

365 Vendmax Integration

Operator's Guide





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DOCUMENT REVISIONS			
Revision	Revision Date	Author	Comments
0.1	6/4/2015	Chad Young	Original draft copy for field trials.
0.2	8/24/2015	Chad Young	Button support was removed from <i>Limitation and Known Issues</i> . FAQ was updated.
0.3	10/9/2015	Chad Young	<i>Enabling for an Existing Market</i> section added.
1.0	11/12/2015	Chad Young	Guide finalized for general release of product.
1.1	7/26/2019	Laurie Sidwell	Branded and edited for grammar & punctuation

Overview

The 365-Vendmax Integration is a data exchange between 365 Retail Markets and Crane Streamware using the VDI industry standard for integrating Vending Management Systems and MicroMarkets.

Key Terms

Operator – The business entity that installs and manages the MicroMarket.

Vending Management System (VMS) – The route accounting system typically used to support the vending business and OCS business.

MicroMarket System (MMS) – The key “system” in this solution is the kiosk and associated services that allow consumers to purchase items from the market using a self-checkout process.

Kiosk – The self-checkout system and hardware used for purchasing products in the MicroMarket.

Market – The physical room where the MicroMarket exists. The market may contain one or more kiosks. The market may also be referred to as a location on SmartHQ.

Client – The client account where the market operates. The Operator “sells” the MicroMarket concept to the client and then installs the store to conduct business.

Consumer – The individual who actually purchases the product in the market.

Crane – The parent company of Streamware.

Streamware – The vending technology division of Crane.

Vendmax – The VMS software suite offered by Streamware for inventory, pre-kitting and reporting, primarily used to support the vending business.

Vending Data Interchange (VDI) – VDI is set of vending technology standards managed by the VDI Task Force, overseen by the NAMA trade association.

VDI VMS–MMS Integration Standard – The VDI standard was developed by 365 Retail Markets in cooperation with Streamware to normalize the exchange of data between MicroMarkets and Vending Management Systems.

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Key Stakeholders

365 Account Manager – Responsible for initiating the project and drafting a proposal for the Vendmax integrated kiosk.

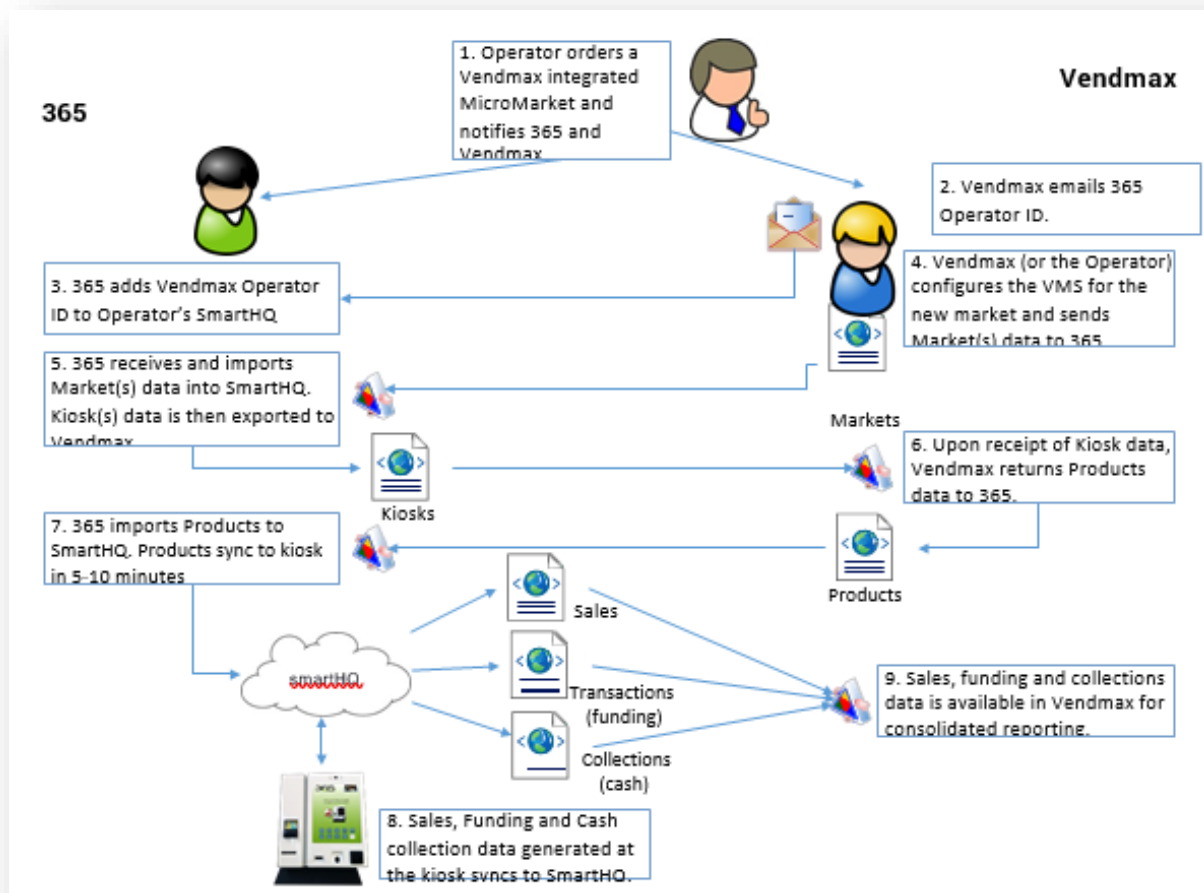
365 Project Coordinator – Primary contact at 365 to support interface configuration and market go live.

