VendInventory

Getting Started Guide

Everything a new operator needs: products, locations, machines, card readers, trips, the driver app, the warehouse and reports.

For new operators · English · Each chapter has a short video with the same steps.

Contents

1	Getting started	Video: 01-getting-started.mp4
2	Products	Video: 02-products.mp4
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★	Every day, every week	

The screenshots come from a sample company, Maple Vending Co, so every name and figure in them is made up. The orange frame shows where to look. Every chapter has a matching video of a few minutes; watch the video for the tour, and keep this guide for the details.

Setting up, in ten steps

Tick these off in order the first time. Each step points to the chapter that explains it.

- [ ] **Create your account**
  Register, check your time zone and currency. Chapter 1
- [ ] **Add your products**
  One by one, from a spreadsheet, or from the general product list. Chapter 2
- [ ] **Add your locations**
  Name, code and full address. Chapter 3
- [ ] **Add your machines**
  Code, name, card reader and its Telemetry ID. Chapter 3
- [ ] **Install each machine at its location**
  On the location's page: Install machine. Chapter 3
- [ ] **Set the planograms**
  Which product is in which column, capacity and price. Chapter 3
- [ ] **Connect your card readers**
  Cantaloupe receiving address and/or Nayax keys. Chapter 4
- [ ] **Add your drivers and give them the app**
  Users and access, then Driver app for phones. Chapter 5
- [ ] **Plan the first trip**
  From the Priority list or Trips, Create trip. Chapter 5
- [ ] **Set up the warehouse, reports and alerts**
  Receive stock, count it, and turn on alerts. Chapter 6

CHAPTER 1

Getting started

Create your account, find your way around, and see what your plan includes.

▶ Video: 01-getting-started.mp4

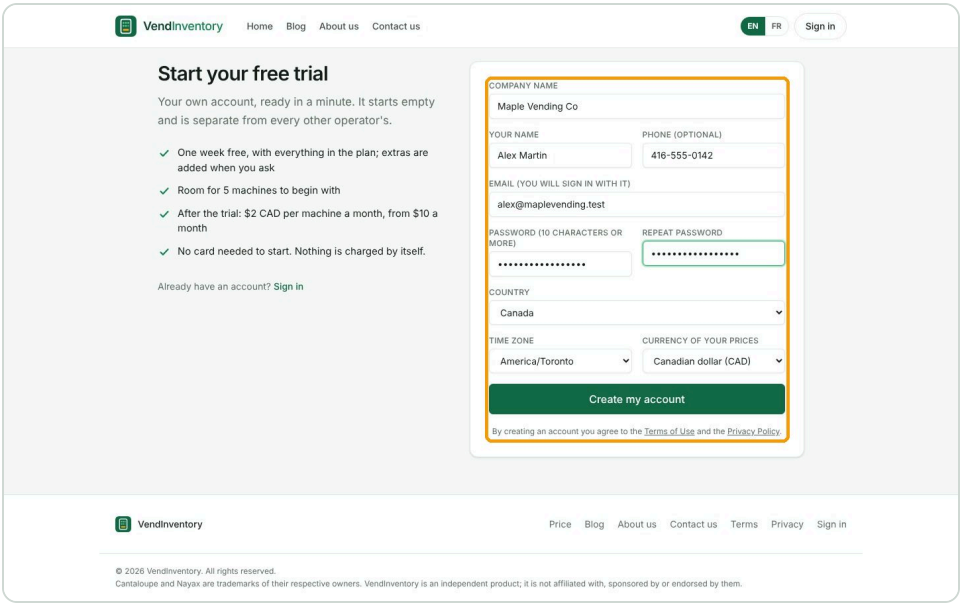
1.1 Create your account

Go to vendinventory.com and choose Start your free trial (the Register page).

Fill in: Company name, Your name, Phone (optional), Email (you sign in with it), a Password of 10 characters or more (twice), Country, Time zone and the Currency of your prices.

Press Create my account. Your account is ready at once, separate from every other operator's. The free trial needs no card and nothing is charged by itself.

Tip The time zone decides what "today" means in every screen and report, so pick the one where your machines are.



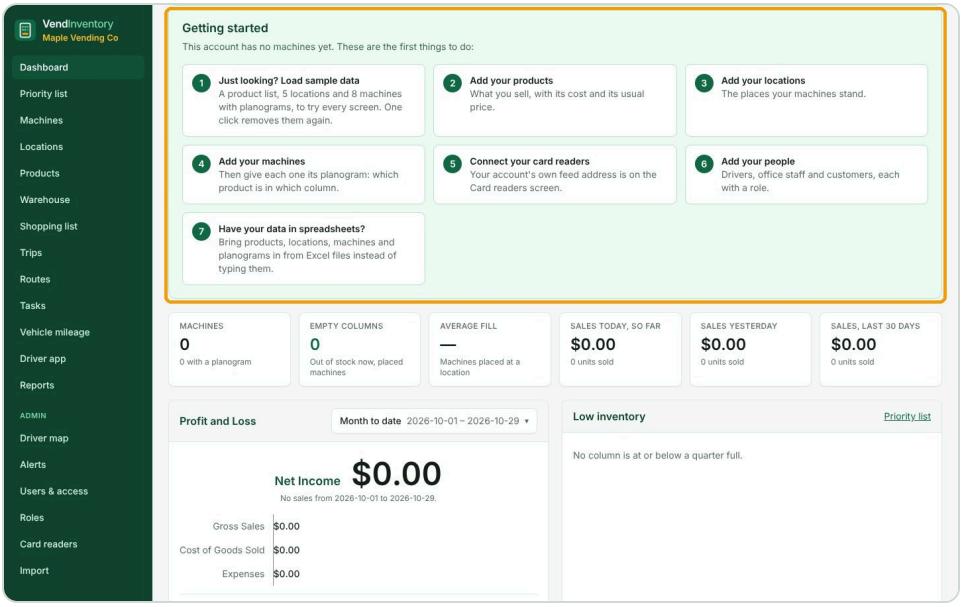
Register: company, your name, email, password, country, time zone, currency

1.2 The Getting started list

After signing up you land on the Dashboard. While the account has no machines, a Getting started box lists the first things to do, in order:

1. Load sample data (optional: a product list, 5 locations and 8 machines to try every screen; one click removes them again).

2. Add your products. 3. Add your locations. 4. Add your machines and their planograms. 5. Connect your card readers. 6. Add your people. 7. Or bring everything in from spreadsheets.

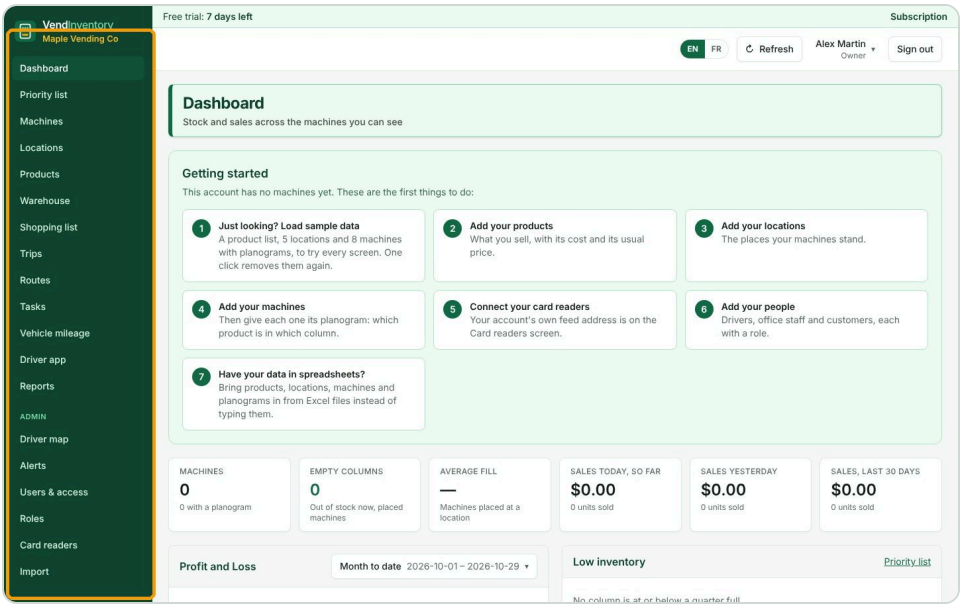


The Dashboard lists the first things to do, in order

1.3 The menu

The menu on the left holds every screen: Dashboard, Priority list, Machines, Locations, Products, Warehouse, Shopping list, Trips, Routes, Tasks, Vehicle mileage, Driver app and Reports.

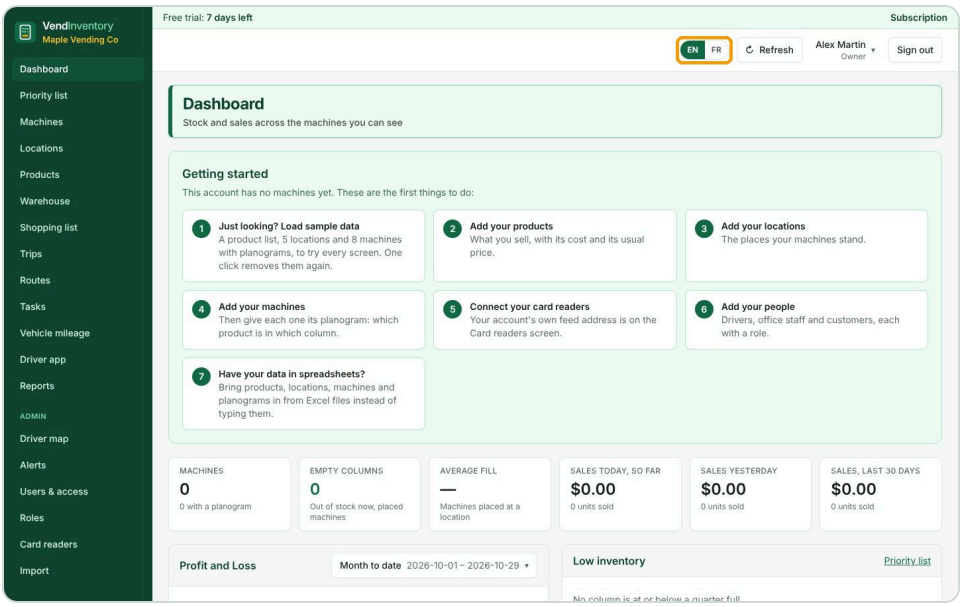
Under Admin: Driver map, Alerts, Users & access, Roles, Card readers and Import. People only see the screens their role allows.



The menu on the left: every screen of the system

1.4 English or French

EN | FR at the top switches every screen between English and French. The choice is remembered for each person; reports, Excel and PDF files, emails and the driver app follow it.



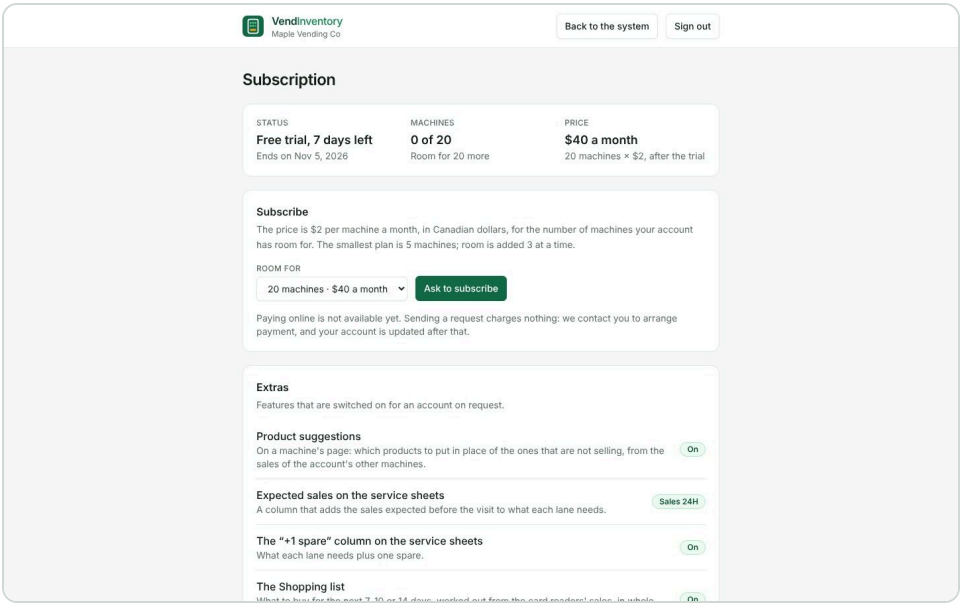
EN | FR switches the whole system to French

1.5 Your subscription and extras

Open Subscription (top right). It shows the status of your trial, how many machines your account has room for and the monthly price per machine.

To add room for more machines, choose the size and press Ask to subscribe; you are contacted to arrange payment.

Extras are features switched on per account on request: product suggestions, expected sales on the service sheets, the Shopping list, ready-made column maps, live driver location, the Trip times report, company settings and more. Press Ask for it next to one you want.



Subscription: your trial, your machine places, and the extras

CHAPTER 2

Products

Everything you sell, with its cost and its usual price.

