Tip! Use controls at top to “Fit to page”

To help you meet MOXē, we give you…

The MOXē Companion

List Management

Click Here to Begin

Click Here to Skip Intro

LAST UPDATED: 9/11/2022

How to navigate the MOXē Companion

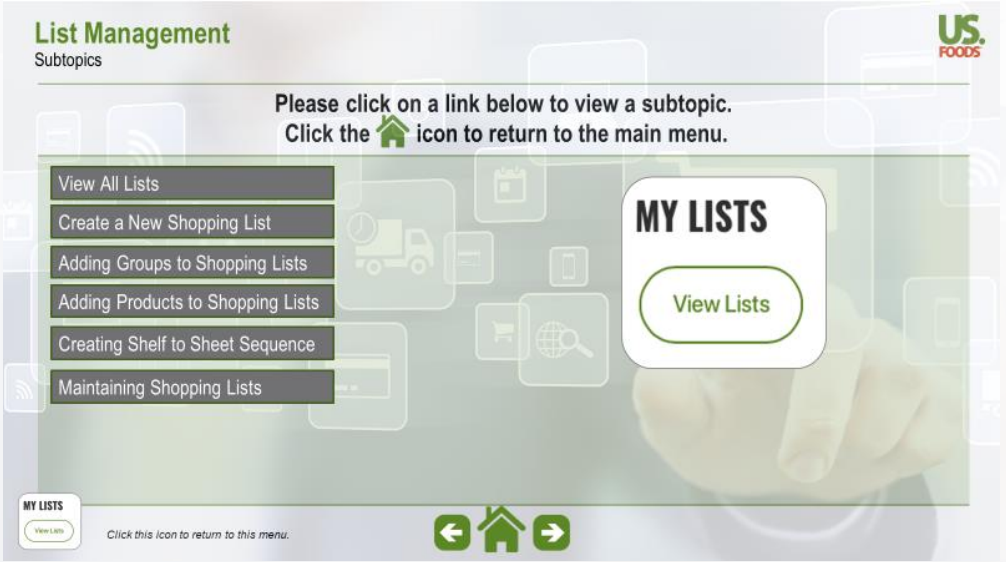
Your MOXē Companion is designed as an interactive manual to provide information on key functionality.

In the future, you can go directly to the “Main Menu” by clicking on the “Home” icon from any page.

Directional arrows enable “Backward” and “Forward” page navigation.

Your navigational page or “Main Menu” provides an interactive pathway to key functions in MOXē.

Directional “Pins” enable navigation on device images



List Management

Subtopics

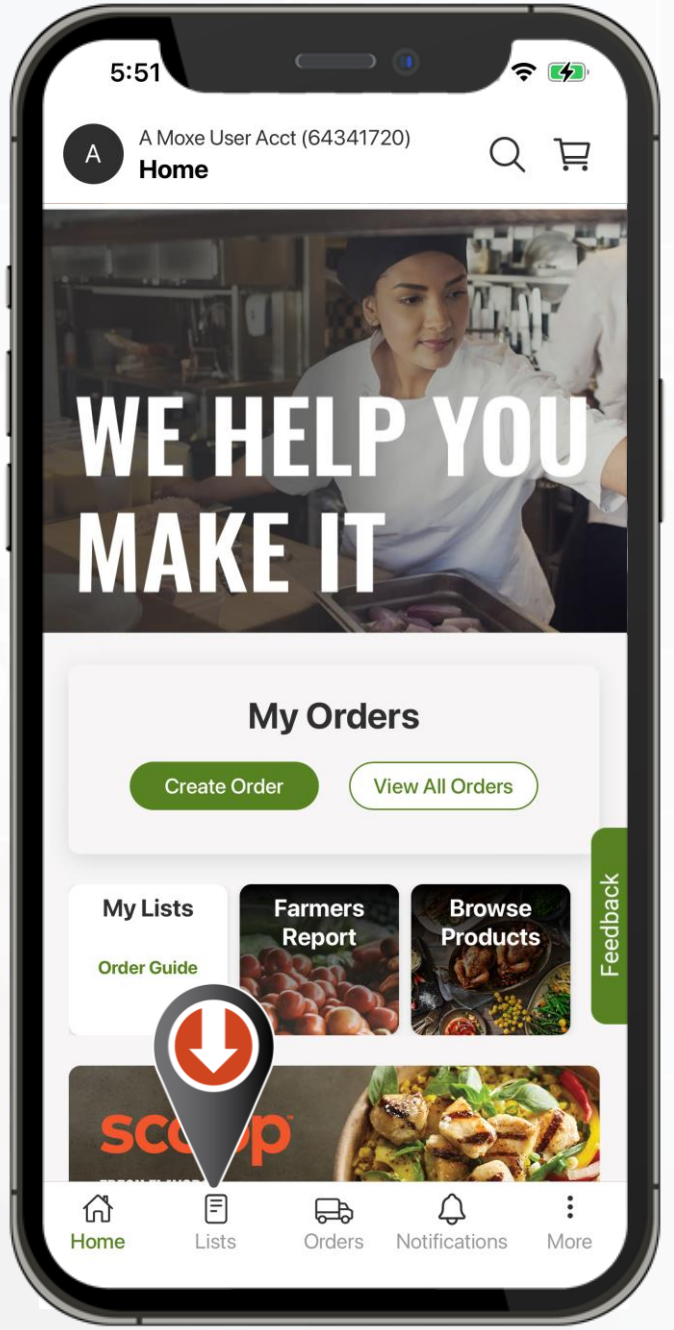
Please click on a link below to view a subtopic.
Click the icon to return to the main menu.

- View All Lists
- Create a New Shopping List
- Adding Groups to Shopping Lists
- Adding Products to Shopping Lists
- Creating Shelf to Sheet Sequence
- Maintaining Shopping Lists

List Management

View All Lists

To Create a Shopping List, select "View All Lists" from the desktop Home page or the Lists icon on mobile.

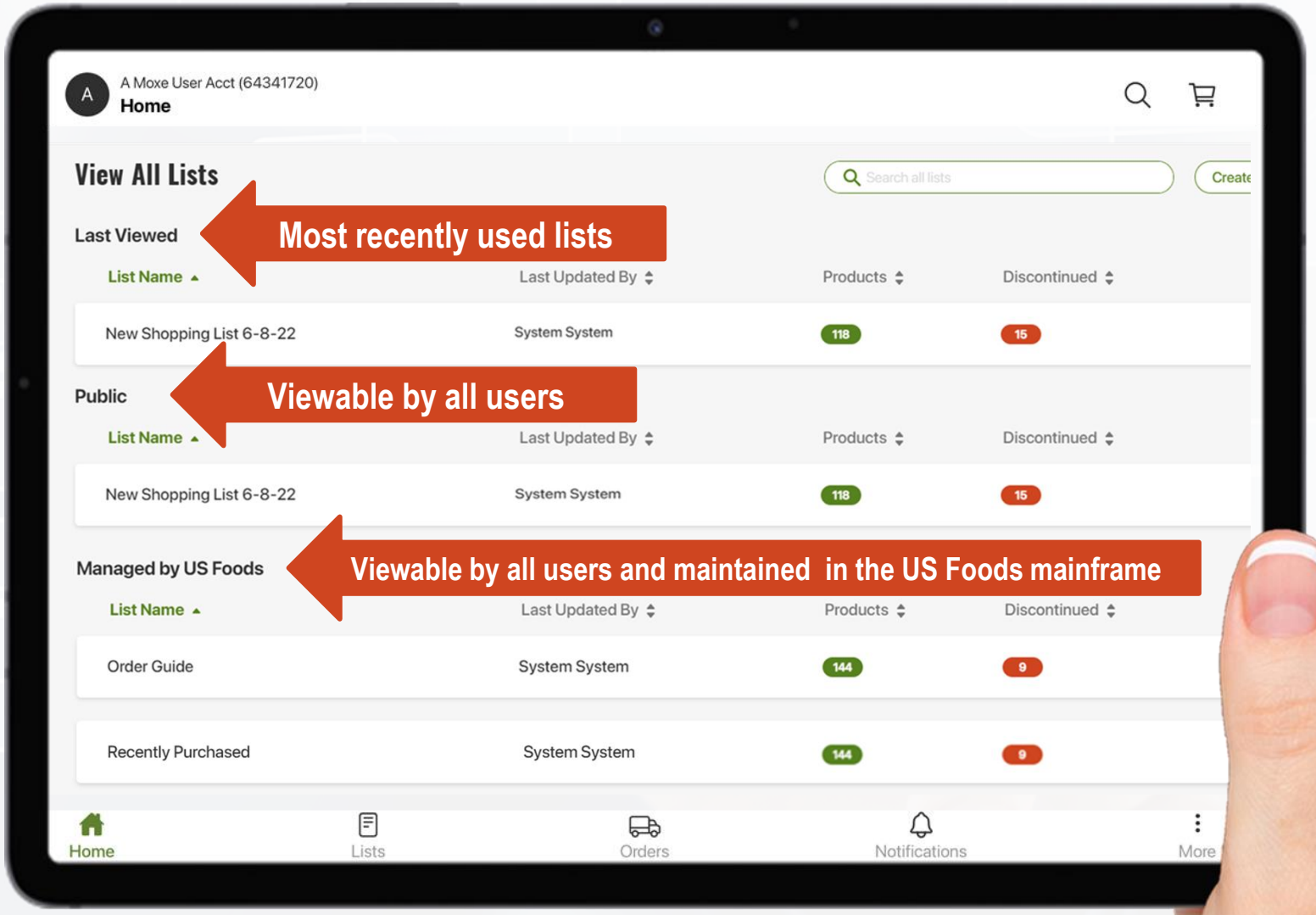


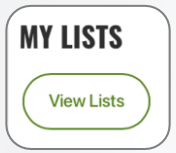
List Management

View All Lists

List Management home screen.

List types and visibility guidelines.





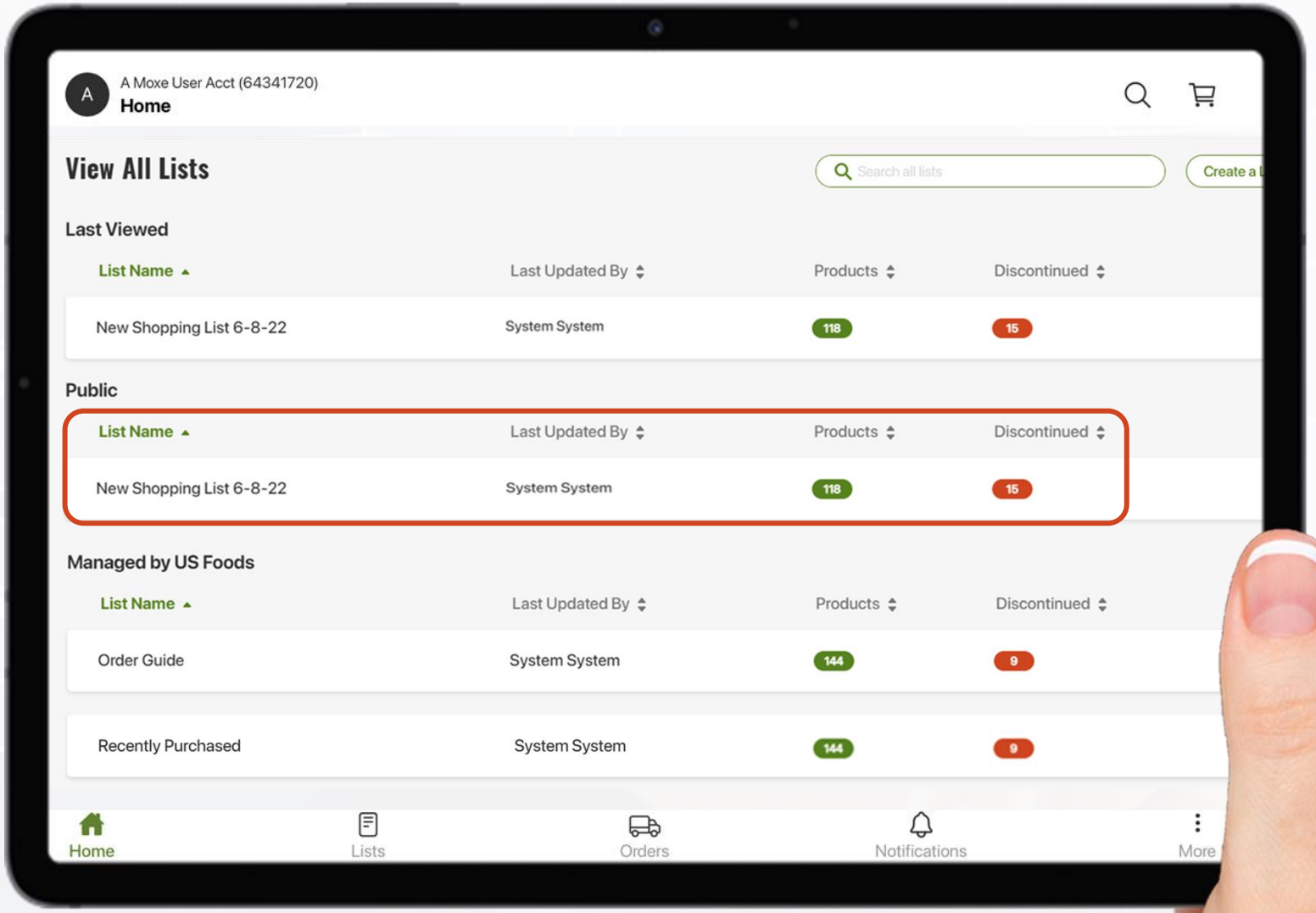
List Management

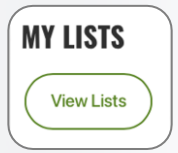
View All Lists

List Management Home Screen.

Each List displays:

- List Name
- Last Updated By
- Number of Products on the list
- Number of Discontinued Items requiring attention

