

Quick Start Guide

Welcome to the ShelfX family



shelfx

Installation

What you will need

Power Source

Internet Connection: Cellular or Wired

Tablet/Smart Phone/Computer



Connectivity



Step One: Connect fridge to power source.



Step Two: Connect fridge to Internet.

There are two options for Internet connectivity: wired and cellular*.

-For a wired connection, connect the network Ethernet cable to the Ethernet port of the electrical box.

-For a cellular connection, connect the cell dongle to the USB port of the electrical box.

Additional connectivity information is located on page 6 of the Owners Manual. Electrical box location can be found in the refrigerator manual.

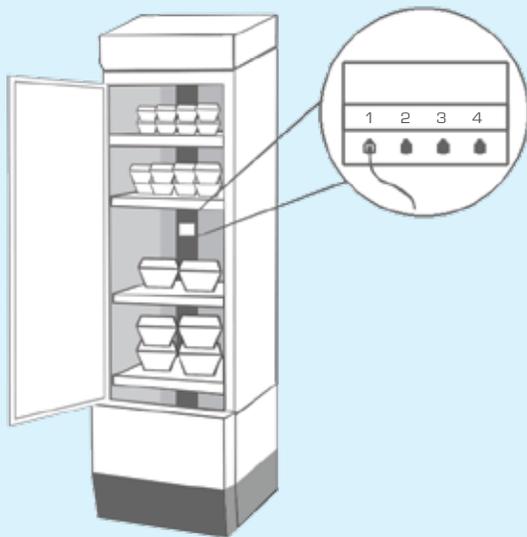
* If cellular service is required please call ShelfX at +1(855) 4-ShelfX to order your cellular dongle. There is a one time device charge plus a monthly cellular fee.



Ethernet



Cellular



Shelves

Step Three: Install wire racks.

Insert wire racks using provided mounting clips. Shelf spacing should be determined by product height.

Step Four: Install Shelves.

There are two types of shelves, 1 kg and 4 kg. Placement should be determined by the product weights, 4 kg shelves should be used for heavy items, and 1 kg shelves for light items.

Next connect the shelf wires to the jacks in the rear of the fridge.

-Shelves must be connected in the same order they are arranged in the fridge e.g. the top left shelf to the top left jack.

The shelf sensors are sensitive. Use caution when installing shelves to avoid damage. Shelves should also be transported with proper protection.

Activation

Registration

Step Five: Register for your accounts.

Go to register.shelfx.com to register for Xmanager and Xconfig accounts. Here you will also enter your bank information in order to receive weekly ACH Payments. After completing the registration you will receive a welcome email with your registration information and a request to file a W-9. Funds will not be transferred until a completed W-9 is received by ShelfX.



The screenshot shows a web browser window with the URL register.shelfx.com. The page title is "ShelfX Sherpa" and there is a "Logout" button in the top right. The main heading is "Merchant Registration". Below the heading, it says "Welcome to ShelfX. This page is for you to create a new merchant account." The form contains several input fields: "Business Name", "Email", "Password", "Desired Company ID", and "Contact Name". Below the "Desired Company ID" field, there is a note: "Company ID should be a word or short phrase (no spaces) that will be used as the sub-domain to access your management portals, e.g. company_id.xmanager.us."



The screenshot shows the "ShelfX Configuration" app interface. The main heading is "SHELFX CONFIGURATION SHELFX". On the left, there is a navigation menu with options: Home, Locations, Location Groups, Fixtures, Fixture Profiles, Devices, Shelves, Employees, Employee Types, Settings, and Merchant Account Manag... The "Locations" option is selected. The main content area is titled "New Location" and has a "Test Mode" toggle. The form includes fields for "Location Name", "Location Description", "Address" (two lines), "City", "Country" (with a dropdown menu showing "United States"), and "State" (with a dropdown menu showing "TX").

Activating the Fixture

Step Six: Create a new location.

Before activating the fixture a new location must be created in the Xconfig App. This is done by going to: [\[Company_ID\].xconfig.us](http://[Company_ID].xconfig.us) and logging into your account. Navigate to the Locations page, select "New Location", then enter the location information.

Detailed information about Xconfig and creating a new location is located on pages 8-9 of the Owners Manual.

Step Seven: Enter the activation code.

In the Xconfig App navigate to the Fixtures page. Confirm that the correct location is listed at the top of the page and click "Activate Fixture".

