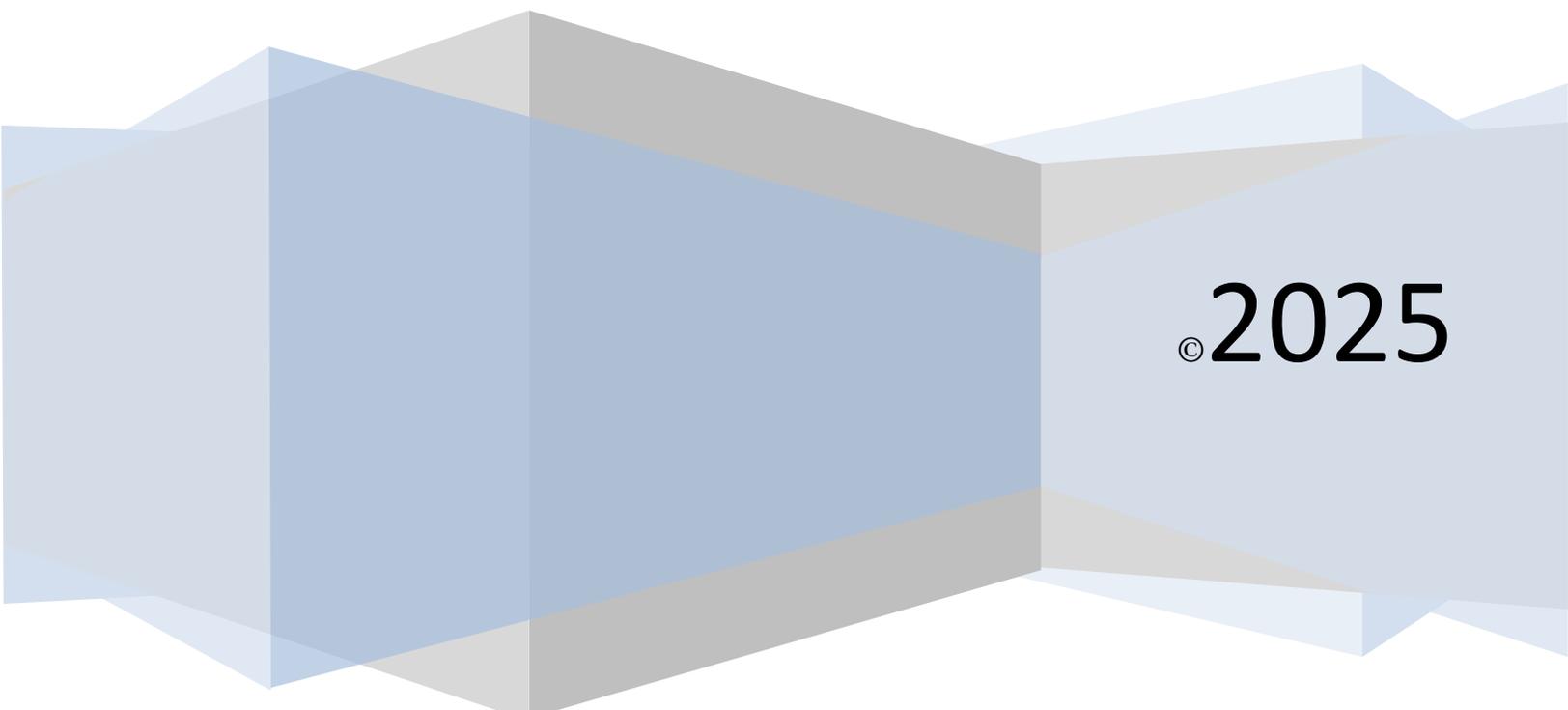


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# Toucan – Quick Start Guide

Part of the eManage VMS Cloud

Powered by VendingZoo.com



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## Intro – What is Toucan?

Toucan and Toco along with the other applications that make up eManage are web based VMS (Vending Management System) applications created by VendingZoo.com and hosted in the HealthyYOU eManage VMS cloud. A 'Cloud' based system is just a term for systems and applications that can store your data and exist on the internet so you can access that data from anywhere on anything as long as you are also connected to the internet with a browser. Toucan and Toco are web applications because they are basically just a website that runs in a web browser, there is nothing to download or install. This is different from a 'native' application that runs directly in the operating system of your computer (Windows, Mac or Linux) and must be installed. Since Toucan and Toco are web based they do not access your computer's operating system directly like a native application so they do not know if they are running on a PC, Mac, Android, iOS, Unix, or a Linux computer. This enables them to run wherever a web browser runs on any computer/device that can run a web browser – which is pretty much most computers, tablets, and phones in our day.

The Toucan and Toco applications are created to be simple, yet powerful, intuitive tools to help you track and manage your vending data and make the information as accessible and secure as possible from anywhere you happen to be. So that you have the information you need to grow your business and monitor it in as easy and convenient a way as possible.

*Toucan* is the application for running in your computer web browser, like a PC, Mac or laptop. It is the more robust and feature rich application because a computer typically has more horsepower and much more screen real estate than a smaller device like a phone.

*Toco* (Tōkō - the largest and most familiar South American toucan) is the smaller footprint application for running in a mobile browser on a small device with a smaller screen, like a tablet or phone. Since both Toucan and Toco are hosted in the eManage cloud, any information you enter into one of them is shared by both of them and changes occur instantly.

## Using the eManage Cloud VMS (Vending Management System)

Logging into Toucan or Toco is done through your web browser. The web browsers of choice for these applications are the chrome or firefox browsers. Chrome is the web browser built by Google, Firefox is created by Mozilla.

### Browser Downloads

A version for running on a desktop computer

Chrome – <https://www.google.com/chrome/browser/desktop/index.html>

Firefox – <https://www.mozilla.org/en-US/firefox>

And a version for running on a mobile device

Chrome – <https://www.google.com/chrome/browser/mobile/index.html>

Firefox – <https://www.mozilla.org/en-US/firefox/mobile>

There is no charge for downloading, installing and using these browsers. They are fast and secure web browsers that run on virtually all popular devices. The eManage software is developed using the chrome browser.

## Browser Refresh

No matter the browser you use, when you refresh your browser while in Toucan or Toco – this reloads the web application from scratch. You can think of it sort of like rebooting your computer. Refreshing the browser that is running Toucan or Toco is like rebooting them – so anything that you haven't saved when you refresh will be lost. Toucan and Toco do not save automatically for you; this gives you the control over Toucan and Toco to save your data when you are ready. You can do a hard reset of a website in all the major browsers. This is great to completely refresh the application in your browser and forces the browser to pull all of the application files down again from scratch to make sure you have the latest version of the app.

### Refresh for Chrome, Mozilla Firefox, and Internet Explorer

- **Windows/Linux** – Hold down the Ctrl key and press F5 on the keyboard
- **Mac** - Hold down ? Shift and click the Reload button

## Logging into the eManage Cloud

Once in your web browser and surfing the internet go to the HealthyYOU support site (<http://support.healthyyouvending.com/wp-login.php>) and login to the support site. Then click the 'Vending Software' button and you will see the eManage Cloud button. Click eManage Cloud to open the login screen for the VendingZoo Portal;

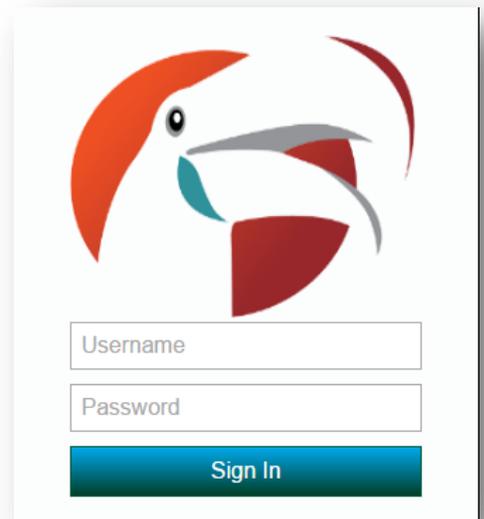
Or go to <https://vendingzoo.com> and click the 'Login' button to open the login screen.

Once at the login screen type in your User ID and Password that you have been given and click Sign In. If your password or user id is incorrect you may get a message 'Incorrect username or password'. If that happens just try again and wait for a few seconds to see if you get logged in. When you get logged in the login window goes away and you will be taken into the portal. This can take up to 10 seconds the very first time you login while your browser loads the portal for the first time.

If your Browser prompts you to save your User Id and Password – it's fine to say yes if this is a computer/device that you have control over and not a public one. Chrome is secure in this area and it does make for a faster way of authenticating into your VMS software. However, if you are trying out a tablet at Best Buy or Costco and you login to your software so you can scope it out and see how it looks on that device before you buy it, which is fine to do, it's better if you don't allow the browser on that public device at the electronic store to 'cache' or save your credentials for logging in. Many a facebook account has been hacked while browsing devices at electronic stores because someone lets the device save their password. So just be mindful of your passwords for any application.

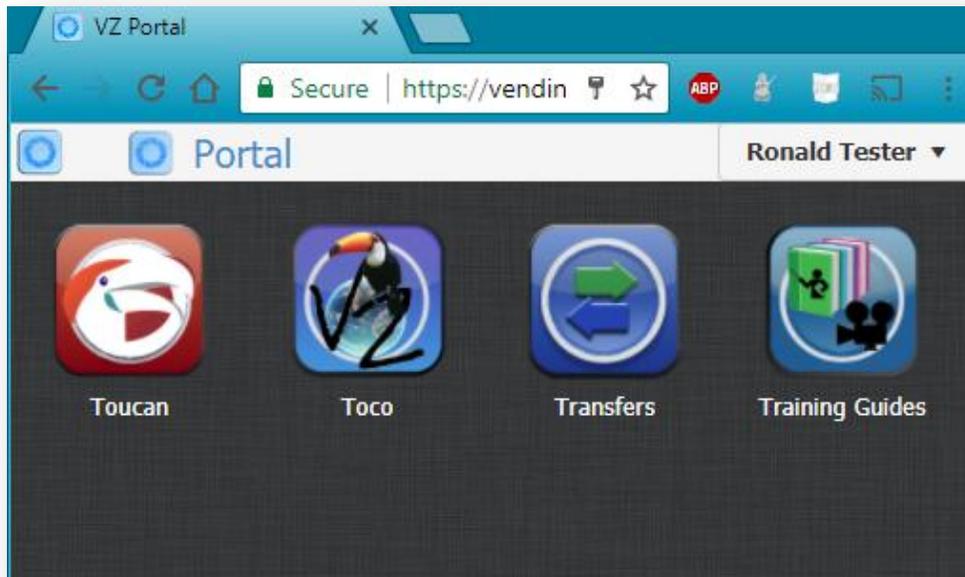
Your one password for the portal will get you into any of the eManage cloud applications.

*Your password for the HealthyYOU online support center and for the eManage cloud are originally setup to be the same as a convenience. But they are independent of each other. You can change your password for one and it will not change your password for the other.*



The image shows a login form for the eManage Cloud portal. At the top is the Toucan logo, a stylized bird with orange, red, and teal feathers. Below the logo are two input fields: 'Username' and 'Password'. At the bottom is a blue 'Sign In' button.

## Vending Zoo Portal and Security



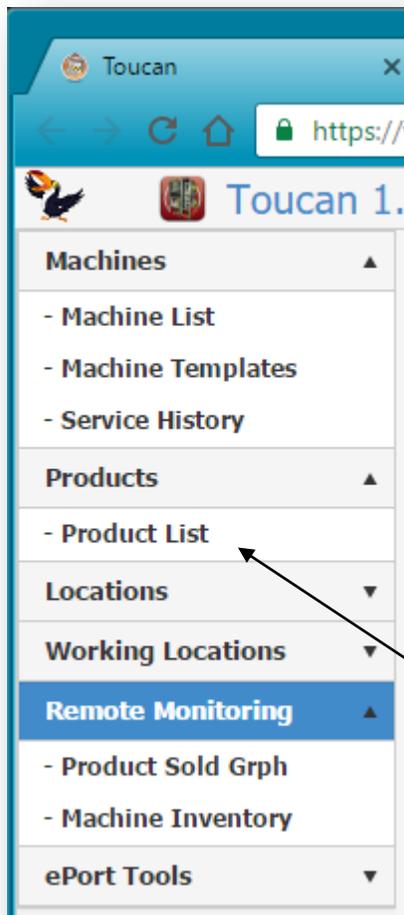
(You can move your icons in your portal to change their order if you would like by clicking and dragging)

Once you get logged in you will be taken to the VendingZoo Portal – you can think of the portal as sort of like your ‘desktop’ for all the eManage Cloud applications. You can bookmark the portal or any of the cloud applications for faster access in the future. From the portal you will see the applications and resources you have access to. Clicking on any of the ‘buttons’ will open up a new browser tab with that application. You can open multiple applications simultaneously, even the same application multiple times if you need (hold the ctrl key and click the button to open multiple instances of the same app). You can click and drag your button icons and move them to put them into the order that you want. The two main applications are Toucan (the main application for running in desktop browsers) and Toco (the smaller application designed for smaller screens like phones and tablets in mobile browsers).

You can run Toucan in a mobile browser but it will seem a little squished. You can run Toco in a desktop browser and you will have plenty of room - it might seem a little to spread out but you can do it. Additionally in the portal you may find other buttons that will take you to video tutorials and other resources. This will also be the place for any future applications when they are needed.

Once you are in the portal, you can open any application by clicking its button and a new browser tab will open with that application in it. You can open multiple browser tabs of Toucan and Toco if needed. You can bookmark a specific application and bypass the portal to go directly to that application if you want. **For security and convenience the portal encrypts a cookie on your computer or device with your login credentials, the cookie will last for 10 hours before it goes stale in your browser.** So as long as you don't close your browser you can refresh, close Toucan, open it back up again and you will not have to login (unless it has been over 10 hours since you first opened your browser). So your login session is essentially 10 hours long. After that the cookie expires and you will have to enter your credentials again. If you close down the browser entirely, that will also delete the cookie, and you will have to login again, or if you manually sign out (explained later). This is done to give you the convenience if you are out in the field and you are closing your device and opening it back up again to help you skip an extra step while at the same time keeping you secure so after 10 hours you are forced to enter your credentials again no matter what.

## Navigating around in Toucan



In Toucan all of the navigation is done using the accordion like navigation panel on the left side of your browser.

There are only 3 types of screens in Toucan

- 1) *List Screens* – for searching, exporting, and deleting data.
- 2) *Edit Screens* – For adding and changing data
- 3) *Report Screens*.

Once you learn these 3 screens you will be a cloud master.

If you click on each section in the navigation panel it will expand to show you the options in that section and the arrow icon will point up to show that the section is expanded. Click the section again to collapse it. You can have as many sections open at the same time as needed. For example, click on Machine and it will open up to show you the Machine List, Machine Templates, etc... Click on the Machine List to open your list of machines. You won't see anything show up yet if you haven't added any machines but this is where the machines would show up if you had some.

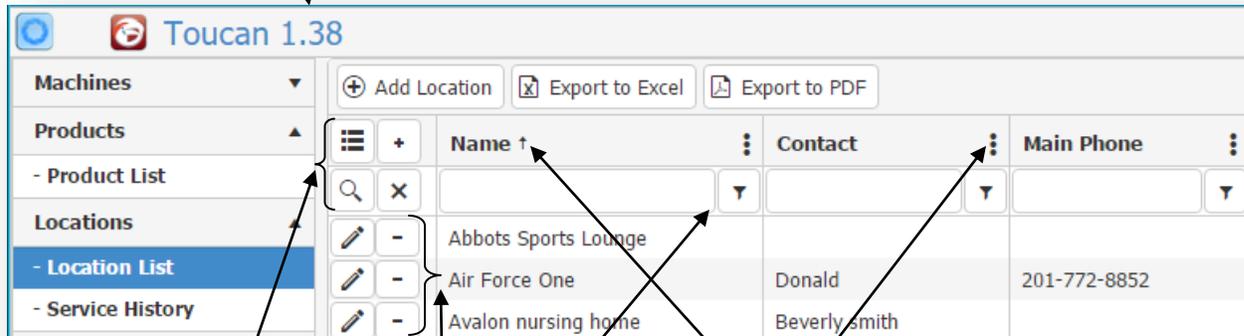
If you open up your Product List you will see some data in that list as there are some products populated for you already to give you a starting point. All List screens look similar – sort of like a grid or spreadsheet.

Most List screens when they open will retrieve back your data automatically, like the Product List does, and on most List screens next to each item in the list will be an Edit and Delete button. If you hover your mouse over these buttons you will get a tool tip to tell you which is which.

The Delete button will always have the [-] icon on it. The Edit button could be a different icon depending on the theme you choose... we will cover themes later in Customizing Options... but generally the Edit button will look like a little pencil. Clicking the Edit button opens up an Edit Screen for the item you clicked and lets you make changes to that item and the Delete button of course removes the item from your database. Let's look at a List Screen in a little more detail...

## List Screens

Application Version Number



The very top row in each of the 'list screens' is a search bar, so you can search for a specific Machine, Location, Product, or whatever you need. You can search by one or multiple columns on the list screen by typing in your search criteria in the area under the column heading.

By clicking directly on a column heading you can sort by that column. The Sort icon will be a little up or down arrow right next to the column name to indicate how that column is being sorted. Click once and the column sorts ascending and the icon points up, click the heading again and the icon changes and points down for descending, click a third time and the icon goes away indicating that sorting for that column is turned off. You can sort using multiple columns to do nest sorting. You can click on a column heading and drag it around to change column order in the list. There is also a column menu at the very end of each of the columns. Click that menu to see a list of all the columns for that list screen and you can hide or show columns in your list. By default they are all shown.

