



Vendor 360 Administrative Function

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Revised 04/13/2022

The administrator has the ability to create additional users, subcontractors, and third party accounts within Vendor 360. Password, ABC Number, and permission management is also a function of the administrator within your organization.

Subcontractors will only see the Maintenance and/or Inspection work orders that are manually assigned from a Vendor to the Subcontractor.

Users and office staff members will be able to see all Maintenance and/or Inspection work orders that have been assigned to a Vendor. Provide your Users with necessary permission levels necessary to complete their tasks.

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Administration Features

Managing Passwords

Administrators have the ability to create additional users, subcontractors, and third party web services. They also have password and permission management functions within Vendor 360.

Access to Vendor 360 is automatically revoked for users that have not logged into the system within 14 days. The revocation process runs nightly with users being deactivated when the 14 days of inactivity has occurred. Accounts will also be deactivated after three-failed log in attempts. Vendors can reactivate their account by answering the security questions and then resetting the password.

If Vendors do not remember the answers to the security questions, user will be able to reset their passwords by utilizing the Password Reset function located on the login screen of Vendor 360. This function is only available if the user has submitted security question answers within the Vendor 360 system. The security questions are set up when the user first logs into the Vendor 360 application for the first time.

If the main account holder needs their account to be reactivated or password changed due to not remembering the answers to the security questions, contact the IT Liaison via the [IT ticketing system](#).

Note: When contacting the IT Liaison to reactivate an account or change a password, the individual requesting the change will need to answer security questions that were set up when on boarding with MCS.

Helpful Tips

- Users marked as a Web Service User can NOT access Vendor 360. **DO NOT set up the Owners Account as the Third Party Web Service User.**
- Permissions control what users can and cannot do within the system
 - When assigning permissions, err on the side of caution. You can always provide additional permissions if someone cannot perform a task, but it is harder to remove permissions once they have them.
 - ADMIN permissions should not be given to everyone. ADMIN permissions give access to confidential information. It is recommended that more than one person have ADMIN permissions to assist with password resets, activating and deactivating accounts.
- Sub-contractors with ADMIN permissions does not mean that they have access to the parent vendors ADMIN information
 - Example: Vendor 200 (Parent) assigns sub-contractor 200-1 (sub-contractor) ADMIN permission. 200-1 can set up users and sub-contractors similar to how the parent sets up accounts, but it does not impact the parents users or sub-contractor accounts.
- It is important to remember to deactivate accounts once a user/sub-contractor no longer works for your company.
 - When deactivating accounts, it is recommended to remove all permissions but one. Be sure to select a permission that does not provide access to confidential information (i.e. Misc -- Add Inspection Notes, this is a right click function and in order for a user to use these feature they would need additional permissions)
 - Update the Access Level from Full Access to No Access when deactivating subcontractor's accounts. If you do not change the Access Level to No Access the subcontract will still populate in the 'Assign Work Order to Subcontractor' screen.
- Once users and sub-contractors are added to the system, they cannot be deleted. If they are not to be used, we recommend changing the last name to DNU (do not use).

Approval Process

All mobile users will need to be approved by the Compliance Team prior to logging into the mobile app. If the mobile user is also a Vendor 360 user or subcontractor, the vendor 360 account will be active and available for use immediately. Be sure to keep this in mind when on-boarding new contractors who will need to utilize the mobile app to check-in. Allow 24 hours for the mobile user to be reviewed.

- Once user is created, it will show as pending in the user grid
- Compliance Team will review the mobile user information
 - ABC Number
 - IC Level
 - Expiration Date
 - Screenshot of ABC Information
- Compliance will then approve or deny the user
- If the user is approved, they can begin utilizing the mobile app to check-in. The status can be viewed in the user grid and an email is sent to the email address associated with the user to notify them their user has been approved.
 - If a user has been approved, but the expiration date has past, the user will no longer be able to access the mobile app even though the account shows active
 - Update the user information and resubmit for approval
- If the user is denied, the user will not be able to utilize the mobile app to check-in. The status can be viewed in the user grid. An email will also be sent to the email address associated with the user to notify them their user has been denied and will contain a denial reason.
 - If the user has been denied, make the necessary corrections and resubmit

Creating Users & Subcontractors

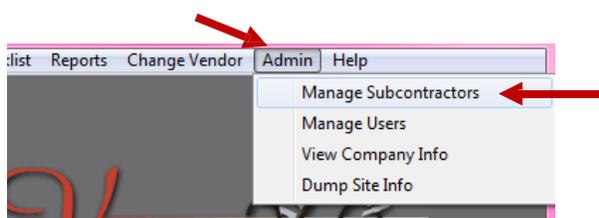
Manage Subcontractors

Vendor 360

Do you have a subcontractor who only needs access to work orders you assign to them in Vendor 360, but not the MCS Verify site? If so, they should be set up a subcontractor in Vendor 360.

- Users set up as subcontractors in Vendor 360 ONLY have access to work orders that are assigned to them
- Subcontractors who are granted Admin permissions allow the subcontractor to create their own users and subcontractors. They will not have access to the parent vendor's users or subcontractors.

Step 1: Getting to Manage Subcontractors screen



Select **ADMIN** from the title bar and choose **Manage Subcontractors** from the drop down menu.

The Manage **Subcontractor** screen will open.

Step 2: Select the Application that the Subcontractor needs access to

Check the Vendor 360 checkbox within the applications window. Only the information that is required to be filled in for a Vendor 360 Subcontractor will stay active.

Vendor 360 - Manage Subcontractors

Current Subcontractors Show All 9 Sub Contractors (Active and Inactive)

Contractor #	Company	Contact First Name	Contact Last Name	ABC #	Status	Date Expires	Active
1093-1	FAKE CONTRACTOR	JOE	SMITH				<input checked="" type="checkbox"/>

Company Name:

First Name:

Last Name:

Address 1:

Address 2:

City:

State:

Zip Code:

Email:

Phone:

Mobile:

Access Level: Full Access

Applications

- Mobile App
- Vendor 360

Permissions

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- ADMIN-Storage Facility Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages
- File->Messaging System
- Inspections - AP Batches - Research Inspection
- Inspections - AP Batches - Review Current Batch
- Inspections - AP Batches - Review Processed Batch
- Inspections - Create/Modify Vacancy Checklist
- Inspections - Delete Vacancy Checklist
- Inspections - Enter Loss Draft Inspection Results
- Inspections - Enter Results
- Inspections - Print Inspection
- Inspections - Save Results
- Inspections - Upload Photos

Reset Password Add Clear Screen Close

Step 3: Create Profile

Subcontractors must all have their own individual login; no two Subcontractors can login under the same account. The Access Level is automatically set to Full Access. Users with Admin permissions can update the Access Level after the subcontractor has been activated.

Vendor 360 - Manage Subcontractors

Current Subcontractors Show All 9 Sub Contractors (Active and Inactive)

Contractor #	Company	Contact First Name	Contact Last Name	ABC #	Status	Date Expires	Active
1093-1	FAKE CONTRACTOR	JOE	SMITH				<input checked="" type="checkbox"/>

Company Name:

First Name:

Last Name:

Address 1:

Address 2:

City:

State:

Zip Code:

Email:

Phone:

Mobile:

Access Level: Full Access

Applications

- Mobile App
- Vendor 360

Permissions

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
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- Inspections - Save Results
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Reset Password Add Clear Screen Close

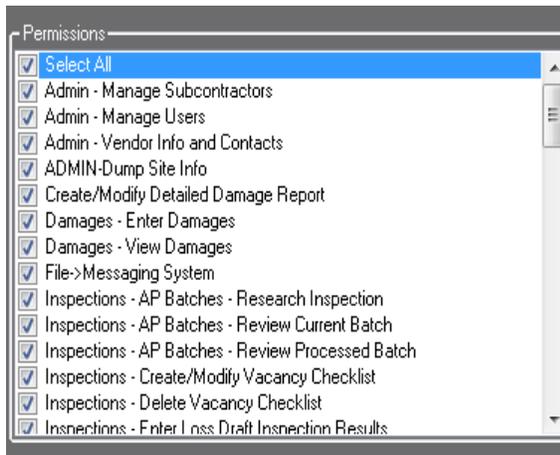
Step 4: Assign Username; Activate the Subcontractor's Account

Enter the subcontractor's username and check the Subcontractor is Active box. If a subcontractor locks themselves out of vendor 360, the "User is Active" checkmark will disappear. To reactivate the sub, recheck the "User is Active" and select "Update".



The screenshot shows a form titled "Individual User". It has a "User Name:" label followed by a text input field. Below this is a checkbox labeled "User Is Active". A red arrow points to the checkbox, indicating it should be checked.

Step 5: Select the Subcontractor Permissions



The screenshot shows a list of permissions under the heading "Permissions". The following items are checked with a checkmark in a box:

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages
- File->Messaging System
- Inspections - AP Batches - Research Inspection
- Inspections - AP Batches - Review Current Batch
- Inspections - AP Batches - Review Processed Batch
- Inspections - Create/Modify Vacancy Checklist
- Inspections - Delete Vacancy Checklist
- Inspections - Enter Loss Draft Inspection Results

Read through ALL Subcontractor permissions carefully. Check off the all the permissions that the Subcontractors that will need to have access to, in order for them to properly operate within Vendor 360.

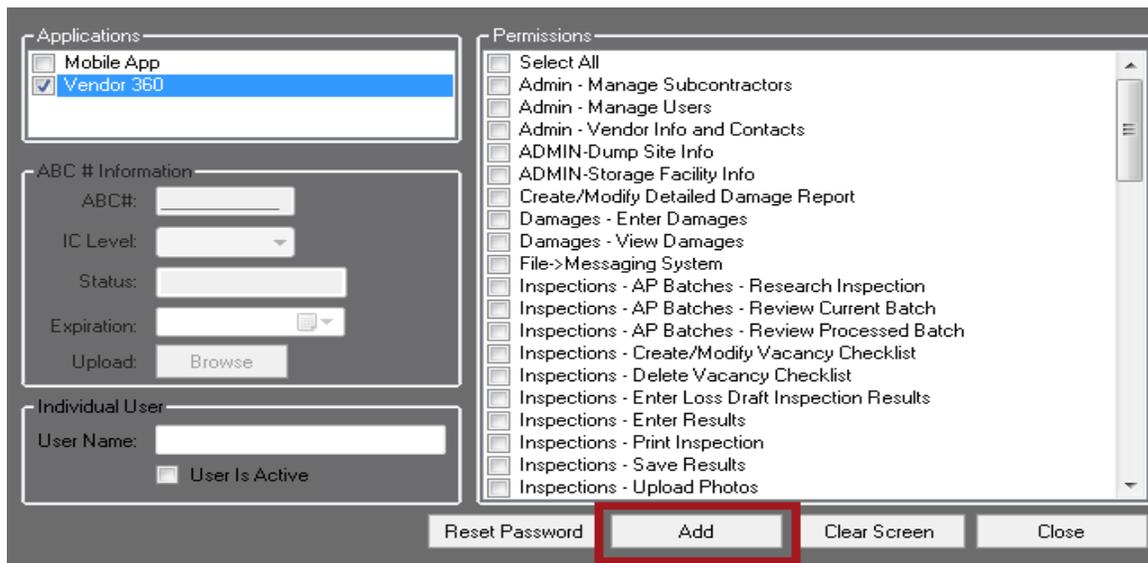
Be sure to read through each one, if your sub needs to ENTER results they also need to have the permissions to VIEW results.



