# **PLANNING - STOCK VISITS**

What are Stock Visits?

that machines are consistently stocked with the products customers want to purchase

A Stock Visit is a routine or scheduled visit performed by a vending machine operator to ensure

# While there are no restrictions on who can maintain and update, you will need a **Stock** license to

**Restricted Access** 

**Mandatory Fields** 

If a section is marked as mandatory on a visit sheet, you must complete all required fields within

**Indication of Incomplete Sections:** • Red Header: Sections with incomplete mandatory fields will have their section headers turn red. This visual cue indicates that there are issues that need to be addressed before you can complete the visit sheet.

complete stock visits.

**Completing the Cash Collect Section** 

## Enter the Refunded field to confirm any refunds given back to the site

entered, it will default to the Previous Counter value.

Previous Total Vends

**Previous Total Cashles** 

**Bag Number** 

No Bag Number

Cash Collect (Mandatory)

Refunds Given

Total Cash

Previous Total Cash

0

**Completing the Counters Section** Each counter has a 'Previous' value, referring to the last recorded value for the machine. If no Previous Counter value is shown, it's either the first visit or the value was never entered before.

## For telemetry machines, this will be read only, and will be populated by the latest audit received

**Previous Total Sales** 

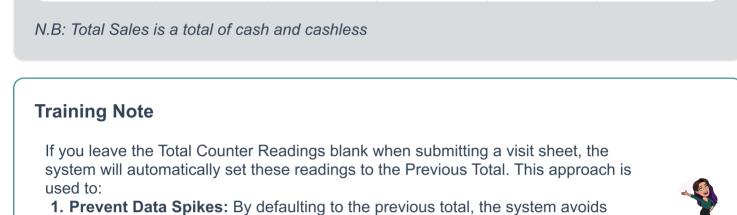
**Previous Total Free Vend** 

from the machine. Counters (Mandatory)

Enter the current reading from the machine in the relevant counter field. If no value has been

0 Previous Total Free Vend

**Total Sales** 



creating any sudden or unrealistic spikes in counter readings, which could be due

2. Maintain Consistency: Ensures that the data remains consistent and reflects

The Custom Counter section will only be populated if the machine has a custom counter added to its planogram. Previous Counter Values: Each custom counter field has a 'Previous' value, which corresponds

**Completing the Custom Counters Section** 

Custom Counters

# the same value as the 'Previous' reading to avoid discrepancies.

Leave Blank: If you are not taking a specific counter reading, you can leave the field empty,

• Mandatory Fields: If a field is marked as mandatory, you must enter a value. You can enter

## • Loaded: Number of singles added to the machine. • Returned: Number of singles removed from the machine and returned to your default location. • Wasted: Number of singles removed from the machine but not returned to your default

location.

Selection Number

visit.

Operations.

outcome of the ticket.

review.

photos.

option.

Movements Report.

Products (Mandatory) Enter Product Counters

applicable). **Completing the Ticket Section** 

In the **Tickets** section of a service visit, you can: 1. View Assigned Tickets: See all tickets that have been assigned to the visit and need to be resolved. 2. Check Latest Comments: Review the latest comment associated with each ticket, which may provide additional details about the fault or issue that needs to be addressed.

# **Close Ticket**

1. Confirm the Fault: You can select the specific fault that caused the ticket. This field is

2. Select the Resolution Code: Choose the code that best describes the resolution of the issue. This field is also optional but provides valuable data for reporting and analysis.