The filter/funnel icons next to each search box in the search bar let you choose what type of search criteria you have typed and how to filter by it. To the very left of the search bar are 4 buttons in a square. The grid layout button lets you save your 'list screen'. So if you re-order columns, change the sort, hide columns, resize, etc - you can save that layout or reset it back to its default. The [+ ] button next to the gear lets you add a new item to your list (there is also usually a button in the button bar, above the search bar, that will have text in it like 'Add Product' if you are on the product list that you can click as well). This will open up a blank edit screen so you can add new things to the list you are on. The magnifying glass is the search button so if you have typed in search criteria and click the search button, it performs the search (enter on a keyboard also triggers a search), if the search bar is clear and there is no criteria, clicking search brings back everything. The [X] button clears out the search row and clears out the list so you can reset your list for a different search.

Next to each item in a list is the Edit and Delete buttons, click the Edit button to open the Edit screen for that item and make changes to it. Click the Delete button (always denoted by the [-] sign) to delete an item from your list and from your cloud database. There is no undo when you delete something from your cloud so be careful.

Additionally you will have the 'Export to Excel' and 'Export to PDF' buttons in the button bar of most search screens that you can use to save your data out to another format or print lists from the search screens when you want. The format that your list is in, column order, column size, visible columns, sort criteria, etc will be preserved when you do an export.

## Getting Started... even before placing your machines

Congratulations on moving forward with your own business. Toucan is an intuitive cloud based tool designed to help you keep track of your data and help you run your business a little easier. Now that you know a little about navigating around and how the List Screens work, there are some basic steps you can take to get started using Toucan right now...

**Step 1... Adding your Machines.** One of the first things you have concrete information about when you really get started in your business is what machines you are going to be using. So you can start with entering your machine information into Toucan as soon as you know some of the details about them. You can enter in the data even before your machines arrive. You can always change this data so don't worry about making any mistakes. See the section in this manual on Adding Machines for more detail.

**Step 2... Adding your Products.** The other thing you can start thinking about is what products you are going to use in your business. Toucan will start you off with a basic product list of some of the more popular products to give you a jump start. You can see this list if you look under the Product section of the navigation bar and click on your Product List. You can change these products or add to them or remove them. See the section in this manual on Adding Product for more detail.

**Step 3... Where to put products in the machine and what price to use.** Even before your machines arrive, if you have thought about what products you are going to use and have them added to your Product List, you can begin to think about where you are going to put those products in the machine, which coil will they go in and what products will be next to them. In other words, how is the machine going to look when someone is standing in front of it. Along those same lines you can begin to think about how much you might price your products at. As you go through this thought process you can document what you are thinking and create a *Machine Template*. A Machine Template comes in handy after you get a machine located and you are going to stock it with product. You can print out the machine template and take it with you when you fill the machine. The templates also help you very quickly create a Working Location in Toucan. A Working Location is when you place a machine at a location. That location now becomes a working location for you.

That's about it... Once you are comfortable creating machines, products, and templates you will be a cloud master and will pretty much be able to fully use your Toucan software.



## Adding Machines – Step 1

**Edit Dufrain Law Office**

\*Name:  Type:

Serial Number:  Model:

Key Number:  Purchased:

eDevice Id:  Price:

(ePort/AirVend Serial Number)

Purchased From:

Active

**Notes**

	Added ▾	Note
<input type="checkbox"/>	9/12/16 20:22	These people are nuts

Adding a machine is just like adding anything else to Toucan. Start by opening up your Machine List from the navigation panel. Once your Machine List is open, click the [+] button in the search bar or click the Add Machine button in the button bar. This will open a blank 'Add New Machine' Screen. (Mine says Edit in the title bar because I clicked an edit button next to a machine in my list but yours will say Add) Then fill in the information...

- Name (required)– something to identify this machine if it were to show up on a report some ideas for naming your machines could be
  - You can use part of the location name and last 4 digits of the serial number
  - If no location is available yet you can use the machine model and part of the serial number ie HY900-1234.
  - Simply Machine1, Machine2, etc. until you place your machines. You can change these names later.
- Serial Number (optional) – The serial number for the machine itself, not the card reader.
- Key Number (optional) – Which key opens up the machine to service it.
- **eDevice Id** – if you have a card reader or other type of credit card reading device this is the unique identifier for that device. **This is how incoming transaction data from a card reader will be matched up to this machine.**
- Type (optional) – What type of machine is this.
- **Model** – Model of machine. This is optional but it is used to figure out how to map coils in your eData (electronic data coming from a card reader) to the coils in your machine if

that eData is not already mapped. (See Raw Coil vs Mapped Coil in the Loading eData from your eDevice in this guide for more detail.)

- Purchased – Date the machine was purchased.
- Price – Purchase price.
- Purchased From – Where it was purchased or from whom.
- Active – Is this machine still a viable active machine, even if it is in storage it can still be active. Active is a way of deleting the machine without actually deleting it. By making it inactive (uncheck the box) it will not show up for example in drop down lists where you could pick a machine for locating. **The only time you would really inactivate a machine is if you disposed of it but did not want to delete it yet from your cloud.**
- Notes Tab – an area to keep notes about this specific machine. These notes stay with the machine no matter how many locations it may be placed at.

Click the Save button at the bottom when you want to save the machine. The detail window will close and you will see the change show up in the search list.

## Deleting Machines

Use the Delete button on the Machine List screen to remove a machine or the Delete button in the Edit Machine detail screen. This will delete any history associated with this machine and unlink the machine from any eData (Data loaded from your card reader) that had linked to it and remove it from your VMS cloud. This is fine to do if you need to remove the machine from your system and leave no trace of it.

## Adding Products – Step 2

You can control what shows up in your drop down lists using the Edit buttons beside them.

Each 'Custom' screen that opens when you click its edit button allows you to control your own items to display in the drop down. Any item that is 'Active' will show in its respective drop down list. There may already be system items added for you in some of the drop downs. These you cannot change.

Adding Products is pretty much the same as adding anything else... From the Product List click the [+] button in the search bar or click the Add Product button in the button bar to open a blank Add Product edit screen

- Name (required) – it's usually easier to name your products than it is to name your machines.
- **Category** (optional) – this is just a way to categorize your products. You could create categories like Organic, Kosher, Gluten Free, Sugar Free, Junk Food as an example.
- **Storage Type** (optional) – this is a way to define how you are storing your product for inventory purposes. To make things easier I recommend you always create and use things that represent a single item like 'Bag, Bar, 16 oz Bottle, 12 oz Can, etc' and avoid using storage types like 'Ounces, Cases, Pounds' – Storage Types will be utilized in the Inventory module to track your product storage area.
- **Tax Types** (optional) – for managing sales tax and defining the tax type for a specific product which determines what rate will be used. (See Sales Tax section for more detail).
- Active – by now you get the idea behind these active check boxes... this is a way of inactivating a product so it doesn't show up when you create a new template or add product to a machine but you still have it in your Product list – a way of deleting it without actually deleting it.
- **Finding Locations where Products are being used** – When you click this button (once you have placed machines in a working location) Toucan will go out and scour through your Working Locations (Locations that have a Machine placed at them) and find all of the Locations vending this product, which coil it is in, and if you have a card reader, Toucan will tell you what the current level of that product is in that coil (machine inventory). This is handy for product recalls or product expiration situations. (Screen example on next page)

Location	Machine	Coil	Level	As Of
Abbots Sports Lounge	Abbots Sports Lounge	A2	0	8/19/16 21:22
Brooke's Pet Shop	HY008	E1	10	9/4/16 00:26
Costco	HY006	E1	10	8/9/16 00:00
Durfrain Law Office	Durfrain Law Office	A2	6	8/20/16 23:59

Unlike most other detail windows in Toucan, this 'Locations Vending' window can be opened multiple times for different products. In other words you could leave the Location Vending – Blue Diamond Almonds window open while opening up another Product Detail for Apple Chips, click on Show Working Locations for Apple Chips and now you have two windows open, one showing the Locations vending Almonds and one showing the Locations vending Apple Chips. You might need to click and drag one over a little bit so you can see them both since one might be on top of the other when it opens. Click the window's title bar and drag it to move it around. You can open as many of them as you need. They will always stay on top but you can leave them open while you open a Working Location and actually go into one of the locations vending that product.

**Unused Products** On the Product List you can use the Show Unused button to retrieve a list of any products in your Products List that are not currently being used in a machine anywhere or a machine template.

**Deleting Products** You just use the delete button next to the product you want to delete on the Product List, or the Delete button on the product edit screen. *You may not delete a product if it is being used somewhere in a machine or template, so you will need to replace it with something else first and then delete it. You also can't change or delete the –EMPTY– product.*

## Machine Templates – Step 3

	Coil	Product	Price	Full Level	Low Level	
<input type="checkbox"/>	110	Miss Vickies Jalapeno	\$1.75	7	2	▲
<input type="checkbox"/>	111	Popcorners spicy queso	\$2.25	7	2	
<input type="checkbox"/>	112	Skinny Pop Original	\$2.50	7	2	
<input type="checkbox"/>	113	Veggie Straws Ranch	\$1.75	7	2	
<input type="checkbox"/>	114	CheezIT Snpd Chdr Sr Crm	\$2.50	7	2	
<input type="checkbox"/>	120	Belvita snk pk cnm brwn sgr	\$2.75	7	2	
<input type="checkbox"/>	121	Wafer Bauducco Choc	\$2.50	7	2	

Machine templates are a great way to re-use data and make things quicker in the virtual world. It can be tough enough to physically load products into your machine so Toucan makes it as easy as possible to document what products you have and where you have put them in your machines.

There are a couple of 'Empty' Templates already created for you for some of the Seaga machines that HealthyYOU distributes, with and without the entree unit. It is recommended you leave those 'Empty' templates alone and just copy them (you can copy them from their edit screen using the 'Copy Template' button) and make changes to the copy you create by adding products and prices to create your own templates. In this regard you have a Template for creating new Templates... a template for a template so to speak.

You can create a template from scratch using the [+] or Add Template button from your Machine Template list, or you can modify existing templates by changing data and adding or deleting coils. Just use the delete button next to a coil to delete that specific coil from the template. Use the Add/Insert button to add coils to a template. The new coil will be added directly under a selected or highlighted coil so you can insert new coils in the middle of a template if needed. This allows you to create templates for any machines you might add to your business in the future.

When you want to save your changes back to the cloud, click the Save button at the bottom. The Delete button at the bottom will delete the entire template, just like the delete button on the Template search list. Cancel of course cancels any changes and closes the window without saving. The Active check box is again, another way to delete something without actually deleting it from your cloud, just like on the Machine detail. If a template is inactive it will still show up in your template list, but it won't show up as an option for when you locate a machine.

Machine Templates are intended to be used when you initially locate and setup a machine in a working location. They let you define the coil, product, product price, full level, and low level amount for each coil you create. So you could have an 'Initial' template, a 'School' template, a

'Gluten Free' template, 'Organic' template, etc... Create as many templates as you need. Then when you place a machine at a location and create a working location you can pick a template (as long as it's active) to use for that machine and that will load all of the coils, products, capacities, and prices for you which is better than doing it for each individual coil each time.

This is a one and done sort of operation and the template is not connected to the working location. Once you use the template to initially setup the working location that working location is independent of the template; you can change the coils in that machine directly for that working location and it won't affect the template and vice versa, any changes to the template will not affect any working locations that used that template to get setup. You can re-use the same template over and over again when creating other working locations. You can also refresh a working location with a different template later on using the Template Refresh button on the working location service screen (see Template Refresh).

You can always change the individual coils in a working location directly so if a template has 90% of what you want, just use it initially and then you can tweak the coils you need for that specific machine. For example if you always set the snack portion of a machine up the same way for an initial placement but you vary the drink section, you could create a template with the snack section the way you want it and leave the drink section as empty coils so you can tailor it when you actually fill the machine. Templates are here to make things easier for you so use them in any way that makes it easier and faster and makes sense for you.

When you Add a new template or make a copy of another template to modify it. Just give the new template a name. Then use the Add/Insert Coil button to create additional coils anywhere in your template. The delete button will remove a coil. Click in a cell to edit the contents of that cell. Clicking in the Product cell will give you a drop down list of all your active products from your Product List screen. Product Price allows you to set the price for a product. Full Level is the amount of product you consider the coil should have in order to be full. It does not have to be the physical coil capacity. If a coil holds 20 products but you consider that coil full with just 12, you can set your Full Level to 12. Low Level is the amount of product that triggers the machine or coil to turn red in the software when the product level drops at or below the low level amount and can also generate an email or text alert with the Enterprise version. For an example of how machine templates work see the 'Using Machine Templates' in the Placing Machines section.

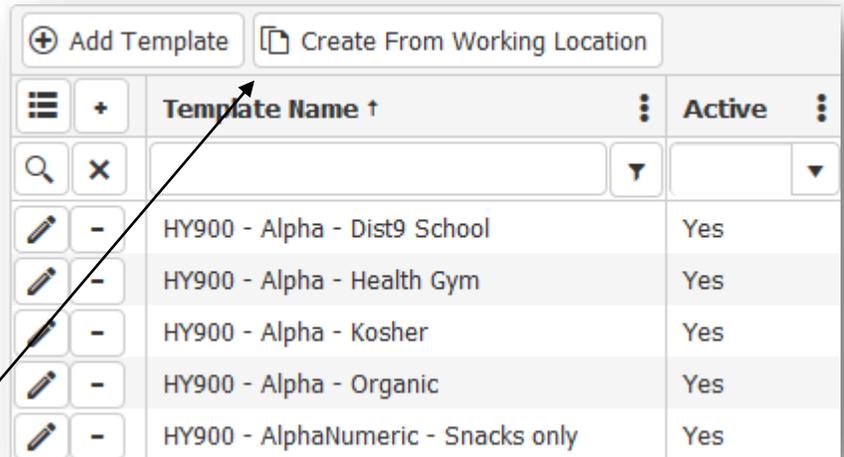
The screenshot shows the 'Add Machine Template' interface. At the top, there is a text input field for '\*Name:' containing 'Organic Products'. Below this are three buttons: '+ Add/Insert Coil', 'Copy Template', and 'Print List'. The main area is a table with columns: Coil, Product, Product Price, and Co. The first row is highlighted in blue and contains 'A1' in the Coil column, 'Apple Slices' in the Product column, and '\$0.00' in the Product Price column. A dropdown menu is open for the 'Product' cell, showing a list of products: '-EMPTY-', 'Apple Chips', 'Apple Slices', 'Bargs Natural Root Beer', 'Blue Diamond Almonds', 'Bugles', and 'Cappuccino'. The 'Apple Slices' option is currently selected. There are also minus signs in the Coil column for each row, indicating a delete function.

## Create a Template from a Working Location

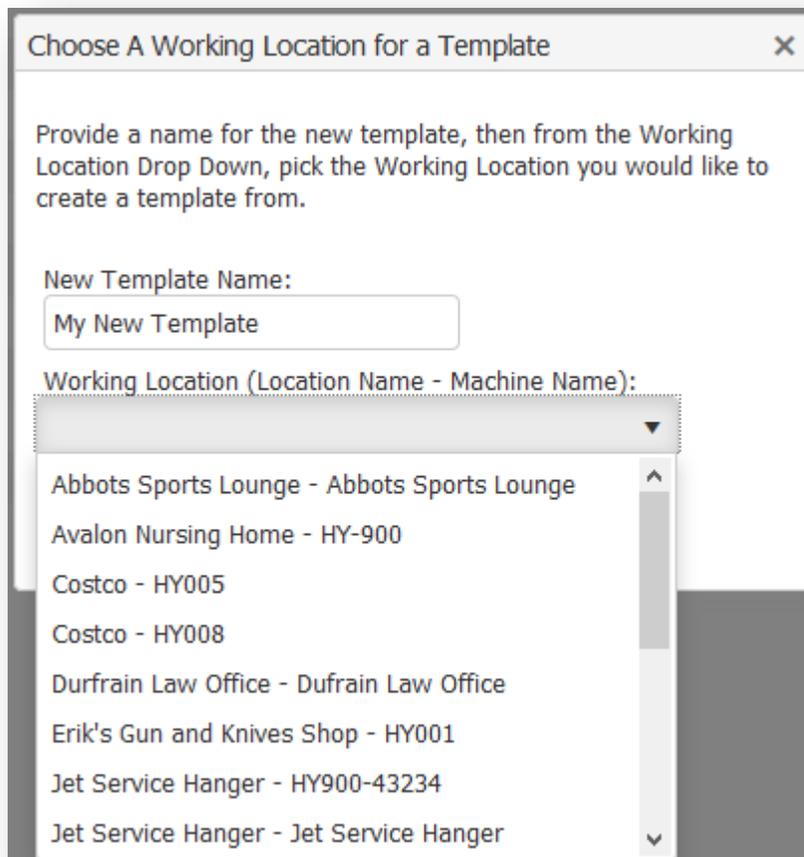
If you have placed machines and created some working locations you can use those working locations to create additional machine templates. Because the working location can move independently from the template that was used to initially set it up, sometimes you may get a really good combination of products in a working location that you want to generate a template from.

You can do this using the 'Create From Working Location' button on the Machine Templates list

screen. When you click the button you will be prompted with a dialog window to choose a Working Location from which to create a new template. Fill in a name for the new template, use the drop down to pick the working location you want, and click the Create Template button and the new template, using the coils from the working location, will be created in your Machine Template List.



+ Add Template		Create From Working Location	
☰ +	Template Name ↑	⋮	Active
🔍 ×		▼	▼
✎ -	HY900 - Alpha - Dist9 School		Yes
✎ -	HY900 - Alpha - Health Gym		Yes
✎ -	HY900 - Alpha - Kosher		Yes
✎ -	HY900 - Alpha - Organic		Yes
✎ -	HY900 - AlphaNumeric - Snacks only		Yes



Choose A Working Location for a Template

Provide a name for the new template, then from the Working Location Drop Down, pick the Working Location you would like to create a template from.

