



VISUALRATEX:
MBS EDI WANTLIST
USER DOCUMENTATION

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1 FTP REQUIREMENTS

VisualRATEX is configured to operate through FTP to the address of ORDERFTP.MBSBOOKS.COM on port 21 using passive mode. Your firewall(s) rule(s) must be adjusted accordingly to accommodate this requirement.

2 SENDING A WANT LIST TO MBS

VisualRATEX-MBS Integration allows you to send want lists to **MBS** through VisualRATEX.

There are two types of want lists you may send:

- **Asap**
- **Bin**

MBS works **Asap** orders once, and sends available quantities within 24 hours.

MBS reworks **Bin** orders daily until the **Rework Until Date** you select. MBS ships each order on the **Ship date** you select.

Important: For **Bin** orders, **Ship dates** must be at least five business days after you send MBS the want list.

Important: For **Bin** orders, **Rework Until Date** must be five business days *before* the order's **Ship date**.

For both **Asap** and **Bin** want list orders, you select the **Percentage** of the want list MBS works.

Warning: Every time a **Bin** order updates with an updated quantity, the addition quantity is recorded as a new line on the purchase order. These quantities are not consolidated in receiving.

Warning: MBS does not transmit cost as part of **VisualRATEX-MBS Integration**. During receiving, you must validate the cost of each item against the delivery log.

Warning: **VisualRATEX-MBS Integration** does not support changing an **Asap** order to a **Bin** order. To change an **Asap** order to a **Bin** order, call MBS to cancel the order. When the **Asap** order has been canceled, create a new **Bin** order in VisualRATEX.

Warning: Quantities that display on **TX > Purchase Order Inquiry - Vendor** may not accurately reflect quantities for orders created with **VisualRATEX-MBS Integration**.

2.1 PURPOSE

To send a want list created in VisualRATEX to MBS with VisualRATEX-MBS integration

2.2 REQUIREMENTS TO PERFORM

- The *name* want list(s) created in VisualRATEX

2.3 PROCEDURE

1. In VisualRATEX, select **Text > Ordering > EDI Processing > Want List Send**.

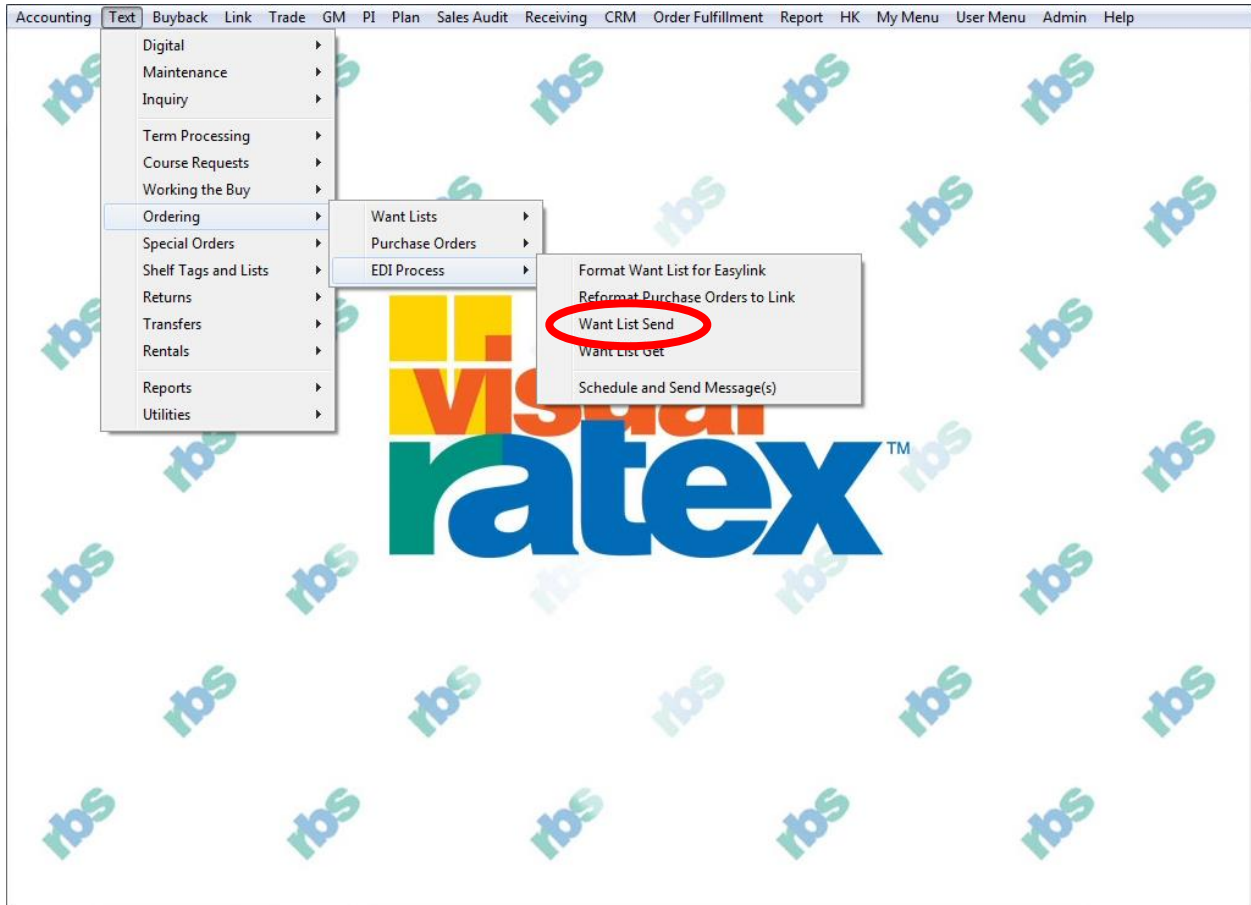


Figure 1 VisualRATEX (Want List Send)

