

Web Platform Simple Steps

**Accessing and Maintaining a Vending
Database from the Web Portal**

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Accessing and Maintaining a Vending Database from the Web Portal

MSC offers customer access to vending inventory data anywhere, anytime via the internet 24 hours a day 7 days a week.

Site Access

Step 1: Navigate Your Browser to the MSC Web Portal URL <https://vending.mscdirect.com>

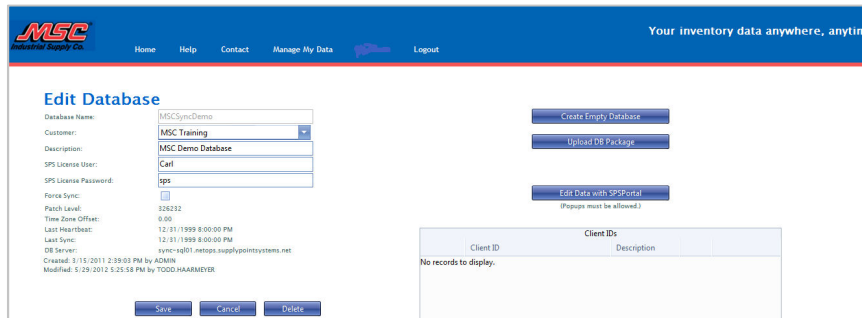
Step 2: Your Login for the website is:

UserName Password

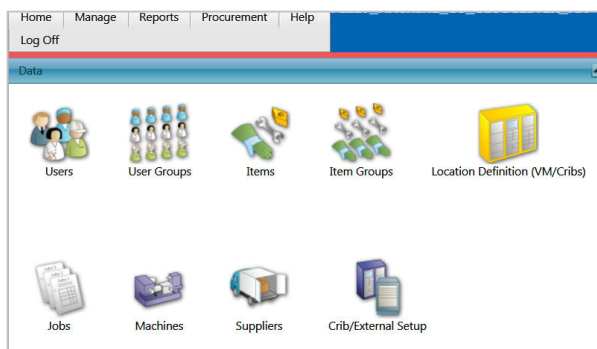
Step 3: Upon accessing the site you will need to select manage my data, and then select databases as indicated below.



Step 4: Depending on the level of access you have been granted, you will have the option to either click the name of your database or the 'Edit Data with SPSPortal' button.



Step 5: When the web page opens, you will see the icons for managing your data.



Adding/Copying Users

Control which individuals have the ability to access the machine.

Step 1: Access the Users Icon from the landing page.

STEP 1



Step 2: Locate a User whose profile you would like to copy

Step 3: Highlight that User (“Click on Name”)

Step 4: Hit the copy button (“2 Pieces of Paper”)

User ID	Description	Alias	Image File	Cost Center	Allow To Login	Can Access Crib/External Stock	User Is a Demo user	Ignore Fingerprint Check	Dispense Used Items First	Can Change Kit Issue
0032	JEFFERY ROGERS	Jeff Rogers			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0266	B.J.	B.J.			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0277	GRANT BOURLAND	Grant			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0294	GREGORY PARRISH	Greg			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

STEPS 2, 3, 4

Step 5: Update the User ID & User Name

Step 6: Identify if you would like to change any attributes associated with the user

Add New User

Details

User ID Password [Show Pas](#)

