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Operations Staff Track

Navigating the Platform

Logging In

To get started with ReRoute AI, open your browser and navigate to the login page provided by your manager. Enter your username and password, then click **Sign In**. If your account has multi-factor authentication enabled, you will see an MFA challenge screen before reaching the main dashboard.

On your first login you may be prompted to change a temporary password. Choose something strong with at least 8 characters, mixing uppercase, lowercase, numbers, and special characters.

The Briefing Page

After signing in you land on the **Briefing** page. This is your AI-powered command center and the starting point for every shift. The page has three main areas:

- **Left Sidebar** – your navigation menu with links to Briefing, Inventory, Products, Transfers, Distributors, Orders, Analytics, Reports, Locations, Users, and Settings.
- **Center Chat Area** – the AI assistant where you can ask questions in plain language and get instant answers about your inventory, sustainability, and operations.
- **Right Panel** – an Upcoming Events calendar and Quick Action buttons such as Daily Briefing, Low Stock, Trends, Sustainability, Forecast, and Scope 3 Report.

Sidebar Navigation

The left sidebar is your primary way to move around the platform. Each item takes you to a dedicated section:

Item	What It Does
Briefing	AI command center with chat and quick actions
Inventory	View and manage stock levels at each location
Products	Browse the product catalog and sustainability scores
Transfers	Create and track inventory movements between locations
Orders	Manage purchase orders from distributors
Reports	Generate sustainability, usage, and movement reports

The currently active page is highlighted in teal so you always know where you are.

Switching Locations

If your property has multiple locations (for example, Storage Room, Kitchen Storage, and Pool Bar), you can switch between them using the **Location** dropdown that appears on pages like Inventory. This lets you quickly check stock at any area without leaving the page.

> **Try it yourself**
>
> Log in and click through each sidebar item to familiarize yourself with the layout. Pay attention to the teal highlight that follows you as you navigate. Then switch between two different locations on the Inventory page to see how the stock view changes.

Inventory Basics

Viewing Stock Levels

Click **Inventory** in the sidebar to see all products at your current location. The page opens on the **Stock** tab, which shows product cards in a grid or list layout. Each card displays the product name, UPC code, brand, sustainability score (color-coded), and available quantity.

At the top of the page you will see summary cards showing:

- **Total Items** – how many distinct products are stocked at this location.
- **Low Stock Alerts** – how many items have dropped below their alert threshold.
- **Location** – a dropdown to switch between your property's locations.

Switching Locations

Use the **Location** dropdown to view inventory at different areas. For example, a hotel property might have a Storage Room with bulk supplies, a Kitchen Storage area, an Alcohol Cage for spirits, and front-of-house bars. Each location maintains its own stock counts, so switching locations gives you a completely different inventory view.

Understanding Current, Available, and Reserved Quantities

This is one of the most important concepts in the platform:

- **Current Quantity** – the total physical units at a location.
- **Reserved Quantity** – units that are part of a pending transfer and cannot be used elsewhere.
- **Available Quantity** – what you can actually use right now, calculated as `Current Quantity - Reserved Quantity`.

For example, if you have 20 bottles of sparkling water and 5 are reserved for a transfer to the Pool Bar, your available quantity is 15. Those 5 bottles are still physically on the shelf, but the system prevents them from being double-booked.

Low Stock Alerts

When a product's **available quantity** (not current quantity) drops below the configured threshold, the platform triggers a low stock alert. Alerts are deduplicated over a 24-hour window so you are not bombarded with repeated notifications for the same item.

Editing Quantities

If you need to adjust stock after a delivery or a physical count, click the **settings gear icon** on a product card. Update the quantity and click **Save**. The change is recorded immediately with a timestamp and your user ID in the audit trail, so there is always a record of who changed what and when.

> **Try it yourself**
>
> Navigate to the Inventory page, switch to two different locations, and compare the stock levels. Find a product and note its available quantity versus its current quantity. If they differ, a transfer is pending for that item.