2. In **Service**, select **MBS**.

* Service

* Want List Name

* Store

Retrieve Record

Vendor

Percentage

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

Rework Until Date

* Ship Date

* Purchase Order

Send

Figure 2 VisualRATEX — Want List MBS Send (Service)

3. In **Want List Name**, select the *name* of the want list to send to MBS.

* Service

* **Want List Name**

* Store

Vendor

Percentage

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

Rework Until Date

* Ship Date

* Purchase Order

Figure 3 VisualRATEX — Want List MBS Send (Want List Name)

4. In **Store**, select the *location* to send the shipment to.

* Service MBS MBS

* Want List Name IRENE1 IRENE1

* Store

Retrieve Record

Vendor

Percentage

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

Rework Until Date

* Ship Date

* Purchase Order

Send

Figure 4 VisualRATEX — Want List MBS Send (Store)

Warning: Shipping and billing information cannot be changed using VisualRATEX-MBS integration. Call MBS directly to change shipping and/or billing information. Changing shipping and billing information may require contract changes.

5. Click **Retrieve Record**.

The screenshot displays a web interface for VisualRATEX. At the top, a green header box contains three dropdown menus: '* Service' (MBS MBS), '* Want List Name' (IRENE1 IRENE1), and '* Store' (1 1). Below these is a button labeled 'Retrieve Record', which is circled in red. The main area has a light blue background and contains several input fields: 'Vendor' (two empty boxes), 'Percentage' (one empty box), '* New Used' (a radio button group with options: 0 Default, 1 Used Copies Only, 2 Prefer Used Copies, 3 Prefer New Copies, 4 New Copies Only, 5 Any Grade Available), '* Type' (radio buttons for 'Asap' and 'Bin'), 'Rework Until Date' (one empty box), '* Ship Date' (one empty box), and '* Purchase Order' (one empty box). At the bottom center is a 'Send' button.

Figure 5 VisualRATEX — Want List MBS Send (Retrieve Record)

The **Vendor** populate with the **MBS vendor number (666)** and **MBS**.

* Service: MBS MBS

* Want List Name: IRENE1 IRENE1

* Store: 1 1

Retrieve Record

Vendor: 666 MBS

Percentage: []

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type: Asap Bin

Rework Until Date: []

* Ship Date: []

* Purchase Order: []

Send

Figure 6 VisualRATEX — Want List MBS Send (Vendor)

6. In **Percentage**, type the *percentage* (as a whole number) of the want list MBS works.

Note: If you do not enter a *percentage*, MBS works 100%.

* Service MBS MBS

* Want List Name IRENE1 IRENE1

* Store 1 1

Retrieve Record

Vendor 666 MBS

Percentage

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

Rework Until Date

* Ship Date

* Purchase Order

Send

Figure 7 VisualRATEX — Want List MBS Send (Percentage)

Note: If you enter an invalid **Percentage**, a warning displays.

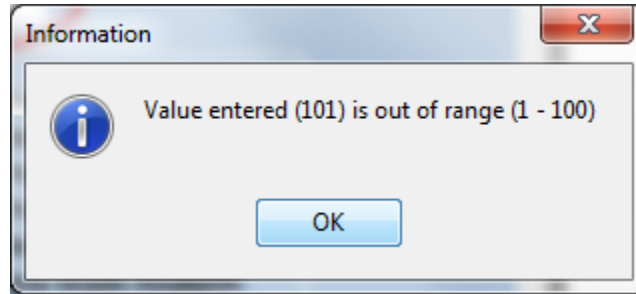


Figure 8 VisualRATEX—Invalid Percentage Warning

7. In **New Used**, select the *book conditions* MBS includes in the order.

* Service MBS MBS

* Want List Name IRENE1 IRENE1

* Store 1 1

Retrieve Record

Vendor 666 MBS

Percentage 50

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

Rework Until Date

* Ship Date

* Purchase Order

Send

Figure 9 VisualRATEX — Want List MBS Send (New Used)

Note: **Default** is specified by your contract with MBS. To change **Default**, you must contact MBS directly. This may require a contract change.

8. In **Type**, select:

- **Asap**, if you want MBS to work the order once and ship on-hand quantities within 24 hours

Or

- **Bin**, if you want the order worked daily until the **Rework Until Date**.

* Service MBS MBS

* Want List Name IRENE1 IRENE1

* Store 1 1

Retrieve Record

Vendor 666 MBS

Percentage 50

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

Rework Until Date

* Ship Date

* Purchase Order

Send

Figure 10 VisualRATEX — Want List MBS Send (Type)

9. If you select:

- **Asap**, type *today's date* in **Ship Date**.

* Service MBS MBS

* Want List Name IRENE1 IRENE1

* Store 1 1

Retrieve Record

Vendor 666 MBS

Percentage 50

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

* Rework Until Date

* Ship Date

* Purchase Order

Send

Figure 11 VisualRATEX — Want List MBS Send (Ship Date)

- **Bin:**
 - a. In **Rework Until Date**, type the *date* MBS stops working the want list.

* Service MBS MBS

* Want List Name IRENE1 IRENE1

* Store 1 1

Retrieve Record

Vendor 666 MBS

Percentage

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

* Rework Until Date

* Ship Date

* Purchase Order

Send

Figure 12 VisualRATEX — Want List MBS Send (Rework Until Date)

Important: **Rework Until Date** must be five business days before the **Ship Date**. If you type an invalid date in **Rework Until Date**, VisualRATEX warns you.