Description Cost Center

Alias Rationing Policy

Options

Allow To Login Can Exceed Kit Qty Offe

Can Access Crib/External Stock Can Ignore Kit Item Shortage Rest

User Is a Demo user Can Ignore Strict Return Rule Is H

STEP 5

STEP 6

Step 7: Hit the Save Button at the BOTTOM of the Page

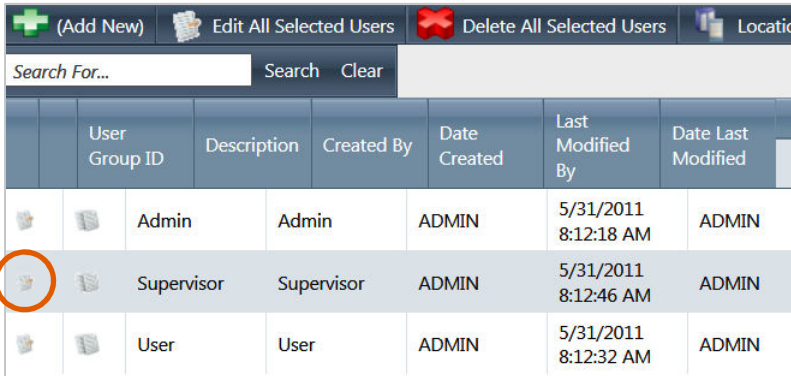
Adding/Modifying User Groups

It is advisable to put a user into a group rather than giving each individual user transactions. Typically, MSC will assign two user groups to choose from to make this step easier for you. Admin and User




Step 1: Access the Users Group Icon from the landing page.



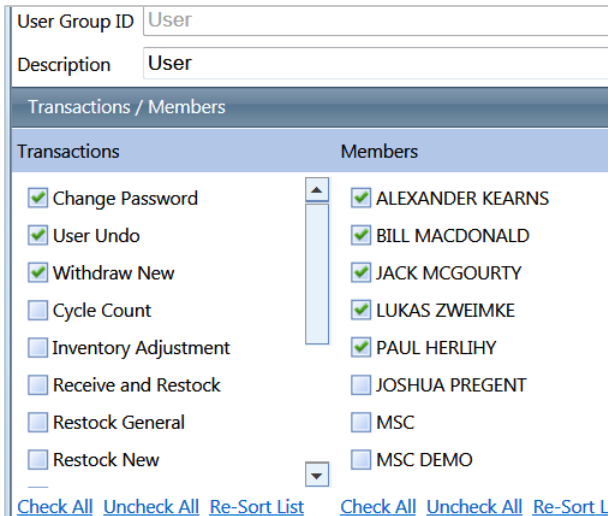
Step 2: Select the edit button “Paper with a pencil”



STEP 2

	User Group ID	Description	Created By	Date Created	Last Modified By	Date Last Modified
	Admin	Admin	ADMIN	5/31/2011 8:12:18 AM	ADMIN	
	Supervisor	Supervisor	ADMIN	5/31/2011 8:12:46 AM	ADMIN	
	User	User	ADMIN	5/31/2011 8:12:32 AM	ADMIN	

Step 3: Check the box of needed transactions for that User Group or change group members.



STEP 3

User Group ID	User
Description	User
Transactions / Members	
Transactions	Members
<input checked="" type="checkbox"/> Change Password	<input checked="" type="checkbox"/> ALEXANDER KEARNS
<input checked="" type="checkbox"/> User Undo	<input checked="" type="checkbox"/> BILL MACDONALD
<input checked="" type="checkbox"/> Withdraw New	<input checked="" type="checkbox"/> JACK MCGOURTY
<input type="checkbox"/> Cycle Count	<input checked="" type="checkbox"/> LUKAS ZWEIMKE
<input type="checkbox"/> Inventory Adjustment	<input checked="" type="checkbox"/> PAUL HERLIHY
<input type="checkbox"/> Receive and Restock	<input type="checkbox"/> JOSHUA PREGENT
<input type="checkbox"/> Restock General	<input type="checkbox"/> MSC
<input type="checkbox"/> Restock New	<input type="checkbox"/> MSC DEMO
Check All Uncheck All Re-Sort List	Check All Uncheck All Re-Sort L

Step 4: Hit the Save Button at the BOTTOM of the Page.

Utilizing Item Quick Add

*****Please note this applies to software version 4.1 or higher*****

The Add/Change/Delete (or A/C/D) form is used to properly communicate to MSC the items you would like to have stocked, and inventory levels set for your vending machine. This will also provide the MSC vending service center with the proper information to assist you with adding the items to the machine.

Step 1: Access the Item Quick Add Icon from the landing page.



Step 2: Upon accessing the Item Quick Add Page a single line is displayed for entry of the minimum details required to set up the new item. We require the following information MSC Part Number & Estimated Monthly usage, if MSC Part # is unavailable please type **NEED** in that field; please provide Mfg. Name (Brand) and Mfg. Part # (EDP) as well as monthly usage. If you have multiple items to add to the database you can click Add New Row and it will allow you to make multiple entries.