▶ Video: 02-products.mp4

2.1 Add a product

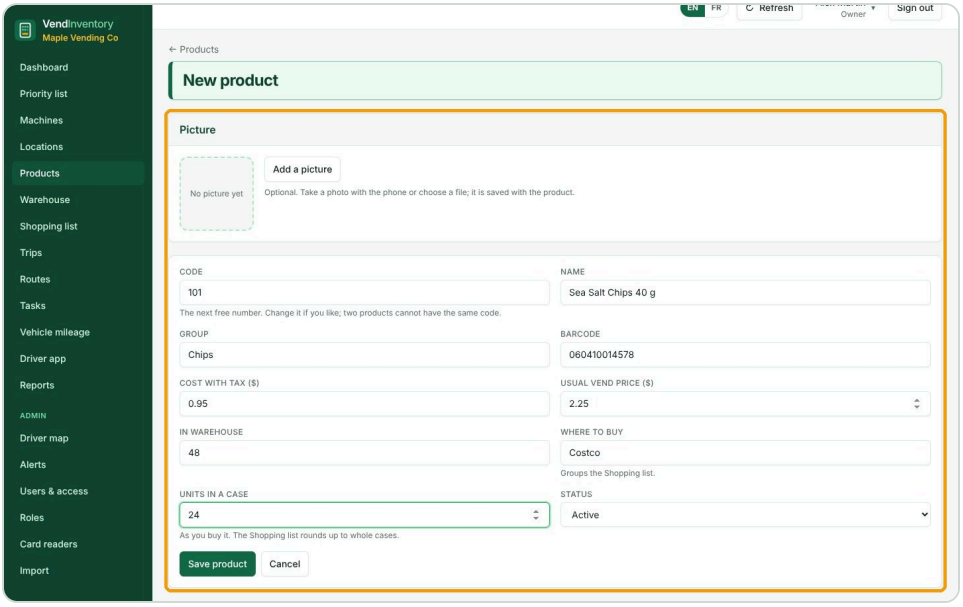
Open Products and press New product.

Code: the next free number is filled in; two products cannot share a code. Name, and Group (Chips, Chocolate, Drinks...).

Barcode: lets drivers find the product by scanning it. Cost with tax and Usual vend price: used for profit in the reports.

In warehouse: how many you have now. Where to buy and Units in a case: the Shopping list groups by store and rounds up to whole cases.

Add a picture (a photo from the phone or a file), then press Save product.



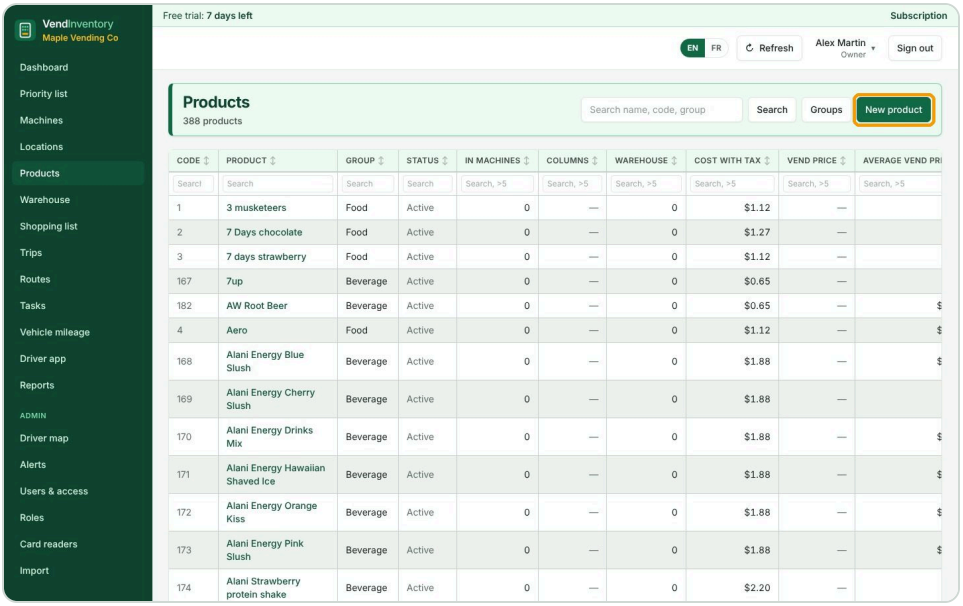
Products → New product: code, name, group, cost, price, case size

2.2 The product list

The Products list shows every product with its group, status, machines, cost, vend prices and warehouse stock.

Search at the top, click a heading to sort, or type in the small boxes under the headings to filter (for example >5).

Groups (top right) renames or merges product groups for the whole account.

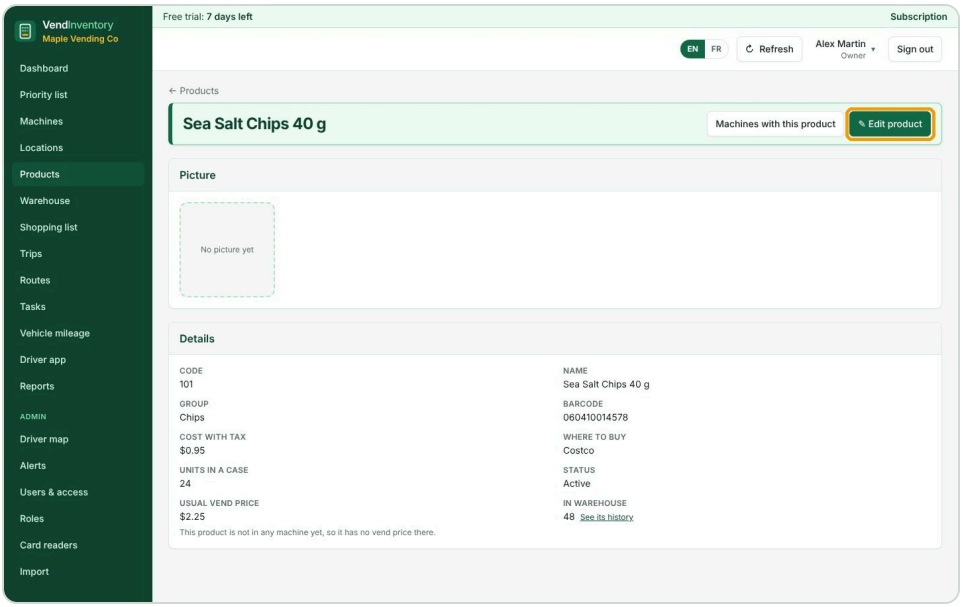


Search, sort and filter every product

2.3 A product's page

Clicking a product opens its page read-only, with the real vend prices it has in your machines and its warehouse history.

Press ✎ Edit product to change anything (or its picture), then Save product. Cancel leaves it as it was. A product that is in no machine can be deleted from the edit screen.



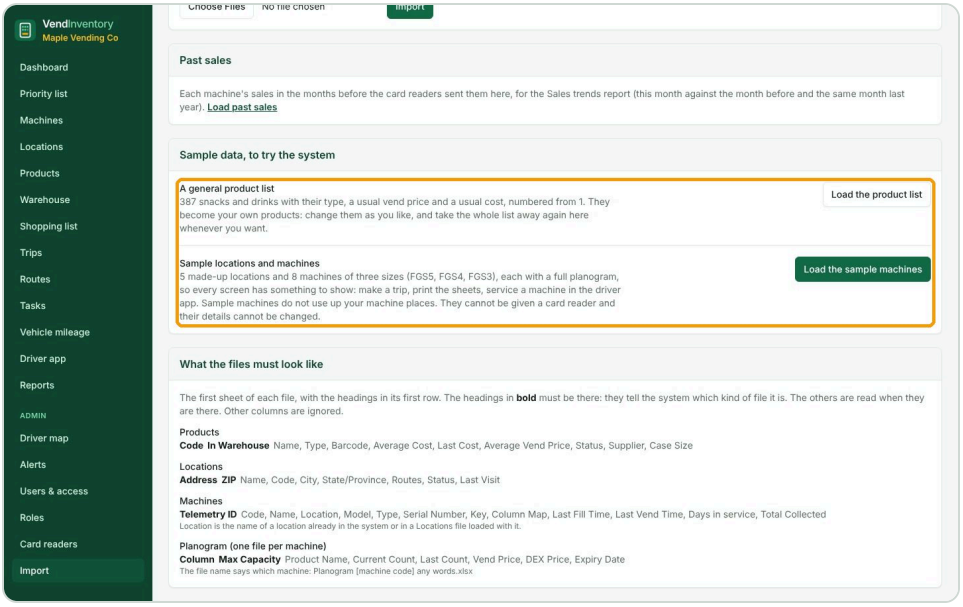
A product opens read-only: press Edit product to change it

2.4 Import from spreadsheets, or start from a list

Import (under Admin) reads Excel files of products, locations, machines and planograms, whatever the order you choose them in. Importing again updates records instead of duplicating them. The screen lists the headings each file needs.

Load the product list adds a general list of common snacks and drinks with a usual price and cost; it becomes your own and can be removed again.

Load the sample machines adds 5 sample locations and 8 sample machines to try every screen; Remove the samples takes them away.



Import: bring products, locations, machines and planograms from Excel

CHAPTER 3

Locations and machines

Where your machines stand, the machines themselves, and what is in each column.

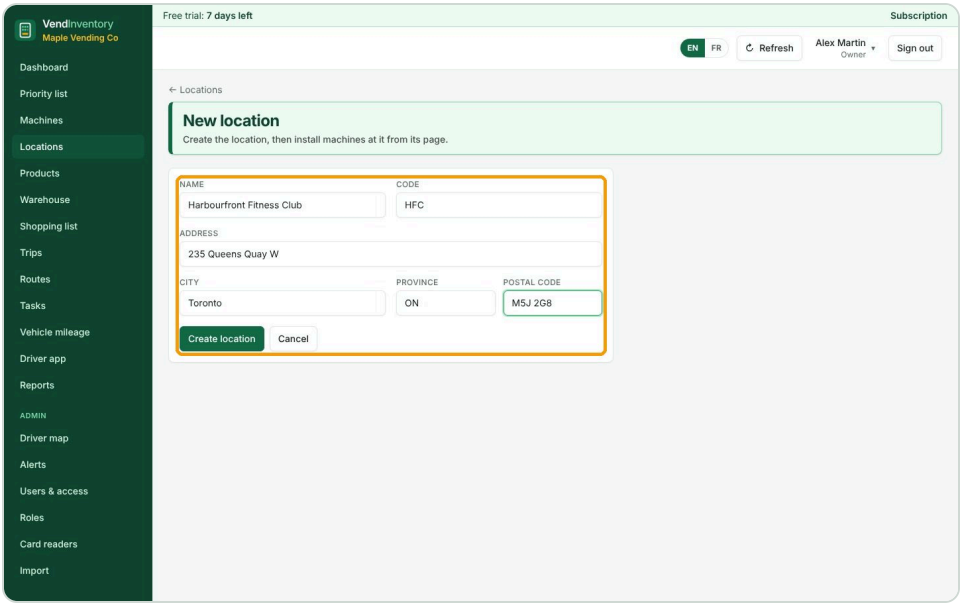
▶ Video: 03-locations-and-machines.mp4

3.1 Add a location

Open Locations and press New location.

Name, Code (short, optional), Address, City, Province and Postal code. The address puts the location on the map, gives drivers the Navigate button and lets trip distances be measured.

Press Create location.

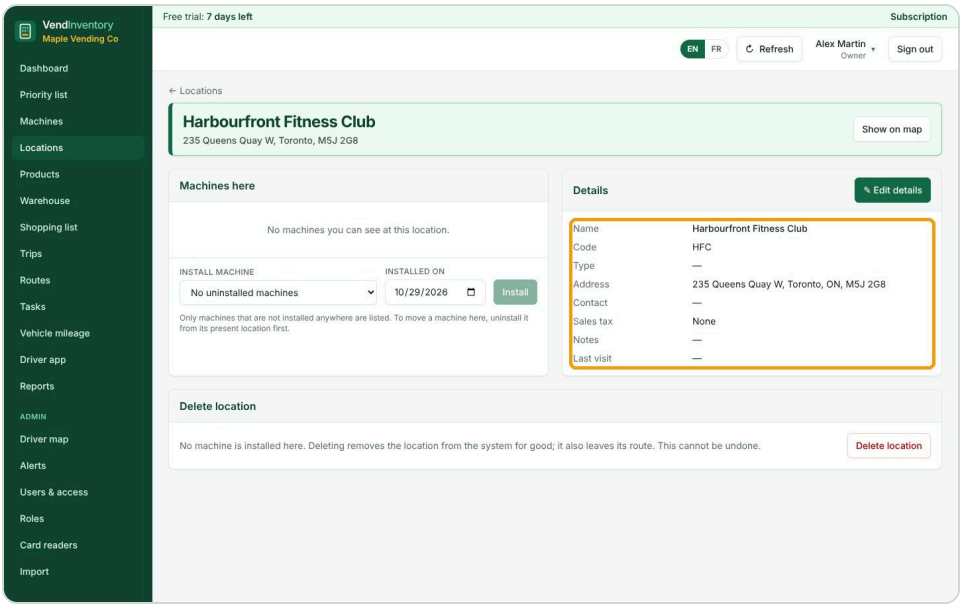


Locations → New location: name, code and address

3.2 The location's page

The page shows the machines installed there and the Details (read-only).

Press ✎ Edit details to add the contact, phone, sales tax %, location type and notes; Save location. Show on map opens the location on the map, where its pin can be moved.