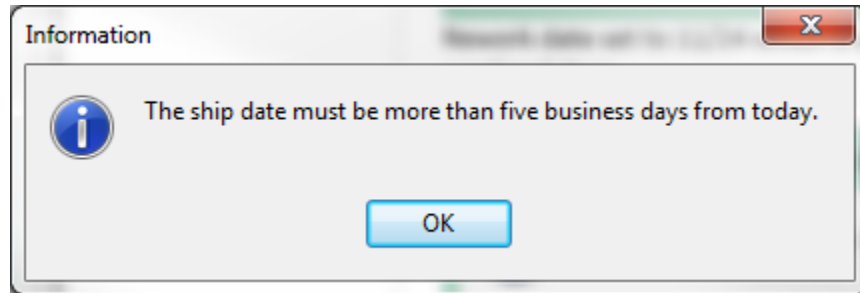


Figure 13 VisualRATEX — Invalid Rework Date Warning

b. In **Ship Date**, type the *date* MBS ships the order.

The screenshot shows a web form for 'Want List MBS Send'. At the top, there is a green header box containing three dropdown menus: '* Service' (MBS MBS), '* Want List Name' (IRENE1 IRENE1), and '* Store' (1 1). Below these is a 'Retrieve Record' button. The main form area is light blue and contains several fields: 'Vendor' (666) and 'MBS', 'Percentage' (50), '* New Used' (radio buttons for 0-5), '* Type' (radio buttons for Asap and Bin), '* Rework Until Date' (09/01/2016), '* Ship Date' (circled in red), and '* Purchase Order'. A 'Send' button is at the bottom.

Figure 14 VisualRATEX — Want List MBS Send (Ship Date)

Important: The **Ship Date** must be at least five business days after you send MBS the **Bin** want list. If you type an invalid **Ship Date**, VisualRATEX warns you.

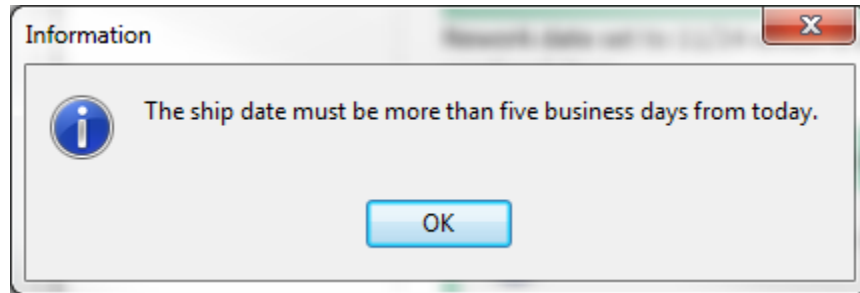


Figure 15 VisualRATEX — Invalid Ship Date Warning

c. In **Purchase Order**:

- Enter a *purchase order number*.
- Or
- Type **n** and press **Enter** to generate a *purchase order number*.

* Service MBS MBS

* Want List Name IRENE1 IRENE1

* Store 1 1

Retrieve Record

Vendor 666 MBS

Percentage 50

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

* Rework Until Date 09/01/16

* Ship Date 09/09/16

* Purchase Order

Send

Figure 16 VisualRATEX — Want List MBS Send (Purchase Order)

Important: Be sure to keep the *purchase order ID*, so you can check its status.

Note: If you type an invalid **Purchase Order**, VisualRATEX warns you.

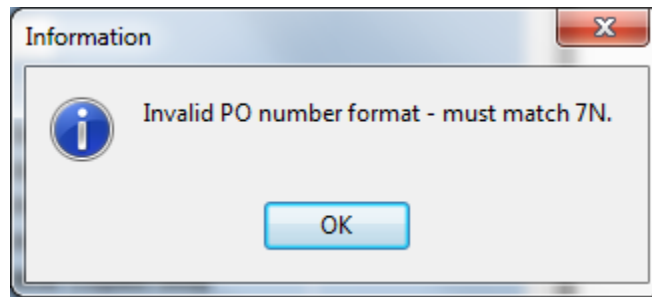


Figure 17 VisualRATEX — Invalid Purchase Order Warning

10. Click **Send**.

* Service MBS MBS

* Want List Name IRENE1 IRENE1

* Store 1 1

Retrieve Record

Vendor 666 MBS

Percentage 50

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

* Rework Until Date 09/01/16

* Ship Date 09/09/16

* Purchase Order 1010707

Send

Figure 18 VisualRATEX — Want List MBS Send (Send)

Wait 3-5 minutes. The **Wait** icon displays (🔄).

When MBS receives the want list, VisualRATEX displays a message indicating the want list was successfully transmitted to MBS.

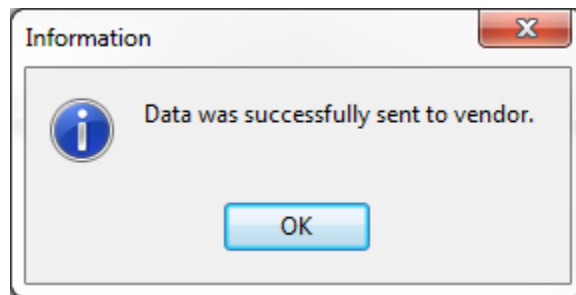


Figure 19 VisualRATEX — Send Successful Message

If VisualRATEX is unable to connect to MBS, the message below displays.