New Template Name:  
My New Template

Working Location (Location Name - Machine Name):

- Abbots Sports Lounge - Abbots Sports Lounge
- Avalon Nursing Home - HY-900
- Costco - HY005
- Costco - HY008
- Durfrain Law Office - Durfrain Law Office
- Erik's Gun and Knives Shop - HY001
- Jet Service Hanger - HY900-43234
- Jet Service Hanger - Jet Service Hanger

## Adding Locations

Things really begin to pick up when you start to get locations and physically start placing your machines, this is when the rubber really hits the road and things begin to actually fall into place. Locations fall into two categories; Working Locations, where you actively have machines placed or just locations where you don't have machines placed. Examples of just locations could be past locations where you used to have machines but you have since pulled any machines out – you may not want to delete these locations from your Location List yet because you want to keep the history for a little while longer so they are still in your Location List but they are no longer Working Locations. Or you know you are going to be placing a machine at a location but you are not sure which machine it is yet, you can still create the location in your Location List it's just not a Working Location yet. But no matter what category a location falls into it must first be added to your cloud in your Location List before it can be anything, so this is how to add a new Location so it is in your Location List.

**Edit Location** [X]

\*Name:       Locator:

Contact:       Date Found:  [Calendar Icon]

Days Of Business:        Active  
(Days Of Biz)

Address	Phone	Notes	Sales Tax
Address 1: <input type="text" value="1677 D St"/>			
Address 2: <input type="text" value="JB Andrews"/>			
City: <input type="text" value="Maryland"/>		State: <input type="text" value="MD"/>	Zip: <input type="text" value="20762"/>
County: <input type="text"/>			

[ - Delete ]      [ ✓ Save ]      [ X Cancel ]

You probably know the drill by now... Start by going to your Location List and click the [+] button in the search bar or click the Add Location button in the button bar to open a blank Add Location detail screen.

*(Yes, my screen above does say Edit Location but yours will be blank and say Add Location if you clicked the Add Location button). I opened this one by clicking my Edit button as an example of some location information so you could see it. The only thing required is a Name.*

The Contact, Locator, Date Found, and Days of Business are all optional fields that you can use as needed.

- Phone Tab – allows you to have multiple phone numbers for a single location. Just enter the number, pick a type and you can use the 'Main' check box to indicate that this number is the main number to use. The Main number will show up in the 'Main Phone' column in your Location List and will show up on other reports.
- Notes Tab – this is an area where you can keep notes about a location, what products they prefer, any allergy info or just general notes.
- Sales Tax Tab – This allows you to define the different tax rate(s) and when they are effective for each tax type you create for this specific location. (See Sales Tax section for more detail)

Once you have entered the information you want to save just click the Save button at the bottom right of the window to save it to the cloud. Once you have a Location in your Location List it can now be used to create a Working Location and place any number of your machines there.

## Deleting Locations

The delete button, either on the Location List screen or on the Location Detail screen will of course delete the location and any history attached to it as well as unlink any eData (data loaded from your card reader) records that had linked to that location. Hence the 'Active' check box to the rescue allowing you to inactivate a location and keep it but not actually delete it into oblivion until you are ready to remove it from your VMS (Vending Management System).

## Placing Machines – Creating Your Working Location List

Once you have created at least one location in your Location List and you have some machines in your Machine List and Products in your Product list you can put these things together to create a Working Location – a Working Location is just a location that has a machine on site. The Location List can include all past present and future locations, while the Working Location List is just your current locations with machines.

Your Working Locations list is the place in Toucan where you locate and un-locate machines, document what products are in a machine, and record services made to those machines when you go out and re-stock or fill them. You can also use Toco when filling a machine and when you save the information in Toco it will update the information here in your Working Location detail area of Toucan. You can have several 'helpers' in the field using Toco while you watch what they are doing with Toucan.

To locate a machine you start at your Working Location List and click the [+] button in the square group of 4 buttons in the search bar or click the Add Working Location button in the button bar.

+ Add Working Location		Export to Excel			
☰ +	%Full	CshSinceSrv	Location ↑	⋮	Machine
🔍 ✕				▼	
📄 🔄	63 %	\$17.35	Abbots Sports Lounge		Abbots Sports L
📄 🔄	64 %	\$62.50	Avalon Nursing Home		HY-900
📄 🔄	90 %	\$0.00	Costco		HY005
📄 🔄	98 %	\$0.00	Costco		HY008
📄 🔄	69 %	\$26.50	Durfrain Law Office		Durfrain Law Of

If you have any working locations they will show up in your list, otherwise your list will be blank.

There are 2 computed columns, a %Full and CshSinceSrv (Cash since last service) column that Toucan will fill in for you. %Full is the Percentage Full of the machine based on the current inventory, computed from the eData loaded so far, in concert with the service history you have entered and the 'full' capacity of the machine that you set using the Full Level of each coil. These 2 computed columns are not searchable like the other columns in the working location list.

CshSinceSrv is the amount of cash (Paper and Coin) that has gone into the machine since the last time it was filled/serviced. This is based on the eData loaded so far and the date/time serviced you enter when you record a new service/fill. Since some of the coin will go into the change tubes, the amount of paper and coin you pull out of the machine (Cash Collected) could be a little different than the amount that is reported by the ePort.

The **Red** color indicates that at least one of the products in the machine is at or below its Low Level amount that you have set. Even though a machine is at a high percentage full, it could still have one of its coils go low. To see which product is low, click the service button to open the New Service screen and the low product(s) will show in red in the coil list. Or use the Low Product report under Remote Monitoring to see all low products across all machines.

When you click the Add Working Location button a blank Add New Working Location screen opens and you use the two drop downs (Location and Machine) at the top to pick the Location and the Machine you want to go at that Working Location. The Location drop down list will only show you Locations that are active (have their active check box checked). The Machine drop down list will only show you active machines that are not currently located somewhere else, so if

you have a machine that is not showing up, you may have to unlocate it from its current location first, or you may need to check and make sure it's active box is checked on its Machine Edit screen. Pick the same location multiple times if it has multiple machines on site to create multiple rows for that location in your Working Location list.

When you pick your Machine you will get a prompt to choose a Machine Template

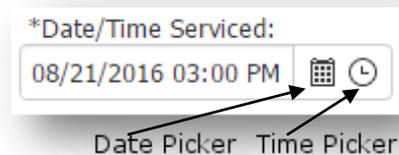
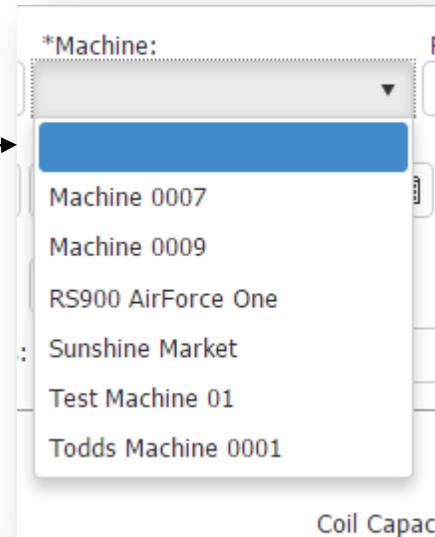
**Using Machine Templates** - Templates are meant to make the initial setup of a working location quicker and easier. When setting up a working location Toucan will take the Coils, Products, Prices, and Capacities from the template you choose and load that data to the Machine you pick. Two other options you have is to pick – **PREVIOUS LOCATION**– from the template drop down list and if the machine you are locating was previously located somewhere else, Toucan will use the products and information that were in the machine previously to populate it at this new location. Or you can **Manually select the number of empty coils** to build into the machine and then you can manually configure the machine yourself.

Templates are only used initially when you create a working location. After that the working location is independent from the coil and you make any coil changes directly to the working location in the Coil Detail area (see above image) that you need to. Templates are an easy way to quickly load the coils and setup your working location when you create it.

**If you pick the wrong template** and you notice that those are not the products that you intended to put in the machine, but you did pick the correct machine, you can reset the coils. Just go back up to the Machine drop down and pull it down and click the blank area at the top of the drop down list. This will blank out the machine and clear the coils area. Then just use the drop down to pick the machine again and you will get another chance to pick a different template. If you picked the wrong Machine or Location, just use the drop down and pick the correct one and this will also reset the coils area.

Location and Machine are two of the three required fields so once you select them the only other required field is

- **Date/Time Serviced**, for the first time the machine is placed this will be the date and time you setup or placed the machine, for subsequent services it will be the date and time when you go back and service that machine. **You do need to enter the time** so that your data from your card reader will merge correctly with the times you fill the machine. If the machine does not have a card reader, the time is not as critical.



Optional Fields for the entire machine

- **Route** (coming soon) - Routes are a way of organizing your machines into groups. Maybe you want to service some machines at the same time you service others. You could put these machines together on a route
- **Frequency** is how often (in number of days) you want to check on this machine. In reality you will not know exactly how often to visit this machine until you get a feel for how much it gets used, so you can just start with 7 or whatever you would like – this is used to compute the
- **Next Service Date** which is for documentation purposes just so you have an idea of when you should go out to check on this machine.
- **Date Placed** is where you can document when you first placed this machine so you can refer to it if needed and not have to look back into history to find it.
- **Cash Collected** is how much Cash you took out of the machine, so the first time you place it this will probably be \$0 – but next time there should be some cash waiting for you. Cash collected includes paper and coin. A note about the cash revenue reported by a card reader. It may not exactly match the Cash you collect physically from the machine as some of the coin that goes back into the machine can be used to replenish the coin tubes used to make change.
- **Fill Vends and Fill Sales** are revenue numbers that Toucan will compute for you separate from any card reader data. Toucan figures out the vends and sales by looking at how much product you put in a machine previously and then at how much product you add to it at the next fill, so it can deduce how much was sold and how much it made in revenue. If you have a card reader in your machine and are receiving transaction data

from it, then you should use the revenue numbers reported from the reader that Toucan compiles for you and the Fill Vends and Fill Sales that Toucan computes will just be additional information for you. For a more complete description see the section on 'Fill Vends and Fill Sales Revenue vs. eData Revenue' in this guide.

The upper portion of the Working Location window (Machine Totals) applies to the entire machine, so you only have to enter this information one time and it applies to all of the coils.

**Coil Detail** - The bottom section is where you configure each individual coil. As you click in the Coil List on the left to select a coil the Coil Detail will change to show the detail for the selected coil. Here is where you can modify a coil for a specific machine.

- **Coil** is where you indicate the coil number/letter for the machine A1, B4, C05, etc. Make sure to use the same numbering system as what is in your machine. So if the machine is labeled A1, use A1 (not A01).
- **Product** this is where you use the drop down list to pick the product for this coil, or if you change a product, you pick the new product here as well. Only active products will show up in this list, so if a product is not showing up, check and make sure its active by checking the active check box on the product detail screen.
- **Full Level** is where you indicate how much total product this coil or slot holds when filled to what you consider 'full'. The Amount Added and Service Fill cannot go above your Full Level. This does not need to be the physical capacity of the coil, if the coil physically holds 14 but you consider the coil full with just 8, you can and should change the Full Level to 8. The Fill Machine and Fill Coil buttons utilize this info to do their calculations.
- **Amount Added** is how much product you added to the coil when you stocked it (for the first machine service/setup, since the coils are probably empty, the Amount Added and Service Fill will be the same number).
- **Service Fill** is the total amount of product in the coil when the machine is closed after a restock / service fill – so the sum of the Amount Added and what was already left in the coil if any. If the coil was empty Amount Added and Service Fill will be the same. *Service Fill is what will reset the eData Levels and Machine Inventory for the coil.* Any eData (data from your card reader) transactions that come in after the Date/Time Serviced will now use the value in Service Fill to start counting down and Toucan will use this data to determine machine inventory.
- **Previous Fill** is populated for you. When you record a new service Toucan will use what the previous Service Fill value was and move it for you into the Previous Fill field.
- **Low Level** is the Low Level amount for this coil that you set. When a coil reaches its low level amount the Machine will turn red on the working location list and the coil itself will turn red in the coil list on the left.
- **eData Level** is the level of product computed by Toucan at the point in time you pick in Date/Time Serviced – you cannot edit this field. The date the product was at that level will show just below the eData Level field. Toucan uses your historical service entries you enter along with the data from your card reader (eData) to compute this value. You control what this value gets set to via the Service Fill field when you save a machine service. All eData Levels are set to the value of the Service Fill for their coil every time a new service record is saved. So if the Service Fill for A1 is set at 7 when a service is saved on 7/1/24 3:30pm then the eData Level for A1 is also set to 7 for that same date/time, if C8's Service Fill is set to 12 in the same service, then the eData Level for C8 will be set to 12 as well. Toucan will now use these new values as subsequent eData transactions are processed and will continue to use them until another service (maybe on 7/14/24 5:00pm) is entered which will reset the eData Levels and Machine Inventory back to the new Service Fill values entered and saved on 7/14/24 5:00pm.

For Toucan to remotely monitor your machine inventory you need to give it a starting point with each service by setting the Service Fill for each coil. Because neither the machine nor the ePort knows this information, only you do. This is easy if you filled all the coils to capacity (or mostly filled them) when you placed the machine or when you go back and service it you can just click the **Fill Machine button** and Toucan will go through and set the Amount Added and Service Fill for you for each of the coils based on the full level. You can then go through and double check Toucan and change any of the data if needed before you save the service (remember you are not allowed to enter more for Amount Added or Service Fill above what the Full Level is, so if you need to add more to a coil and can't, you may have to increase the full level first).

When you are done getting the machine and coils all set, click Save at the bottom and that creates the new Working Location and adds it to your list so that eData that comes in for this machine (identified via the eDevice Id in the Machine Edit screen) can now match up and link with something as it is loaded. This also starts and creates the Service History for this machine.

## Basic Steps to Place a Machine

So the basic steps to adding a working location or placing a machine are:

1. Click the Add Working Location to open a blank add working location screen
2. Pick the Location and Machine from the Drop Downs
3. When you pick the machine Toucan will let you pick a template to initially load the machine with products, pick a template that has most or all of the right products setup
4. Once the coils are loaded, enter the Date/Time Service as the date you placed the machine before any vends took place.
5. Go through the newly loaded coils and adjust them to what is accurately in that machine if needed. Use Fill Machine or Fill Coil buttons to make it faster.
  1. Change the Product or Price if it differs from the template that was used.
  2. Make sure and set the Amount Added and Service Fill for each coil so its accurate. For this you can use the Fill Machine button to fill them all up and then go back and change what you need to
6. Once The Date/Serviced and Coils are all good - click the Save button and Toucan will begin the Service History for this working location.

**Placing multiple machines at a single location** – All you do is create another working location for the second or more machines and pick the same location from the location drop down for each of the subsequent machines. You will get a working location for each machine at the same location and each will have their own service history, which is exactly what you want. You do NOT need to create several location records of the same location.

## Servicing/Filling Machines – recording a new fill on working locations

To service a machine after it has been placed is almost the same thing as placing one except you have less to do in Toucan when you do a service so it's faster. Instead of adding a new working location with the add button you click the service button next to that machine in your working location list and the New Service window for that location will open up. Prior to leaving and servicing a new machine you will probably want to run the **Machine Inventory report** under Remote Monitoring to see what the product levels in the machine are so you can do your pre kitting. Or use the **Low Product Report** to see what products are low in all of the located machines. Both of these reports are available using Toco as well on your phone.

The New Service window retrieves all of the data you saved previously; this means you won't see any changes showing up on this window until you change the Date/Time Serviced (except the eData Level – it can change). The Location Drop down and Machine Drop down are now disabled (ghosted) and can't be changed once a machine is placed. To move a machine you

have to unlocate it first and then you can use it in a different Location by creating a new working location with it.

All of the previous Cash Collected, Fill Sales, Service Fill, Amount Added, etc... will be what you previously saved. The eData Level (a computed product level) will show the product level for each coil as of the date/time shown below it. Toucan waits until you enter in a new Date/Time Serviced – then it initializes this screen for a new service. If you don't change the service date, Toucan will think you are adding or changing data for the previously saved service. So the first thing to do for a new service is enter the new Date/Time Serviced for when you filled the machine.

If you have to change something to correct it for the previous service you can. As long as you don't change the service date/time your service history will be updated with your change and a new history will not be created. Any time a service is saved Toucan checks, and if that Date/Time Serviced already exists in your history, the data being saved is used to update the existing record (so you can make corrections). New Date/Time Serviced dates are seen as a new service and that data is inserted into your history and merged with eData transactions which then build your complete Service History.

So... to record a new service/fill on the New Service screen start by entering in the new Date/Time Serviced (this is the date and time you were actually at the machine and filled it), the time doesn't need to be exact, just a time when you were there and no vends took place. This is the first thing you should do, enter the date. As soon as you change the Date/Time Serviced ... all of the coils will reset and you will see the new changes as the Service Screen is initialized.

If you change the coils first and then set the Date/Time Service, Toucan will re-initialize the screen and you could lose what you entered. So do the date first and then the rest of the data.

When the screen initializes – the coil detail will be reset. For each coil the **Amount Added** will zero out, the Service Fill will move to Previous Fill, and new **Service Fill** or Service Fill will be updated to the eData Level that Toucan computes for that point in time you selected as the Date/Time Serviced based on the previously saved service and the eData that has been loaded so far. Any previous **Cash Collected** and the total Fill Vends and Fill Sales for the machine will zero out. This is ok because all of that previous data is saved in the Service History.

