Automated Inventory Solutions, Inc.

Keeper Care System

Data Manager

Version 1.2.22

User Manual

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1 GLOSSARY OF TERMS

Bins	Site for holding products in the vending machine.
Card Group Number	The number assigned to a particular group at a facility.
Card ID Number	The unique number on a card for employees using the Keeper vending machines.
Card Manager	Option for adding and activating Card ID Numbers and Card Groups. Also, used for linking Card IDs with Card Groups.
Customer Department	Departments within a facility using the Keeper Care Data Management System (Keeper Care System).
Customer Location	Sites using the Keeper Care System.
IP Address	An identifier for a computer or device on a TCP/IP network. This will be the identifiers for the computers connected to the Keeper Care System. The format of an IP address is a 32-bit numeric address written as four numbers separated by periods. Each number can be zero to 255. For example, 1.160.10.240 could be an IP address.
Keeper Machines	Vending machine-like units that use a swipe-card, barcode and proximity technology. Keeper Care System links with the Keeper Machines.
Machine Bins Manager	Screen for linking all products to the Keeper machine bins & Drawer Keeper modules. Product #, description, price, and other information are added here.
Machine Manager	Used for adding and updating Keeper machines using the Keeper Care System.
Microsoft Excel	A spread sheet application.
Microsoft Word	A word processing application.
Product Manager	Enter and update product information here.
Security Manager	Used for managing the users of the Keeper Care System.
Settings Manager	Feature for (delete) Configuring Customer Location, Customer Department, Customer Name, and Status & Transaction Timer.
TCP/IP Network	Transmission Control Protocol/Internet Protocol, the suite of communications protocols used to connect hosts on the Internet. This is the standard for transmitting data over the Internet.
User Manager	Enter employee user names here and link with the card ID numbers.
User or Employee ID	Number assigned to employees, typically by their employer for identification purposes.

2 OVERVIEW

Thank you for purchasing the **Keeper Care Data Manager System (Keeper Care System)**! This manual provides basic information about the **Keeper Care System** and contains easy-to-follow, step-by-step procedures for using the system.

The Keeper Care System is an automated, inventory data management solution designed to assist facilities across the country with effective and cost-efficient inventory control. Tools, equipment, and supplies are made available in a vending machines-like unit where employees swipe their personal cards to obtain the materials needed for their work day. The Keeper Care System is a Windows-based software program that links to the Keeper vending machines for accurate inventory management.

3 SYSTEM REQUIREMENTS

The Keeper Care System operates on IBM compatible computers with 200MHz Pentium central processor. It is designed to run in the Microsoft Windows XP, Vista and 7 environments.

The Keeper Care System is not guaranteed to be compatible with computers running Windows emulation (e.g. Apple Macintosh).

4 HARDWARE REQUIREMENTS

The following configuration is the recommended minimum requirements for running the Keeper Care System:

1. IBM PC compatible 2 GHz Intel processor or higher,
2. 4 Gbytes of RAM,
3. 10 Gbytes available hard disk space,
4. 1024 x 768 Super VGA display.

5 GETTING STARTED

Log in to the Keeper Care System using the temporary username and password provided to you at installation and perform the following steps to reset your username and password:

1. Select **Configuration** > **Security**. The **Security Manager** screen will appear for entering your login information.
2. Make sure the **Active** check box is checked, select the role Administrator, enter your name, your account name (user name), and password.
3. The information is automatically saved in the Keeper Care system.
4. Your new login information will be activated the next time you log into the system.

You will use this same process for configuring all other users needing access to the Keeper Care System (not the card users).

If you have problems logging in to the system, email support@aisvendors.com.

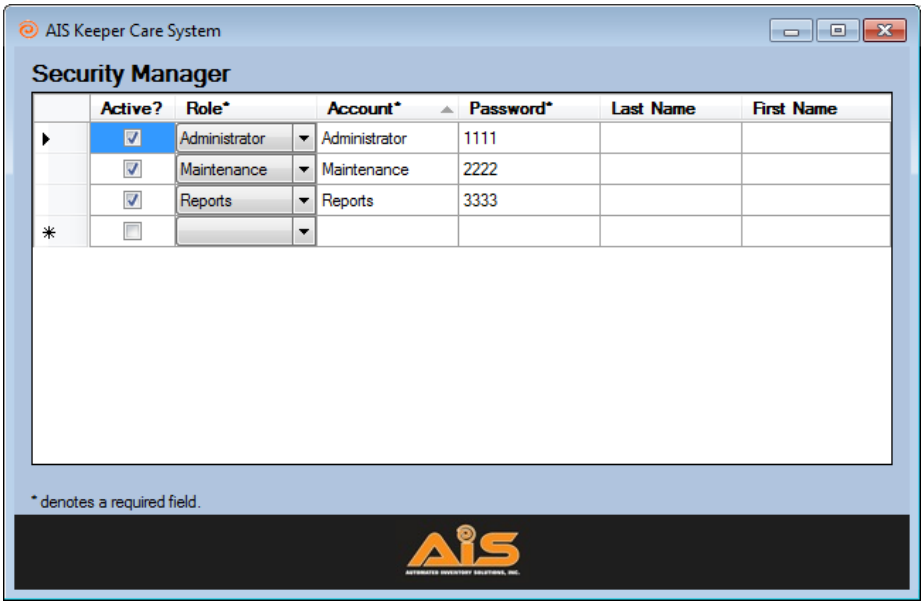


Figure 1. Security Manager Screen

6 DASHBOARD

When you log in to the system, the first screen you see is the **Dashboard**. The Dashboard is the central location for monitoring all machines configured to your Keeper Care System. You will be able to view the name of the computer, the IP Address, Location, Status, Purchases, Firmware, and the Date and Time Last Modified.

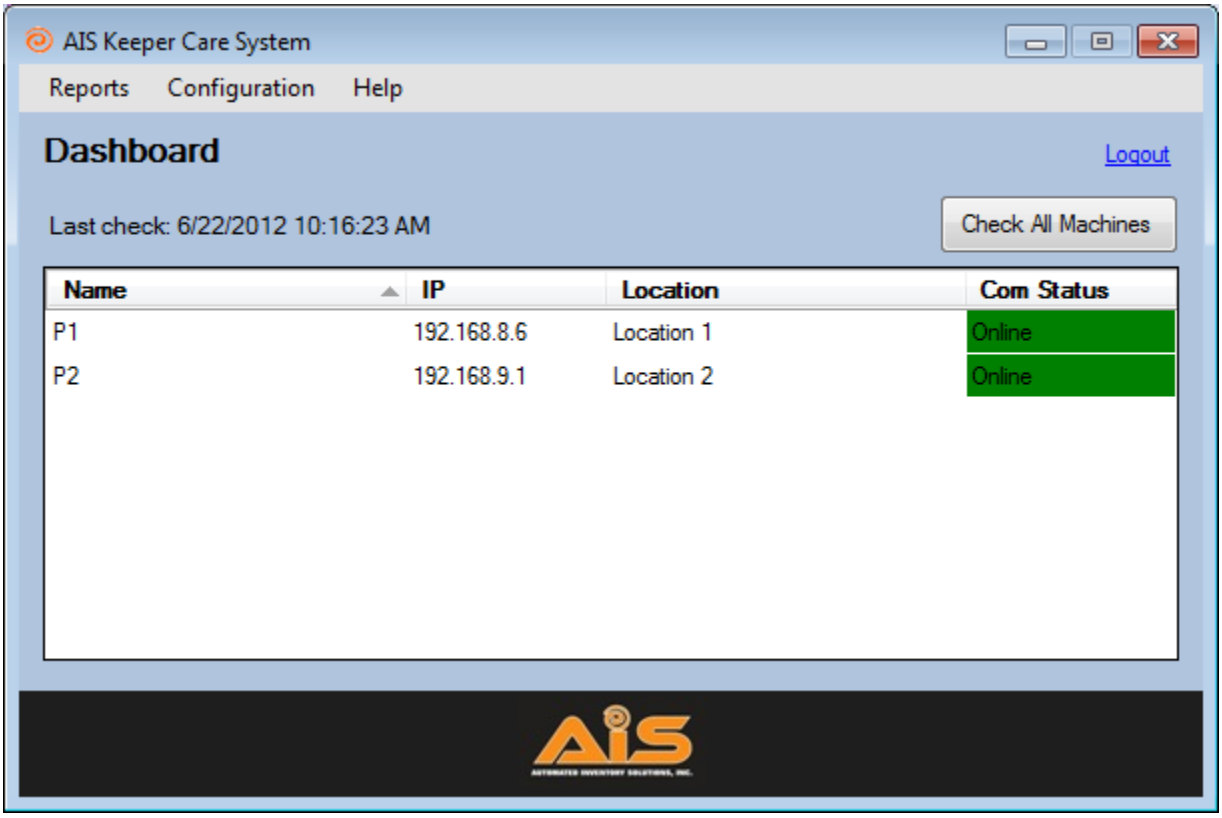


Figure 2. Dashboard of the Keeper Care System

6.1 Check All Machines

From the Dashboard, click **Check All Machines** to check the status of the machine.

6.2 Logout

Use the **Logout** feature on the Dashboard to log out of the Keeper Care System (above **Check All Machines**).

7 LOCATION MANAGER

Before adding jobs to the Keeper Machines, you will need to add the various locations using the Keeper Machines. The **Locations Manager** screen handles the company name, locations and departments. The top level of the tree is the company, the next level is the location, and the third level is the departments.

7.1 Add Location/Department

To add a new location, complete the following steps:

1. Select **Configuration** > **Locations**. The **Locations Manager** screen will appear.
2. Right click on the location/department and click **Add**.
3. Enter the name of location and hit enter. Must use unique name.
4. The information is automatically saved into the system.

7.2 Edit Location/Department

To edit the name of a location, complete the following steps:

1. Select **Configuration** > **Locations**. The **Locations Manager** screen will appear.
2. Right click on the location/department and click **Edit**.
3. Update the name of location and hit enter. Must use unique name.
4. The information is automatically saved into the system.

7.3 Delete Location/Department

To delete a location, complete the following steps:

1. Select **Configuration** > **Locations**. The **Locations Manager** screen will appear.
2. Right click on the location/department and click **Delete**.
3. You will receive a confirmation message. Click Yes.
4. The location is deleted from the system. (**NOTE**: If the location/department is in use, you will not be able to delete from the system.)

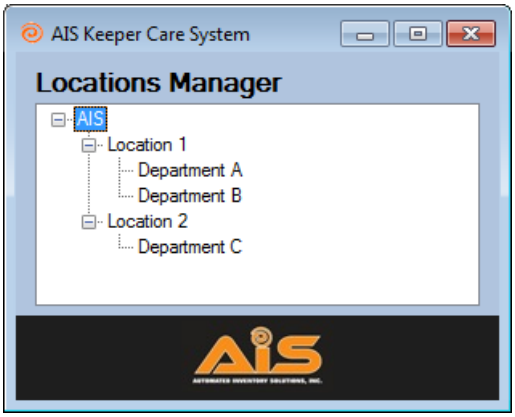


Figure 3. Locations Manager Screen

8 MACHINE MANAGER

Once you have setup the locations, departments and names, it is time to configure the machines you will be managing. To add machines to the system, complete the following steps:

8.1 Add Machines

1. Select **Configuration** > **Machines > General**. The **Machine Manager** screen will appear.
2. Enter the **Name** and select the **Location** of the machine. (**NOTE:** The Locations in the list are added under **Configuration** > **Locations**.)
3. Enter the IP address.
4. Enter the Port. (**NOTE:** The Port should always be 10001.)
5. Select MachineType (Keeper or KribKeeper).
6. The new machine is automatically added to the system.

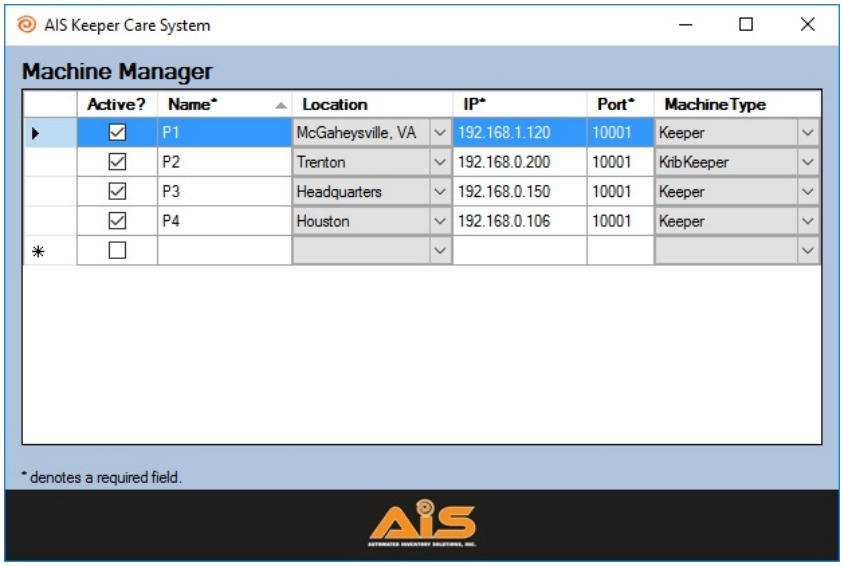


Figure 4. Machine Manager Screen

8.2 Delete Machines

To delete a machine, complete the following steps:

1. Select **Configuration** > **Machine** > **General**. The **Machine Manager** screen will appear.
2. Highlight the machine row you want to delete and press “Delete” on your keyboard.
3. Select “Yes” to confirm the deletion.
4. The machine is deleted from the system.

9 MACHINE SETTINGS MANAGER

You will use the **Machine Settings Manager** screen to manage the various settings of the Keeper machines, including, but not limited to, the keypad ID entry, minimum and maximum length of the PIN numbers, and job entry timeout.

To manage the machine settings for the various machines, select **Configuration** > **Machines** > **Settings**. Select the machine using the drop-down arrow and update the various settings.

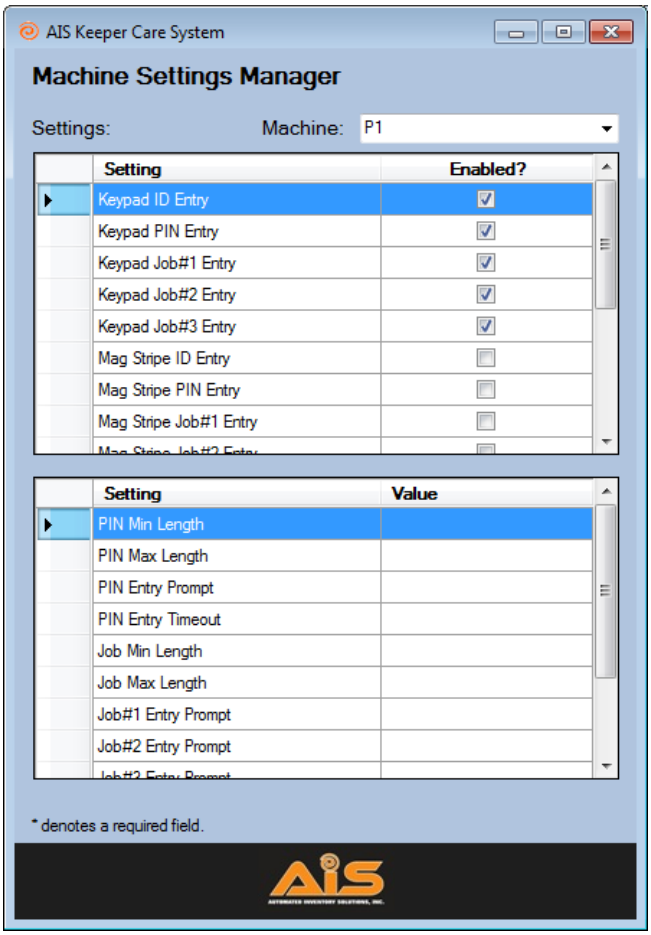


Figure 5. Machine Settings Manager Screen

Have a question? Email: support@aisvendors.com or call (304)725-4801.