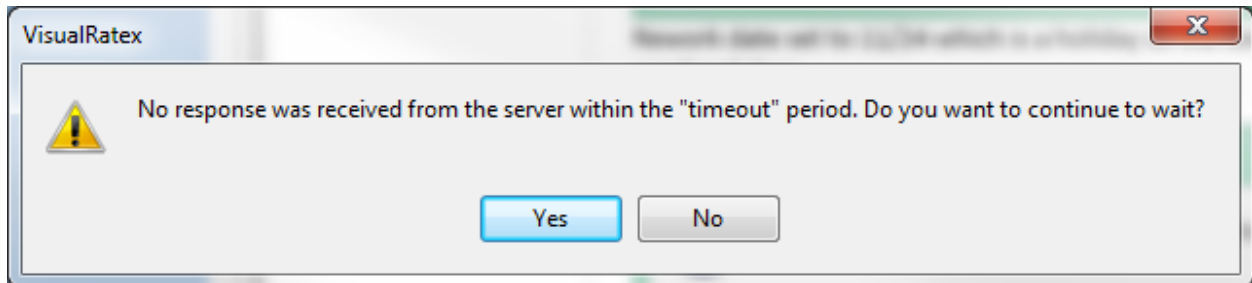


Figure 20 VisualRATEX — Timeout Warning

- To send the update request again, click **Yes**.

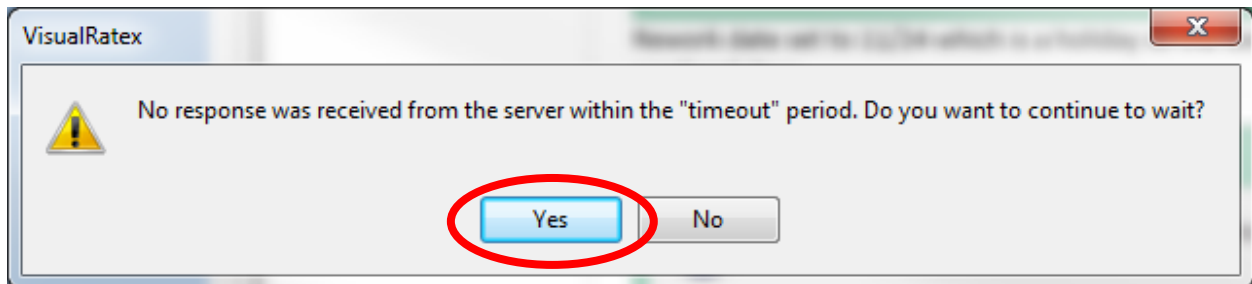


Figure 21 VisualRATEX Timeout Warning (Yes)

Warning: Do not close the window before receiving a response. If you do, VisualRATEX does not send the want list to MBS.

If you attempt to close before VisualRATEX has sent the want list to MBS, the message below displays.

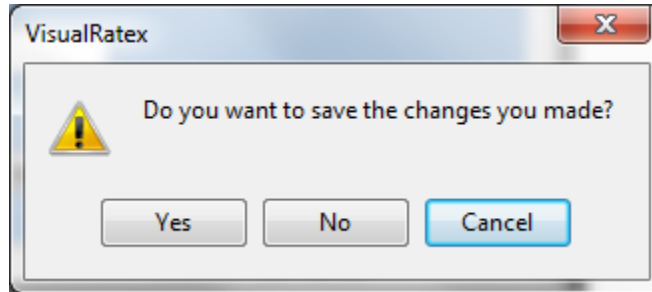


Figure 22 VisualRATEX — Close Warning

3 CHANGING AN MBS WANT LIST SENT WITH VISUALRATEX-MBS

You can add titles and quantities to a want list already sent to **MBS** using **VisualRATEX-MBS integration**.

Warning: You cannot cancel orders, lower quantities on order, or remove titles through VisualRATEX-MBS integration. If you need to do these things, contact MBS directly.

3.1 PURPOSE

To add quantities or titles to an MBS want list

3.2 REQUIREMENTS TO PERFORM

- MBS want list(s) updated in VisualRATEX

Important: To change a want list sent to MBS, the **Rework Until Date** must be *after* today's date.

Warning: Every time a **Bin** order updates with an updated quantity, the addition quantity is recorded as a new line on the purchase order. These quantities are not consolidated in receiving.

Warning: MBS does not transmit cost as part of **VisualRATEX-MBS Integration**. During receiving, you must validate the cost of each item against the delivery log.

Warning: **VisualRATEX-MBS Integration** does not support changing an **Asap** order to a **Bin** order. To change an **Asap** order to a **Bin** order, call MBS to cancel the order. When the **Asap** order has been canceled, create a new **Bin** order in VisualRATEX.

Warning: Quantities that display on **TX > Purchase Order Inquiry - Vendor** may not accurately reflect quantities for orders created with **VisualRATEX-MBS Integration**.