Two permissions are highlighted in a black box:

- Inspections - Enter Results
- Inspections - View Results

Step 6: Add New Subcontractor



The screenshot shows the "Add New Subcontractor" form. It has several sections:

- Applications:** A list with "Mobile App" and "Vendor 360" (checked).
- ABC # Information:** Fields for "ABC#:", "IC Level:", "Status:", "Expiration:", and an "Upload:" button with a "Browse" link.
- Individual User:** A "User Name:" field and a "User Is Active" checkbox.
- Permissions:** A list of permissions, all of which are currently unchecked.
- Buttons:** "Reset Password", "Add" (highlighted with a red box), "Clear Screen", and "Close".

By selecting Add the system will auto generate a Subcontractor Vendor Number which will be used by the subcontractor when they log into Vendor 360 which can be found in the Current Subcontractor grid.

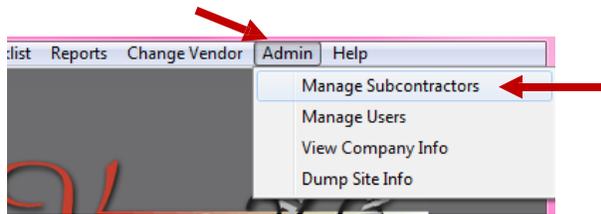
When a new subcontractor is created in the system two automated emails will be sent to the email address associated with the account from mcs360email@mcs360.com. The first email is a welcome email that will contain the subcontractor's vendor number (i.e. 200-1) and the username that was set up. The second email will contain a confirmation hyperlink which will direct the subcontractor to create their password. **The confirmation hyperlink is active for 24 hours after clicking the Create button.**

Mobile App & Vendor 360

Do you have a subcontractor who only needs access to work orders you assign to them in Vendor 360 and the MCS Verify site? If so, they should be set up as a mobile app and vendor 360 user.

- Remember subcontractors for vendor 360 can view only work orders that are assigned to their vendor 360 account
- MCS Verify users require an ABC number
- To access the [MCS Verify site](#), users need to access the MCS Verify website. See [Memo #1630: MCS Verify Website Release](#) for more information regarding the website.

Step 1: Getting to Manage Subcontractors screen

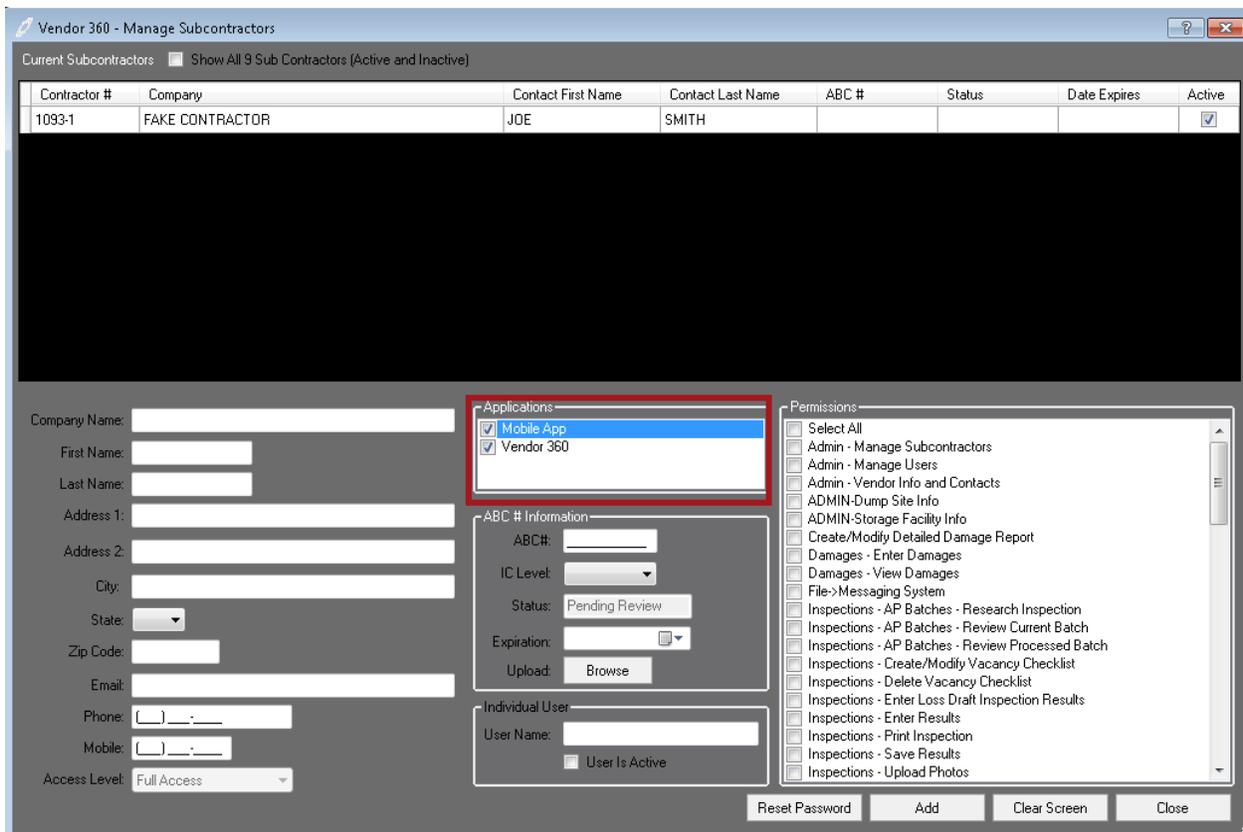


Select **ADMIN** from the title bar and choose **Manage Subcontractors** from the drop down menu.

The Manage **Subcontractor** screen will open.

Step 2: Select the Application that the Subcontractor needs access to

Check the Mobile App & Vendor 360 checkbox within the applications window. Only the information that is required to be filled in for a Vendor 360 Subcontractor will stay active.

A screenshot of the 'Vendor 360 - Manage Subcontractors' application window. The window title is 'Vendor 360 - Manage Subcontractors'. Below the title bar, there is a table of 'Current Subcontractors' with columns for Contractor #, Company, Contact First Name, Contact Last Name, ABC #, Status, Date Expires, and Active. The first row shows Contractor # 1093-1, Company FAKE CONTRACTOR, Contact First Name JOE, Contact Last Name SMITH, and Active checked. Below the table is a form for adding a new subcontractor. The 'Applications' section is highlighted with a red box and contains two checked checkboxes: 'Mobile App' and 'Vendor 360'. Other sections include 'Company Name', 'First Name', 'Last Name', 'Address 1', 'Address 2', 'City', 'State', 'Zip Code', 'Email', 'Phone', 'Mobile', 'Access Level', 'ABC # Information' (with fields for ABC#, IC Level, Status, Expiration, and Upload), and 'Individual User' (with fields for User Name and a 'User Is Active' checkbox). A 'Permissions' list is also visible on the right side of the form. At the bottom of the form are buttons for 'Reset Password', 'Add', 'Clear Screen', and 'Close'.

Step 3: Create Profile

Subcontractors must all have their own individual login; no two Subcontractors can login under the same account. The Access Level is automatically set to Full Access. Users with Admin permissions can update the Access Level after the subcontractor has been activated.

Contractor #	Company	Contact First Name	Contact Last Name	ABC #	Status	Date Expires	Active
1093-1	FAKE CONTRACTOR	JOE	SMITH				<input checked="" type="checkbox"/>

Step 4: Assign Username; Activate the Subcontractor's Account

Check the Subcontractor is Active box

Individual User
User Name:
 User Is Active

Step 5: Select the Subcontractor Permissions

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages
- File->Messaging System
- Inspections - AP Batches - Research Inspection
- Inspections - AP Batches - Review Current Batch
- Inspections - AP Batches - Review Processed Batch
- Inspections - Create/Modify Vacancy Checklist
- Inspections - Delete Vacancy Checklist
- Inspections - Enter Loss Draft Inspection Results

Read through ALL Subcontractor permissions carefully. Check off the all the permissions that the Subcontractors will need to have access to, in order for them to properly operate within Vendor 360.

Be sure to read through each one, if your sub needs to ENTER results they also need to have the permissions to VIEW results.

- Inspections - Enter Results
- Inspections - View Results

Step 6: Update ABC# Information; Upload Screenshot of Aspen Grove site with ABC

Contractor #	Company	Contact First Name	Contact Last Name	ABC #	Status	Date Expires	Active
1093-1	FAKE CONTRACTOR	JOE	SMITH				<input checked="" type="checkbox"/>

Company Name: _____
First Name: _____
Last Name: _____
Address 1: _____
Address 2: _____
City: _____
State: _____
Zip Code: _____
Email: _____
Phone: (____) ____-____
Mobile: (____) ____-____
Access Level: Full Access

Applications:
 Mobile App
 Vendor 360

ABC # Information:
ABC#: _____
IC Level: _____
Status: Pending Review
Expiration: _____
Upload: Browse

Individual User:
User Name: _____
 User Is Active

Permissions:
 Select All
 Admin - Manage Subcontractors
 Admin - Manage Users
 Admin - Vendor Info and Contacts
 ADMIN-Dump Site Info
 ADMIN-Storage Facility Info
 Create/Modify Detailed Damage Report
 Damages - Enter Damages
 Damages - View Damages
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 Inspections - AP Batches - Research Inspection
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 Inspections - Delete Vacancy Checklist
 Inspections - Enter Loss Draft Inspection Results
 Inspections - Enter Results
 Inspections - Print Inspection
 Inspections - Save Results
 Inspections - Upload Photos

Reset Password Add Clear Screen Close

Step 7: Add New Subcontractor

Applications:
 Mobile App
 Vendor 360

ABC # Information:
ABC#: _____
IC Level: _____
Status: Pending Review
Expiration: _____
Upload: Browse

Individual User:
User Name: _____
 User Is Active

Permissions:
 Select All
 Admin - Manage Subcontractors
 Admin - Manage Users
 Admin - Vendor Info and Contacts
 ADMIN-Dump Site Info
 ADMIN-Storage Facility Info
 Create/Modify Detailed Damage Report
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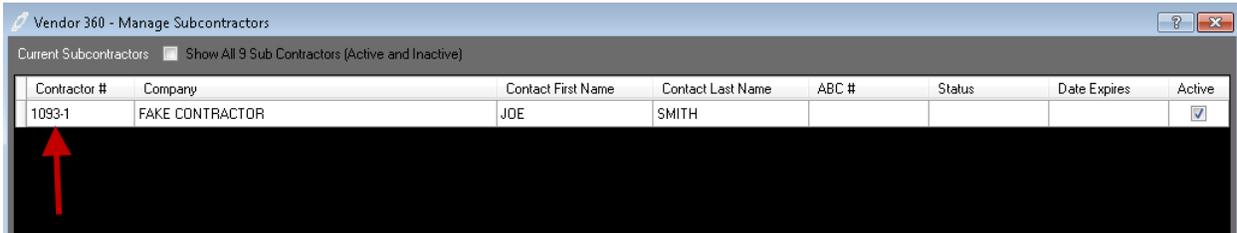
Reset Password **Add** Clear Screen Close

By selecting Add the system will auto generate a Subcontractor Vendor Number which will be used by the subcontractor when they log into Vendor 360 which can be found in the Current Subcontractor grid.

