



Monday



Welcome and Introductions



Welcome and Introductions

- Staff Introductions



Welcome and Introductions

- Staff Introductions
- Partner Introductions



WIFI



WIFI

- Conference Center credentials:
 - SouthSeas Conference
 - Password Step1



Today's Breaks and Meals



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- Immediately after this session there's a break. Refreshments will be available in the hall just outside of this room. (and again mid-afternoon)



Today's Breaks and Meals

- Immediately after this session there's a break. Refreshments will be available in the hall just outside of this room. (and again mid-afternoon)
- Lunch will be in the Captiva Ballroom West (right behind the back wall)



Monday Dinner

- We will be splitting for Dinner tonight between:
 - Doc Ford's (orange)
 - The Pointe (green)



Monday Dinner

- We will be splitting for Dinner tonight between:
 - Doc Ford's (orange)
 - The Pointe (green)
- Your meal choice is both in your badge and also on the SUGM Central app. Place it in front of you once seated.



Monday Dinner

- For those of you dining at The Pointe, the STEP1 Shuttle crew will be running from 5:30 to 6:15 to get everybody up there.
- Meet at the shuttle stop by Hotel Registration.



Monday After Party

- After dinner you are free to do whatever you like



Monday After Party

- After dinner you are free to do whatever you like
- We will be having the STEP1 After Party again this year in the foyer of the conference center!



Monday After Party

- After dinner you are free to do whatever you like
- We will be having the STEP1 After Party again this year in the foyer of the conference center!
- Open tonight and tomorrow night 8:00-10:00
Drink coupons in your badge are for the After Party.



All New SUGM Central!



All New SUGM Central!

- On any device, visit SUGM central



All New SUGM Central!

The screenshot shows the SUGM Central mobile application interface. At the top, there is a navigation bar with a hamburger menu icon on the left, a refresh icon, the SUGM Central logo (with the tagline 'STEP1 USER GROUP MEETING COMPANION'), and a download icon on the right. Below the navigation bar is a list of menu items, each with an icon and a right-pointing arrow:

- CLASS SCHEDULE
- FULL MEETING EVALUATION
- EARLY 2018 REGISTRATION
- PRODUCTS YOU HAVE
- PRODUCTS YOU DON'T
- MON DINNER CARD
- TUES DINNER CARD

At the bottom of the screen, a dark grey bar displays the text 'Your current STEP1 version:' followed by the version number 'v7.37' in green.



All New SUGM Central!

- On any device, visit SUGM central
- SUGM Live is your real time tool for what's happening









All New SUGM Central!

- On any device, visit SUGM central
- SUGM Live is your real time tool for what's happening
 - Shows what's going on now
 - ...and what's coming up next



Class Check In

QUICK LINKS

-  PROFILE 
-  LIVE 
-  **CLASS CHECK-IN** 

Class Check-In

Which class? *

Please select ▼

CHECK IN



All Handouts are in the app

HANDOUT DOWNLOADS BY PRESENTER

-  BOB'S HANDOUTS
-  GERRY'S HANDOUTS
-  MARK'S HANDOUTS
-  MATT'S HANDOUTS
-  KATHIE'S HANDOUTS
-  QUINT'S HANDOUTS
-  STEVE'S HANDOUTS
-  CODY'S HANDOUTS
-  TIM'S HANDOUTS
-  LUKE'S HANDOUTS
-  MARK'S HANDOUTS
-  CHAD'S HANDOUTS
-  JOHN M'S HANDOUTS
-  PJ'S HANDOUTS
-  ROB'S HANDOUTS
-  JOHN C'S HANDOUTS



SUGM Central

- Two things that will help us the most:



SUGM Central

- Two things that will help us the most:
 - Check in to your class - this helps us remember who was in the classes



SUGM Central

- Two things that will help us the most:
 - Check in to your class - this helps us remember who was in the classes
 - Please remember to rate each class



What's New in Version 7.38?



What's New in Version 7.38?

- SNAP Level 2



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- CRM Enhancements



What's New in Version 7.38?