3.3 PROCEDURE

1. In VisualRATEX, select **Text > Ordering > EDI Processing > Want List Send**.

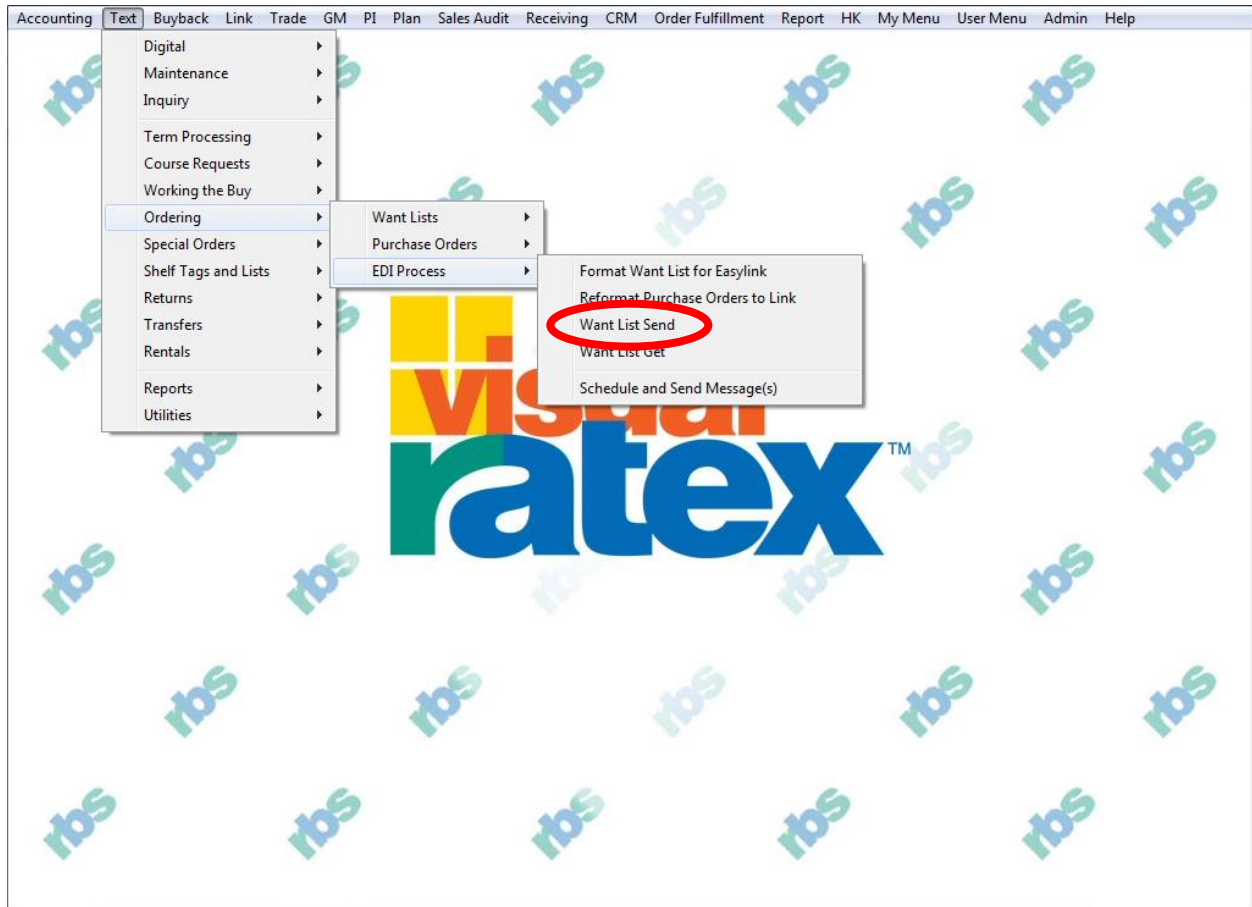


Figure 23 VisualRATEX (Want List Send)

2. In **Service**, select **MBS**.

* Service

* Want List Name

* Store

Retrieve Record

Vendor

Percentage

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

Rework Until Date

* Ship Date

* Purchase Order

Send

Figure 24 VisualRATEX — Want List MBS Send (Service)

3. In **Want List Name**, select the *name* of the modified want list to send to MBS.

* Service

* **Want List Name**

* Store

Vendor

Percentage

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

Rework Until Date

* Ship Date

* Purchase Order

Figure 25 VisualRATEX — Want List MBS Send (Want List Name)

4. In **Store**, select the *location* the order is for.

* Service MBS MBS

* Want List Name DAN1 DAN1

* Store

Retrieve Record

Vendor

Percentage

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

Rework Until Date

* Ship Date

* Purchase Order

Send

Figure 26 VisualRATEX — Want List MBS Send (Store)

5. Click **Retrieve Record**.

The screenshot shows a web form for 'Want List MBS Send'. At the top, there are three dropdown menus: '* Service' with 'MBS MBS' selected, '* Want List Name' with 'DAN1 DAN1' selected, and '* Store' with '1 1' selected. Below these is a button labeled 'Retrieve Record', which is circled in red. The rest of the form is on a light blue background and includes: 'Vendor' with two empty text boxes; 'Percentage' with one empty text box; '* New Used' with a radio button menu containing options: '0 Default', '1 Used Copies Only', '2 Prefer Used Copies', '3 Prefer New Copies', '4 New Copies Only', and '5 Any Grade Available'; '* Type' with radio buttons for 'Asap' and 'Bin'; 'Rework Until Date' with one empty text box; '* Ship Date' with one empty text box; '* Purchase Order' with one empty text box; and a 'Send' button at the bottom.

Figure 27 VisualRATEX — Want List MBS Send (Retrieve Record)

VisualRATEX displays the want list information.

Figure 28 VisualRATEX — Want List MBS Send

6. Edit any of the fields that display, as appropriate:

- **Percentage:** The *percent* (as a whole number) of the want list MBS works
- **New Used:** The *condition* of the books MBS ships
- **Type:**
 - **Asap:** An order that MBS fills once and ships within 24 hours

- **Bin:** An order MBS holds until the **Ship Date**. MBS works the order daily until the **Rework Until Date**
- **Rework Until Date:** The *date* when MBS stops reworking the want list (for **Bin** orders only)

Important: The **Rework Until Date** must be five or more business days *before* the **Ship Date**.