****Hovering over any of the headers will provide an overview of the information we are requesting****

Home ▾ Manage ▾ Reports Procurement Stock Transfer Help ▾ Log Off

MSC Quick Add <http://mscdirect.com> As you want it to appear in the machine database.

	Comments	Your Item Number	MSC Part Number	Mfg Name	Item Description	Mfg Part Number	Vending Machine	Estimated Monthly Usage
Remove	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	--VMID-- ▾	<input type="text"/>
Remove	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	--VMID-- ▾	<input type="text"/>
Remove	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	--VMID-- ▾	<input type="text"/>

ADD NEW ROW

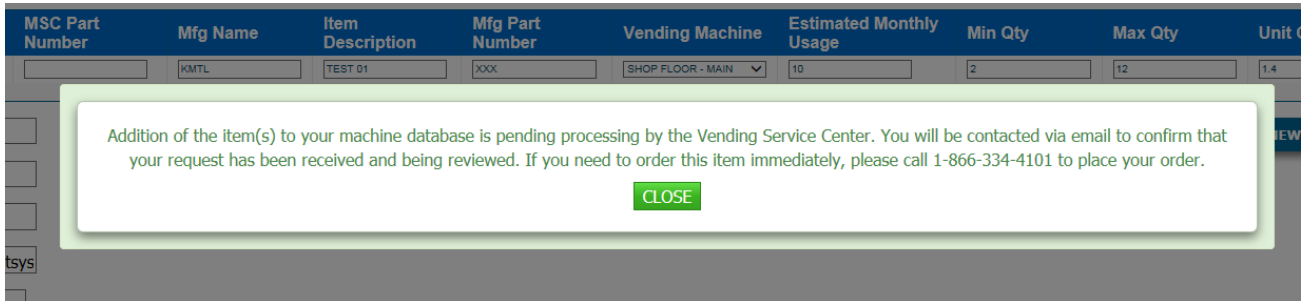
STEP 2

SUBMIT

Step 3: Upon completion of filling out your Item information, you will need to validate your contact information. The fields will auto populate with your name and email fields based on your login into the web portal. If the information is incorrect, go to each field to make the necessary changes. Upon completion hit submit to send your request off to MSC.

Your Name	<input type="text" value="Test"/>	STEP 3	ADD NEW ROW
Request Name	<input type="text"/>		SUBMIT
Phone	<input type="text"/>		
Email	<input type="text" value="Test@mscdirect.com"/>		
Request Comments	<input type="text"/>		

Step 4: After you click submit, a pop-up message will appear:



The Vending Service Center will verify the initial data, obtain any additional information that is required from the manufacturer, set the new item(s) up in your MSC vending database, work with Purchasing to ensure we have the necessary stocking level to cover your usage, and then complete the item record and activate the item in your machine(s)' database. Completing these preliminary steps helps to avoid delay of your EDI orders due to data mismatches or stock shortages.

Utilizing the Add Change Delete Form

*****Please note this applies to software version 4.0 or lower*****

The Add/Change/Delete (or A/C/D) form is used to properly communicate to MSC the items you would like to have stocked, and inventory levels set for your vending machine. This will also provide the MSC vending service center with the proper information to assist you with adding the items to the machine.


NOTE: Before adding an item through the website, please be sure to complete the A/C/D form, and EMAIL or FAX to the Vending Service Center to ensure pricing alignment as well as appropriate stocking levels.

- Email: vendingservice@mscdirect.com
- Phone: (866)334-4101 (Toll Free)
- Fax: (800)297-9742

Purpose of the: Add, Change, Delete Form

- Provide MSC with the pertinent item information - Including manufacturer and at least one of the following: MSC part number, manufacturer part number, and/or UIC number.
- Ensure that pricing is aligned.
- Ensure there are warehouse stock levels for your items. Calculated using the monthly usage provided on the form for each item.
- Important: Please be sure to use this form when deleting items from the system, as well. This will allow us to remove the reserved stock levels for your account, so other customers have access to the inventory.