Checkbox Settings	Description
Keypad ID Entry	Enable login using ID on Keypad
Keypad PIN Entry	Enable PIN login on Keypad
Keypad Job#1 Entry	Enable Job#1 entry on Keypad
Keypad Job#2 Entry	Enable Job#2 entry on Keypad
Keypad Job#3 Entry	Enable Job#3 entry on Keypad
Mag Stripe ID Entry	Enable login using ID on Mag Stripe
Mag Stripe PIN Entry	Enable PIN login on Mag Stripe
Mag Stripe Job#1 Entry	Enable Job#1 entry on Mag Stripe
Mag Stripe Job#2 Entry	Enable Job#2 entry on Mag Stripe
Mag Stripe Job#3 Entry	Enable Job#3 entry on Mag Stripe
Scanner ID Entry	Enable login using ID on Scanner
Scanner PIN Entry	Enable PIN login on Scanner
Scanner Job#1 Entry	Enable Job#1 entry on Scanner
Scanner Job#2 Entry	Enable Job#2 entry on Scanner
Scanner Job#3 Entry	Enable Job#3 entry on Scanner
Allow Multiple Vend	Enable multiple vending selection per login
Allow Any Job#	Enable allow any job number. (Disable job number enforcement)
Reset Item Per Weeek on Sunday	Reset vending limit count on Sunday instead of using the vending count from the last 7 days.

Textbox Settings	Description
PIN Min Length	Default: 1
PIN Max Length	Default: 10
PIN Entry Prompt	Default: ENTER PIN
PIN Entry Timeout	Default: 15 Timeout period in seconds
Job Min Length	Default: 1
Job Max Length	Default: 20
Job#1 Entry Prompt	Default: ENTER JOB#
Job#2 Entry Prompt	Default: ENTER JOB#
Job#3 Entry Prompt	Default: ENTER JOB#
Job Entry Timeout	Default: 15 Timeout period in seconds
Select Entry Prompt	Default: ENTER SELECTION
Select Entry Timeout	Default: 30 Timeout period in seconds
Use Job# as Part Number	Default: 0 Utilize Part Number for selection through scanner. Vending machine will vend right after part number is scanned. Use Value: 0 = Not utilize Part Number for selection 1 = Use Job#1 as Part Number entry 2 = Use Job#2 as Part Number entry 3 = Use Job#3 as Part Number entry Notes: Use this option after the Job# you have, or it will skip any Job# prompt. If you don't utilize the job, then the value should be 1. Scanner Job#1 Entry on above section should be checked. If you have 1 job#, then the value should be 2. Scanner Job#1 Entry and Scanner Job#2 Entry on above section should be checked. If you have 2 job#, then the value should be 3. Scanner Job#1 Entry, Scanner Job#2 Entry and Scanner Job#3 Entry on above section should be checked.

10 CARD MANAGER

After you have added Machines in the Keeper system, it is now time to setup the Card IDs and PIN numbers (optional), and assign them to the appropriate Keeper Machines.

10.1 Add Card IDs

To add card IDs to the Keeper Care system, complete the following steps:

1. Select **Configuration** > **Cards**. The **Card Manager** screen will appear. The Card Manager screen contains the following two tables: (1) Available Cards for entering new **Card IDs** and assigning a **PIN** (optional), and (2) **Machine Assigned Cards** table for assigning Card IDs to a machine,
2. Select the **Machine** you want to configure. (Located at the top left of the **Card Manager** screen under "Card Manager".)
3. Highlight an empty row in the Card ID table (under **Available Cards**).
4. Double click under the **Card ID** column.
5. Enter the Card ID you want to add and then enter the PIN (optional) to be assigned to the Card ID.
6. The new Card ID is automatically saved in the system.

10.2 Assign Card ID to Machine

To assign card IDs to a machine, complete the following steps:

1. Highlight the Card ID and click the arrow button. >>
2. The Card ID will be assigned to the Machine selected.
3. The information is automatically saved in the system.

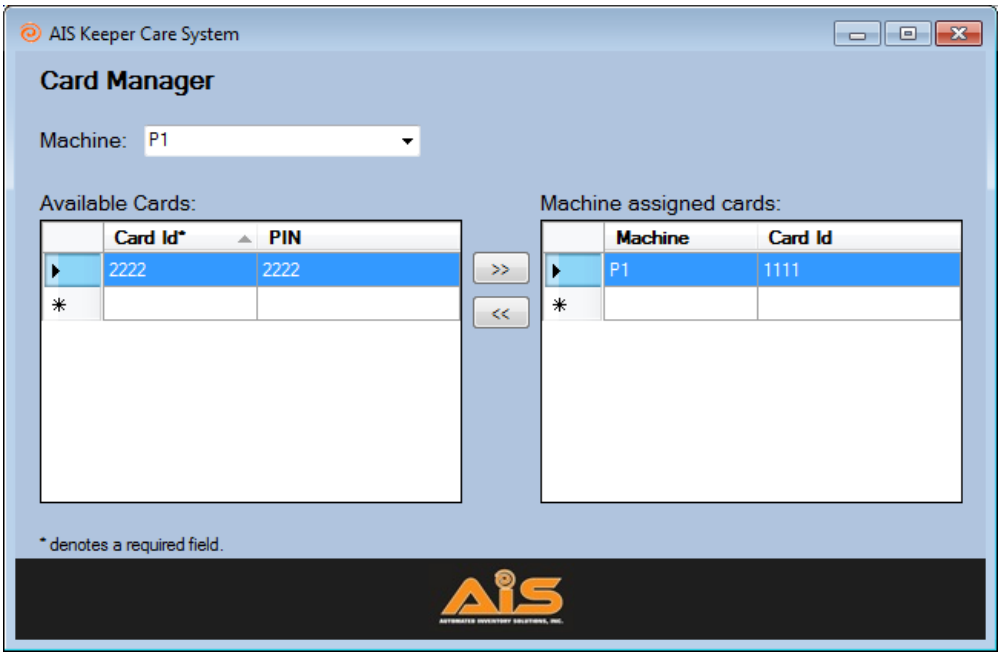


Figure 6. Card Manager Screen

Have a question? Email: support@aisvendors.com or call (304)725-4801.

10.3 Un-assign Card ID to Machine

To un-assign a card ID from a machine, complete the following steps:

1. Highlight the row under “Machine assigned cards” and click the following arrow button:
2. The Card ID will be removed from the machine it was assigned to.
3. The information is automatically saved in the system.

10.4 Modify Card IDs

To modify a Card ID, complete the following steps:

1. Select **Configuratio**n > **Cards**. The **Card Manager** screen will appear.
2. Highlight the card ID you want to modify.
3. Enter the changes in the text entry boxes.
4. The changes are automatically updated in the system.

10.5 Delete Card IDs

To delete a card ID, complete the following steps:

1. Select **Configuratio**n > **Cards**. The **Card Manager** screen will appear.
2. Highlight the card ID you want to delete.
3. Highlight the name you would like to delete under **Setting**s, and press “Delete” on your keyboard.
4. Select “Yes” to confirm the deletion.
5. The location is deleted from the system.

11 USER MANAGER

Use the **User Manager** screen to configure all Keeper Care card users. To configure the users, complete the following steps:

11.1 Add Users

To add users, complete the following steps:

1. Select **Configuration** > **Users**. The **User Manager Screen** will appear.
2. Check the **Supervisor?** if user is exempted from any vending limit.
3. Enter the **Name** of the user.
4. Select the **Card** ID number and enter the **User ID (optional).**
5. Select the **Department**.
6. The new users are automatically added to the system.

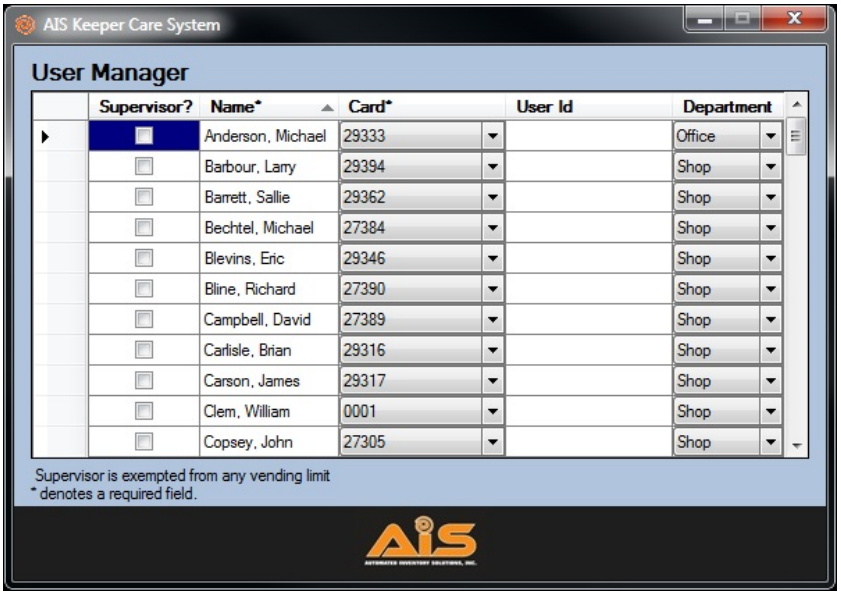


Figure 7. User Manager Screen

11.2 Delete Users

To delete users, complete the following steps:

1. Select **Configuration** > **Users**. The **User Manager Screen** will appear.
2. Highlight the row of the user you want to delete.
3. Press “Delete” on your keyboard.
4. Select “Yes” to confirm the deletion.
5. The user is deleted from the system.

Once you have successfully activated the cards in the system by linking them to the appropriate users, the cards are ready for distributing.

12 GROUP MANAGER

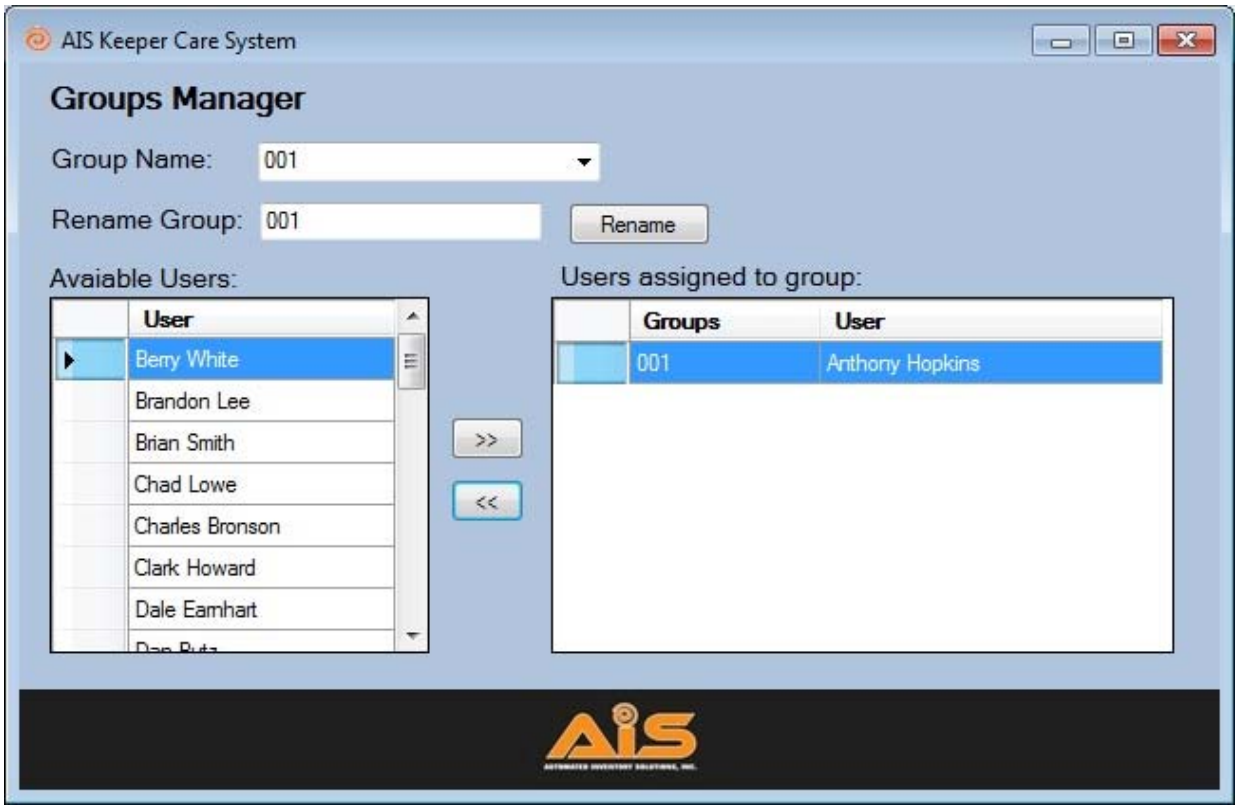
Use the **User Manager** screen to configure user group. Group is used in **Machine Bin Manager** to manager bin permission.

To configure a group, select **Configuration** -> **Group Manager**. The **Group Manager** screen will appear.

By default, Group name are set from 001 to 100.

Group Name can be changed by editing the text to **Rename Group** and then click **Rename**.

Select a **Group Name**, click **> >** button to add a user and **< <** to remove a user to/from selected group.



13 VENDOR MANAGER

Before assigning products to the Keeper Machines, you will need to add the various vendors that supply your equipment for efficiently managing the inventory of your Keeper machines. To add a new vendor, complete the following steps:

13.1 Add Vendors

To add vendors, complete the following steps:

1. Select **Configuration** > **Vendors**. The **Vendor Manager** screen will appear.
2. Enter the **Name** and **Phone** number of each vendor on the next available blank line.
3. Make sure the **Active** box is selected.
4. The information is automatically saved in the system.

