

Xpress Vendor Web Portal – Quick Tutorial

Tutorial:

1. How To Log In
 - a. The link for the website is <https://vendor.xpressinventory.com>
 - b. After your 1st login, you'll be required to accept the Terms & Conditions for <https://vendor.xpressinventory.com>.
2. Once you've logged in, your browser will show your name, company name, and company logo (if any). If your company logo is missing or is not correct please send it to support@xpressinventory.com for upload.

User: Test User
Company:
Warehouse: [ALL]

Reports Tools Help Sign Out

Jobs Warehouse Stock Tank Stock Inventory Tickets

Select Your View Tab

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3. By default the warehouse dropdown list will show [ALL]. You can view your products in all warehouses at one time or narrow your search by selecting a specific warehouse.
4. There are 4 tabs available; Jobs, Warehouse Stock, Tank Stock and Inventory Tickets. We will describe the Inventory Tickets screen in detail. The other tabs work similarly.
 - a. Click on the Inventory Tickets tab.
 - b. After a small delay to gather the data you should see your tally screen. It's divided into two sections: Filter and Grid.
 - i. Filter: Use the filter section to narrow your search by selecting your criteria and clicking [Find]. Clicking [Reset] will clear your search criteria so you can start your search over.

Filter

Ticket Type: Start Date: End Date: Rig:
Ticket #: 2nd Party: Carrier: AFE/PO:
 Show Unposted Charge To: Location:
 Only Unprinted Comment: Product Code: Product Name:

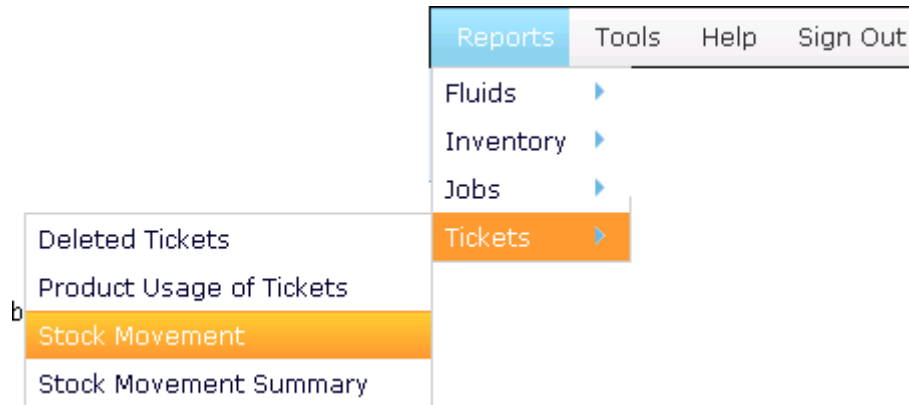
Reset Find Grid Export Page: 1 of 1653 (Click on column header to sort) * Print Selected * Print All (* Action will mark tickets as printed for company.)

- ii. The grid shows a quick summary of the Inventory Tickets. Warehouse names are abbreviated to keep the column short. Click the [View] hyperlink (left-most column) to display the ticket in PDF format. Depending on your browser and version the ticket may be shown in a tab or a separate browser window.
- iii. The grid will show only 100 records at a time and you need to use the Page dropdown in the Filter section to jump to other pages.
- iv. You can sort the grid results by clicking on the column name.
- v. Group Print Features
 1. You can multi-select rows in the table by click on row selector (left most column), holding the SHIFT key then clicking on another row to highlight all rows between.

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2. You can also multi-select rows by clicking on the row selector, holding the CTRL key to highlight rows that are not next to each other in the list.
3. The Print Selected button will generate a single PDF containing all highlighted tickets.
4. The Print All button will generate a PDF with all tickets present on the current page, up to 100 tickets.

5. Reports (browser's upper right corner)



- a. Each report will have its own set of arguments. If required arguments are missed, the application will prompt the user.

Jobs **Warehouse Stock** **Tank Stock** **Inventory Tickets** **Report**

Name: Stock Movement
Description: Shows all Stock Movement for the Warehouse, in the selected date range. Optionally can be filtered by Product.