Details are read-only; Edit details adds contact, tax and notes

3.3 Add a machine

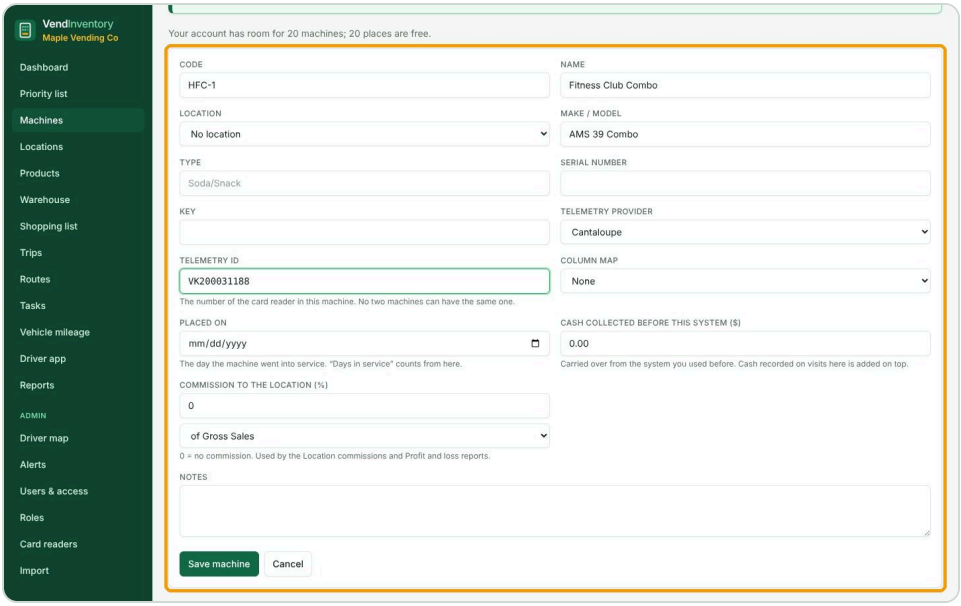
Open Machines and press New machine.

Code and Name; Make / model, type, serial number and key.

Telemetry provider (Nayax or Cantaloupe, or let the system work it out) and Telemetry ID: the number of the card reader in this machine. For Nayax it is the 16-digit device number; for Cantaloupe the ePort serial (for example VK2...). Sales are matched to the machine by this ID.

Placed on (the day it went into service), cash collected before this system, and the commission to the location (% of gross sales or of gross profit).

Press Save machine. Your plan's number of machine places is shown at the top.

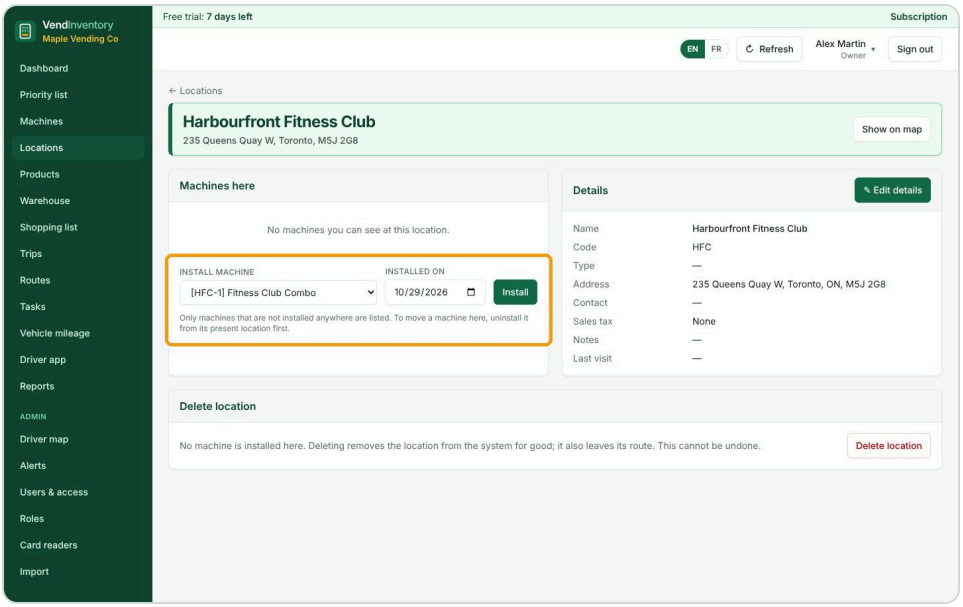


Machines → New machine: code, name, model and card reader ID

3.4 Install the machine at the location

On the location's page, under Install machine, choose the machine and the Installed on date, and press Install.

Only machines that are not installed anywhere are listed. To move a machine, Uninstall it from its present location first.



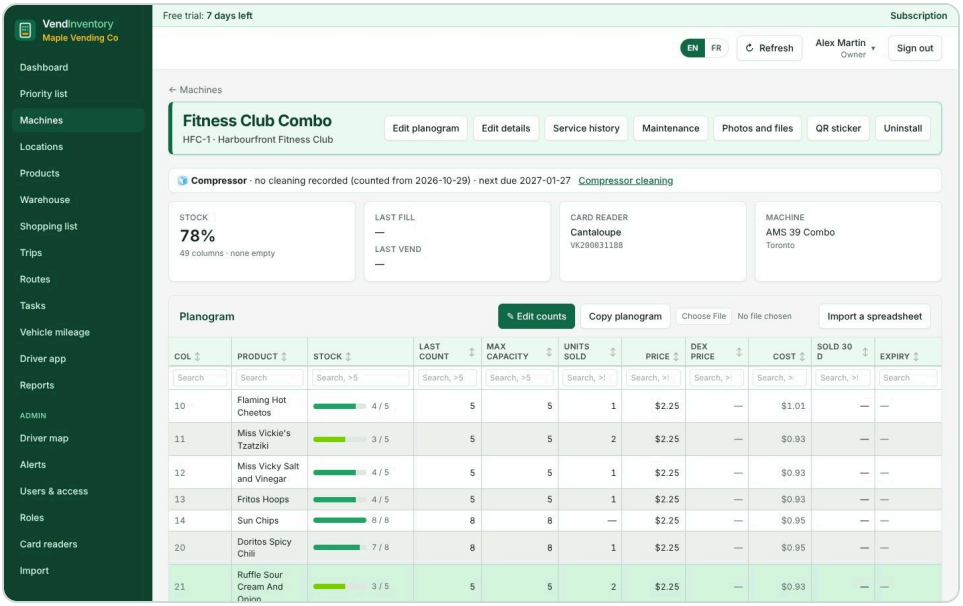
On the location's page: choose the machine, the date, and Install

3.5 The machine's page

The machine's page shows its stock (% full and empty columns), last fill, last vend and card reader status.

Below is the planogram: each column with product, stock, last count, max capacity, units sold, price, DEX price, cost and sales in 30 days.

Buttons at the top: Edit planogram, Edit details, Service history, Maintenance, Photos and files, QR sticker (a sticker customers scan to report a problem) and Uninstall.



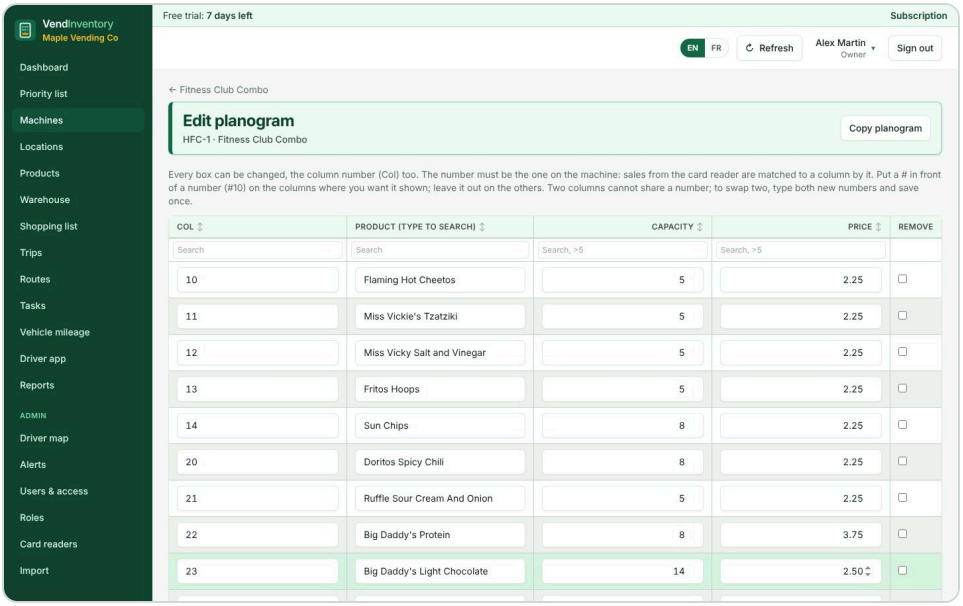
Stock, last fill, card reader and the planogram at a glance

3.6 Edit the planogram

Press Edit planogram. For each column: the column number (as on the machine's keypad), the product (type to search), the capacity and the price. Tick Remove to take a column out.

The column numbers must be the ones the card reader sends, so each sale is matched to the right product.

Copy planogram copies another machine's planogram; Import a spreadsheet reads one from Excel.



Edit planogram: which product is in which column, capacity and price

CHAPTER 4

Card readers: Cantaloupe and Nayax

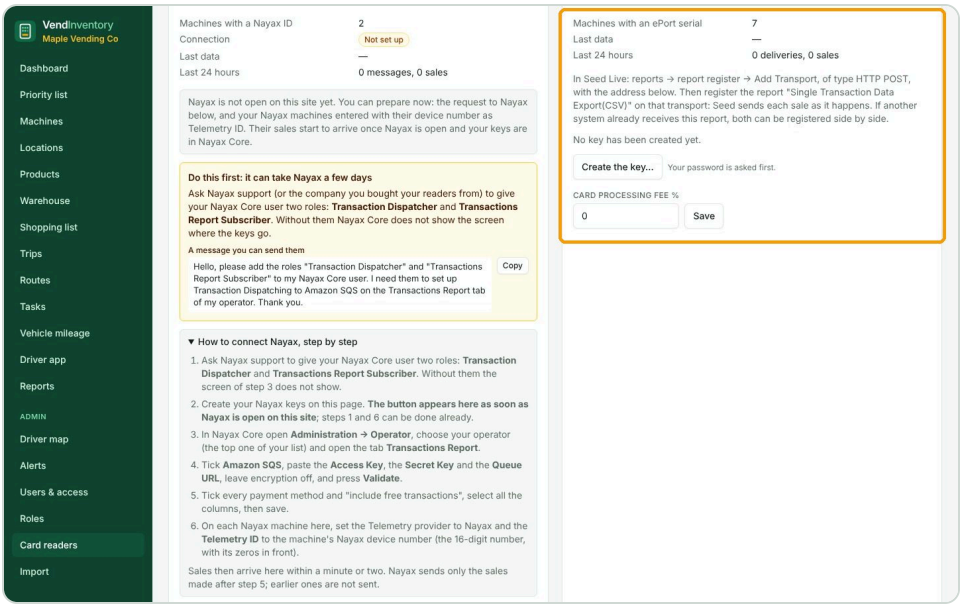
Connect your card readers so every sale, cash and card, arrives by itself.

▶ Video: 04-card-readers.mp4

4.1 The Card readers screen

Open Card readers (under Admin). One section for Nayax and one for Cantaloupe, each with the number of machines using it, the connection status, the last data received and the deliveries of the last 24 hours.

Card processing fee %: enter your card fee so the reports can show net figures.



Admin → Card readers: one section for Nayax, one for Cantaloupe

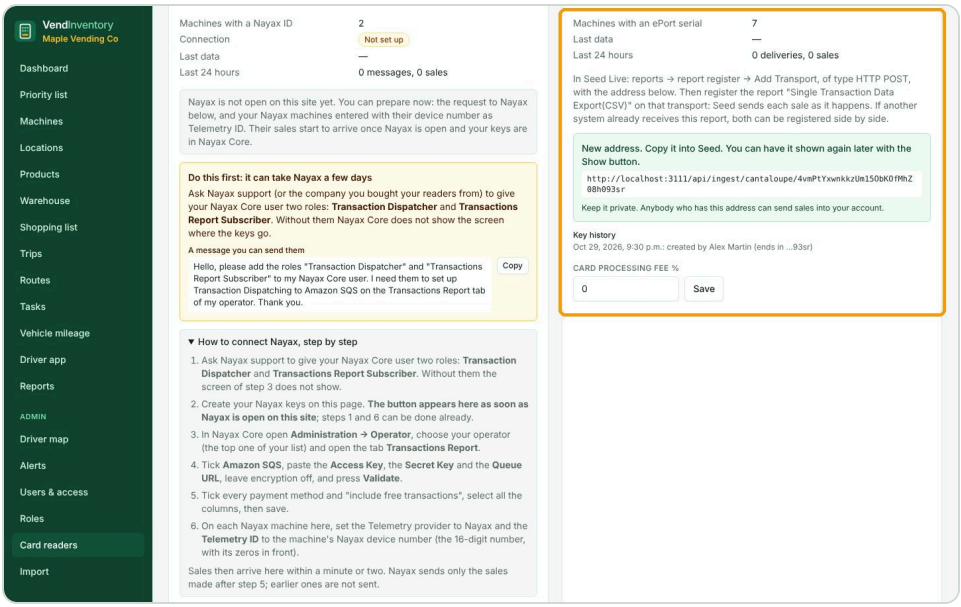
4.2 Cantaloupe: your receiving address

In the Cantaloupe section press Create the key... and confirm with your password. Your account's own receiving address is shown: copy it into Seed straight away (it is shown again only with Show button, and it is private: anybody with it can send sales).

In Cantaloupe Seed Live: Reports → Report Register → Add Transport, type HTTP POST, with that address.

Then register the report "Single Transaction Data Export (CSV)" on that transport. Seed sends each sale as it happens. If another system already receives this report, both can be registered side by side.

Each Cantaloupe machine here needs its ePort serial as Telemetry ID (next step).