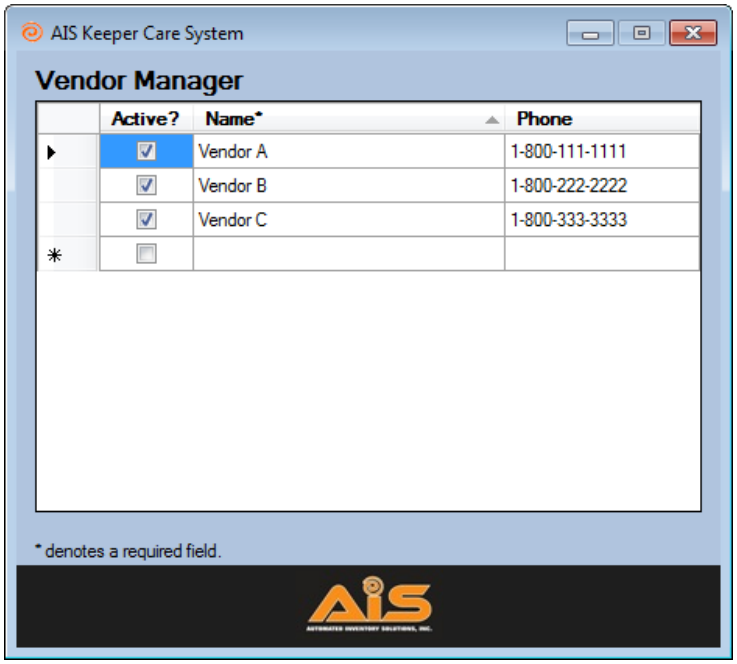


Figure 8. Vendor Manager Screen

13.2 Delete Vendors

To delete vendors, complete the following steps:

1. Select **Configuration** > **Vendors**. The **Vendor Manager** screen will appear.
2. Highlight the vendor row you want to delete and press “Delete” on your keyboard.
3. Select “Yes” to confirm the deletion.
4. The vendor is deleted from the system.

14 PRODUCT MANAGER

The **Product Manager** screen is for entering and updating the descriptions and prices of your Keeper machine inventory.

14.1 Add Products

To add a new product, complete the following steps:

1. Select **Configuration** > **Products**. The Product Manager screen will appear.
2. Enter the part number of the product under **Part Num,** and add the **Description**.
3. Select the appropriate vendor from the drop-down list of vendors. (Add vendors using the **Vendor Manager** Screen.)
4. Enter the **Package Quantity** and the **Price**.
5. Finally, enter the **Order Quantity**. The Order Quantity is the number ordered each time to replenish the machine.

Any updates to the product information can made by highlighting the Product and double-clicking on the cell you want to update. Updates will be automatically uploaded.

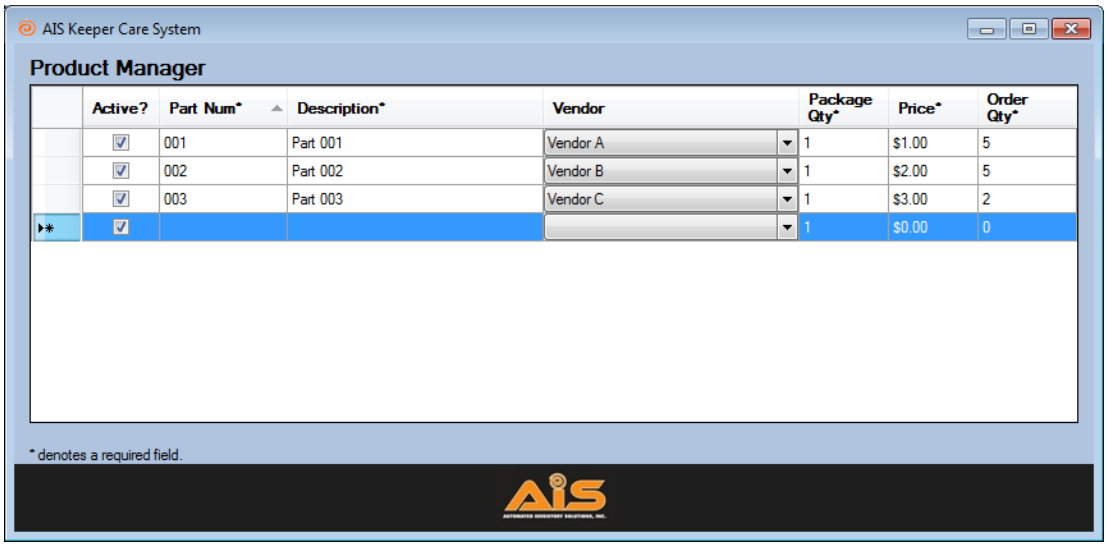


Figure 9. Product Manager Screen

14.2 Delete Products

To delete products, complete the following steps:

1. Select **Configuration** > **Products**. The **Product Manager** screen will appear.
2. Highlight the product row you want to delete and press “Delete” on your keyboard.
3. Select “Yes” to confirm the deletion.
4. The product is deleted from the system.

(**NOTE:** You cannot delete a product if there are transactions linked to it.)

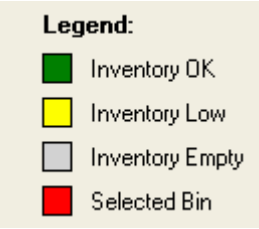
15 MACHINE BINS MANAGER

The Machine Bins Manager screen is where you will manage your Keeper bins and modules. Bins and modules are holding sites for all of the products found in the Keeper machines.

15.1 Bins

To assign a product to a bin number, complete the following steps:

1. Select **Configuration** > **Machines** > **Bins**. The **Machine Bins Manager** screen will appear.
2. Select the **Machine** to be configured by selecting the machine name/number in the drop-down menu (located at the top of the screen).
3. Highlight the desired bin number by clicking on the bin number box under **Machine** (a red highlight will appear to indicate the bin number box has been selected).
4. Under **Bin No.**, select the **Part No**.
5. The **Description** and the **Product Price** are automatically uploaded from the information added using the **Product Manager** screen. You can access the Product Manager screen by right-clicking on the Part No. under Bin Information.
6. Enter the current bin quantity (**Current Qty**), the minimum quantity (**Min Qty**), and the maximum quantity (**Max Qty**).
7. Check **Group Vending** if you want to limit access to the selected bin to the users in the selected group below the **Group Vending**. Group is defined in **Group Manager**.
8. Check **Limit Vending** if you want to limit the specified amount of items per day or per week for selected bin. Set the number for items/day to 0 if you do not wish to limit vending by the day. Set the number for items/week to 0 if you do not wish to limit vending by the week.
   Limit items/week by default limit the item vend for the last 7 days. There is a setting in Machine Settings called Reset Item Per Week on Sunday that allows the limit count to reset on Sunday instead of last 7 days.
9. The bin number box will change colors based on the information found in Current Qty, Min Qty, and Max Qty. See the legend below:



8. Click **Save**.

(**NOTE:** Remember to click **Save** each time updates are made to the bin settings.)

9. Note that AIS has two types of vending machines
   - Krib Keeper (See Figure 10a on next page)
   - Keeper (See Figure 10b on next 2 page)

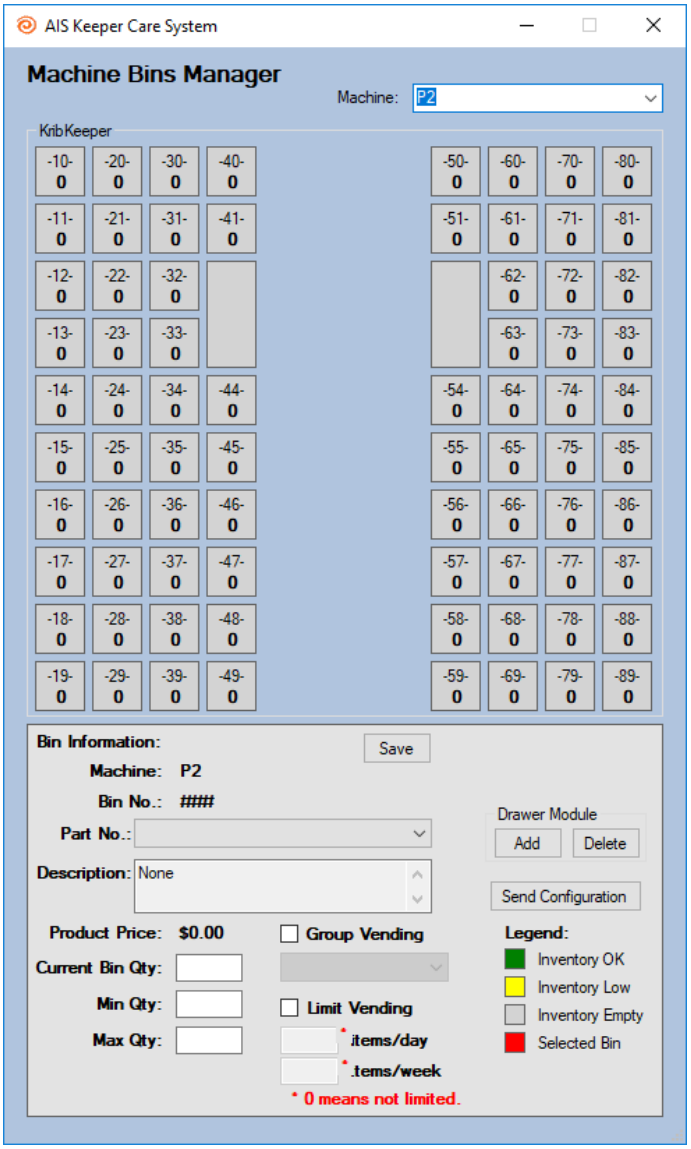
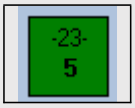


Figure 10a. Machine Bins Manager (Krib Keeper)



TIP:
The top number (i.e., -10-) is the **Bin No**.

The bottom number (i.e., 10) is the **Current Bin Quantity**.

TIP:
You can access the **Product Manager** screen by right-clicking on **Part No:** under **Bin No**.

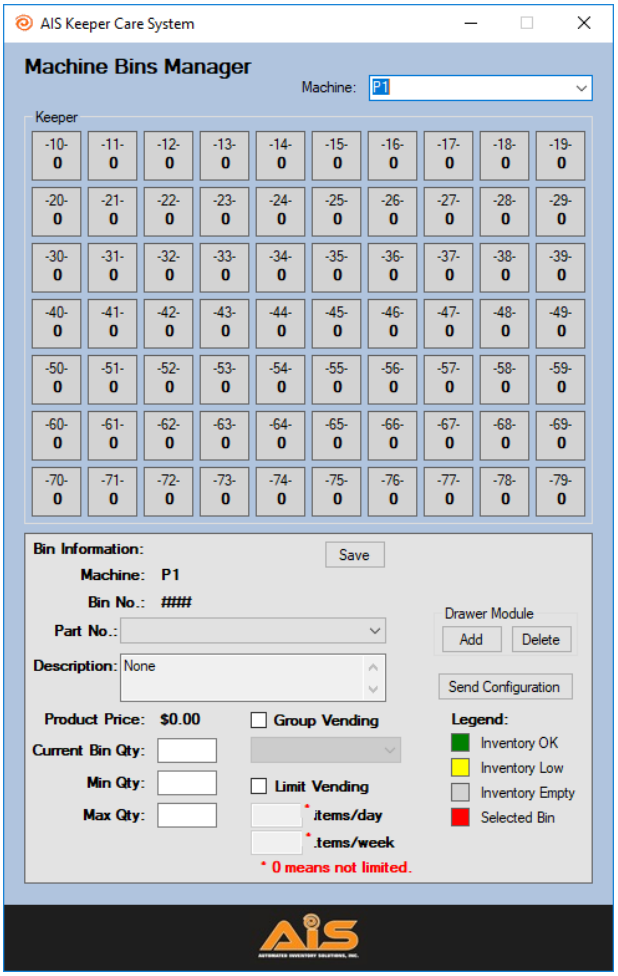
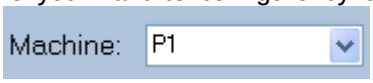


Figure 11b. Machine Bins Manager (Keeper)

15.2 Modules

Some Keeper machines have additional modules for vending products of greater size and weight. If you have this type of Keeper Machine, you will configure the modules the same way you configured the bins. To add and configure a module, complete the following steps:

1. Select **Configuration** > **Machine** > **Bins**. The **Machine Bins Manager** screen will appear.
2. Select the machine you want to configure by selecting the machine name/number in the drop-down menu. 

3. Click **Add Module**. You will receive a confirmation message asking if you want to add the new module.
4. Select "Yes".

15.3 Populate Modules

1. Select the desired Bin Number (a red highlight will appear).
2. Under **Bin Information**, select the product **Part No**. and the **Current Bin Qty**. The **Description** and the **Product Price** are automatically uploaded from the product information added using the **Product Manager Screen**.
3. Click **Save**.

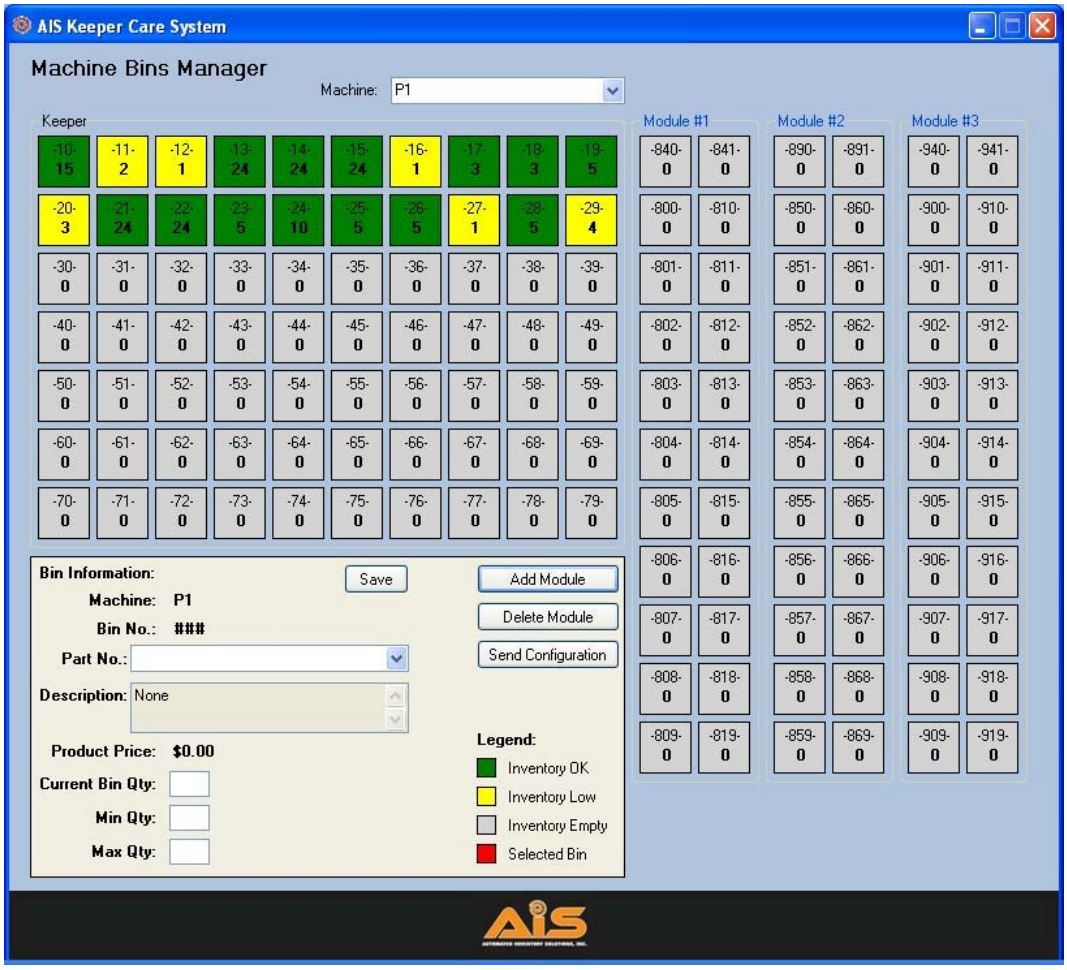


Figure 12. Machine Bins Manager – Managing Modules

15.4 Delete a Module

To delete an existing module, select **Delete Module**. You will receive a confirmation message asking if you want to delete the module. Select "Yes".