- SNAP Level 2
- CRM Enhancements
- Web Sales Rep, Supply Usage Manager, and Customer Self Service enhancements



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- New 'Convert Quote to Order' procedure



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- New 'Convert Quote to Order' procedure
- Enhanced A/R Balance Adjustments procedure



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- CRM Enhancements
- Web Sales Rep, Supply Usage Manager, and Customer Self Service enhancements
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- Enhanced A/R Balance Adjustments procedure
- New 'STEP1 Report Archives' procedure



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- CRM Enhancements
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- New 'Convert Quote to Order' procedure
- Enhanced A/R Balance Adjustments procedure
- New 'STEP1 Report Archives' procedure
- New 'Minimum Order Charge' procedure



What's New in Version 7.38?

- New way to reach support – 'Ask Support'



What's New in Version 7.38?

- New way to reach support – 'Ask Support'
- There is a 7.38 Enhancement list in your folders



SNAP



SNAP

- STEP1 Notes And Photos



SNAP

- STEP1 Notes And Photos
- Introduced last year, SNAP Level 1 is in v7.37



SNAP

- STEP1 Notes And Photos
- Introduced last year, SNAP Level 1 is in v7.37
- Allows you to attach a note, document or photo to an object in STEP1:



SNAP – Attach Notes to:

- Customer
- Vendor
- Item
- Service Department Machine
- Order/Invoice
- PO



SNAP Level 1 Popular Uses:



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- Resale Certificate attached to a Customer



SNAP Level 1 Popular Uses:

- Resale Certificate attached to a Customer
- Customer PO attached to the order



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- Web page, brochures attached to inventory items



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- Resale Certificate attached to a Customer
- Customer PO attached to the order
- Web page, brochures attached to inventory items
- Vendor Order Acknowledgments, Shipping Confirmations, Invoices attached to PO
- Photo of damaged arrivals from Vendor to PO



SNAP Level 1 Popular Uses:

- Resale Certificate attached to a Customer
- Customer PO attached to the order
- Web page, brochures attached to inventory items
- Vendor Order Acknowledgments, Shipping Confirmations, Invoices attached to PO
- Photo of damaged arrivals from Vendor to PO
- Photo of damaged item to customer order



SNAP Level 1 A/R Call Tracking:



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- (example)



SNAP Level 1 A/R Call Tracking:

- SNAP note created for each customer that your A/R staff needed to call.
- Allows 'To-Do' to be set up to double check customer's promises.
- (example)
- Allows visibility to the rest of the staff (our first step towards collaboration)



SNAP Level 2



SNAP Level 2

- SNAP Level 1 organizes informational (after the fact) Notes for historical reference.



SNAP Level 2

- SNAP Level 1 organizes informational (after the fact) Notes for historical reference.
- SNAP Level 2 Allows collaboration between staff members *as events are happening*, rather than after the fact.



SNAP Level 2

- SNAP 2 is *NOT* a replacement for email...
it is a separate tool



SNAP Level 2

- SNAP 2 is *NOT* a replacement for email... it is a separate tool
- SNAP 2 has accountability that accompanies each collaboration:
 - Did they look at it?
 - Did they complete it?



SNAP Level 2 Example



SNAP Level 2 Example

- Inbound item from vendor damaged.



SNAP Level 2 Example

- Inbound item from vendor damaged.
- This is the sort of situation that could easily fall through the cracks!



SNAP Level 2 Example

- Inbound item from vendor damaged.
- You will need to:



SNAP Level 2 Example

- Inbound item from vendor damaged.
- You will need to:
 - Have Purchasing contact the vendor
 - Vendor will either:
 - Give you credit (original bill already emailed)
 - Send replacement items



SNAP Level 2 Example

- Inbound item from vendor damaged.
- If vendor issuing credit:
 - Collaborate with the A/P person to make sure we get the credit!



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 - Collaborate with the A/P person to make sure we get the credit!
- If vendor sending replacements:
 - Collaborate with Warehouse Manager to make sure we get the item!