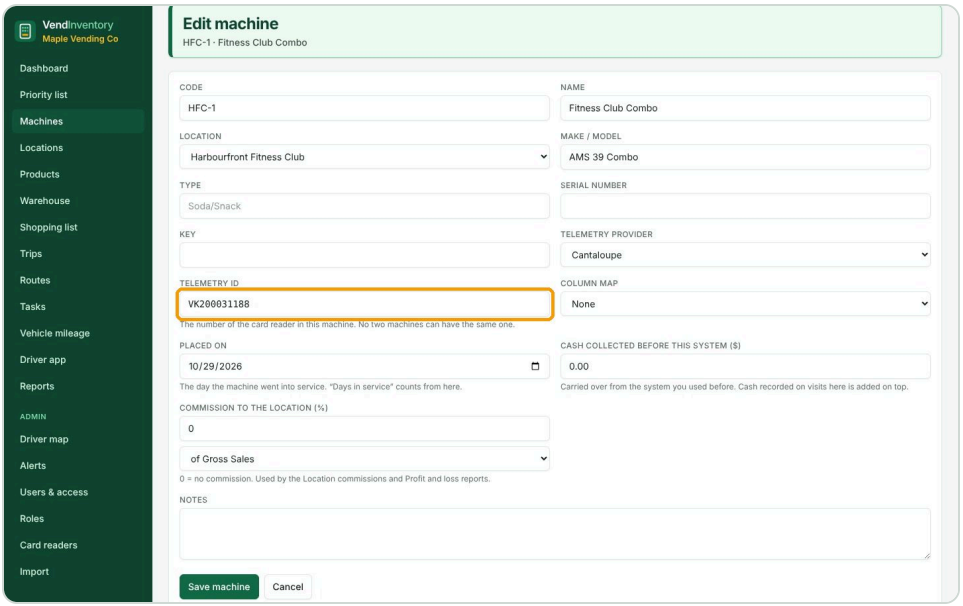


Create the key, then paste the address into Seed Live

4.3 Each machine's Telemetry ID

Open the machine → Edit details. Telemetry provider: Nayax or Cantaloupe. Telemetry ID: the ePort serial (Cantaloupe) or the 16-digit device number with its zeros in front (Nayax).

Sales are matched to the machine by this ID; no two machines can have the same one.



Machine → Edit details → Telemetry ID: the reader's number

4.4 Nayax, step by step

1. Ask Nayax support (or your reader supplier) to give your Nayax Core user two roles: Transaction Dispatcher and Transactions Report Subscriber. The screen has a ready message to copy. It can take Nayax a few days.

2. Create your Nayax keys on this page.

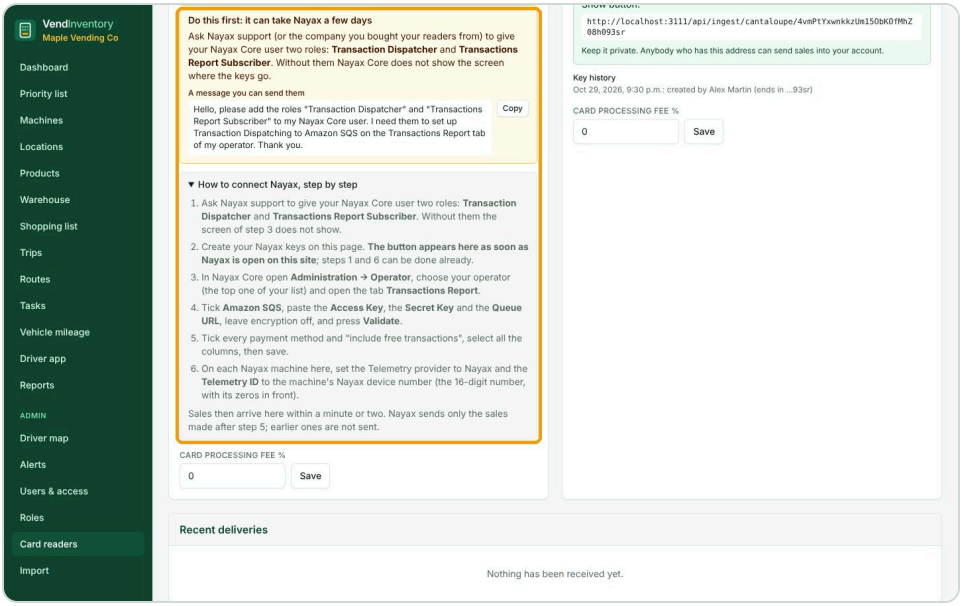
3. In Nayax Core: Administration → Operator, choose your operator, tab Transactions Report.

4. Tick Amazon SQS, paste the Access Key, the Secret Key and the Queue URL, leave encryption off, press Validate.

5. Tick every payment method and "include free transactions", select all the columns, save.

6. On each Nayax machine here, set Telemetry provider = Nayax and the Telemetry ID = its 16-digit device number.

Sales arrive within a minute or two. Nayax sends only the sales made after step 5.

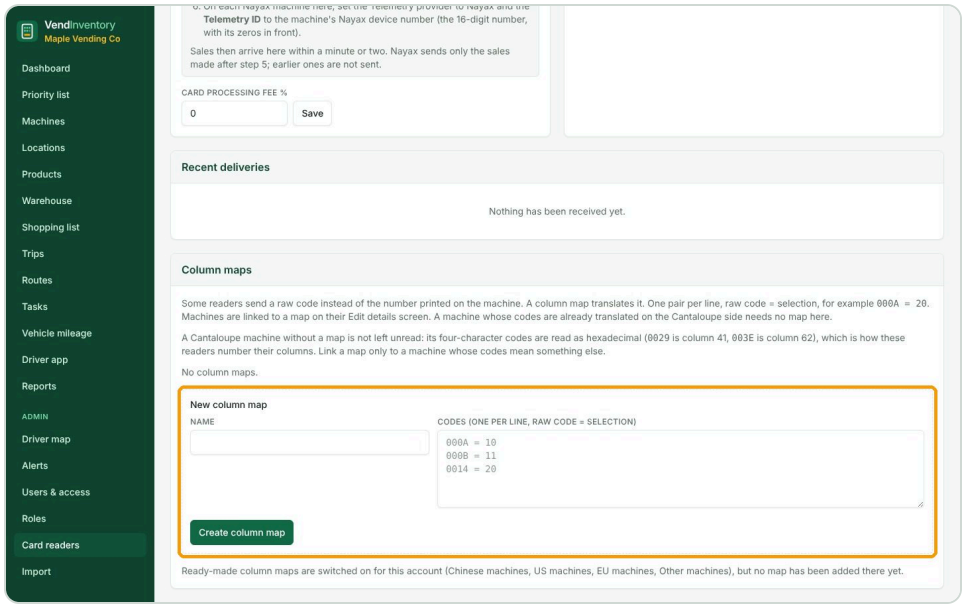


Nayax: ask for two roles, create keys, paste them in Nayax Core

4.5 Column maps (only if needed)

Some readers send a raw code instead of the number on the machine. A column map translates it: one pair per line, raw code = selection (for example 000A = 20). Link the map to the machine on its Edit details screen.

Cantaloupe four-character codes are read as hexadecimal automatically (0029 is column 41), so most machines need no map. Ready-made maps (an extra) can be added with one press.

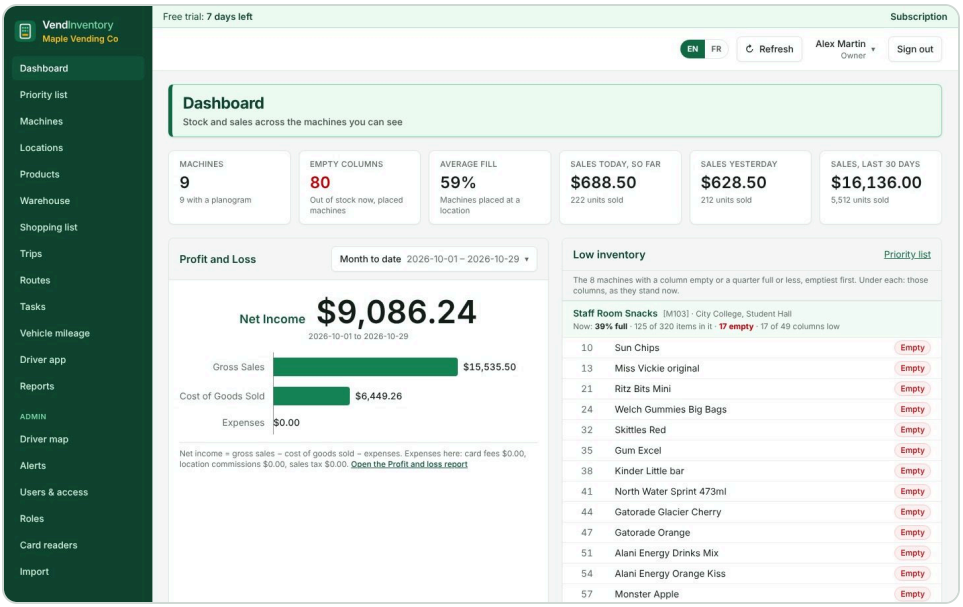


Column maps translate a reader's raw codes into column numbers

4.6 Sales arriving

From then on every sale, cash and card, arrives by itself. The Dashboard shows sales today, yesterday and in the last 30 days, the month's Profit and Loss, low inventory, recent sales and the top machines and products.

On Card readers, Recent deliveries shows what arrived and whether each sale was matched to a machine and a product.



Once connected, sales appear on the Dashboard as they happen

CHAPTER 5

Trips and the driver app

Decide which machines to visit, make a trip, and service the machines from the phone.

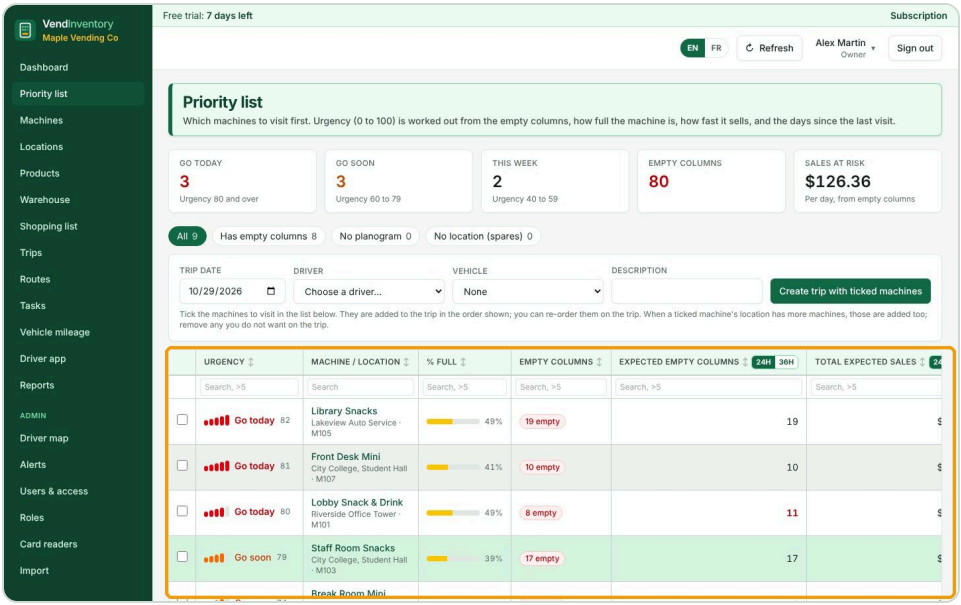
▶ Video: 05-trips-and-driver-app.mp4

5.1 The Priority list

The Priority list ranks the machines by urgency (0 to 100): empty columns, how full, how fast it sells and the days since the last visit. Go today, Go soon and This week are counted at the top.

Expected empty columns and Total expected sales (24H or 36H, chosen in the column header) show what the machine will look like when the driver gets there.

Tick machines, choose the date, driver and vehicle, and press Create trip with ticked machines. Hide machines already on today's trips keeps the list to what still needs planning.



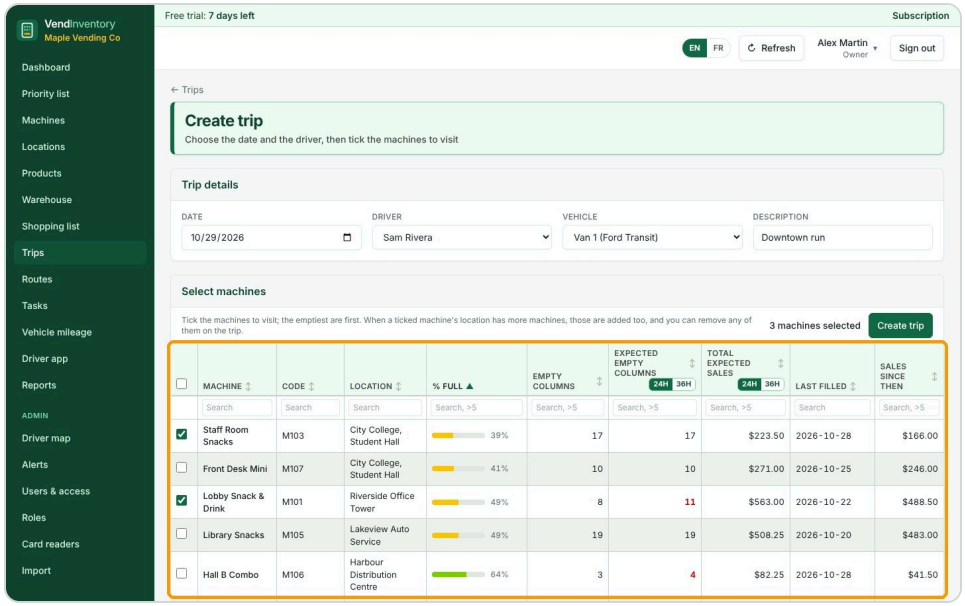
Priority list: which machines need a visit first

5.2 Create a trip

Trips → Create trip. Choose the Date, the Driver, the Vehicle and a Description.

