



## Online VendMAX 101

### Session #6

## Objective

The goals for the participants of this session are to demonstrate knowledge of Trucks, Zones, and Routes. Please take notes on the subjects that are covered, as everyone involved in this session will need to be certified upon completion.

## Trucks

You can go to Masterfile's/Trucks (Note: When adding a new truck to VendMax a new Zone for that truck will also be created. Do not modify the TRK: Zone in VendMAX)

Click the **+** sign to add a new record

**Description** - Descriptive name of a Truck. It is recommended that the description begin with the word Truck. This can make the task of creating Zone-to-Zone Transfers for route issues much easier. When these transactions are created on the Handheld, you will need to search a list of all trucks to find the correct one. The list will be displayed alphabetically.

**Code** - This code, like all Master table codes in **VendMAX**, can be assigned by the user, or auto-assigned by **VendMAX**. If the field is left blank when creating a new Truck, the system will auto-assign the next sequentially available code number when the SAVE button is selected. The CODE for a Truck can be changed at anytime in the future by any user with edit authorization of the Invoice Items table in Security Setting. Codes can be alphanumeric, and up to 16 characters. Codes are required for each record, and must be unique within each site in the database.

**Category** - Category is available as another way to group and sort Truck records. The values that are entered are user defined, and no value needs to be entered.

**User Defined Fields** - The Miscellaneous tab allows you to setup and maintain 10 User Defined data fields for Trucks. Most Master Tables in VendMAX provide a place to create and maintain 10 User Defined data fields. The use of these fields is optional. For information on activating and defining User Defined fields in VendMAX

**In Service Date** Date the Truck was placed in service

**Out Service Date** Date the Truck was taken out of service

## Zones

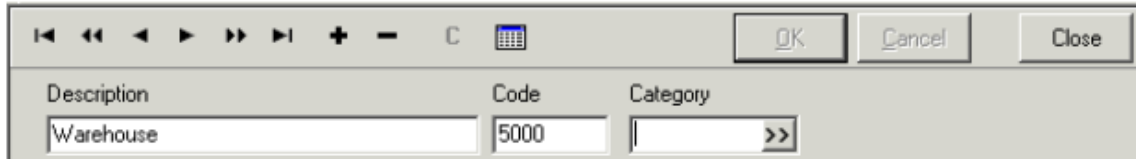
**Introduction** – In **VendMAX**, a Zone is a physical area where equipment and products are stored. When Inventory is initially received, it is placed in a Zone. That Inventory can be transferred from one Zone to another through a Zone-to-Zone transfer. Inventory is then disposed from the **VendMAX** Inventory tracking system when it is placed in a Vending Machine, or

Delivered as part of a Delivery Sale.

In addition, when Vending Equipment and Non-Vending Equipment database records are initially created, the equipment must be identified as being placed in a Zone. The Equipment that is in a Zone is available to be moved to a Point of Sale. If it is removed from the POS, it must again be removed to a Zone. This cycle constitutes the Asset Tracking system in VendMAX.

In this context, common examples of zones are; a main warehouse, a satellite warehouse, or a truck.

There are two options to choose from to get started. You can use the Drop down Menu option or the Quick Link option on the left hand side of **VendMAX** screen.



You can go to **Masterfile's/Zones**

Click the **+** sign to add a new record

**Description** - Descriptive name of Zone. This field should contain an easily recognizable common name for the Zone. The description should be kept as short as possible. In particular, users of the VendMax Warehouse Handheld system will be selecting this Zone name from a list of all Zones when creating Receipts into the Zone, or Zone-to-Zone transfers which affect the Zone.

**Code** - This code, like all Master table codes in VendMax, can be assigned by the user, or auto-assigned by VendMax. If the field is left blank when creating a new Zone, the system will auto-assign the next sequentially available code number when the SAVE button is selected. The CODE for a customer can be changed at anytime in the future by any user with edit authorization of the Zones table in Security Settings Codes can be alpha-numeric, and up to 16 characters. Codes are required for each record, and must be unique within each site in the database.

