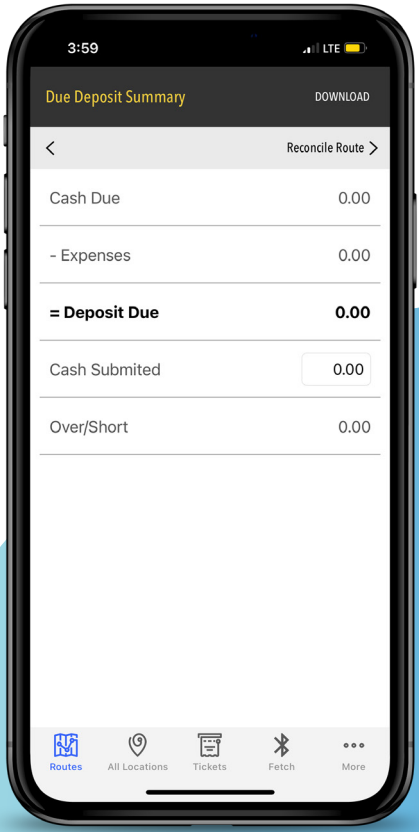
Sales and Deposit Summary

Due Deposit Summary

For the *Due Deposit Summary*, the Driver must submit a cash deposit number.

- **Review deposit amounts.**
- **Input the *Cash Submitted* value.**
- **Tap Download (top right corner) to print the *Due Deposit Summary* PDF.**
- **Tap Reconcile Route >, then tap YES on the alert message to save changes and proceed.**
- **EOD Checker.**

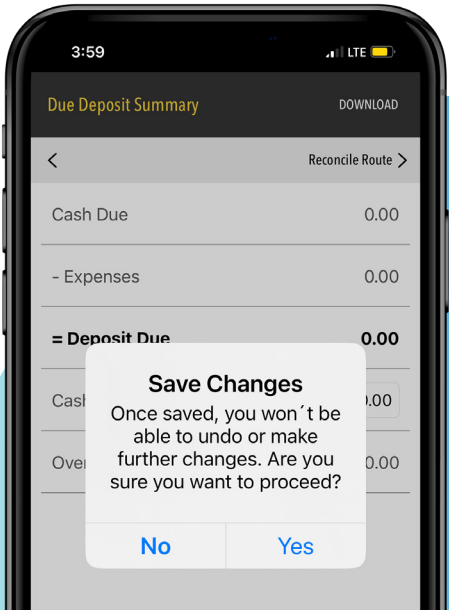
Printing the *Due Deposit Summary* PDF is required.

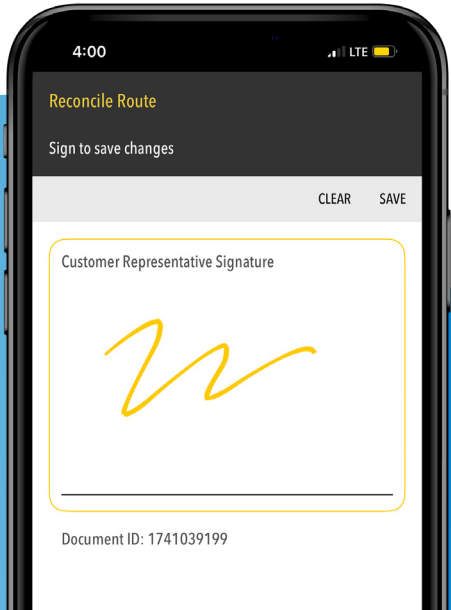


The PDF version of the Due Deposit Summary can be downloaded by clicking Download in the top right corner.

Pepsi requires that this report is printed and turned in every single day.

Once the Summary has been downloaded the driver will receive a message prompt to save their changes. This prompt will inform the driver that once they save they cannot make further changes. The driver will tap Confirm and then they are prompted to sign.





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