1. A. Create your user account

- Visit http://setup.refss.com.au/Account/Register
- Fill in all fields with your details
- Read and Agree to Terms, and press "Submit"
  - ❖ A verification email will be sent
- Check your email and verify your account

B. Add a site to your Master Login Account

- After verifying, log in to http://setup.refss.com.au
- Fill in your site/store info - select "Multi site" if this 1st site is part of Multi Store Operation (MSO). Otherwise select Single site. Click save.

2. Configure Site

A. Select Departments in your store, click Save

B. Select Bundle Preference, click Save

C. Select the e-Log sheets you would like to use, click Save

D. Insert Key Management Team (enter N/A where not applicable) – this will populate your Food Safety Plan. Click Save

E. Review the summary of your Site configuration, click Continue
  - ❖ Auto Email will be sent confirming site and purchase details

➢ **You will receive a customised Food Safety Plan within 7 days**

▶ For a video guide to set up your site, visit: https://youtu.be/Nduq65s2hsc

3. Populate store lists - Select your Store from the red "My Sites" dropdown

- From the left menu under "Lists", select the list you wish to add items to and click the "Add" button in the top right corner.

A. **Staff** – This will populate the "Staff" field on all log sheets (Bulk upload available)

B. **Cooked Products and Hot Food Storage Units -** This will populate all of the "Products" you cook and monitor temperature on your **Chicken and Hot Foods Cooking Temperature Checks** log sheet

C. **Equipment -** When adding Equipment items, select the eLog Sheet Group as "StoreWide" to ensure similar items are grouped to one elog sheet (e.g. all Scales grouped into one Storewide Daily Scales Check log sheet). If a department is selected, a separate department elog sheet will be created.
  - ❖ Scales – This will populate your "Scale" fields on your **Daily Scales Check** log sheet
  - ❖ Coolroom & Refrigeration – This will populate all of your "Temp Check" fields on your **Refrigeration Temperature Check** sheets
  - ❖ Temp Guns & Probes – This will populate your "Calibration Equipment" on your weekly Thermometer Calibration log sheets

D. **Suppliers** – This will populate the "Supplier" field and "Transport Company" field on your **Goods Inwards** log sheet (Bulk upload available)

> **NEW:** Bulk upload - available for **Staff** and **Supplier** lists. Populate the Excel template (click the 1st option in the Bulk Actions dropdown)

**Note:** All lists should be populated with at least 1 added item.

▶ For a video guide to populate your lists, visit: https://youtu.be/sRV7k4gLkBI

REFSS
Retailers Electronic Food & Safety Systems

4. **Add a Device (Tablet)** - Select "Devices" from the Actions dropdown button or the "Devices" option in the "Lists" left menu

   Device Activation
   - Click on "Devices", then click the "Add" button in the top right corner
   - Enter a Device name (make it simple, e.g. Device1) and tick departments you want to assign to the device. Click "Save and Publish"

     ❖ An email will be sent with device set up details
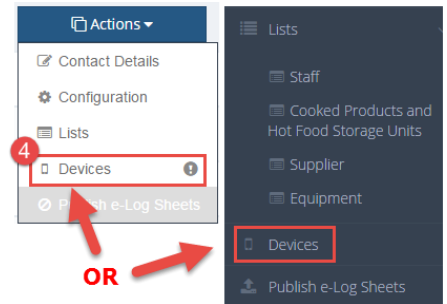
5. **Build eLog Sheets**
   - After Saving your device, click "Publish e-log sheets"
   - Tick "Select All" and click "Publish" to build your e-log sheets and populate them with your list information. This may take a few minutes

6. **Application Installation on the device**
   - Purchase an Android or Apple Device (Configured via IGL or from your local store)
   - Download the Icon Global Link App ("Icon Global Link Forms") from your App Store
   - Using the Device email details, insert the Device Name and Org Key in the IGL application.

   IMPORTANT: The device name must be typed in EXACTLY the same as is shown in the "Device Setup" email you received (see image to the right). If entered incorrectly, the device approval may be delayed, or in some cases, rejected.

   - Call IGL support - **(03) 9001 1568** to fast-track device approval
   - Once approved, you will see log sheets on your device and can start submitting data from the e-log sheets

7. **View Data Capture (log sheet) submissions**
   - In the left menu, click "Detailed Reporting"
     ❖ You will be transported to the "Detailed Reporting Dashboard"

   - On the left navigation, you can view log sheet submissions under the "Data Capture" e-log sheet name.

