Getting started with your iUNFI Standard Device

(iPod Touch with Bluetooth Scanner)
# Getting Started with your iUNFI Device

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PARTS AND PIECES

What’s included: iPod touch and Bluetooth scanner, Micro-USB charging cable, Apple USB Sync cable, lanyard, Set-Up Instructions and Troubleshooting Tools Page. If you’re missing any of these, please contact iunfi@unfi.com.

IMPORTANT

Before using your device, be sure that both the iPod and the scanner are charged. When both devices are charged, you can expect 5 hours of heavy use before needing to recharge.

The first time you power on your device, you may be asked for a 4 digit passcode; please input

1 – 0 – 1 – 0

to unlock the iUNFI device.
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CONNECTING TO THE INTERNET (Wi-Fi)

Being connected to the internet is necessary for using iUNFI; in order for you to do any of the below tasks, you have to have internet connection on your device:

- Logging in (for the first time)
- Getting catalog information (refreshing, updating, etc.)
- Submitting an order
- Receiving pricing updates

In order to be connected to the internet, you need to go to **Settings > Wi-Fi** and connect to a wireless network (1); these are generally password protected (padlock icon) for good reason so you must know the password to be able to connect.

Check the strength and availability of your Wi-Fi by opening up an app that uses internet; e.g. **Safari** and type in google.com, facebook.com, etc. the **Weather app** (2) and allow for it to update the forecast, etc. If you are experiencing a long lag, the website or forecast won’t update, please check your Wi-Fi connection or your IT department.

For additional questions, please contact iUNFI@unfi.com
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THE APP STORE

In order to use the App Store, make sure that you have an Apple ID username and password.

Tap on the Home button to return to the iPod’s home screen from any activities and locate the App Store application in gradient blue (1). Tap on it to open Apple’s App Store.

There are five selections on the bottom of the App Store screen. Locate these; then select the search option (2) (the magnifying glass) along the bottom.

In the search bar (3) that appears at the top type in iUNFI (4) then initiate the search by pressing the blue Search button (5) in the bottom right hand corner. Next to the iUNFI icon, locate the button that prompts you to install iUNFI.

Note: because it’s installed already, it will say OPEN instead of INSTALL, GET, etc.) (6).
GETTING STARTED WITH YOUR iUNFI DEVICE

CONNECTING YOUR BLUETOOTH SCANNER

To use your Bluetooth Scanner with your iOS device, you will need to be connected via Bluetooth.

1. Turn on your Bluetooth Scanner by holding down the power button until it beeps, located on the side of the scanner.

2. Scan the “iOS Mode” barcode (below) with your Bluetooth scanner so allow communication between your iOS device and your scanner.

3. Open the “Settings” application.
Getting Started with your iUNFI Device

4. Tap on “Bluetooth”

5. Switch the toggle to the “ON” position (the icon will change to green) and tap on the device listed as “Socket CHS[……]” to connect your iOS device to your Bluetooth scanner.

6. When successful, the device will be listed as “Connected” in the “My Devices” section.

7. Return to your iOS device’s home screen and tap on iUNFI to open. Log In and begin using iUNFI with your newly paired Bluetooth scanner.
Getting Started with your iUNFI Device

LOGGING IN TO iUNFI

Depending on your Home Screen’s set up, you may need to scroll over a page to find the app.

Need Help? We can connect you to www.iunfi.com’s Logging In KB article to assist you.

Start the iUNFI Application by pressing the iUNFI icon on the home screen (1).

Log in using your UNFI Username and Password (2).

Optional: Set a 4 digit personal PIN for easier access instead of logging in with full UN and PW every time (3).

For additional questions, please contact iUNFI@unfi.com
THE HOME SCREEN

1. **CREATE ORDER:** This will be the area you will be spending a lot of time in as it’s where you will be ordering your products, etc.

2. **OPEN SAVED ORDERS:** This will allow you to access pending and historical orders as well your custom made templates.

3. **CREATE RETURN:** This is for UNFI sales only.

4. **CREATE TAG REQUEST** and **CREATE SRP UPDATE:** These are available depending on region. Please contact iunfi@unfi.com for any inquires.