Transfers & NFC Scanning

What Is a Transfer?

A transfer moves inventory from one location to another within your property. For example, you might transfer a case of sparkling water from the Storage Room to the Pool Bar. Transfers ensure that both locations' stock counts stay accurate automatically.

Creating a Transfer

Click **Transfers** in the sidebar, then start a new transfer. You will select:

1. **Source location** – where the products are coming from.
2. **Destination location** – where the products are going.
3. **Products and quantities** – which items and how many units to move.

Once you submit the transfer, the selected quantities are **reserved** at the source location. They are still physically there, but the system marks them as unavailable so no one else can transfer or use them.

Transfer Stages

Every transfer moves through four stages in order:

1. **Initiated** – the transfer has been created and products are reserved.
2. **In Transit** – someone has confirmed pickup at the source with an NFC scan.
3. **Received** – the recipient has confirmed delivery at the destination with an NFC scan.
4. **Completed** – inventory counts are updated at both locations automatically.

You can track the status of any transfer from the Transfers page.

NFC Scanning

NFC (Near Field Communication) tags are attached to locations that require verified handoffs, such as the Alcohol Cage, Lobby Bar, and Pool Bar. When you arrive at a location to pick up or deliver items, you scan the NFC tag with your mobile device to confirm the action.

- **Pickup scan** – confirms you have collected the items from the source location. The transfer moves to "In Transit."
- **Delivery scan** – confirms you have delivered the items to the destination. The transfer moves to "Received" and then "Completed."

This two-scan verification prevents errors and creates an auditable chain of custody for every movement.

What Happens If a Transfer Is Cancelled?

If a transfer is cancelled before completion, the reserved quantities are released back to the source location's available stock. No inventory counts change, and the cancellation is recorded in the audit trail.

> **Try it yourself**
>
> Go to the Transfers page and review any existing transfers. Note the status of each one. If you have access to an NFC-enabled location, practice the pickup and delivery scanning workflow with a test transfer.

Your Daily Workflow

Building Good Habits

Getting the most out of ReRoute AI comes down to a few simple habits built into your daily routine. You do not need to spend hours in the platform. A few minutes at key moments throughout the day keeps everything running smoothly.

Morning: Start with the Daily Briefing

At the beginning of every shift, open the **Briefing** page and click the **Daily Briefing** quick action button. This takes about two minutes and gives you a complete picture of:

- **Low stock alerts** – products that need attention before they run out.
- **Pending transfers** – items on their way to or from your location.
- **Sustainability highlights** – any score changes or recommendations.
- **Forecast insights** – what the AI predicts you will need today.

Think of the Daily Briefing as your morning checklist. It surfaces the most important information so you know exactly where to focus.

Mid-Day: Check Notifications

Around midday, take a quick look at your notifications. The platform sends alerts when:

- A transfer arrives at your location and needs to be received.
- Stock drops below a threshold and needs restocking.
- A scheduled report is ready for download.

Staying on top of notifications means you catch issues before they become problems. A two-minute check can prevent a stockout during the dinner rush.

End of Day: Quick Scan

Before closing out your shift, do a quick walkthrough:

1. **Check the Inventory page** for any discrepancies between what you see on the shelf and what the system shows.
2. **Complete any open transfers** that were initiated during the day. If items were picked up but not yet delivered, follow up.
3. **Note anything unusual** for the next shift – the AI chat is a great place to log observations like "Pool Bar ran through limes faster than expected today."

Weekly Tasks

Once a week, spend a few extra minutes on:

- **Review the Trends quick action** to see usage patterns over the past 7 days.
- **Check par levels** to make sure your recommended stock quantities still match actual demand.
- **Look at Swap Suggestions** on the Products page to see if there are easy sustainability wins you have not acted on yet.

  Try it yourself

  Start your next shift by clicking Daily Briefing on the Briefing page. Read through the summary and identify one action item to address. At the end of your shift, check the Inventory page for your primary location and confirm the counts look right.