Tick the machines to visit (the emptiest come first). When a ticked machine's location has more machines, those are added too; you can remove any of them on the trip.

Press Create trip.



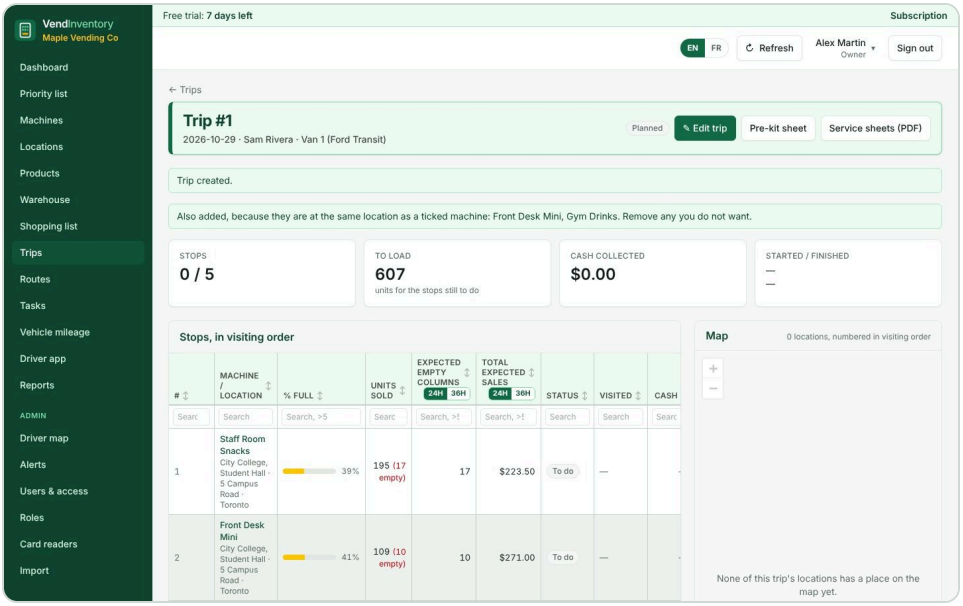
Trips → Create trip: date, driver, vehicle, and tick the machines

5.3 The trip's page

The trip's page lists the stops in visiting order, with units to fill, expected empty columns and expected sales. Drag a stop, or use ⇄ Best visiting order for the least driving from the warehouse and back.

Pre-kit sheet: what to load in the van, by product. Service sheets (PDF): one sheet per machine, to print.

While the driver works, each stop shows Done, the cash and the time.



Stops in order, the map, the pre-kit and the service sheets

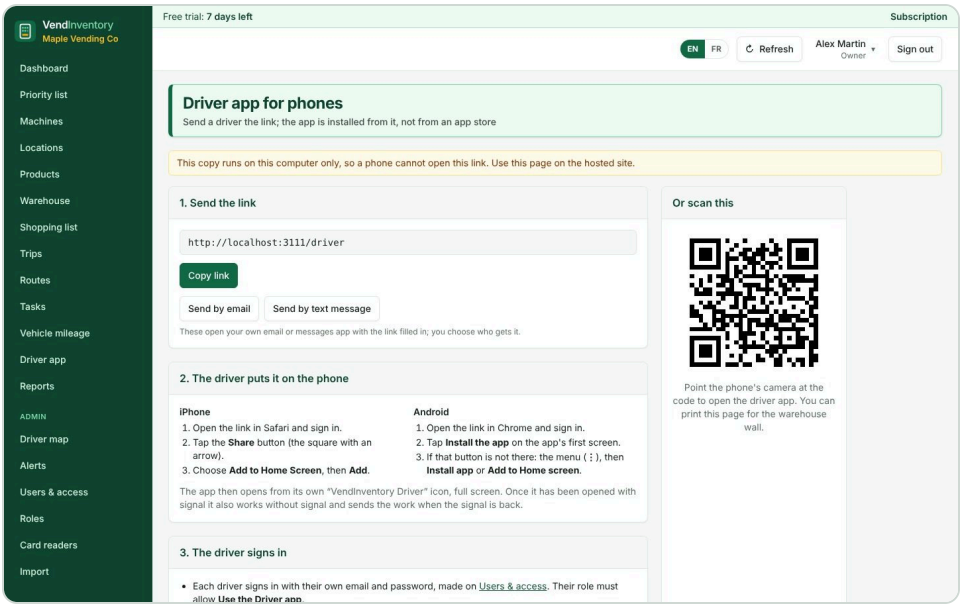
5.4 Put the driver app on the phones

Open Driver app for phones (from Trips) and send the link (Copy link, Send by email, Send by text message), or let the driver scan the QR code.

iPhone: open the link in Safari, sign in, Share → Add to Home Screen.

Android: open it in Chrome, sign in, tap Install the app (or menu ⋮ → Install app).

Each driver signs in with their own email and password (Users & access). Once opened with signal, the app works without signal and sends the work when the signal is back.



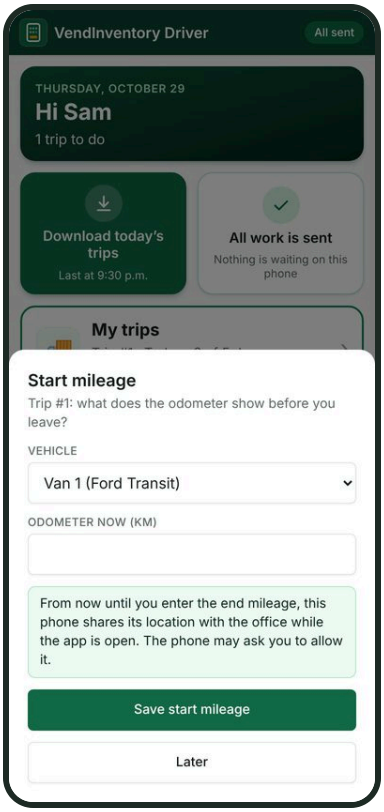
Driver app: send the link; it installs from the browser

5.5 The driver downloads the trip

The driver presses Download today's trips. The trip is now on the phone, and works with no signal.

The app asks for the start mileage of the vehicle (Save start mileage, or Later). After the last machine it shows the way back to the warehouse and asks for the end mileage.

A driver sees only the trips given to them, from the trip's day on. Tomorrow's trip can be downloaded the day before, to look at, once today's trip is finished and sent.

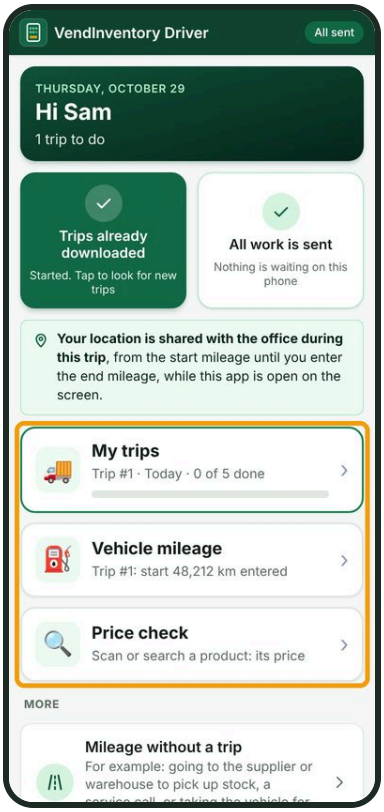


Download today's trips; the start mileage is asked

5.6 The driver's home screen

My trips: the trip and how many stops are done (one tap opens it). Shopping (when the role allows it), Tasks (with urgent and new badges), Vehicle mileage (orange when a reading is due) and Price check (scan a product to see its price).

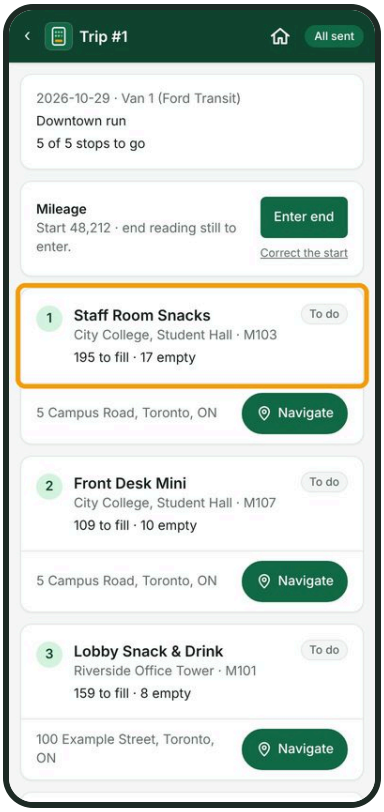
The two buttons on top: Download today's trips, and Send my work / All work is sent.



Big cards: My trips, Shopping, Tasks, Vehicle mileage, Price check

5.7 The stops

The trip shows each stop with the units to fill and the empty columns. Navigate opens Google Maps with directions to the address. Tap a stop to service the machine.

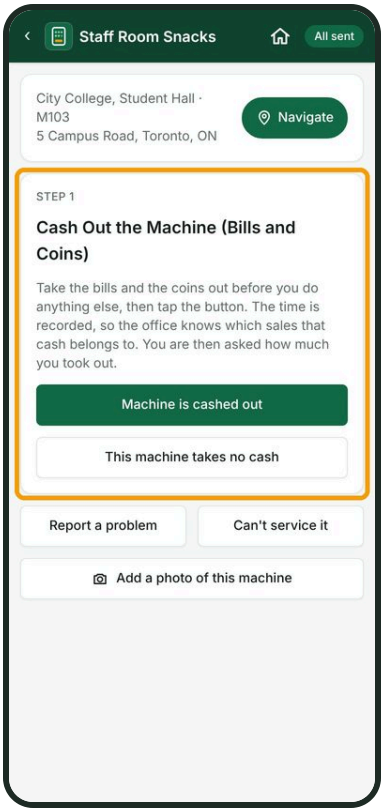


Each stop: what to fill, empty columns, and Navigate

5.8 Step 1: cash out

Step 1: take the bills and coins out first, then tap Machine is cashed out. The time is recorded, so the office knows which sales the cash belongs to. (This machine takes no cash skips it.)

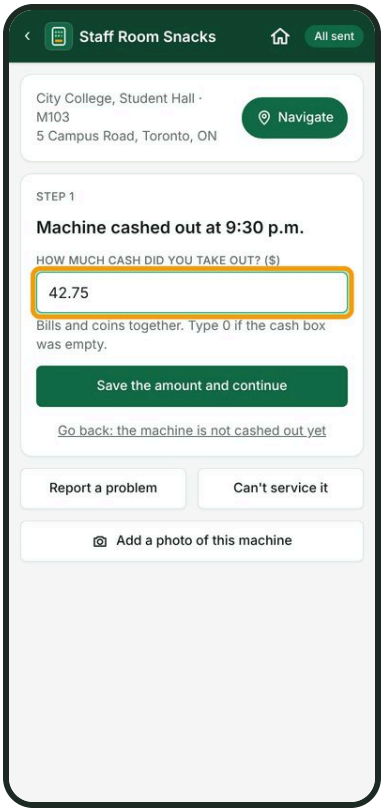
Report a problem, Can't service it (with a reason) and Add a photo are always available.



Cash out first: the time is recorded

5.9 How much cash

Type how much cash was taken out (bills and coins together; 0 if the box was empty) and press Save the amount and continue.

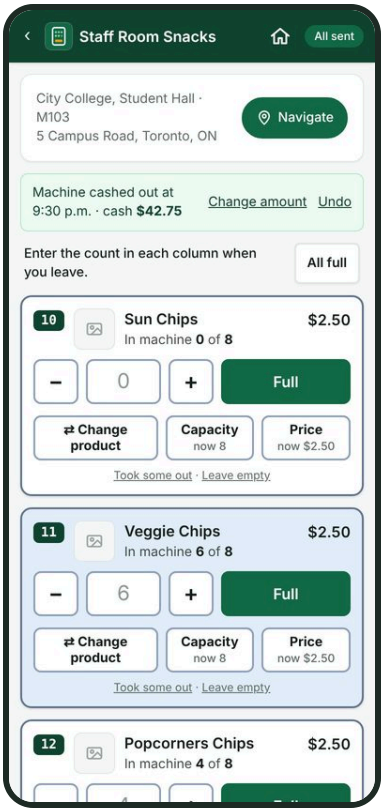


Type the cash taken out, bills and coins together

5.10 Count and fill each column

For each column the app shows the product, the units in the machine and the price. Enter the count after filling, use + and −, or tap Full (All full fills every column).

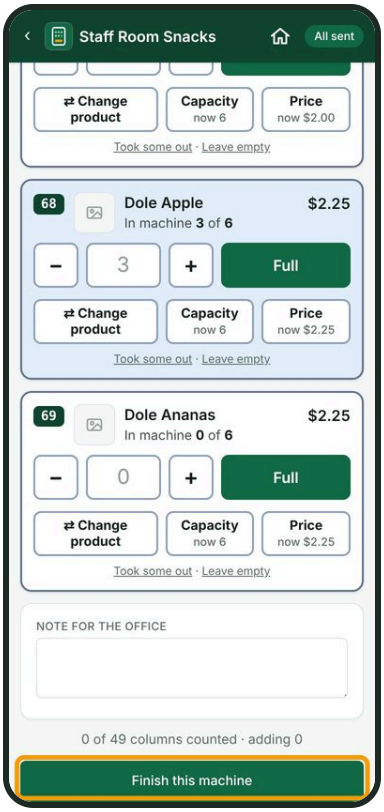
Change product, Capacity and Price change the planogram from the phone; Took some out records expired or damaged items. A price that differs from what the machine charges is flagged to check.