- **Ship Date:** The *date* MBS sends the order

Important: The **Ship Date** must be five or more business days *after* today's date.

- **Purchase Order:** The *purchase order number*

7. Click **Send**.

* Service MBS MBS

* Want List Name DAN1 DAN1

* Store 1 1

Retrieve Record

Vendor 666 MBS

Percentage 50

* New Used

- 0 Default
- 1 Used Copies Only
- 2 Prefer Used Copies
- 3 Prefer New Copies
- 4 New Copies Only
- 5 Any Grade Available

* Type Asap Bin

* Rework Until Date 09/01/16

* Ship Date 09/09/16

* Purchase Order 1010708

Send

Figure 29 VisualRATEX — Want List MBS Send (Send)

Wait 3-5 minutes. The **Wait** icon displays (🔄).

When transmission is successful, VisualRATEX displays a message indicating the want list was transmitted to MBS.

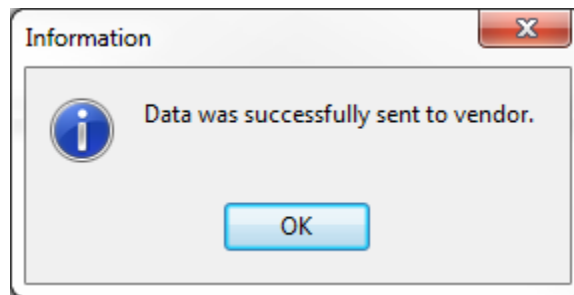


Figure 30 VisualRATEX — Send Successful Message

If VisualRATEX is unable to contact MBS, the message below displays.

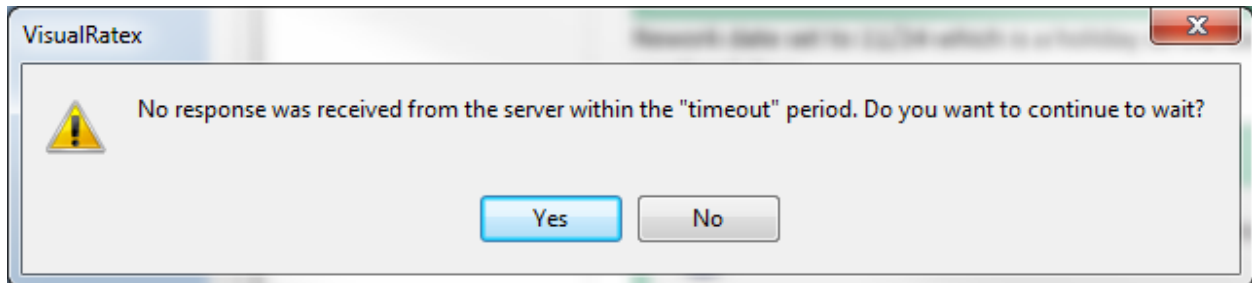


Figure 31 VisualRATEX — Timeout Warning

Warning: Do not close the window before receiving a response. If you do, VisualRATEX does not send the want list to MBS.

If you attempt to close before VisualRATEX has sent the want list to MBS, the message below displays.

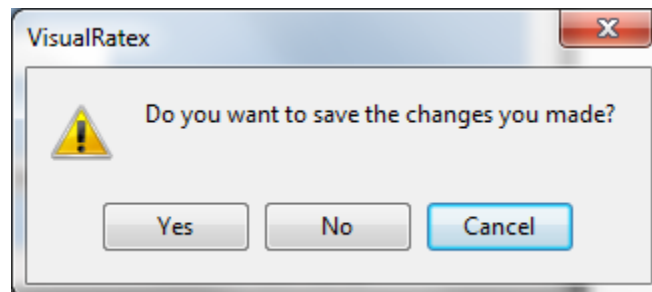


Figure 32 VisualRATEX — Close Warning

4 UPDATING MBS WANT LIST STATUS

MBS updates **Bin** want list orders daily.

To update orders in VisualRATEX with this information, use the procedure below.

Note: For **Asap** orders, MBS updates purchase order status once, within 10 minutes of transmitting a want list.

Warning: Every time a **Bin** order updates with an updated quantity, the addition quantity is recorded as a new line on the purchase order. These quantities are not consolidated in receiving.

Warning: MBS does not transmit cost as part of **VisualRATEX-MBS Integration**. During receiving, you must validate the cost of each item against the delivery log.

Warning: **VisualRATEX-MBS Integration** does not support changing an **Asap** order to a **Bin** order. To change an **Asap** order to a **Bin** order, call MBS to cancel the order. When the **Asap** order has been canceled, create a new **Bin** order in VisualRATEX.

Warning: Quantities that display on **TX > Purchase Order Inquiry - Vendor** may not accurately reflect quantities for orders created with **VisualRATEX-MBS Integration**.