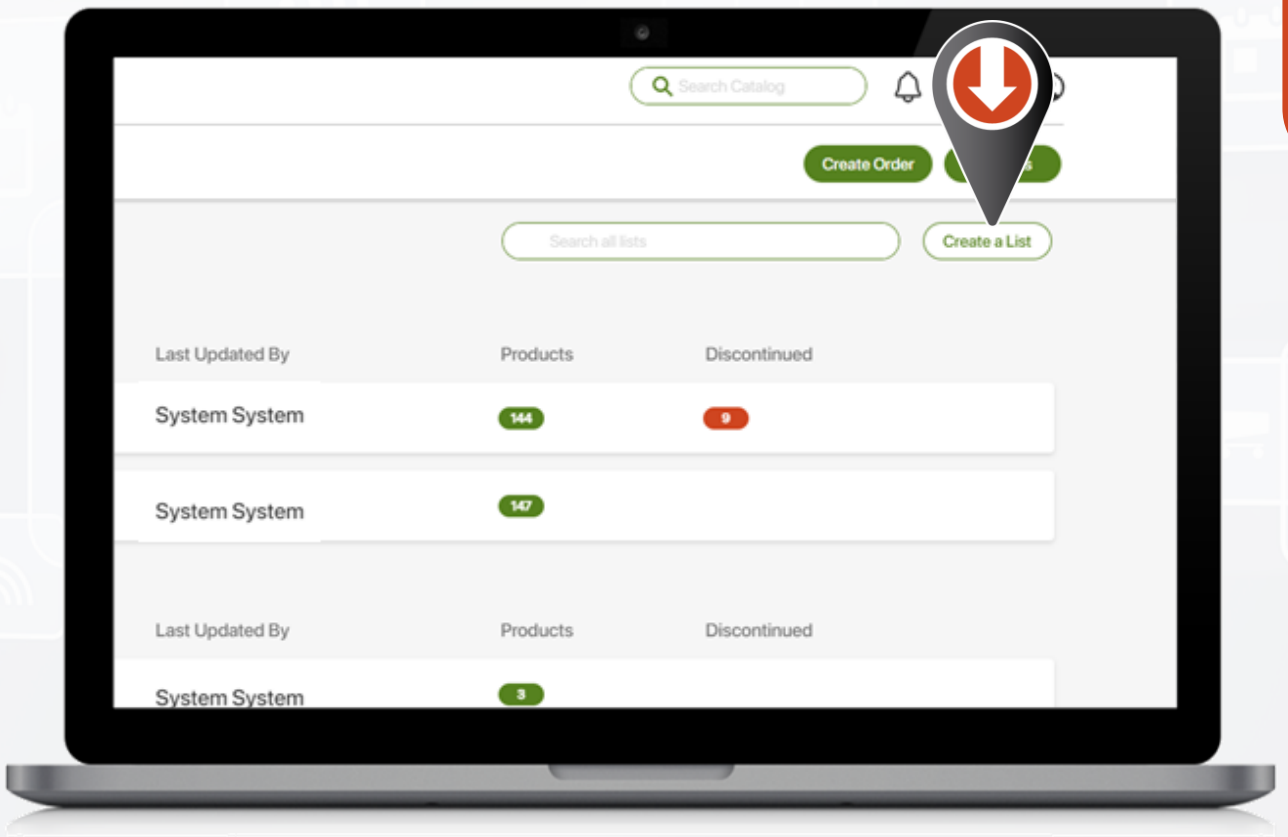


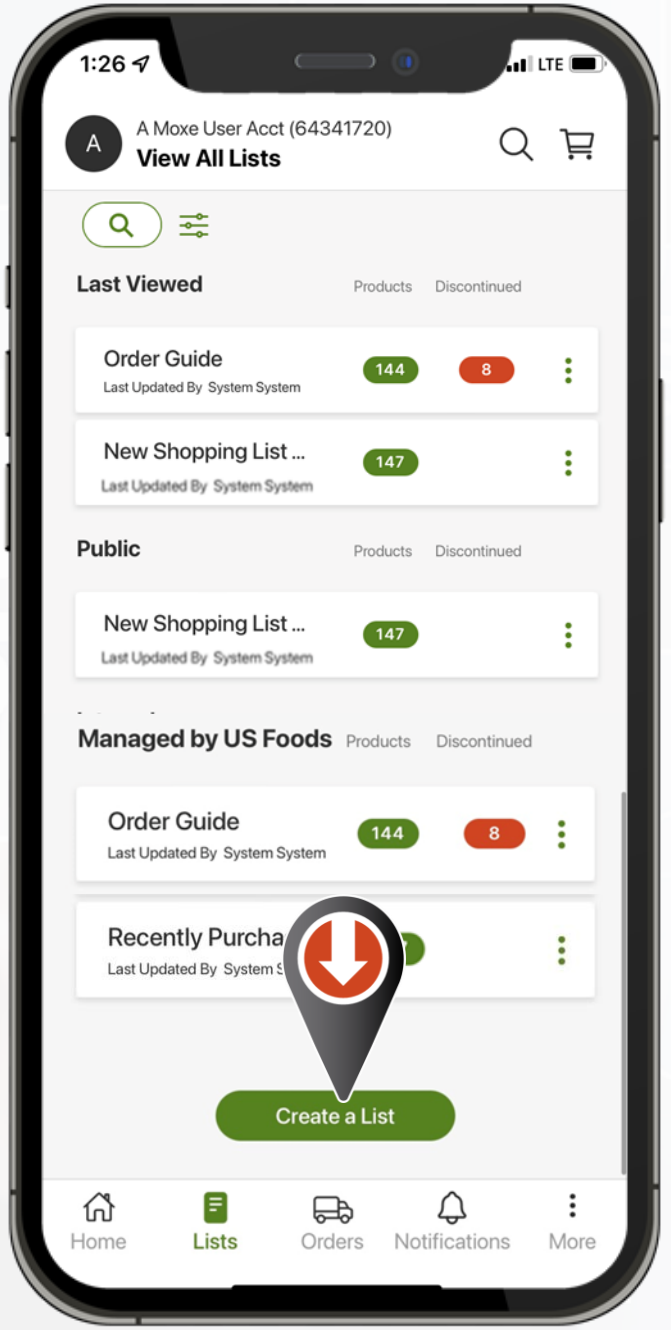


List Management

Create a New Shopping List

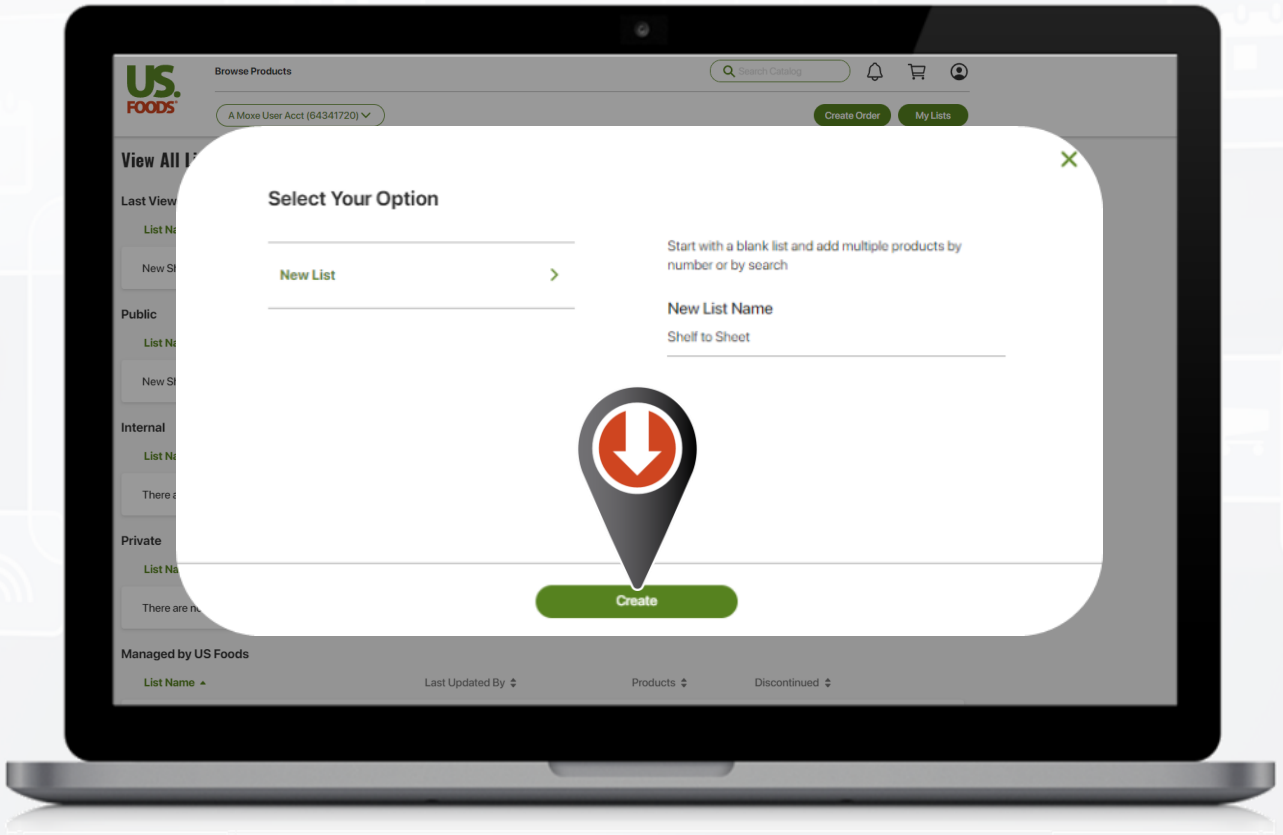
To begin a new Shopping List, select "Create List".



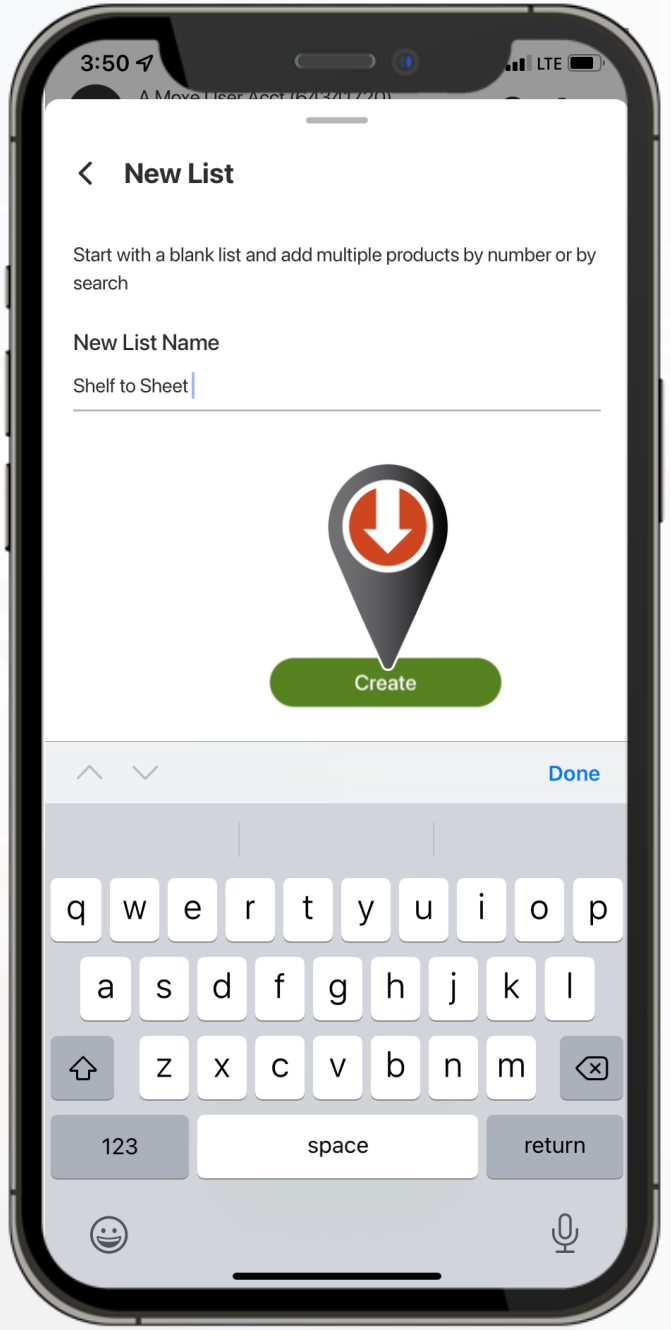


List Management

Create a New Shopping List

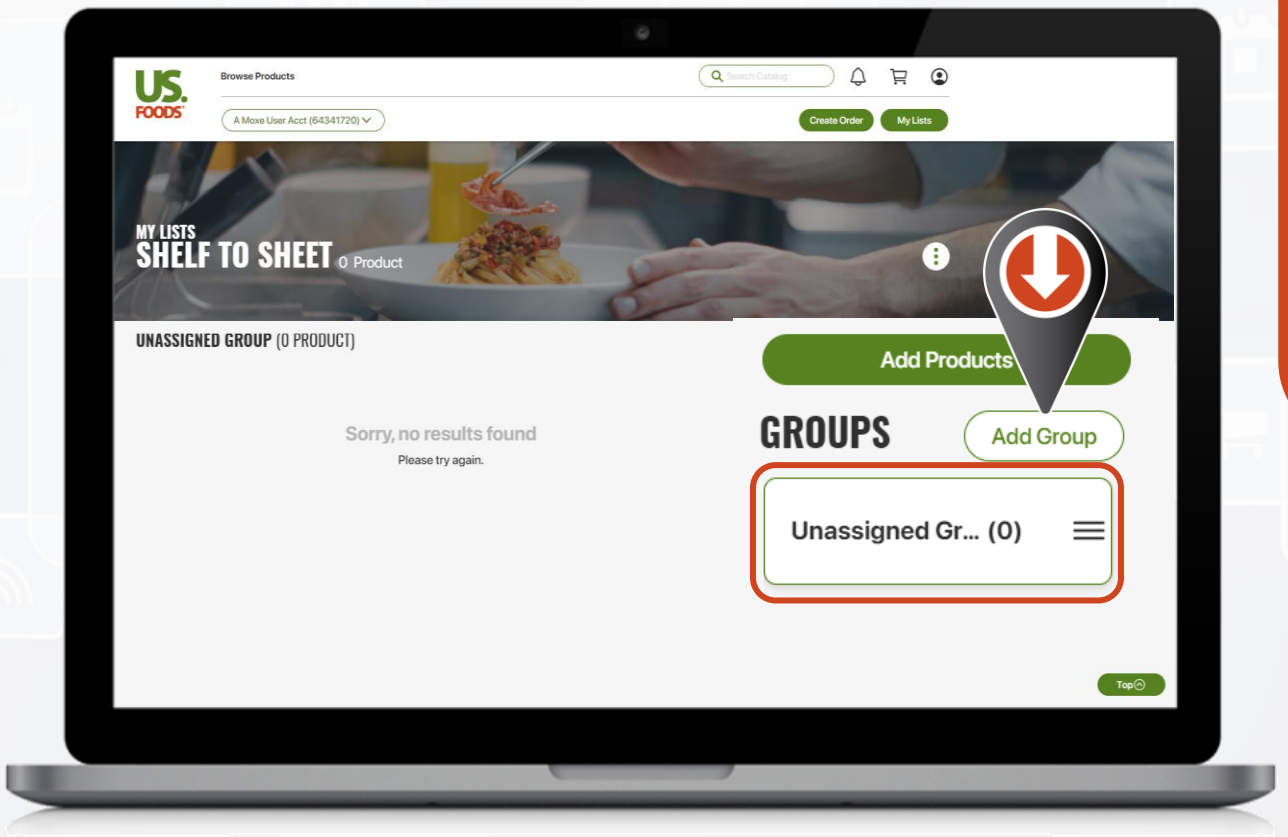


Enter a unique name for your list and select Create.



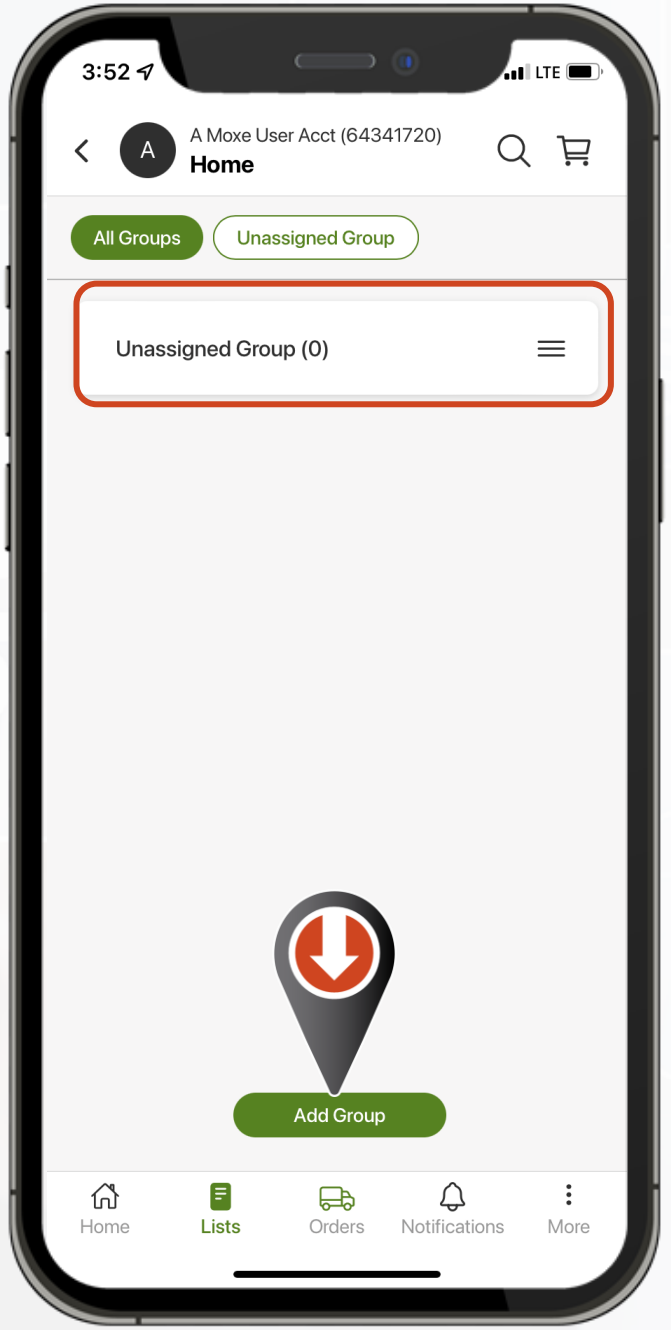
List Management

Create a New Shopping List



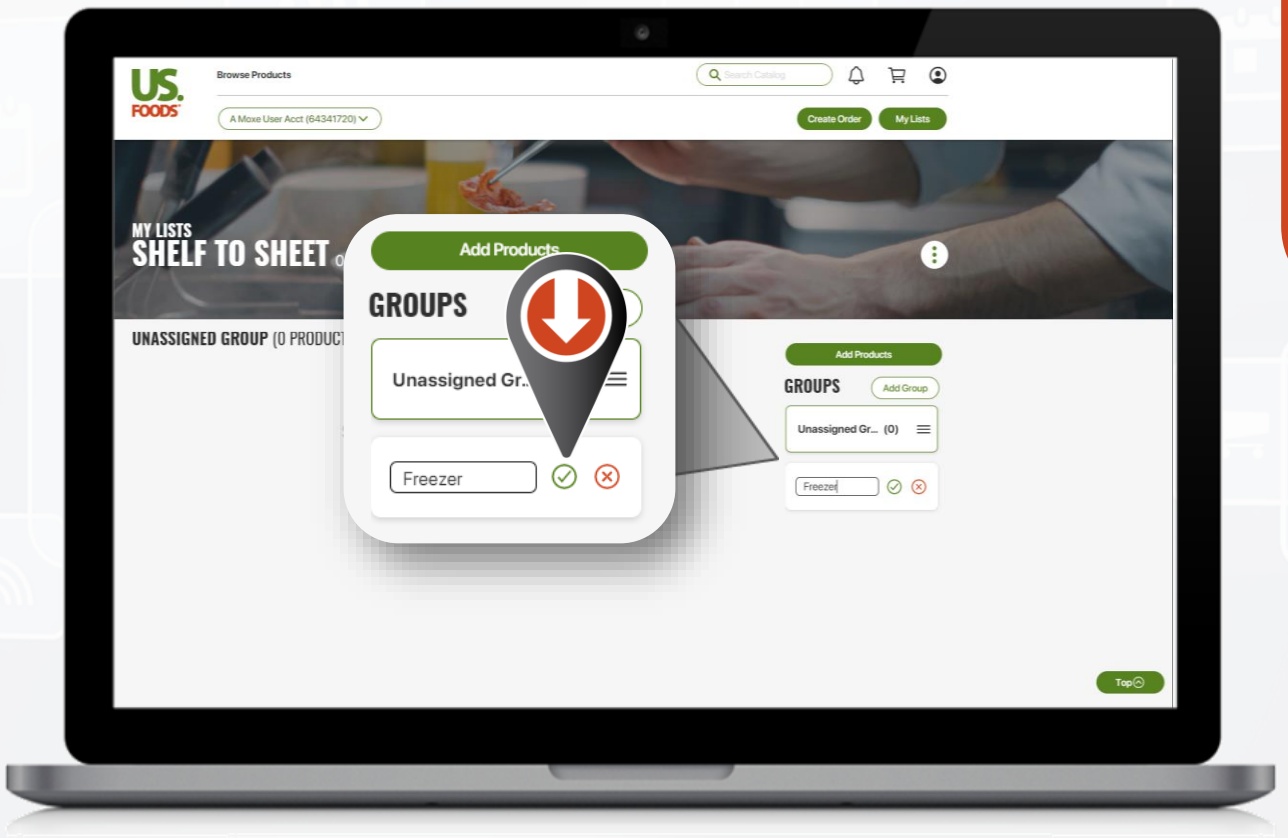
Begin adding custom groups to organize your new shopping list.

Note: The "Unassigned" group is used for any Items not assigned to a custom group.