The new Service Fill (Service Fill) and eData Level for each coil will be the same at this point and the Date/Time serviced will be the same date shown under the eData Level field. This will not be what the most current eData Level is, but rather the eData Level as of the date and time you enter for your Date/Time Serviced. As you change the Date/Time Serviced Toucan works hard to dig through the history and figure out what was the level of product (machine inventory) for every coil at that point in time that you select in Date/Time Serviced. It has to do this to keep things as accurate as possible since you may be filling in this service information at your computer several days after the actual date that you did the service and there could be new eData from your card reader that was loaded since filling the machine. So the software will look back through the history using data you entered on prior service entries and the eData currently loaded to figure out what was in the machine on that date and time that you enter and Toucan resets the eData and Service Fill to those amounts. That is why nothing changes until you change the Date/Time Serviced – Toucan is waiting for the new service date and time so it will know when it needs to look for its inventory computations.

**Service Example**, say you serviced a machine on 7/20/24 and you recorded that service in Toucan (or Toco) the day you did it, and then you went back on 8/1/24 to fill the machine again but you had to wait to enter that service info until 8/8/24 because you just got too busy, something you don't normally do but this time things were hectic. If you tell Toucan that you added 5 Cliff Bars (in Amount Added) to B4 on 8/1/24 at 2:00pm and it is now 8/8/24 when you are filling in the service info and you have also loaded eData up to 8/8/24 Toucan knows that it cannot use whatever the current eData level is for B4. First of all it does not know that you filled that coil up on 8/1/24 at 2:00pm because you haven't even saved this service entry yet. The last thing it knows is that you serviced this machine on 7/20/24 at 7:00am and since then you have been adding your card reader data every day, just haven't added your service data. So on 8/8/24 it could look like B4 is empty since more vends for that coil could have come in and loaded in the eData since 8/1. So Toucan will not use what the most recent eData level is.

Instead it will dig back through all of the service data and eData and figure out that since you filled that coil on 7/20/24 at 7:00am it had 7 Cliff Bars in it at that time, because that is what you set the Service Fill to be for B4 on that date/time. Then looking through the eData it sees that 1 vended on 7/25, 2 vended on 7/29, and 3 vended on 8/1 - but of those 3 vends on 8/1, 2 of them vended in the morning and 1 vended at night (5:00pm). It is now 8/8/24 and you are telling Toucan that you were there on 8/1/24 at 2:00pm, so at that point in time there were actually 2 Cliff Bars left in the coil. If you told Toucan that you were there on 8/1/24 at 6:00pm, it would figure out that there was only 1 left at that point in time (because of the vend at 5:00pm).

Anytime you change the Date/Time Serviced on the service window, Toucan and Toco go through this process for every single coil in the machine to figure out the eData Level (machine inventory) for that specific point in time. It's a lot of work... but that way when you tell it that you added a certain amount to a coil on a certain date, Toucan can more accurately calculate what the Service Fill truly should be based on how much you added. That Service Fill that gets saved is what it will use going forward working with the incoming card reader data (eData) to then figure out what the machine inventory is whenever you ask for it, so that it can tell you what is left in the machine when you need it before you head out to fill it again. So each service entry you record will reset those eData levels and Service Fills that are used when the subsequent eData is loaded.

And as you go through each of the coils and enter the amount added, the new service fill gets computed and the fill vends and fill sales for the coil get computed as well as a total for the entire machine showing in the top Fill Vends and Fill Sales fields. If you filled the Machine back up to capacity you can click the Fill Machine button and Toucan will do it all for you since it can figure out what was in that coil at that point in time. It knows the capacity you have set for the coil, so it can figure out how much you must have added to fill that coil back to capacity (back to full). The Fill Coil button does the same thing, but just for that specific coil you have selected.

So for our 8/1/24 2:00pm service if we click Fill Coil for B4, Toucan figures out that 2 Cliff Bars were left at that point in time and the coil has a capacity of 7 therefore, we must have added 5 Cliff Bars and since each bar is priced at \$1.75 it means that for B4 our Fill Vends are 5 and our Fill Sales are \$8.75. Then it aggregates this coil info into the total Fill Vends and Fill Sales for the machine at the top. Clicking Fill Machine is just like going through every coil and clicking the Fill Coil button for each one.

If you filled everything back up in your machine except for just a few coils because maybe you didn't have that product with you, you can still click Fill Machine and then just go back and change the few coils to what they should be before you click the save button and save the service.

Now you are done and you check your data, it looks good so you click the save button for this 8/1/24 2:00pm service and Toucan goes to save your service data to the cloud and notices that there is eData up to 8/8/24 so now it knows it is going to have to do some more work before it can save this service. All of the work that Toucan has done in loading that card reader data since 8/1/24 and figuring out machine inventory values for you needs to be undone and thrown away, it's no longer accurate. Because when Toucan loaded any eData for this machine after 8/1/24 it did not yet know that you had gone out and filled it because you hadn't saved that info yet to tell it. Toucan doesn't complain or squawk it just backs out all of those eData transactions from 8/1/24 to 8/8/24. Then it saves the 8/1/24 2:00pm service info and creates the new service record in history, then it goes back and re-works all of the calculations for every coil like it had done before to load that card reader's eData from 8/1/24 to 8/8/24 but now it can use the 8/1/24 2:00pm service info you just saved so that it can re-compute what the current machine inventory is accurately and merge the service you saved with the eData transactions in your Service History. Both Toco and Toucan do this check every time you save a service and re-do all of that work if needed.

## Basic steps to record a new Service/Fill

So Toucan is doing a lot of things behind the scenes for you. The take away is... all you really need to do when you record a new service fill is...

- 1) Enter the new Date/Time Serviced when you were there at the machine and filled it. Always do this very first thing. *Toucan will reset the screen for you zeroing out fields for each coil and computing the new eData and Service Fill levels for all the coils to set the product level and inventory as of that date and time you enter using the previous service history and eData that has been loaded thus far.*
- 2) Enter in what product you added to the coils or changes you may have made to them.
  - a. Either click Fill Machine to fill all the coils in the machine back to capacity or...
  - b. Edit each coil you filled in the machine. In the Coil Detail section record the Amount Added for the product you added to a coil (Toucan will figure out the new Service Fill), or pick a new product from the drop down if you replaced the product, or enter a new price if you changed the price etc... *If Toucan computes anything like the Service fill incorrectly – just over ride it with the correct info.*

Since Toucan set the Service Fill for all of the coils when you changed the service date/time all the Service Fill values should be what was in the machine at that service date/time – so you only need to update the coils that you actually made changes to and you can leave the other

coils alone if you didn't add any new product to them. If you did a quick fill and only filled 5 of the coils in the machine, then you only need to update those 5. All the others should be reset with the correct service fill already.

If you mostly filled the machine but didn't fill all the coils, you can still use the Fill Machine button and then go back and adjust the few coils that maybe you didn't fill all the way so their service fill is correct.

**To reduce existing product in a coil** – This is if you want to take out some of the product but not all of it from a coil. Maybe you are moving some to a different machine. Pick the coil in the coil list. In the coil detail leave the Amount Added at 0 and change the Service Fill to the amount of product left in the coil when you were done servicing the machine and had removed some of the product from that coil.

**To replace product** – To replace a product just pick that coil in the coil list. In the coil detail use the product drop down to pick the new product. The Amount Added, Service Fill, should be at 0, just change them to the new Amount Added and new Service Fill for the new product. Change the product price and set the Low Level amount for the new product if needed.

**To change a product price** – In the coil detail for that product, just change its price. This will not however change the price of the product in the machine, you need to make sure and configure the machine for the new price.

**Color Coding in the Coil List** – In the coil list you may notice some color changes. **Bolded** products mean that you have changed something in the coil detail for that coil. This can happen if you actually change something or if you push the fill coil or fill machine buttons that cause a change to happen for that coil. **Red** means that the Service Fill is at or below the Low Level amount, or that the eData Level is at or below the Low Level amount before the Date/Time serviced is changed.

Record New Service/Fill For HY008

Coil	Product
A1	Apple Chips
A2	Blue Diamond Almonds
<b>A3</b>	<b>Bugles</b>
<b>A4</b>	<b>Apple Slices</b>
<b>A5</b>	<b>Cheetos</b>
B1	Cheez It
<b>B2</b>	<b>Chex Mix</b>
B3	Chocolate Pretzels
<b>B4</b>	<b>Granola Bar</b>
B5	KIND Dark Choc Cherry
B6	Doritos
C1	Fruit Roll Up
C2	KIND Cranberry & Almond

The most import info you want to make sure is accurate is the date/time of the service and the service fill for the coils. That is how Toucan knows when and what the new base line for the machine inventory is. Then it can accurately track the inventory remotely as new eData transactions are loaded. **If you don't care about tracking your machine inventory, then you don't need to worry about the service fill, only the Date/Time serviced is needed.**

### **Adjusting, adding to, or Fixing a recent Service Entry**

If you save a service and then realize you made a mistake; or maybe you used Toco to record a service but you didn't want to stand at the machine and count the cash while people walked past so you did everything else but didn't enter the Cash Collected and now you want to. Or you

have helpers using Toco and servicing the machine and you don't want them counting cash so you just have them bring it back to the office where you count the cash, but you still want that to go on the service record they saved. Whatever the reason, if you find you want to update an existing service record with additional info or fix something you just saved, if it's the most recent service, **you can go right back into the Service screen for the Working Location you want to fix and just don't change the service date. Leave the service date as is** and make the changes you want to make and then re-save the changes. Toucan will see the service date has not changed and it will find the same service in the service history and apply the change to the existing history instead of creating a new history. If the date gets changed and Toucan can't find that date in the history it thinks it's a new service and creates a new history record for it. If you find that you made a mistake several services ago or you need to go back and change something several services ago, then see the section on 'Fixing Data Entry Mistakes and Service Histories'

### **Template Refresh – Reconfiguring coils in the machine or Adding/Removing an Entrée Unit.**

If you want to use a machine template and reconfigure or change the coils in the working location with a different machine template, like if you add or remove a smart mart or entrée unit, you can use the Template Refresh button on the Service screen of the working location. This will open the 'Choose Machine Template' Dialog so you can pick a new template that has the new coil configuration you want. After you refresh with a new template, any new products that were not already in the coils of the machine will have their Amount Added and Service Fill set to 0, if the products were the same between the new template and the working location those values will stay the same. So before you save the service with the refreshed template, go through the coils and make sure the Service Fill is correct to keep your machine inventory accurate. Remember, you can build a new Machine Template from an existing working location using the 'Create from Working Location' button in the Machine Templates screen of Toucan. So if you don't have a current template of a machine because maybe you have changed out the products in it since it was first placed, create one. Then you can edit that template, add/remove the coils you need and get it the way you want, then refresh the working location to add or remove the new coils in the working location (like when you add or remove an entrée unit).

### **Overall Service Screen Explanation/Summary**

On a daily basis as transactions come in and process (which happens as you load the Trans Line Item files manually that Cantaloupe emails you or if you have the AutoLoad and Cantaloupe sends them automatically) nothing is going to change on this service screen except for that eData Level field. The Amount Added and Service Fill for each coil remains the same and does not change until you enter a new service and change the service date/time.

Sort of think of it like this... The Amount Added and Service Fill fields are showing what the product level was for the date/time that is in the Service Date/Time field, and the eData Level is showing the product level as of the date that is showing just below it. This is why this screen works this way.

**When recording a new service the first thing you would do is change the Service Date/Time because that will trigger the screen to reset.** The system is going to go through each coil first, reset the Amount Added of each coil to 0 in preparation for the new data. At the same time it is going through all of the ePort data loaded so far and using it as it looks at the previous service to figure out what the fill level of each coil would have been for the new Service

Date/Time you enter. That way, it has figured out what those coils in that machine looked like when you first walked up to the machine (also the eData Level is the same as the Service Fill and the date showing under the eData Level is the same as the service date as long as the ePort data has been loaded up to that service date).

Now all you have to do is click that Fill Machine Button, because Toucan has figured out how much was in the coil when you walked up to the machine, it knows what the previous fill was from the previous service, it knows the full level that you have set for that coil so it can figure out the new Amount you Added and the new Service Fill is brought up to capacity (on page 25 in the manual there is a Service Example with more explanation on this screen).

Now the reason that the screen doesn't automatically jump to the current date when you open it and change everything for you (but instead waits for you to enter a new service date) is

1) It doesn't know when you did the new service. You could have done the new service several days ago and you are just now sitting down to enter it, so it can't really guess the date you went to do the service/fill (Toco does when you enter a new fill because it is assuming you are at the machine or close to it when you open the Toco service screen)

2) In case you really aren't making a new service, but instead fixing something on the previous service. Like you discover that you entered an Amount Added wrong or forgot to change a product. **When making a fix to a service you leave the Service Date/Time alone and don't change it. You just fix whatever you need to and re-save it** because you don't want the screen changing anything when you go back in to fix something.

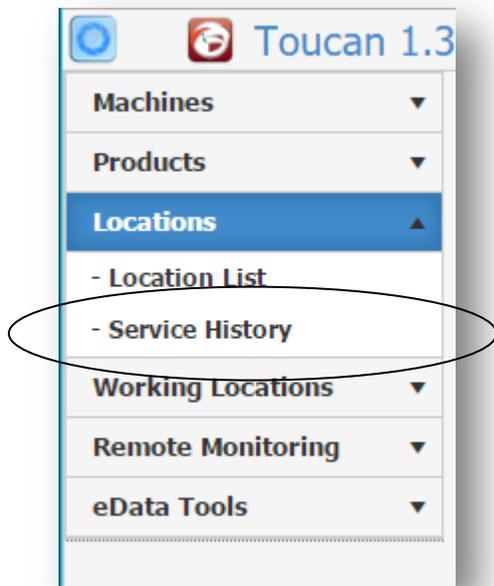
So as transactions are processed that service screen won't change except for that eData Level - and that is showing you the current product level up to the transactions that are loaded so far (which is also that date that shows under the eData Level field)

Using the Service Screen and watching that eData Level is not the best way to see the current inventory in a machine, what it does do though is if the eData Level goes below the Low Level you set, then it turns that coil red in the coil list (and the machine turns red in the Working Location list) as a quick visual cue that something is low.

A better way to see the inventory of each coil is using a report under Remote Monitoring called the Machine Inventory report. You can run that report a couple of ways.

1) Just pick the location and click generate report - it will show you the machines at the location and each coils current level

2) Just pick the location and check the 'Show Vend History' box under the date and then generate the report - that will show you exactly how the inventory was reduced, you will see the last time each coil was filled, what it was filled to (what its current level was saved as for that last service) and each day that data was loaded from the ePort and if there were vends that day or not and how the inventory was reduced.



## Fixing Data Entry Mistakes and Service Histories

Whenever you make changes to a Working Location either with Toucan or Toco, that information gets saved in a history record for you. Whenever eData records are processed from the card readers, that vend information is also saved as a history record for you. This history merges together and builds and builds over time to create the Service History of a machine at a specific location. It also shows the history of a machine as it may have been moved from one location to another or the history of a location as machines may be moved in and out of it and a history of where certain products have been tried. Sometimes we make mistakes and enter the data wrong, pick the wrong product or set the wrong Service Fill when we stocked a machine. There are a couple of ways to fix these kinds of mistakes.

### If it's a mistake on the last entry that you made...

Whenever you save or make a change on the Service screen from the Working Location list Toucan checks the Date/Time Serviced. If there is already a record in your history with that same Service Date/Time, Toucan will update the history row with the new information you are saving. If a Service Date/Time does not exist, Toucan creates a new history row. So one way to fix a recent mistake is by using the Service screen. For example if you just saved a service and later realized that you entered the wrong Service Fill, or forgot to replace a product or change a price, etc. All you need to do is go back to that working location and open the Service window again. Then without changing the Date/Time Service, make the correction that you need to make. As long as the Date/Time Service does not change Toucan will update the history record and reports with the corrections. This is very helpful if you want to record the Cash Collected from a service and you use Toco to save the service, but you don't want to stand at the machine or be in a vehicle counting cash in public so you don't enter the Cash Collected, you just save the service with Cash Collected at 0. Then later in a secure area you can count the cash and use Toucan or Toco to open that last service again and without changing the service date, update the cash collected and save the change. **So to fix the most recent service, just go into the service screen, leave the service date/time as is, make the fix and resave the service and you are done, reports will all update with your changes.**

**If it's an older mistake or incorrect date/time serviced...** If you saved a service fill with the wrong Date or Time then you will have to enter a new service/fill with the correct Date/Time Serviced and Toucan will create a new service history record with the new Date/Time. **This means you will now have an extra record in your history with an incorrect Date/Time Serviced. Not a problem, you can remove the wrong record by using the Service History list, finding the record in the list and then use the delete button to remove it.**

The Service History List is one of the few windows in the software that does not auto-retrieve for you. It will be empty when it is opened and it will wait for you to enter in some query criteria. It does this because over time this history can get very large and if it auto-retrieved every time you opened it you might be waiting a little while for the data to come back. So instead you can be selective and use the drop downs to pick a certain machine or location or even a certain service date for a specific machine. Once you have your location, machine, or other criteria picked in the search bar just click the search button to bring back the history rows that meet your criteria.

You can directly edit any rows in your service history that you have entered or saved. So if the rows came from Toucan or Toco you can edit those records directly using the Edit button. If the record came from a card reader you can view the information, but you cannot change it. Changing it would put you out of sync with your cloud data and the data from the card reader provider.

Source	Location ↑
Toucan	Durfrain Law Office
ePort	Durfrain Law Office
Toco	Durfrain Law Office

Editable data you entered  
View Only from card reader

When you Edit a Service History record from Toucan or Toco, if there is any eData attached and sync'd to that history record you can tell Toucan to ReProcess that data.