**Category** - Category is available as another way to group and sort Customer records. The values that are entered are user defined, and no value needs to be entered.

## Equipment Tab

Vending Equipment		Change Zone...					
Description	Code	Cat	Type	Make	Model	Serial Number	
▶ Manitoc Ice Machine	ICE01	ICE	GE	Manitoc	200	960462831	
rmi coffee	RM001	COF	BF	rmi	1400-fd	65256	
microwave	MI001	MIC	GE	Litton	Vendmaster	7821	

**Vending Equipment** - Equipment list that is available in the zone

**Change Zone** - This button will reveal a dialog box that provides a lookup for a new Zone, and allows the user to select the date and time that the move will become effective. This is the

proper method for transferring equipment between sites and between different Zones within a Site.

**Non-Vending Equipment** - Non-Vending Equipment list that is available in the zone

**Change Zone** - This button will reveal a dialog box that provides a lookup for a new Zone, and allows the user to select the date and time that the move will become effective. This is the proper method for transferring equipment between sites and between different Zones within a Site

Equipment Placement History						
	Eff Date ↑	Add/Remove	Equipment	Code	Cat	Serial Number
▶	02/12/2002	Added	rowe snack	R0013	SNA	03944
	02/12/2002	Removed	SNACK	AP043	5030	

### Equipment Placement History

This screen area keeps track of all of the Vending and Non-Vending Equipment moves that have been made to this Zone.

The data in this list area of the screen can be sorted.

#### **Effective Date**

This field will show the date and time that the equipment placement history item became effective.

#### **Add/Remove**

This field will show either Add or Remove to indicate what action was taken.

#### **Equipment**

These fields will provide a list of the Description, Code, Category and Serial Number of the equipment that has been added or removed on this line.

### **Zone Inventory Tab**

Product inventory if applicable to a product related zone based on the date selected.

### **Zone Par Items Tab**

The Zone Par Items tab of the Zones Master File is an area to keep a list of all products and their quantities which you would intend to have in the Zone. This information is used for re-ordering in the case of Warehouse Zones, or for automatic creation of Zone-to-Zone transfers in the case of Truck Zones. This screen will allow you to create a list of products, with a re-order level and target inventory for each. When you run the Purchase Order Request Report in **VendMAX**, the system compares the current system Inventory level of each product to the information contained on this page to decide which items should be ordered, and in what quantities. When Automatic Truck Loading is turned to "Use Zone Par", **VendMAX** will compare the current system

Inventory in the Truck Zone against the values on this page to calculate the required product loads. These will then be added to a Zone to Zone Order for that Truck.

### *Misc. Info Tab*

Description: Commissary, Code: 501, Category: >>

Equipment | Zone Inventory | Zone Par Items | **Misc Info** | Quick View: Inventory

Inventory By Family

Share for Zone To Zone Transfers

Enable Cold Food Ordering

Weeks for Menu Rotation: 4, Lock Time (hours): 24, CF Order Cycles: 3

Rotation Start (Sunday): 5/26/2013

User Defined Fields:  
<User Defined Field (not used)>  
<User Defined Field (not used)>  
<User Defined Field (not used)>

In Service Date: [Dropdown]  
Out Service Date: [Dropdown]

#### **Inventory By Family**

This checkbox is in place to identify that the Zone is intended to be inventoried by Family rather than specific item level product. The main effect of this setting is when creating Physical Inventory for this Zone. In this case, the list of Products that can be chosen from the Product Picker list will only include the Generic Product items that represent the Product Family. No specific SKU's can be selected if this checkbox is selected ON.

#### **Share for Zone to Zone Transfers**

This setting will have no effect in a single site installation. In a multi-site operation, there may be operations in several states. While most users of **VendMAX** and the **VendMAX** handheld will have their data access limited to a single Site, there are occasions when Products or Equipment must be transferred between warehouses that belong to different Sites. When this checkbox is turned ON, this Zone description will show in the Zones list for Zone-to-Zone transfers even when the user does not have access to other data at the site to which this Zone belongs.

