DSSI MOBILE

USER GUIDE

DSSI MOBILE™

USE DSSI ON YOUR MOBILE DEVICE

SINGLE-SIGN ON (SSO) USER INSTRUCTIONS

1. Navigate to your **SSO URL** on any mobile device.
2. Log in with your domain credentials.
3. Move to step 4 below.
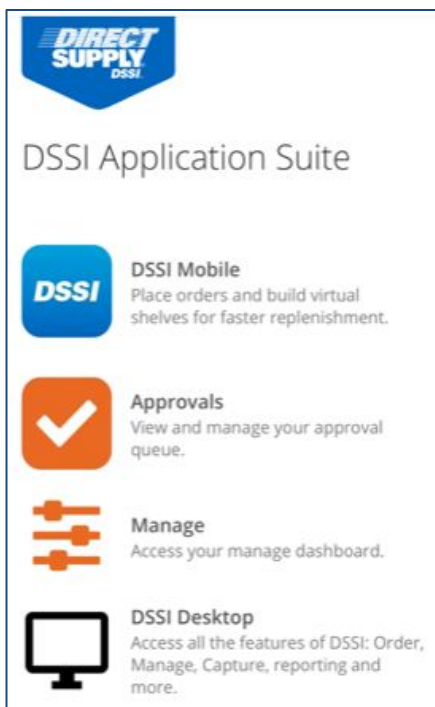
NON-SSO USER INSTRUCTIONS

1. Navigate to www.directs.com/DSSI on the web browser of any mobile device.
2. Log in with your DSSI credentials.
3. Move to step 4 below.

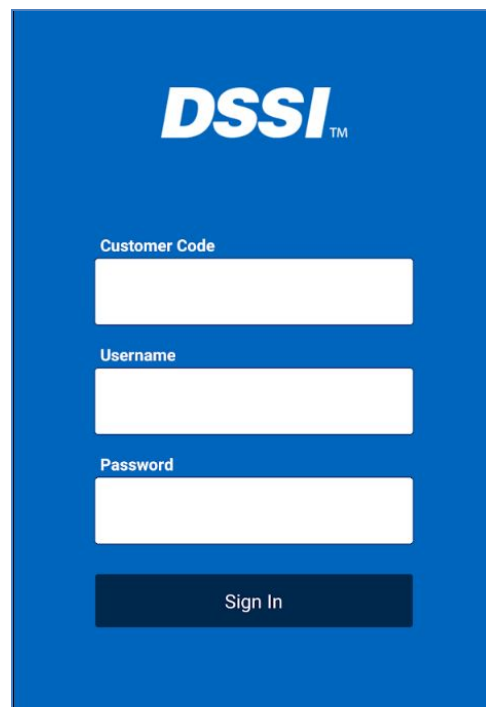## FURTHER INSTRUCTIONS

4. After successfully logging in, you'll see several options on a "DSSI Application Suite" page.
   - **DSSI Mobile:**
     - If you do <u>not</u> yet have the DSSI Mobile app installed, you'll be redirected to your App Store.
     - If you already have the DSSI Mobile app installed, you'll immediately be taken to DSSI Mobile.
   - **Approvals:**
     - If you are an Approver, you'll be taken to DSSI Mobile Approvals.
   - **Manage:**
     - If you are a DSSI Manage user, you'll be taken to the DSSI Manage modules available to you.
   - **Desktop Site:**
     - Go here if you just want to use DSSI like you do on your desktop or laptop computer.

Note: Once you have the DSSI Mobile app installed, you can go straight there! Always make sure you're using the most up-to-date version of the app. To download the latest version, go to your App Store and click "Update App".

DSSI on a Mobile Device

DSSI Mobile App

DSSI Application Suite

DSSI Mobile — Place orders and build virtual shelves for faster replenishment.

Approvals — View and manage your approval queue.

Manage — Access your manage dashboard.

DSSI Desktop — Access all the features of DSSI: Order, Manage, Capture, reporting and more.

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Customer Code

Username

Password

Sign In

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BUILD AND PLACE ORDERS ON YOUR MOBILE DEVICE

Install the **DSSI Mobile** app on your Android or Apple mobile device to quickly build an order from anywhere!

INSTALL THE APP AND LOG IN

Go to dssi.net/app on your mobile device, install the **DSSI Mobile** app, open it, enter your DSSI credentials, and **Sign In**.