For each column: what is in it now, or Full

5.11 Finish the machine

Add a note for the office if needed and press Finish this machine. With no signal, the visit is kept on the phone and sent by itself later.

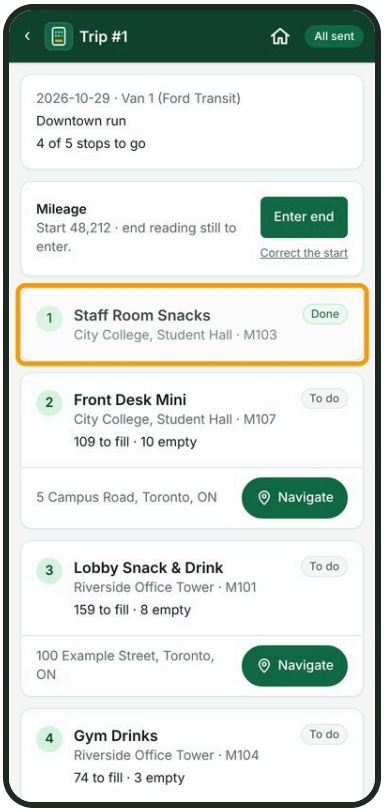


Add a note for the office, then Finish this machine

5.12 Done, and on to the next

The stop shows Done. The office has the visit, the cash and the counts right away, and the warehouse stock goes down by what was filled.

Until the end of the day, the driver can open the machine again to correct what was sent.

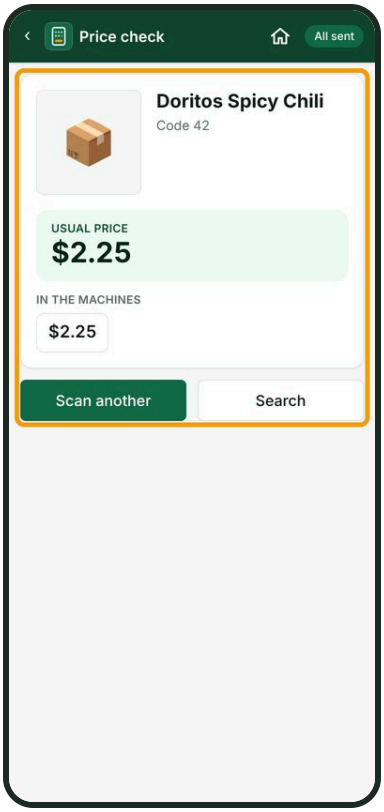


The stop is marked Done; the office sees it at once

5.13 Price check

Price check: scan a product's barcode, or search by name or code, to see its picture, usual price and the prices it has in the machines. Nothing can be changed there; it works with no signal.

It is a permission (Price check in the driver app) that you can untick on a role.



Scan or search a product: its usual price and prices in the machines

CHAPTER 6

Warehouse and shopping

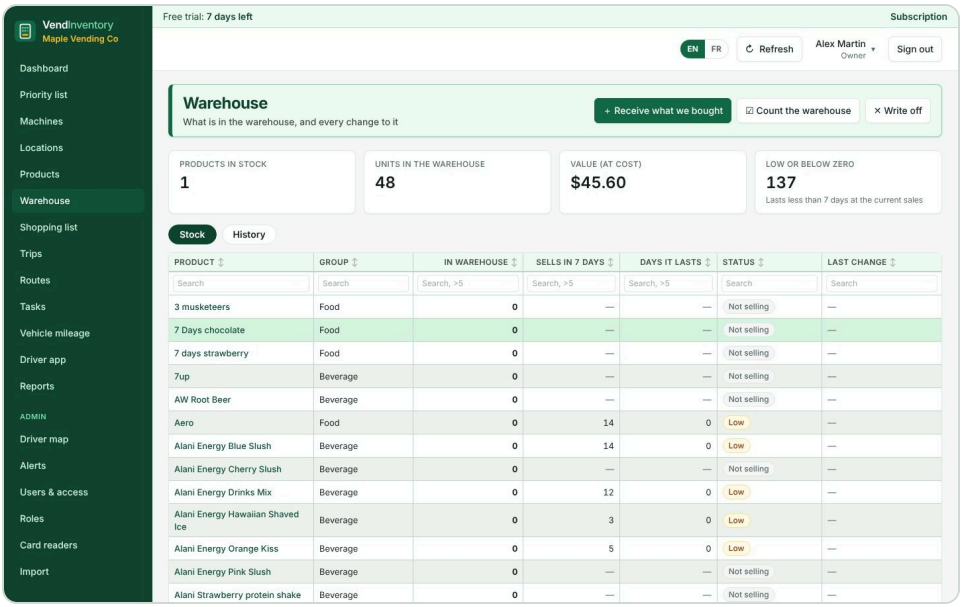
Know what is in stock, what to buy, and keep the warehouse right.

▶ Video: 06-warehouse-and-shopping.mp4

6.1 The warehouse stock

Warehouse shows products in stock, units, value at cost and what is low or will last less than 7 days at the current sales.

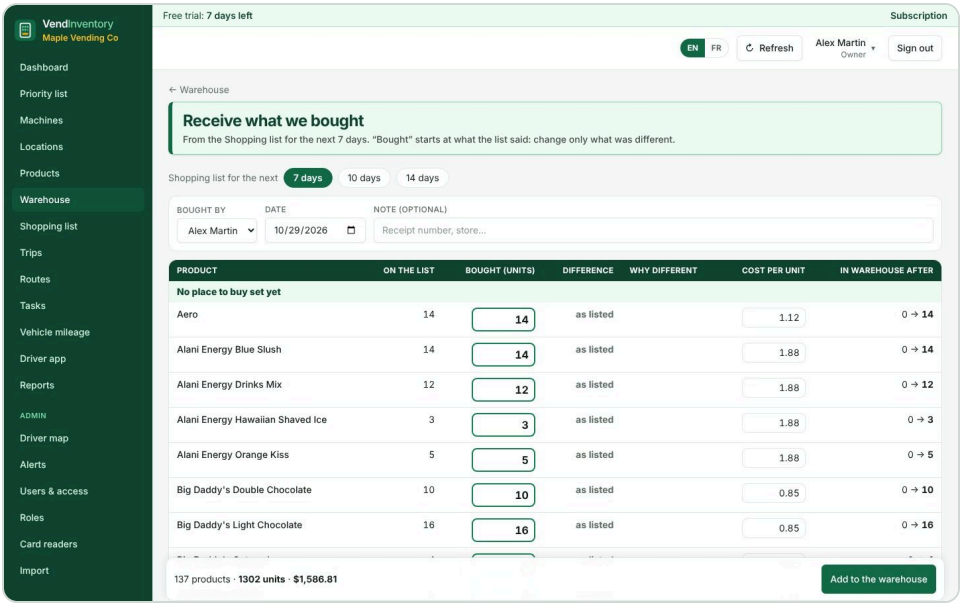
Stock goes down when a driver fills a machine and up with what you receive and what drivers bring back. History lists every change; click a product for its own history.



Warehouse: stock, value, what runs low, and every change

6.2 Receive what you bought

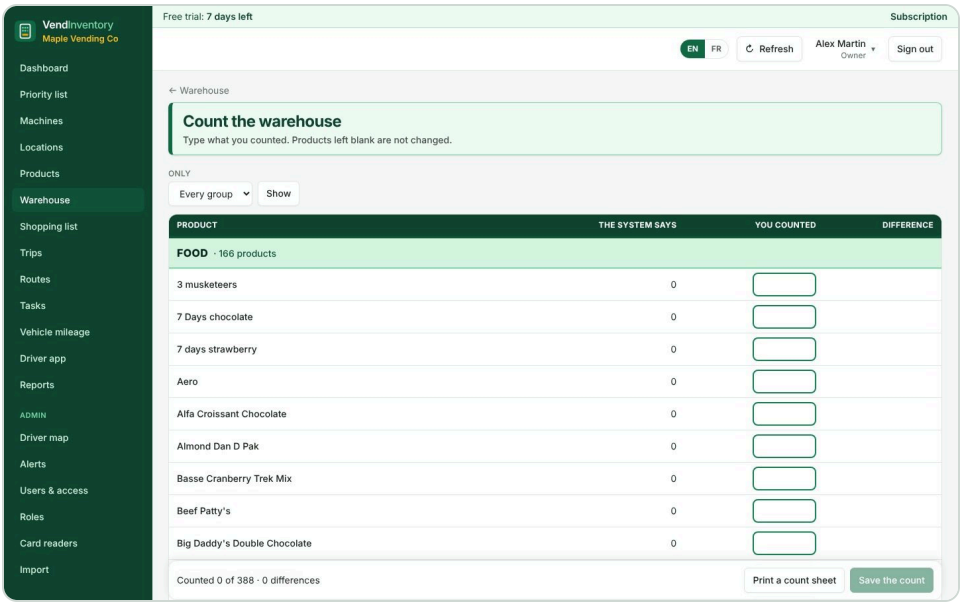
Press + Receive what we bought. The list starts from the Shopping list (7, 10 or 14 days); change any quantity to what you actually bought, note a different reason if needed, and press Add to the warehouse.



Receive what we bought: enter what came in

6.3 Count the warehouse

☑ Count the warehouse: type what you counted. Products left blank are not changed; differences are recorded in the history. Print a count sheet to count on paper first.

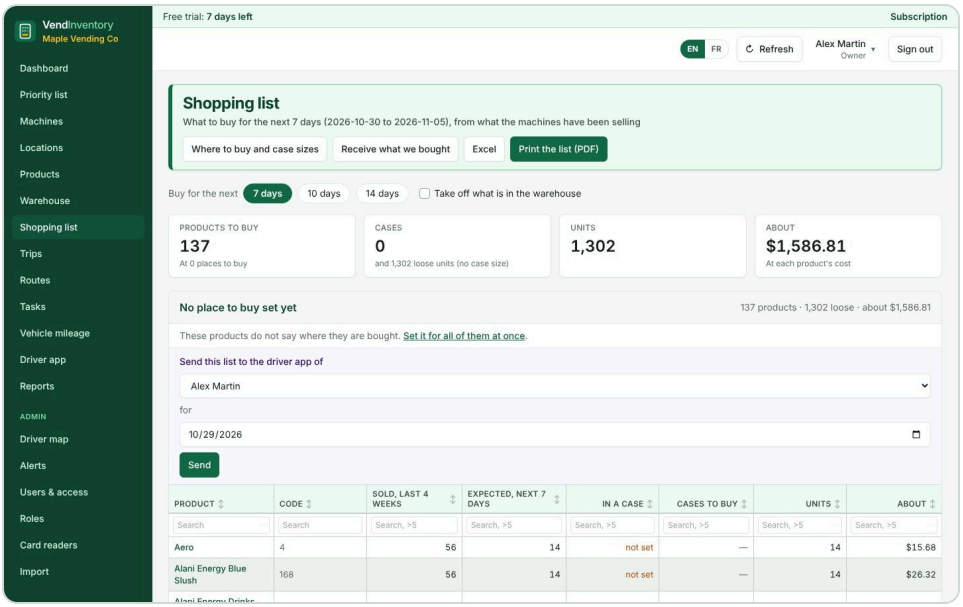


Count the warehouse: type what you counted

6.4 The Shopping list

The Shopping list (an extra) works out what to buy for the next 7, 10 or 14 days from the card readers' sales, in whole cases and grouped by where it is bought.

Print the list, export it to Excel, or send it to a driver's phone: the driver ticks what was bought, out of stock or a different amount, and the warehouse is updated.



Shopping list: what to buy for 7, 10 or 14 days, by store

CHAPTER 7

Reports

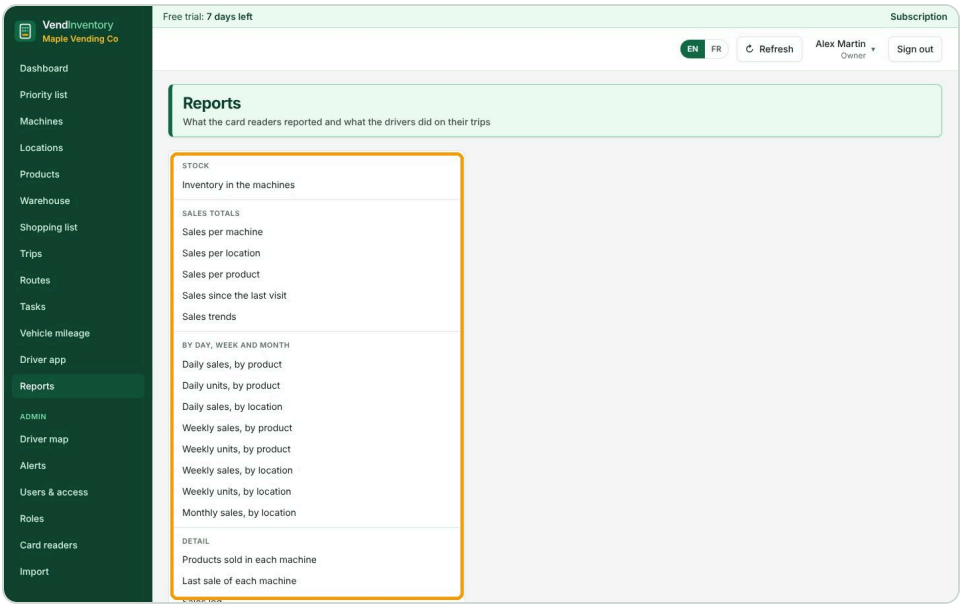
See your sales, profit, cash and trips, and export them to Excel or PDF.

▶ Video: 07-reports.mp4

7.1 The list of reports

Reports lists about 30 ready-made reports in groups: Stock; Sales totals; By day, week and month; Detail; Profit, tax and commission; Trips and drivers.