Source	Location ↑	Machine ↑	Activity Date ↑
Toucan	Durfrain Law Office	Durfrain Law Office	08/05/2016 12:00 AM
ePort	Durfrain Law Office	Durfrain Law Office	08/09/2016 05:16 PM
ePort	Durfrain Law Office	Durfrain Law Office	08/10/2016 06:45 PM
ePort	Durfrain Law Office	Durfrain Law Office	08/11/2016 11:01 PM
ePort	Durfrain Law Office	Durfrain Law Office	08/12/2016 07:08 PM
Toco	Durfrain Law Office	Durfrain Law Office	08/15/2016 02:00 PM
ePort	Durfrain Law Office	Durfrain Law Office	08/17/2016 10:38 PM
Toco	Durfrain Law Office	Durfrain Law Office	08/18/2016 06:00 PM
ePort	Durfrain Law Office	Durfrain Law Office	08/18/2016 09:57 PM
ePort	Durfrain Law Office	Durfrain Law Office	08/19/2016 11:55 PM

Data from Toucan  
eData attached to it

**Edit Service History**

Coils: A1 Apple Chips, A2 Blue Diamond Almonds, A3 Bugles, A4 Apple Slices, A5 Cheetos, B1 Cheez It, B2 Chex Mix, B3 Chocolate Pretzels, B4 Granola Bar, B5 KIND Dark Choc Cherry, B6 Doritos, C1 KIND Almond & Cashew, C2 KIND Cranberry & Almond, C3 Cheez It, C4 Cheese Peanut Butter Cra..., C5 Cliff Bar Peanut, C6 Cliff Bar Choc Chip, C7 Fruit Roll Up, C8 Energy Bar

Location: Durfrain Law Office    Machine: Durfrain Law Office    Route:

\*Date/Time Serviced: 08/05/2016 12:00 AM    Frequency: 7    Next Service: 08/12/2016    Date Placed:

Cash Collected: \$0.00    Fill Vends: 0    Fill Sales: \$0.00

Comments:

**Coil History Detail**

Coil: A1    Product: Apple Chips    Coil Capacity: 7

Amount Added: 0    Current Fill: 6    Previous Fill: 7  
(Resets eData Level)

Price: \$1.00    Vends: 0    Sales: \$0.00

Buttons: Delete, Save, Save & Resync eData, Cancel

From the Edit Service History window after you make your changes if you choose the Save button it saves the history record and leaves the eData records alone. If you choose Save & Resync it saves the history record and re-processes any eData attached to it. You only need to do a resync if you change something in the coil history detail.

## Moving/Unlocating a Machine from a Location

Occasionally you may need to move a machine or exchange one so you will have to unlocate the machine from its current working location first. To unlocate a machine in Toucan you use the 'Unlocate' or Unlink button next to a Location/Machine combo to unlocate that machine from that location. The Unlocate button is in the same place as the delete button on other screens so it may seem a little

strange to click it. If you hover your mouse over the button it will say 'Unlocate' and not delete. Plus the delete button will always have the [-] sign on it. When you unlocate the machine nothing gets deleted.

The Location, Machine, and all the history stays intact. It

simply removes the machine from that location. Now that machine can be used again at a different location by adding it to the different Working Location (add working location).

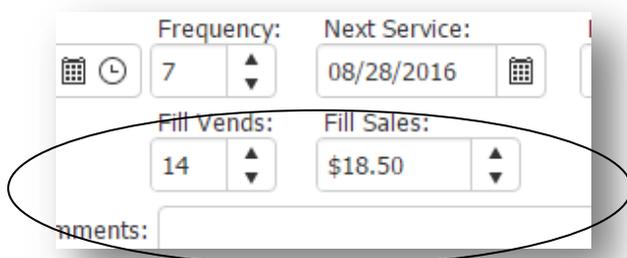


+ Add Working Location		Export to Excel			
+	%Full	CshSinceSrv	Location ↑	Machine	
🔍	✕				
🗑️	⚡	63 %	\$17.35	Abbots Sports Lounge	Abbots Sports L
🗑️	⚡	64 %	\$62.50	Avalon Nursing Home	HY-900
🗑️	⚡	90 %	\$0.00	Costco	HY005
🗑️	⚡	98 %	\$0.00	Costco	HY008
🗑️	⚡	69 %	\$26.50	Durfrain Law Office	Durfrain Law Of

## How do Locations show up in Toco

The working locations list is what appears in Toco under the 'Working Locations' section. Toco is basically a blank route sheet that runs on a mobile browser so you can record a service fill on your phone or tablet while on site. When you save the service, it will save right into the cloud where Toucan can immediately see it. When you are in Toucan anything entered from Toucan shows up in black text (depending on your theme) anything saved or entered in Toco shows up inside of Toucan in blue text. Toco does not allow you to place machines or add product. It is strictly for recording service fills. It does the same work as Toucan when trying to figure out the eData levels at a specific point in time whenever you change a Date/Time serviced and it also works hard to backout and re-process eData that is loaded subsequent to any service fill date that you are saving. So depending on the horsepower of the device you are using with Toco, it may take a few seconds to do a save or to do a 'Fill All' depending also on how much backout and re-work it has to do.

## Fill Vends and Fill Sales Revenue vs. eData Revenue



Frequency: 7    Next Service: 08/28/2016

Fill Vends: 14    Fill Sales: \$18.50

Comments:

If you have a card reader in your machine the Fill Vends and Fill Sales that you see when you edit a working location are really just informational.

Fill Vends and Fill Sales are sales and revenue numbers that are computed by Toucan/Toco based on how much product you are putting back into the machine. In other words, without the card reader data (eData) telling Toucan what vended, the only other way it can figure vends and revenue is when you save a service for a machine and you tell Toucan how much product you put back into the coils. Based on what you put back in the machine to fill it, Toucan figures out how much was sold because it knows how much the coil was filled to previously (Previous Fill) and it knows how much you Added (Amount Added) and you tell it what the new Service Fill is, so Toucan can figure out how much product sold for that coil. However, here is where Fill Vends/Sales revenue can differ from the eData revenue totals. Toucan can only figure what sold if you record that you did something to that coil. If you go to your machine at the first of the month and you do a quick fill so you don't fill everything back up, only the 4 or 5 coils that are almost empty. Maybe Laura Bars in B6 sold 2 but there are still 5 left and you know they are not moving fast so you don't bother to fill B6.

When you record the fill/service in Toucan you probably won't record that you did anything to B6 since you really didn't do anything. What you will do is put in the new Date/Time Serviced, which is at the first of the month, doing this will reset all the coils and Toucan will compute the new eData Levels and set the Service Fill to what it figures out was in the machine at the first of the month. So Toucan figures out that B6 has 5 left (provided you have kept up with loading your card reader data) and sets the Service Fill and eData Levels for you to the levels they were on the date and time you select. But you never touch B6 when you record the fill because you never added any product to it. Therefore Toucan will not compute any Fill Vends/Sales for that coil. You just update the 4 or 5 coils you actually added product to and save the service info and in 2 minutes you are done. This is fine and makes it quicker to do the data entry which is what we are going for. Everything is ok because Toucan reset the Service Fill to 5 for the B6 coil so service fill gets saved correctly and the incoming eData will now work with that number to start counting down and machine inventory will stay accurate. But, the computation for Fill Vends/Sales did not pick up those 2 sales for B6 where the eData Revenue does pick it up. In other words if you were to fill the machine to capacity with every service and fill every coil back up, the eData revenue would match the Fill Sales revenue every time. However, because that is not always reality, the Fill Sales and the eData Revenue can diverge so if you have a card reader, the card reader revenue, computed from the eData transactions coming in, is what you want to go by for revenue purposes.

Now the next time you go back to fill the machine, let's say 4 of the 5 Laura Bars previously left have sold so you are down to 1. Now you fill the B6 coil back up (and you are happy that product is moving) and you put 6 bars back in to fill it back up to its capacity of 7 total bars. Now when you save this next service in the cloud, you do record that you added 6 bars in your service fill and the Fill Vends/Sales computation now picks up that those 6 bars have sold when Toucan does its computing while the eData revenue will only see the 4 that have actually sold since the last service.

Which means that at this point if you took the total eData revenue 6 bars have sold (the 2 previously at the first of the month and the last 4) and total Fill Vends/Sales revenue also has picked up the 6 bars (all 6 with this last service when you recorded you added them), so now the Fill Vends/Sales and eData revenue are back to being the same, but only after you fill something back up to its starting point does the Fill Vends/Sales catch up with the eData revenue.

The take away from this is... If you didn't have a card reader in your machine then the Fill Vends and Fill Sales becomes your primary source to track revenue and sales. If you have card reader data (eData) it is your primary source to track revenue and sales. Toucan is able to manage both and provide both to you.

Even if you have a card reader Toucan will continue to do its Fill Sales and Fill Vends computations so you can use the Fill Vends/Sales to reconcile with your eData vends/sales. Just know that the two can be different at times and if you see them different now you know why. One advantage to having both is you can monitor and check one against the other. If you did fill the machine completely back to its starting point so you now know that the Fill Vends/Sales should be fairly close to the eData vends/sales and they are not – it could be an indicator that maybe a coil in the machine is not turning correctly so your eData sales are much higher than your Fill Sales or maybe your machine is on 'Free Vend' or lottery mode – so your Fill Sales will be much higher than your eData sales.

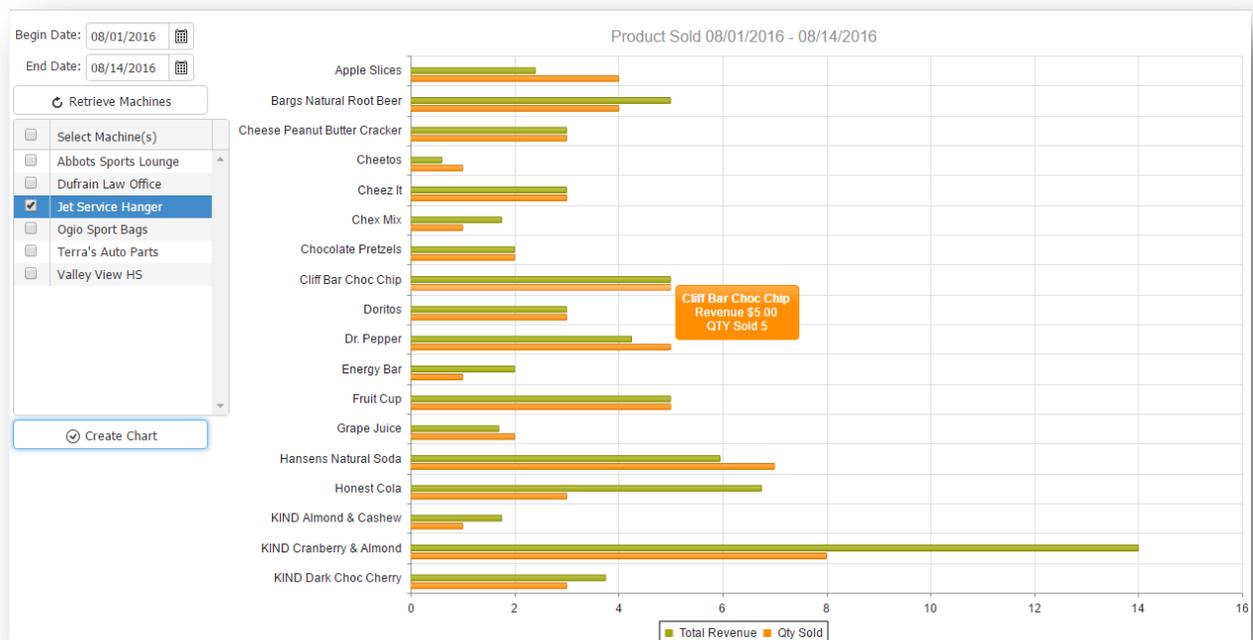
But you don't need to get caught up in the details either, if you have a card reader, use the eData as your source of revenue, if you don't have one, use the Fill Vends/Sales as your source of revenue – and keep it simple until you are ready to get into more of the details.

## Remote Monitoring Tools

The remote monitoring tools only analyze the data loaded from the eData device. They do not incorporate any of the service or fill data that you enter in Toucan or Toco. So they give you a great way to analyze your data using the raw eData transactions coming from the card reader and isolate those transactions only, hence the remote monitoring capability.

## Product Sold Graph

The product sold graph is a graphical representation of the eData that has been loaded processed and linked up to products in the machine. It allows you to graphically analyze the number of products sold and the revenue from that product that has been reported by the eData device (the card reader).



You supply the graph with a Begin Date and an End Date. You can type the date or use the calendar date picker (the Begin Date assumes a time of 12:00am, the End Date assumes a time of 11:59pm so as to get all transactions for that date range) if you type a bad date like 2/30/24 you won't get any results back and Toucan might squawk. With the valid date range in place that you want to query for click Retrieve Machines to bring back a list of all the machines that have had eData activity during that date range. Once your list of machines is populated, just put a check box next to the ones you want to graph out. You can select 1 or more than one (you could select 0 but you won't get anything back and Toucan will wonder what you are doing). You can use the check box in the header to select or deselect all of the machines at once, but beware, if you select all of your machines you will probably have a pretty full graph – not a problem on a large monitor, but a phone will be difficult to see.

When the graph is rendered you will see the product vended during the date range given for the machine(s) selected. There are two lines for each product. One will show the total revenue and the other will show the quantity sold (Qty Sold) – the colors of each are indicated in the legend at the bottom of the graph and could be different depending on your theme. Hovering over the lines will give you a popup label that will give you the same info. You can use this tool to graphically see which products are moving the fastest from a machine and which ones are being doggie. You can also compare Qty Sold with Total Revenue across all products over a single machine or range of machines and see that the product selling the most may not be the biggest revenue producer for you.

## Machine Inventory Report

The Machine Inventory Report can be used in two ways which is controlled by the check box 'Show Vend History since last Service'.

Source	Coil	Product	Coil Capacity	Activity Date	e Vends	Product Level	Est. To Fill
Toco	D4	Grape Juice	12	08/15/2016 14:00:00		12	
ePort	D4	Grape Juice	12	08/17/2016 23:59:59		12	
ePort	D4	Grape Juice	12	08/18/2016 21:57:47	2	10	
ePort	D4	Grape Juice	12	08/19/2016 23:55:16	1	9	
ePort	D4	Grape Juice	12	08/20/2016 00:23:20	1	8	4
Toco	D5	Honest Cola	12	08/15/2016 14:00:00		12	
ePort	D5	Honest Cola	12	08/17/2016 22:38:53	1	11	
ePort	D5	Honest Cola	12	08/18/2016 21:57:47	1	10	
ePort	D5	Honest Cola	12	08/19/2016 23:55:16	2	8	
ePort	D5	Honest Cola	12	08/20/2016 23:59:59		8	4

In the example above the box is checked. This modifies the report so that you can see the vend history of each coil starting with the last time you filled the machine from the date you enter in the Date field (the time assumed is 11:59pm to get all transactions for that date). In this example the D4 coil holding Grape Juice can be seen and the first row with activity date of 8/15/16 at 2:00pm is in blue. Blue means the service info was entered from Toco – if the service info would have been entered from Toucan the row would appear black (you can see this in the 'Source' column as well). The subsequent green rows for D4, have come in from an ePort device (also indicated in 'Source'). There is a green row for each day that eData is

loaded. So we can see that when the service fill was recorded in Toco on 8/15 at 2:00pm the Service Fill for D4 was set to 12 by the person filling the machine (this is what set the Product Level column). There is no data loaded for this machine on 8/16 maybe because the location was closed and so there were no vends at all for the machine. On 8/17 there were no vends for the D4 coil but there were vends for the machine and so we got eData. On 8/18 there were 2 vends for this coil with the last one occurring at 9:57pm – this brought the Product Level (or eData Level) down to 10 for D4. 8/19 and 8/20 each had a single vend for this coil so by 8/20 there are 8 Grape Juice's in D4 and the Est. To Fill (Estimate needed to fill the coil back to capacity) on 8/20 is 4. The date supplied for this report to compute machine inventory is showing as 8/24/16 (in the Date field). This tells us that 8/20/16 was the last time that any eData had been loaded into Toucan. You can see a lot of information from this report. One nice usage for this report is if a product level were to go to 0 and vend completely out, running the report to show the history allows you to see if that coil just went empty or if it has been sitting empty for several days. This is good info to have.

The other option for running the report is to uncheck the Show Vend History check box. This configures the report to only show the most recent activity, so instead of seeing a vend history for each coil, you only see one row for each coil with the last activity date for that coil and the current product level in that coil as of the activity date. This makes for a much smaller and concise report for doing pre kitting with. You can export this report to excel and print it using excel or Google sheets to take with you and have something to take notes on. Toco also gives you this same information on your phone or tablet via its 'Service' screen.

## Low Product Report

Low Product Report					
Products at or below their Low/Par Level for all Working Locations.					
<input type="button" value="Generate Rpt"/> <input type="button" value="Collapse All"/> <input type="button" value="Expand All"/> <input type="button" value="Export to Excel"/>					
	Coil	Product	eData Level	Coil Capacity	Low/Par Level
▶ LocationName: Abbots Sports Lounge					
▶ LocationName: Avalon Nursing Home					
▲ LocationName: Durfrain Law Office					
<input checked="" type="checkbox"/> MachineName: Durfrain Law Office					
	B3	Chocolate Pretzels	1	7	2
	D4	Grape Juice	1	12	2
	D6	Dole Pineapple Juice	0	12	2
	D8	Honest Tea	2	12	2
▶ LocationName: Jet Service Hanger					
▶ LocationName: Maxx Hair Salon					
▶ LocationName: Ogio Sport Bags					
▶ LocationName: Terra's Auto Parts					

The Low Product Report gives you a quick way to see all of the Machines with low products (products that are at or below their Low Level amount) and to see what those products are in those machines. Essentially any machine that shows in **Red** on your working location list has a low coil. You could go into the service window of each of these machines and see the low coils in the coil list (these will also be red) to see the actual low product, or use the Low Product

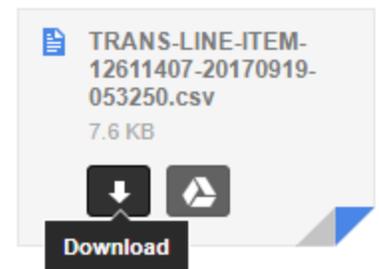
report here in the Remote Monitoring section and see all of the low products across all of your machines in one report.