**Note:** Fault Codes and Resolution Codes are set up in the **Administration** section under

☑ Refer this ticket to the back office team for final closure **Close Ticket** When closing a ticket, you must:

**1. Enter Notes:** This section is mandatory, so you need to include text describing the details or

2. Refer to Back Office Team (if applicable): If the option is enabled in your system settings (Manage Account → System Configuration → Ticket Dashboard Settings → 'Enable Ticket Final Closure Referral'), you can select "Refer this ticket to the back office team for final closure." This will mark the ticket as Completed and notify the back office team for final

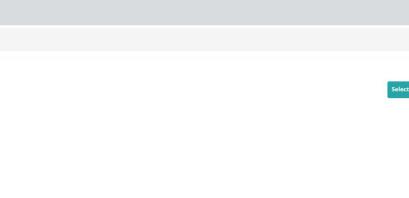
**Completing the Notes Section** In the **Notes** section of the visit sheet, you can capture any specific details or observations

related to the visit. This might include: • Observations: Any noteworthy findings during the visit. • **Instructions**: Additional instructions or details relevant to the service performed. • Recommendations: Suggestions for future maintenance or parts replacement. **Customer Feedback:** Any feedback from the customer or machine operator.

# In this section, you can view and remove any uploaded photos. To add a photo, select "Select

Photo" which will open your computers file locations.

Photos (Mandatory)



## ongoing usage patterns rather than showing abrupt changes that might need further investigation.

to errors or omissions.

unless it is marked as mandatory.

sections: Loaded, Returned, Wasted, and Counted.

Product Name

during the stock visit. Here's how to handle this process:

when the visit sheet is submitted.

Product SKU 10

1. Enable Product Counters:

**Total Vends** 

to the counter reading from the last stock visit sheet for this machine. **Entering Counter Readings:**  Actual Reading: If you take a new reading from the machine, enter it into the relevant counter field.

**Training Note** To view and analyse custom counter readings, you can use the Machine Counter

**Completing the Products Section** 

The products listed are from each machine's planogram. For each product, you need to fill in four

• Counted: Defaults to the product's Capacity in the planogram, determining the stock level

## Products section is enabled. This activates fields for entering counter data. 2. Enter Counter Readings: • Total Vends: Enter the total number of vends for each product selection number. This indicates how many times the product was dispensed from the machine.

• Total Free Vends: Enter the total number of free vends for each product selection number. This shows how many times the product was dispensed without charge (if

When your organisation requires counter readings, you need to accurately record these counters

• Checkbox: If your organisation takes counter readings, ensure the checkbox within the

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Ticket Type: Service Call

optional but helps in documenting the issue for reporting purposes.

When you select 'Close Ticket', you will be prompted to:

This section helps ensure that all relevant issues are addressed and resolved during the service

What was the cause of this ticket? Select Some Options Select Some Options

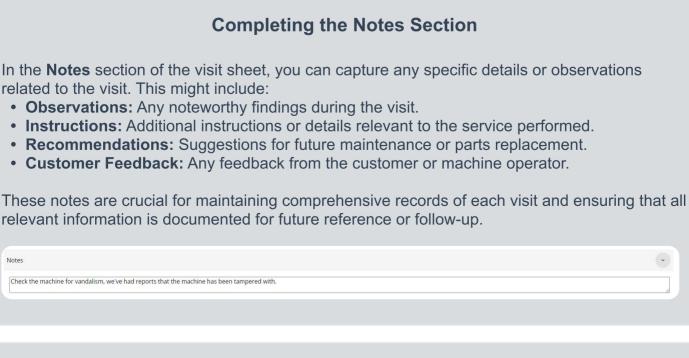
The planogram prices were updated - no matching fault/resolution code to

Please add some brief remarks about work carried out

**Note:** The option to refer the ticket to the back office team will only be available if this feature is enabled in your system configuration. **Training Note** Visits with a **Service Fill Ticket Type** will carry over to the assigned operator's schedule and will **not** move to the Action Required list. These visits will remain on the operator's route, updating to the current day until they are either completed or reassigned.



After selecting the photo, you view it within the photos section, and can, if needed, remove any photos that have been uploaded. Simply select the photo you wish to delete and use the removal



# that section to successfully submit the visit. If you attempt to submit the visit sheet without filling out these mandatory fields, the system will prevent submission.

# In the Stock Visit, you'll find the Cash section • If you collect cash from a machine, enter **Bag Number** that matches the collection bag used • Enter the **Float** to set the level of cash remaining in the coin mech after completing the cash