When a new subcontractor is created in the system two automated emails will be sent to the email address associated with the account from mcs360email@mcs360.com. The first email is a welcome email that will contain the subcontractor's vendor number (i.e. 200-1) and the username that was set up. The second email will contain a confirmation hyperlink which will direct the subcontractor to create their password. **The confirmation hyperlink is active for 24 hours after clicking the Create button.**

Current Subcontractor Grid

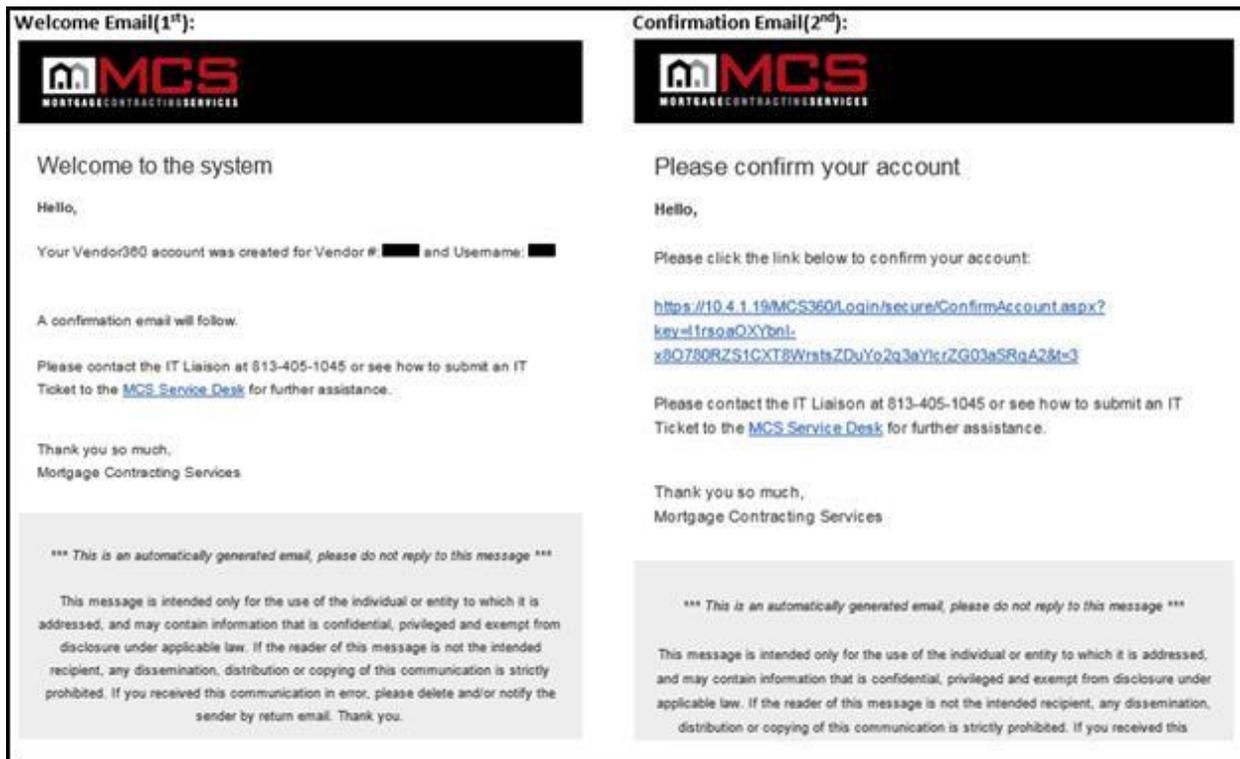
The Subcontractors Sub-Vendor number will auto generate in the Current Subcontractor grid.



Contractor #	Company	Contact First Name	Contact Last Name	ABC #	Status	Date Expires	Active
1093-1	FAKE CONTRACTOR	JOE	SMITH				<input checked="" type="checkbox"/>

Assignment of Sub-Vendor Number and Username

When a new subcontractor is created in the system two automated emails will be sent to the email address associated with the account from mcs360email@mcs360.com. The first email is a welcome email that will contain the subcontractor's vendor number (i.e. 200-1) and the username that was set up. The second email will contain a confirmation hyperlink which will direct the subcontractor to create their password. **The confirmation hyperlink is active for 24 hours after clicking the Create button.**



Welcome Email(1st):

Confirmation Email(2nd):

Welcome to the system

Hello,

Your Vendor360 account was created for Vendor # [REDACTED] and Username: [REDACTED]

A confirmation email will follow.

Please contact the IT Liaison at 813-405-1045 or see how to submit an IT Ticket to the [MCS Service Desk](#) for further assistance.

Thank you so much,
Mortgage Contracting Services

*** This is an automatically generated email, please do not reply to this message ***

This message is intended only for the use of the individual or entity to which it is addressed, and may contain information that is confidential, privileged and exempt from disclosure under applicable law. If the reader of this message is not the intended recipient, any dissemination, distribution or copying of this communication is strictly prohibited. If you received this communication in error, please delete and/or notify the sender by return email. Thank you.

Please confirm your account

Hello,

Please click the link below to confirm your account:

<https://10.4.1.19/MCS360/Login/secure/ConfirmAccount.aspx?key=1frsqQXYbnl-y8Q780RZS1CXT8WratsZDuYo2a3eYicrZG03eSRnA2&t=3>

Please contact the IT Liaison at 813-405-1045 or see how to submit an IT Ticket to the [MCS Service Desk](#) for further assistance.

Thank you so much,
Mortgage Contracting Services

*** This is an automatically generated email, please do not reply to this message ***

This message is intended only for the use of the individual or entity to which it is addressed, and may contain information that is confidential, privileged and exempt from disclosure under applicable law. If the reader of this message is not the intended recipient, any dissemination, distribution or copying of this communication is strictly prohibited. If you received this

Note: Passwords expire after 90 days. Password must be a minimum of 8 characters long with at least 1 uppercase, 1 lowercase, and 1 number. Vendor 360 passwords cannot be the same as one of the previous 5 passwords.

Status Column in the Subcontractor Grid

The status column populates the status of the mobile user account.

- Pending: Submitted to MCS for review
- Approved: Mobile user has been approved
- Denied: Mobile user did not pass MCS' review. Reference email sent for denial reason.

Date Expires Column in the Subcontractor Grid

This is where the date the ABC number expired will populate. If ABC number is expired, user will not be able to check-in. Keep in mind it is your responsibility to track expiration dates and update users with new expiration dates to be reviewed by MCS.

Active Column in the Subcontractor Grid

The Active column will have a checkmark only if the subcontractors Vendor 360 application is active.

If you are a Mobile App and Vendor 360 subcontractor user and the Vendor 360 account is deactivated, your mobile app user will not populate in the User grid.

Check the Show All checkbox in the upper left corner to show all subcontractor accounts. Locate the deactivated subcontractor account to reactivate.

Editing Subcontractor Accounts

Step 1: Select a Current Subcontractor

The screenshot shows the 'Vendor 360 - Manage Subcontractors' application window. At the top, there is a checkbox for 'Show All 9 Sub Contractors (Active and Inactive)'. Below this is a table with the following columns: Contractor #, Company, Contact First Name, Contact Last Name, ABC #, Status, Date Expires, and Active. The first row is highlighted in blue and contains the following data: Contractor # 1093-1, Company FAKE CONTRACTOR, Contact First Name JOE, Contact Last Name SMITH, ABC #, Status Pending Review, Date Expires, and Active (checked).

Below the table is a detailed edit form for the selected subcontractor. The form is divided into several sections:

- Company Information:** Company Name: FAKE CONTRACTOR, First Name: JOE, Last Name: SMITH, Address 1: 123 MAPLE STREET, Address 2: (empty), City: TAMPA, State: FL, Zip Code: 33609, Email: RICHARD.MARTIN@MCSNOW.COM, Phone: (empty), Mobile: (empty), Access Level: Full Access.
- Applications:** A list of applications with checkboxes: Mobile App (checked), Vendor 360 (checked).
- ABC # Information:** ABC#: FL123456789, IC Level: JCD1, Status: Pending Review, Expiration: 11/ 7/2017, Upload: Browse.
- Individual User:** User Name: Joe, User Is Active (checked).
- Permissions:** A list of permissions with checkboxes: Select All (checked), Admin - Manage Subcontractors (checked), Admin - Manage Users (checked), Admin - Vendor Info and Contacts (checked), ADMIN-Dump Site Info (checked), ADMIN-Storage Facility Info (checked), Create/Modify Detailed Damage Report (checked), Damages - Enter Damages (checked), Damages - View Damages (checked), File->Messaging System (checked), Inspections - AP Batches - Research Inspection (checked), Inspections - AP Batches - Review Current Batch (checked), Inspections - AP Batches - Review Processed Batch (checked), Inspections - Create/Modify Vacancy Checklist (checked), Inspections - Delete Vacancy Checklist (checked), Inspections - Enter Loss Draft Inspection Results (checked), Inspections - Enter Results (checked), Inspections - Print Inspection (checked), Inspections - Save Results (checked), Inspections - Upload Photos (checked).

At the bottom of the form are buttons for 'Reset Password', 'Update', 'Clear Screen', and 'Close'.

Step 2: Edit Subcontractor Profile

Edits to the contact and permission fields can be made at this time. Select the permissions needed as applicable to the Subcontractor.

The screenshot shows the 'Vendor 360 - Manage Subcontractors' application window. At the top, there is a table with columns: Contractor #, Company, Contact First Name, Contact Last Name, ABC #, Status, Date Expires, and Active. The first row contains: 1093-1, FAKE CONTRACTOR, JOE, SMITH, (blank), (blank), (blank), and a checked box. Below the table is a form for editing the contractor's profile. The form is divided into several sections: Company Name (FAKE CONTRACTOR), First Name (JOE), Last Name (SMITH), Address 1 (123 MAPLE STREET), Address 2 (blank), City (TAMPA), State (FL), Zip Code (33609), Email (RICHARD.MARTIN@MCSNOW.COM), Phone (blank), Mobile (blank), and Access Level (Full Access). To the right of the form are three sections: Applications (Mobile App and Vendor 360, both checked), ABC # Information (ABC#, IC Level, Status: Pending Review, Expiration, Upload: Browse), and Individual User (User Name: Joe, User Is Active checked). On the far right is a large list of permissions with checkboxes, including 'Select All', 'Admin - Manage Subcontractors', 'Admin - Manage Users', 'Admin - Vendor Info and Contacts', 'ADMIN-Dump Site Info', 'ADMIN-Storage Facility Info', 'Create/Modify Detailed Damage Report', 'Damages - Enter Damages', 'Damages - View Damages', 'File->Messaging System', 'Inspections - AP Batches - Research Inspection', 'Inspections - AP Batches - Review Current Batch', 'Inspections - AP Batches - Review Processed Batch', 'Inspections - Create/Modify Vacancy Checklist', 'Inspections - Delete Vacancy Checklist', 'Inspections - Enter Loss Draft Inspection Results', 'Inspections - Enter Results', 'Inspections - Print Inspection', 'Inspections - Save Results', and 'Inspections - Upload Photos'. At the bottom of the form are buttons for 'Reset Password', 'Update', 'Clear Screen', and 'Close'.