Example: Add, Change, Delete Form

 ADD/CHANGE/DELETE															
MSC															
Today's Date: _____ Due Date: _____ Company Name: _____ Your Name: _____ MSC Account Number: _____ Requestor's Name: _____ CUSTOMER SIGNATURE: _____ Manager/Supervisor: _____						Vending Center Associate: _____ OSA: _____ VSR: _____ Branch Contact: _____ Branch: _____									
vendingservice@mscdirect.com															
Required Information															
Request Type	MSC Item Number	Mfg's Name	Item Description	MFG PART #	Vending Unit Location(s)	Estimate of Monthly Usage	MIN	MAX	Unit Cost	Dispense Qty	Is Item Located in another vending unit?	Customer Part Number	Approved Price	Est Lead Time	ITEM GROU
	SEV-CAL	12JDW0001 M16" BURR 3/32 X 3" SHANK	44510485	12JDW0001	Paint	12	5	12	\$ 41.04	1	No				
	SEV-CAL	12JDW0002 5/64" BURR 3/32 X 3" SHANK		12JDW0002	Paint	12	5	12	\$ 41.04	1	No				

Items

Creating a new item to add to your vending unit, this icon is also utilized to modify an existing item within your database.

Step 1: Access the Items icon from the landing page.

STEP 1  **STEPS 2, 3, 4**

Step 2: Locate an Item that is similar if possible to copy.

Step 3: Highlight that Item
"Click on the description"

Step 4: Hit the copy button
"2 Pieces of Paper"

	Item Number	Description	MSC#	Item Group	Item Sub Group	Supplier	Supplier Part Number
>	1001	80° ROUGHT TURN 0.030R	57108227	INSERTS	INSERTS_T	MSC	186
>	1002	55° FINISH TURN 0.015R	89075378	INSERTS	INSERTS_T	MSC	5505137
>	1003	55° FINISH TURN 0.004R	08555005	INSERTS	INSERTS_T	MSC	5505460
>	1004	55° FINISH TURN 0.030R	67632950	INSERTS	INSERTS_T	MSC	5504876

Step 5: Update the Item #, Description, MSC #, & Grouping (Located in Details)

Step 6: Update Supplier, Supplier #, Pricing, and Brand (Located in Purchasing)

Item Number:

Description:

MSC#:

Image File:

Item Group:

Item Sub Group:

STEP 5

Supplier: Part Number:

Brand: [\(Cross Reference\)](#)

Order in:

Package Size:

Unit Cost: Package Price:

STEP 6

Step 7: Update the MIN/MAX level for reorder. (Located in the Location Assignments)

STEP 7

Location Assignments

Machine #1 -- Not Assigned Crib# 2 -- Not Assigned

New Minimum Qty: Maximum Qty:

Step 8: Hit the Save Button at the BOTTOM of the Page

Drawer Setup

Assigning Items to a location for stocking.

Step 1: Drawer setup will be found in the “Configuration” section of the icon page.




Step 2: Click on an open drawer. (Green, Yellow or Gray)

Green - Empty Drawer

Yellow - Some compartments open to assign.

Red - Fully Assigned

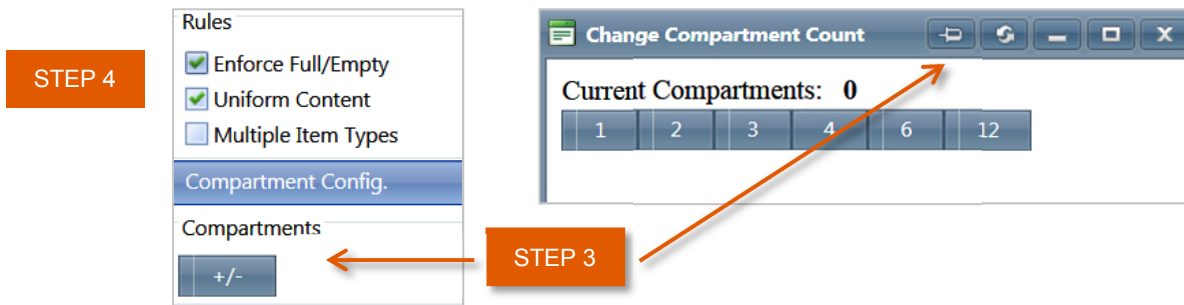
Gray - No compartments specified, Go to +/-