BUILD AN ORDER

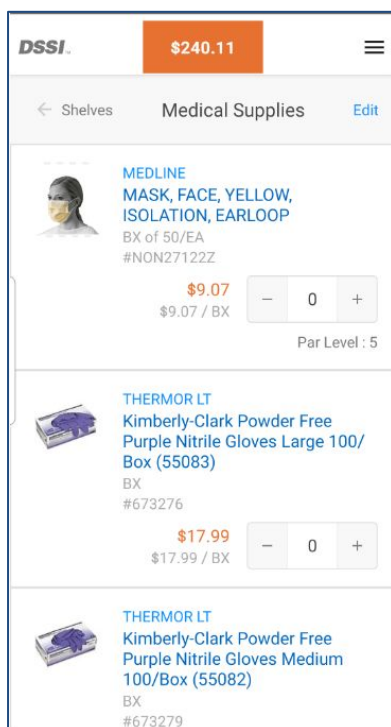Add products to your Cart using the icons in the bottom tray of DSSI Mobile.

- **SHELVES:** Organize products by their physical location to create a Shelf-to-Sheet inventory system.
- **QR SCANNER:** Scan a QR code paired to an item.
- **SEARCH:** Search by keyword or item number just like you would on DSSI. If you cannot find what you're looking for, some organizations allow the ability to order Off Order Guide products. If allowed, use the toggle to **Include Off Order Guide**.
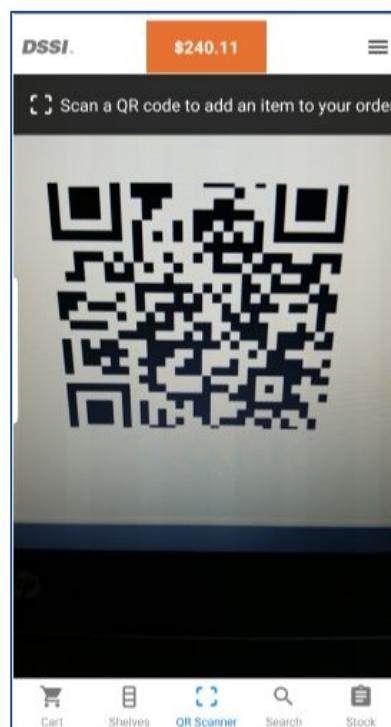
PLACE ORDER

To submit your order, click **Checkout** and follow the prompts on the screen. You can also go to your desktop and checkout from there.

Note: If you're having connectivity issues, you will notice a banner at the bottom of your screen that says "Syncing" or "Poor Connection. Needs Sync." Please wait until you see the "Sync Complete" banner before checking out to ensure that all the items on your mobile device were synced over to the Cart on your desktop.
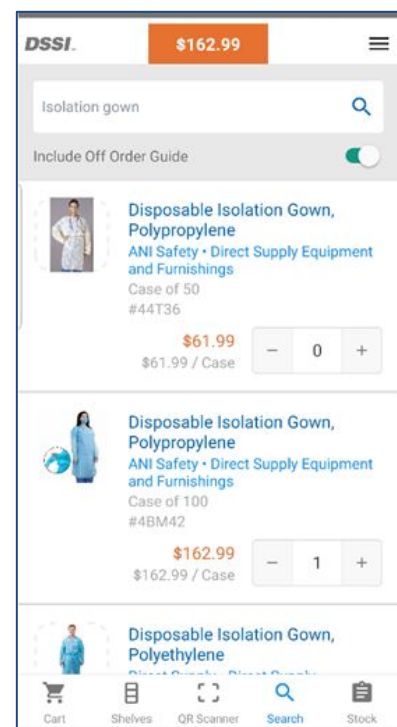
SHELVES

QR SCANNER

SEARCH

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DSSI MOBILE™
CREATE A SHELF-TO-SHEET INVENTORY SYSTEM

Use the **DSSI Mobile** app on your Android or Apple mobile device to create a Shelf-to-Sheet inventory system to make future ordering a breeze!

INSTALL THE APP AND LOG IN

Go to dssi.net/app on your mobile device, install the **DSSI Mobile** app, open it, enter your DSSI credentials, and **Sign In**.