List Management

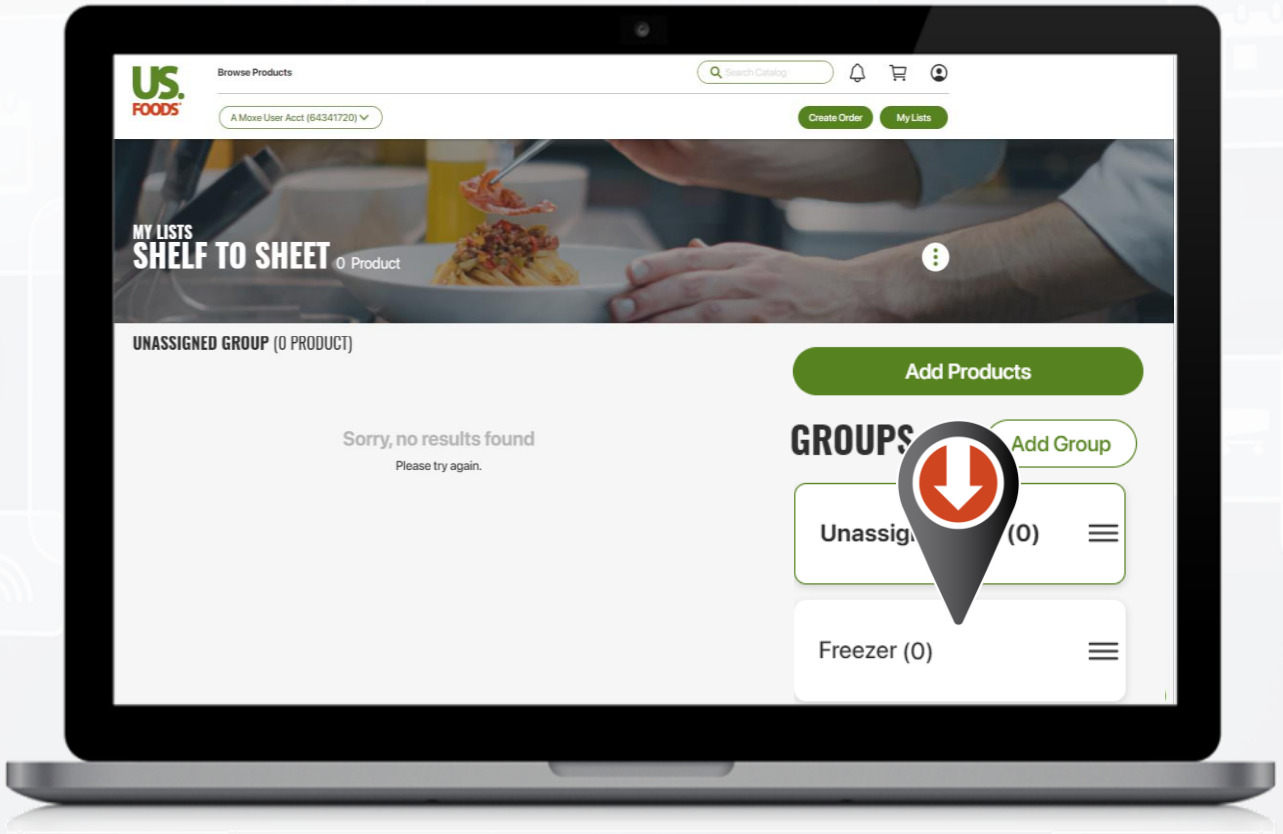
Add Groups to Lists



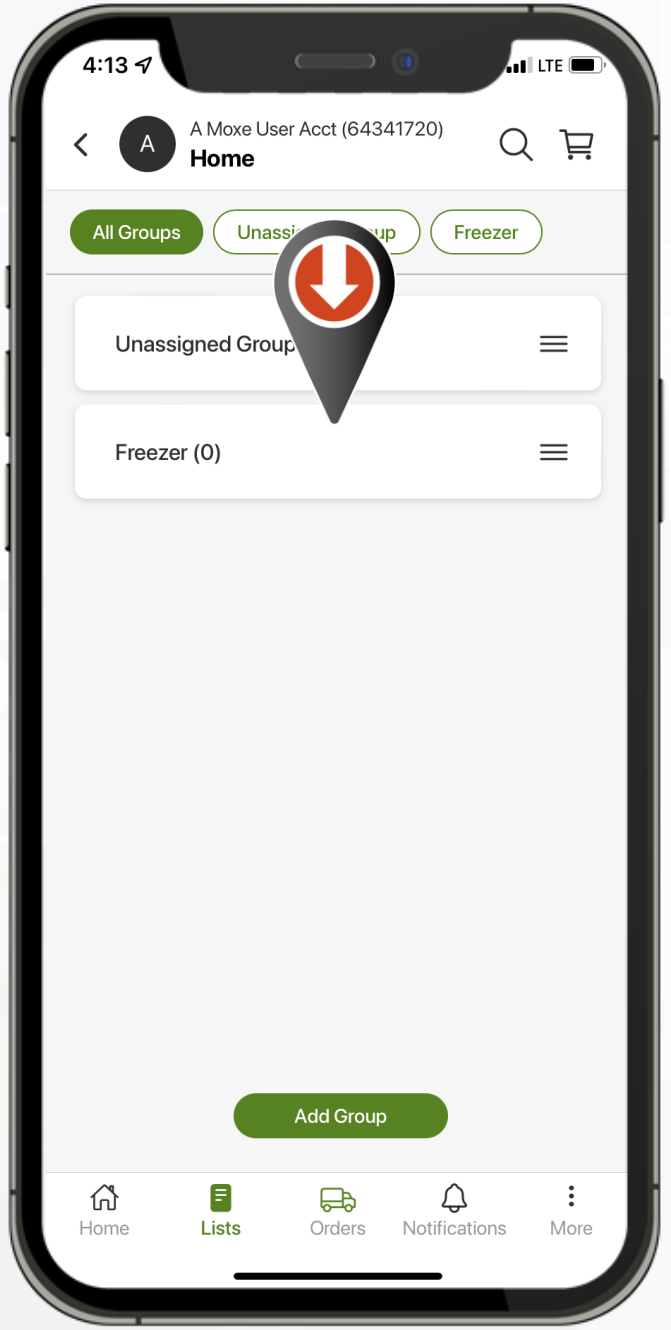
Enter the name of the Group and then select "✓" on desktop app, or "Submit" on mobile.

List Management

Add Groups to Lists



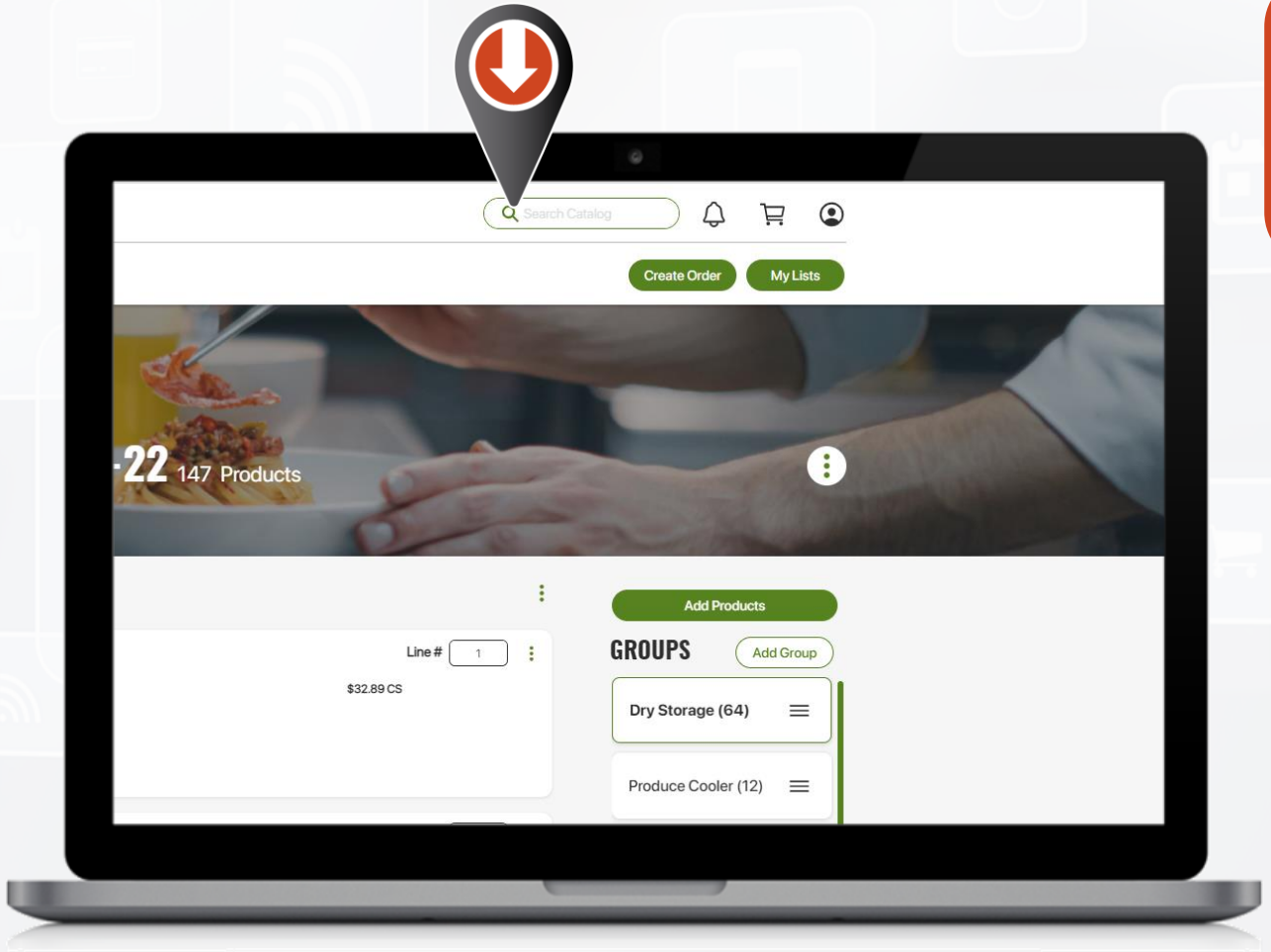
Groups will appear along the right side on desktop and in the center on mobile.

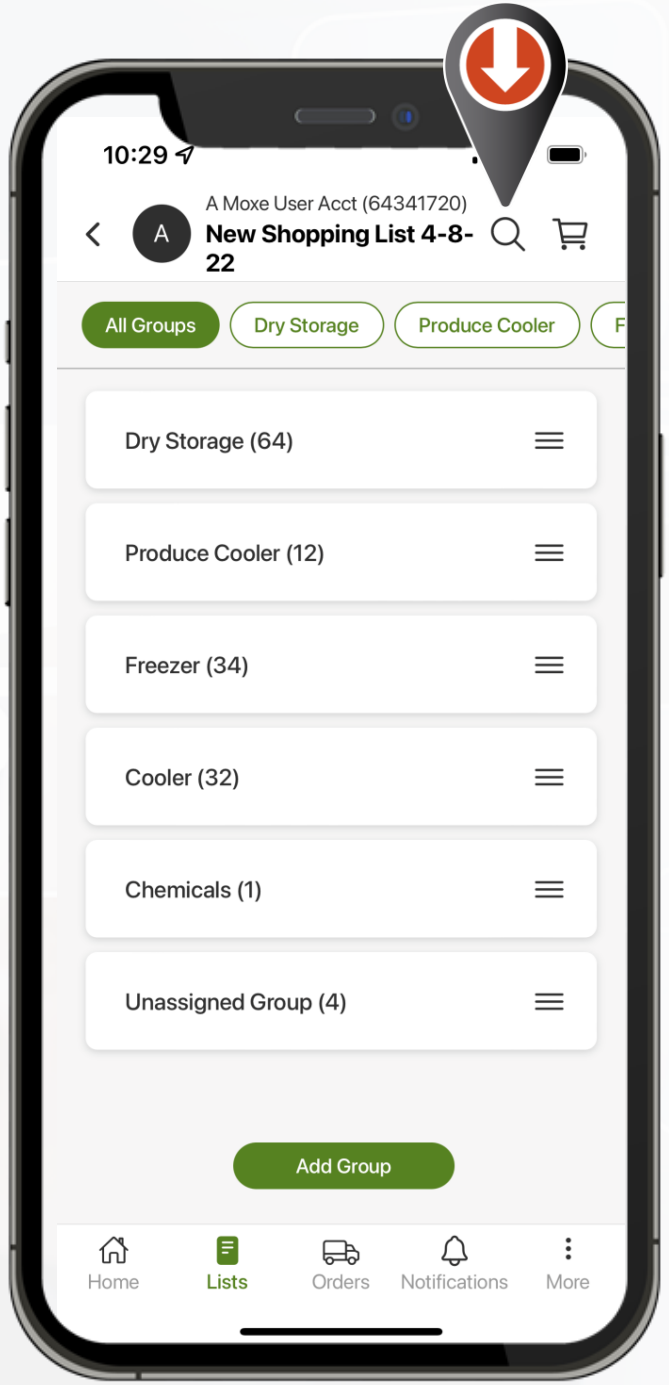


List Management

Add Products to Lists

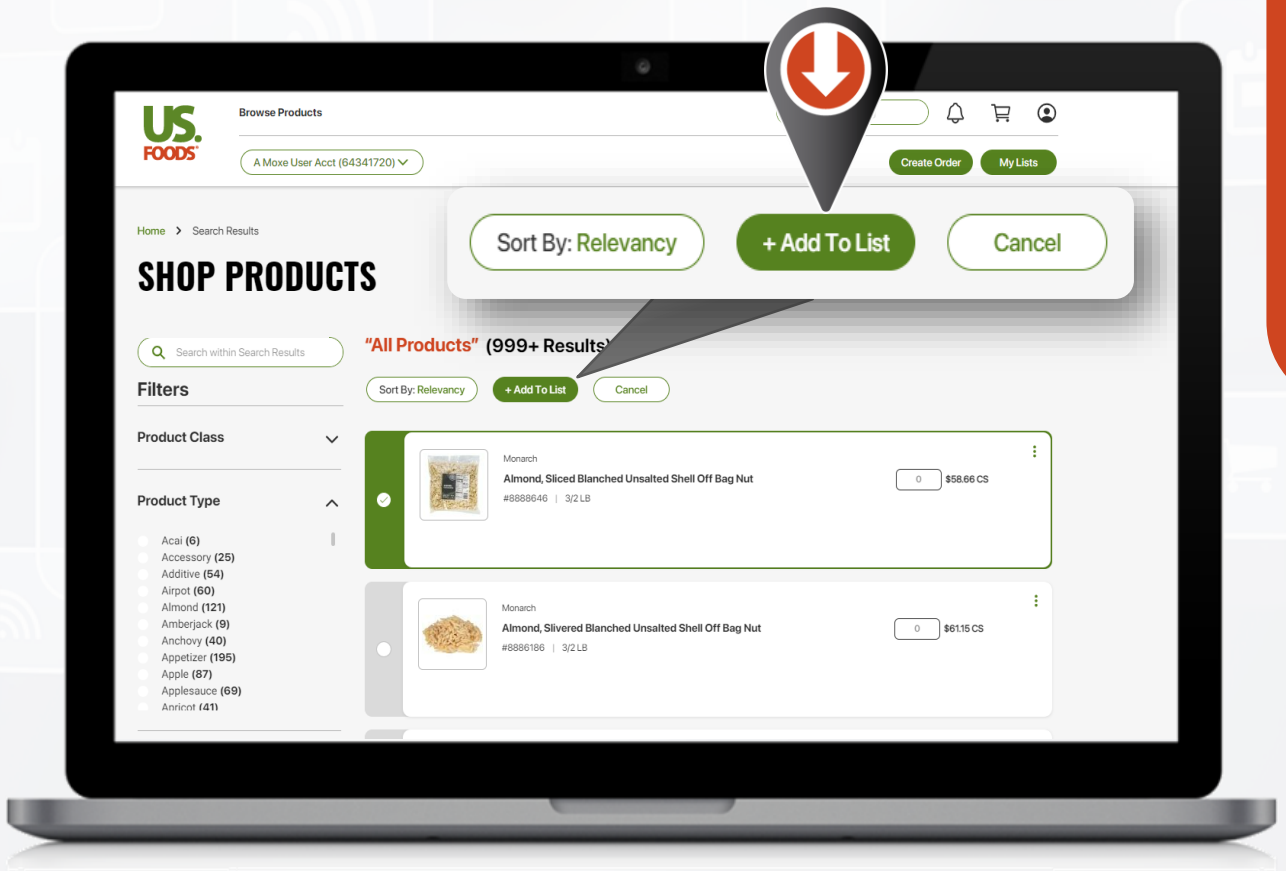
Begin your Product Search to locate items to Add to your List