SNAP Level 2 Example

- Inbound item from vendor damaged.
- If vendor issuing credit:
 - Collaborate with the A/P person to make sure we get the credit!
- If vendor sending replacements:
 - Collaborate with Warehouse Manager to make sure we get the item!
- Once finished, it's all documented and saved!



SNAP Level 2 Example



SNAP Level 2 Example

- Hospital is expanding! Need new equipment.



SNAP Level 2 Example

- Hospital is expanding! Need new equipment.
- We have been given the opportunity to do an on-site demo of all equipment that they will need!



SNAP Level 2 Example

- Hospital is expanding! Need new equipment.
- You will need to:



SNAP Level 2 Example

- Hospital is expanding! Need new equipment.
- You will need to:
 - Purchasing-make sure all equ needed is in house
 - Service-coordinate assembly and delivery
 - Warehouse- product needed to support demo
 - Equ Specialist- needs to be available for the demo



SNAP Level 2 Collaboration



SNAP Level 2 Collaboration

- SNAP gives you 2 ways to *inform* a colleague:



SNAP Level 2 Collaboration

- SNAP gives you 2 ways to *inform* a colleague:
 - ‘Attention’ – This means the note is relevant to them



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 - ‘FYI’ – This means the note may be of interest to them



SNAP Level 2 Collaboration

- SNAP gives you 2 ways to *inform* a colleague:
 - ‘Attention’ – This means the note is relevant to them
 - ‘FYI’ – This means the note may be of interest to them
- And a way to *compel* a colleague to do something
 - ToDo Task



SNAP Level 2 Collaboration

- SNAP gives you 2 ways to *inform* a colleague:
 - ‘Attention’ – This means the note is relevant to them
 - ‘FYI’ – This means the note may be of interest to them
- And a way to *compel* a colleague to do something
 - ToDo Task
- Everybody gets their own dashboard to manage this (called SNAP Dash)



SNAP Dashboard * COMMERCIAL MICRO-SYSTEMS, INC.

File Search SavedQueries Help

Refresh All Tab Counts [F10]

Check for Tray Alert every 5 minutes

Test Tray Alert

Server Local Time: 7:27am

My Notes (0 / 14)

Attn Notes (0 / 15)

FYI Notes (0)

Alerts (0 / 0)

To-Dos (0 / 1)

To-Do Mgr (0 / 0)

Projects (8)

KBDocs

Search Notes

T	Last Update	LastUpdateBy	Author	Topic	SubTopic	Note Subject
N	21-Feb-2017 12:26pm	BOB	BOB	Programming	Enhancement Req	WA Phase 3 - Shoroom sales & Will Call
N	14-Feb-2017 7:25am	BOB	BOB	Programming	Enhancement Req	Minimum Order Charge Discussion
N	13-Feb-2017 7:22am	HAL	BOB	Programming	Enhancement Req	WA Phase 2 - Label the shelves
N	27-Jan-2017 9:01am	MARK	BOB	Programming	Enhancement Req	Starting point for Whse Auto - Jan 2017 thoughts..
N	9-Sep-2016 7:13am	BOB	BOB	Sales	General	Determine Location & Venue
N	9-Sep-2016 7:11am	BOB	BOB	Sales	General	Bob/Matt figure out 'short list' Dim tasks for PL
N	9-Sep-2016 7:07am	BOB	BOB	Sales	General	Determine which PL customers have Dimensions
N	15-Oct-2015 1:16pm	HAL	BOB	Programming	Design	WH Automation - Administrative Overview
N	15-Oct-2015 1:13pm	HAL	BOB	Programming	Design	WH Automation - Receiving
N	15-Oct-2015 1:09pm	HAL	BOB	Programming	Design	WH Automation - Order Picking (take down)
N	15-Oct-2015 1:05pm	HAL	BOB	Programming	Design	How Backorders get handled
N	15-Oct-2015 12:47pm	HAL	BOB	Programming	Design	Mini wave pull
N	9-Sep-2015 7:40am	BOB	BOB	Programming	Design	WH Automation - Put Up

View/Modify

Add Note

Refresh List

Topic Filter

All Topics

One Topic

Skip Topic

Show All of My Notes/Docs?

