STOCK VISITS

Quick Tip

Accidentally logged an item in error? Don't worry! It can be deleted after the header screen.
Simply navigate back to the Stock Visits screen, open the visit you created, and you will see a red minus button appear. You will be able to select the item and confirm the deletion.

Completing the Cash Section

In the Stock Visit, you'll find the **Cash** section.

- Tap on the **Machine Name | Machine Name** field to open the Cash Count screen.
- Enter the **Float** and the **Actual Cash** remaining in the cash drawer after completing the cash count.
- Tap **Save** to return to the Stock Visit screen and select the **Cash Bag** number that accompanies the cash collection.

How to Scan a Cash Bag

To scan a cash bag, it must have a barcode.

Select the **Scan Barcode** button to open your camera. Wait for the barcode within the scanner to appear. Once it appears, hold the barcode steady in the scanner and it will automatically scan. Confirm with pressing the Cash Bag field.

Quick Tip

The first time you select "Scan Barcode", "You will need permission to access camera" will appear. Select "Allow" to grant permission. Without this permission, the scanner will not be able to function.

If you don't permission, you will not be able to scan barcodes, or take photos.

Completing the Counters Section

Select Counters from the Stock Visits screen to open the Counters section to complete the readings. If a Previous Counter value is shown, it's either the first visit or the value was never entered before.

Enter the current counter reading into the Counter field. If the value has been reset, ticket Yes. Enter the Reset Counter value if applicable.

If the counters mechanism is remaining, you can leave it as it is. If the counters mechanism is being replaced, ticket Yes and enter the Replacement Counter value.

Completing the Custom Counters Section

Select Custom Counters from the Stock Visits screen to open the Custom Counters section to complete the readings. If a Previous Value is shown, it's either the first visit or the value was never entered before.

Enter the current counter reading into the Counter field. If the value has been reset, ticket Yes. Enter the Reset Counter value if applicable.

If the counters mechanism is remaining, you can leave it as it is. If the counters mechanism is being replaced, ticket Yes and enter the Replacement Counter value.

Completing the Products Section

The products section allows you to add product information. For each product, you need to fill in Product Number, Locked, Reserved, Wasted, and Counted.

- **Product Number** is the product being sold.
- **Locked** is the number of product in the vending machine and reserved to your customer.
- **Reserved** is the number of product in the vending machine and reserved to your customer.
- **Wasted** is the number of product that was wasted.
- **Counted** is the number of product in the vending machine, determining the stock level after the completed transaction.

To add the product quantity, click the product name. The left bar will turn to a number where you can enter the product quantity. Click the product name again to close.

How to Scan a Product

To scan a product, ensure that the product barcodes are saved in SmartVend. Otherwise, you'll need to manually input the product information, as scanning will not work.

Select the **Scan Barcode** button to open your camera. Wait for the barcode within the scanner to appear. Once it appears, hold the barcode steady in the scanner and it will automatically scan.

Completing the Tickets Section

In the Stock Visit, you'll find the **Tickets** section.

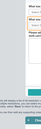
Select Tickets from the Stock Visits screen to open the Tickets section. Each ticket includes the ticket number, ticket type, and ticket status. Tap on a ticket to open the ticket details.

To create a ticket, simply select **Add Ticket**.

You will then be required to select a Ticket Type, Ticket Status and add any supporting Notes. To enter a Cash Collection ticket, select the Cash Collection option.

To close a ticket, simply select **Close Ticket**.

To enter a Cash Collection ticket, select the Cash Collection option.



To enter a Resolution ticket, select the resolution option.

After selecting all the necessary details, select **Close Ticket** to finalise and close the ticket within the stock visit.

Quick Tip

Unlike with a **Service Fill**, Ticket Cause will stay assigned to the operator and will not reset. This allows for tracking of the same issue across multiple visits, ensuring better data accuracy.

Completing the Notes Section

Within the visit, navigate to the **Notes** section to add any relevant details regarding the visit ahead. The Notes will be a free text additional information, or note, for you to review the visit by.

Completing the Photos Section

While the visit, use the **Photos** section to upload any required images. You can upload up to 5 photos.

Select "Add Photos", you will be prompted with "Allow Photos to access your photos", select **Yes**.

After selecting the photo you want to upload, tap on the image to view another photo. After selecting the photo, select **Add Photos** to upload the photo.

You can view the uploaded photo in the **View Pictures** section in the main menu.

After selecting "Add Photos", you will be prompted with "Allow Photos to access your photos", select **Allow**. Without this permission, you will not be able to add photos.

To remove an uploaded image, tap on the x in an enlarged image. Tap "Delete Image" to confirm the deletion. Tap "Cancel" if you don't want to remove the image.

Quick Tip

Unlike with the Notes section, **Cash Photo** has an edit mode which allows you to remove or add photos and notes. Allow the permission to take and upload photos.

Completing the Signature

After completing all mandatory details in each section, select "Submit" to send the visit to completion.

Cancelling a Visit

If you cannot complete the visit, you can select to cancel it. Select cancel this visit.

This will allow you to provide the reason for a cancellation screen. Type in the text, and following select all capture options (Signature, Photos and Notes) and select Save and Cancel Visit.

After selecting the reason, select "Finalise" to confirm the visit cancellation. You'll be returned back to the machine list, and the visit will show as "Cancelled".