Step 3: Changing a current Subcontractor's Password

Click on the Reset Password button at the bottom of the Manage Sub-Contractors screen. An email will be sent to the user with a confirmation hyperlink which will direct the subcontractor to change their password. **The confirmation hyperlink is active for 2 hours after clicking on the Reset Password button.**

This screenshot is identical to the one above, showing the 'Vendor 360 - Manage Subcontractors' application window. The 'Reset Password' button at the bottom of the form is highlighted in yellow, indicating it is the focus of the current step.

At this time changes can be made to the subcontractor permissions as well. Deactivate or reactivate the Subcontractor by unchecking or checking the Subcontractor is Active box.

Manage Users

Mobile App

Do you have an employee or subcontractor who only needs access to the MCS Verify website? If so, they should be set up as a Mobile Only User in Vendor 360.

- Mobile only users can only be set up from the Manage Users option
- If a subcontractor is a mobile only user and try to set them up under the manage subcontractor screen you will receive an error message
- Subcontractors who have Vendor 360 Admin permissions can set up mobile only users for their subcontractor network under their manage users
- Only one ABC number can be used per user per parent Vendor (i.e. Parent Vendor 200 sets up a subcontractor with ABC# FL123456789, that ABC# cannot be associated to any other user under Vendor 200)
- If a mobile only user, needs to be granted Vendor 360 access later when the Vendor 360 application is checked the ABC number associated to the user will become the Vendors username
- To access the [MCS Verify site](#), users need to access the MCS Verify website. See [Memo #1630: MCS Verify Website Release](#) for more information regarding the website.

Step 1: Getting to Manage Users screen

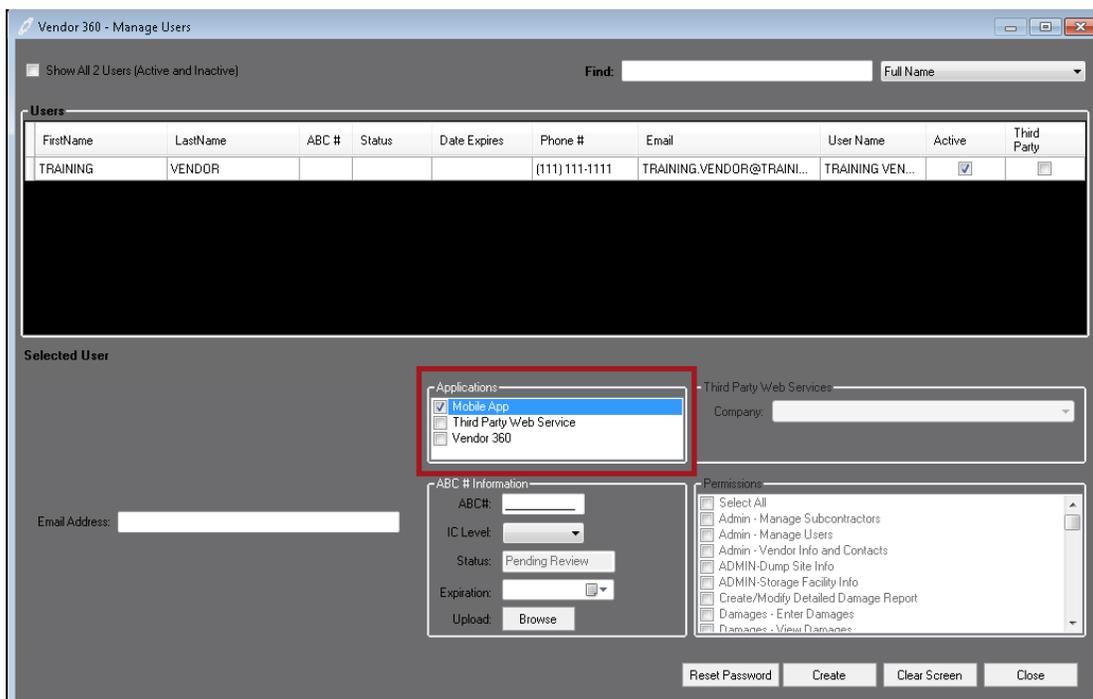


Select **ADMIN** from the title bar and select **Manage Users** from the drop down menu.

The **Manage Users** screen will open.

Step 2: Select the Application that the User needs access to

Check the Mobile App checkbox within the applications window. Only the information that is required to be filled in for a Vendor 360 User will stay active.

A screenshot of the 'Vendor 360 - Manage Users' application window. The window title is 'Vendor 360 - Manage Users'. At the top, there is a search bar with 'Find:' and a dropdown for 'Full Name'. Below this is a table of users. The table has columns: 'FirstName', 'LastName', 'ABC #', 'Status', 'Date Expires', 'Phone #', 'Email', 'User Name', 'Active', and 'Third Party'. One user is listed: 'TRAINING' (FirstName), 'VENDOR' (LastName), with 'Active' checked. Below the table is the 'Selected User' form. It has an 'Email Address:' field. A red box highlights the 'Applications' section, which contains three checkboxes: 'Mobile App' (checked), 'Third Party/Web Service', and 'Vendor 360'. To the right of the 'Applications' section is a 'Third Party Web Services' section with a 'Company:' dropdown. Below that is an 'ABC # Information' section with fields for 'ABC#:', 'IC Level:', 'Status:' (set to 'Pending Review'), and 'Expiration:'. At the bottom right is a 'Permissions' section with a list of permissions, including 'Select All', 'Admin - Manage Subcontractors', 'Admin - Manage Users', 'Admin - Vendor Info and Contacts', 'ADMIN-Dump Site Info', 'ADMIN-Storage Facility Info', 'Create/Modify Detailed Damage Report', 'Damages - Enter Damages', and 'Damages - View Damages'. At the bottom of the form are buttons for 'Reset Password', 'Create', 'Clear Screen', and 'Close'.

Step 3: Enter the Users email address

Make sure the email address is accurate. The system will use this email address to send notification on whether or not the ABC# was approved or denied by the Compliance Team.

Vendor 360 - Manage Users

Show All 2 Users (Active and Inactive) Find: _____ Full Name

FirstName	LastName	ABC #	Status	Date Expires	Phone #	Email	User Name	Active	Third Party
		AB123...	Approved	12/10/2015		JOHN.DOE@GMAIL.COM	AB123456789	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JAKE	DOE	FL154...	Pending Re...	01/13/2016	(421) 345-6789	JAKE.DOE@GMAIL.COM	Jake	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Selected User

Applications:
 Mobile App
 Third Party Web Service
 Vendor 360

Third Party Web Services:
Company: _____

ABC # Information:
ABC #: _____
IC Level: _____
Status: Pending Review
Expiration: _____
Upload: Browse

Permissions:
 Select All
 Admin - Manage Subcontractors
 Admin - Manage Users
 Admin - Vendor Info and Contacts
 ADMIN-Dump Site Info
 Create/Modify Detailed Damage Report
 Damages - Enter Damages
 Damages - View Damages
 File-Messaging System

Email Address: _____

Create Clear Screen Close

Step 4: Update ABC# Information; Upload Screenshot of Aspen Grove site with ABC

Vendor 360 - Manage Users

Show All 2 Users (Active and Inactive) Find: _____ Full Name

FirstName	LastName	ABC #	Status	Date Expires	Phone #	Email	User Name	Active	Third Party
		AB123...	Approved	12/10/2015		JOHN.DOE@GMAIL.COM	AB123456789	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JAKE	DOE	FL154...	Pending Re...	01/13/2016	(421) 345-6789	JAKE.DOE@GMAIL.COM	Jake	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Selected User

Applications:
 Mobile App
 Third Party Web Service
 Vendor 360

Third Party Web Services:
Company: _____

ABC # Information:
ABC #: _____
IC Level: _____
Status: Pending Review
Expiration: _____
Upload: Browse

Permissions:
 Select All
 Admin - Manage Subcontractors
 Admin - Manage Users
 Admin - Vendor Info and Contacts
 ADMIN-Dump Site Info
 Create/Modify Detailed Damage Report
 Damages - Enter Damages
 Damages - View Damages
 File-Messaging System

Email Address: _____

Create Clear Screen Close

Step 5: Click Create



The new user will appear in the Current Users Table. All new mobile users will need to be approved by the Compliance Team. Be sure to check the status column for updates on the user status. Keep in mind, status updates will be sent to the email associated with the user account. If the user is denied, the email will contain the denial reason.

The Users table will auto-populate only active users. To view all users (inactive and active); select the checkbox next to show all users.

Vendor 360

Do you have an employee who needs access to ALL your work orders in Vendor 360, but does not need to use the MCS Verify Website? If so, they should be set up as a Vendor 360 user.

- Vendor 360 users can view all work that is assigned to the parent vendor. This includes work orders from all clients and in all areas.
- Users are recommended for internal processors
- Users with Admin permissions can reset and reactivate other User and subcontractor accounts

Step 1: Getting to the Manage Users screen

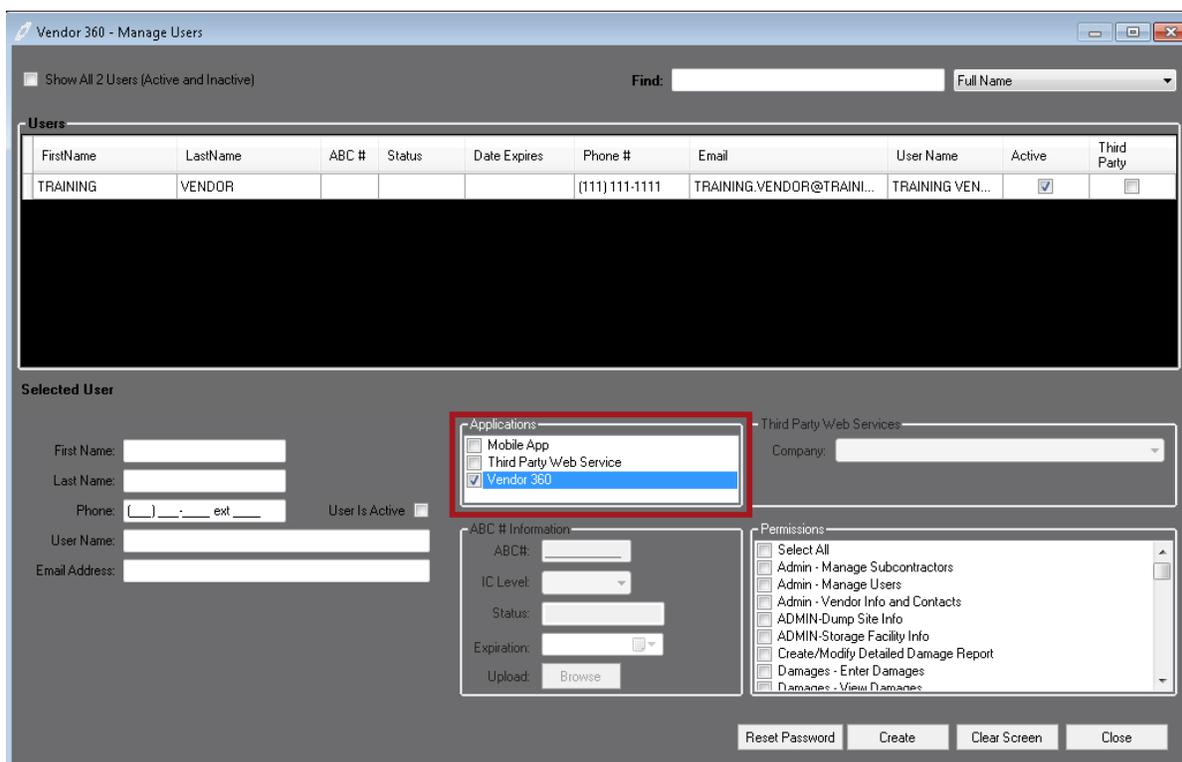


Select **ADMIN** from the title bar and select **Manage Users** from the drop down menu.