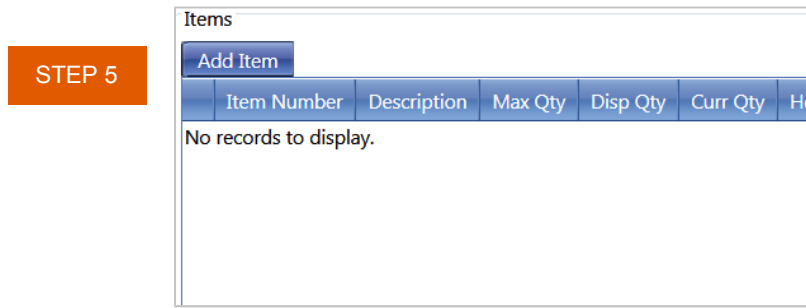
1014.1	1015.3	1017.1	1022	
1026	1035	1038	1041	
1044	1047	1050	1054	
1058	1062	1066	1076	
1080	1084	1093	1096	
1099	1102	1117	1120	
1123	1126	1129	1130	

Step 3: If the drawer needed is gray you will need to specify how many compartments the drawer physically has by scrolling down and hitting +/- sign. It will turn green.

Step 4: Once drawer is selected you can change Rules on a Drawer to house 1 unique item from front to back “Uniform Content” or Multiple Items in each compartment “Multiple Item Types” This requires you to add items to ever compartment needed.



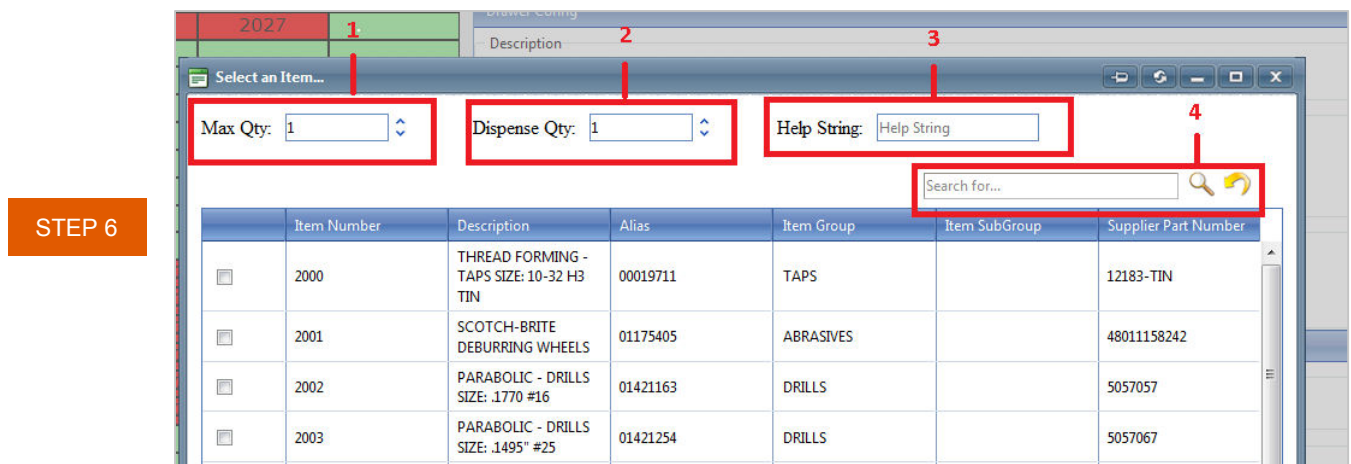
Step 5: With the drawer still selected hit “Add Item” button.



Step 6: The pop up of your Item List will occur for you to select the item.