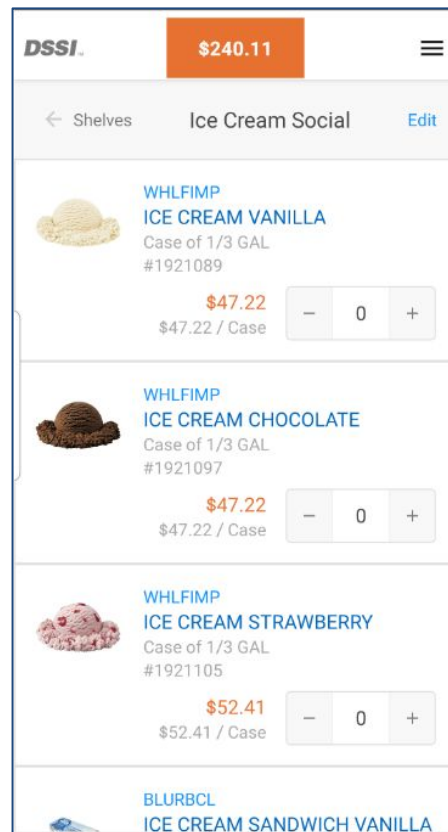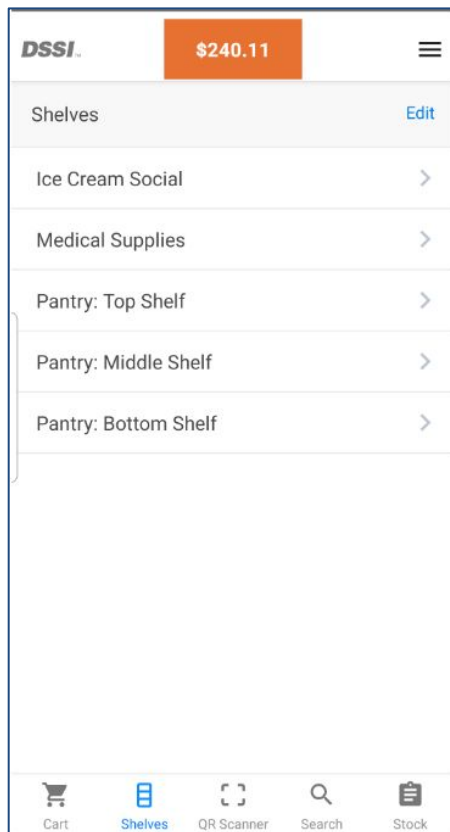## ENTER YOUR STORAGE LOCATIONS (i.e., SHELVES)

Click the **Shelves** icon and then **Edit**. Enter names for each of your storage shelves. Use the ☰ icon to move the shelves up or down and click **Done**. You only have to do this once!

CREATE YOUR INVENTORY SHEETS

Select one of the shelves and then **Edit**. Click **Add Item Via Search** to search for products by keyword or item number. Use the **Add** button to add them to the shelf. Use the ☰ icon to move the products up or down and click **Done**. Repeat this process for each shelf.

BUILD YOUR ORDER

From this point forward, when you're ready to build an order, just walk to each shelf, and use the plus (+) and minus (-) buttons in the app to add or remove quantities.

PLACE ORDER

To submit your order, click **Checkout** and follow the prompts on the screen.

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TAKING INVENTORY USING THE STOCK FEATURE

Have you wanted the ability to inventory your products? Are you looking for an easy way to track PPE stock in your locations? Well look no further; we have a solution for you! Use the **Stock** feature on DSSI Mobile to capture your stock-on-hand, whether purchased on, or off, DSSI!
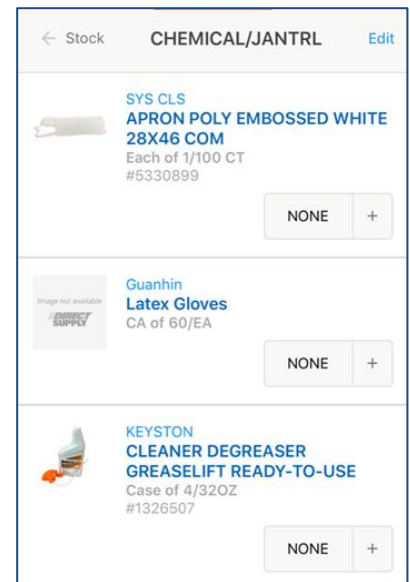
TAKING INVENTORY

To count stock-on-hand you'll need to have your mobile device with the **DSSI Mobile** app downloaded and, at least one **Shelf** set up with products on DSSI Mobile.

Why are we talking about having **Shelves** set-up, if this is all about the **Stock** feature? Remember that Shelves are meant to mirror your physical inventory locations. Once set-up, bring your DSSI Mobile device to any of your storage locations, and use the **Shelf** feature to ORDER products or the **Stock** feature to capture INVENTORY of products.

Follow these steps to track your inventory in DSSI:

1. Open the **DSSI Mobile** app on your mobile device.
2. Navigate to the **Stock** option in the bottom tray of DSSI Mobile.
3. Choose the shelf you're physically in front of in your storage area and adjust the quantity you have on-hand by using the "+" or "-" buttons. (Whole units only.) The system will automatically capture the date / time you entered it. Note: It's important to hit the "None" button if there are none on the shelf. Otherwise the system won't know if there were 0 on hand or if you just forgot to count something.

SHELVES (ORDERING) VS. STOCK (INVENTORY)

As mentioned, shelves are shared across ORDERING (the **Shelves** feature) and INVENTORY (the **Stock** feature) - a change to one reflects a change in the other.

OFF-SYSTEM PRODUCTS

When editing shelves for INVENTORY purposes (i.e., on the **Stock** page), there is a new option to add an "off-system" product. This is in direct response to the COVID crisis and the need to inventory products obtained outside of DSSI - direct from manufacturers or donated. You'll be able to see those products on the **Shelves** page, but you won't be able to order them.