5. **SETSCAN:** if you’re an independent, you can reset your SetScan tutorial so you can go over the tutorial if you forget how to use SetScan.

6. **HELP:** pulls up iunfi.com’s support center for you in a mobile friendly format.

7. **FEEDBACK:** allows you to provide us with important feedback from you about our app.

8. **SETTINGS:** will allow you to set various order alerts, pin code settings and see what app version of iUNFI you’re on.
ORDERING ITEMS

After you tap on Create Order from the home screen, you will visit this page (1). In the top text field that says, **Account: ### WH: [Location]** (2), if the customer account number is not what you want to order with, tap on the text field and a list of available customer account number associated with your username will appear (3).

You may see customer account numbers associated with your departments, Select Nutrition, Albert’s, or other stores in your chain, depending on how your username was setup. Different types of accounts will be colored accordingly:

- UNFI and Select Nutrition - white (4)
- Albert’s Organics - green (5)

Once you have found the correct account number, tap on the corresponding circle (6) and it will return to the Create Order page. Name your order (optional) (7) and tap on Create (8).
Getting Started with your iUNFI Device

ORDERING ITEMS

Your order will begin in list view (1) and it will start updating/downloading the catalog (2). This could take as long as five minutes depending on its size and the strength of your internet connection. If you’re connected to wi-fi, the catalog will automatically update every 12 hrs. The page will be blank until you start adding products to the order.

Note: the orange banner at the top will tell you the status of the catalog. Once the download is done, the banner will disappear.

SCANNING ITEMS

SCAN: Scan a product number or UPC from a shelf tag or product box/bag (3). Press the Scan button on the upper right hand side of the device.

CAMERA SCAN: Press the camera icon (4) (if you do not have an integrated scanner connected). Place a product number or UPC from a shelf tag or product box/bag in the viewer. The scan will automatically populate. Continue to scan until order is completed.

FIND CODE #: Click the find code # icon (5). This is used to manually enter a product code or UPC. If there is more than one item associated, you will be asked to select, by pressing on the item.
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**BROWSE FUNCTION**

**Basic Browse Function:** Browse is set up by Department (1), Type (for Albert’s Organic customer numbers) (2) or Brand. Scroll through, or tap the letter on the right side corresponding to the Brand name (3).

**List and Image View:** When using the Browse function, the option to view products in a text List View or in a product Image View is now available. Tap on each button (4) to shift between the two views.

**Search Via Browse:** You may also press the magnifying glass icon to Search . You can search by keywords (5):
- **Name:** Product name - ex. Dog food
- **Brand:** Name of manufacturers ex. Amy’s
- **UPC:** Product number
- **UNFI:** UNFI product item number
- **PLU:** Listed for Albert’s accounts (6)

**Sorting:** An easy way to sort items within a Category is to tap the arrows (top left) to bring up the filter (7). Tap the filter you want, then tap Re-sort results (8).

For additional questions, please contact iUNFI@unifi.com
PRODUCT FILTERS

In the initial Browse function, there is now a Show Filters function (1). Once tapped on, the options will be available for you to tap and check mark, then tap Apply (2). Each filter will then only show the products with that filter applied.

New Products: Upon clicking and applying the New Products filter (3), items added in the previous 60 days to your catalog will update and show only those items. Note the substantial difference in numbers of products in the two images above, by department.

In image/single view, you will see that new products are denoted by blue ribbons (new).

Monthly Specials: Just like how you use the New Products filter, you can apply the Monthly Specials (4) filter, items carrying a monthly promotional discount to your catalog will update and show only those items.

For Monthly Specials, in image/single view, you will see green ribbons (5) to denote discounted items (new). This is a manufacturer’s promotion and is in addition to your own discounts.
Getting Started with your iUNFI Device

DISCONTINUED REASON CODES

Red banners (1) with discontinued codes will assist you in making better, in-aisle purchasing decisions. Due to the fluidity of these codes being implemented within UNFI business systems, there are no guarantees you will or will not receive the product if ordered. Please “Reload” your catalog to receive the most up to date information.