Notes:

1. Max Qty= Max per compartment
2. Dispense Qty = How many transact at a time,
3. Help String = Withdraw Instructions or location
4. Search = Helps with finding item you want to assign

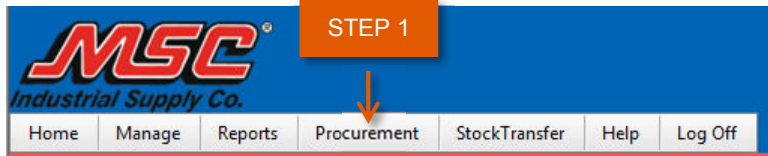


Step 7: Hit the Save Button at the BOTTOM of the Page

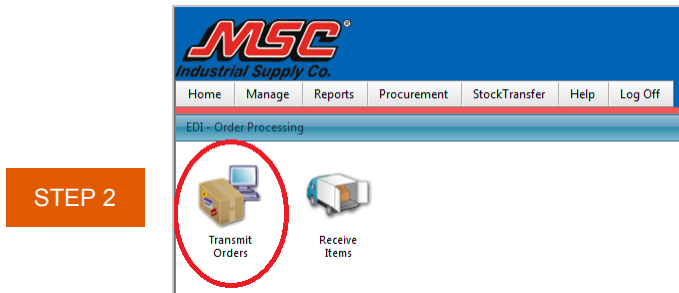
Ordering/EDI

This function allows you (the user) to transmit orders manually for your vending machine. The software allows you to set auto ordering as well if you would like to move away from the manual process.

Step 1: Select the Procurement Tab from the Icons Page



Step 2: Select Transmit Orders

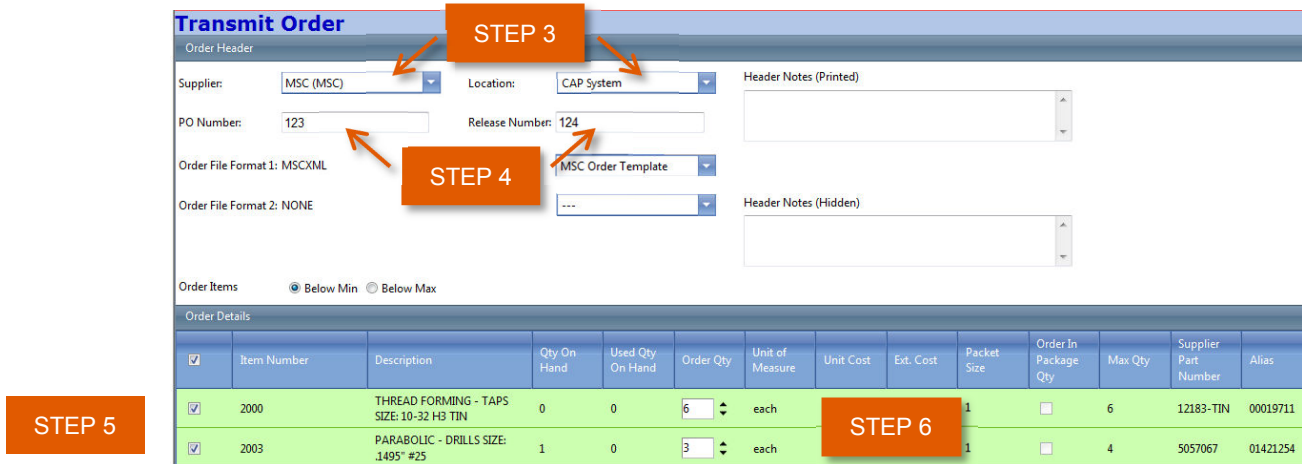


Step 3: Verify MSC is set as Supplier and Proper Location for Order

Step 4: Specify PO# if needed and Release. Release will roll with Blanket PO's.

Step 5: Check and uncheck items needed for the order with the boxes to the left.

Step 6: Adjust the QTY needed by selecting the item and changing the Order Qty.



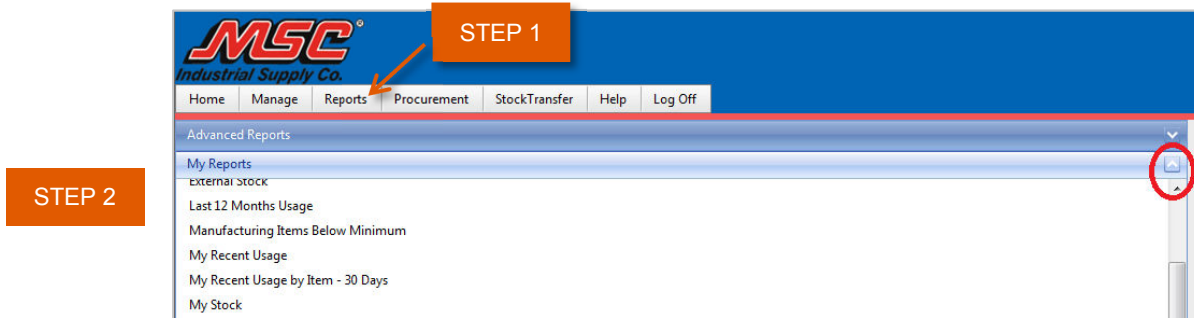
Step 7: When the order appears correct hit the Transmit Order button.