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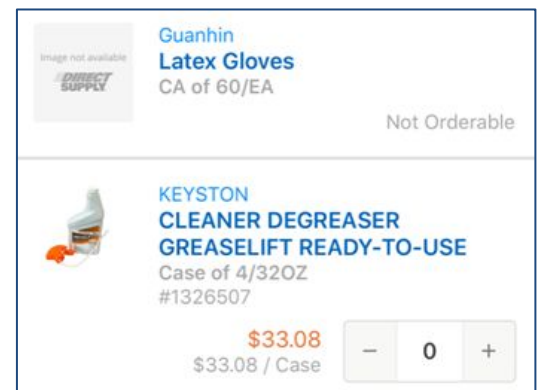## PAIR QR CODES TO PRODUCTS, THEN SCAN TO ORDER

Use the **DSSI Mobile** app on your Android or Apple mobile device in conjunction with QR code labels to create an organized storage and inventory system to make future ordering a breeze!

CREATE YOUR LABELING AND SHELVING SYSTEM

- Write the *generic* name of a product (e.g., "chocolate cake mix" or "olive oil") on each QR code label – you never know when you might change brands!
- Adhere each QR code label* to the appropriate product location, ensuring the QR code label will not fall off, get covered up, or move around.

The recommended method is to use plastic label holders on wire racks.
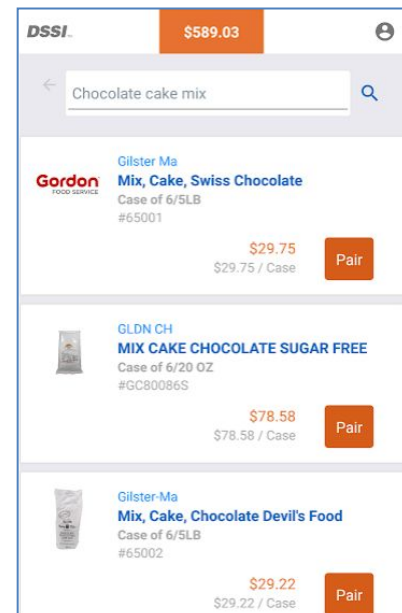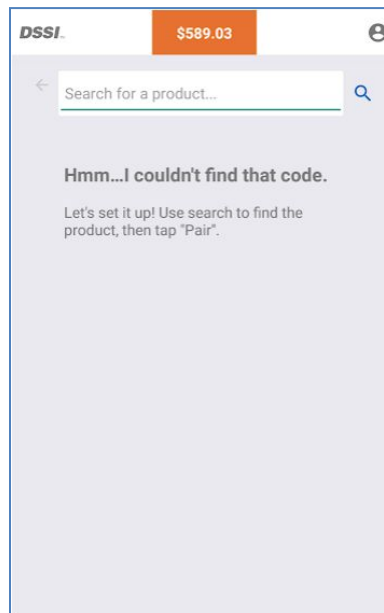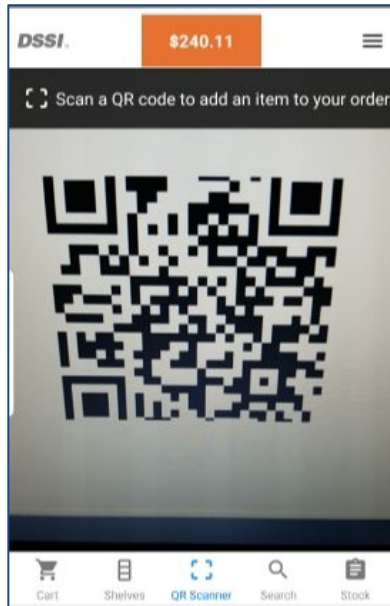
INSTALL THE APP AND LOG IN

Go to dssi.net/app on your mobile device, install the **DSSI Mobile** app, open it, enter your DSSI credentials, and **Sign In**.

PAIR THE QR CODES TO THE PRODUCTS

With the **DSSI Mobile** app open, select the **QR Scanner** icon and then follow this process to pair each product:

- Scan a QR code. After a second, it will say, "Hmm…I couldn't find that code. Let's set it up!"
- Use the search box to search for the appropriate product. (e.g., your "chocolate cake mix" or olive oil")
- Tap **Pair** next to the product to tie it to the QR code. From now on, scanning that QR code will bring up that product!

Need to reassign a QR code? Just throw it away and use a new one!

BUILD YOUR ORDER

From this point forward, when you're ready to build an order, just walk to each location, scan the QR codes of the products you need, and use the plus (+) and minus (-) buttons in the app to add or remove quantities.

PLACE ORDER

To submit your order, click **Checkout** and follow the prompts on the screen.

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END