#### **Cold Food Zones**

Enable Cold Food Ordering

This setting defines the zone as being a Cold Food Zone, or a Commissary where cold food is made or received.

#### **Weeks for Menu Rotation**

The number of different weekly menus the zone has.

#### **Menu Rotation Start (Sunday)**

The start date you will be able to begin ordering cold food from the commissary.

#### **Lock Time (hours)**

The amount of time before a Cold Food Order is due to be delivered that the order cannot be changed. The time is counted back from 12:00 A.M. of the day the order is to be delivered. For example, if an order is due to be delivered on Tuesday, and the lock time is set at 48 hours, the order cannot be edited after Sunday at 12:00 A.M (early Sunday morning).

### ***In Service Date***

This field can be left blank. It is a place to record the date when a Zone is first established.

### ***Out of Service Date***

In **VendMAX**, most Master File records cannot simply be deleted, because other table records in the **VendMAX** database refer to them. As an example, if there are Vend Visits that have been created against a POS that POS must remain in the database forever. However, Vending Operators sometimes lose an account, reduce the number of POS' at an existing account, or sell a vending machine. Therefore, there needs to be a way to leave the record in the database, and still make it disappear from all reports and lists within the system. That is accomplished by entering a date into this field. This date will establish when this record is no longer to appear in these reports and other lists. This record can be brought back into service simply by erasing the date from this field.

### **User Defined Fields**

The Miscellaneous tab allows you to setup and maintain 10 User Defined data fields for Zones. Most Master Tables in **VendMAX** provide a place to create and maintain 10 User Defined data fields. The use of these fields is optional. For information on activating and defining User Defined fields in **VendMAX**, see [User defined fields](#)

### ***Quick View Inventory***

Product/Product Group	Beginning Physical Units	Receipt Units	Transfer In Units	Transfer Out Units	Delivery Units	Vending Units	Transfer In \$	Transfer Out \$
12 Oz Hot Bev Cup	4935	0	0	0	0	0	\$0.00	\$0.00
12/14/16/20 Oz Lids	50	0	0	0	0	0	\$0.00	\$0.00

Once the data parameters have been set and the Load Data button has been selected, VendMAX will pull each Inventory Transaction affecting this Zone between these two dates and accumulate the data that was stored with each.

All of the rules about manipulating data in Grid View within VendMAX apply to this screen also. You can sort the data, add or remove data columns, and reorder the data columns.

### **Product / Product Group**

This is the identifier for the group being reported in the current row of data. This column will contain a list of all products or all product families that were located in this Zone during the time requested.

**Beginning Physical Units / \$** This is the system calculated Inventory value for the Product or Product Family line item, on the Beginning Date. The \$ value is calculated as the number of units multiplied by the Cost of Goods value for the products.

### **Receipt Units / \$**

This is the total number of units received into the Zone for the Product or Product Family line item, between the Beginning and Ending Dates. The \$ value is calculated as the number of units multiplied by the Cost of Goods value for the products.

### **Transfer in Units / \$**

This is the total number of units Transferred into the Zone for the Product or Product Family line item, between the Beginning and Ending Dates. The \$ value is calculated as the number of units multiplied by the Cost of Goods value for the products.

### **Transfer Out Units / \$**

This is the total number of units Transferred Out of the Zone for the Product or Product Family line item, between the Beginning and Ending Dates. The \$ value is calculated as the number of units multiplied by the Cost of Goods value for the products.

### **Vending Units / \$**

This is the total number of units that were pulled from this Zone for filling Vending Machines, between the Beginning and Ending Dates. The \$ value is calculated as the number of units multiplied by the Cost of goods value for the products.

### **Delivery Units / \$**

This is the total number of units that were pulled from this Zone for the purpose of Delivery Sales, between the Beginning and Ending Dates. The \$ value is calculated as the number of units multiplied by the Cost of goods value for the products.