The **Manage Users** screen will open.

Step 2: Select the Application that the User needs access to

Check the Vendor 360 checkbox within the applications window. Only the information that is required to be filled in for a Vendor 360 User will stay active.



Vendor 360 - Manage Users

Show All 2 Users (Active and Inactive) Find: Full Name

FirstName	LastName	ABC #	Status	Date Expires	Phone #	Email	User Name	Active	Third Party
TRAINING	VENDOR				(111) 111-1111	TRAINING.VENDOR@TRAINI...	TRAINING VEN...	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Selected User

First Name:
Last Name:
Phone: () . . ext . . User Is Active:
User Name:
Email Address:

Applications:

- Mobile App
- Third Party Web Service
- Vendor 360

Third Party Web Services:

Company:

ABC # Information:

ABC #:
IC Level:
Status:
Expiration:
Upload:

Permissions:

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- ADMIN-Storage Facility Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages

Step 3: Enter Users Profile information; Check the User is Active Checkbox

If a User is locked out of Vendor 360, the “User is Active” checkmark will disappear. To reactivate the User, recheck the “User is Active” and select “Update”.

Vendor 360 - Manage Users

Show All 2 Users (Active and Inactive) Find: Full Name

FirstName	LastName	ABC #	Status	Date Expires	Phone #	Email	User Name	Active	Third Party
TRAINING	VENDOR				(111) 111-1111	TRAINING.VENDOR@TRAINI...	TRAINING VEN...	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Selected User

First Name:
Last Name:
Phone: () - - ext - - User Is Active
User Name:
Email Address:

Applications:
 Mobile App
 Third Party Web Service
 Vendor 360

Third Party Web Services:
Company:

ABC # Information:
ABC#:
IC Level:
Status:
Expiration:
Upload:

Permissions:
 Select All
 Admin - Manage Subcontractors
 Admin - Manage Users
 Admin - Vendor Info and Contacts
 ADMIN-Dump Site Info
 ADMIN-Storage Facility Info
 Create/Modify Detailed Damage Report
 Damages - Enter Damages
 Damages - View Damages

Step 4: Select the User Permissions

Permissions:

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages
- File->Messaging System
- Inspections - AP Batches - Research Inspection
- Inspections - AP Batches - Review Current Batch
- Inspections - AP Batches - Review Processed Batch
- Inspections - Create/Modify Vacancy Checklist
- Inspections - Delete Vacancy Checklist
- Inspections - Enter Loss Draft Inspection Results

Read through ALL User permissions carefully. Check off the all the permissions that the User will need to have access to, in order for them to properly operate within Vendor 360.

Be sure to read through each one, if your User needs to ENTER results they also need to have the permissions to VIEW results.

Inspections - Enter Results
 Inspections - View Results

Step 5: Click Create

The new User will appear in the Current Users table. The Users table will auto-populate only active users. To view all users (inactive and active); select the checkbox next to show all users.

All Users will log into Vendor 360 by utilizing the Main Account Vendor Number, while all Subcontractors will use a system generated Sub-Vendor number.

When a new user is created in the system two automated emails will be sent to the email address associated with the account from mcs360email@mcs360.com. The first email is a welcome email that will contain the user's vendor number (i.e. 200) and the username that was set up. The second email will contain a confirmation hyperlink, which will direct the user to create their password. **The confirmation hyperlink is active for 24 hours after clicking the Create button.**

Keep in mind, only **ONE** User can log into an account at a time. All Users are to have their own individual log-ins and passwords. No two users are permitted to log into Vendor 360 with the same account. If two Users are logged into the same account simultaneously, a **system error** will occur.



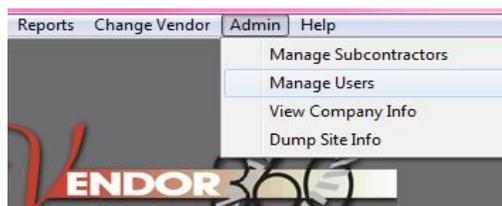
In addition, passwords are only valid for 90 days. Upon expiration, a new password needs to be created meeting the following requirements: a minimum of eight (8) characters with one (1) upper-case, one (1) lower-case, and one (1) number. Passwords cannot be the same as one of the previous 5 passwords.

Mobile App & Vendor 360

Do you have an employee who needs access to ALL your work orders in Vendor 360 and the MCS Verify Website? If so, they should be set up as a Vendor 360 User and Mobile Only User in Vendor 360.

- Remember users for Vendor 360 can view all work orders assigned to the company
- MCS Verify users require an ABC #
- To access the [MCS Verify site](#), users need to access the MCS Verify website. See [Memo #1630: MCS Verify Website Release](#) for more information regarding the website.

Step 1: Getting to the Manage Users screen



Select **ADMIN** from the title bar and select **Manage Users** from the drop down menu.

The **Manage Users** screen will open.

Step 2: Select the Application that the User needs access to

Check the Mobile App and Vendor 360 checkboxes within the applications window. Only the information that is required to be filled in for a Mobile App and Vendor 360 User will stay active.

Vendor 360 - Manage Users

Show All 2 Users (Active and Inactive) Find: Full Name

First Name	Last Name	ABC #	Status	Date Expires	Phone #	Email	User Name	Active	Third Party
TRAINING	VENDOR				(111) 111-1111	TRAINING.VENDOR@TRAINI...	TRAINING VEN...	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Selected User

First Name:
 Last Name:
 Phone: () - ext User Is Active
 User Name:
 Email Address:

Applications

- Mobile App
- Third Party Web Service
- Vendor 360

Third Party Web Services:
 Company:

ABC # Information

ABC#:
 IC Level:
 Status: Pending Review
 Expiration:
 Upload:

Permissions

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- ADMIN-Storage Facility Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages

Step 3: Enter Users Profile information; Check the User is Active Checkbox

If a User is locked out of Vendor 360, the "User is Active" checkmark will disappear. To reactivate the User, recheck the "User is Active" and select "Update".

Vendor 360 - Manage Users

Show All 2 Users (Active and Inactive) Find: Full Name

First Name	Last Name	ABC #	Status	Date Expires	Phone #	Email	User Name	Active	Third Party
TRAINING	VENDOR				(111) 111-1111	TRAINING.VENDOR@TRAINI...	TRAINING VEN...	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Selected User

First Name:
 Last Name:
 Phone: () - ext User Is Active
 User Name:
 Email Address:

Applications

- Mobile App
- Third Party Web Service
- Vendor 360

Third Party Web Services:
 Company:

ABC # Information

ABC#:
 IC Level:
 Status: Pending Review
 Expiration:
 Upload:

Permissions

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- ADMIN-Storage Facility Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages

Step 4: Update ABC# Information; Upload Screenshot of Aspen Grove site with ABC

FirstName	LastName	ABC #	Status	Date Expires	Phone #	Email	User Name	Active	Third Party
TRAINING	VENDOR				(111) 111-1111	TRAINING.VENDOR@TRAI...	TRAINING VEN...	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Selected User

First Name:
Last Name:
Phone: () - - ext User Is Active
User Name:
Email Address:

Applications

- Mobile App
- Third Party Web Service
- Vendor 360

ABC # Information

ABC#:
IC Level:
Status: Pending Review
Expiration:
Upload:

Third Party Web Services

Company:

Permissions

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- ADMIN-Storage Facility Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages

Reset Password Create Clear Screen Close

Step 5: Select the Users Permissions

Permissions

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages
- File->Messaging System
- Inspections - AP Batches - Research Inspection
- Inspections - AP Batches - Review Current Batch
- Inspections - AP Batches - Review Processed Batch
- Inspections - Create/Modify Vacancy Checklist
- Inspections - Delete Vacancy Checklist
- Inspections - Enter Loss Draft Inspection Results

Read through ALL User permissions carefully. Check off the all the permissions that the User will need to have access to, in order for them to properly operate within Vendor 360.

Be sure to read through each one, if your User needs to ENTER results they also need to have the permissions to VIEW results.

Inspections - Enter Results
 Inspections - View Results

Step 6: Click Create

The new User will appear in the Current Users table. The Users table will auto-populate only active users. To view all users (inactive and active); select the checkbox next to show all users.

All Users will log into Vendor 360 by utilizing the Main Account Vendor Number, while all Subcontractors will use a system generated Sub-Vendor number.

When a new user is created in the system two automated emails will be sent to the email address associated with the account from mcs360email@mcs360.com. The first email is a welcome email that will contain the user's vendor number (i.e. 200) and the username that was set up. The second email will contain a confirmation hyperlink which will direct the user to create their password. **The confirmation hyperlink is active for 24 hours after clicking the Create button.**

Keep in mind, only **ONE** User can log into an account at a time. All Users are to have their own individual log-ins and passwords. No two users are permitted to log into Vendor 360 with the same account. If two Users are logged into the same account simultaneously, a **system error** will occur.



In addition, passwords are only valid for 90 days. Upon expiration, a new password needs to be created meeting the following requirements: a minimum of eight (8) characters with one (1) upper-case, one (1) lower-case, and one (1) number. Passwords cannot be the same as one of the previous 5 passwords.

User Grid

The User grid shows all active Users associated to the Parent Vendors account.

Assignment of Username and Password

When a new user is created in the system two automated emails will be sent to the email address associated with the account from mcs360email@mcs360.com. The first email is a welcome email that will contain the user's vendor number (i.e. 200) and the username that was set up. The second email will contain a confirmation hyperlink which will direct the user to create their password. **The confirmation hyperlink is active for 24 hours after clicking the Create button.**

Note: Passwords expire after 90 days. Password must be a minimum of 8 characters long with at least 1 uppercase, 1 lowercase, and 1 number. Vendor 360 passwords cannot be the same as one of the previous 5 passwords.

Both in the login and admin screens passwords are displayed as asterisk. Be sure to not what the password is before distributing the login information.

Status Column in the User Grid

The status column populates the status of the mobile user account.

- Pending: Submitted to MCS for review
- Approved: Mobile user has been approved
- Denied: Mobile user did not pass MCS' review. Reference email sent for denial reason.

Date Expires Column in the User Grid

This is where the date the ABC number expired will populate. If ABC number is expired, user will not be able to check-in. Keep in mind it is your responsibility to track expiration dates and update users with new expiration dates to be reviewed by MCS.

Email Column in the User Grid

The email that is associated to the user account populates here. Keep in mind, this email is used to send status updates for a mobile user and MCS Service Desk.

Active Column in the User Grid

The Active column will have a checkmark only if the subcontractors Vendor 360 application is active.

If you are a Mobile App and Vendor 360 subcontractor user and the Vendor 360 account is deactivated, your mobile app user will not populate in the User grid.

Check the Show All checkbox in the upper left corner to show all subcontractor accounts. Locate the deactivated subcontractor account to reactivate.

Third Party Column in the User Grid

This column contains a checkmark if the account was set up as a third party web service user.