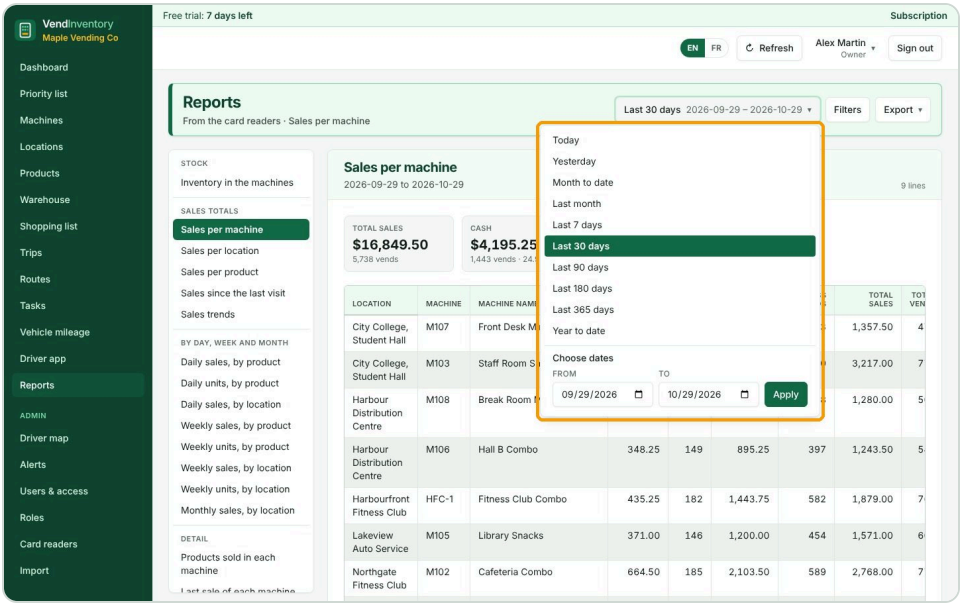
A person limited to some machines gets the reports for their own machines only. Cost and profit need the permission to see product costs.



Reports: stock, sales totals, by day and month, money, trips

7.2 Choose the dates

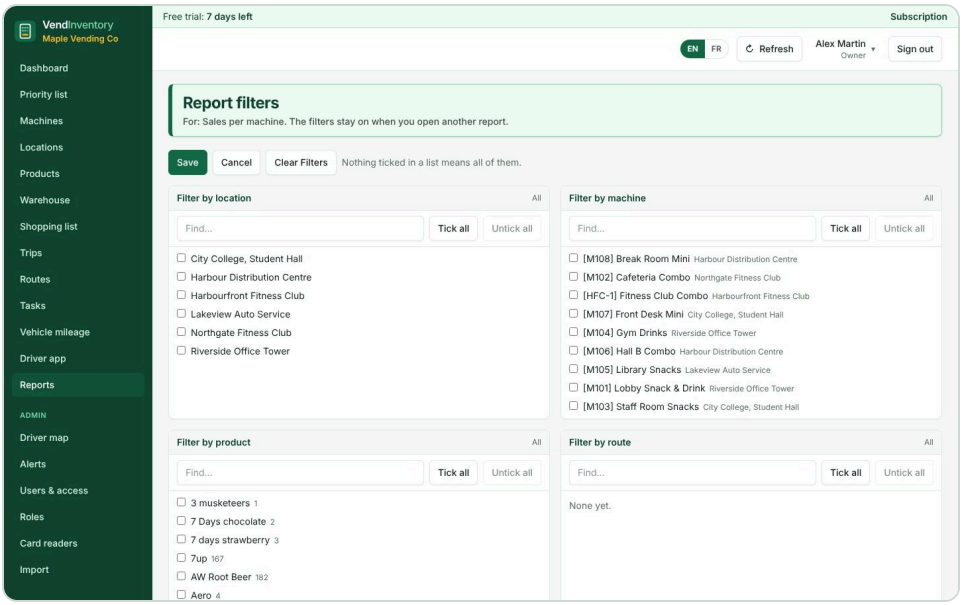
The date menu: Today, Yesterday, Month to date, Last month, Last 7/30/90/180/365 days, Year to date, or Choose dates (From, To, Apply). Key figures sum up the report at the top.



Today, last 30 days, last month... or choose your own dates

7.3 Filters

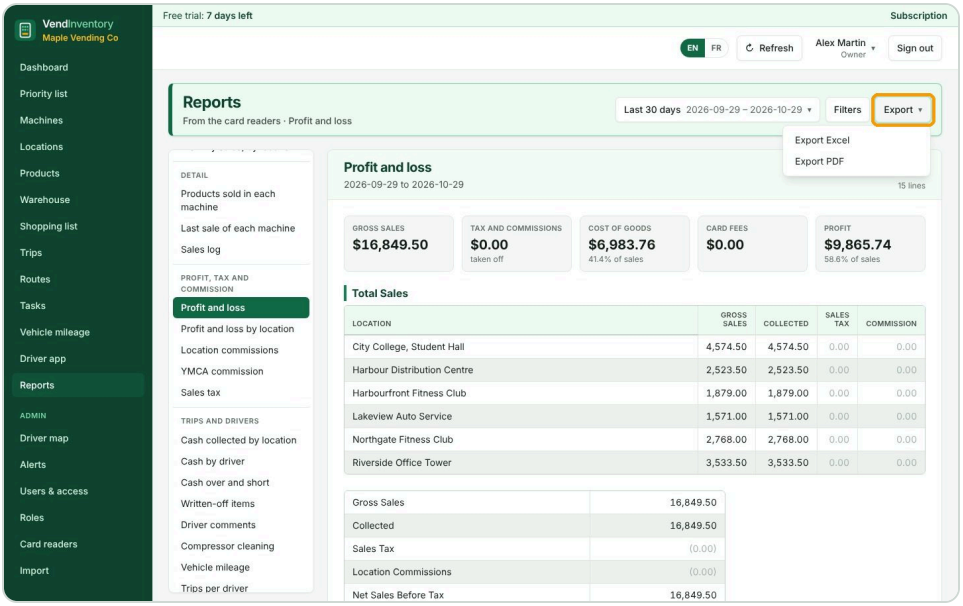
Filters: tick locations, machines, products or routes, and press Save. They stay on when you open another report, until you press Clear filters.



Filters: locations, machines, products or routes

7.4 Profit and loss, and exporting

Profit and loss: sales, cost of goods sold, card fees, commissions, sales tax and net profit. Export → Excel or PDF works on every report, with the same dates and filters.

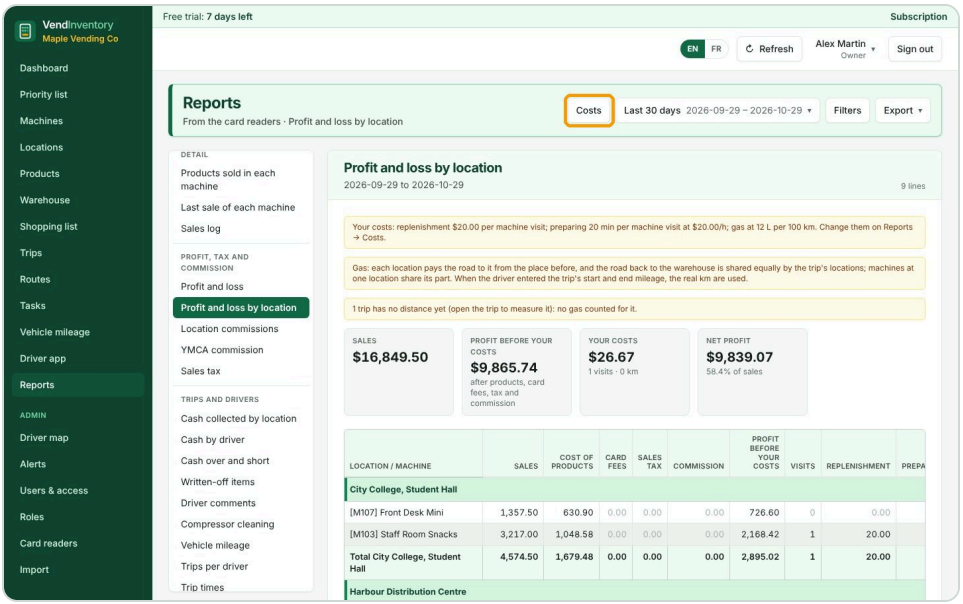


Export: Excel or PDF of any report

7.5 Profit and loss by location

Profit and loss by location: for each location and machine, the profit after tax and commission, less your costs: a replenishment fee per visit, the preparing time at the warehouse, and the gas of the trips (each location pays the road to it and a share of the way back).

Costs: set the fee per visit, the preparing minutes, labour per hour, the van's gas use and the gas price of each month.



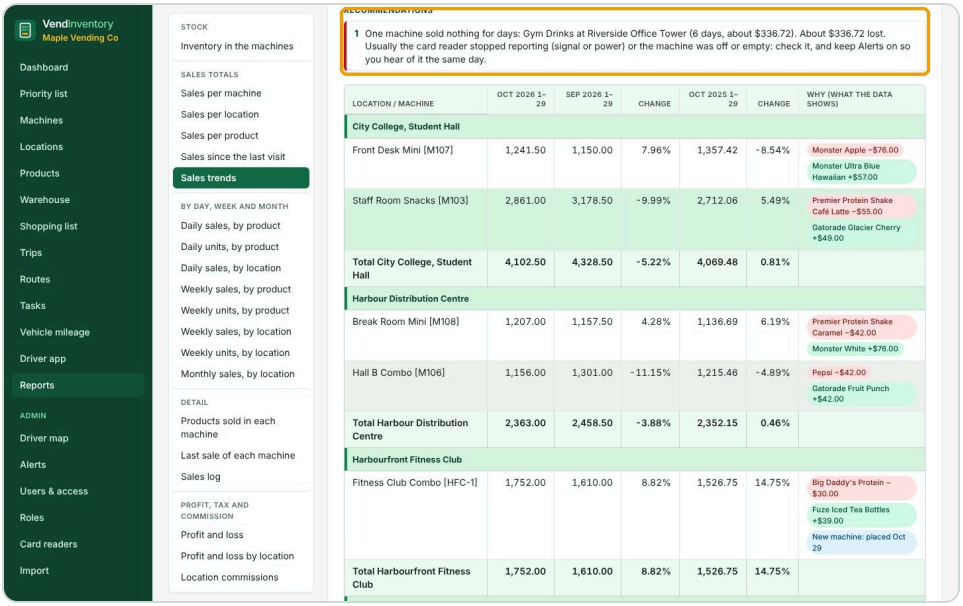
After commission, tax, gas, and your cost per visit

7.6 Sales trends

Sales trends: choose a month; each location and machine is compared with the month before and the same month last year (on the same days for the current month).

Why: no sales for days, columns found empty at the visits, fewer visits, price and product changes, the products that moved most, a whole location up or down.

Recommendations come first, the most useful at the top.

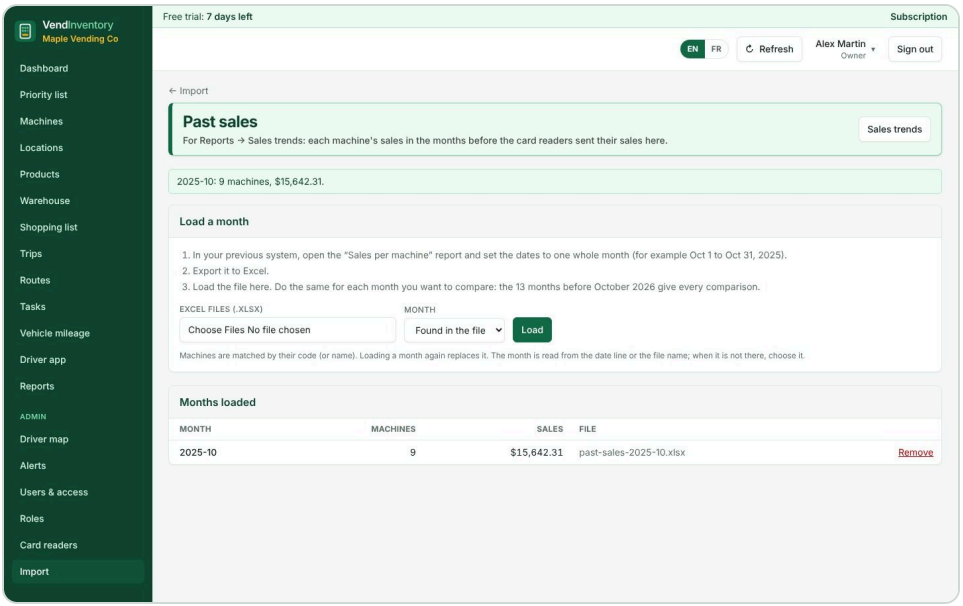


This month vs last month and last year, with reasons and advice

7.7 Bring in your past sales

Import → Past sales: in your previous system, export the "Sales per machine" report for one whole month to Excel and load it here. Machines are matched by code or name; loading a month again replaces it.