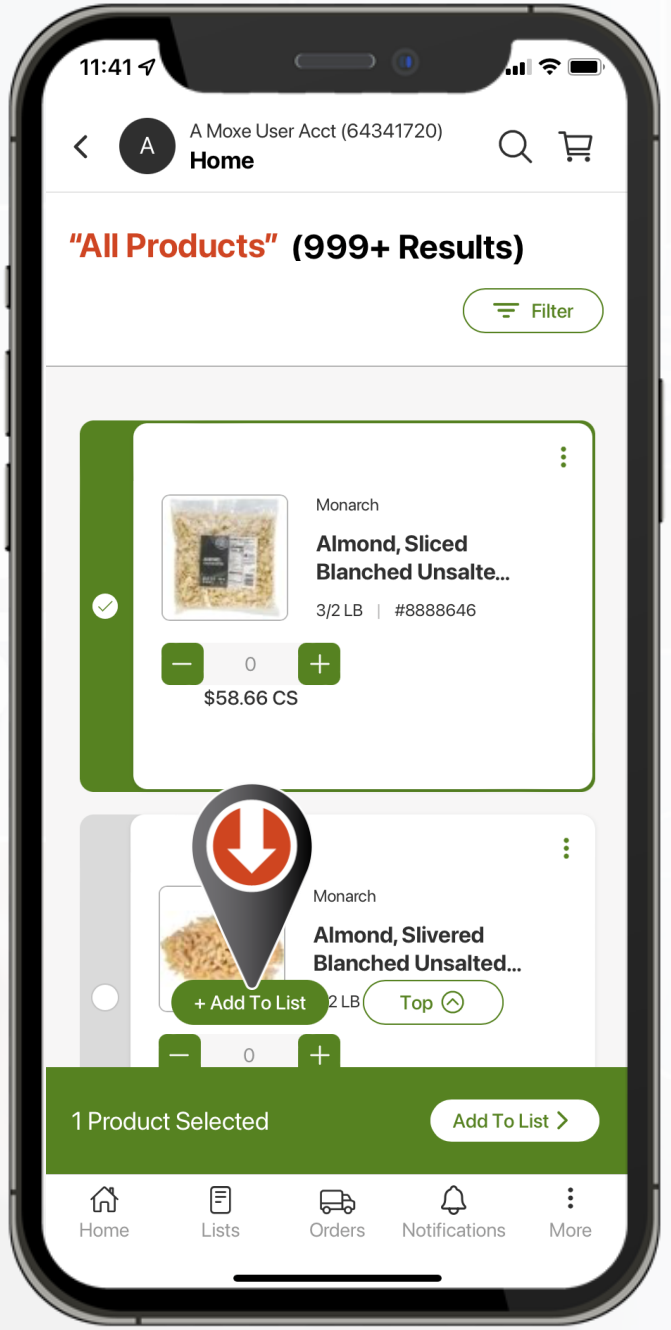
List Management

Add Products to Lists



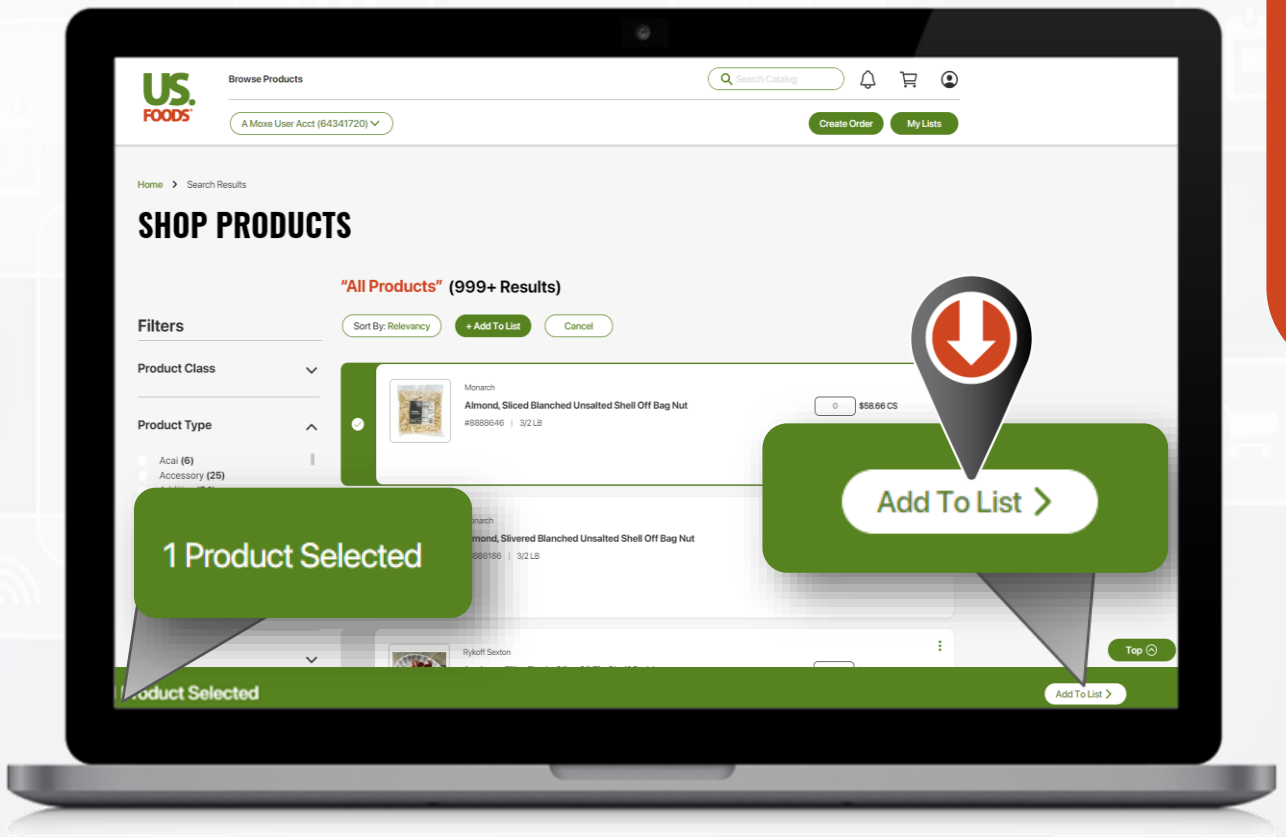
Select "Add To List" to enable the left side bar on the product cards.

When you select an item to add to your list the side bar on the product card will go from gray to green.



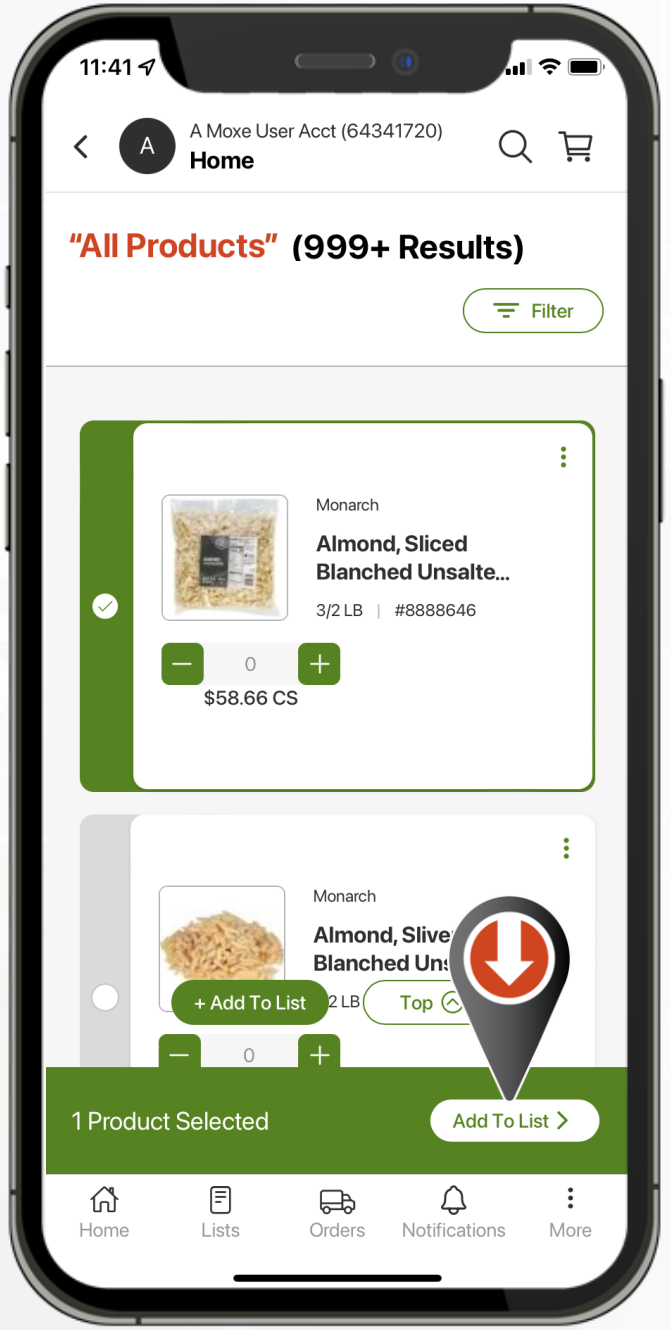
List Management

Add Products to Lists



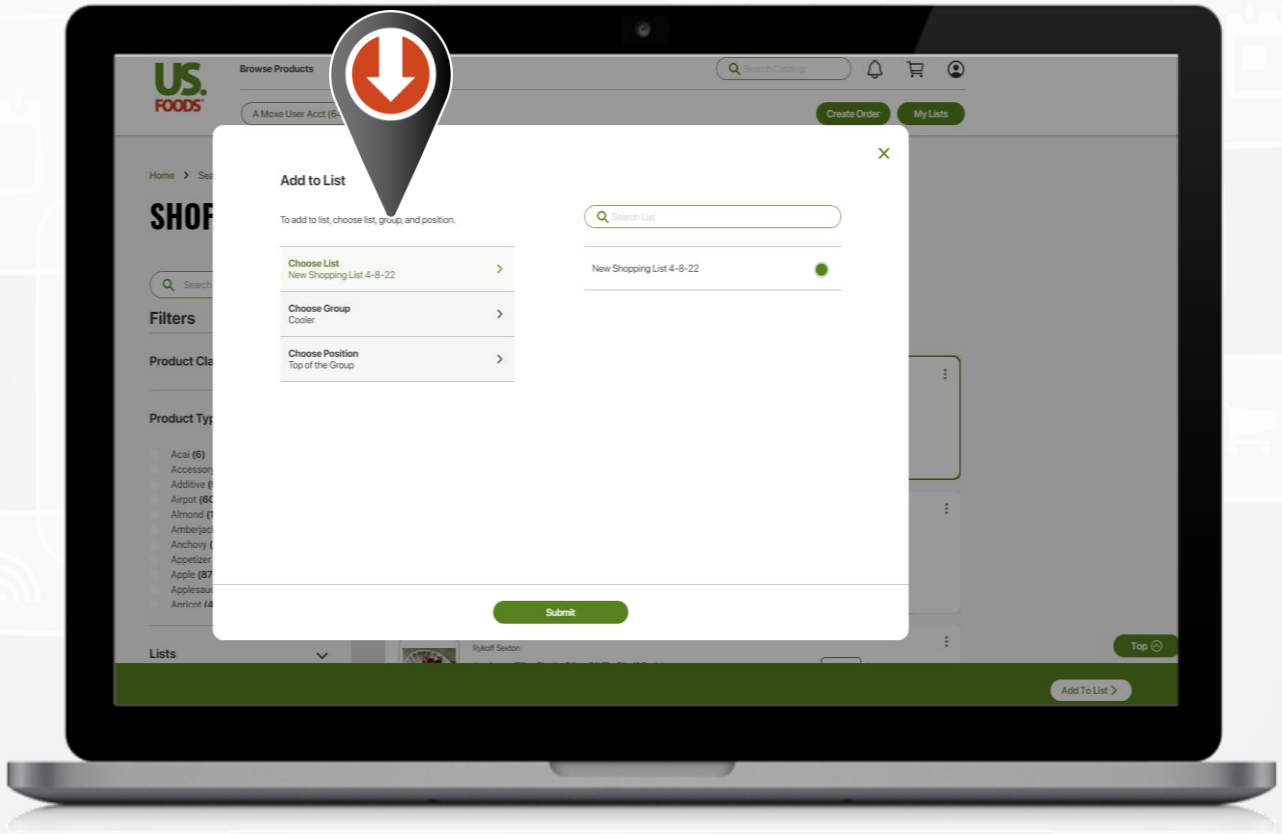
The green "Action Bar" at the bottom will show the number of products selected.

Once you have the product selected use the option to "Add to List".

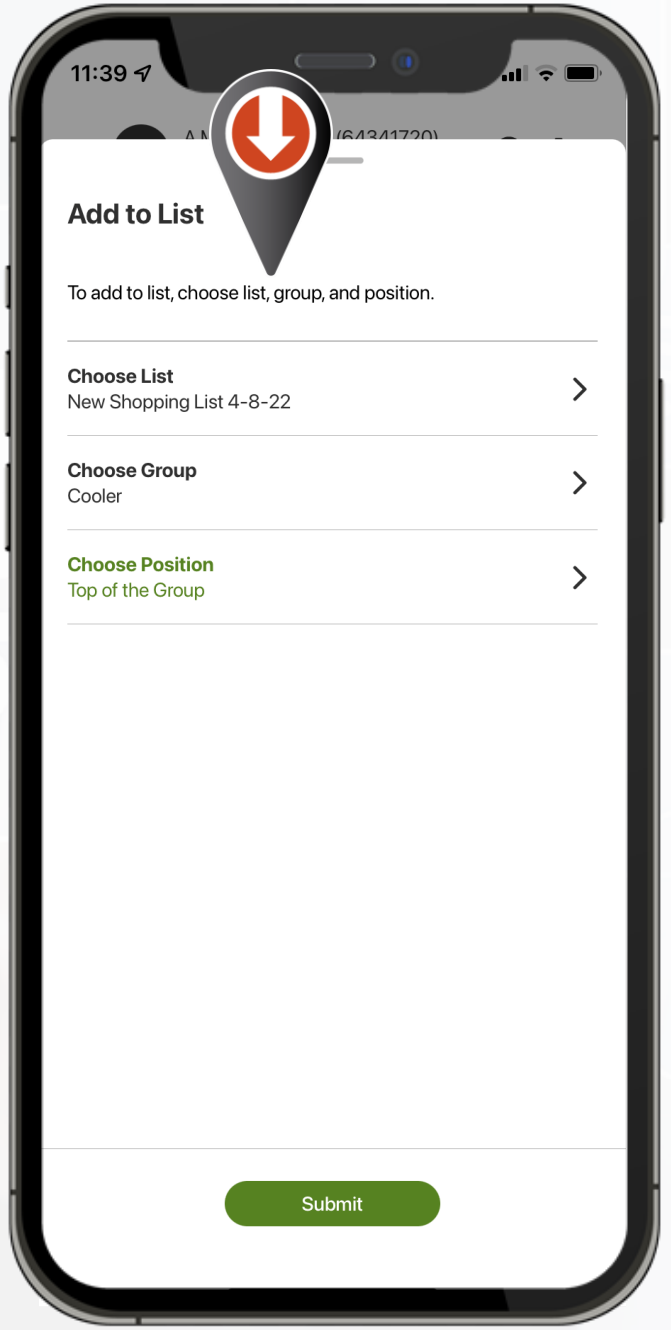


List Management

Add Products to Lists



You will have the option to select the List, Group and Position of the product to be added.



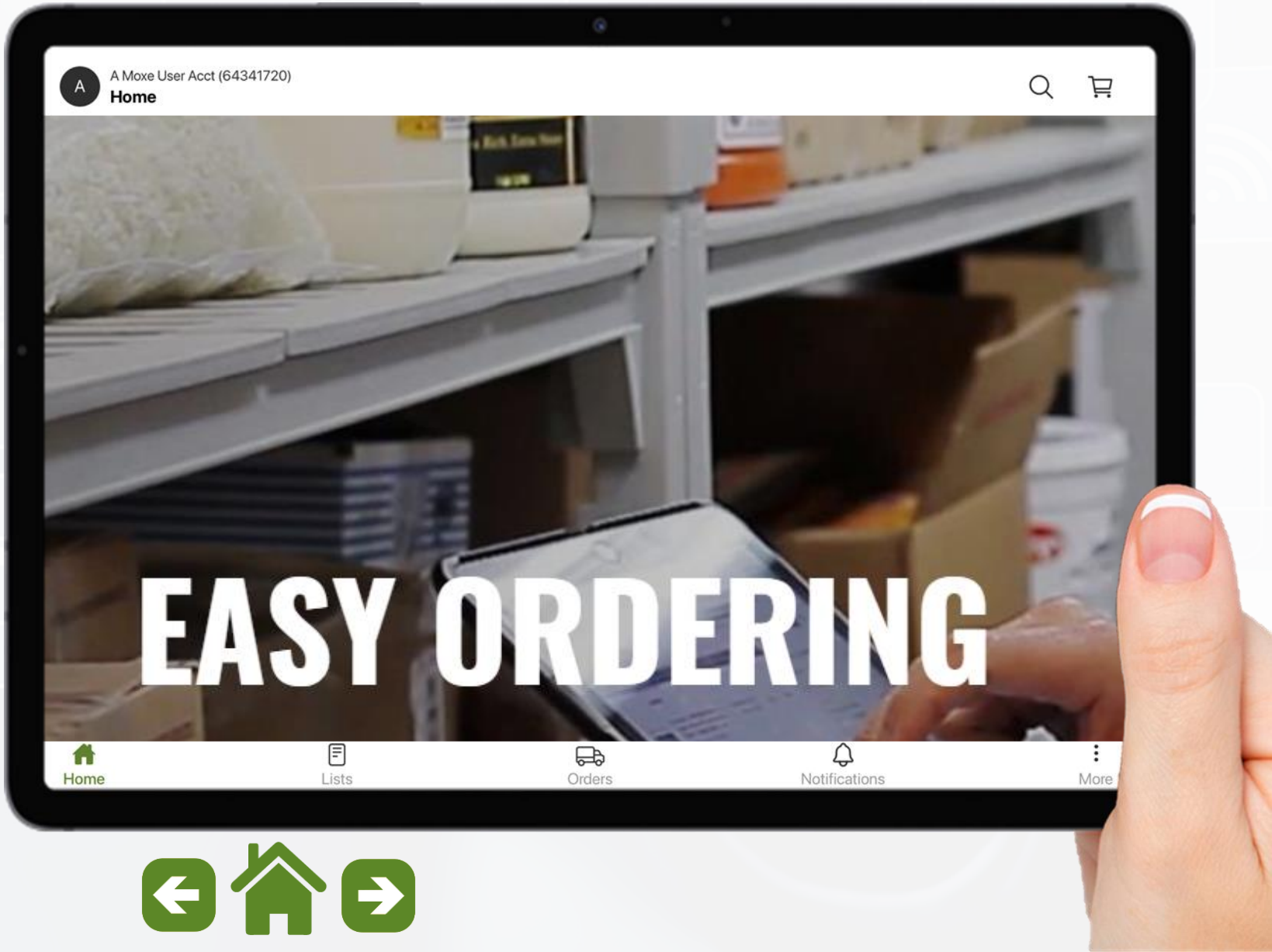
List Management

Creating Shelf to Sheet Sequence

"Shelf-to-Sheet"
simply means arranging your shopping list in a sequence that closely matches how you take inventory.

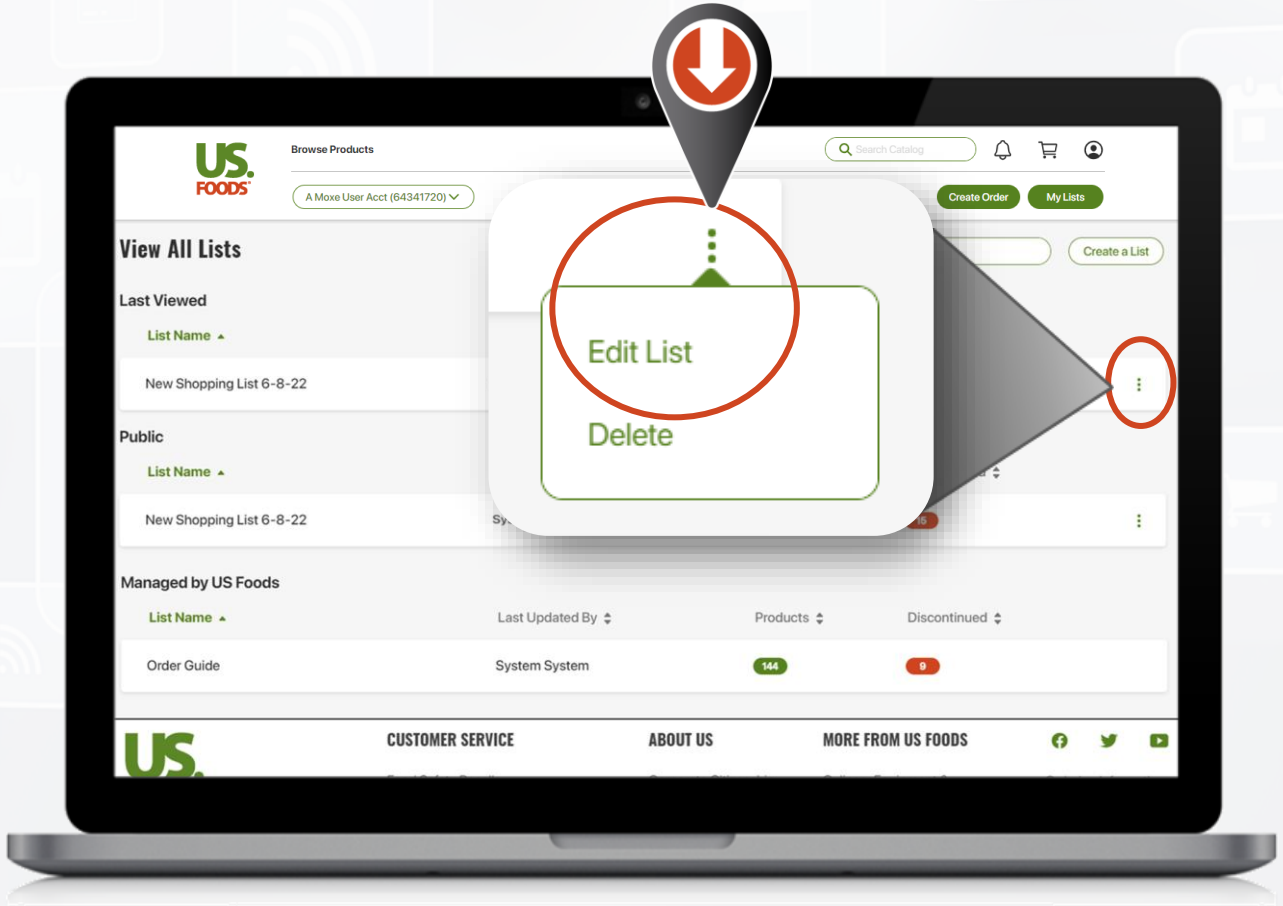
This creates an "Easy Ordering" experience and reduces time and confusion when placing orders.