- If the incorrect location is selected the location can be changed by clicking "Change Location" before activating.
- If the fixture is activated in the wrong location the fixture can be moved to another location by selecting "Move Fixture" in the fixture details page.

Detailed information about activating and moving a fixture location is located on pages 9-11 of the Owners Manual.



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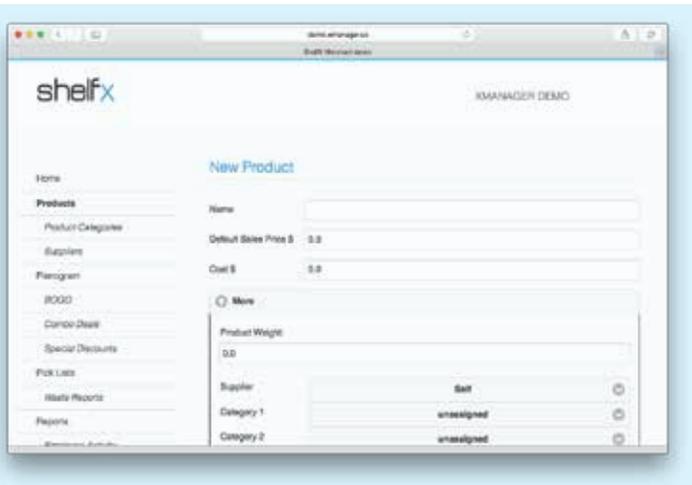
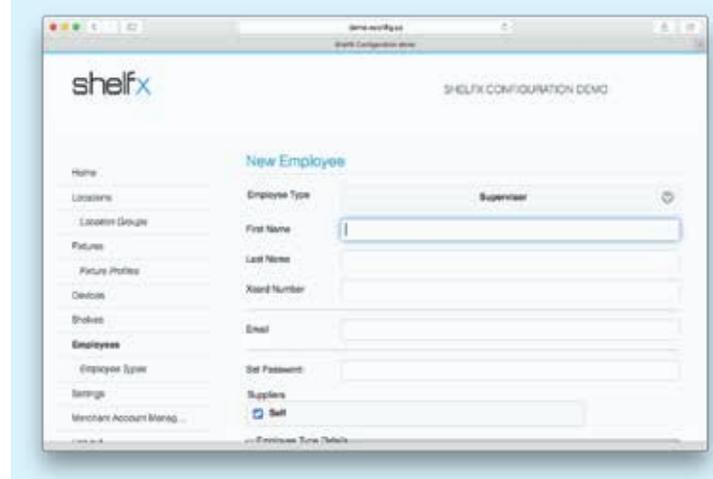
Programming

Employee Accounts

Step Eight: Create employee accounts.

Employee accounts must be created in order to log into Xmanager. This is done by navigating to the Employees page and clicking “Add New Employee”. Here the employee details can be entered, an xcard must be assigned to an employee in order to stock the fridge. There are two default employee types, additional employee types, can be created by navigating to the Employee Types page and selecting “New Employee Type”. Here you can select different levels of access for employee types.

Detailed information about employees and employee types is located in the Owners Manual.



Products

Step Nine: Create new products.

The first step of programming a new fixture is product creation. This is done in the Xmanager App accessed by going to [Company_ID].xmanager.com and logging in with an employee account. After navigating to the Products page, click “New Product”. Here product the information can be entered and saved. Clicking “More” provides access to supplementary product information as well as creating and assigning product categories.

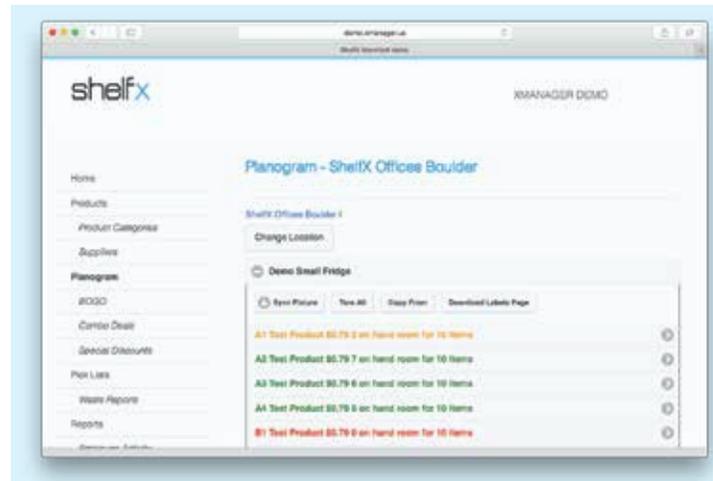
Detailed information about Xmanager and products is located in the Owners Manual.