### ***Quick View Inventory Tab***

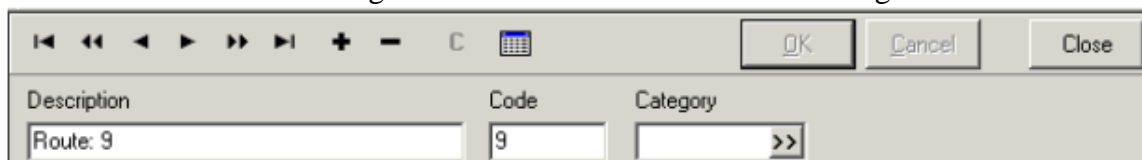
The Quick View: Inventory screen will provide information about Product movement through this Zone. There are several tools provided for manipulation of the output, and there are output options to copy this data to the Windows clipboard or directly into Microsoft Excel.

## **Routes**

In **VendMAX**, users sometimes confuse three independent entities as the same thing. Trucks, Routes and Drivers can all be interchanged. In this case, the Route connects to the Points of Sale. In fact, the definition of a Route is a collection of Points of Sale.

There are two options to choose from to get started.

You can use the Drop down Menu option or the Quick Link option on the left hand side of **VendMAX** screen. You can go to Masterfile's/Zones Click the **+** sign to add a new record



Description	Code	Category
Route: 9	9	>>

### **Description**

Descriptive name of the Route. The Main Tab provides a place to assign a standard driver, so it is not usually a good idea to name the route after the driver. It is usually best to name the route with a number, rather than a name, as the geography of this route may change over time, and the driver may change. The description can be changed later if needed.

## Code

This code, like all Master table codes in VendMAX, can be assigned by the user, or auto-assigned by VendMAX. If the field is left blank when creating a new Route, the system will auto-assign the next sequentially available code number when the SAVE button is selected. The CODE for a route can be changed at any time in the future by any user with edit authorization of the Customer table in Security Settings. Codes can be alphanumeric, and up to 16 characters. Codes are required for each record, and must be unique within each site in the database.

## Category

Category is available as another way to group and sort Route records. The values that are entered are user defined, and no value needs to be entered.

## MainTab

The screenshot shows the 'MainTab' for a route named 'Route 04'. The form is organized into several sections:

- Header:** Description (Route 04), Code (04), and Category (blank).
- Navigation:** Main | Sequencing | Misc Info | Pick Up Routes | Quick View: Financials | Quick View: Sales | View Vend Visits | View Sales | Equipment Zones | Cost Options
- General Settings:**
  - Route does Vending
  - Route does Delivery
  - Use fund for changers
  - Use fund for refunds
  - Use fund for recyclers
  - Pre-Kit Policy: Depends On POS Sr
  - Create PreKit ZZZ
  - Include Ex Box in PreKit ZZZ
  - Enable Dynamic Scheduling
  - Schedule Lead Time (hours): [ ]
  - Allow Service on Holidays
  - Use Proactive Scheduling
  - Schedule: [ 1 ] Days Earlier
  - Target Range of POS's to be scheduled: Min [ 30 ] Max [ 35 ]  Use Default
  - Target Stops: [ 20 ]  Use Default
- Automatic Truck Loading:**
  - Vending Method: [ None ]
  - Overload Factor: [ ] %
  - Delivery Method: [ None ]
  - Order overrides delivery method
  - Use per if greater than order
  - Don't allow more than truck per
  - Remove Unneeded Product
  - Lead Time (hours): [ ]
  - Auto Populate Fills/Adds When Using ATL: [ Default ]
- HH Exceptions:**
  - HH Inventory Method: [ Beginning ]
  - HH Inventory Tracking
  - Wizard Mode
  - Hide total of on HH
  - Integrated with LS
- Inventory Policy:**
  - From Truck: [ ]
  - Assigned Truck: [ Truck RT 04 ]
  - Products And Items Sort Order: [ As Entered ]
  - Route Supervisor: [ James ]
- Standard Driver:** [ Nadia ]
- Load Zone:** [ Pre-Kit Snack Zone ]
- Buttons:** Create Pre-Kit Zones

### **Route does Vending**

Check this if this route does vending.