Let's look at the steps to create a perfect "Shelf-to-Sheet" shopping list.



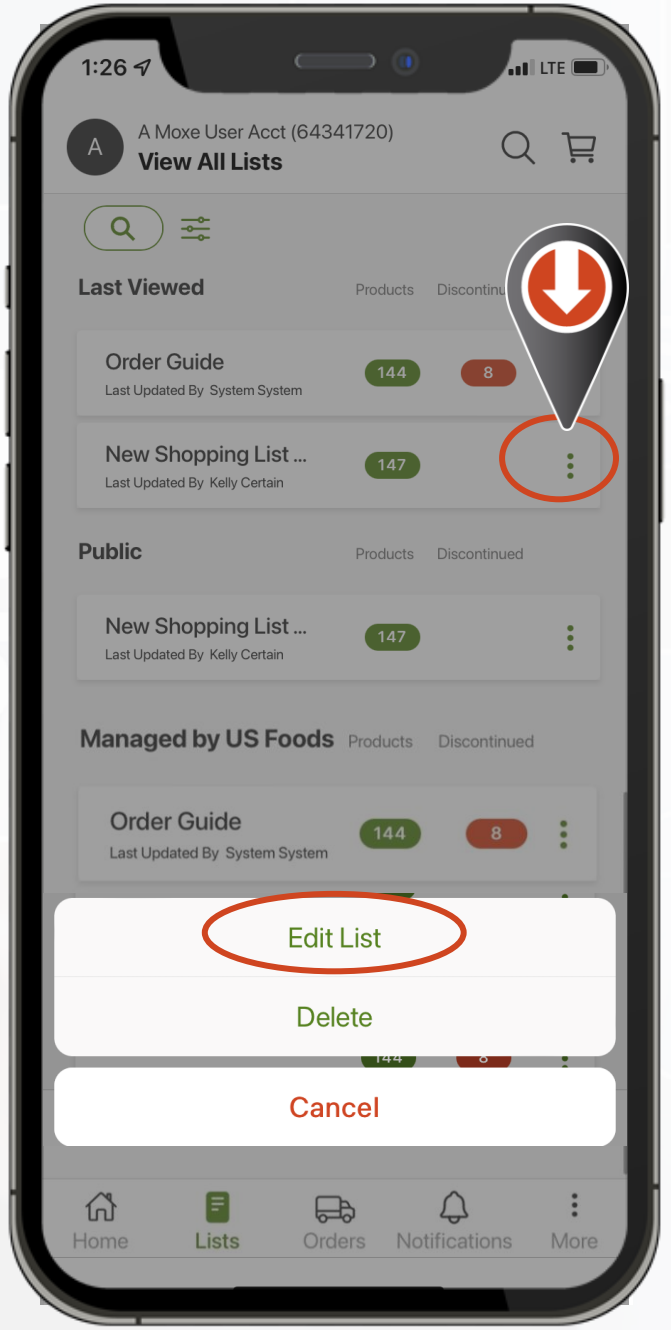
List Management

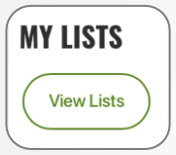
Creating Shelf to Sheet Sequence



From the View All Lists screen select the 3-dot ellipsis for the desired list.

From the pop-up, select Edit List.

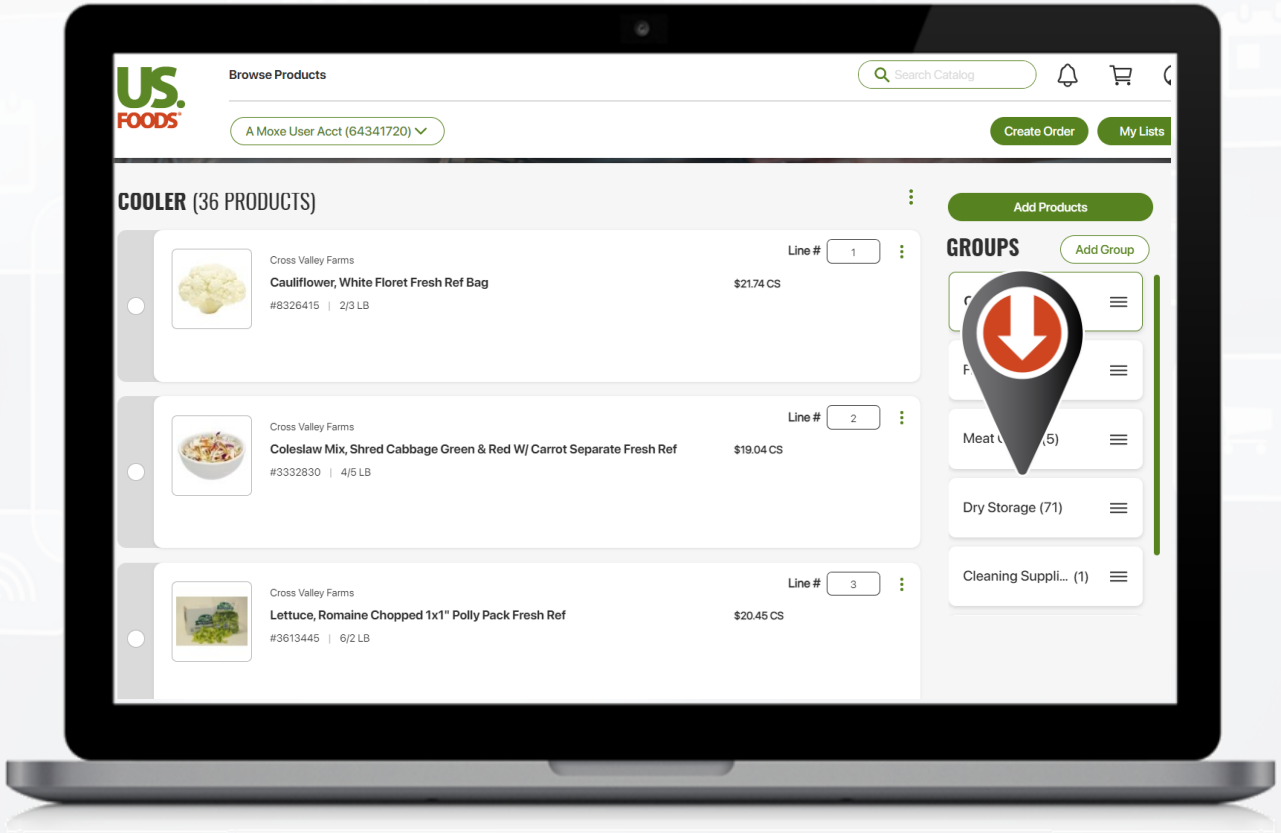


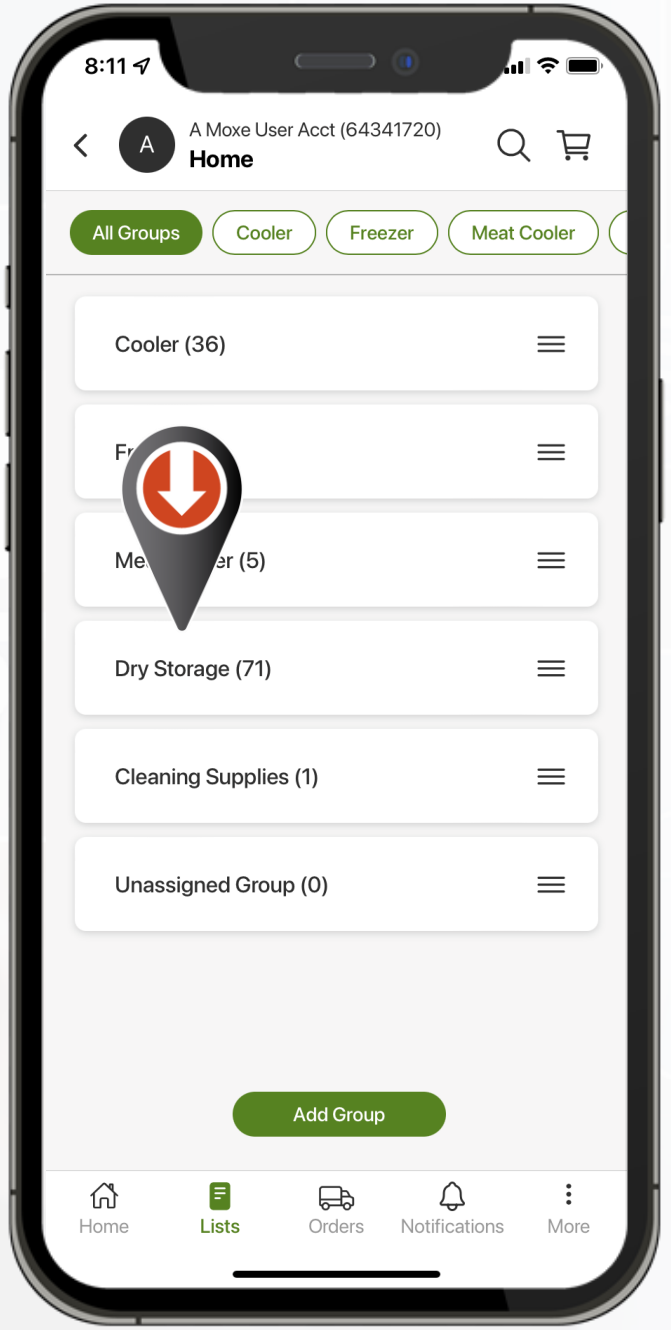


List Management

Creating Shelf to Sheet Sequence

Select “Group” you want to sequence.



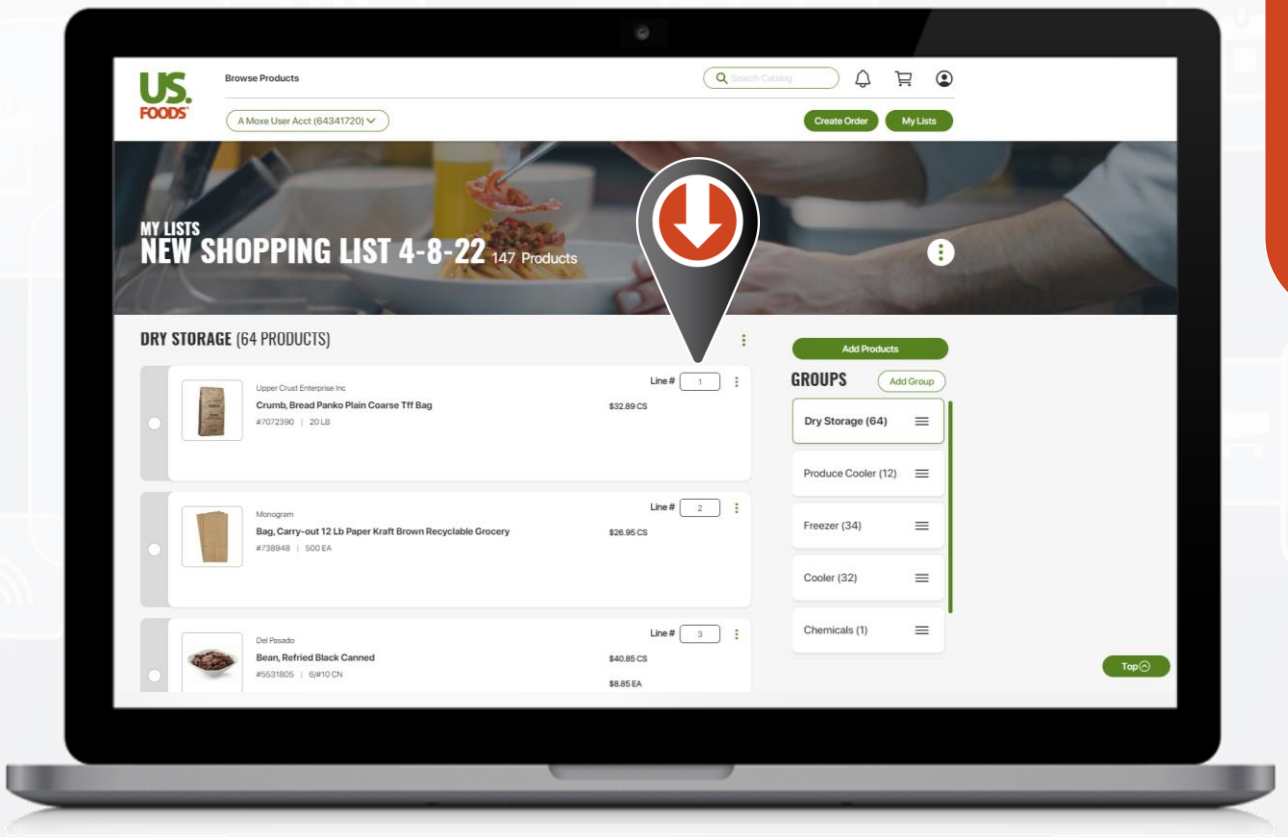


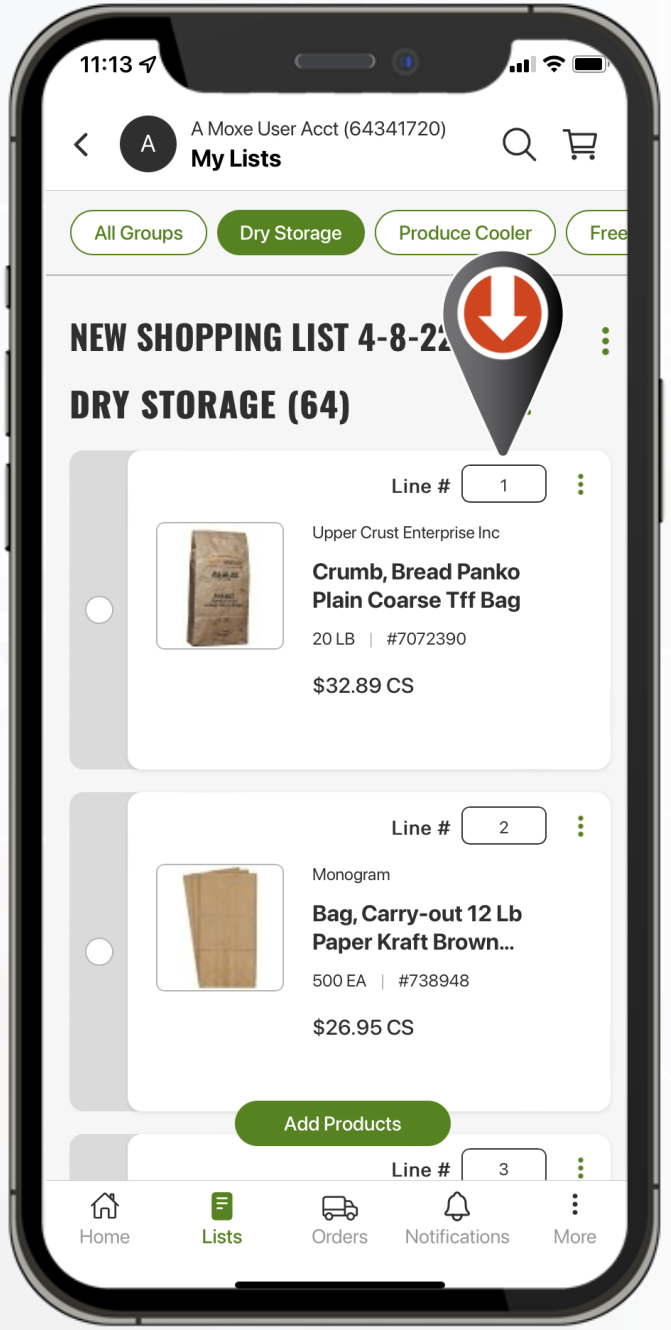
List Management

Creating Shelf to Sheet Sequence

Moving Items by "Line Number"

Change the "Line #" to move the product to the desired position within the group.