## eData Tools

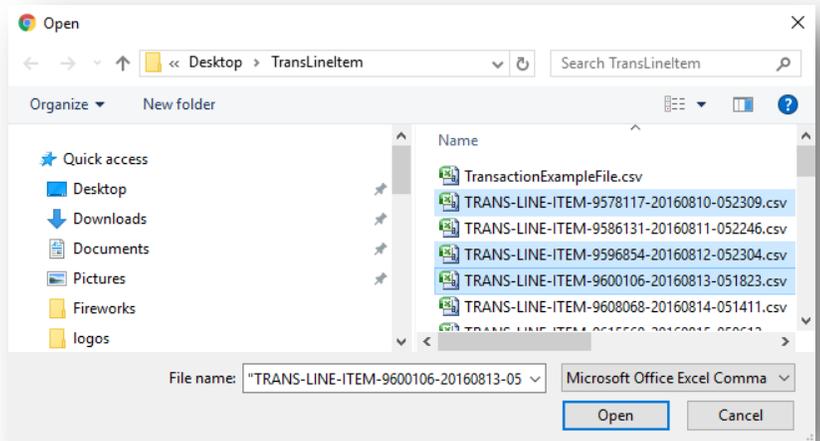
The options available under the eData Tools section do analysis directly on the data loaded from your card reader only. If you have a card reader in your machine you can use these tools as your primary source of revenue data.

### Loading eData manually from your eDevice (card reader)

Depending on what kind of card reader your machine has you should be getting your daily transaction data, probably as an attachment in an email. From USATech you should get a daily email and you should have an attachment named Trans-Line-Item-[bunch of numbers].csv (comma separated values) – This is called the **Transaction Line Item Detail Export** report this is the data that your VMS can read. If you are not getting this file from USATech you need to call and let them know. How you choose to manage the email is personal preference. But to describe how to load the data I will use an example. For this example I will be saving the attachments to a folder I created on my hard drive, if you do it this way you may want to name the folder 'ePortData' – inside the ePortData folder you might create a folder called 'In' and another one called 'Out'. If I was good with my email client I could even create a rule or event that would automatically save the attachment to my C:\ePortData\In folder for me. Or I can just manually download the attachments as I open the emails.



When I'm ready to load my data I will look under the eData Tools section in the Toucan navigation panel and click 'Load ePort CSV files'. I will see an Open window pop up that lets me navigate to the place on my computer where I am saving those Trans-Line-Item .csv files. (each browser handles this a little differently but basically you should see something like this)...



So in my example I will use this Open window to navigate to my C:\ePortData\In folder on my hard drive where my Trans Line Item files are. Once you navigate to the folder where you are storing your Trans Line Item .csv files you should be able to pick multiple files by holding down the control key on your keyboard and clicking each file you want to load. You can load multiple files at once. On this 'Open' window that your browser has opened and where you just selected your files you should see an 'Open' button somewhere, usually at the bottom. So after you pick the files you want to load just click that Open button. The software will then read that file or files and pull the data into the load screen for you so you can see the raw data from the file(s). This lets you sort of preview the data, check the dates, and just eyeball stuff. Then when you are ready to actually load the data look to bottom of this screen and there are two buttons at the bottom - Process Files and Clear Files. Clear Files lets you clear the raw data and clear the files so you can start again if needed. Process Files button will actually take the

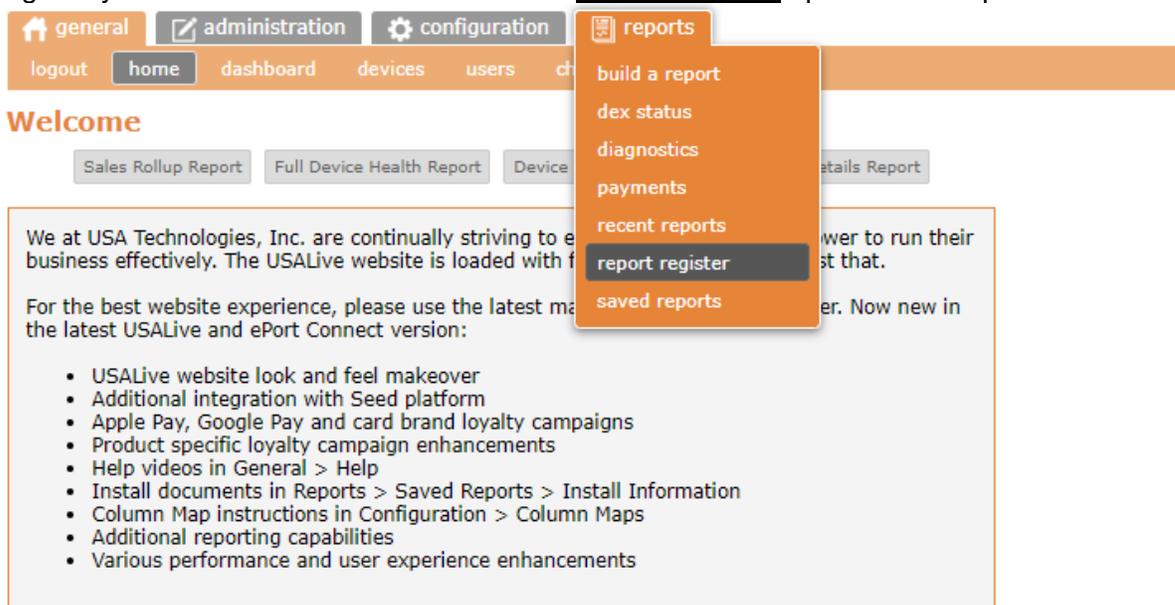
data you see in the load screen and save it into the cloud and pair it up with its correct location, machine, and product (using the eDevice Id that is in the file and the one you set in your Machine detail) – then Toucan loads that data to the service history and computes machine inventories and does other things. It's doing a lot of work for you and it's pretty fast but you may have to be patient. You'll see a spinner, depending on your theme, indicating that Toucan is working

When that is done I am diligent and I will go into my C:\eData\In folder and I will copy all of the files I just loaded and move them into my \out folder – that way I know I've loaded them. You could also delete them if you wanted. Toucan will do its best to catch if a file has been loaded already and will skip that file if you try and load it again. Toucan is always looking for any duplicate transactions and prevents them from being added again to keep your inventory and revenue accurate. If the file is not the right file or Toucan cannot read it, say it has been messed up in some way (like someone opened it up with Excel and makes changes manually), Toucan will squawk and let you know.

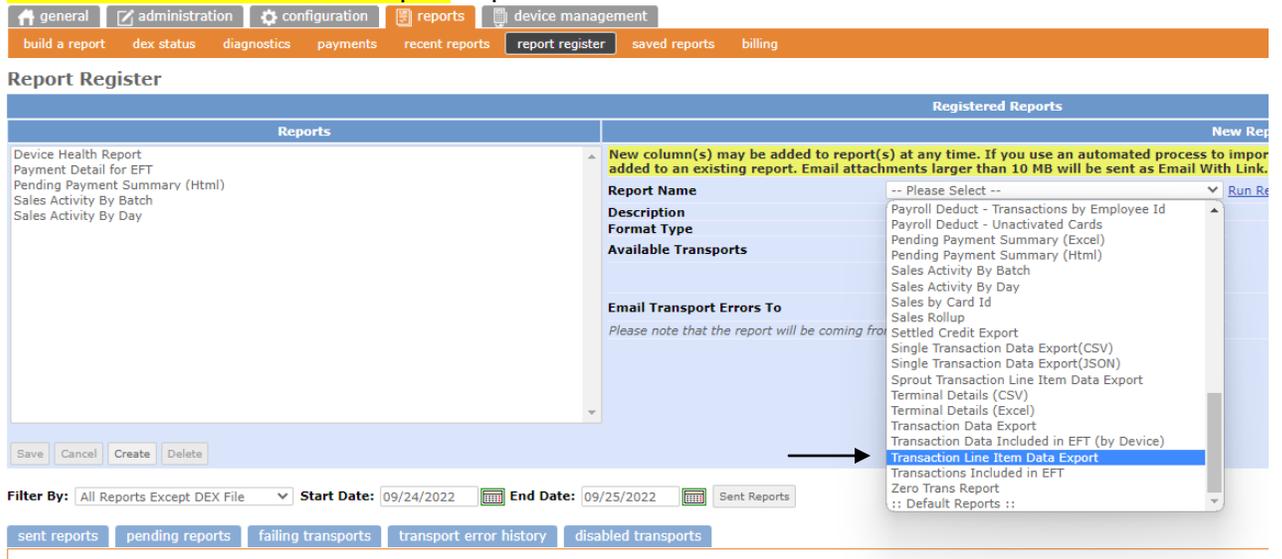
After it has processed and you have cleaned up your files you can go into the Raw eData section and see the data it loaded and how it matched up. Green is what came in from the file and black is how Toucan matched it up.

## Setting up your Transaction Line Item Export Rpt in SeedLive (Cantaloupe)

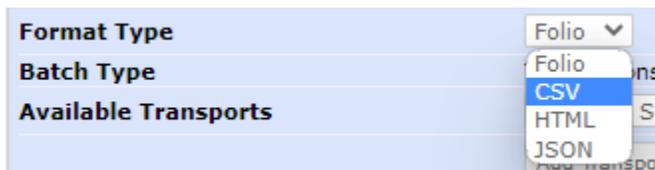
1. Login to your SeedLive account and click the [Report Register](#) option in the reports tab



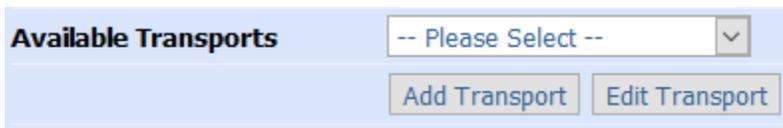
- When the Report Register opens, use the Report Name drop down list and choose the 'Transaction Line Item Data Export' report from the list.



- Make the Format Type 'CSV'



- Next you need to pick the transport to deliver your report, so use the drop down list of Available Transports



You should see your email (or your name) as a transport option in the Available Transport drop down list. If not then click the Add Transport button.

**Add Transport**

**Transport Status**

**Transport Name\*** My Email

**Transport Type** Email

**Email \*** YourEmailAddress@email.com

**CC**

**As Zip File**

**Min Bytes to Send**

**Min Lines to Send**

\* - Required

Test Transport Add Transport

In the Add Transport list, you can give this transport a name like 'My Email'. In the Transport Type pick Email from the drop down list. Then in the Email field put in the email address where you want these daily reports delivered. Then click Add Transport/

If you already see your name as a transport option but are not sure if the email associated with the transport is correct you can click the Edit Transport button to verify the email address. Once you have selected the

transport with the email address you want for the delivery of the report, then you are ready to save this report (next page).

[general](#) | [administration](#) | [configuration](#) | [reports](#)

[build a report](#) | [dex status](#) | [diagnostics](#) | [payments](#) | [recent reports](#) | **report register** | [saved reports](#)

### Report Register

Reports	Registered Reports	New Report Inf
Payment Detail for EFT ( ) Pending Payment Summary (Html) ( ) Sales Activity By Batch ( ) Single Transaction Data Export(CSV) ( ) Transaction Line Item Data Export ( ) Transactions Included in EFT ( )	<b>New column(s) may be added to report(s) at any time. If you use an au ensure that it will not be negatively affected if new column(s) are adde</b>	<b>Report Name</b> Transaction Data Export(CSV) ▼ <b>Description</b> Single Transaction data in csv format. Includes: T (Credit, Cash, Pass, etc), Card Number, Total Amc Transaction , Card Id <b>Format Type</b> CSV <b>Batch Type</b> Single Transaction <b>Available Transports</b> ▼ Add Transport Edit Transport Delete Transp <b>Email Transport Errors To</b> <input type="text"/> <i>Please note that the report will be coming from the following IP addresses: 208..</i>

Editing in process. Click 'Cancel' to select a different Report

**Filter By:** All Reports Except DEX File ▼ **Start Date:** 10/22/2017  **End Date:** 10/23/2017

Click the Save button in the lower left corner of the screen to save this report along with the delivery transport. It could take up to 24 hours for the transport and report to go active but you should start seeing that Transaction Line Item Data Export show up in your daily email.

## Generating a Manual Trans Line Item file from Cantaloupe

You can manually create a file from your seedlive account if you need to. For example if you missed several days of transactions for some reason, you can pull a report for these missing transactions so you can upload them to your cloud and get things back up to date.

1) Log into your SeedLive account and go to the reports tab. Once you are on that reports tab look for the Saved reports (below is a screenshot of what that should look like)

[USA](#) |

[general](#) | [administration](#) | [configuration](#) | [reports](#)

[build a report](#) | [dex status](#) | [diagnostics](#) | [payments](#) | [recent reports](#) | [report register](#) | **saved reports**

### Saved Reports

[daily operations](#) | [install information](#) | [more platform](#) | **sales analysis** | [report register](#) | [user defined](#)

- ▶ Card Usage
- ▶ Cash vs. Credit Analysis
- ▶ Credit Card Summary
- ▶ Device vs. Device (Last 60 Days)
- ▶ Hottest Items
- ▶ MTD Sales By Day of Week For All Devices
- ▶ MTD Sales By Hour of Day For All Devices
- ▶ MTD Sales for each Device By Transaction Type
- ▶ MTD Sales Summary
- ▶ Pass-Access Card Summary
- ▶ Refund Summary
- ▶ Settled Credit Export
- ▶ **Transaction Line Item Export**
- ▶ Transaction Items
- ▶ YTD Sales By Day of Week For All Devices
- ▶ YTD Sales By Hour of Day For All Devices
- ▶ YTD Sales for each Device By Transaction Type
- ▶ YTD Sales Summary

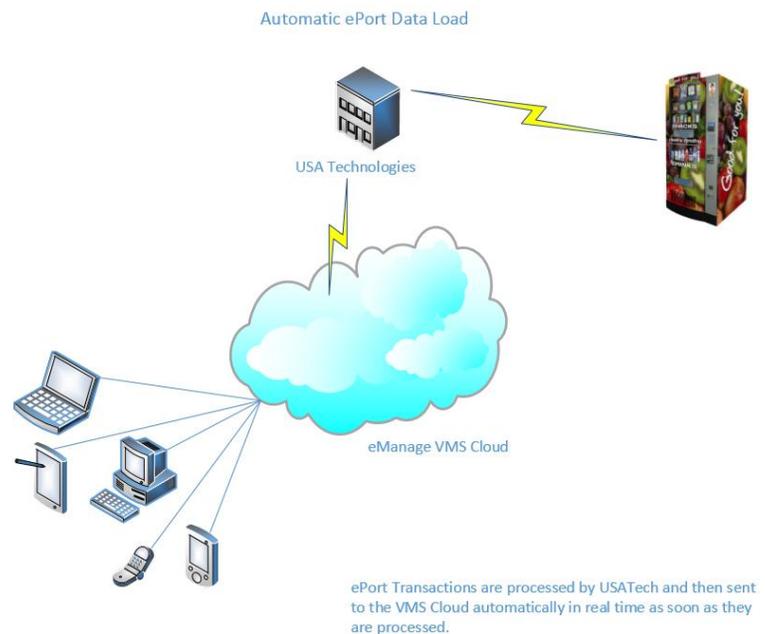
- 2) On that screen of Saved Reports there is a 'Sales Analysis' tab that you will want to click
  - 3) When those reports come up look about 2/3rds of the way down the list and you should see a Transaction Line Item Export link. When you click the Transaction Line Item Export link you'll get a screen that lets you enter a date range, so enter the date range for the transactions you might be missing and click Run Report. This will pull all of those transactions into the single file.
- \*Note - if you use the little CSV looking button next to the Report Name in the Saved Report List instead of clicking the report name (screenshot above) - It will skip the step of showing you the results and go right to creation of the .csv file
- 4) The transactions will come back and you can view them - then you can use the 'csv' button in the upper right corner of the screen to save the results to a .csv file. If you use the CSV button instead of the report name in step 3 – you won't need to do this step.
  - 5) Once you have that file you can load it into Toucan just like you would the files that they email out.

### Loading eData Automatically from your eDevice

You can opt to be part of the Enterprise version of Vending Zoo and Toucan and get additional features. One of which is the Auto Load capability of your eData transactions. When the AutoLoad feature is enabled your eData transactions are sent directly to the cloud for you as they happen in real time.

As vends occur they are processed by USAT and then they are sent directly to the VMS Cloud where Toucan processes them for you. All of your reports across all of your applications (Toucan, Toco, Machine Inventory, Revenue Rpts, etc) are all updated in real time as the transactions are delivered. So you can literally watch as your machines are vending.

In addition to getting the daily reports from USAT, when you enable your AutoLoad feature, the VMS Cloud will also send you a daily report each morning detailing what vended the prior day as well as providing you with inventory information on those vended products.