Editing User Accounts

Step 1: Select a Current User

The screenshot shows the 'Vendor 360 - Manage Users' application window. At the top, there is a search bar with a 'Find:' label and a dropdown menu set to 'Full Name'. Below the search bar is a checkbox labeled 'Show All 2 Users (Active and Inactive)'. The main area contains a table with the following columns: First Name, Last Name, ABC #, Status, Date Expires, Phone #, Email, User Name, Active, and Third Party. Two rows are visible: one for 'JOHN.DOE@GMAIL.COM' and one for 'JAKE.DOE@GMAIL.COM'. The 'JAKE.DOE@GMAIL.COM' row is highlighted in blue. Below the table is a 'Selected User' section with various input fields and checkboxes. The 'Applications' section has checkboxes for 'Mobile App', 'Third Party Web Service', and 'Vendor 360'. The 'ABC # Information' section includes fields for 'ABC #', 'IC Level', 'Status', and 'Expiration'. The 'Permissions' section has a list of checkboxes for various system permissions. At the bottom right, there are buttons for 'Modify', 'Clear Screen', and 'Close'.

FirstName	LastName	ABC #	Status	Date Expires	Phone #	Email	User Name	Active	Third Party
		AB123...	Approved	12/10/2015		JOHN.DOE@GMAIL.COM	AB123456789	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JAKE	DOE	FL154...	Pending Re...	01/13/2016	(421) 345-6789	JAKE.DOE@GMAIL.COM	Jake	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Selected User

First Name: JAKE
Last Name: DOE
Phone: (421) 345-6789 ext. ____
User Name: Jake
Password: [REDACTED] User Is Active
Email Address: EMMA.SPEAKMAN@MCS360.COM

Applications

- Mobile App
- Third Party Web Service
- Vendor 360

ABC # Information

ABC #: FL154789523
IC Level: IC01
Status: Pending Review
Expiration: 1/13/2016
Upload: Browse View Document

Third Party Web Services

Company: [REDACTED]

Permissions

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages
- File-Measuring System

Modify Clear Screen Close

Step 2: Edit User Profile

Edits to the contact and permission fields can be made at this time. Select the permissions needed as applicable to the Subcontractor.

The screenshot shows the 'Vendor 360 - Manage Users' window. At the top, there is a search bar and a 'Show All 2 Users (Active and Inactive)' checkbox. Below this is a table of users. The user 'JAKE DOE' is selected, and his profile is displayed in the 'Selected User' section. The profile includes fields for First Name, Last Name, Phone, User Name, Password, Email Address, and a 'User Is Active' checkbox. To the right of the profile are sections for 'Applications' (Mobile App, Third Party Web Service, Vendor 360), 'Third Party Web Services' (Company), 'ABC # Information' (ABC#, IC Level, Status, Expiration), and 'Permissions' (Select All, Admin - Manage Subcontractors, Admin - Manage Users, Admin - Vendor Info and Contacts, ADMIN-Dump Site Info, Create/Modify Detailed Damage Report, Damages - Enter Damages, Damages - View Damages, File-Messaging System). At the bottom right, there are buttons for 'Modify', 'Clear Screen', and 'Close'.

FirstName	LastName	ABC #	Status	Date Expires	Phone #	Email	User Name	Active	Third Party
JAKE	DOE	FL154...	Pending Re...	01/13/2016	(421) 345-6789	JAKE.DOE@GMAIL.COM	Jake	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 3: Changing a current Users Password

Click on the Reset Password button at the bottom of the Manage Users screen. An email will be sent to the user with a confirmation hyperlink which will direct the User to change their password. **The confirmation hyperlink is active for 2 hours after clicking on the Reset Password button.**

This screenshot shows the 'Selected User' profile for JAKE DOE. The 'Reset Password' button at the bottom is highlighted in yellow. A yellow callout box with a red arrow points to the button, containing the text: 'Will forward "password reset" emails to selected user'. The 'User Is Active' checkbox is also visible and checked.

At this time changes can be made to the Users permissions as well. Deactivate or reactivate the User by unchecking or checking the User is Active box.

Step 4: Update Changes

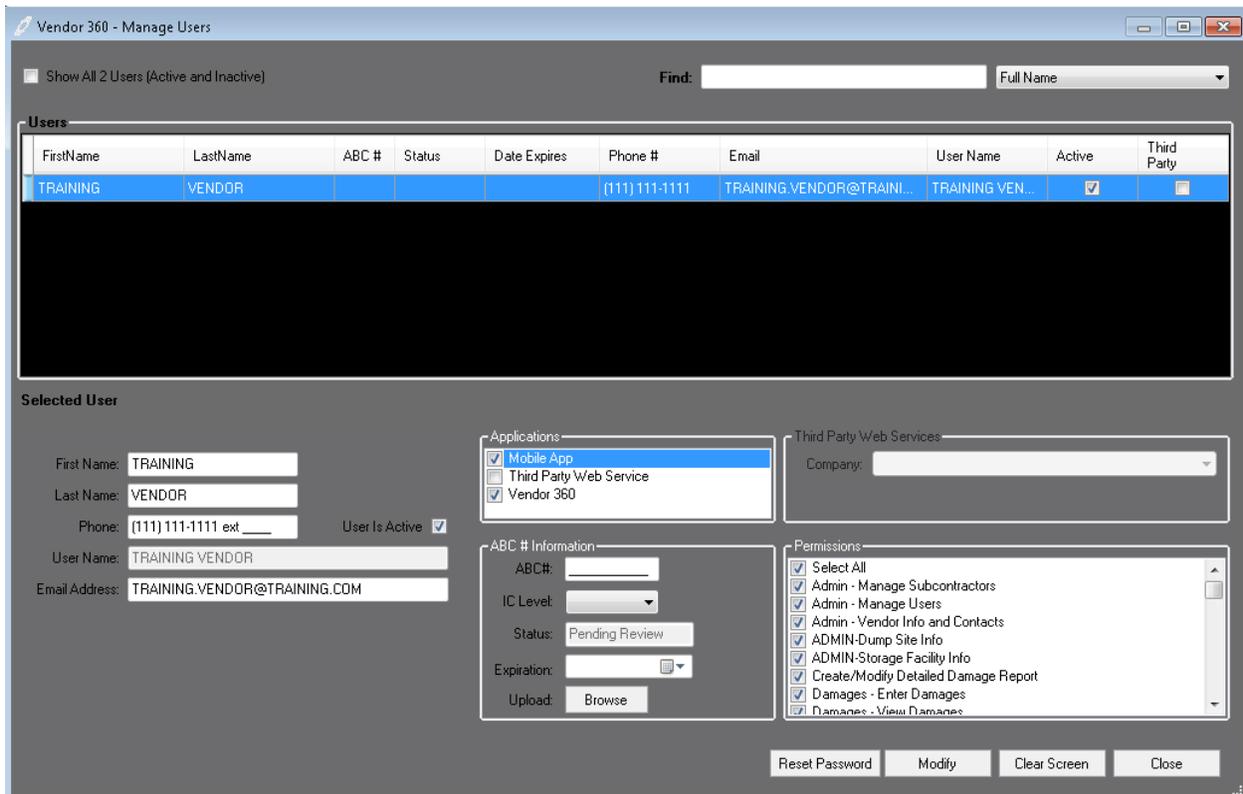
Select update to save any changes that have been made.



Deactivating Accounts

Deactivating a User's Account

Step 1: Select a Current User



FirstName	LastName	ABC #	Status	Date Expires	Phone #	Email	User Name	Active	Third Party
TRAINING	VENDOR				(111) 111-1111	TRAINING.VENDOR@TRAIN...	TRAINING VEN...	<input checked="" type="checkbox"/>	

Selected User

First Name: TRAINING
Last Name: VENDOR
Phone: (111) 111-1111 ext ____ User Is Active
User Name: TRAINING VENDOR
Email Address: TRAINING.VENDOR@TRAINING.COM

Applications

- Mobile App
- Third Party Web Service
- Vendor 360

Third Party Web Services

Company: _____

ABC # Information

ABC#: _____
IC Level: _____
Status: Pending Review
Expiration: _____
Upload: Browse

Permissions

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- ADMIN-Storage Facility Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages

Reset Password Modify Clear Screen Close

Step 2: User Profile Information and User is Active Checkbox

If you choose to update the First Name, Last Name, and Email Address to do not use. Then uncheck the User is Active checkbox.

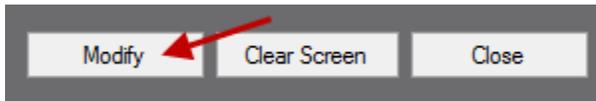


Selected User

First Name: do not
Last Name: use
Phone: (111) 111-1111 ext ____ User Is Active
User Name: TRAINING VENDOR
Email Address: donotuse@TRAINING.COM

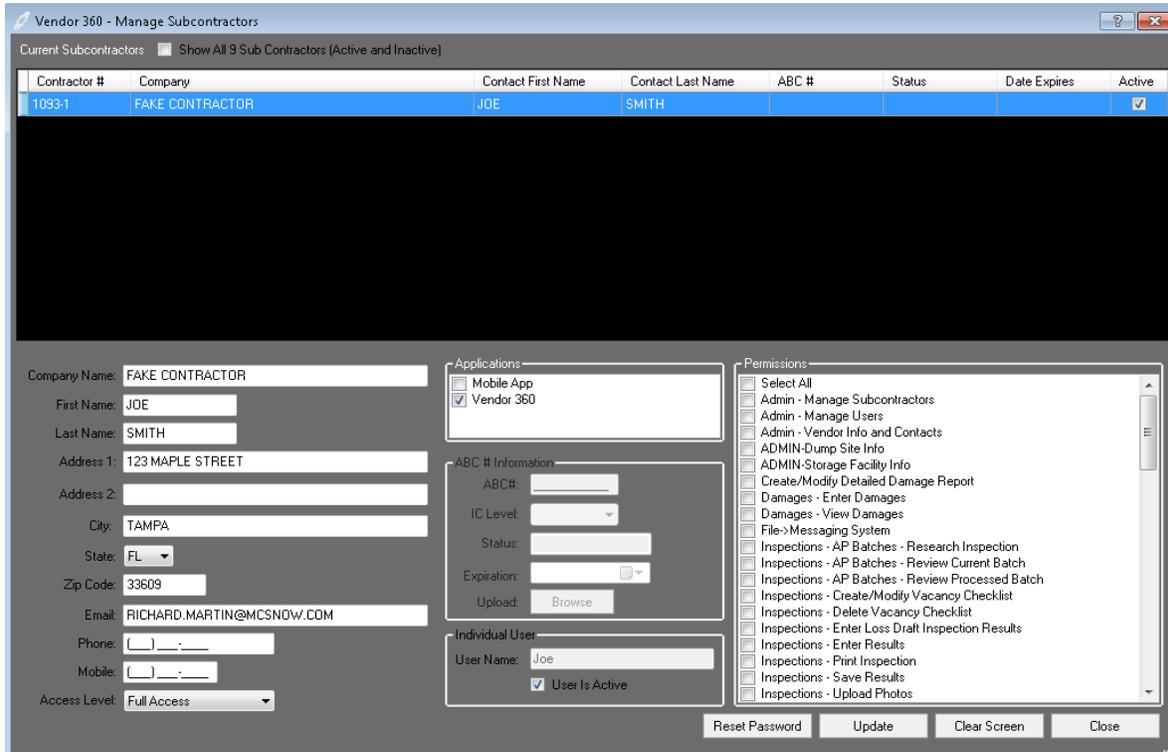
Step 3: Update Changes

Select Modify to save any changes that have been made.