Discontinued Reasons:

Pack Cng Soon  A pack change has been implemented
Future Pack Change  A pack change will be implemented
Future UNFI Disco  UNFI will no longer be carrying the item
Future Vend Disco  Manufacturer no longer producing the item
Not Carried  Physically not stocked in a specific warehouse
SN Only  Select Nutrition item. SN acct needed to order
MFG OOS  Manufacturer/Manufacturing Out of Stock
LT OOS  Long Term out of Stock
Out of Stock  Usually seasonal and holiday items
Inactive  Not available in catalog (usually APL)
DELETING ITEMS

**List View:** In the List View of the Order page (1), swipe finger from right to left over the QTY of the item you wish to delete. A Delete button will appear (2) – Tap to delete item.

**Single View:** Tap the blue Delete Item button (3). A confirmation box will appear – press Delete (4).

For additional questions, please contact iUNFI@unfi.com
CURRENT & PENDING ORDERS

Orders are automatically saved after adding an item (1). You may toggle between orders in the same or different accounts.

The Pending tab (2) is another way for you to navigate to the Open Saved Orders page (3), where you will the Pending, History and Template Orders.

OPEN SAVED ORDERS

Pending Orders (4):
- Switch between Accounts
- Send Multiple Orders Simultaneously
- Review Date and Time orders were created

Order History (5):
- Lists previously sent orders up to 30 days
- Quick view of previous orders & confirmation numbers
- Cross Device Transactional Sync with all account numbers under web login

Order Template (6):
- Allows for regular items/orders to be easily accessed
- Saves Time for regular orders
- Can be created from Order Actions Box (next slide)
ORDER ACTION BOX

When you tap on the order action box (arrow/box, located on top right), multiple options will pop up to help you order efficiently.

Send Order: to transmit and submit an order immediately. Must be connected to WiFi. Order Info Confirmation Screen will appear upon transmission (1).

Update Catalog: This will simply update any difference in items or item details. Must be connected to Wi Fi. For UNFI accounts, these updates will occur every 12 hours. For Albert’s, updates will be checked for every 1/2 hour. If changes were made since the last check, you will be given the option to update your catalog (2). Once Update is tapped, you will see yellow bar across screen letting you know that it’s updating (3).

Save As Template: This saves current order as a template for future ordering; this is useful if you order the same items regularly (4).
**Getting Started with your iUNFI Device**

**Customer-Specific Pricing For Broadline Accounts**

**How Price Works:**

- When price is ORANGE, it ALWAYS indicates the customer’s actual cost of an item
- When price is BLACK, it ALWAYS indicates wholesale cost
- To update price, you must be connected to a Wi-Fi network or have cellular data service on your device.
- When price updates, iUNFI will store and continue to display that price for that item for the next three days

*(Please note, pricing displayed for Albert’s accounts is always customer-specific cost regardless of color)*

**How To Use It:**

**Browse:** Access the “Browse” function when connected to Wi-Fi or cell data and open the details screen for any item to update the price. When white, the price listed is wholesale. When the price changes to orange, the price has updated specifically for the customer number you’re creating the order for. Once updated, this can be considered accurate invoiced cost.

Price is BLACK before iUNFI receives your specific price.

Price is ORANGE after iUNFI receives your specific price. Price is stored for three days.

Price is ORANGE after iUNFI receives your specific price. Price is stored for three days.
Getting Started with your iUNFI Device

Customer-Specific Pricing For Broadline Accounts

**Single View:** As items are added to an order, update price quickly and easily by tapping on any product on “List View” to view in “Single View.” When connected to the internet, iUNFI will automatically update the price of the item you’re viewing. As price updates, iUNFI will update and highlight your customer-specific cost in orange for easy reference and say “Your Cost*:

Price is **BLACK** before iUNFI receives your specific price.

Price is **ORANGE** after iUNFI receives your specific price. Price is stored for three days.

**Order Info:** As prices are updated for products in your order, Order Info will calculate the total cost of all items on your order, whether or not they’ve updated price. If some products are still listed at their wholesale cost, Order Info will show the total based on a combination of wholesale and customer-specific costs. To make sure Order Info accurately calculates the price of an entire order, be sure to update each product’s price. Quickly update the price of the products in your order by viewing an item in “Single View” and swiping from right-to-left to switch to all the other products in your order. Price will update as each product is viewed.