Reporting

MSC Vending System offers a variety of canned reports typically located under my reports as well as a section of advanced reports which allow you to customize to your needs.

Step 1: Select the Reports Tab from the top of the Icon Page

Step 2: Standard Reports will be built into the My Reports section.



Step 3: Select the Report you wish to run and hit Edit to make changes to the data.

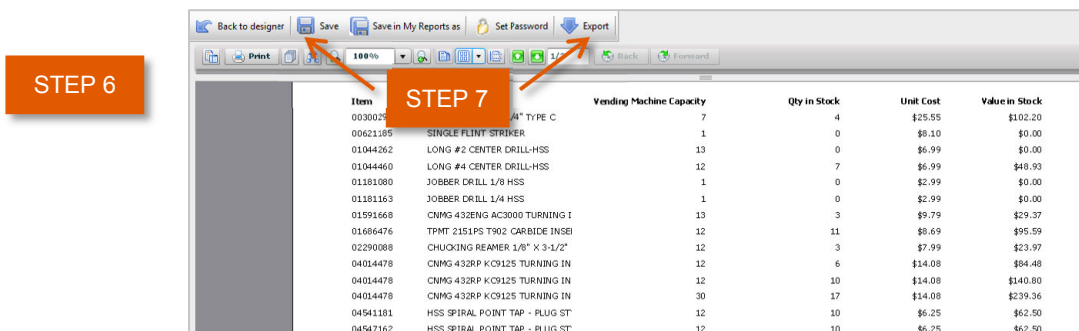
Step 4: You can change what will display by checking the boxes next to the data field.

Step 5: Once you are satisfied you can then hit Run to display your report.



Step 6: The report will display with the data field that were checked.

Step 7: You can go back to the designer, print, or export if you wish.

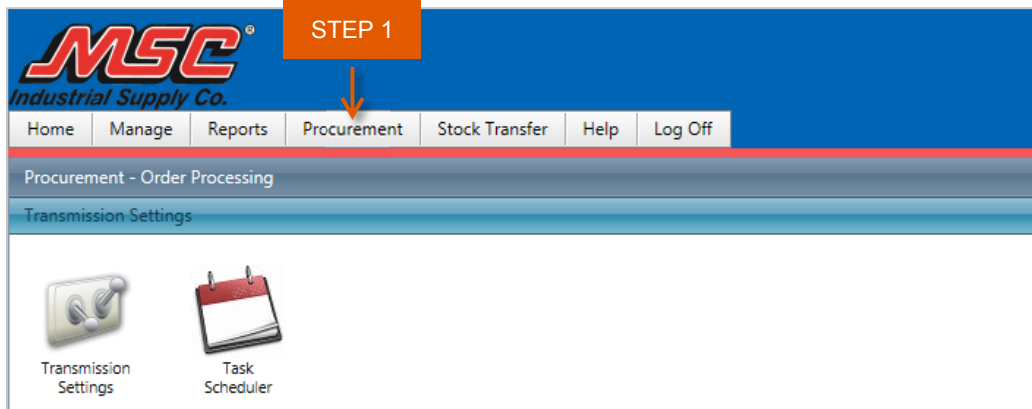


Transmission Settings

MSC Vending System offers the ability for the customer to establish specified person(s) who receive reports.