Planogram

Step Ten: Assign products and stock shelves.

An Employee Xcard must be waved to unlock the fridge. In the Xmanager App, the Planogram page is used to assign products to specific shelves and calibrate shelves to new products. From the Planogram Summary page, select a shelf to edit, and assign a product to the shelf, from your product list, then click “Save Planogram”. Select the shelf again and click “Calibrate” to start the calibration tool. After all shelves have been calibrated select “Sync Fixture” from the summary page.

Detailed information about assigning products to shelves, the Planogram, and calibration tool is located in the Owners Manual.



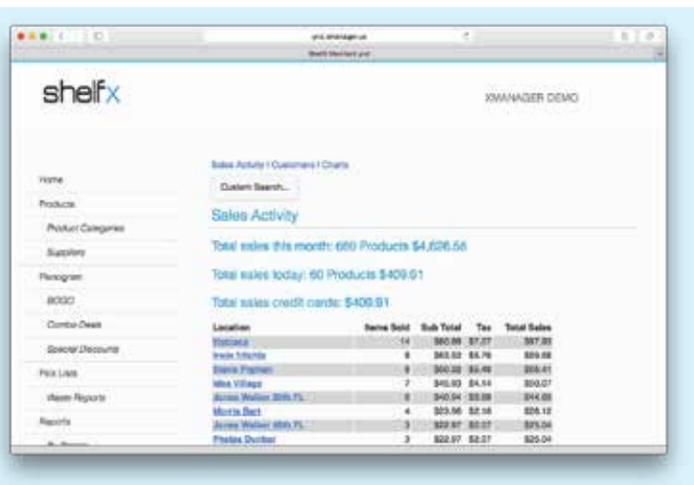
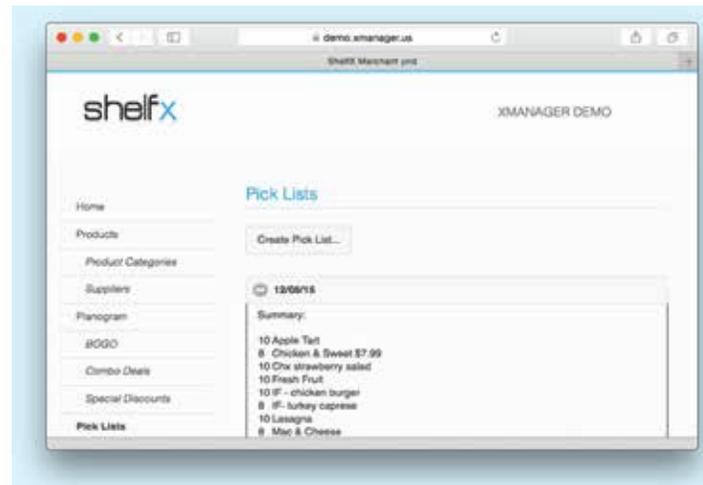
Ongoing Operations

Restocking

Step Eleven: Restock the fridge.

In order to restock the fridge an employee Xcard must be waved to unlock the fridge. In the case that the product on the shelf is not being changed, additional inventory can simply be added to the fridge. If a new product is being added to a shelf it must be assigned to the shelf, saved, and recalibrate. After restocking is complete select "Sync Fixture" from the Planogram Summary page. Pick lists can be generated in Xmanager, showing exactly what items and quantities are needed to restock a fridge.

Detailed information about restocking and Pick Lists is located on pages 28-29 of the Owners Manual.



Reports

Step Twelve: Review machine activity.

In Xmanager there are several different tools available for viewing and analyzing the activity of a selected fixture. After navigating to the Reports page there are a variety of reports available for Employee Activity, Sales Activity, Inventory, PDF Statements, Charts, and Product Analysis.

Detailed information about restocking and Pick Lists is located on pages 30-31 of the Owners Manual.

Customers

Step Thirteen: Access customer information.

Customers can be searched for in Xmanager by: Name, Xcard number, Email Address, or Phone Number. Selecting the customer from the list of results allows access to customer information, transaction history, as well as the ability to charge or credit a customer. Specific items can also be refunded directly from the Customers Transactions list.

Detailed information about customer refunds is located on pages 31-32 of the Owners Manual.



+1-855-4-ShelfX

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