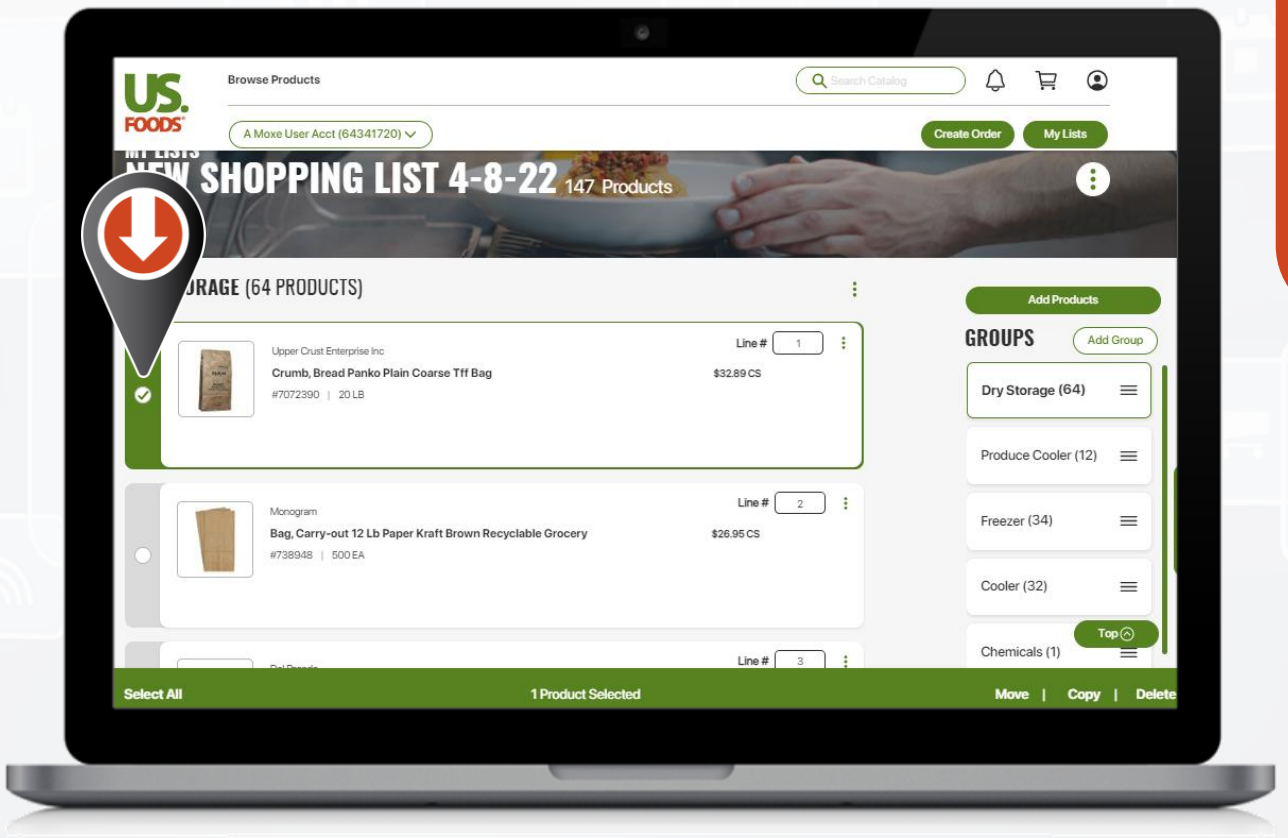


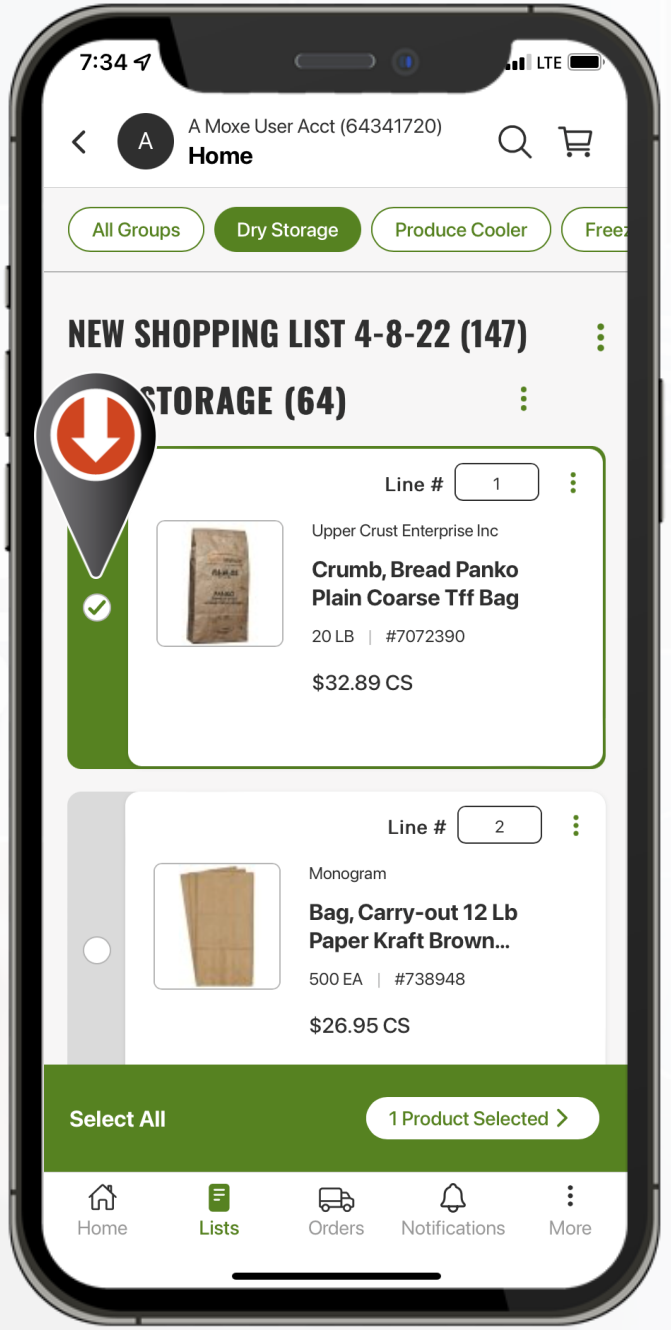
List Management

Creating Shelf to Sheet Sequence

Moving Items using the "Action Bar"

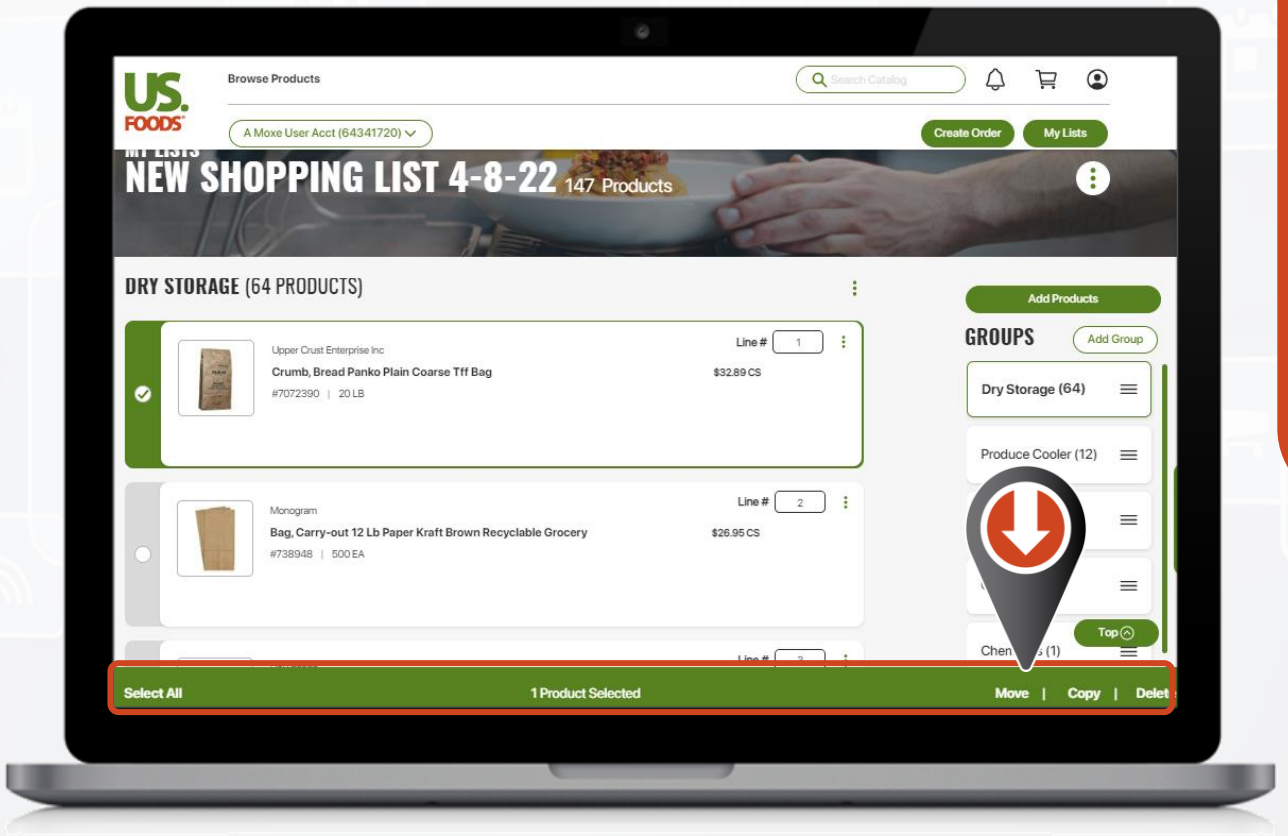
Select the radio button to the left of the product you wish to move.





List Management

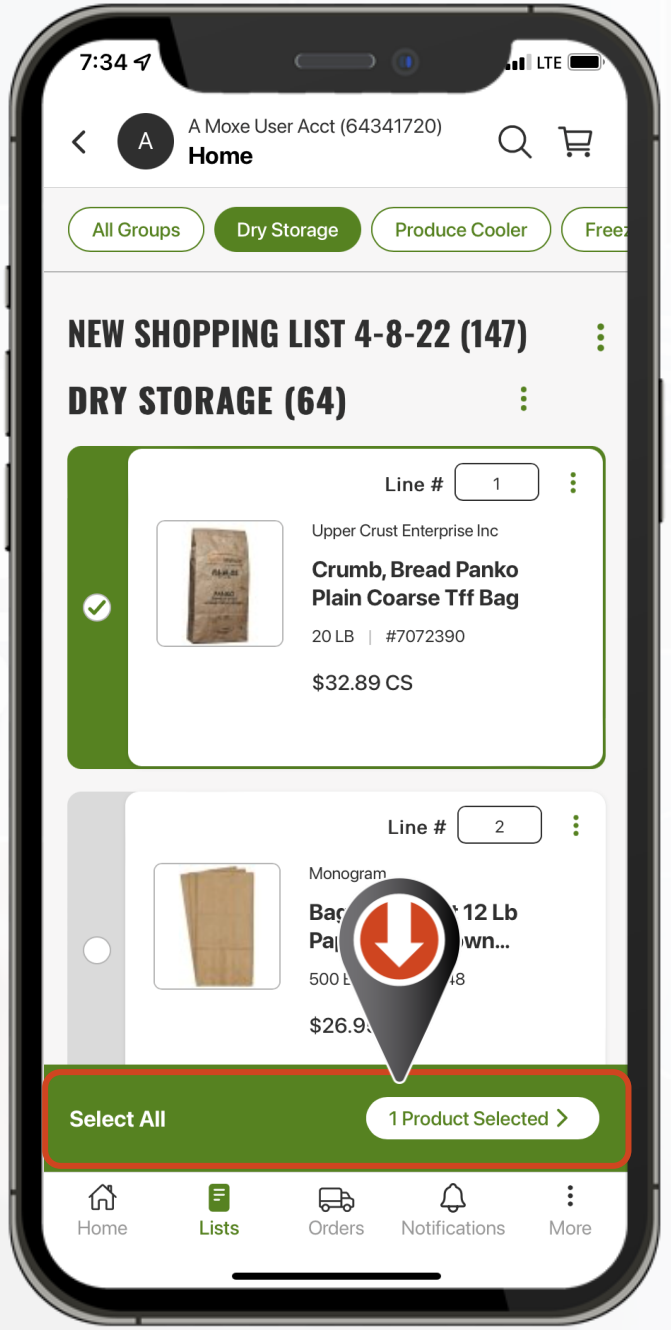
Creating Shelf to Sheet Sequence



You will see the green "Action Bar" appear at the bottom of the screen.

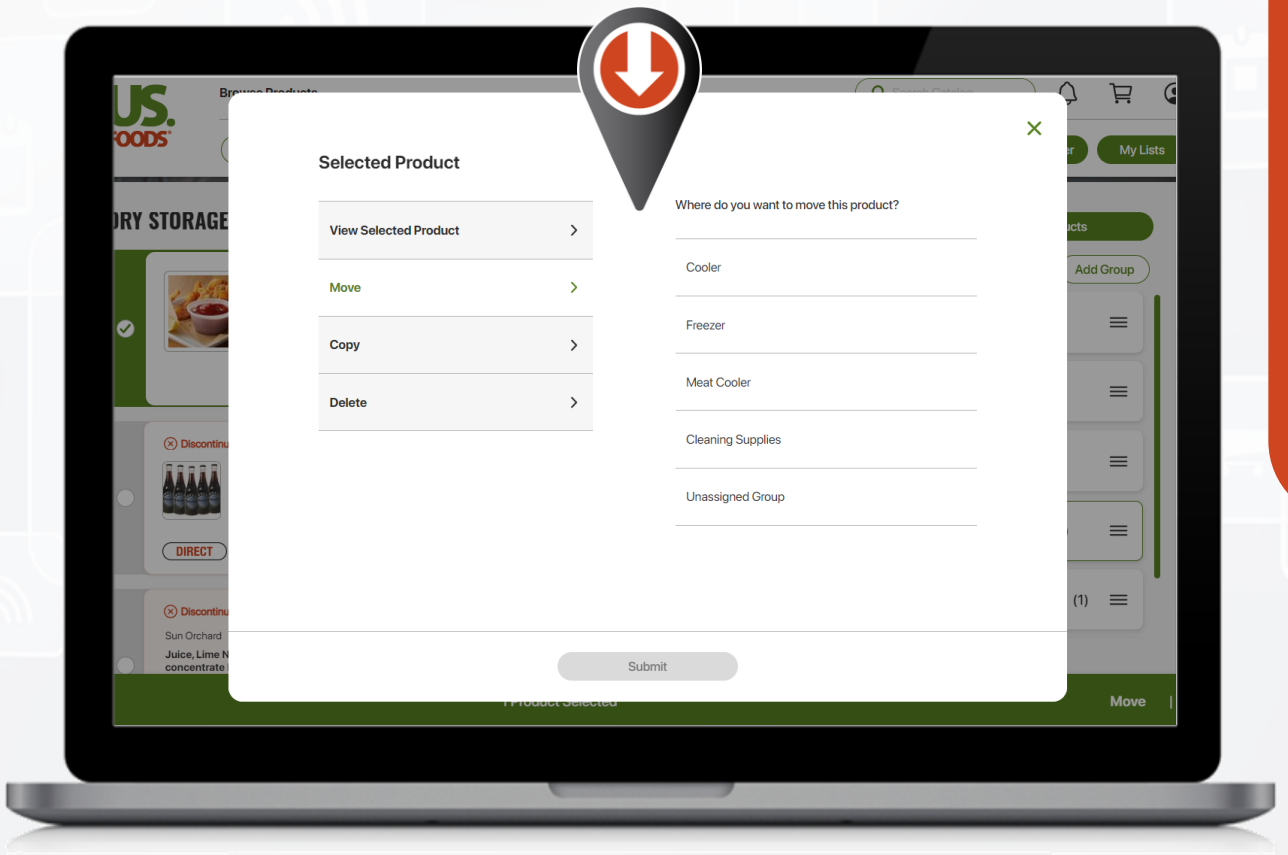
It will show the number of Products you have Selected

Select the Action Bar to open the options window.



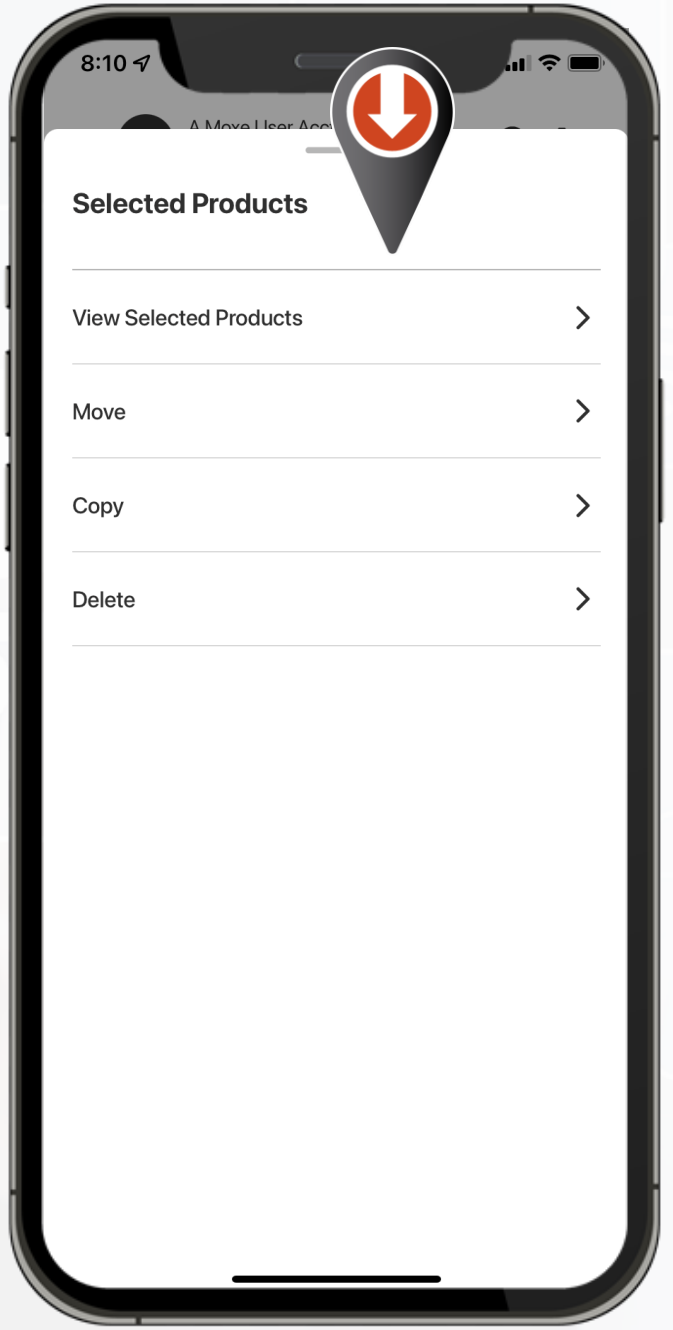
List Management

Creating Shelf to Sheet Sequence



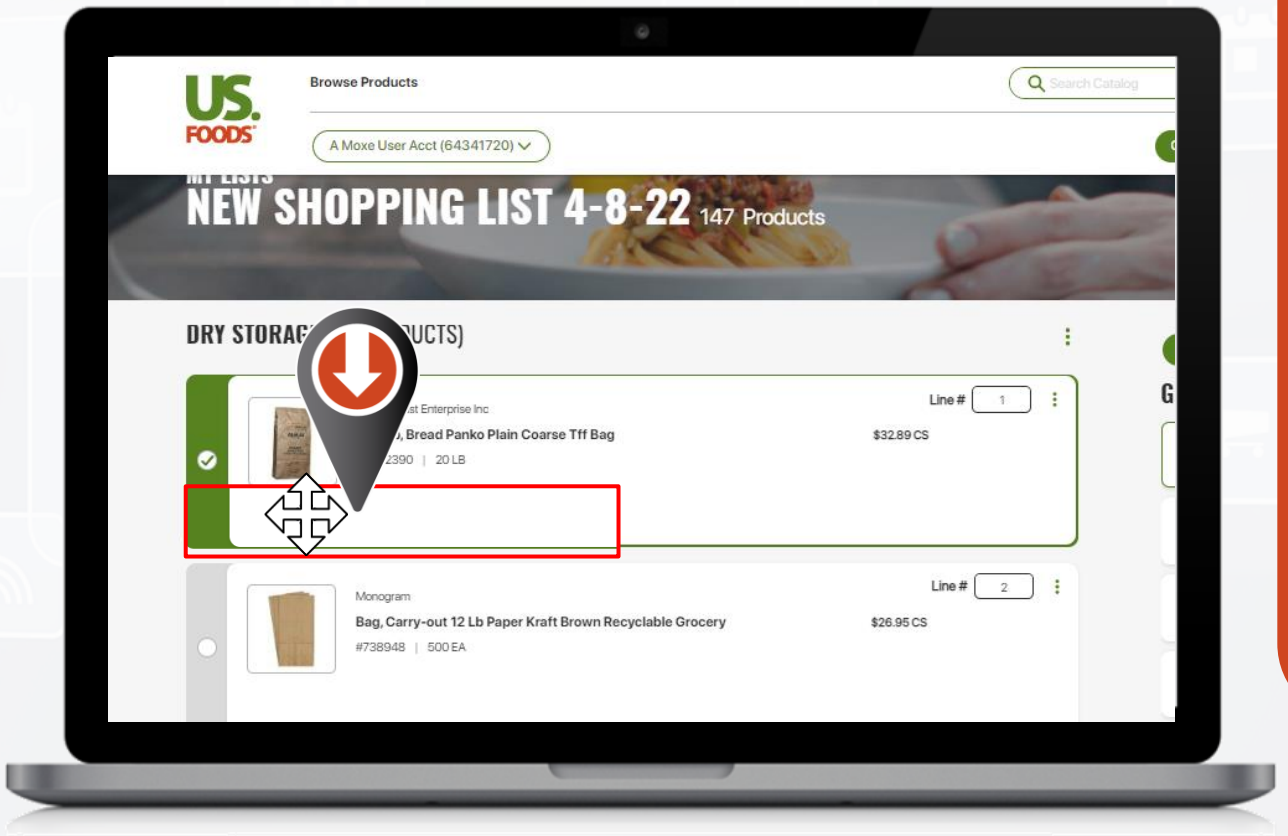
From here you will see the following options:

- **Move to another Group**
- **Copy to another Group**
- **Delete from the selected Group**



List Management

Creating Shelf to Sheet Sequence

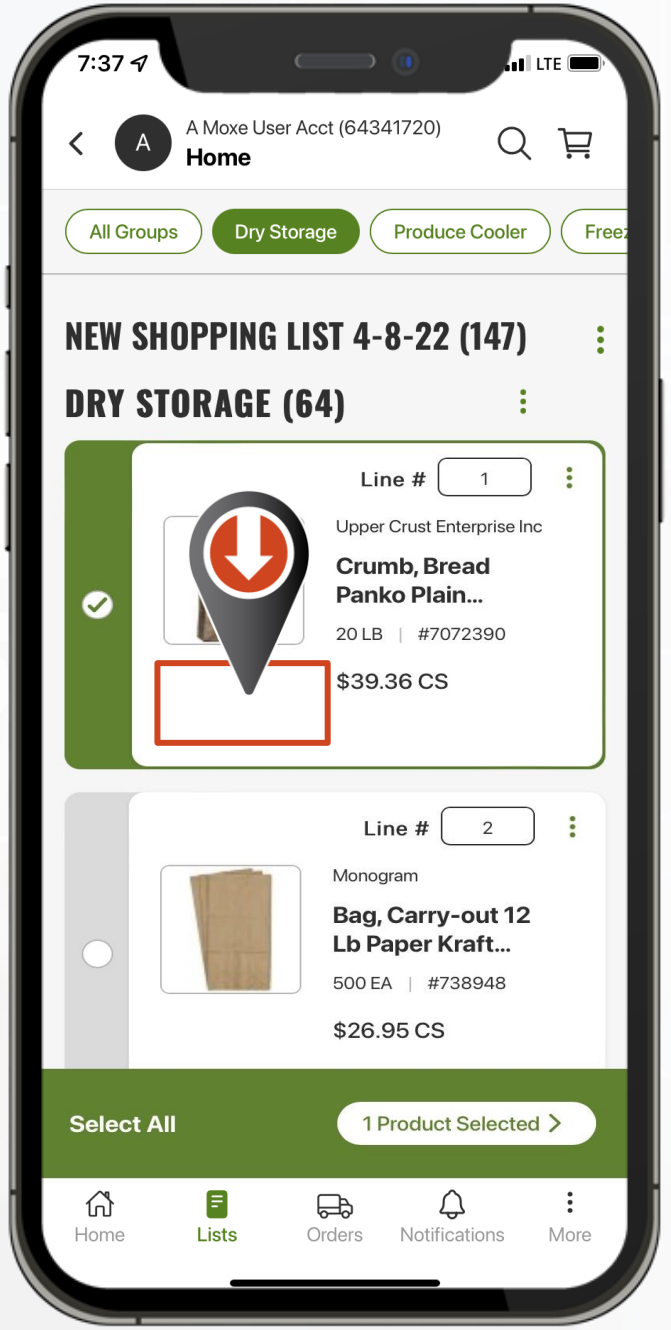


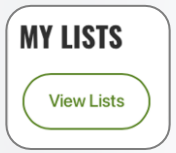
Moving Items using "Drag & Drop"

Select the product to be moved.

Selecting the area to the left and below the image & description you will see a directional chevron on desktop (click & hold)

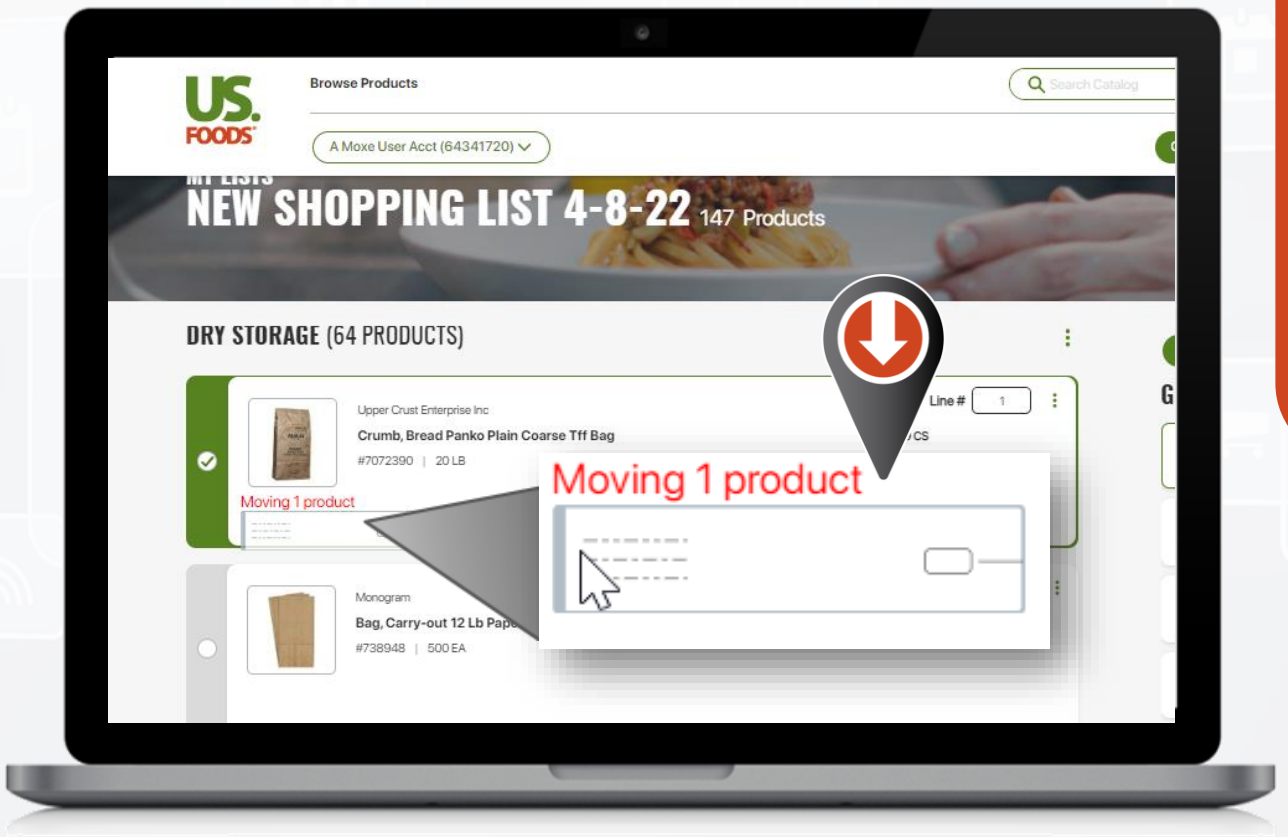
On mobile or tablet (press & hold)





List Management

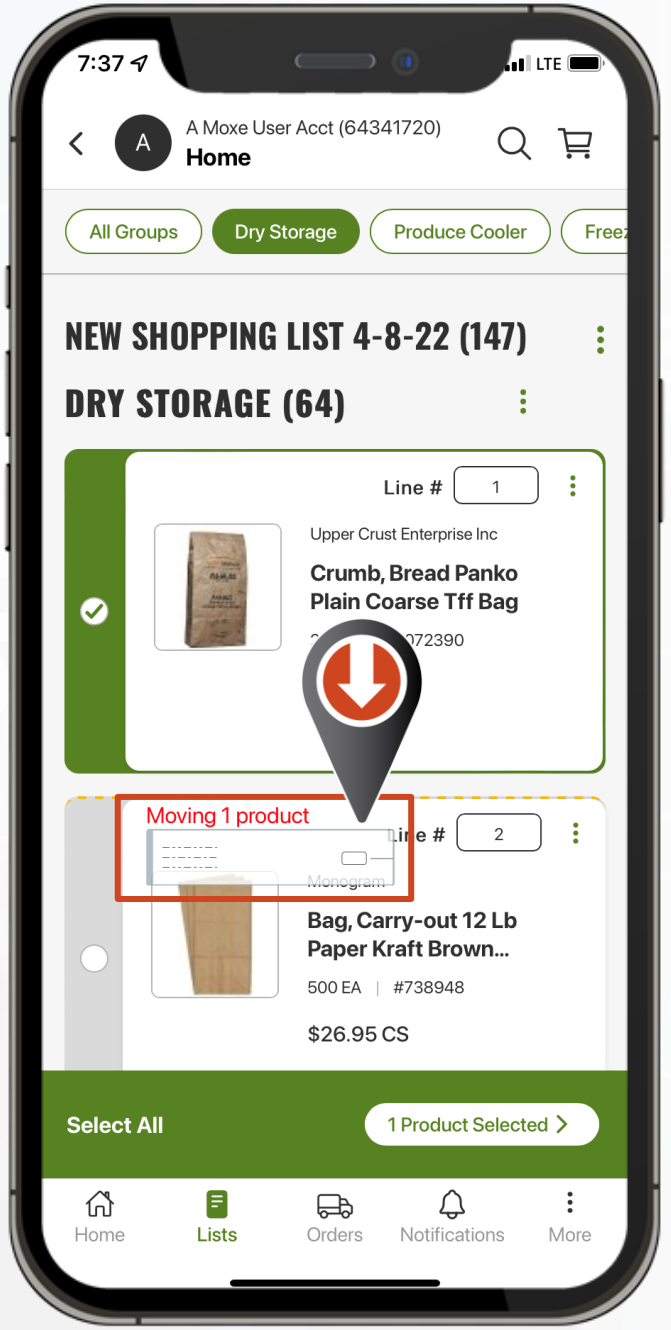
Creating Shelf to Sheet Sequence



Moving Item using "Drag & Drop"

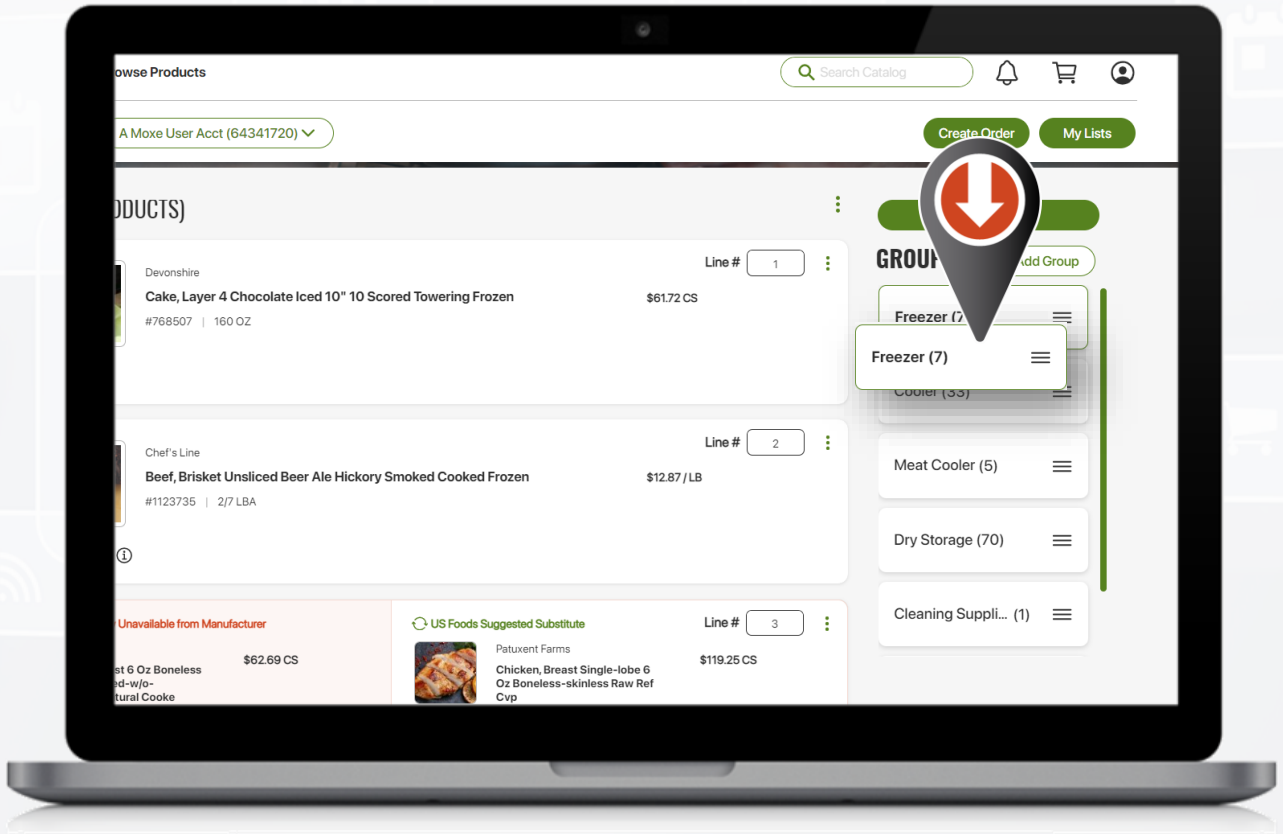
Now, begin to "Drag" the item to new position and "Drop"

You will see a small window indicating a moving product.



List Management

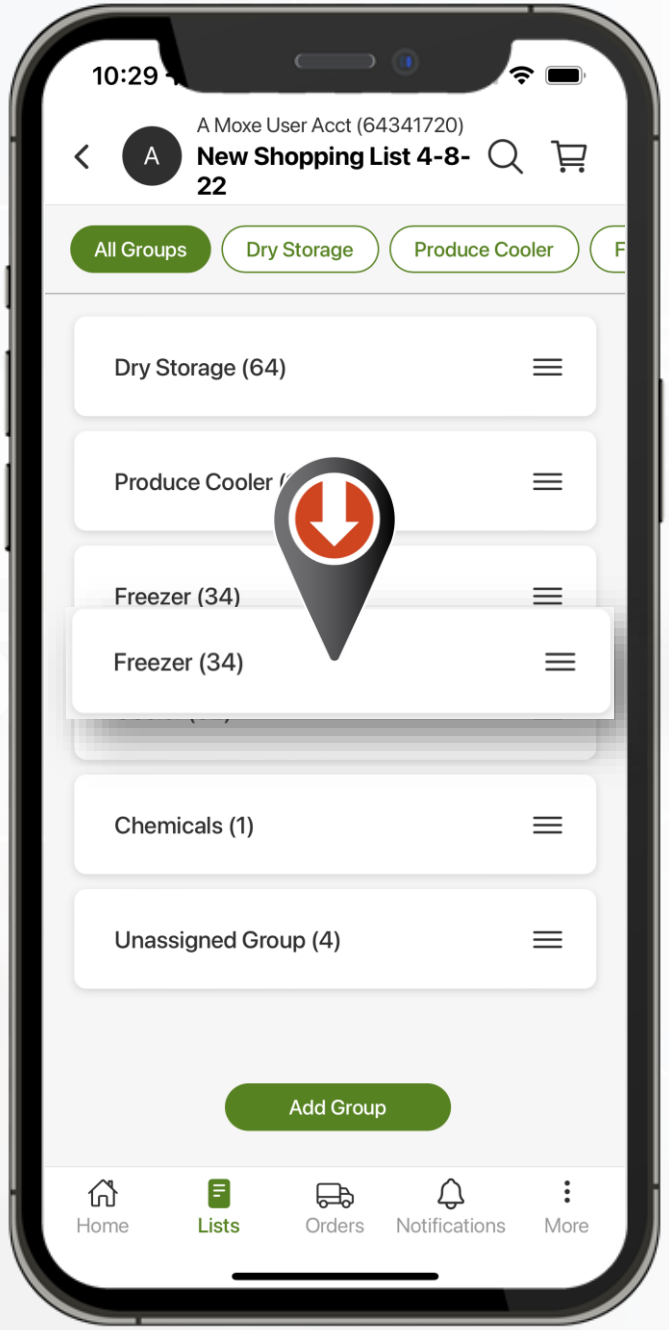
Creating Shelf to Sheet Sequence

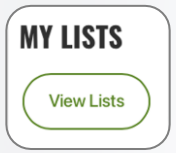


Moving Groups using "Drag & Drop"

You can also move entire groups to a new position using the drag & drop option.