Example eData Transaction Report:

Valley View HS

G8718839 - Valley View HS

Trans #	Type	Trans Date	Coil	Level	Product	Qty	Price	Amount
7303515124	Cash	05/05/17 08:16:02 AM	B1	5/7	Cheez It	1	\$0.75	\$0.75
7303515137	Cash	05/05/17 02:55:11 PM	A1	4/7	Apple Chips	1	\$1.00	\$1.00
7303515153	Cash	05/05/17 02:55:44 PM	A1	/	Apple Chips	1	\$1.00	\$1.00
<i>Cash Total</i>						3		\$2.75
Trans #	Type	Trans Date	Coil	Level	Product	Qty	Price	Amount
7299406973	Credit	05/05/17 03:04:32 AM	C9	10/14	Fruit Cup	1	\$1.75	\$1.75
7299897840	Credit	05/05/17 07:17:58 AM	C3	12/14	Cheez It	1	\$1.00	\$1.00
7299897840	Credit	05/05/17 07:17:58 AM	C6	11/14	Cliff Bar Choc Chip	1	\$1.00	\$1.00
7303200795	Credit	05/05/17 11:29:09 PM	A4	5/7	Apple Slices	1	\$1.25	\$1.25
<i>Credit Total</i>						4		\$5.00
<b>G8718839 Total</b>						<b>7</b>		<b>\$7.75</b>
<b>Report Total</b>						<b>68</b>		<b>\$68.55</b>

\*Level = (ProductLevel / CoilCapacity) If value is ' / ' it means the coil has vended multiple times, so look for the level on a different row.

You can view all of the previous days transactions for all your machines and inspect the inventory levels of the products that vended using the 'Level' column. The Level column shows you the ProductLevel / CoilCapacity and only displays the most recent inventory level. So if a product vended multiple times during the day, the only Level value you will see for that coil is the most current value. The other rows for that day that were processed earlier in the day will show a ' / ' for the Level. This makes it less confusing to know the current inventory.

In the example above A1 has vended twice during the day. Both were cash transactions. The 5/5/17 2:55:44pm transaction was actually sent to the VMS Cloud by USAT **before** they sent the 5/5/17 2:55:11pm transaction. So when the 2:55:44pm vend came through first, Toucan computed the 'Level' to be 5/7 (5 Apple Chips with a capacity of 7). Then shortly after the 2:55:44pm transaction, USAT sent the 2:55:11pm transaction and Toucan re-calculated the Level to be 4/7 and therefore does not display the 5/7. It only displays the most current product level based on the last transaction submitted so you know what the current product level is for a coil.

**Raw eData**

Your Raw eData is the data loaded into your cloud from either the manual file you load or the automatically loaded transactions sent to the cloud. At times you may just want to see or search the Raw eData to look for a specific credit card transaction, or see the vends from a specific coil on a certain day. Other times you might need to back out some data and re-load it. For example, you put the wrong product in the wrong coil of a machine and didn't realize it and then you were so excited to load your data you didn't double check and you loaded a month's worth of data only to realize later that you setup the wrong product in the machine, so now it looks like that product is selling a lot more than it really should be. If you find yourself in this situation you can back out your data and re-process it – you do not need the original Trans Line Item .csv files unless you completely remove the data from the cloud (with the Delete Selected Records button).

Under the eData Tools section in the navigation panel is the 'Raw eData' option. When you click it, the Raw eData screen will open. This is one of the few search screens that will not automatically retrieve for you. So you will need to use the drop downs and pick a specific

Status	Prcd Date	Device ID	Transaction	TransDate	Type
Unlinked	12/20/2016	G8727714	6431750606	09/01/2016 14:01:54	Credit
Unlinked	12/20/2016	G8727714	6433649021	09/01/2016 18:56:00	Cash
Unlinked	12/20/2016	G8727714	6434030790	09/02/2016 05:23:49	Credit
Unlinked	12/20/2016	G8727714	6434558472	09/02/2016 08:41:01	Credit
Unlinked	12/20/2016	G8727713	6437411853	09/03/2016 01:15:30	Credit

location, machine, credit card, transaction date, type, status, etc... that you are looking for and click the search button to retrieve the data. Leaving the search bar blank and clicking search will bring back all of the electronic data that has been loaded. (This could be a lot). The example above shows a query for all unlinked records processed on or after 9/1/16 00:00

When looking at your data you will see some of it in Black and some of it in Green. Green is what came in from the eDevice itself – that is the only data that was in the file. Black is what Toucan was able to link up and match to using the data in your cloud via your machine list, product list, location list, etc.

There are several buttons in the button bar of this screen above the search bar that you can use to re-process the data if needed.

We will go over the buttons that let you 'Re-do' your data but first we will look at how you can interpret some of this data. To start with... you can see the status of each of the rows in the Status column. This will tell you if the eData row was processed or not.

- Unlinked** – This data has been loaded from the file but it hasn't been linked up to anything. It could be that when Toucan tried to process this data it could not find the machine in the Machine List with an eDevice Id that matched up to the device Id that came in the file, maybe the eDevice Id was entered incorrectly in Toucan. If the eDevice Id in Toucan is correct for that machine then it may be that the coil for the transaction that came in the file didn't match up to a coil in the machine, maybe the machine had an entree unit added to it and someone forgot to update the machine in Toucan to include those new coils, or it could be that the coil in Toucan is entered incorrectly, for example the coil in the eData is D4 but the coil in Toucan for that machine is D04. Another possibility is the eDevice Id and the coils are all correctly entered in Toucan for the machine but... Toucan does not have any history to link to. Say you entered your first service for a machine and recorded you serviced it for the first time at 10/30/24 at 5:00pm. So this is the first record in your service history for this machine at this location. But the eData comes in with transactions that happened 10/30/24 at 8:00am and 9:15am. Those transactions are before the first service date/time you entered for the machine – so Toucan cannot use your service record and it won't be able to find any history to link to. Those are some common reasons why data does not link up.

- **Linked Only** – This means that the data was linked up when the file was processed, but something happened to interrupt Toucan while it was trying to actually Process the data into the service history and compute machine inventory levels. So this data is saved in the cloud, it is linked up, but it is not loaded to the service history and it is not being used to figure machine inventory levels.
- **Processed** – It all linked up and it was all loaded and all is well. Unless you provided inaccurate data for Toucan to link with. Then Toucan thinks all is well but you realize you made a mistake.

You can also see the processed date (**Prcd Date**) when the eData was loaded. You may notice that there is an **RCoil** and an **MCoil** column as well as an **RPrice** and **MPrice** column. These stand for Raw Coil, Mapped Coil and Raw Price, Mapped Price.

- **Raw Coil vs Mapped Coil** – Sometimes your data is not ‘mapped’, remember the eDevice only knows that at a certain time, a certain amount of money came into the machine – either cash or credit, and a certain motor in the machine turned. That is all it knows and usually the motor is identified by some code like 0301 or x0c5 – which does not make much sense to human eyes. So if Toucan detects this it will try and convert the raw value to a mapped value so you will see B4 or C10 instead of ‘the code’
- **RawPrice vs MappedPrice** – There are certain situations when a product that really vends for .95 shows up with a price of .05 and a price of .90. This can happen when a transaction is part credit and part cash, which most machines will allow if they are configured for MultiTender vends which most machines are. A real world scenario that can cause this is a child walking up to a machine and pulling all the coins out of their pocket and dumping them into the machine. Not enough to purchase anything, so they grab a parent and the parent finishes the transaction with a card. The data from the ePort device actually makes it appear that the product in this scenario vended twice and will show up as two separate transactions in the eData file. When Toucan detects this it finds the two separate transactions and sort of links them together and figures out what the actual price that was billed to the customer was and that goes in the MPrice column. It will also make a note about this in the Process Notes column and tell you something like ‘:MultiTender Vend with Trans 6387551685’ So you can watch for those and see how often they are happening
- **Raw Qty vs Mapped Qty** - Just like the situation described above... If Toucan needs to modify the Qty vended because the eData reported looks like 2 vends instead of 1, it will leave the RQty column with what was originally reported and the MQty column is the mapped Qty that Toucan adjusted.

**Process Notes** – You may see some other useful information displayed in the Process Notes column to help explain something about that particular transaction and how it was processed.

- : **No Machine Model Defined** – which means when Toucan went to link the data for the transaction, it found the Device ID for that machine in the Machine List, but the machine in the Machine List did not have a Machine Model defined. So Toucan will not be able to figure out how to map the coils for this machine.
- : **Dangling Transaction** – This happens if an older transaction gets sent in a file. For example, you saved a service on 10/15/24 at 3:00pm, but when you load the file with the 10/15 transactions there were also a couple of transactions for 10/14 that trickled in as well as a transaction for 10/15 at 11:00am. These are ‘dangling’ transactions, they occurred before you serviced the machine but you’re just getting them now after you saved your 10/15/24 3:00pm service. They will be loaded and their revenue will be

added, but they will not affect the machine inventory so they will not show on the Machine Inventory report. Only transactions that happen after 10/15/24 3:00pm will be used for machine inventory calculations and will show on the report.

- : *MultiTender Vend with Trans [Transaction Number]* – If Toucan detects a transaction as part Cash and part Credit it will apply some special handling to keep vend counts and prices accurate and flags the transaction as multi-tender along with the transaction number so you can inspect them if you wish. This can happen if someone pays cash for a product and then leaves the machine without collecting their change. The next person uses credit to make a purchase. The machine will apply the remaining change from the previous vend to the current vend and split the transaction between cash and credit into 2 distinct transactions. Most of the time people making the purchase are not even aware this has happened.
- : *Service Resync [date]* – If a transaction gets backed out and then reloaded, either manually from the Raw eData screen (explained below) or when Toucan does a resync as a service is saved. This will be in the processing notes for those transactions.
- : *Refund Issued* – When Toucan processes a refund transaction.
- : *Discrepancy Adjustment* – Sometimes your machine may not report the coil through the ePort that the transaction came from, when that happens Toucan will note the transaction with a Discrepancy Adjustment. The Revenue amounts for the machine will still be accurate, but without knowing which coil dispensed the product Toucan is not able to reduce the inventory, so this can skew the inventory. This is a rare event but does happen with all machines sometimes. But if you notice a machine is showing a lot of discrepancy adjustments you may want to investigate to see if a wire is loose or if a certain coil is not reporting consistently.
- : *Empty Product* – In the history record for the coil that this eData record was trying to link to, the product was the 'Empty Product'. So the eData record could not get linked up to a defined product because one wasn't showing in that coil for the machine.

## How To Reprocess or Reload eData

Now that we know a little about what we are seeing, how can we 're-do' the data if needed. First you have to identify the rows that you want to re-load. Use the search bar to search for a specific machine, or machine and date, or a status and retrieve back the data you want to reprocess. Then select the specific rows you need to back out and re load and you do this by checking the check box next to that row. So it may be painful but you do need to select the rows by checking the box by the ones that you want to re-do. Once you have selected the rows you want, click the *Unlink Selected Rows* button. Toucan will take all the rows you have selected. Then it will check to see if there are rows that are dependent on the rows you selected, like if a product vended twice in the same file but you only selected one of them, Toucan knows that it needs to back both of those vends out so it finds all of the dependent eData records as well as the ones you checked. Then it scours the service history that would have been created by those transactions when they were originally processed (the green rows you see in your service history) and deletes that data from the service history which also unlinks the eData rows from any location, machine, or product, that they were linked to previously. This also resets the 'status' of the eData row. When Toucan is done you will still see those Raw Data rows in the cloud (it doesn't delete the actual data loaded from the files) but now those rows are Unlinked and the status will be changed to indicate that. You also won't see much black, or linked data, in those rows anymore, all of that will be gone. Those records have been unlinked and backed out and they have been backed out and removed from your service history as well, like they had never been loaded.

*Note: The Raw eData screen will re-retrieve but it will use the same query criteria that you had entered. So if you retrieved all the records for Machine A that were loaded since 5/10/24 as your search query, and then selected them and clicked the Unlink button. Now those records are no longer linked to Machine A so when the Raw eData screen re-retrieves, nothing comes back. You may need to change your search criteria by clearing out the original criteria and then choose 'Unlinked' from the status column and retrieve the now unlinked records to see them. Same thing if you reprocess those unlinked records and you are still searching for a status of unlinked, now that the records are linked, they won't show up in a search looking for unlinked records.*

Now you can click the *ReProcess Unlinked Rows* button. This tells Toucan to go to work again. This time any row in your cloud that has a status of Unlinked will be picked – Toucan will try and link it back up and process it again, creating new service history rows and merging the data back into the existing history and re-computing machine inventory data, but now it's going to do all of this using any new data you entered or changed. So before you unlink and reprocess you need to make any corrections to your service data that you need to. This does make for a lot of work for Toucan so you may need to be patient. When Toucan is done it will refresh the Raw Data screen so you may need to change your query criteria to see the changes.

*Delete Selected Rows* – this is the button that will remove the data from the cloud completely, It will unlink the data and back it out like the unlink button, but it does one more step to actually delete the eData rows from your cloud... so use it wisely.

## Formatting the Raw eData Screen

Just below the Button bar is a 'Grouping Area' that displays 'Drag a column header and drop it here to group by that column' when you have no groups. This means you can drag any column header and drop it in this area and Toucan will group the data retrieved by that column. Multiple nested groups can be created but you may have to re-size columns so you can see the data. The image below shows the Raw eData grouped by Product and then by Machine. To change the sort order of the group use the sort icon, and to remove a group use the [-] sign, or drag the

	RPrice	RQty	MCoil	MPrice	MQty	LineTotal	TransTotal	Card
Product: Apple Slices								
Machine: Terra's Auto Parts								
Machine: Ogio Sport Bags								
	\$1.00	1	A4	\$1.00	1	\$1.00	\$1.00	
	\$1.00		A4	\$1.00	1	\$1.00	\$3.00	475824*****74
	\$1.00	1	A4	\$1.00	1	\$1.00	\$1.00	
	\$1.00		A4	\$1.00	1	\$1.00	\$1.00	
	\$1.00		A4	\$1.00	1	\$1.00	\$1.00	
	\$1.00		A4	\$1.00	1	\$1.00	\$2.50	468829*****01
Machine: Dufrain Law Office								
Machine: Abbots Sports Lounge								
Machine: Jet Service Hanger								
Product: Cliff Bar Peanut								
Machine: Terra's Auto Parts								
Machine: Ogio Sport Bags								
					1926	\$2,177.55		

Page 9 of 38    50 records per page

column off of the grouping area. To alter the order of nested groups just drag the column headers to the desired order. At the bottom is the 'paging' tool that lets you scroll through the pages retrieved. Also displayed are the totals for the Qty Sold and the LineTotal (Revenue computed by Toucan). You can see the Transaction total for the second transaction is \$3, while the LineTotal is showing \$1. This is an example of a multi-product transaction. It means that Apple Slices at Ogio Sport Bags was purchased with several other products in the same transaction. The transaction total was \$3 but only \$1 was for the Apple Slices. You could find all of the products that participated in this transaction together by scrolling to the left and getting the Transaction number, and then using the search bar, query for that transaction and you would then see all of the products that made up the \$3 transaction. Refunds will also show in the Raw eData when they are processed.

## Revenue Rpt

When you supply a begin date and an end date and click the Generate Revenue Rpt button, the Raw Revenue Rpt will query all eData transactions that fall within the date range you supplied and then group those transactions by Location, Machine, and Product. For each of the groups it

Begin Date: 08/01/2016 End Date: 08/15/2016 [Configure Rpt](#)

[Generate Revenue Rpt](#) [Collapse All](#) [Expand All](#) [Export to Excel](#) [Export to PDF](#)

	eDeviceId	Source	RCoil	RPrice	MappedCoil	MPrice	Activity Date	Qty	TransType	LineAmount	TransAmount
<b>UnLinked Location(s) - (Total Sold: 29 - \$27.25)</b> <ul style="list-style-type: none"> <li>UnLinked Machine(s) - (Total Sold: 29 - \$27.25)</li> </ul>											
<b>Abbots Sports Lounge - (Total Sold: 115 - \$125.35)</b> <ul style="list-style-type: none"> <li>Abbots Sports Lounge - (Total Sold: 115 - \$125.35)           <ul style="list-style-type: none"> <li>Apple Slices - (Total Sold: 2 - \$2.00)</li> <li>Bargs Natural Root Beer - (Total Sold: 4 - \$9.00)               <ul style="list-style-type: none"> <li>G8727712 ePort D7 \$2.25 D7 \$2.25 08/09/16 07:31 1 Credit \$2.25 \$2.25</li> <li>G8727712 ePort D7 \$2.25 D7 \$2.25 08/09/16 08:42 1 Credit \$2.25 \$2.25</li> <li>G8727712 ePort D7 \$2.25 D7 \$2.25 08/09/16 10:01 1 Credit \$2.25 \$2.25</li> <li>G8727712 ePort D7 \$2.25 D7 \$2.25 08/10/16 12:03 1 Credit \$2.25 \$2.25</li> </ul> </li> <li>Blue Diamond Almonds - (Total Sold: 3 - \$3.00)               <ul style="list-style-type: none"> <li>G8727712 ePort A2 \$1.00 A2 \$1.00 08/09/16 17:28 1 Cash \$1.00 \$1.00</li> <li>G8727712 ePort A2 \$1.00 A2 \$1.00 08/11/16 16:03 1 Credit \$1.00 \$1.00</li> <li>G8727712 ePort A2 \$1.00 A2 \$1.00 08/15/16 14:47 1 Cash \$1.00 \$1.00</li> </ul> </li> <li>Bugles - (Total Sold: 5 - \$5.00)</li> <li>Cheese Peanut Butter Cracker - (Total Sold: 5 - \$8.75)</li> <li>Cheetos - (Total Sold: 4 - \$4.00)</li> <li>Cheez It - (Total Sold: 1 - \$1.00)</li> </ul> </li> </ul>											
Count: 329 Qty: 334 \$376.60											

will total the Qty of products sold and the revenue generated by that group. Using the **Collapse All** and **Expand All** buttons you can roll the groups up in the tree view, and then expand individual groups to see the detail. **If you are working with lots of data the Expand All and Collapse All may take a little while. This does not depend on your internet connection, but it does depend on the device you are using and your browser.**

**Line Amount** – This column on the report is similar to the LineTotal column of the Raw eData screen. It is a computation of the actual revenue for each individual transaction as Toucan processes any refunds, multi product, and multi-tender transactions.