Deactivating a Subcontractors Account

Step 1: Select a Current Subcontractor



Vendor 360 - Manage Subcontractors

Current Subcontractors Show All 9 Sub Contractors (Active and Inactive)

Contractor #	Company	Contact First Name	Contact Last Name	ABC #	Status	Date Expires	Active
1093-1	FAKE CONTRACTOR	JOE	SMITH				<input checked="" type="checkbox"/>

Company Name: FAKE CONTRACTOR

First Name: JOE

Last Name: SMITH

Address 1: 123 MAPLE STREET

Address 2:

City: TAMPA

State: FL

Zip Code: 33609

Email: RICHARD.MARTIN@MCSNOW.COM

Phone: () - -

Mobile: () - -

Access Level: Full Access

Applications:

- Mobile App
- Vendor 360

ABC # Information:

ABC#:

IC Level:

Status:

Expiration:

Upload: Browse

Individual User:

User Name: Joe

User Is Active

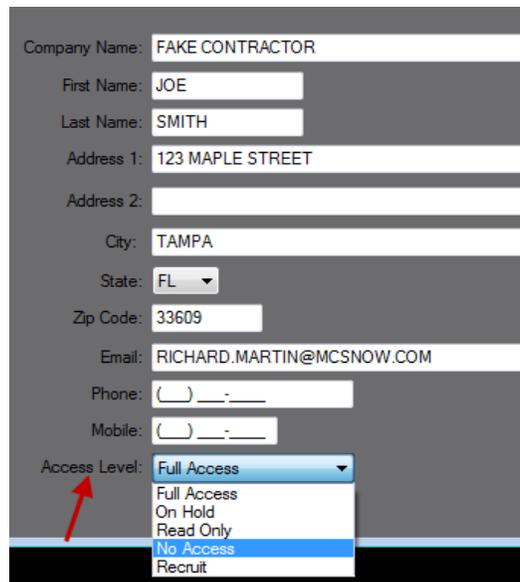
Permissions:

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- ADMIN-Storage Facility Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages
- File->Messaging System
- Inspections - AP Batches - Research Inspection
- Inspections - AP Batches - Review Current Batch
- Inspections - AP Batches - Review Processed Batch
- Inspections - Create/Modify Vacancy Checklist
- Inspections - Delete Vacancy Checklist
- Inspections - Enter Loss Draft Inspection Results
- Inspections - Enter Results
- Inspections - Print Inspection
- Inspections - Save Results
- Inspections - Upload Photos

Reset Password Update Clear Screen Close

Step 2: Access Level

Update the Access Level from Full Access to No Access



Company Name: FAKE CONTRACTOR

First Name: JOE

Last Name: SMITH

Address 1: 123 MAPLE STREET

Address 2:

City: TAMPA

State: FL

Zip Code: 33609

Email: RICHARD.MARTIN@MCSNOW.COM

Phone: () - -

Mobile: () - -

Access Level: Full Access

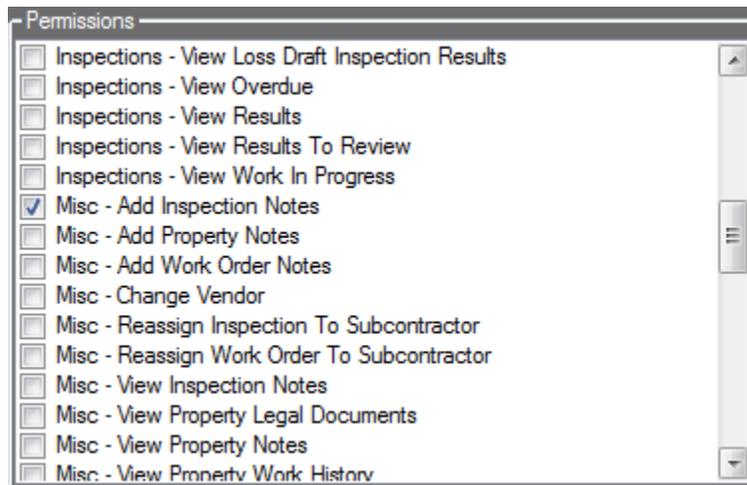
- Full Access
- On Hold
- Read Only
- No Access
- Recruit

Step 3: Uncheck the User is Active checkbox



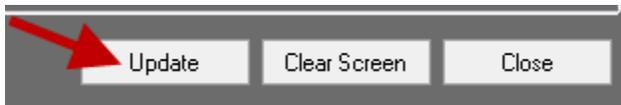
Step 4: Update Permissions

It is recommended to remove all permissions but one. Be sure to select a permission that does not provide access to confidential information (i.e. Misc -- Add Inspection Notes, this is a right click function and in order for a user to use these feature they would need additional permissions)



Step 5: Update Changes

Select update to save any changes that have been made.



Manage Third Party Users

Do you use a third party, i.e. BC Connect, EZ Inspections, or Pruvan? If so, they should be set up as a third party web services user in Vendor 360.

- Do NOT set up your main account as the third party web services user
- Once third party web service user is created provide login credentials to the third party
- Permissions are not needed for third party web service users
- Accounts marked as third party web services can NOT be used to access Vendor 360
 - If anyone other than a Third Party tries to login to Vendor 360 using the Third Party Web Services Account, the following error message will appear.



Step 1: Getting to the Manage Users screen

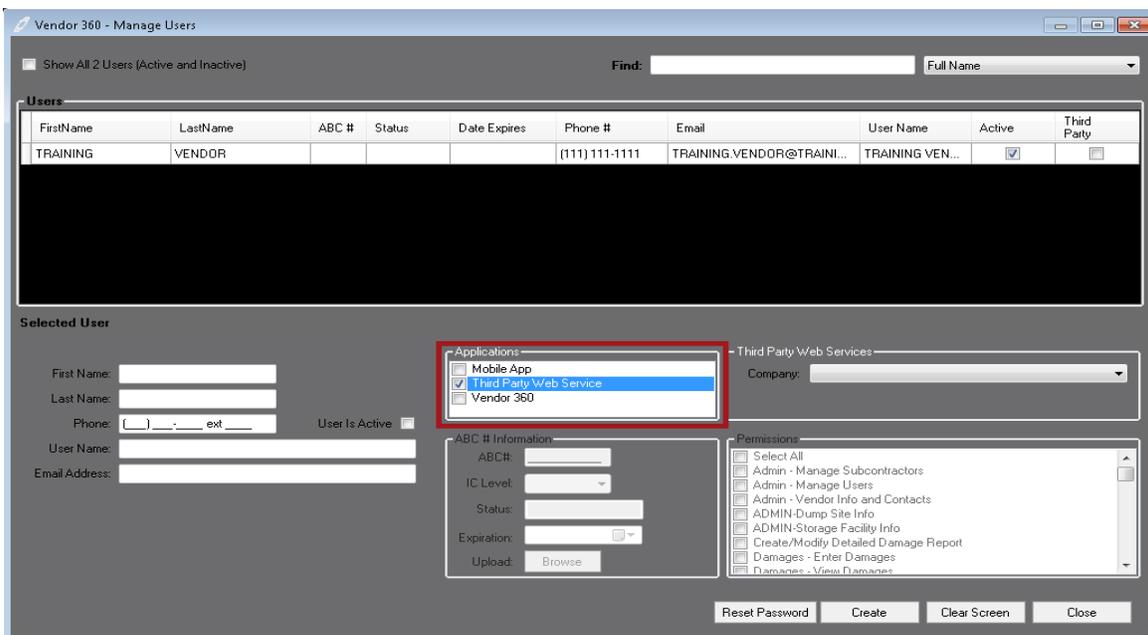


Select **ADMIN** from the title bar and select **Manage Users** from the drop down menu.

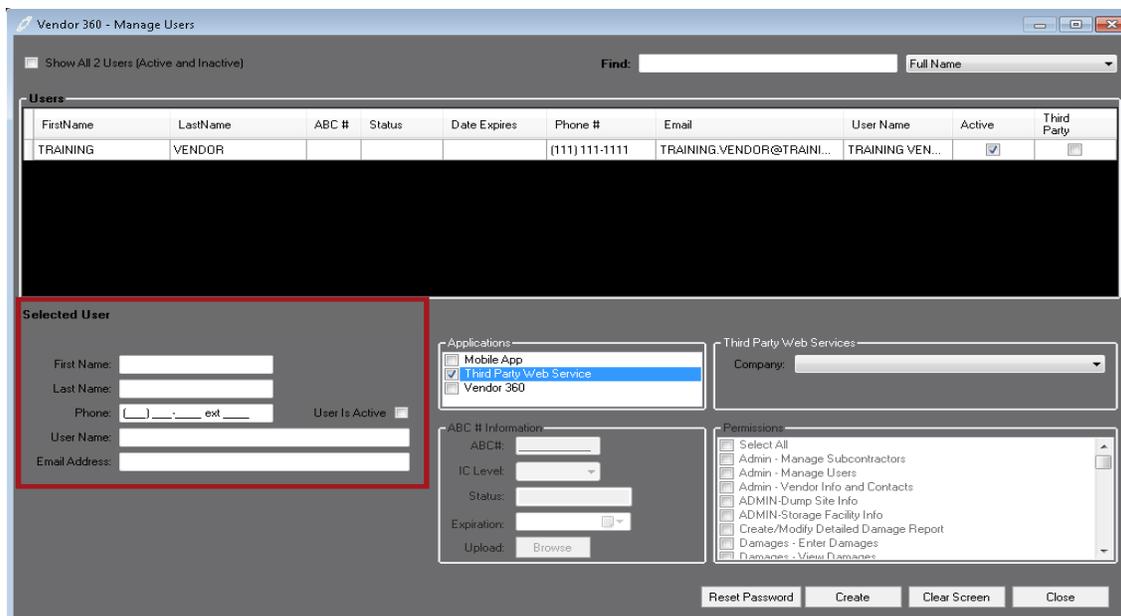
The **Manage Users** screen will open.

Step 2: Select the Application that the User needs access to

Check the Third Party Web Service checkbox within the applications window. Only the information that is required to be filled in for a Third Party Web Service User will stay active.



Step 3: Create Profile; Assign Login; Activate the User Account



Step 4: Select the Third Party Web Services Company Name

For Third Parties performing work on behalf of Vendors, select the Company name from the drop down menu. Only one login is permitted per Third Party. Do not update your main account as a third party.

Vendor 360 - Manage Users

Show All 2 Users (Active and Inactive) Find: _____ Full Name

FirstName	LastName	ABC #	Status	Date Expires	Phone #	Email	User Name	Active	Third Party
TRAINING	VENDOR				(111) 111-1111	TRAINING.VENDOR@TRAINI...	TRAINING VEN...	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Selected User

First Name: _____
Last Name: _____
Phone: (____) _____ ext _____ User Is Active
User Name: _____
Email Address: _____

Applications

- Mobile App
- Third Party Web Service
- Vendor 360

Third Party Web Services

Company: _____

ABC # Information

ABC #: _____
IC Level: _____
Status: _____
Expiration: _____
Upload: Browse

Permissions

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- ADMIN-Storage Facility Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages

Reset Password Create Clear Screen Close

Step 5: Accept the Terms and Conditions

Third Party Terms and Conditions

Terms and Conditions

User shall not disclose or use for the benefit of himself or herself or any other person, corporation, partnership, joint venture, association, or other business organization, any of the trade secrets or confidential business information of MCS or MCS's clients. "Trade secrets" of MCS shall include, but shall not be limited to, any proprietary and technical information of MCS in the nature of sales, pricing methods, operating systems, and associated procedures and systems, parts, information, programs, services, systems, inventions, business techniques and the like developed or employed by MCS. For the purpose of this Agreement, "confidential business information" of MCS shall include any information that is (i) of any value or significance to MCS, and (ii) not generally known to the competitors of MCS nor intended by MCS for general dissemination, including but not limited to any and all proprietary and technical information of MCS in the nature of business operations, operating systems, and associated procedures and systems, accounting and financial data, customers lists, current or potential suppliers/vendors, design systems, pricing and discounting practices, MCS market data, sources of supply, special programs relating to sales, project files, prospect reports, training, products and equipment, and information about MCS itself and its executives, officers, directors, and employees.