4.1 PURPOSE

To update MBS purchase orders in VisualRATEX with up-to-date quantities on order

4.2 REQUIREMENTS TO PERFORM

- Pending MBS want list(s)

4.3 PROCEDURE

1. In VisualRATEX, click **Text > Ordering > EDI Process > Want List Get.**

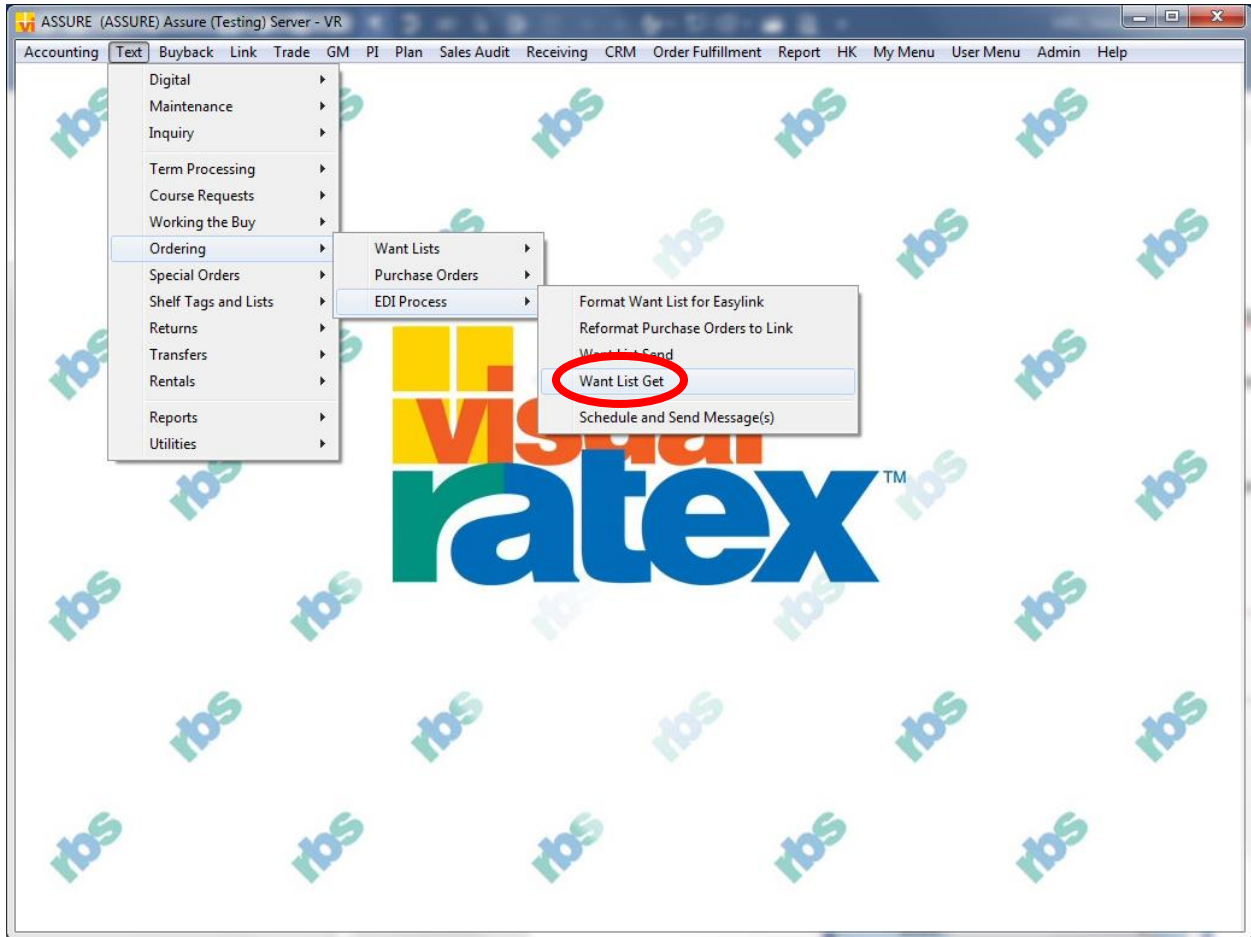


Figure 33 VisualRATEX (Want List Get)

Want List MBS Get displays.

The screenshot shows a user interface for 'Want List MBS Get'. At the top, there is a green header bar containing a dropdown menu labeled '* Service' with 'MBS' selected. Below the header is a large blue area. In the center of this area, there is a dropdown menu labeled '* Store' which is currently empty. Below the 'Store' dropdown is a white button with the text 'Get'.

Figure 34 VisualRATEX — Want List MBS Get

2. In **Service**, select **MBS** and press *Enter*.

3. If you have multiple stores, in **Store**, select the *location* associated with the want lists you are updating.

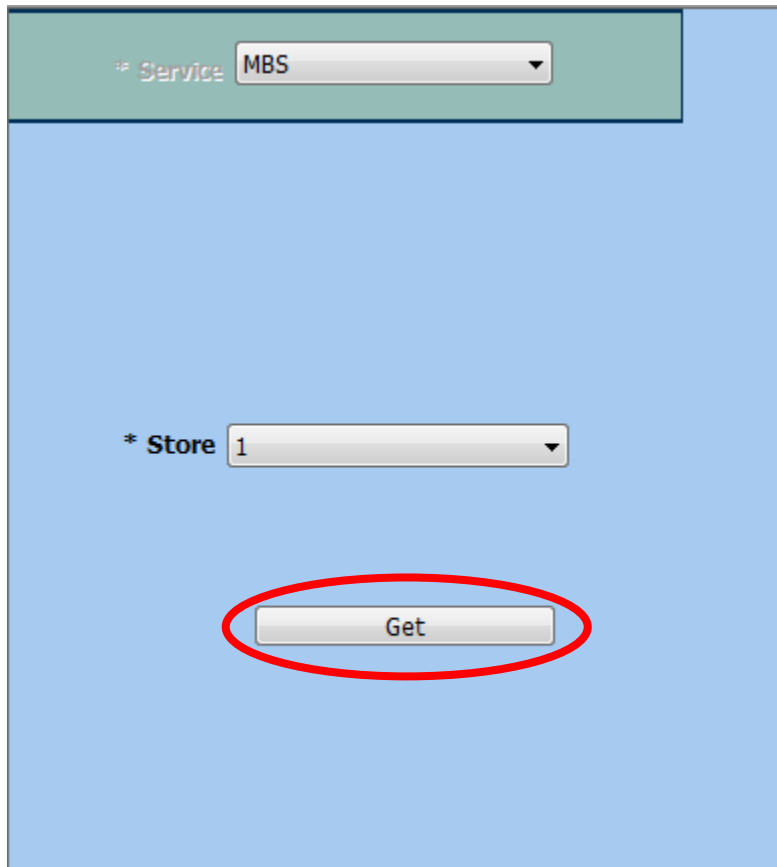
* Service MBS

* Store 1

Get

Figure 35 VisualRATEX — Want List MBS Get (Store)