16 JOB MANAGER

The Keeper Care system allows you to assign a particular job to a vending transaction, allowing you to track product inventory related to a Job.

16.1 Add Jobs

To add a new job, complete the following steps:

5. Select **Configuration** > **Jobs**. The **Job Manager** screen will appear.
6. Select the **Location** of the job.
7. Enter the **Job** number and the **Description** of the job.
8. The information is automatically saved into the system.

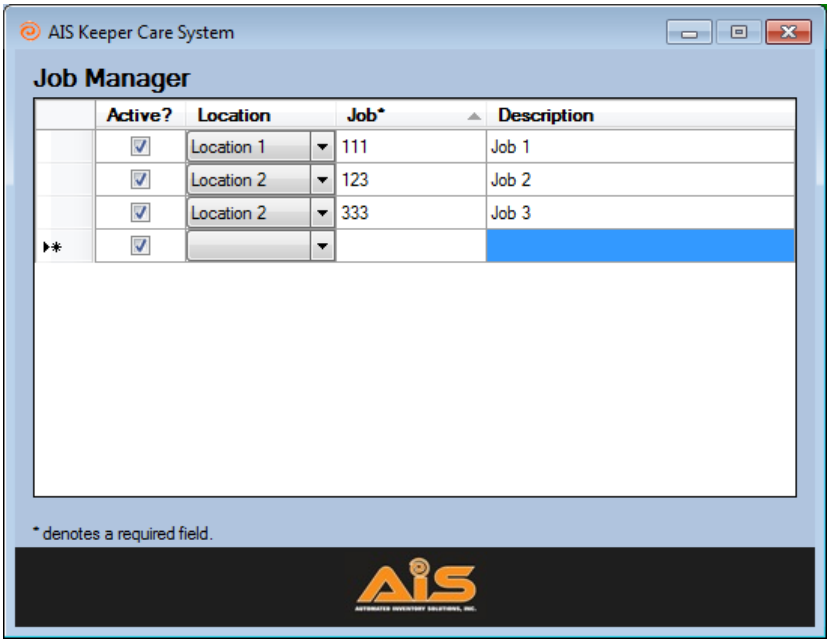


Figure 13. Job Manager Screen

16.2 Delete Jobs

To delete a job, complete the following steps:

1. Select **Configuration** > **Jobs**. The **Job Manager** screen will appear.
2. Highlight the job row you want to delete and press “Delete” on your keyboard.
3. Select “Yes” to confirm the deletion.
4. The job is deleted from the system.

17 KIT MANAGER

The Keeper Care system allows you to create a kit so multiple items can be vended in a single selection.

Each Machine can have up to 25 kits, and each kit allows up to 10 bins.
All the kits have been created with empty bin. You will need to add the bin to the kit you want to set.

17.1 Setup/Edit Kit

To setup/edit a kit, complete the following steps:

1. Select **Configuration** > **Kits**. The **Kit Manager** screen will appear.
2. Select the **Machine** that you want to set the Kit.
3. Select the **Kit** you want to set.
4. Click **> >** button to add a bin and **< <** to remove a bin to/from selected kit.
5. Click **Send Configuration** button to send the changes made to all the vending machines.
6. To change the vending sequence, click **Move Up** or **Move Down** to move a bin up or down.

* Please note that changes will not take effect until the **Send Configuration** button is clicked.
If a bin failed to vend, it will continue to vend the rest of the bin.
Failed bin vend will not be counted.

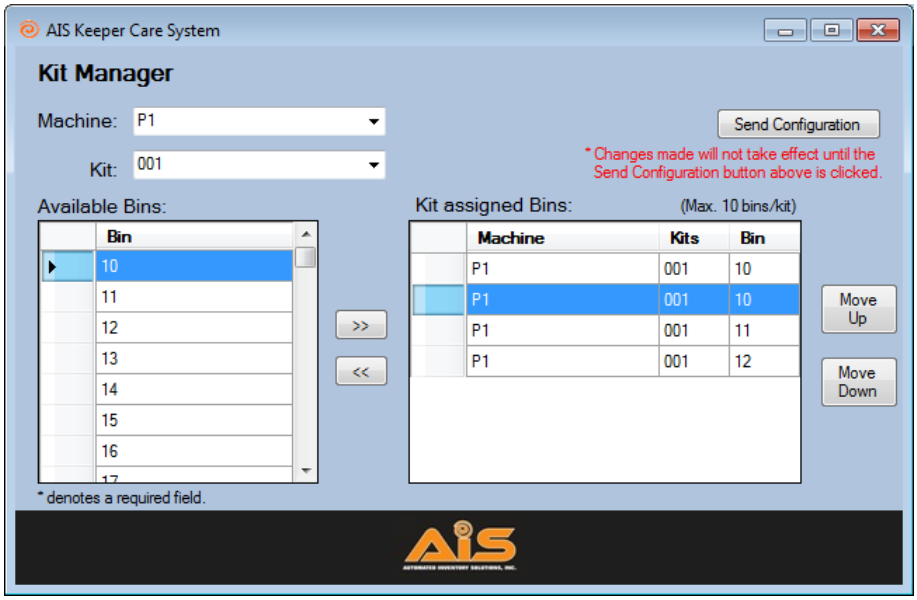


Figure 14. Kit Manager Screen

18 PRODUCT VENDING LIMIT MANAGER

The Product Limit Vending Manager screen is for entering and updating the product vending limit rules.

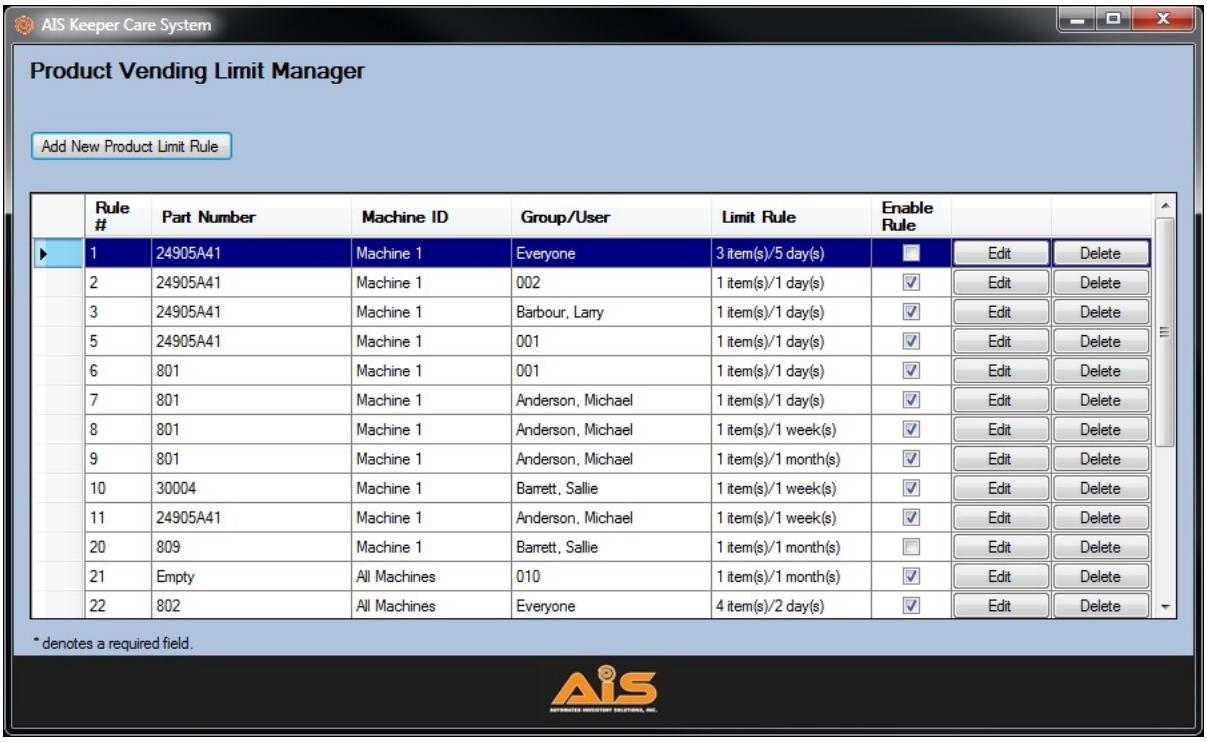


Figure 15. Kit Manager Screen

18.1 Add Product Vending Limit rule

To add a new rule, complete the following steps:

1. Select **Configuration** > **Product Vending Limits**. The **Product Vending Limit Manager** screen will appear.
2. Click **Add New Product Limit Rule** button on top left of the window.
3. The **Add Product Vending Limit Rule** screen will appear.
4. Select the **Part Number**.
5. Select the **Machine Name**. If the limit rule is to be applied on all vending machines, select **All Machines**
6. Select **Group** if the rule is to be applied on a group. Select **User** otherwise.
7. If **Group** is selected above, then select the **Group Name** for the rule to be applied.
8. If **User** is selected above, then select the **User Name** for the rule to be applied. If the limit rule is to be applied for everyone, select **Everyone**

9. Type in amount of item to be limited, number of period, and select the period type (day,week or month).
   For example:
   Limit: 1 item(s) per 1 Day(s)
   Limit: 5 item(s) per 1 Week(s)
   Limit: 15 item(s) per 1 Month(s)
10. Finally, click **Add** to add the rule. The rule screen will not reset after each addition so you can add similar rule without having to select everything from scratch.

Figure 16. Add New Product Vending Limit Screen

Notes:
- Reset button will clear all the selections and entered values.
- To close **Add New Product Vending Limit Rule** click the **X** on top right of the window.
- When **Week(s)**is selected, the transaction is counted from the Sunday.
- When **Month(s)** is selected, the transaction is counted from the first of the month.
- You will get a warning prompt when attempting to create duplicate rule.
- When the limit is reached, user will get the prompt looks like below.
  ACCESS DENIED
  LIMIT RULE #32
- The number on the error above corresponds to the number of **Rule #** on **Product Vending Limit Manager** screen .

18.2 Edit Product Vending Limit rule

To edit a Product Vending Limit rule, complete the following steps:

1. Select **Configuration** > **Product Vending Limits**. The **Product Vending Limit Manager** screen will appear.
2. Click **Edit** button next to the rule you want to edit.
3. The **Edit Product Vending Limit Rule** screen will appear.
4. Make the change according to your need.
5. Click **Update** to update the rule. Or click **Cancel** or **X** if you do not want to make any changes.

Figure 17. Add New Product Vending Limit Screen

Notes:
- Reset button will clear all the selections and entered values.
- To close **Add New Product Vending Limit Rule** click the **X** on top right of the window.
- When **Week(s)**is selected, the transaction is counted from the Sunday.
- When **Month(s)** is selected, the transaction is counted from the first of the month.
- You will get a warning prompt when attempting to create duplicate rule.
- When the limit is reached, user will get the prompt looks like below.

  ACCESS DENIED
  LIMIT RULE #32
- The number on the error above corresponds to the number of **Rule #** on **Product Vending Limit Manager** screen .

18.3 Delete Product Vending Limit rule

To delete a Product Vending Limit rule, complete the following steps:

1. Select **Configuration** > **Product Vending Limits**. The **Product Vending Limit Manager** screen will appear.
2. Click **Delete** button next to the rule you want to delete.
3. You will be prompted to confirm the deletion. Click **Yes** if you are sure to delete the rule.

19 IMPORT MANAGER

Import feature can be used to speed up the process of setting up new Keeper Care software.
Keeper Care software can import file from Excel (.xls or .xlsx) and CSV (.csv) format.
The following data can be imported into Keeper Care:

1. Import Cards

2. Import Products

3. Import Users

4. Import Vendors

To import any of the above data, click **Configuration -> Import** and select desired data to be imported.
Then click Browse to select the file and click Import to import the data.

The Excel template for the import can be downloaded from http://www.aisvendors.com/download.html.

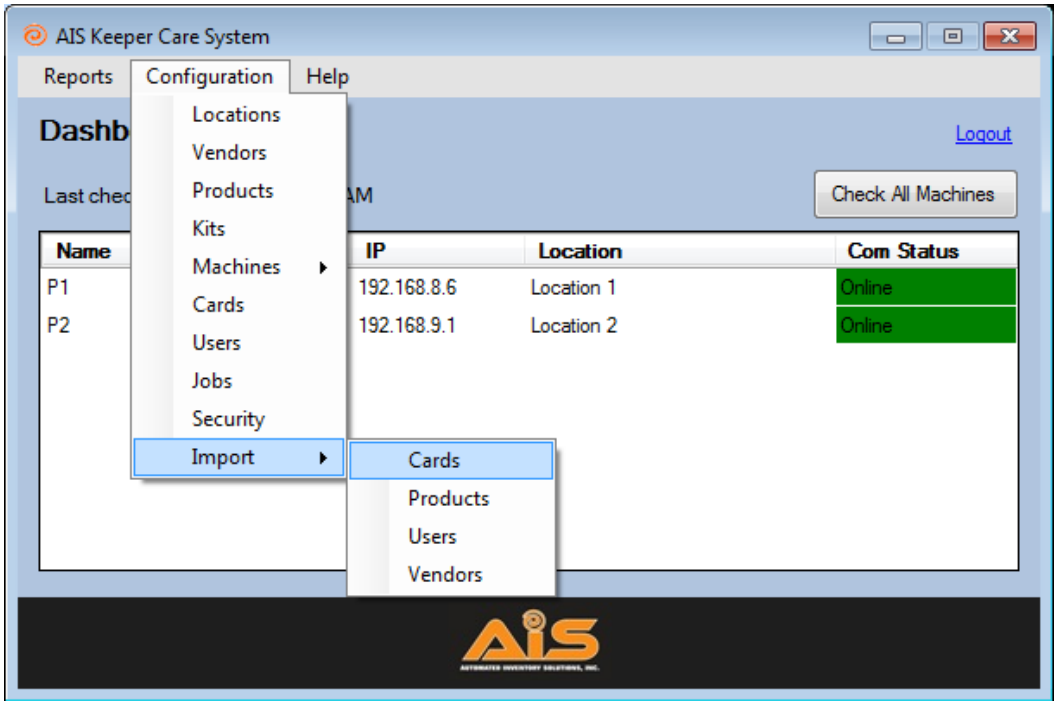


Figure 18. Import Manager Screen

19.1 Import Cards

The **Import Cards** allows you to import cards to the database. Import Cards will only import Excel or CSV file with headers shown in the image below. Red color field is required for the import to work.

	A	B	C
1	CardNumber	PIN	MachineName
2	987465		Machine 1
3	8419813		Machine 1
4	2321321		
5			

Figure 19. Excel template for Import Cards

CardNumber: Card Id used in Card Manager.
PIN: PIN used in Card Manager.
MachineName: Machine used in Card Manager.
If you have multiple machines, and you want to use the card on multiple machines, you could create multiple lines for the same CardNumber and PIN but with different MachineName.