The Raw Price (RPrice) and Raw Transaction Amount (TransAmount) loaded from the eData files are also given for additional information. In the footer of the report several aggregate totals are computed.

- Count – displays the total number of records or transactions on the report.
- Qty – sums the total Mapped Qty of products sold for the records that were retrieved
- LineAmount – This is the total revenue Toucan computes for you based on the raw eData.

**Configure Report** – This option lets you pick specific locations and specific product categories sold at your selected locations. You can choose the categories currently shown in the product list or the category the product was in at the time of the vend.

Revenue Rpt Parameters

Choose the Locations and the Product Categories for those locations that you want to retrieve in the Revenue Rpt... If nothing is selected, everything is retrieved. (Don't forget to Generate Rpt)

<input type="checkbox"/> Select Location(s)	<input type="checkbox"/> Select Categories
<input type="checkbox"/> Abbots Sports Lounge	<input type="checkbox"/> Carbonated
<input checked="" type="checkbox"/> Air Force One	<input type="checkbox"/> Food
<input type="checkbox"/> Avalon Nursing Home	<input type="checkbox"/> Gluten Free
<input type="checkbox"/> Brooke's Pet Shop	<input type="checkbox"/> Non Carbonated
<input type="checkbox"/> Costco	<input type="checkbox"/> Organic
<input type="checkbox"/> Durfrain Law Office	<input type="checkbox"/> Water
<input type="checkbox"/> Erik's Gun and Knives Shop	
<input type="checkbox"/> Gavyn's Roller Coaster Park	
<input type="checkbox"/> Jet Service Hanger	
<input type="checkbox"/> Marla's DayCare	Category Type:
<input type="checkbox"/> Maxx Hair Salon	Current Category in Product List

## Sales Tax - eData Sales Tax Rpt

Toucan can compute sales tax information for you using the transaction data and vends from the card readers in your machines. The eData Sales Tax Rpt is the report you can run to compute sales tax on sales for a given date range you supply. The report is dynamic, which means it is computing the sales tax data as it runs. So if you run the report and then make changes to your data and run the report again, you will get different results based on the changes you made. This makes it convenient if you discover that you entered a tax rate incorrectly or linked a product to the wrong tax type. You can make the correction and then run the report and the report will incorporate your fixes on the fly. The report doesn't require sales tax information to run, you can run it and still use the information that it supplies but without sales tax information it just can't compute any sales tax. So let's go through what sales tax information you need to supply so the report can do all of its computations.

**Tax Types** – Sales Tax laws and statutes are infinitely varied between different locations. So to be as flexible as possible Toucan allows you to create your own Tax Types. Tax Types are the categories, types, or groups that different products fall into when deciding how those products are taxed. For example, in one location if a product is carbonated it may be taxed with a different rate than a non carbonated product. Or a product that is considered a beverage is taxed differently than a product that is considered a food or a snack. In these examples the tax types would be Carbonated, Non Carbonated, Beverage, Food, and Snack. You can check with the tax authority in your area to discover what the different types of tax are that you might have to deal with. Usually this data is available for you online at the tax authority's website.

**Edit Product**

Show Working Locations

\*Name:   Active

Calories/Serving:

Tax Type:

Category:

Storage Type:

In your Product List as you create or edit your products you can create your own custom tax types and assign those tax types to your products.

**Custom Tax Types**

	Tax Type	Active
<input type="checkbox"/>	Carbonated	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Whole Nuts	<input checked="" type="checkbox"/>

Any 'Active' tax types you add in the Custom screen will show up in your Tax Types drop down list of your Edit Product screen. To Add a new tax type to your custom list, click the Add Tax Type button in the custom screen and you will get a new row where you can add the new tax type. To remove a tax type you can

make it inactive by un-checking its active box, or delete it by clicking the delete button next to it. Then click save to save all your changes at once.

### Define Tax Rates and Location Default

As you create your product list all you are doing is categorizing what group the products fall into for tax purposes by assigning the tax type. You are not providing any rate information on the product list and that is because a product could be charged a different rate depending on which location it was sold from even though it is the same product. Since different locations can have different rates for the same product, the rate information is actually assigned at the location level. So as you create your location list you can use the Sales Tax tab on the location edit screen to define the tax rates for the different tax types you create and document when those rates are effective for that location.

The screenshot shows the 'Edit Location' window with the following details:

- Name:** Abbots Sports Lounge
- Contact:** [Empty]
- Days Of Business:** [Empty] (Days Of Biz)
- Locator:** [Empty]
- Date Found:** [Empty]
- Active:**

The **Sales Tax** tab is active, showing a table with the following data:

	Effective Date ▲	Tax Type	Tax Rate (.04700 = 4.7%)
<input type="checkbox"/>	01/01/2016	Location Default	0.06255
<input type="checkbox"/>	07/01/2016	Whole Nuts	0.07216
<input type="checkbox"/>	07/01/2016	Carbonated	0.07116
<input type="checkbox"/>	08/15/2016	Whole Nuts	0.08156
<input type="checkbox"/>	08/15/2016	Carbonated	0.08146

Using the Tax Types button on the edit location screen will also open the same Custom Tax Types screen so you can edit the tax types you want to use and control what shows up in your Tax Type drop down.

Clicking the Add Rate button will create a new row on the tab so you can define the new effective date and tax rate for a selected tax type. Clicking any of the column headers will sort your tax rate info by that column – image above is sorted by Effective Date ascending.

In the example above we are using two different custom tax types – Whole Nuts and Carbonated. Products with whole nuts as their tax type are taxed differently than other products as well as products that are considered carbonated. We have one additional Tax Type

**'Location Default'**. This is a system tax type that is created for you. Toucan will use the tax rate you define for the Location Default type and apply it to any product vended at this location that DOES NOT already have a tax type defined in the product list. So using the data in the image above, any transactions that come in after 1/1/16 for a product that does not have a tax type defined; Toucan will compute its tax using a rate of 6.255%. Whole Nut and Carbonated products will not have a sales tax computed until after 7/1/16 when a rate of 7.216% will be used for whole nut products and a rate of 7.116% will be used for carbonated products. Products with no tax type defined still use the Location Default of 6.255% which was effective 1/1/16. Then on 8/15/16 whole nut products will be taxed using rate 8.156% and carbonated products will be taxed using 8.146%. Products with no tax type defined continue to use the same 6.255% that was effective 1/1/16. Each location can define its own tax rates for the tax types you create or the Location Default rate. The Location Default tax type is created so that you can apply a rate to any products that you have not defined a tax type for in the product list.

So if you are in a location that has simple tax rules and everything gets taxed at one rate, regardless of what it is, you don't have to define tax types in your product list. You could leave the tax type blank for all your products. Then at your locations just create one row in the sales tax tab using the Location Default tax type and enter what that rate is and when to make it effective and you are done. All products (since none of them have a tax type) will be taxed with the default location rate for that location.

As tax rates change, and they do, just enter the new tax rates with the new effective dates so if the Location Default rate needs to change on a certain date, just add a new row and use the new effective date and the new rate – you do not, nor should you, delete the old rates. This way the sales tax tab also becomes your tax rate history for each location and the sales tax report will have all the historical tax info if you ever run it for an older date range. You can enter future tax rates with future effective dates and Toucan will not use the new rates until their defined effective date.

With this tax information in place the eData Sales Tax Rpt can now pull together the card reader transactions that take place within the date range you supply, group them by Location, Machine,

Begin Date: 08/01/2016 End Date: 09/01/2016 [Configure Rpt](#)

Adjust Sales Tax - Compute Tax by first removing Sales Tax before calculation

[Generate Tax Rpt](#) [Collapse All](#) [Expand All](#) [Export to Excel](#) [Export to PDF](#)

	Source	Product	Tax Type	Qty	eCash	eCredit	eRevenue	Rate	Effective	Sales Tax
UnLinked Locations										
UnLinked Machines										
	ePort	UnLinked Products		59	\$21.50	\$30.75	\$52.25			\$0.00
Abbotts Sports Lounge										
Abbotts Sports Lounge										
	ePort	Apple Chips	Location Default	2	\$0.00	\$2.00	\$2.00	0.06255	01/01/16	\$0.13
	ePort	Apple Slices	Location Default	5	\$1.00	\$4.00	\$5.00	0.06255	01/01/16	\$0.31
	ePort	Bargs Natural Root Beer	Carbonated	4	\$0.00	\$9.00	\$9.00	0.07116	07/01/16	\$0.64
	ePort	Bargs Natural Root Beer	Carbonated	3	\$0.00	\$6.75	\$6.75	0.08146	08/15/16	\$0.55
	ePort	Blue Diamond Almonds	Whole Nuts	2	\$1.00	\$1.00	\$2.00	0.07216	07/01/16	\$0.14
	ePort	Blue Diamond Almonds	Whole Nuts	7	\$1.00	\$6.00	\$7.00	0.08156	08/15/16	\$0.57
	ePort	Bugles	Location Default	7	\$0.00	\$7.00	\$7.00	0.06255	01/01/16	\$0.44
	ePort	Cheese Peanut Butter Cracker	Location Default	5	\$1.75	\$7.00	\$8.75	0.06255	01/01/16	\$0.55
	<b>Cnt:154</b>			<b>Qty:691</b>			<b>\$778.45</b>			<b>\$17.72</b>

and Product. Then aggregate the number of products sold, separate out the cash and the credit amounts, compute the gross revenue for each product within the tax effective dates for each location, find the tax rate that was effective for the transaction date and compute the sales tax

for that product. Any transactions that Toucan cannot link to a Location and Machine when it loads and processes eData are grouped in the Unlinked group which shows up at the top (these have a status of 'Unlinked' in the Raw eData screen). We are showing 59 unlinked transactions between 8/1/16 and 9/1/16. The transactions that do link up and process are grouped together by Location and Machine and sorted by Product, Tax Type, and Effective Date. Notice the sort icons on the column headers – you can change these if you want.

*If you wanted to sort the list so that the highest selling products for each location were first and then the list went down to the lowest selling products so you could quickly see the highest and lowest selling products for a location – you can use this report even if you are not using it for tax purposes. First turn off the sorting for the columns already sorted by clicking the column headers of those columns until the sort turns off and the icon disappears. With the sort turned off for all of the columns now you can apply your own sort. First click on the Qty header to sort ascending, click once more to sort descending and the best selling products now come to the top within each machine group. Now that Qty is sorted, click the Product header so the product names will now be sorted alphabetically within the Qty sort. This could then give you an idea of products that you might want to move around to other locations or machines where that product is selling better.*

Back to sales tax, in the example above, between 8/1/16 and 9/1/16 our Abbots Sports Lounge machine sold 2 Apple Chips, and 5 Apple Slices. These products do not have a Tax Type defined so the Location Default type was used with a rate of 6.255% that we defined for this location. We sold 7 Bargs Natural Root Beers but 4 were sold before 8/15/16 and 3 were sold after. So for the 4 that sold before, since these transactions took place after 7/1/16 but before 8/15/16 00:00 they get taxed at a rate of 7.116% for the carbonated tax type at this location and then for the 3 sales that took place after 8/15/16 00:00 Toucan uses the rate of 8.146% that we defined for carbonated products effective 8/15/16 for this location. Same thing with the Blue Diamond Almonds except Toucan is using the rates defined for the whole nut tax types since this product has the whole nut tax type defined. Toucan does this on the fly as the report runs so if we changed any of the tax rates or effective dates for the Abbots Sports Lounge location and re-generated the report, we would see different results based on the changes we made.

There is one more option that Toucan gives us on this report.

The **Adjust Sales Tax** option – If the box is not checked, then Toucan just does a straight calculation by taking the gross eRevenue (which Toucan computes very similarly as the LineTotal and LineAmount columns on the Raw eData and Revenue Rpt screens) and multiplying by the tax rate. If the box is checked Toucan does an extra step before computing the tax. It does a preliminary calculation to figure out how much tax is in the eRevenue number and it removes that amount first and then uses the adjusted eRevenue number to multiply with the tax rate to get the Adjusted Sales Tax. So you don't pay tax on the tax. You can choose either way you prefer to calculate the rate and toggling back and forth you can see how much of a difference it makes in your particular case.

Like other reports or search screens the eData Sales Tax report also gives you some aggregate totals in the footer.

- Cnt – is the total number of transactions that were retrieved
- Qty – is the total number of products sold during the date range supplied
- eRevenue – the total computed gross revenue – **Sales Tax and Refunds** – this revenue number is reduced by any refunds that were issued and processed. Meaning credit card

refunds (If you leave cash at a location for refund purposes you will want to document that). The Raw Revenue and Raw eData screens also process refunds and reduce the revenue, however the data from the eData card readers is not sufficient for Toucan to be able to find the actual transaction itself that was refunded, therefore the sales tax report does not know which transactions or products ultimately resulted in a refund so it cannot go through all of the product sales that may have resulted in a sales tax calculation and remove that sale and its tax. Toucan will do its best to link the refund with the location and machine that the refund was issued for and it groups the refunds accordingly so you have the information that you can use to then go through the sales for that machine and reconcile any refunds if needed for tax purposes.

## Customizing Options



At the very right edge in the header row at the top you should see your name with a little down arrow next to it. Hovering over your name with your mouse will give you a drop down menu with some options in it

This is available in both the Portal and in Toucan.

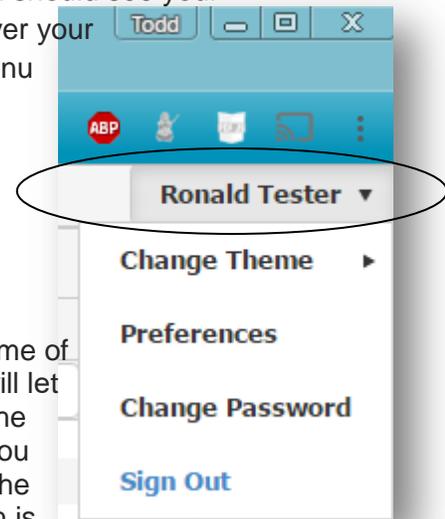
### Picking a Theme

The first option is to 'Change Theme'. This lets you customize or change, a little bit, the look of Toucan. There are several themes you can choose from. Some of them are ugly and some of them are quite cool... I will let you choose which ones are which. As you change the theme it will affect not only the colors but the icons you see, the tabs on windows, the buttons on windows, the overlay animation graphic that you see when Toucan is working or retrieving data for you 'the spinner', even the color of the text you see could be lighter or darker.

Themes can be fun and you should check the list every once in a while as we will be doing new themes, or holiday themes when in season, just to give you some variety for those who like to switch things up every once in a while.

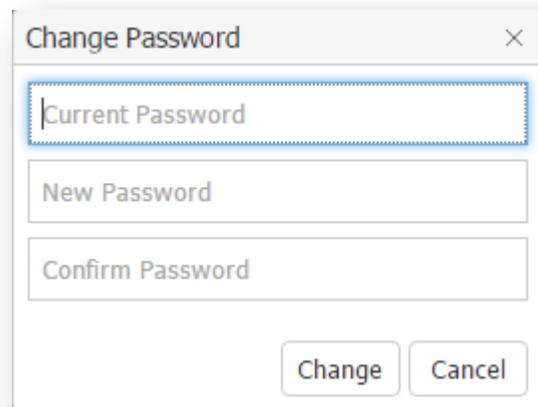
### Preferences Window

This is a coming soon attraction... this will be where you can make additional customizations as Toucan continues to grow and improve in features and functionality.



### Change Password

You are not required to change your password and your password is not set to expire at any time but you may want to change it from time to time (or not). But if you did test out a mobile device at Best Buy and you did login to your Toucan VMS software so you could see how the device looked and worked with Toucan or Toco and you are not sure if you told that browser to remember your credentials or not... then here is your safety net.



You can change your password... just supply your Current Password so Toucan can check and make sure the person doing this change is the same person that knows the current password in the first place – just in case the person at Best Buy who picks up the device you were just using and discovers the gold mine of fun they now have and they opt to teach you a lesson and lock you out of your VMS software by changing your password – we can foil them. It's not like I

would have ever done this to someone who left their facebook account logged in at a public area and I will deny any knowledge of things like this, but changing a password is a nice way of sort of scaring someone without doing much damage to them... cough cough.

After supplying the valid original password, type in your new password and then type the new password in again in the Confirm Password and click Change. If the Change Password box closes then your password was updated successfully. Be careful while at electronic stores.

*Your password for the HealthyYOU online support center and for the eManage cloud are originally setup to be the same as a convenience. But they are independent of each other. You can change your password for one and it will not change your password for the other.*

## Sign Out

This is probably the most self explanatory option in all of Toucan. In the VendingZoo Portal area we discussed how Toucan uses encrypted cookies to keep you logged in for up to 10 hours. If that cookie gets deleted or when it expires you have to login again. This is a balance of convenience and security. Toucan tells the browser to delete its cookies if the browser gets closed, so as long as that browser stays open (even if the tab Toucan was on is closed down) you will not have to login again for up to 10 hours. When you click Sign Out you are forcing the cookie to be deleted, so this is how you can lock things up on demand. You may want to do this if someone asks if they can borrow your device and you just don't want to risk them accidentally doing something. You don't even have to close down all of the tabs that are open. You could have Toucan open on 3 tabs and the portal open on a 4<sup>th</sup>. As soon as you sign out from any one of them, none of them will work, even if they stay open. You will see 'Unauthorized' if you attempt to do anything.

Toucan is designed to be a simple yet powerful VMS software tool to serve you – it is doing a lot of work to help keep you up to date and accurate so you can focus on growing your business, finding the right product combinations in your machines and monitoring your locations. At VendingZoo.com we look forward to your input as we watch Toucan and Toco continue to fly higher in features and functionality.

Thank You

VendingZoo.com Team