4. Click **Get**.



The screenshot shows a web application interface with a light blue background. At the top, there is a green header bar containing a dropdown menu labeled '* Service' with 'MBS' selected. Below this, there is another dropdown menu labeled '* Store' with '1' selected. In the center of the page, a button labeled 'Get' is highlighted with a red oval.

Figure 36 VisualRATEX — Want List MBS Get (Get)

If MBS updates orders, the message below displays.

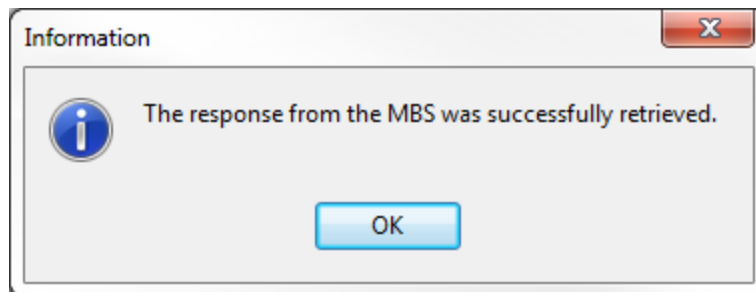


Figure 37 VisualRATEX—MBS Want List Updated Message

If there are no orders to update, the message below displays.

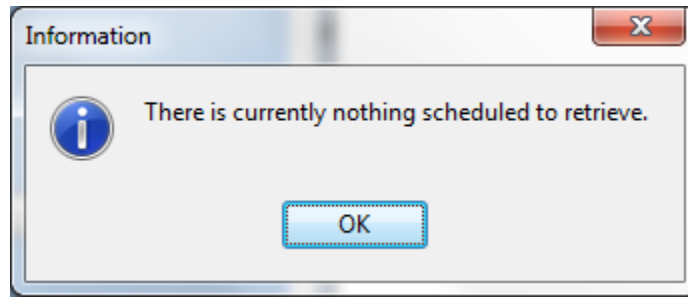


Figure 38 VisualRATEX — No MBS Order Message

Important: If VisualRATEX is unable to transmit the update request, the message below displays.

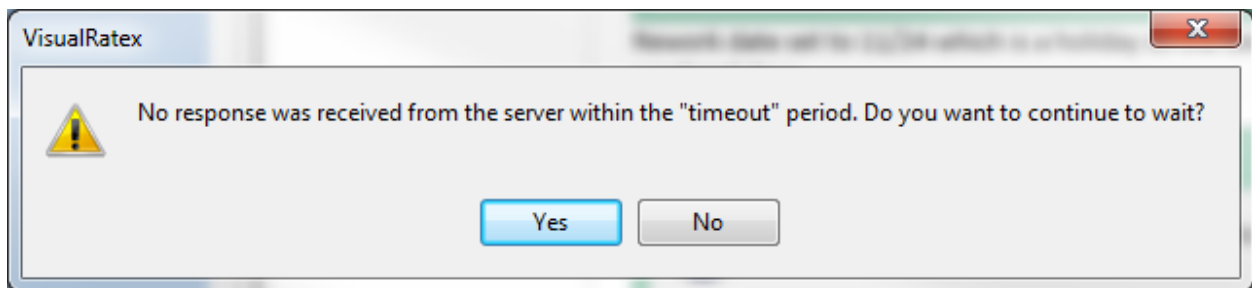


Figure 39 VisualRATEX — Timeout Warning

- To send the update request again, click **Yes**.

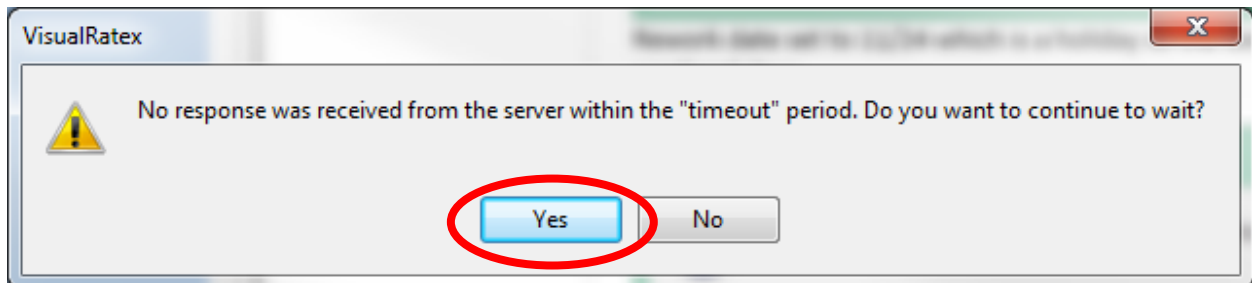


Figure 40 VisualRATEX Timeout Warning (Yes)

5. Check the purchase order according to today's process.