To import cards, you will need to click **Browse** to select the Excel or CSV file you want to import, and then click **Import**.

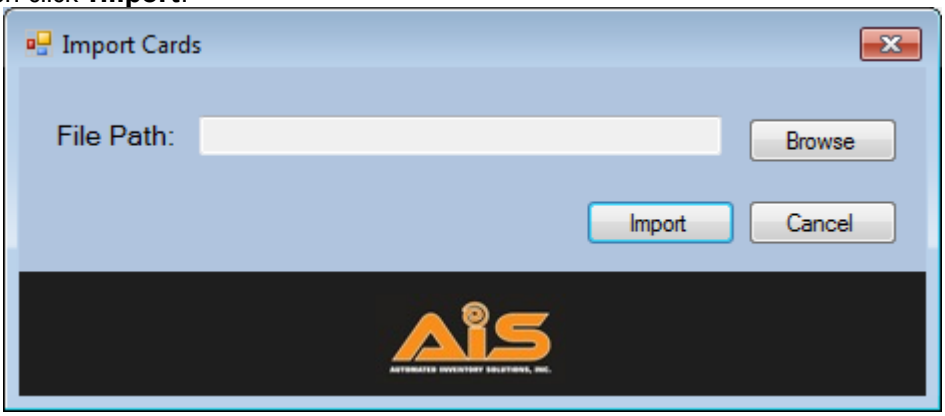


Figure 20. Import Cards Screen

19.2 Import Machine Bins

The **Import Machine Bins** allows you to import machine bins to the database. Import Machine Bins will only import Excel or CSV file with headers shown in the image below. Red color field is required for the import to work.

	A	B	C	D	E	F	G	H	I	J	K
1	MachineName	Bin	PartNum	Capacity	CurrentQTY	MinQty	GroupVending	GroupName	LimitVending	ItemPerDay	ItemPerWeek
2	Machine 1	11	FS0037	20	10	5	5	005	1	2	2
3	Machine 1	12	FS0002	20	10	5	0		0	0	0
4											

Figure 21. Excel template for Import Machine Bins

MachineName: Name of the machine used in Machine Manager.
Bin: Bin number.
PartNum: Part Num used in Product Manager.
Capacity: Max Qty used in Machine Bins Manager.
CurrentQTY: Current Bin Qty used in Machine Bins Manager.
MinQty: Min Qty used in Machine Bins Manager.
GroupVending: 0 to disable Group Vending; 1 to enable Group Vending
GroupName: Leave blank if GroupVending is 0. If not, put in the Group Name used in Groups Manager
LimitVending: 0 to disable Limit Vending; 1 to enable Limit Vending
ItemPerDay: Amount of items/day to limit. Use 0 if LimitVending is 0.
ItemPerWeek: Amount of items/week to limit. Use 0 if LimitVending is 0.

To import products, you will need to click **Browse** to select the Excel or CSV file you want to import, and then click **Import**.

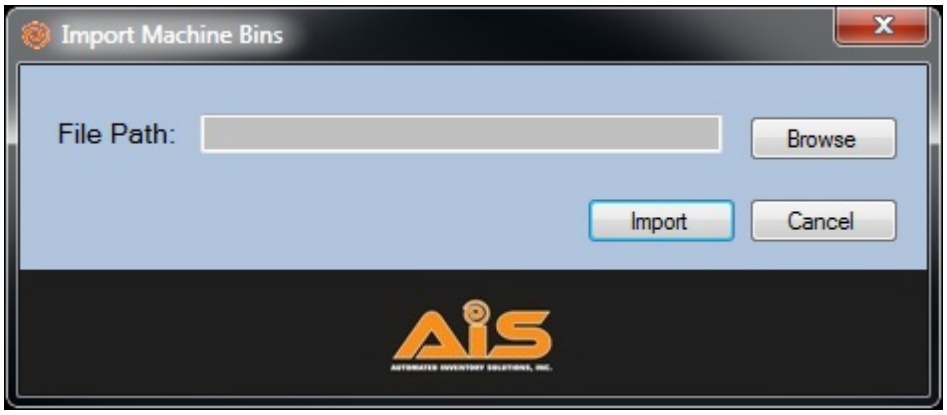


Figure 22. Import Machine Bins Screen

19.3 Import Products

The **Import Products** allows you to import cards to the database. Import Products will only import Excel or CSV file with headers shown in the image below. Red color field is required for the import to work.

	A	B	C	D	E	F
1	PartNum	Description	VendorName	PackageQty	Price	OrderQty
2	FT0001	Squeegee T version		1	$2.30	10
3	FT0002	Squeegee S version		1	$3.30	10
4	FS0090	Squeegee Old		1	$1.50	10
5						

Figure 23. Excel template for Import Products

PartNum: Part Num used in Product Manager.
Description: Description used in Product Manager.
VendorName: Vendor used in Product Manager.
PackageQty: Package Qty used in Product Manager.
Price: Price used in Product Manager.
OrderQty: Order Qty used in Product Manager.

To import products, you will need to click **Browse** to select the Excel or CSV file you want to import, and then click **Import**.

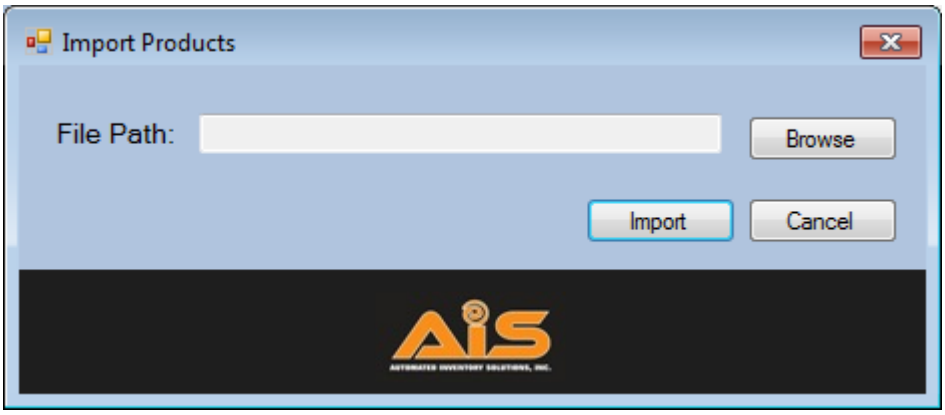


Figure 24. Import Products Screen

19.4 Import Products Vending Limits

The **Import Product Vending Limits** allows you to import product vending rules to the database. Import Product Vending Limits will only import Excel or CSV file with headers shown in the image below. Red color field is required for the import to work.

	A	B	C	D	E	F
1	PartNum	MachineName	User	LimitAmount	LimitPeriod	PeriodType
2	Fs0002	Machine 1	tester, joe	5	1	month
3	fs0003	Machine 1	TESTER, JOE	2	2	days
4						

Figure 25. Excel template for Import Product Vending Limits for Users

PartNum: Part Num used in Product Manager.
MachineName: Name of the machine used in Machine Manager.
User: Name used in Users Manager.
LimitAmount: Item quantity allowed.
LimitPeriod: Number of days, weeks or months.
PeriodType: Type of period. It can be day, week or month. Abbreviations like D, W or M are acceptable.

For example: 5 items per 2 weeks.
LimitAmount is 5, LimitPeriod is 2, PeriodType is week

	A	B	C	D	E	F
1	PartNum	MachineName	Group	LimitAmount	LimitPeriod	PeriodType
2	Fs0002	Machine 1	001	5	1	month
3	fs0003	Machine 1	002	2	2	days
4						

Figure 26. Excel template for Import Product Vending Limits for Groups

PartNum: Part Num used in Product Manager.
MachineName: Name of the machine used in Machine Manager.
Group: Group Name used in Groups Manager.
LimitAmount: Item quantity allowed.
LimitPeriod: Number of days, weeks or months.
PeriodType: Type of period. It can be day, week or month. Abbreviations like D, W or M are acceptable.

For example: 5 items per 2 weeks.
LimitAmount is 5, LimitPeriod is 2, PeriodType is week

To import users, you will need to click **Browse** to select the Excel or CSV file you want to import, and then click **Import**.

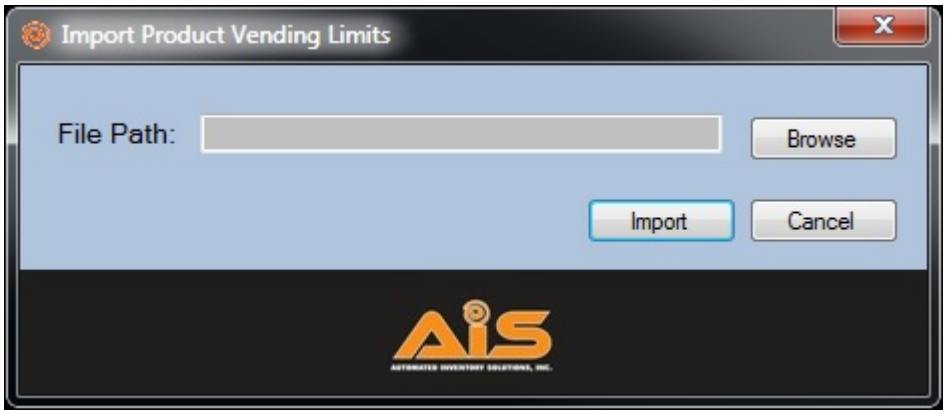


Figure 27. Import Product Vending Limits Screen

19.5 Import Users

The **Import Users** allows you to import cards to the database. Import Users will only import Excel or CSV file with headers shown in the image below. Red color field is required for the import to work.

	A	B	C	D
1	Name	CardNo	Id	DeptName
2	Jon Joan	1563		
3	Mii Mii	6541		
4				

Figure 28. Excel template for Import Users

To import users, you will need to click **Browse** to select the Excel or CSV file you want to import, and then click **Import**.

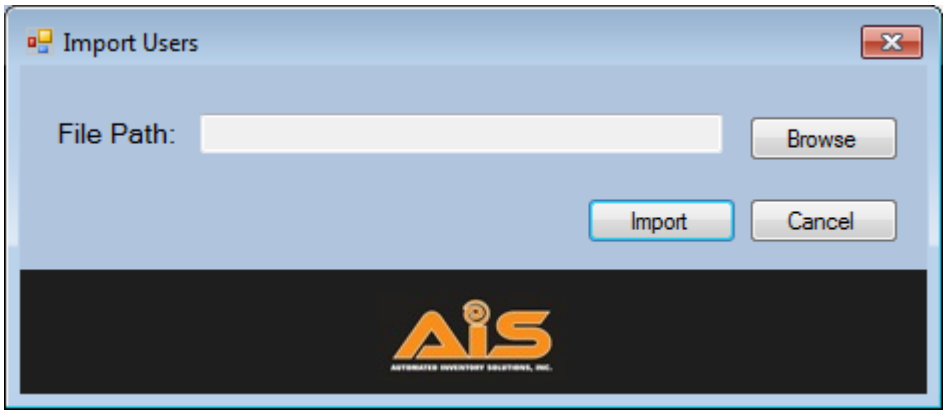


Figure 29. Import Users Screen

19.6 Import Vendors

The **Import Vendors** allows you to import vendors to the database. Import Users will only import Excel or CSV file with headers shown in the image below. Red color field is required for the import to work.

	A	B
1	VendorName	Phone
2	Vendor A	555-555-7777
3	Vendor B	555-555-5555
4		

Figure 30. Excel template for Import Vendors

To import vendors, you will need to click **Browse** to select the Excel or CSV file you want to import, and then click **Import**.

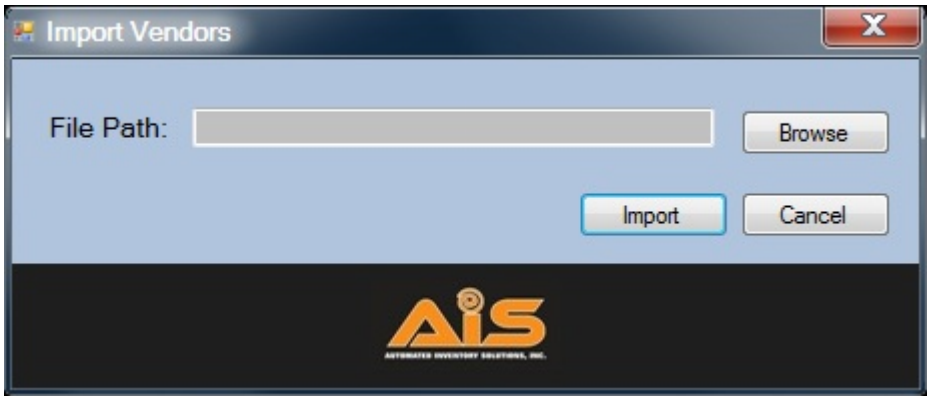


Figure 31. Import Vendors Screen

20 RETURN PRODUCT

Return Product module allows you to return the product that was vended in the last 90 days.

The price of the returned product will be shown as negative value in the report. Return product module does not make any modification to the product amount in the bin.

Only users with Maintenance or Administrator role have access to the return product module.

20.1 Return a product

To return a product, complete the following steps:

1. Click **Modules** and then click **Return Product.**
2. Select the **Machine** that you want to set the Kit.
3. Under **Part Number:** drop down, select a part number.
4. Under **Job Number:** drop down, select a job number.
5. Under **Return Product for:** drop down, select a name.
6. Under **Machine Name:** drop down, select a machine name.
7. Click **Return** button and you will be prompted to confirm if you want to return the product.
9. Click **OK** button and you will be prompted that the product has been returned.
10. Click **OK** button and it is done.