Operator Lead – Coordinates client and Operator resources.

Vendmax Project Coordinator – Primary contact to facilitate Vendmax related configuration.

Operational Changes

As with most data integrations, there are several operational changes since key processes will now be handled by an external system, in this case Vendmax. At the highest level, 365 generates and sends funding, sales, asset (kiosk) and cash collection data to Vendmax and Vendmax provides 365 market and product data.



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Procurement

When ordering a kiosk, the Operator will need to notify both Vendmax and their 365 Account manager that the market will be integrated. Not all versions of Vendmax and 365's software is compatible to the integration, so be sure to leave plenty of time for any necessary system upgrades.

Note: Vendmax integration is only supported in Gen2 SP3.3 software versions and later.

Adding a New Market

Adding a new location (market) to SmartHQ will now be handled through the integration so there is one true source for things like market name and address.

The Operator will provide 365 with their Vendmax Operator ID manually through email or over the phone.

The new market is configured in Vendmax. The integration is enabled in Vendmax. This sends 365 the name and address of the market through the integration.

Enabling for an Existing Market

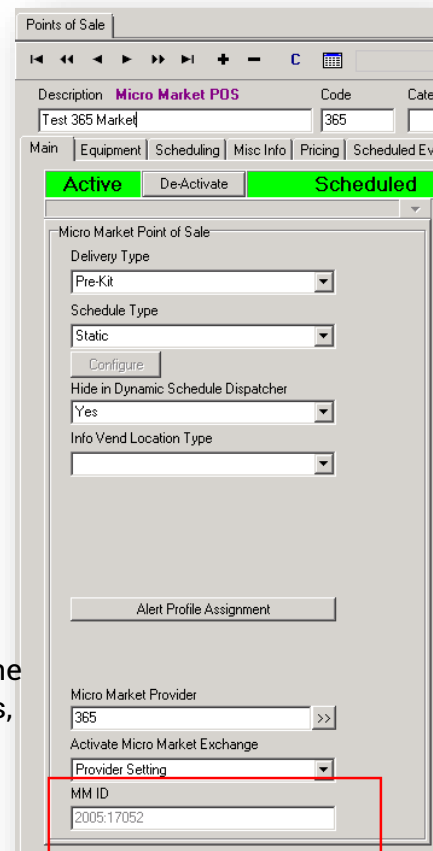
If the market already exists in SmartHQ the process for enabling the integration will be as follows:

1. The Operator provides 365 their Vendmax Operator ID manually through email or over the phone.
2. The market is created in Vendmax.
3. The Operator provides 365 the market's MM ID.
4. 365 add the MM ID to the existing location on SmartHQ.
5. The integration can be enabled.

Kiosk Staging and Shipping

365 cannot stage or ship the kiosk until Vendmax provides the Market(s) data. When 365 gets the market name and address, we will associate the kiosk serial number to the market and return kiosk(s) data to Vendmax. This data includes:

- Kiosk serial number
- Date and time of last sync to SmartHQ
- Date and time of last transaction





Product Catalog

Vendmax integrated markets will not manage their products through SmartHQ. The initial setup and maintenance of the products will be entirely handled in Vendmax. After the kiosk data has been received by Vendmax, they will return Product data to 365. The Products will import to SmartHQ and then sync to the kiosk. Adding and modifying products in SmartHQ will then be disabled. Products data includes:

- Target market
- Product ID
- Barcode
- Product name
- Price
- Cost
- Tax
- Fee (bottle deposit)

Reporting

Activity on the kiosk, such as sales, funding and driver cash out, will be sent to Vendmax so that Operators will have a consolidated set of reporting for both vending machines and MicroMarkets. All reports on SmartHQ will still be available.