Order Info:

<table>
<thead>
<tr>
<th>Name</th>
<th>Sarasota</th>
</tr>
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<tbody>
<tr>
<td>Date</td>
<td>10/24/16, 2:23 PM</td>
</tr>
<tr>
<td>Conf. Num.</td>
<td>Not Yet Sent</td>
</tr>
<tr>
<td>Line Count</td>
<td>6</td>
</tr>
<tr>
<td>Cat. Cost</td>
<td>$200.51</td>
</tr>
<tr>
<td>Total Items</td>
<td>6</td>
</tr>
<tr>
<td>Unit Type</td>
<td>Count</td>
</tr>
<tr>
<td>Case</td>
<td>6</td>
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</tbody>
</table>

*Your price reflects an estimated cost. Any applicable taxes or shipping costs are not figured. Although prices displayed are considered accurate, they are subject to change.

For additional questions, please contact iUNFI@unfi.com
Customer-Specific Pricing For Broadline Accounts

When You Are Not Connected: If you are using iUNFI and viewing the details of a product and DO NOT have a wi-fi or cellular data network connection, iUNFI will display non-invasive alerts to clarify that it is NOT downloading prices.

If you view an item that has already had price updated while you’re not connected to the internet, iUNFI will continue to display the price it updated to.

However, if you have NOT updated the price of an item and you are NOT connected, iUNFI will continue to show wholesale cost ONLY.

Device is NOT connected to the internet, but HAS previously received your specific price for this product, so iUNFI continues to show your specific price.

Device is NOT connected to the internet and HAS NOT previously received your specific price for this product, so iUNFI continues to show
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TROUBLESHOOTING TIPS

On the occasion when a device may be behaving buggy, please attempt one of the following:

App Cleaning:
Double tap the home button & clear the app out of memory by:

- **iOS 6 or earlier:** Press and hold one of the apps showing until all the apps in tray shake and red circles with white minus signs appear. Tap on the red circle of an app to clear it out.
- **iOS 7 or later:** Simply swipe each app up

This can be done regularly to conserve battery life or when app runs slow. (Data will not be lost)

Two-Button Reset:
Press and hold the home and power buttons until it turns off; wait until the Apple logo reappears.

Scanner Issues:
Most issues can be resolved by restarting iUNFI as directed underneath “App Cleaning” on this page

Make sure your Bluetooth scanner is paired in Settings
- Open Settings
- Select Bluetooth
- If “Socket CHS […]” does not say “Connected,” tap to initiate connection
- Complete “App Cleaning” steps on this page

Factory reset and re-pair your Bluetooth scanner to your device
- Scan the below barcode
- Follow the steps outlined in the “Connecting Your Bluetooth Scanner” section

Resources:
www.iunfi.com is a fantastic resource to answer many Frequently Asked Questions about the device and application, as well as provide other helpful hints on usage. If you do not see your question/answer, The Chat feature is available 9AM-5PM EST, where an agent may be able to walk you through a solution.

If any of the above doesn’t solve your issue, please contact one of our support teams [see next page].
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BARCODE INDEX

iOS Mode – To Allow your Bluetooth Scanner to communicate with iUNFI

Factory Reset – Resets your scanner back to original factory settings.

Beep On – Turns on the audible response sounds from the scanner after scan

Beep Off – Turns off the audible sounds from the scanner after scan

Vibrate On – Turns on the vibration feedback from the scanner after scan

Vibrate Off – Turns off the vibration feedback from the scanner after scan

For additional questions, please contact iUNFI@unfi.com
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SUPPORT CONTACTS

iUNFI app/device (technical) support:
For technical issues or questions about the iUNFI app or device, please contact iUNFI Support at Support@EnterpriseMobile.com or 877-362-6291 for 24/7 support (including major holidays)!

Account Number, Log-In and Post-Order Issues:
Customers may contact Customer Care at WebAdminSupport@unfi.com

Note: Please have username, account number and other relevant information like order confirmation # for order issues when contacting iUNFI support or customer care so we can help you faster!

FOR UNFI Associates: Managers must add account numbers for you; please email iunfi@unfi.com if they are unavailable. Call the UNFI help desk (X3555) for log in resets.

iUNFI Team Contact Information:
• Team email: iunfi@unfi.com