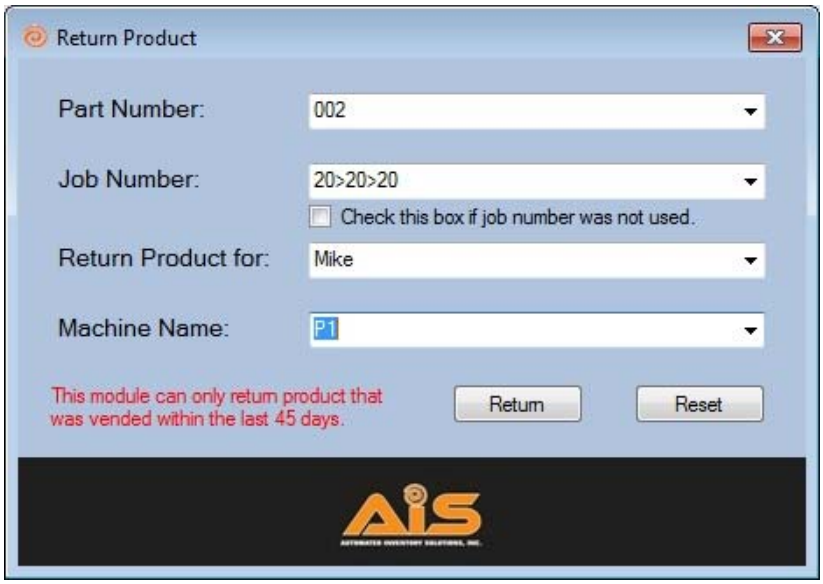


Figure 32: Return Product

21 REPORTS

A key feature of the Keeper Care System is the **Reports** option. Reports can be printed directly from the application or exported into Crystal Reports, Adobe Acrobat, MS Excel, or MS Word. Keeper reports include the following:

1. **Usage By Machine**
2. **Usage By Product**
3. **Usage By Employee**
4. **Usage By Department**
5. **Usage By Job**
6. **Usage By Vendor**
7. **Bin Inventory**
8. **Low Bin Inventory**

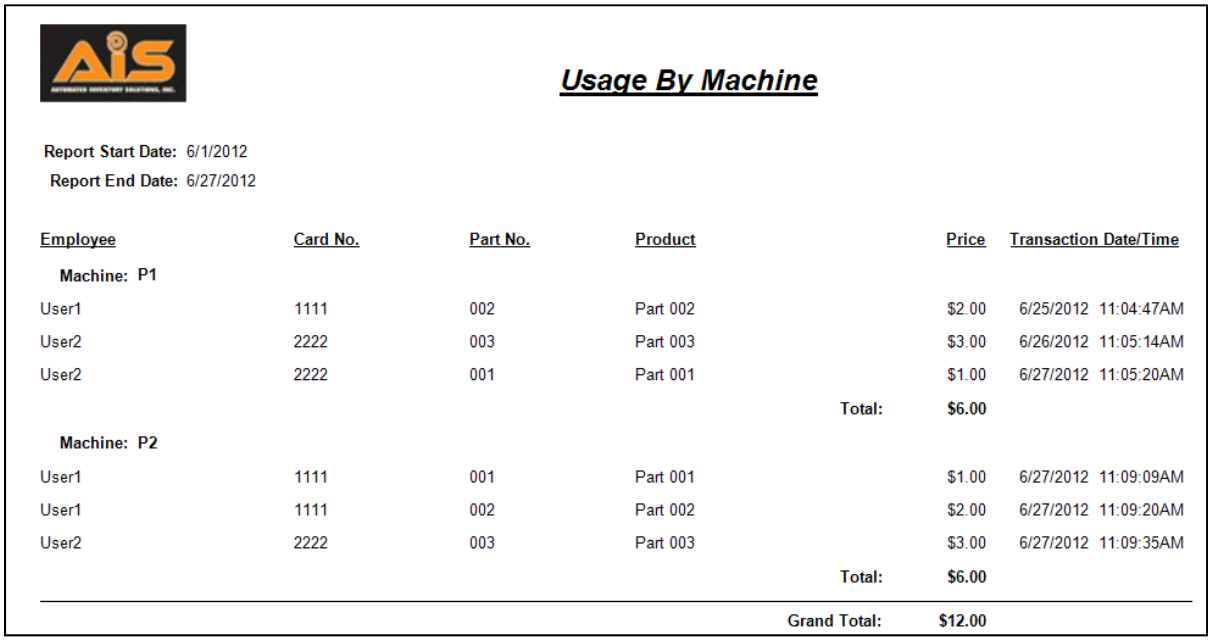
To generate any of the above reports, click **Reports** and enter the month, day and year for the desired date range, and click on any of the report tabs. The report will appear in a new window.

Figure 33. Reports Screen

Have a question? Email: support@aisvendors.com or call (304)725-4801.

21.1 Usage By Machine Report

The **Usage By Machine** report provides you with the: (1) Employee Name, (2) Card #, (3) Part #, (4) Product Description, (5) Price, and (6) Transaction Date/Time by each Keeper Machine within the date range specified. Also, this report will give you the Total Cost of the products vended by machine for the date range specified.



Usage By Machine

Report Start Date: 6/1/2012
Report End Date: 6/27/2012

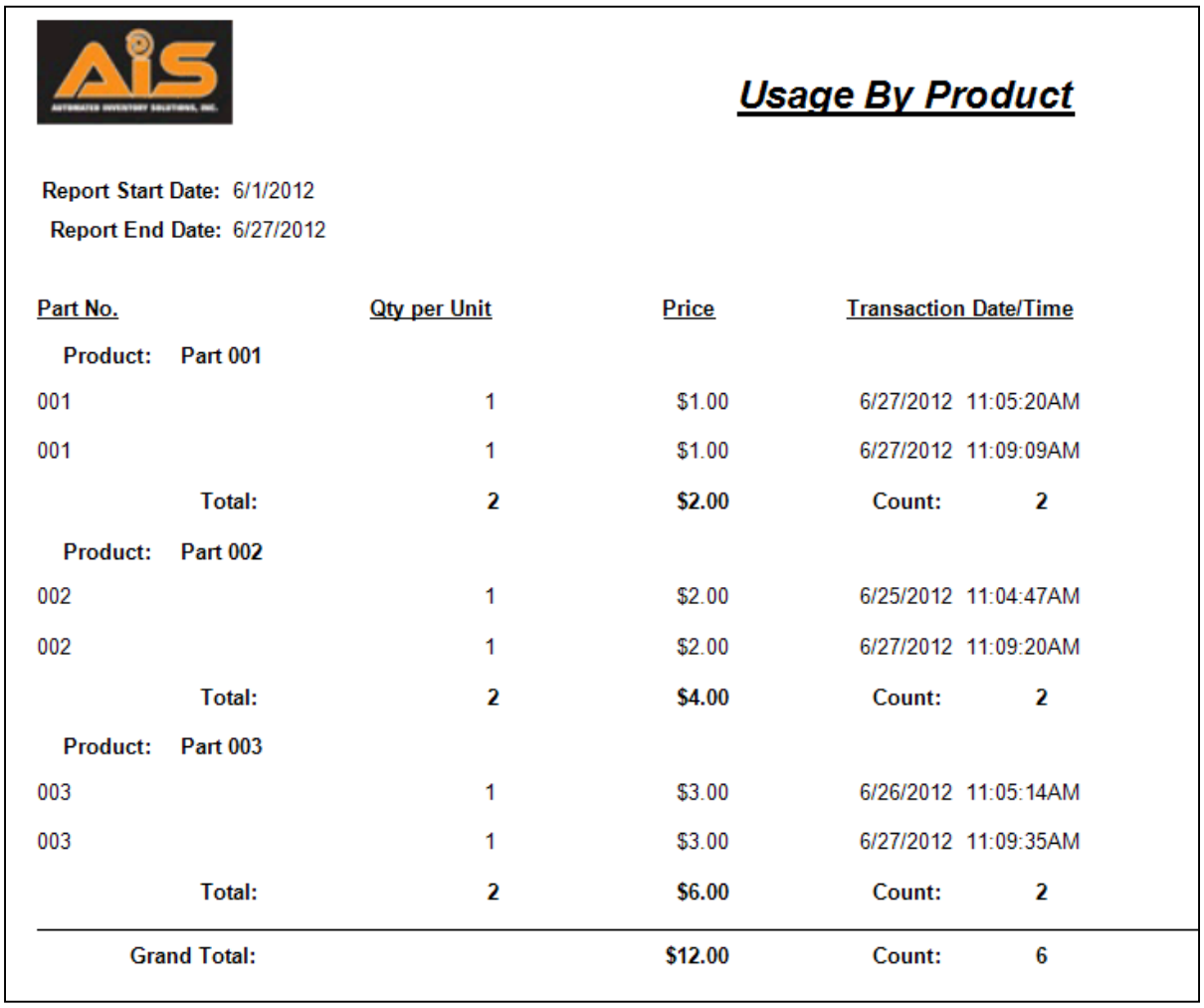
Employee	Card No.	Part No.	Product		Price	Transaction Date/Time
Machine: P1						
User1	1111	002	Part 002		$2.00	6/25/2012 11:04:47AM
User2	2222	003	Part 003		$3.00	6/26/2012 11:05:14AM
User2	2222	001	Part 001		$1.00	6/27/2012 11:05:20AM
				Total:	**$6.00**	
Machine: P2						
User1	1111	001	Part 001		$1.00	6/27/2012 11:09:09AM
User1	1111	002	Part 002		$2.00	6/27/2012 11:09:20AM
User2	2222	003	Part 003		$3.00	6/27/2012 11:09:35AM
				Total:	**$6.00**	
				Grand Total:	**$12.00**	

Figure 34. Usage By Machine Report

> **TIP**: Once the report has been generated, you can use the **Find** feature to locate a particular item by clicking the binoculars at the top of the Report screen . Enter the word or number you are trying to locate and click **Find Next**.

21.2 Usage By Product Report

The **Usage By Product** report provides you with the: (1) Part #, (2) Quantity per unit, (3) Price, and (4) Transaction Date/Time by each Item within the date range specified. Also, this report will give you the Total Cost of each Product vended for the date range specified.



Usage By Product

Report Start Date: 6/1/2012
Report End Date: 6/27/2012

Part No.	Qty per Unit	Price	Transaction Date/Time
Product: Part 001			
001	1	$1.00	6/27/2012 11:05:20AM
001	1	$1.00	6/27/2012 11:09:09AM
Total:	**2**	**$2.00**	**Count: 2**
Product: Part 002			
002	1	$2.00	6/25/2012 11:04:47AM
002	1	$2.00	6/27/2012 11:09:20AM
Total:	**2**	**$4.00**	**Count: 2**
Product: Part 003			
003	1	$3.00	6/26/2012 11:05:14AM
003	1	$3.00	6/27/2012 11:09:35AM
Total:	**2**	**$6.00**	**Count: 2**
Grand Total:		**$12.00**	**Count: 6**

Figure 35. Usage By Product Report

21.3 Usage By Employee Report

The **Usage By Employee** report provides you with the: (1) Part #, (2) Product, (3) Price, and (4) Transaction Date/Time that each Employee has purchased within the date range specified. Also, this report will give you the total amount spent for each Employee as well as the total costs for all employees for the date range specified.

You can search for a specific employee by using the Find feature or by selecting a persons name on the left hand side of the screen.

Please note that transactions by card ID that is not associated to a user will not be shown in this report.

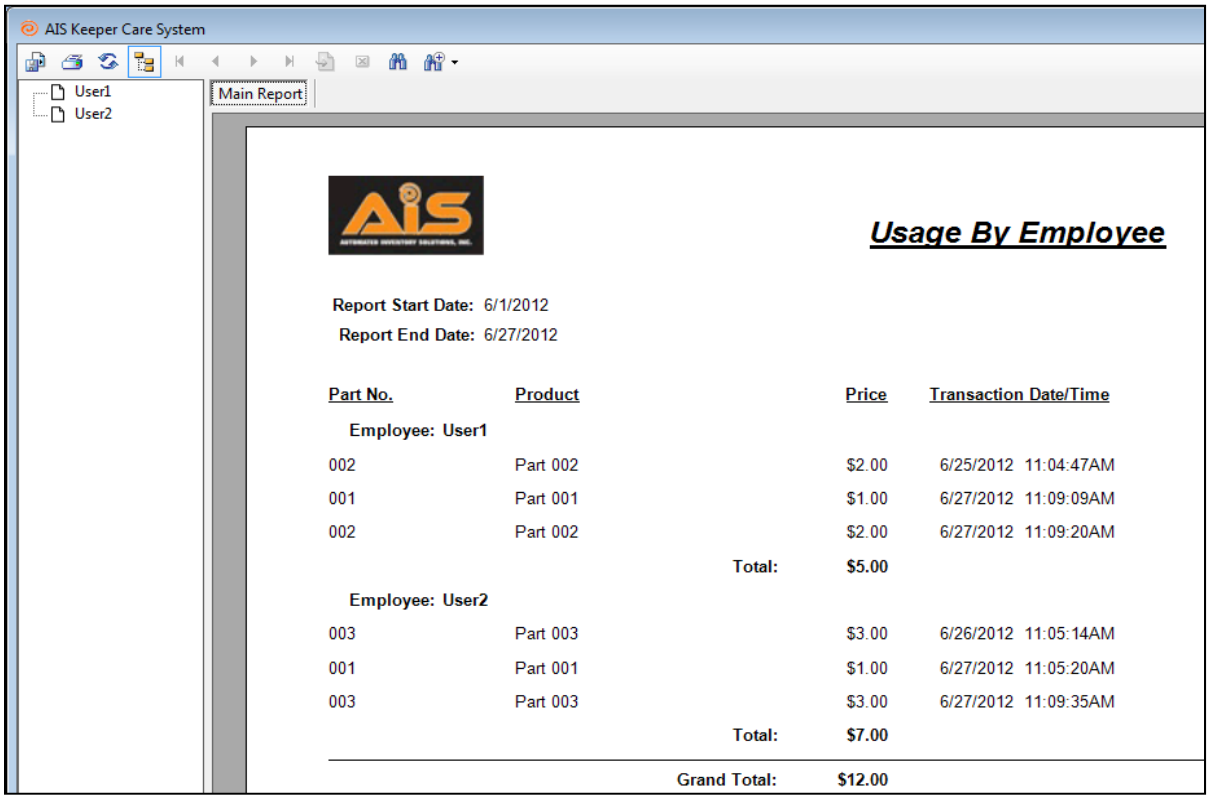


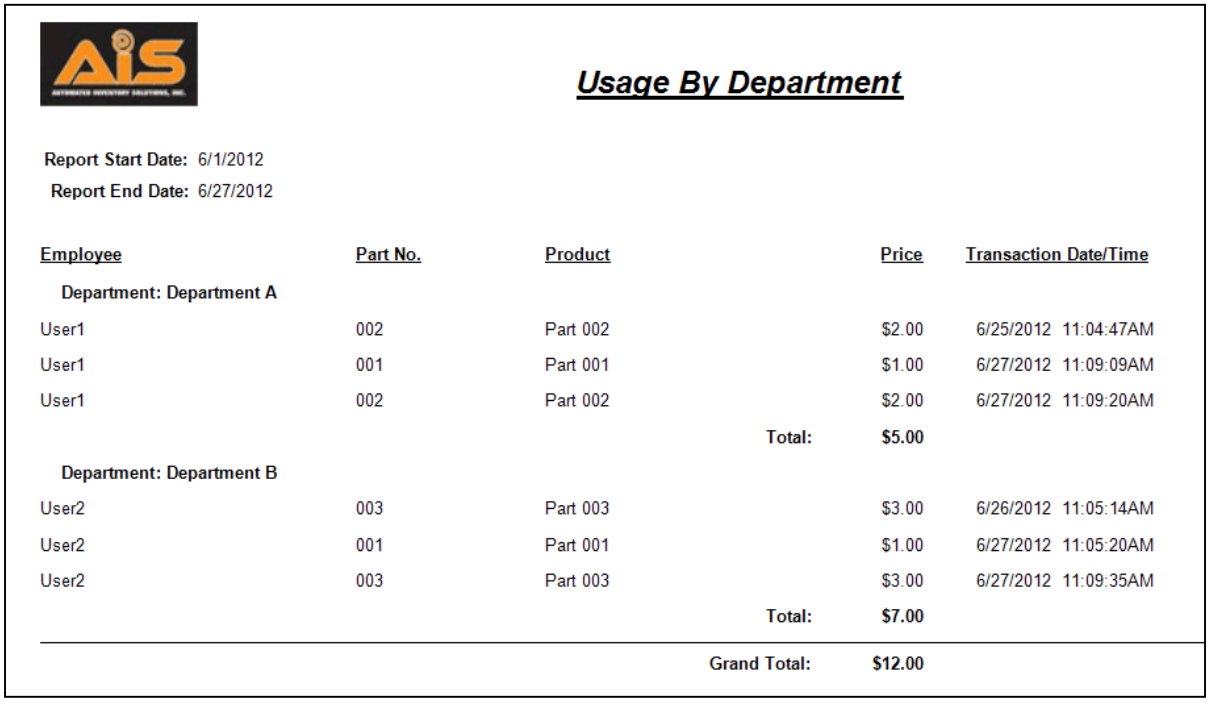
Figure 36. Usage By Employee Report

21.4 Usage By Department Report

The **Usage By Department** report provides you with the: (1) Employee, (2) Part#, (3) Product, (4) Price, and (5) Transaction Date/Time for each department within the date range specified. Also, this report will give you the total amount spent for each department as well as the total costs for all departments for the date range specified.