Urgent 10perntClose

Connected to Server

STEP1 Software v7.3841

CMS

BOB



View Note

File Search

WA Phase 3 - Shoroom sales & Will Call

Mark as UnViewed **Modify Note**

Exit

Note Text | Control Info | To-Dos (0) **Attn/FYI/Restricted Users** | ALL Viewers

Type	UserLogin	User Name	Viewed	Last Viewed	User Status	BackAtTime	VacationStart
▶ Attn	GERRY	Gerry Human	Y	22-Feb-2017 11:13am	Available		3-Jul-2016
Attn	HAL	Hal Frutiger	Y	24-Feb-2017 1:41pm	Available		
Attn	MARK	Mark Drengson	Y	21-Feb-2017 12:31pm	Available		

Force User ReView

Force ALL Users to ReView

Last Note Update:
21-Feb-2017 12:26pm
BOB

Refresh Attn/FYI User List

3 Users



SNAP Projects



SNAP Projects

- A 'Project' is a collection of SNAP notes, photos, and documents on a particular subject.



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- Allows you to group SNAP notes together that belong together, to make it easier to manage.



SNAP Projects

- A 'Project' is a collection of SNAP notes, photos, and documents on a particular subject.
- Allows you to group SNAP notes together that belong together, to make it easier to manage.
- Example: You are planning your annual 'Customer Appreciation Day' event



SNAP Project – Customer Event:

- Invite (and charge) Vendors for having a table or booth at the event
- Reserve hotel convention space
- Plan the lunch menu
- Identify/purchase/stage/ship product needed
- Plan seminars
- Invite Customers



SNAP Project – Customer Event:

- Now you can have a SNAP note for each issue, each with 'Attention', 'FYI', and 'Todos' as needed



SNAP Project – Customer Event:

- Now you can have a SNAP note for each issue, each with 'Attention', 'FYI', and 'Todos' as needed
- View the 'big picture' of the project and then zoom down to any of the details as needed.



SNAP classes at SUGM:



SNAP classes at SUGM:

- SNAP for Users



SNAP classes at SUGM:

- SNAP for Users
- SNAP for Supervisors



SNAP classes at SUGM:

- SNAP for Users
- SNAP for Supervisors
- Advanced SNAP



SNAP Level 1 Fees



SNAP Level 1 Fees

- SNAP Level 1 is included in the base product, no up front charge and no fees (and replaces the old 'memo' way of doing notes).



SNAP Level 1 Fees

- In order to link to Photos and/or Documents in a note, you will need to subscribe to a cloud based storage service to store that content.



SNAP Level 1 Fees

- In order to link to Photos and/or Documents in a note, you will need to subscribe to a cloud based storage service to store that content.
- We have designed an interface called STEP1 Simple Storage Services (S4), that makes it easy to upload and link to cloud storage.



SNAP Level 1 Fees

- In order to link to Photos and/or Documents in a note, you will need to subscribe to a cloud based storage service to store that content.
- We have designed an interface called STEP1 Simple Storage Services (S4), that makes it easy to upload and link to cloud storage.
- No up front fee, \$25/mo S4 interface fee plus cloud storage fees.



SNAP Level 1 Fees

- S4 cloud storage is very affordable...



SNAP Level 1 Fees

- S4 cloud storage is very affordable...
- Pricing for 20gb of space is less than \$1/month



SNAP Level 1 Fees

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- Pricing for 20gb of space is less than \$1/month
- This is something you subscribe directly with the vendor, and it auto-charges to your cc.