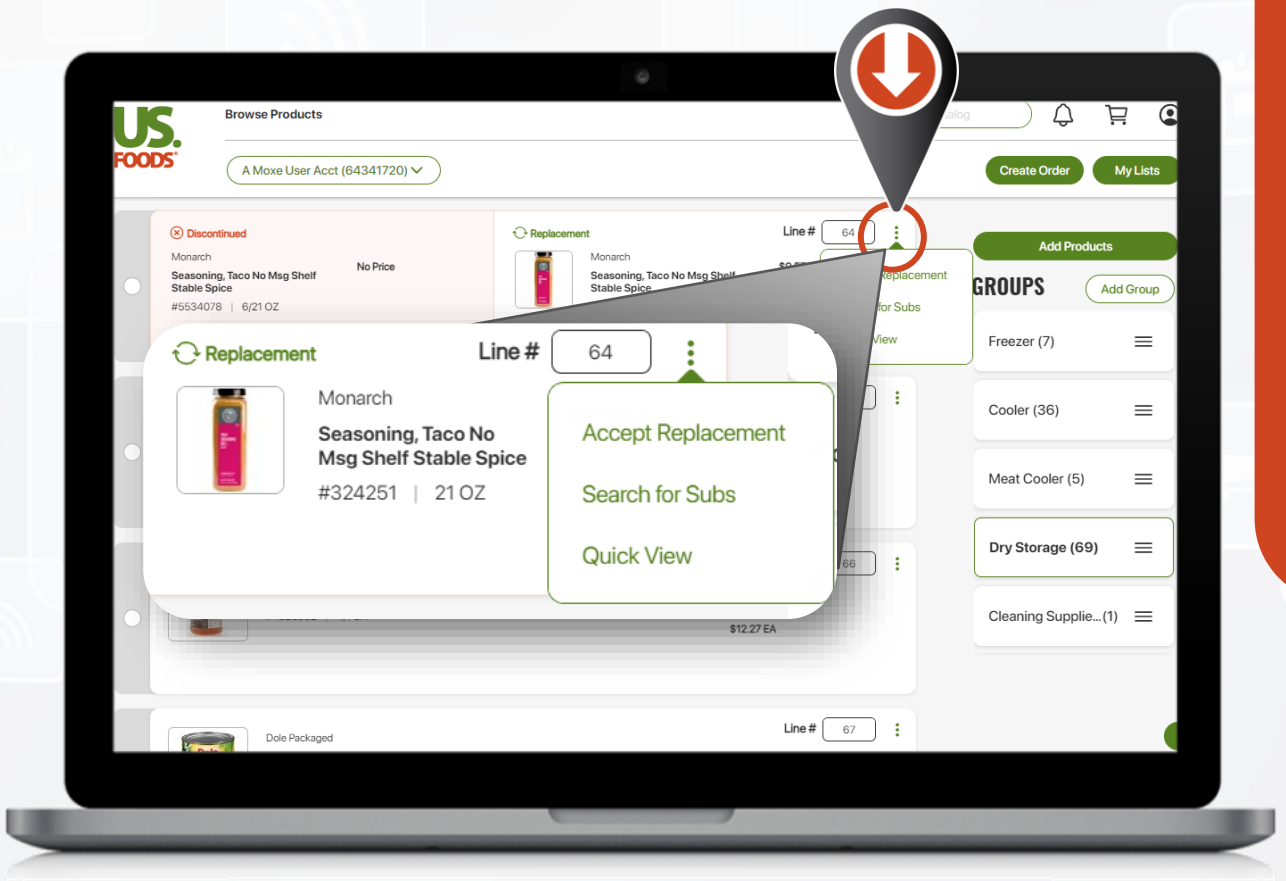
Select the group, drag it to the new position and release.





List Management

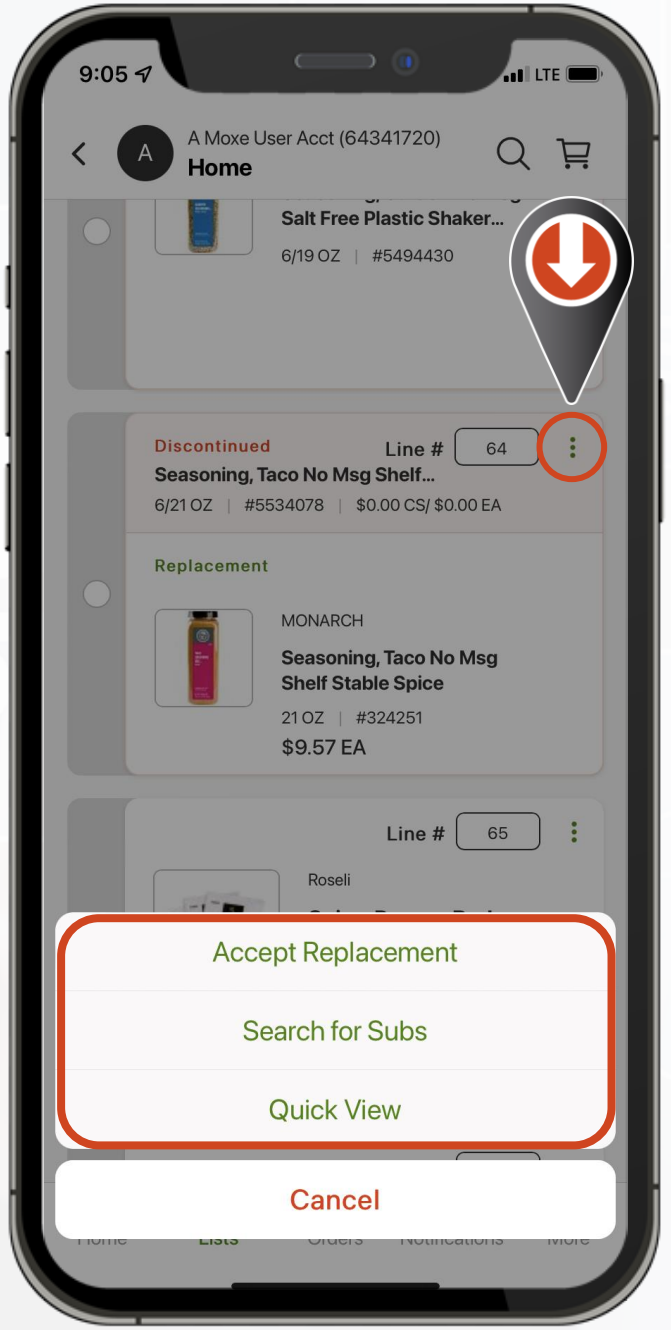
Maintaining Shopping Lists



Managing Discontinued Products

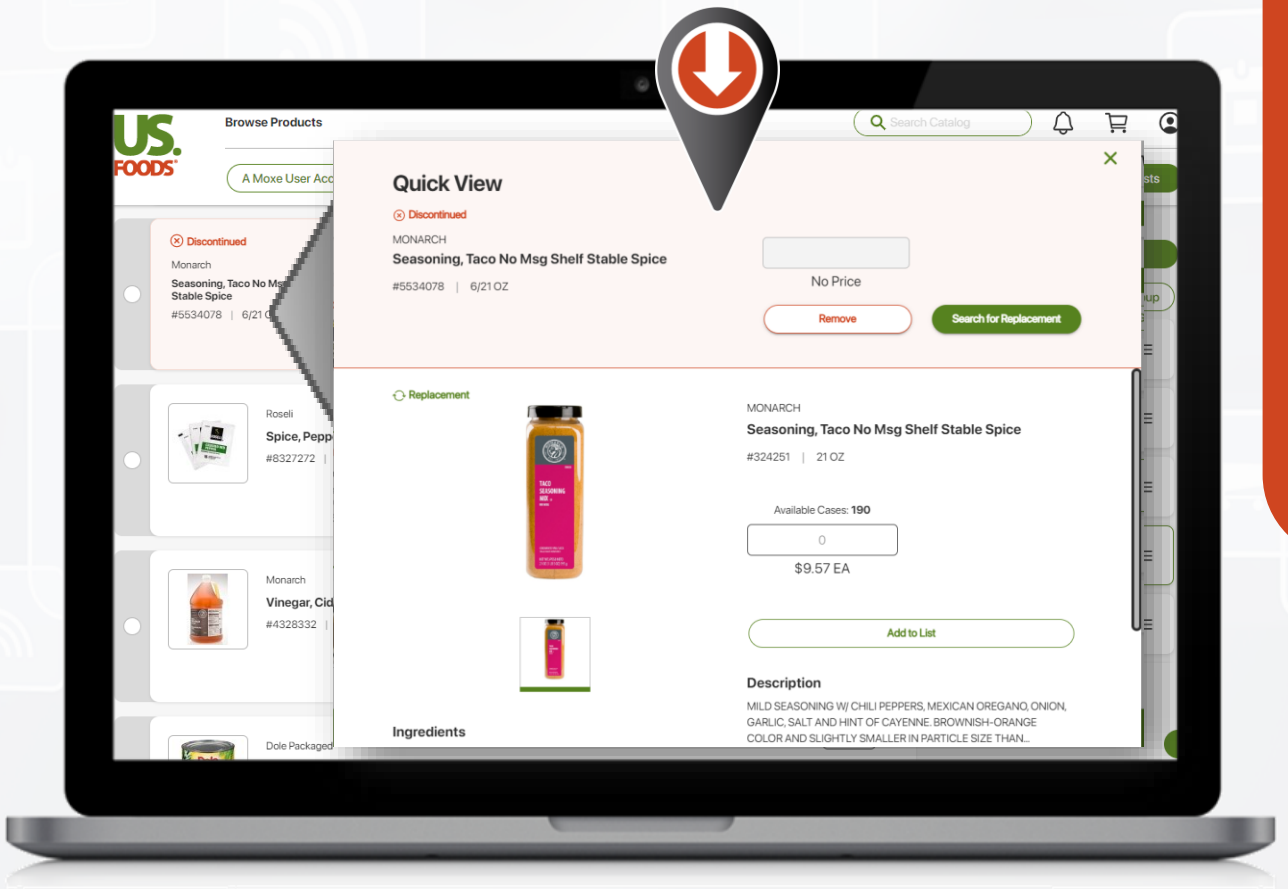
Select the 3-dot ellipsis for options:

- **Accept Replacement** (if one has been identified)
- **Search for Subs** (if another option is desired)



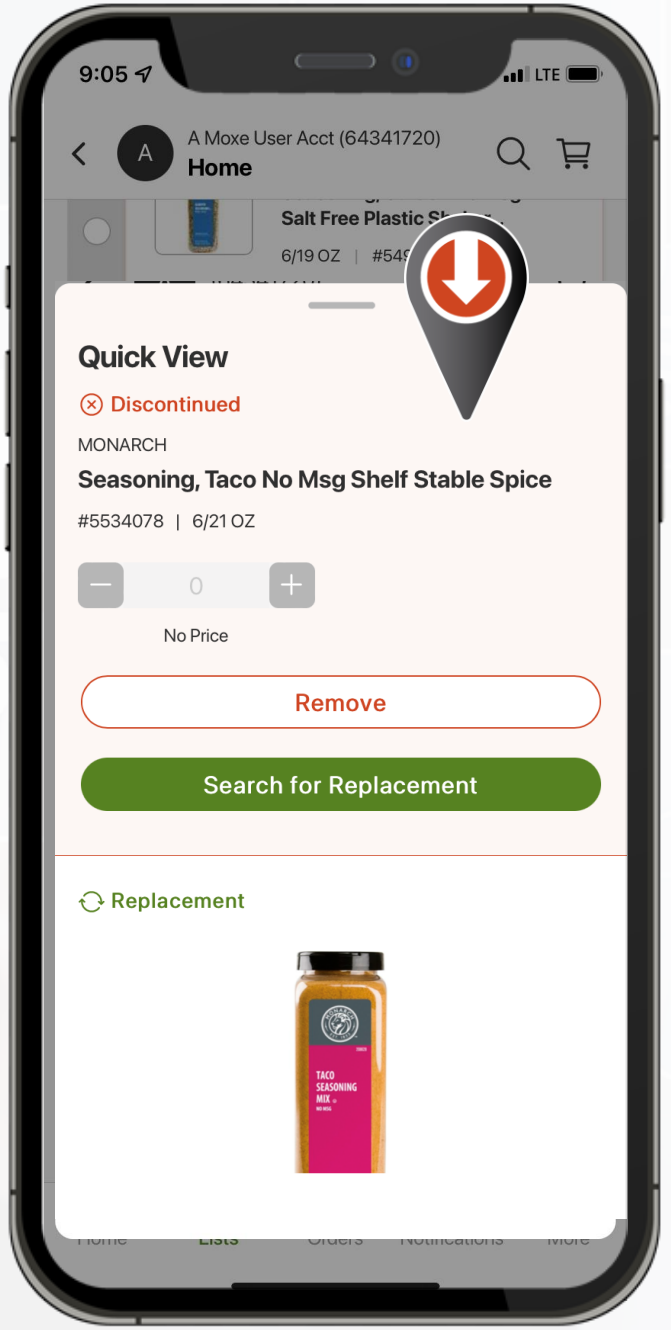
List Management

Maintaining Shopping Lists



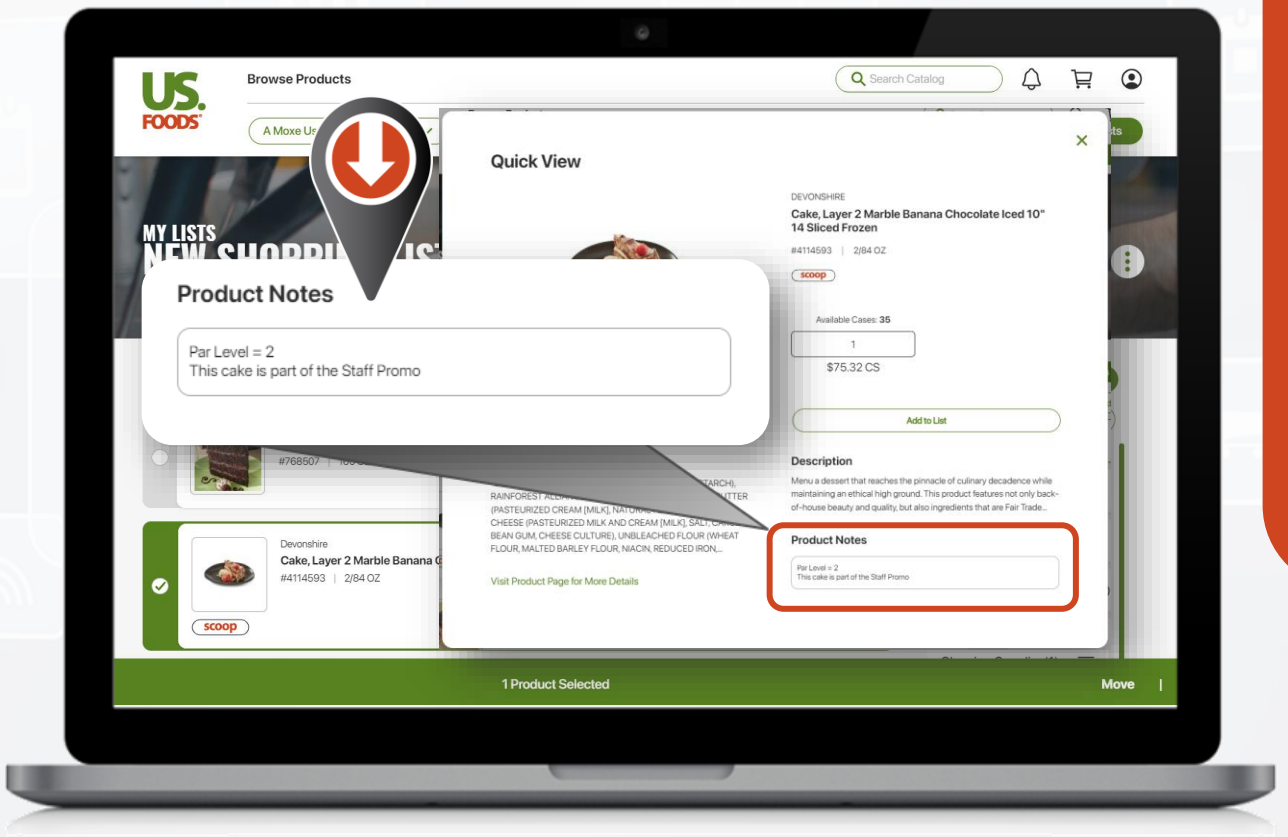
Managing Discontinued Products

- Select “Quick View” to show more details on the discontinued item and the suggested replacement.



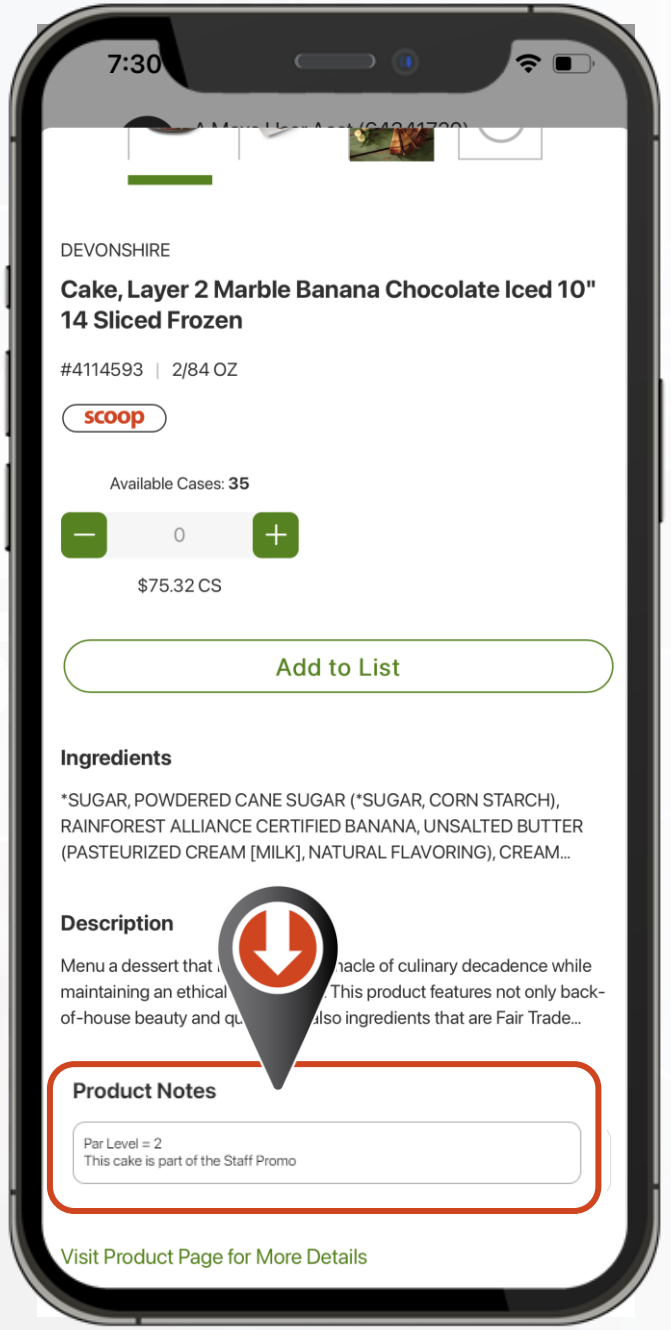
List Management

Maintaining Shopping Lists



Product Notes

On the Product Quick View windows, users can type in notes.

These are useful for entering information like Par Levels

These notes are visible on the product cards in order entry.