Finally, within the report, you can search for a specific department by using the Find feature or by selecting a department on the left hand side of the screen.

Please note that transactions by employees that are not associated to a department will not be shown in this report.



Usage By Department

Report Start Date: 6/1/2012
Report End Date: 6/27/2012

Employee	Part No.	Product		Price	Transaction Date/Time
Department: Department A					
User1	002	Part 002		$2.00	6/25/2012 11:04:47AM
User1	001	Part 001		$1.00	6/27/2012 11:09:09AM
User1	002	Part 002		$2.00	6/27/2012 11:09:20AM
			Total:	**$5.00**	
Department: Department B					
User2	003	Part 003		$3.00	6/26/2012 11:05:14AM
User2	001	Part 001		$1.00	6/27/2012 11:05:20AM
User2	003	Part 003		$3.00	6/27/2012 11:09:35AM
			Total:	**$7.00**	
			Grand Total:	**$12.00**	

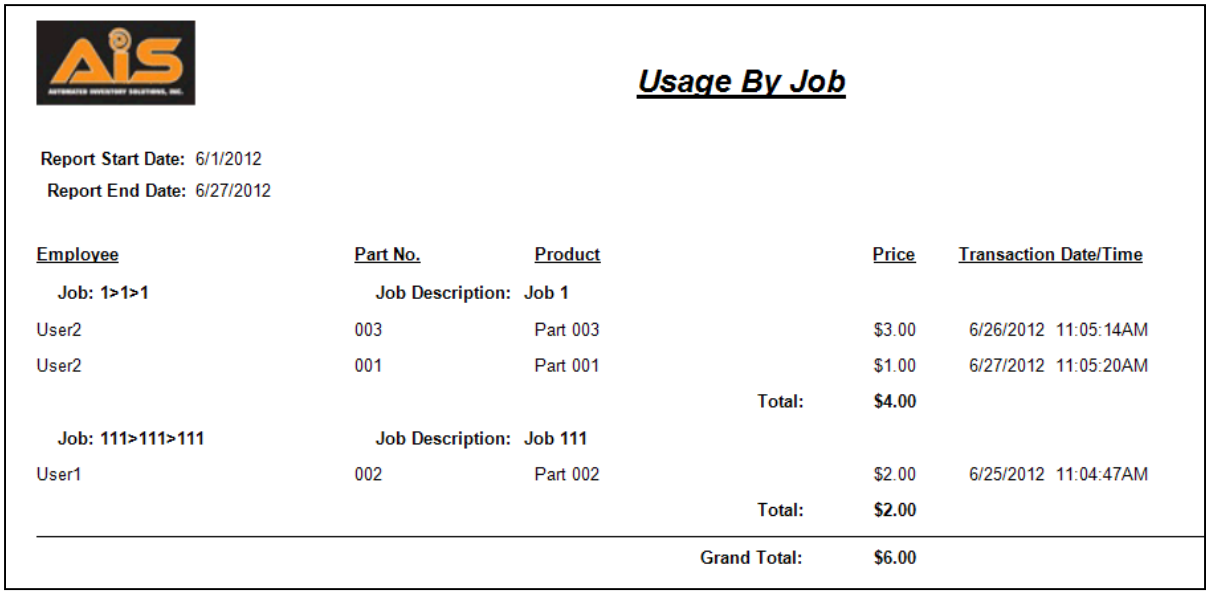
Figure 37. Usage By Department Report

Have a question? Email: support@aisvendors.com or call (304)725-4801.

21.5 Usage by Job Report

The **Usage by Job** report provides you with the: (1) Employee, (2) Part #, (3) Product, (4) Price, and (5) Transaction Date/Time for all transactions assigned to a particular job.

Please note that transactions that didn't have a job number will not be shown on this report.



Usage By Job

Report Start Date: 6/1/2012
Report End Date: 6/27/2012

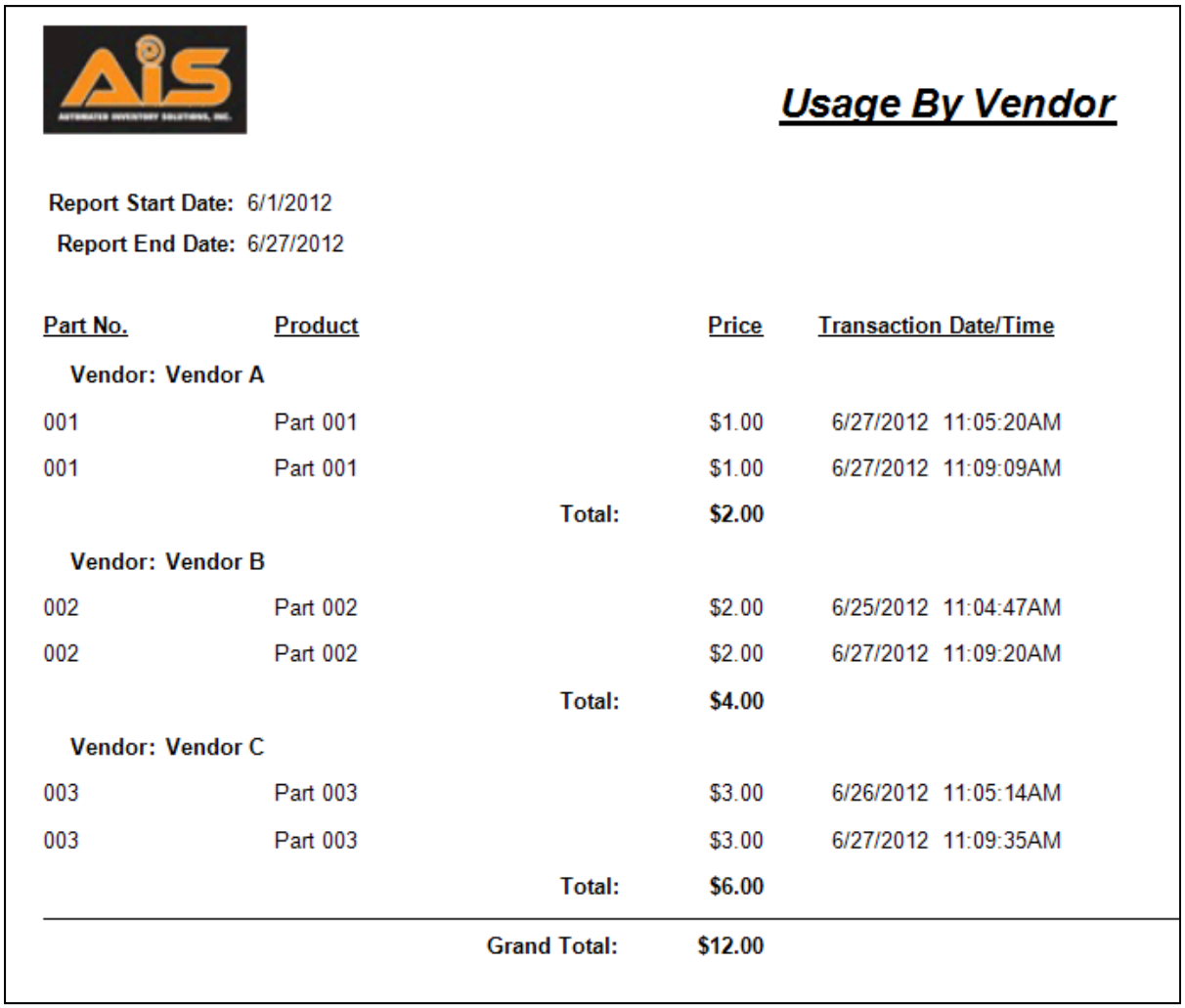
Employee	Part No.	Product		Price	Transaction Date/Time
Job: 1>1>1	**Job Description:**	**Job 1**			
User2	003	Part 003		$3.00	6/26/2012 11:05:14AM
User2	001	Part 001		$1.00	6/27/2012 11:05:20AM
			Total:	**$4.00**	
Job: 111>111>111	**Job Description:**	**Job 111**			
User1	002	Part 002		$2.00	6/25/2012 11:04:47AM
			Total:	**$2.00**	
			Grand Total:	**$6.00**	

Figure 38. Usage by Job Report

21.6 Usage by Vendor Report

For each vendor, this report provides you with the: (1) Part #, (2) Product #, (3) Price, and (4) Transaction Date/Time within a specified date range. Additionally, this report lists a subtotal for all transactions for each individual vendor with a grand total of all transactions within the specified date range at the end of the report.

Please note that transactions of products that are not associated to a vendor will not be shown in this report.



Usage By Vendor

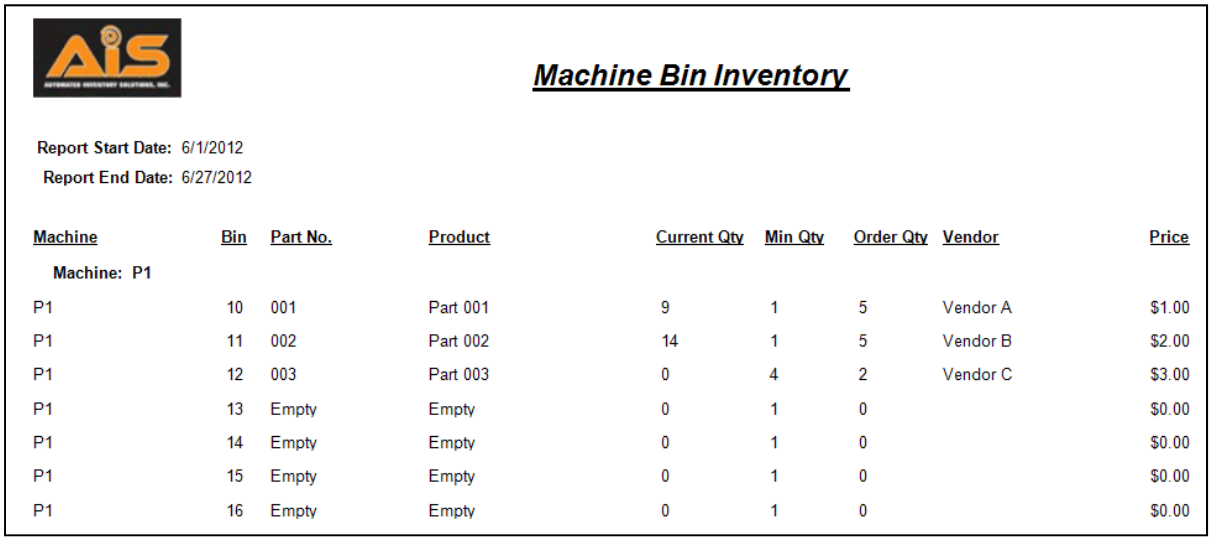
Report Start Date: 6/1/2012
Report End Date: 6/27/2012

Part No.	Product		Price	Transaction Date/Time
Vendor: Vendor A				
001	Part 001		$1.00	6/27/2012 11:05:20AM
001	Part 001		$1.00	6/27/2012 11:09:09AM
		Total:	**$2.00**	
Vendor: Vendor B				
002	Part 002		$2.00	6/25/2012 11:04:47AM
002	Part 002		$2.00	6/27/2012 11:09:20AM
		Total:	**$4.00**	
Vendor: Vendor C				
003	Part 003		$3.00	6/26/2012 11:05:14AM
003	Part 003		$3.00	6/27/2012 11:09:35AM
		Total:	**$6.00**	
		Grand Total:	**$12.00**	

Figure 39. Usage by Vendor Report

21.7 Bin Inventory Report

The **Bin Inventory** report provides you with the: (1) Machine Name, (2) Bin #, (3) Part #, (4) Product Description, (5) Current Quantity, (6) Vendor Name, (7) Vendor Phone, (8) Price, and (9) Order Quantity for all of the bin inventory in all of the Keeper Machines within a specified date range.



Machine Bin Inventory

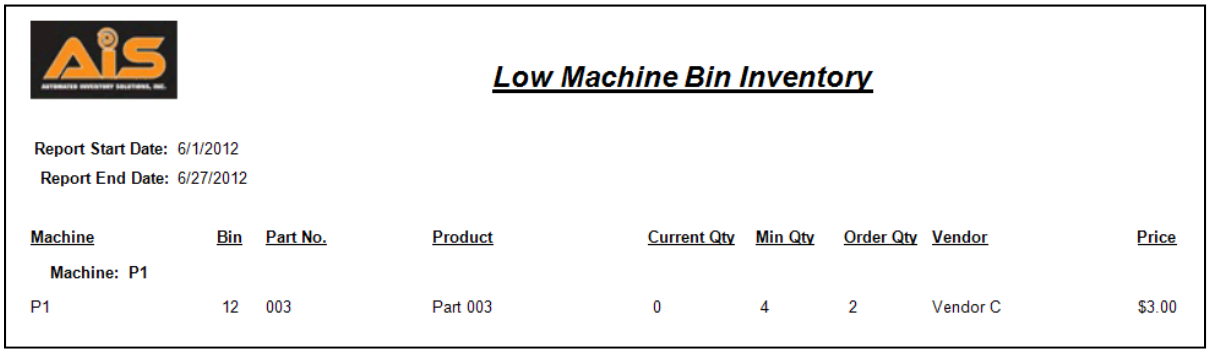
Report Start Date: 6/1/2012
Report End Date: 6/27/2012

Machine	Bin	Part No.	Product	Current Qty	Min Qty	Order Qty	Vendor	Price
Machine: P1								
P1	10	001	Part 001	9	1	5	Vendor A	$1.00
P1	11	002	Part 002	14	1	5	Vendor B	$2.00
P1	12	003	Part 003	0	4	2	Vendor C	$3.00
P1	13	Empty	Empty	0	1	0		$0.00
P1	14	Empty	Empty	0	1	0		$0.00
P1	15	Empty	Empty	0	1	0		$0.00
P1	16	Empty	Empty	0	1	0		$0.00

Figure 40. Machine Bin Inventory Report

21.8 Low Machine Bin Inventory Report

The **Low Machine Bin Inventory** report provides you with a list of low machine bin inventory with the following fields: (1) Machine name/number, (2) Bin #, (3) Part #, (4) Product #, (5) Current Quantity, (6) Minimum Quantity, (7) Order Quantity, (8) Vendor, and the (9) Price of the product.