   - To toggle back to the Setup Wizard, click the "Wizard" button in the top-right corner
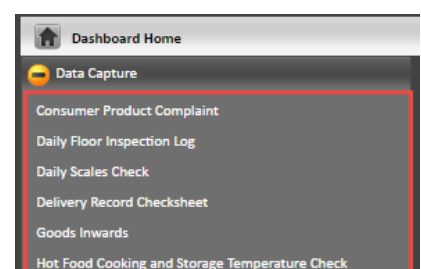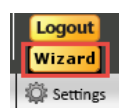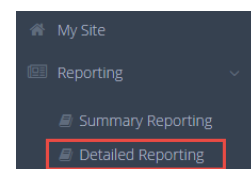
8. NEW: Set up New e-Log Scheduler Intervals

- In the left menu, click "e-Log Scheduler", then click the "Add" button in the top right corner

  A. Select the e-log sheet(s) to you want to apply the Interval to by clicking or typing in the drop down box
     - ❖ To apply the same interval to multiple e-logs, hold "CTRL" and click each e-log required
  B. Select the frequency you want the interval to occur - daily/weekly/monthly
     - ❖ Multiple intervals can be set for Daily/Weekly.
     - ❖ Only 1 interval is allowed for Monthly.
  C. Select the interval start and end time
     - ❖ Use "Quick options" to set predefined times
  D. By Default, the interval is set to begin checking submissions from the day after you set it – to change the start date, or to disable it, set the "Enable type" to your choice
  E. Click Save to set the Interval
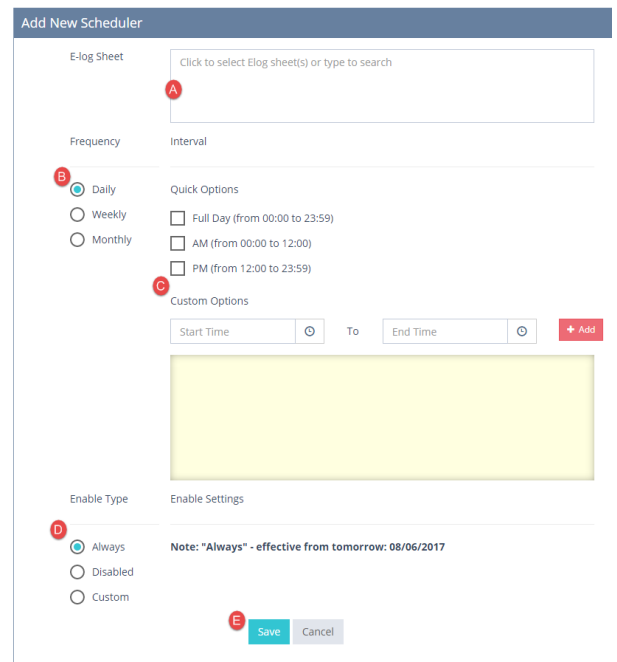
9. NEW: Set up New Notification Scheduler

- In the left menu, click "Notification Scheduler", then click the "Add" button in the top right corner

  A. Select the e-log sheet(s) to you want to receive reporting from (can be one or more/all)
     - ❖ To select multiple e-logs, hold "CTRL" and click each e-log required
  B. Select the frequency you want the email to be sent - daily/weekly/monthly
     - ❖ Weekly/Monthly – specify the days the email is sent
  C. Select the interval start and end time
     - ❖ Use "Quick options" to set predefined times
  D. By Default, the interval is set to begin checking submissions from the day after you set it – to change the start date, or to disable it, set the "Enable type" to your choice
  E. Click Save to set the Notifcation
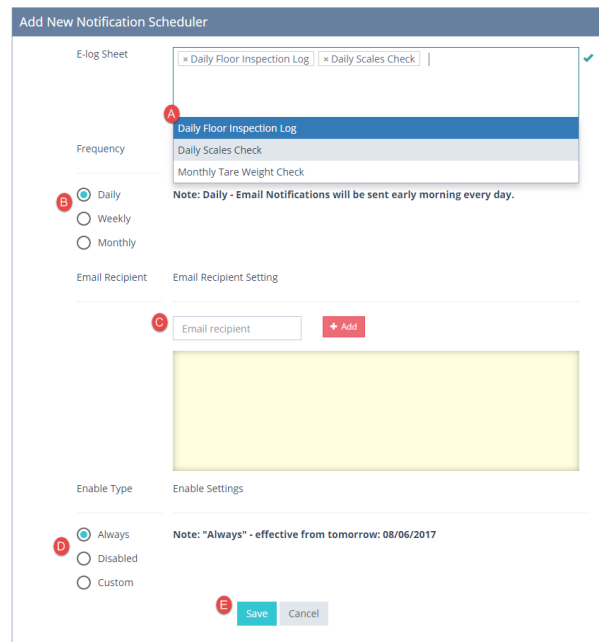
10. NEW: View an Up-To-Date Summary of your Submissions with Summary Reporting

- In the left menu, click "Summary Reporting" to view your e-log submission activity in Real-Time