User acknowledges that in the course of its dealings with MCS, user may receive or learn confidential information concerning third parties to whom MCS has an obligation of confidentiality, including but not limited to all "nonpublic personal information" about "customers" and "consumers" (as those terms are defined in Title V of the Gramm-Leach-Bliley Act and the privacy regulations adopted thereunder (the "Act")) ("Confidential Information"). The Confidential Information may include but not be limited to personal or financial information about individuals who have applied for or purchased financial products or financial services from Clients of MCS.

User agrees that it will keep all Confidential Information strictly confidential that it will not disclose to any third party other than an affiliate of MCS, either orally or in writing, any Confidential Information without the prior written consent of MCS; and that user will not appropriate any Confidential Information to its own use or to the use of any third party. User shall use confidential information that is provided by MCS only for the purpose for which it was provided and access to it shall be restricted to individuals who require the information to further that purpose.

User agrees to comply and cooperate with any and all additional privacy or confidential information policies as promulgated in the future by clients of MCS. User agrees to take reasonable measures, including without limitation such measures as it takes to safeguard its own confidential information, to ensure the security and confidentiality of all such Confidential Information, to protect against anticipated threats or hazards to the security or integrity of such Confidential Information and to protect against unauthorized access to or use of such Confidential Information, including but not limited to the proper disposal of such information. User agrees that at all times it shall be in compliance with the Act.

I have read and accept the above on behalf of this third party user

Accept Cancel

Step 6: Click Create

Create Clear Screen Close

When a new third party is created in the system two automated emails will be sent to the email address associated with the account from mcs360email@mcs360.com. The first email is a welcome email that will contain the third parties vendor number (i.e. 200) and the username that was set up. The second email will contain a confirmation hyperlink which will direct the third party to create their password. **The confirmation hyperlink is active for 24 hours after clicking the Create button.**

Edits can be made to pre-existing user accounts and passwords at any time.

Note: Passwords expire after 90 days. Password must be a minimum of 8 characters long with at least 1 uppercase, 1 lowercase, and 1 number. Password will show up as asterisks so be sure to note what the password is before distributing the login information. Vendor 360 passwords cannot be the same as one of the previous 5 passwords.

ABC Number Expiration Dates

It is your responsibility to track expiration dates and update users with new expiration dates to be reviewed by MCS. In the Status column of the User or Subcontractor grid, it will state if the ABC # is Expired. Follow the below instructions on how to update Aspen Grove Expiration Dates in Vendor 3600.

Step 1: Select a Current User/Subcontractor with an Expired ABC Number

The screenshot displays the 'Vendor 360 - Manage Subcontractors' application window. At the top, there is a header with the title and a 'Show All 9 Sub Contractors (Active and Inactive)' checkbox. Below this is a table with the following columns: Contractor #, Company, Contact First Name, Contact Last Name, ABC #, Status, Date Expires, and Active. A single row is visible with the following data: Contractor # 1093-1, Company FAKE CONTRACTOR, Contact First Name JOE, Contact Last Name SMITH, ABC #, Status, Date Expires, and Active (checked).

Below the table is a detailed form for editing a subcontractor. The form is divided into several sections:

- Company Information:** Company Name (FAKE CONTRACTOR), First Name (JOE), Last Name (SMITH), Address 1 (123 MAPLE STREET), Address 2, City (TAMPA), State (FL), Zip Code (33609), Email (RICHARD.MARTIN@MCSNOW.COM), Phone, Mobile, and Access Level (Full Access).
- Applications:** A list of applications with checkboxes for 'Mobile App' and 'Vendor 360'.
- ABC # Information:** ABC # (FL132456789), IC Level (IC01), Status (Expired), Expiration (11/ 2/2017), and an Upload button.
- Individual User:** User Name (Joe) and a checked 'User Is Active' checkbox.
- Permissions:** A list of permissions with checkboxes, including 'Select All', 'Admin - Manage Subcontractors', 'Admin - Manage Users', 'Admin - Vendor Info and Contacts', 'ADMIN-Dump Site Info', 'ADMIN-Storage Facility Info', 'Create/Modify Detailed Damage Report', 'Damages - Enter Damages', 'Damages - View Damages', 'File->Messaging System', 'Inspections - AP Batches - Research Inspection', 'Inspections - AP Batches - Review Current Batch', 'Inspections - AP Batches - Review Processed Batch', 'Inspections - Create/Modify Vacancy Checklist', 'Inspections - Delete Vacancy Checklist', 'Inspections - Enter Loss Draft Inspection Results', 'Inspections - Enter Results', 'Inspections - Print Inspection', 'Inspections - Save Results', and 'Inspections - Upload Photos'.

At the bottom of the form are buttons for 'Reset Password', 'Update', 'Clear Screen', and 'Close'.

Step 2: Update the ABC # Information Section

Update the Expiration Date and Upload a screenshot of the Aspen Grove website showing the ABC #, IC Level, and Expiration date of the ABC # you are updating. The Aspen Grove screenshot should be saved as a JPG or PDF document.



Individual Compliance Details

ABC Number: FL 123456789
Current Status: IC01
Current Expiry Date: 02/10/2017 

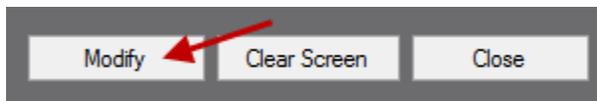
Step 3: Update Changes

When updating the Subcontractors information, select update to save the changes made.



Update Clear Screen Close

When updating the Users information, select Modify to save the changes made.

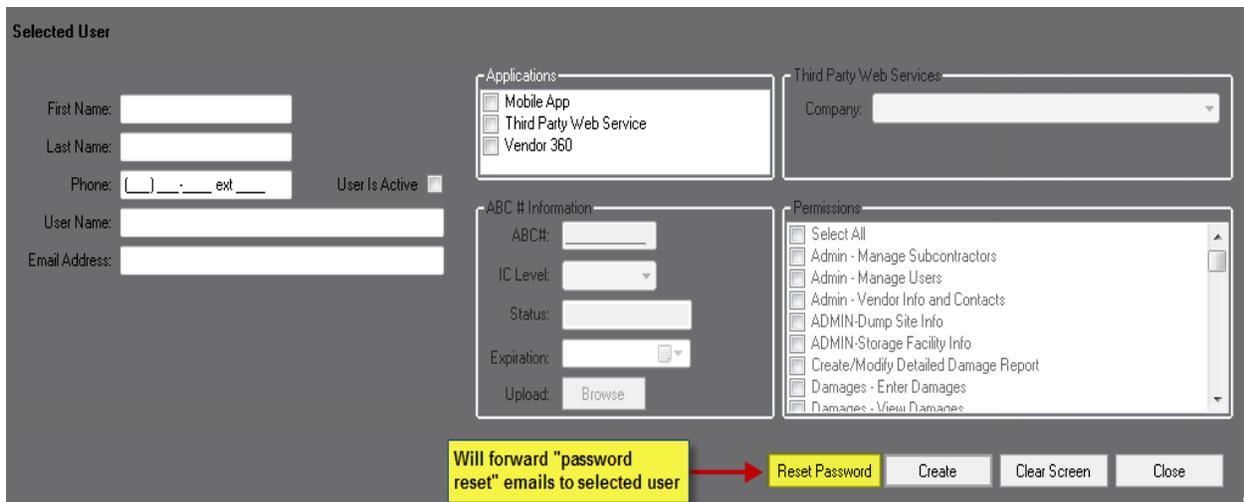


Modify Clear Screen Close

Password Resets for Users and Subcontractors

Vendor 360 Users and Subcontractors can reset their own passwords. User/Subcontractor-enabled password resets will only be possible if the user/subcontractor has submitted security question answers. Security questions are set up when the user first logs into the Vendor 360 application. The reset password email will be sent directly to the user or subcontractor's email address that is associated to the user/subcontractors account. The link will be active for 2 hours to reset the Vendor 360 password.

For Admin users a "Reset Password" button is included at the bottom of the Manage Users screen:



Selected User

First Name:
Last Name:
Phone: () - - ext User Is Active
User Name:
Email Address:

Applications

- Mobile App
- Third Party Web Service
- Vendor 360

Third Party Web Services

Company:

ABC # Information

ABC#:
IC Level:
Status:
Expiration:
Upload:

Permissions

- Select All
- Admin - Manage Subcontractors
- Admin - Manage Users
- Admin - Vendor Info and Contacts
- ADMIN-Dump Site Info
- ADMIN-Storage Facility Info
- Create/Modify Detailed Damage Report
- Damages - Enter Damages
- Damages - View Damages

Will forward "password reset" emails to selected user

For Admin users a “Reset Password” button is included at the bottom of the Manage Subcontractors screen:

The screenshot displays a web form for managing subcontractors. It is divided into several sections:

- Company Information:** Fields for Company Name, First Name, Last Name, Address 1, Address 2, City, State (dropdown), Zip Code, Email, Phone, and Mobile.
- Access Level:** A dropdown menu currently set to "Full Access".
- Applications:** A list with checkboxes for "Mobile App" and "Vendor 360".
- ABC # Information:** Fields for ABC#, IC Level (dropdown), Status, and Expiration (dropdown), along with an "Upload" button and a "Browse" file selector.
- Individual User:** Fields for User Name and a checkbox for "User Is Active".
- Permissions:** A large list of permissions with checkboxes, including "Select All", "Admin - Manage Subcontractors", "Admin - Manage Users", "Admin - Vendor Info and Contacts", "ADMIN-Dump Site Info", "ADMIN-Storage Facility Info", "Create/Modify Detailed Damage Report", "Damages - Enter Damages", "Damages - View Damages", "File->Messaging System", "Inspections - AP Batches - Research Inspection", "Inspections - AP Batches - Review Current Batch", "Inspections - AP Batches - Review Processed Batch", "Inspections - Create/Modify Vacancy Checklist", "Inspections - Delete Vacancy Checklist", "Inspections - Enter Loss Draft Inspection Results", "Inspections - Enter Results", "Inspections - Print Inspection", "Inspections - Save Results", and "Inspections - Upload Photos".

At the bottom right, there are four buttons: "Reset Password" (highlighted in yellow), "Add", "Clear Screen", and "Close".

For Users, a “Forgot Password” option is also located on the Login Screen:

The screenshot shows the "Vendor 360 - Login" window. It features the Vendor 360 logo on the left. To the right of the logo are three input fields labeled "Vendor #", "User Name:", and "Password:". Below these fields are two buttons: "Forgot Password" (highlighted in yellow) and "Submit". At the bottom left, there is a link for "Photo Diagnostic Tool...". The window title bar includes a help icon and a close button.