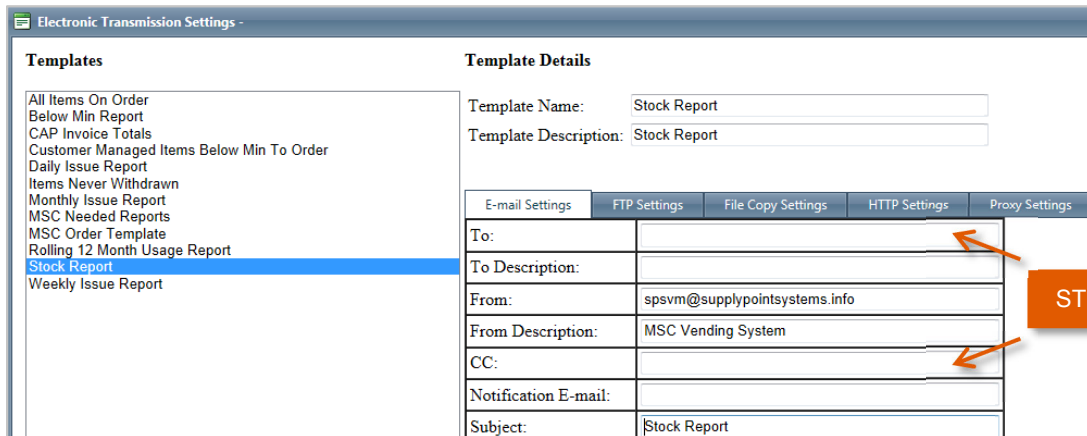
Step 1: Select the Procurement Tab from the top of the Icon Page

Step 2: Select the Transmission Setting icon under the Transmission Settings Tab



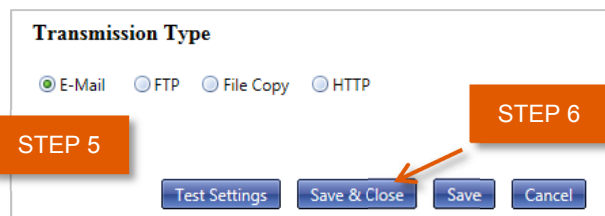
Step 3: The pop up of your report templates will show, you can select an existing report template or create a brand new one.

Step 4: Add the email addresses of your recipients in the To: and CC: field that you would like to see receive the report.



Step 5: Once email addresses have been entered click on the test settings button, a test email will be sent for validation.

Step 6: Click save and close at bottom of the page.

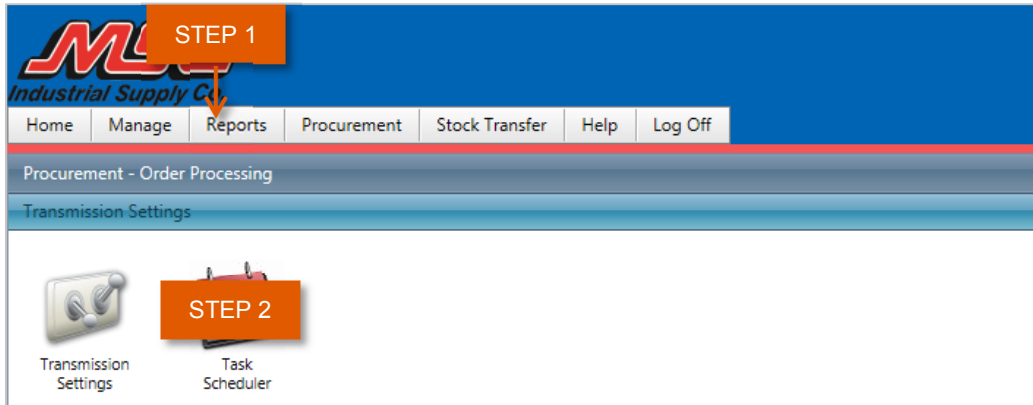


Scheduled Tasks

MSC Vending System offers the ability for the customer to establish specified times for recipients to receive their reports.

Step 1: Select the Procurement Tab from the top of the Icon Page

Step 2: Select the Task Scheduler icon under the Transmission Settings Tab



Step 3: The pop up of your report templates will show, you can select an existing task to modify or click Add New to create a new task.

Step 4: If adding new select the report from the drop down box and specify the frequency, time, and start date of when you would like the report to run.

Step 5: Click save on the report you are creating or modifying which will add it to the list on the left side of your page.