Company:

Warehouse:

From: To:

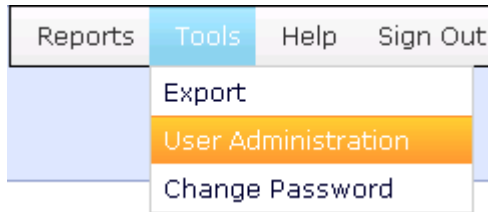
Product:

Include Ticket Date
 Only Products In Stock

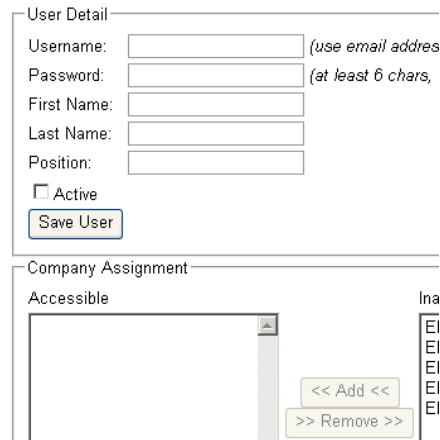
- b. Depending on the report, you'll have the option to view the results as PDF and/or Excel (.xls).

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6. User Administration (under the Tools menu).

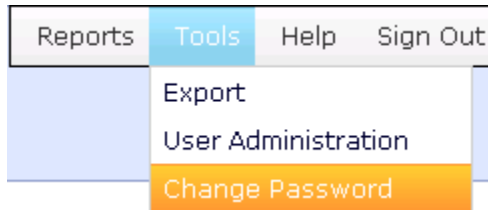


- a. This option is only available to Company Administrators. Use it to manage users within your organization that need access to the Xpress Vendor portal.
- b. For security reason, the users you create will NOT have Company Administrator privileges.



- c. You can restrict the business units your users can see by moving the business units' from the 'Inaccessible' list to the 'Accessible' list, and vice versa.
- d. To disable a user from accessing the web portal, uncheck the Active checkbox and click [Save User].

7. Change Password (under the Tools menu)



- a. It's a good idea to change your password periodically. Our password policy is to use at least 8 characters, and must contain at least 1 letter and 1 number.

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Trouble Shooting:

A list of common issues and the related fixes when using Xpress Vendor.

1. Internet Security Settings
 - a. Description: Depending on your computer security settings, you can get security warnings that block features of the system.
 - i. Examples include an inability to view tickets, etc.
 - b. Solution: Add <https://vendor.xpressinventory.com> to your browser's list of Trusted Sites.
 - i. Internet Explorer: Depending on the version, select Tools (Alt-T) → Internet Options → Security Tab → Trusted Sites → Sites button → then add <https://vendor.xpressinventory.com>.
2. Supported Browser Versions
 - a. Description: Experiencing problems with the User Interface, especially with the Tab's and Filter Interface. This issue can occur with extremely old versions of various browsers that are not supported.
 - b. Solution: Upgrade to a more recent version of your browser. Examples of browsers that should work properly include:
 - i. Internet Explorer 7, 8, 9, 10, +
 - ii. Firefox 13, +, Safari, Chrome
3. Unable to view export zip or Excel.
 - a. In Internet Explorer, there's a setting for auto-prompt for downloads. If false, all you'll see is a "flash" and Excel/zip file. To fix:
 - i. Go to Tools → Internet Options → Security Tab, click on "Custom Level", scroll to "Downloads" and set "Automatic Prompting for File Downloads" to enabled.
4. Unable to View Report or Ticket – Missing Viewer(s)
 - a. Reports and Tickets are files in either in PDF or Excel format.
 - b. PDF Files will require installation of a PDF viewer on your local machine, such as Adobe Acrobat.
 - c. Excel Files will require an application that can view .xls files.
5. Unable to View Report or Ticket – Browser Settings
 - a. If you have the proper viewers installed for PDF and Excel, and clicking to view a Ticket or a Report does "nothing", then the issue is likely restrictive browser settings that are "Blocking Popups".

b. Browser Type

- i. Internet Explorer – Add <https://vendor.xpressinventory.com> to your browser's list of Trusted Sites (see 4b.).
- ii. Safari – Go to "Settings", and uncheck the "Block Pop-Up Windows" option.
- iii. Chrome – Detailed instructions can be found at <https://support.google.com/chrome/answer/95472?hl=en>.