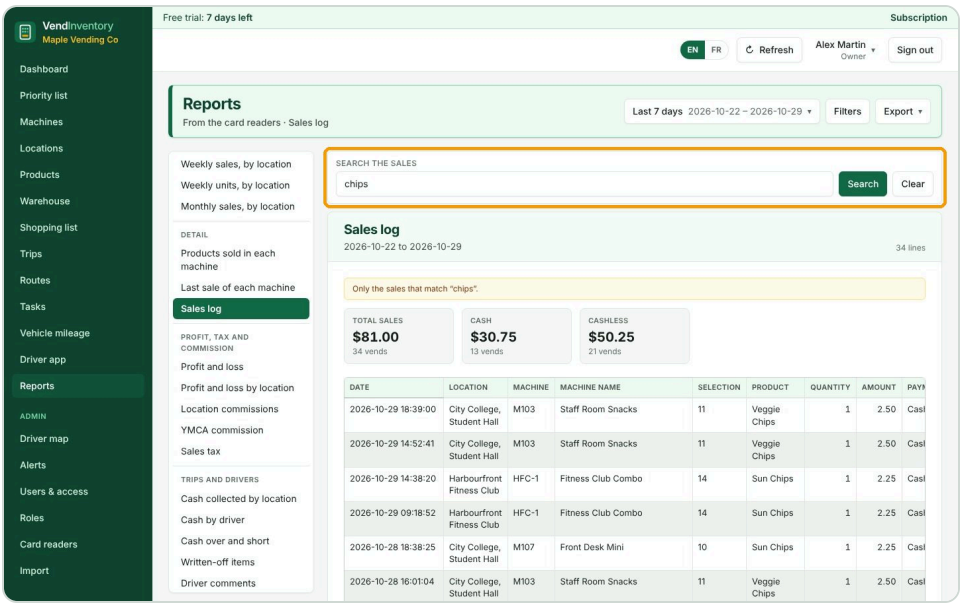
Do this for each month you want to compare; the 13 months before you started give every comparison.



Import → Past sales: one month per file from your previous system

7.8 Search the sales log

Sales log: every sale, newest first. Search by location, machine, product, selection, the card's last 4 digits, cash or card, or an amount (2.25). The total and the files follow the search.



Sales log: search by location, machine, product, card or amount

CHAPTER 8

Your team, tasks and alerts

Give each person the right access, follow up problems, and be warned when a machine stops.

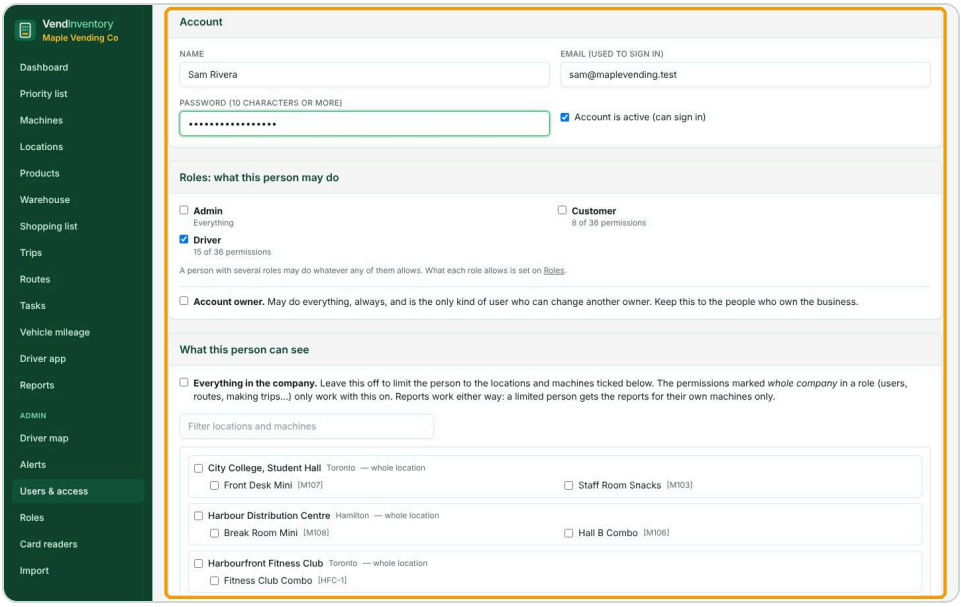
▶ Video: 08-team-tasks-alerts.mp4

8.1 Add a person

Users & access → New user: Name, Email (used to sign in), Password, and the roles (Admin = everything; Driver; Customer; or your own roles).

What this person can see: Everything in the company, or only the locations and machines ticked below (a whole location also covers machines added there later).

Owners and admins are asked for a code by email when they sign in from a new device.

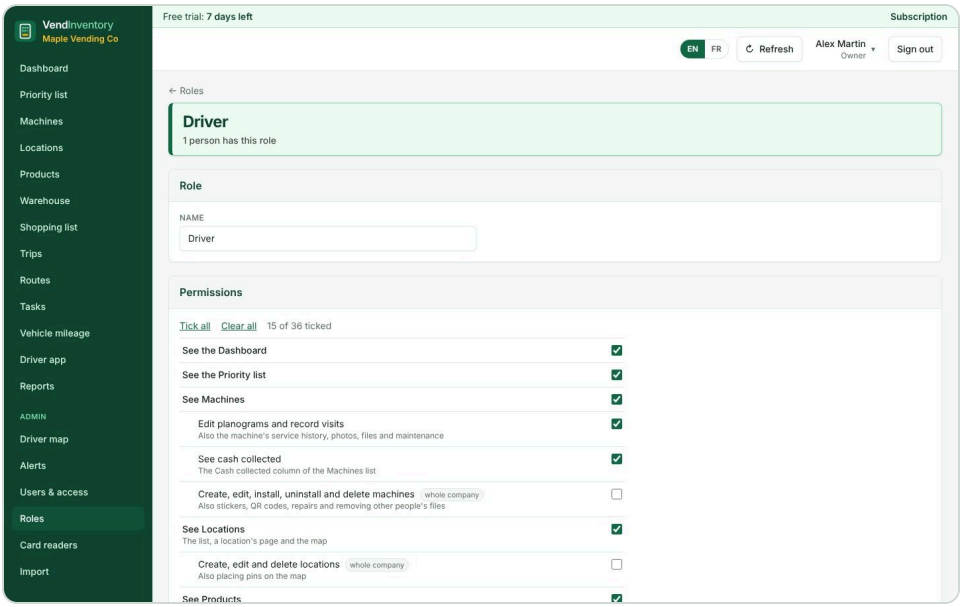


Users & access → New user: email, password and roles

8.2 Roles and permissions

Roles: tick exactly what each role may see and do: screens, editing planograms and recording visits, seeing cash and costs, making and changing trips, the driver app and its shopping and price check, tasks, reports, alerts and more.

The built-in Admin role is every permission and cannot be changed. A person with several roles may do whatever any of them allows.

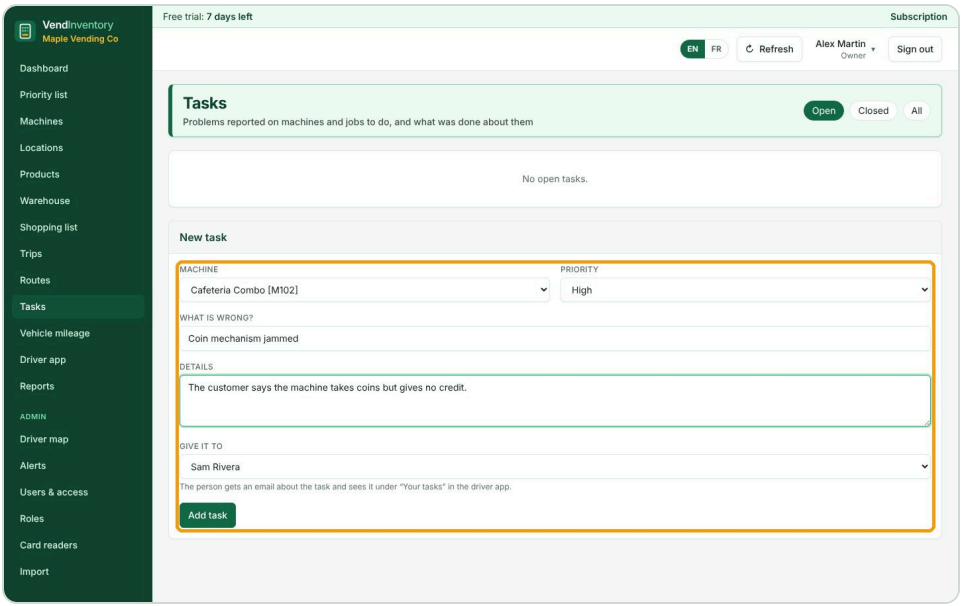


Roles: tick exactly what each role may see and do

8.3 Tasks

Tasks: machine, What is wrong, Details, Priority and Give it to. The person gets an email and sees it under Tasks in the driver app, where they report Fixed or Still needs work.

Customers can also report a problem by scanning the QR sticker on the machine.

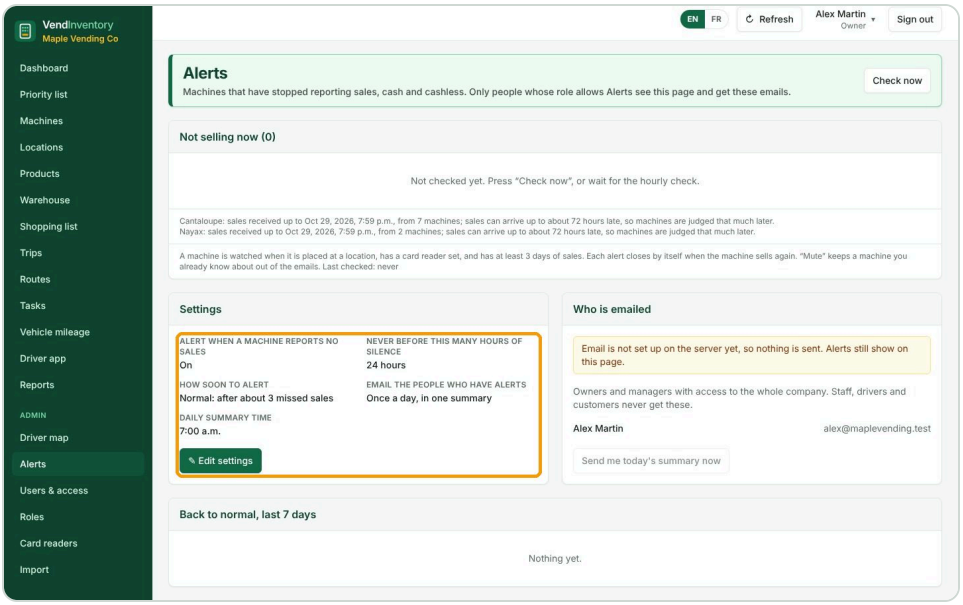


Tasks: problems and jobs, given to a person

8.4 Alerts

Alerts lists the machines that stopped reporting sales (cash and card), judged against what each machine normally sells in the same hours of the week.

Press ✎ Edit settings: on or off, the hours of silence before an alert, how soon (after about 2, 3 or 5 missed sales), and one email a day at the time you choose, or no emails.

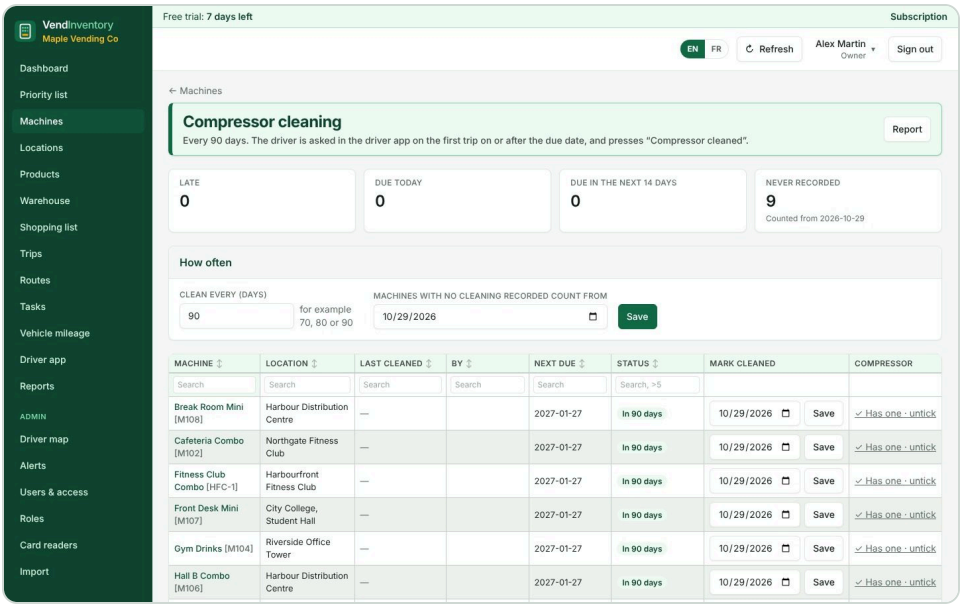


Alerts: be told when a machine stops reporting sales

8.5 Compressor cleaning

Machines → Compressor cleaning: set how often (for example every 70, 80 or 90 days). The driver is asked in the driver app on the first trip on or after the due date and presses Compressor cleaned.

Untick machines with no compressor. A Compressor cleaning report shows every machine's last and next cleaning.



Cleaned every N days; the driver is reminded on the day

Every day, every week

Every day

Open the Dashboard and the Priority list. Plan the trips for the machines that need a visit, and check the Alerts for machines that stopped selling.

Drivers download their trips in the morning, service each machine (cash, then fill), and finish the trip with the end mileage. The office sees each visit as it is sent.

Every week

Look at the Shopping list, buy, and press Receive what we bought. Check Sales per machine and Products sold for slow sellers, and use the product suggestions on a machine's page to replace them.

Every month

Open Profit and loss and Profit and loss by location, then Sales trends to see which locations went up or down and why. Pay the location commissions from the Location commissions report, and count the warehouse.

Need help?

Every screen has short notes under its fields. For anything else, write to us from the Contact page on vendinventory.com.