### **Route does Delivery**

Check this if this route does delivery (OCS, bottled water, etc.).

### **Use fund for changers**

### **Use fund for refunds**



These options effect the calculation of accountability numbers for this route. The question being asked is whether the Route is supposed to CONSUME the change fund, rather than replenish it from cash collections. When an expected cash value is calculated, VendMAX needs to know if the cash collection is supposed to be short by the same amount that the driver recorded having put in the Coin Mech, or gave in Refunds. The box is to be checked if money is used to replenish the coin mech and NO money is being removed from the machine to be placed back into the change bag

If these options are set incorrectly, the Cash Accountability O/S values will be off by the same amount as the Coin Mech or Refunds were used on that Vend Visit.


***Use fund for recyclers***

If the route is using a fund to replenish the bill recycler, check this box. The box is to be checked if money is used to replenish the recycler and NO money is being removed from the machine to be placed back into the change bag

***Enable Dynamic Scheduling***

Choosing this option allows Points of Sale to be scheduled dynamically. This option must be chosen for each route with Dynamically Scheduled Point of Sale for those to schedule. After choosing this option, you must then configure the settings for the route using the 'Configure' button. These settings can be overridden at the Point of Sale level.

**Pre-Kit Policy** - Pre-Kitting causes VendMAX to use its predictive modeling techniques to estimate the needs of the POS before the driver goes to the account. This will allow the warehouse to pre-pack the machine load. When Pre-Kit is turned on, the Handheld assumes that the driver will be loading from the estimate list, unless it is edited. The actual sales data from the machine is then used to refine the estimates for the next trip, but does not affect the task on the Vend Visit.

Click on the drop down  and pick the appropriate setting. This setting is defaulted to No Machines, as this area will be covered more in later training.

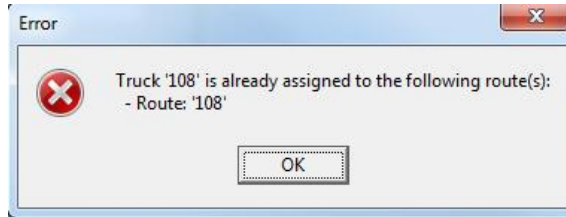
**Inventory Policy** - When Products are added to POS' on this route, the Inventory is usually taken from a Route Truck, and therefore, the Inventory Policy would be set to 'From Truck'. In this case, the 'Assigned Truck' field below must be set with the appropriate Truck. This applies to servicing Vending POS.

Under some circumstances, there is no truck involved in the Route service, and inventory is taken directly from an Inventory Zone. This would be the case in an Attendant Location, where inventory is pulled from a storage closet, not a truck. In this case, this field should be set to 'From Zone', and the Inventory Pull Zone below must be set.

Regardless of Inventory Policy, a delivery POS will always use the 'Assigned Truck zone', unless the POS has a specified Pull from Zone.

**Assigned truck** - Set this to the truck that will be used for this route. This only needs to be set when the 'Inventory Policy' is set to From Truck. A truck cannot be assigned to more than one route at a time. VendMax provides a warning message when a truck is already assigned to another route





**Product and Items Sort order** - This portion is covered in **DeliveryMAX** training if purchased.

**Standard Driver** - Set this to the driver that normally services this route. This driver will be accountable for cash collections and inventory. This is also the Employee that will accrue any Driver Commissions setup for the POS' on this Route. The default driver can change as often as necessary. Click on **>>** to pick from available EAU to assign.

A driver cannot be assigned to more than one route at any one time. VendMax provides a warning message when a driver is already assigned to another route.



**Load Zone** - Set this to the Inventory Zone that will be used to fill POS for this route. This only needs to be set if the 'Inventory Policy' is set to From Zone, or if you are using pre-kitting or automatic truck loading. This would be the case for Attendant Locations, and some other special situations.

**Automatic Truck Loading** - This will be covered later in training

**Sequencing Tab** - This will be covered later in training

**Misc. Info Tab** - User defined or assigned if desired