Low Machine Bin Inventory

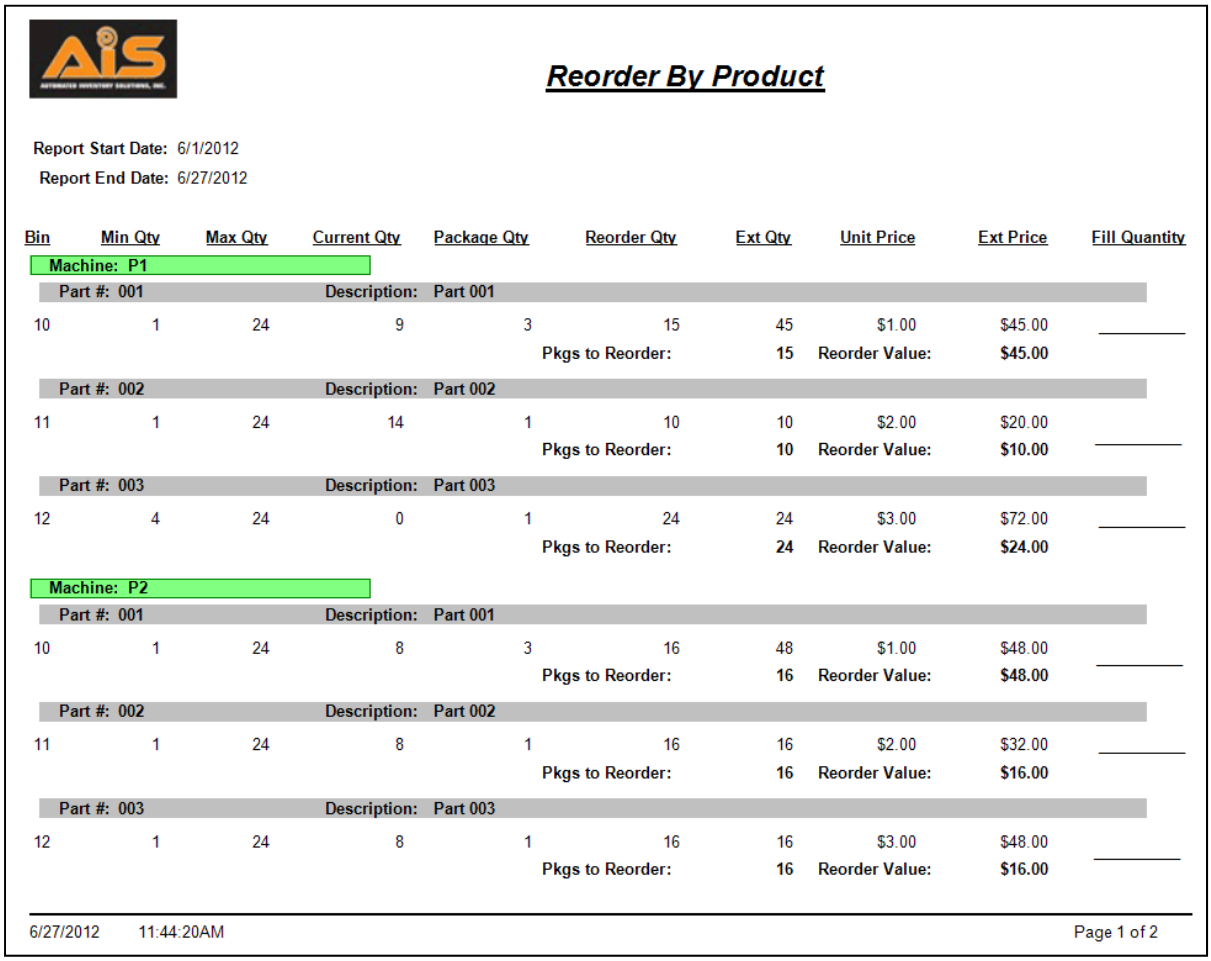
Report Start Date: 6/1/2012
Report End Date: 6/27/2012

Machine	Bin	Part No.	Product	Current Qty	Min Qty	Order Qty	Vendor	Price
Machine: P1								
P1	12	003	Part 003	0	4	2	Vendor C	$3.00

Figure 41. Low Machine Bin Inventory

21.9 Reorder By Product Report

The **Reorder By Product** report provides you with a list of products on each machines with the following fields: (1) Bin #, (2) Minimum Quantity, (3) Maximum Quantity, (4) Current Quantity, (5) Package Quantity, (6) Reorder Quantity, (7) Extended Quantity, (8) Unit Price, (9) Extended Price, and (10) Fill Quantity.



Reorder By Product

Report Start Date: 6/1/2012
Report End Date: 6/27/2012

Bin	Min Qty	Max Qty	Current Qty	Package Qty	Reorder Qty	Ext Qty	Unit Price	Ext Price	Fill Quantity
Machine: P1									
Part #: 001			**Description:**	**Part 001**					
10	1	24	9	3	15	45	$1.00	$45.00	_____
					Pkgs to Reorder:	**15**	**Reorder Value:**	**$45.00**	
Part #: 002			**Description:**	**Part 002**					
11	1	24	14	1	10	10	$2.00	$20.00	_____
					Pkgs to Reorder:	**10**	**Reorder Value:**	**$10.00**	
Part #: 003			**Description:**	**Part 003**					
12	4	24	0	1	24	24	$3.00	$72.00	_____
					Pkgs to Reorder:	**24**	**Reorder Value:**	**$24.00**	
Machine: P2									
Part #: 001			**Description:**	**Part 001**					
10	1	24	8	3	16	48	$1.00	$48.00	_____
					Pkgs to Reorder:	**16**	**Reorder Value:**	**$48.00**	
Part #: 002			**Description:**	**Part 002**					
11	1	24	8	1	16	16	$2.00	$32.00	_____
					Pkgs to Reorder:	**16**	**Reorder Value:**	**$16.00**	
Part #: 003			**Description:**	**Part 003**					
12	1	24	8	1	16	16	$3.00	$48.00	_____
					Pkgs to Reorder:	**16**	**Reorder Value:**	**$16.00**	

6/27/2012 11:44:20AM Page 1 of 2

Figure 42. Reorder by Product Report

21.10 Usage By Machine - Extended Report

The **Usage By Machine - Extended** report provides you with the following fields: (1) Employee Name, (2) Bin #, (3) Part #, (4) Product Description, (5) Vendor, (6) Pkg Qty, (7) Ext Price and (8) Transaction Date/Time by each Keeper Machine within the date range specified.

Usage By Machine - Extended

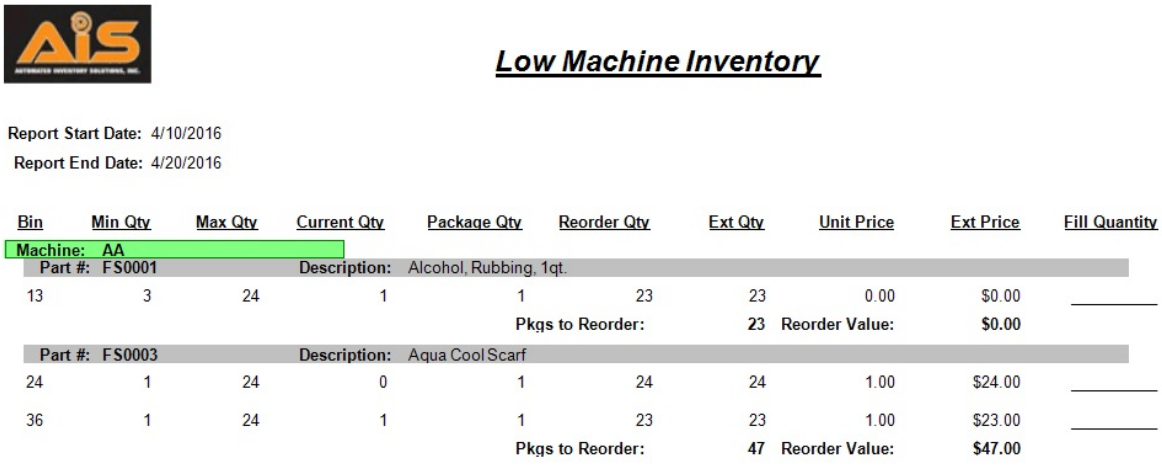
Report Start Date: 4/10/2016
Report End Date: 4/20/2016

Employee	Bin	Part No.	Product	Vendor	Pkg Qty	Ext Price	Transaction Date/Time
Machine: Machine 1							
Barbour, Larry	11	24905A41	Knife, Utility, Breakaway Blade	McMaster-Carr	1	$7.78	4/13/2016 3:04:54PM
Barbour, Larry	11	24905A41	Knife, Utility, Breakaway Blade	McMaster-Carr	1	$7.78	4/13/2016 3:05:34PM
Barbour, Larry	11	24905A41	Knife, Utility, Breakaway Blade	McMaster-Carr	1	$7.78	4/13/2016 3:05:37PM
Barbour, Larry	11	24905A41	Knife, Utility, Breakaway Blade	McMaster-Carr	1	$7.78	4/13/2016 3:05:39PM
Barbour, Larry	11	24905A41	Knife, Utility, Breakaway Blade	McMaster-Carr	1	$7.78	4/13/2016 3:05:42PM
Barbour, Larry	11	24905A41	Knife, Utility, Breakaway Blade	McMaster-Carr	1	$7.78	4/13/2016 3:05:44PM
Barbour, Larry	11	24905A41	Knife, Utility, Breakaway Blade	McMaster-Carr	1	$7.78	4/13/2016 3:05:47PM
Barbour, Larry	11	24905A41	Knife, Utility, Breakaway Blade	McMaster-Carr	1	$7.78	4/13/2016 3:05:54PM
Barbour, Larry	11	24905A41	Knife, Utility, Breakaway Blade	McMaster-Carr	1	$7.78	4/13/2016 3:05:57PM
Barbour, Larry	11	24905A41	Knife, Utility, Breakaway Blade	McMaster-Carr	1	$7.78	4/13/2016 3:05:59PM
Barbour, Larry	11	24905A41	Knife, Utility, Breakaway Blade	McMaster-Carr	1	$7.78	4/13/2016 3:06:01PM

Figure 43. Usage By Machine - Extended Report

21.11 Low Machine Inventory Report

The **Low Machine Inventory** report provides you with a list of products on each machines with the following fields: (1) Bin #, (2) Minimum Quantity, (3) Maximum Quantity, (4) Current Quantity, (5) Package Quantity, (6) Reorder Quantity, (7) Extended Quantity, (8) Unit Price, (9) Extended Price, and (10) Fill Quantity.



Low Machine Inventory

Report Start Date: 4/10/2016
Report End Date: 4/20/2016

Bin	Min Qty	Max Qty	Current Qty	Package Qty	Reorder Qty	Ext Qty	Unit Price	Ext Price	Fill Quantity
Machine: AA									
Part #: FS0001			**Description:**	Alcohol, Rubbing, 1qt.					
13	3	24	1	1	23	23	0.00	$0.00	_____
				Pkgs to Reorder:		**23**	**Reorder Value:**	**$0.00**	
Part #: FS0003			**Description:**	Aqua Cool Scarf					
24	1	24	0	1	24	24	1.00	$24.00	_____
36	1	24	1	1	23	23	1.00	$23.00	_____
				Pkgs to Reorder:		**47**	**Reorder Value:**	**$47.00**	

Figure 44. Low Machine Inventory Report

21.12 Auto Enable & Frequency of Reports

For each report, you can select whether you want this report to be automatically generated as well as preset how often you want the report to be generated using the **Auto Enable** and **Frequency** columns. The **Next Run** column is automatically updated based on the information entered in the **Frequency** column.

If you want to run the report every **Monday** at **8:30am**, just change the **Next Run** to the upcoming **Monday** and specify the time. See the **Next Run** column in the **Reorder By Product** row in the figure below.

Figure 45. Report Menu in the Keeper Care System

21.13 Report Email Manager

You will use the **Report Email Manager** screen to set up the email addresses to which you want the reports to be emailed to.

Add Email Addresses

1. To add a new email address to the Keeper system, click on a blank row under **Available Email Addresses** and double-click on a blank cell.
2. Enter the email address.

Assign Report to an Email Address

1. To assign a report to a particular email address, select the Report from the drop-down menu.
2. Select the email address.
3. Click the arrow button. >>
4. The email address will appear in the **Report Email Addresses** column and will be configured to receive this report.
5. Check the attachment type (Excel or CSV) if you want to receive the report in Excel or CSV format.
6. Click to exit the Report Email Manager screen and to return to the Reports Screen.

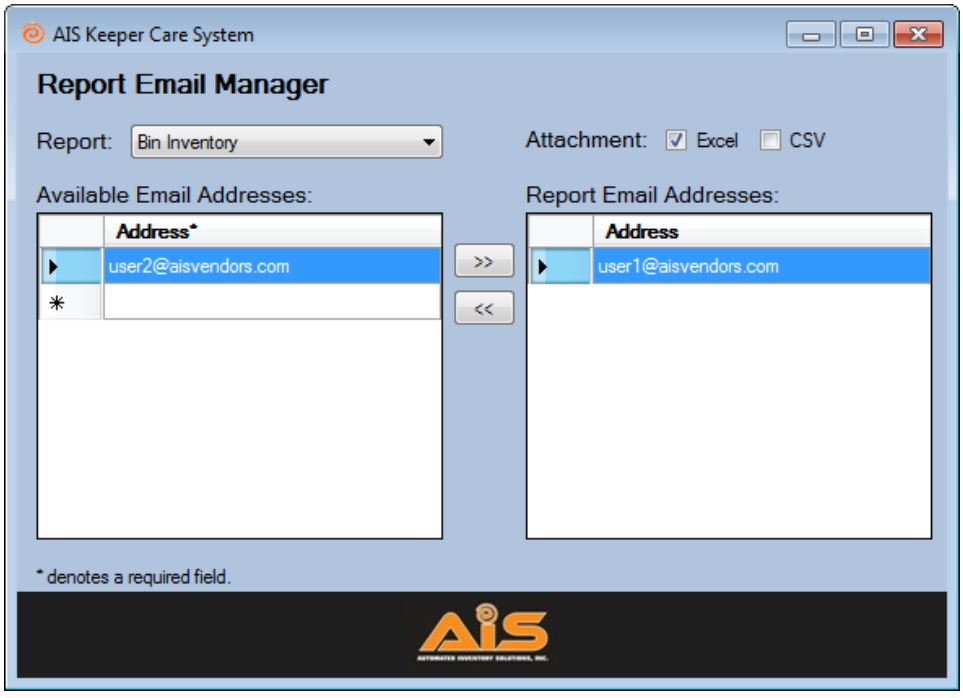


Figure 46. Report Email Manager

21.14 Print a Report

To print the report directly from the Keeper Care System, click on the Print option at the top of the screen.

21.15 Export a Report

To export the report into a different software application, complete the following steps:

1. Click on the Export option at the top of the generated report screen. Specify the type of
   file and the location for saving the file. There are several file types to choose from including: (1) Crystal Reports (.rpt), Adobe Acrobat (.pdf), Microsoft Excel (.xls), Microsoft Excel Data File Only (.xls), Microsoft Word (.doc), or Rich Text Format (.rtf).
2. Select the save location, name the file, and choose the file type.
3. Click **Save**.
4. An **Export Completed** dialog box will appear to confirm that your export is complete.

22 TECHNICAL SUPPORT

For technical questions, email support@aisvendors.com or call (304)725-4801.