Sales

Sales data from the kiosk will be sent through the interface every five minutes (remember it also takes five minutes for data to sync to SmartHQ). Each sale reported will be represented by a "ticket", or collection of products as part of the purchase. This data includes:

- Source market
- Source kiosk
- Date and time of the sale
- Consumer ID (for Account purchases)
- Price
- Discount
- Tender
- Fee
- Tax
- Ticket total
- Product ID
- Barcode
- Cost

Transactions (Account Funding)

Consumer funding activity from the kiosk, SmartHQ or MyMarketAccount.com will be also be sent through the integration every five minutes. This data includes:

- Source market
- Consumer ID
- Type
 - Cash
 - Credit and debit card
 - Adjustment (through SmartHQ or Admin Portal)
- Date and time of funding activity
- Amount
- Bills inserted (for cash funding)

Cash Collection

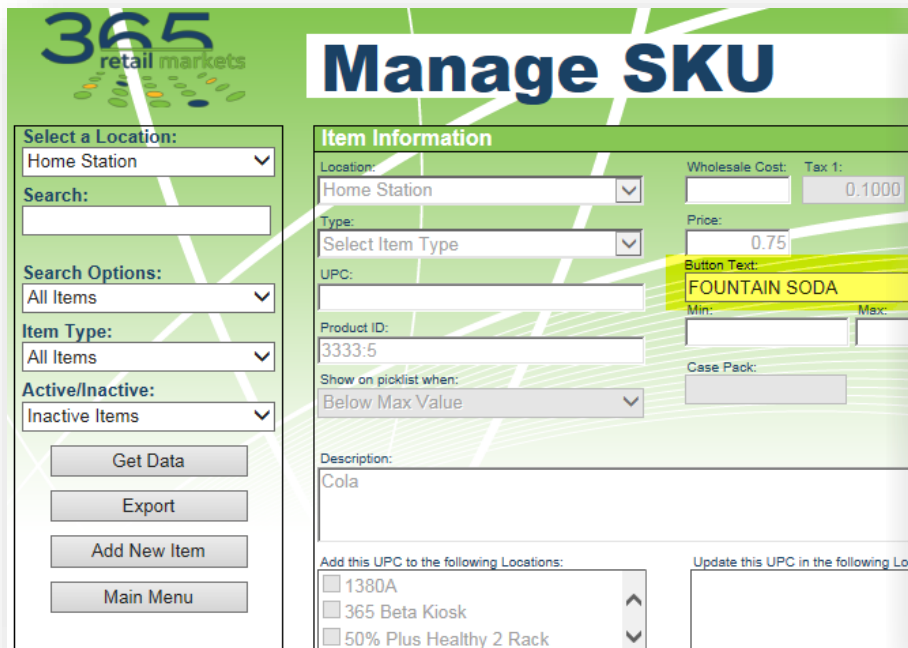
To create a single source of cash accountability, driver cash out data is also sent through the integration as they occur. Cash collection data includes:

- Source market
- Source kiosk
- Collection date and time
- Total amount of cash collected
- Driver user name
- Bills collected

FAQ

1. How do I add buttons to the kiosk?

Any product imported into SmartHQ from Vendmax can be turned into a button. Once the Product Catalog has been received. Go to **Manage SKU** in SmartHQ and add a **Button Text** to the product. You'll find most fields are **Read Only** except **Button Text**.



2. How do I Multi-Store Link (MSL) markets if they are now first created in Vendmax?

Follow the standard process to let your 365 Account Manager know when two markets are to be parts of an MSL. After importing the Markets data from Vendmax, 365 can MSL any markets **as long as consumers have not started doing transactions**.

3. How do I add or update new products in my MicroMarket?

For integrated markets, all product maintenance is performed in Vendmax. This includes adding new products, changing existing products, or discontinuing products. Product maintenance through SmartHQ is not supported for integrated markets.

Appendix A: VDI VMS – MMS Integration Standard

Purpose of the Standard

Developing and adhering to an industry standard for integrating MicroMarkets and Vending Management Systems provides benefits not only to Operators, but also the respective MMS and VMS. Some of these benefits include:

- Specifying the system features needed to manage a MicroMarket business.
- Defining which system should be responsible for each feature.
- Reducing cost and time when integrating new MMS or VMS providers.
- Promoting interchangeability and compatibility between systems.

Objectives and Goals

Our objective in developing a standard is to identify key information and system features that are required to manage a MicroMarket business and then decide which system should "own" this information or feature.

Because of the difficulty of managing the same data in multiple systems and keeping this data in synch, it is our goal that only one system manages or creates a specific set of data. It is acceptable for a set of data to be shared with the other system, so that the second system can perform certain tasks that are required by MicroMarket operations. It is understood that both systems (and their vendors) can implement all system features listed in this document. However, we will base this document on the fact that this single system does not exist, and we need to clearly define the one system that the Operator should use to complete a specific task.

Integrating MMS and VMS will also provide a consolidated source for both MicroMarket and vending machine management which includes:

- Full warehouse inventory accountability
- A single source for sales and inventory reporting
- A single source for product and price Information
- A single hand-held for servicing both vending POS and MicroMarket POS
- Pre-kitting using as near to real time sales as possible
- Complete cash and inventory accountability