SNAP Level 1 Fees

- S4 cloud storage is very affordable...
- Pricing for 20gb of space is less than \$1/month
- This is something you subscribe directly with the vendor, and it auto-charges to your cc.
- In addition to storing your SNAP content, S4 can also store your POD Scans, and archive your STEP1 Data backups. (Ransomware protection)



SNAP Level 2 Fees



SNAP Level 2 Fees

- \$25/month, no up front fees



CRM Enhancements



CRM Enhancements

- Customer Centric. Once you have identified the customer, you can stay on that customer:



CRM Enhancements

- Customer Centric. Once you have identified the customer, you can stay on that customer:
 - View Customer Dashboard & Trends



CRM Enhancements

- Customer Centric. Once you have identified the customer, you can stay on that customer:
 - View Customer Dashboard & Trends
 - Add or View Activities, Opportunities, and Notes



CRM Enhancements

- Customer Centric. Once you have identified the customer, you can stay on that customer:
 - View Customer Dashboard & Trends
 - Add or View Activities, Opportunities, and Notes
- ...and the same for Prospects.



CRM Enhancements

- CRM is now *local* on your database rather than in the cloud...



CRM Enhancements

- CRM is now *local* on your database rather than in the cloud...
 - Contacts changed or added in CRM are updated directly in your STEP1 database. (You can flag this to only affect sales contacts)



CRM Enhancements

- CRM is now *local* on your database rather than in the cloud...
 - Contacts changed or added in CRM are updated directly in your STEP1 database. (You can flag this to only affect sales contacts)
 - Notes entered for a customer in CRM are attached to that customer as a SNAP note.



CRM Enhancements

CRM

crmdemo.step1.com/Customers.aspx

Wallace Semper

Micheal's Carpet Care (MICHA100) C

Administration

Search Customers

Cash Sales-Customer's W/O Account

Abe's Saddle & Bridal
325 Washington Steet
Nobelsville, IN

Aircraft Supply
18 Lime Street
Peoria, IL

American Plumbing
P O Box 4067
Ethan, IN

Americscape Supply
9145 Vincent Streete
Harick, MI

Anderson Frozen Foods
P O Box 13369
Swanson, KS

Anderson Supply

Market Group: Contract Cleaners Class: B

Customer Score Card

	Year To Date		Last 3 Months		Last Month	
	CY	PY	CY	PY	CY	PY
Sales	23,387	20,008 ↑	21,189	20,008 ↑	15,936	17,951 ↓
GP	9,478	5,613 ↑	8,574	5,613 ↑	7,027	4,921 ↑
Avg GP/Order	1,053	561 ↑	1,225	561 ↑	1,757	984 ↑
GP %	40.5	28.1 ↑	40.5%	26.5% ↑	44.1%	27.4% ↑

Category ScoreCard

Category	% of Sales Customer	% of Sales Group	LastSaleDate	12mth Sales	12mth Profit
CHEMICALS	58.0	0	5/11/2015	↑	↑
EQUIPMENT	34.5	0	5/11/2015	↑	↑
TOOLS	7.3	0	4/27/2015	↑	↑
REFERENCE ITEMS	0.2	0	5/12/2015	↑	↑

Customers Prospects Contacts Opportunity Activities Notes Calendar



CRM Enhancements

CRM

crmdemo.step1.com/Customers.aspx

Wallace Semper

Micheal's Carpet Care (MICHAET100) C Administration

GP	9,478	5,613	8,574	5,613	7,027	4,921
Avg GP/Order	1,053	561	1,225	561	1,757	984
GP %	40.5	28.1	40.5%	26.5%	44.1%	27.4%

Top 10 Items

ItemCode	CustomerName	LastSaleDate
3139	Microfiber Glass & Mirror Towel	10/16/2014
3141	Microfiber Dusting Cloth	
3140	Microfiber Cleaning Cloth	
3138	Microfiber Polishing Cloth	
FHP266-01	Acclaim Roll Towel,White,800'	
25000	Single Roll Tissue Dispenser	
CLT22020	DO NOT USE/NEW # PBM5241	
CLT22016	Do Not Use/ USE PBM5002	
KIM21400	Kleenex Facial Tissue	
KIM1890	Multifold Towel,White	

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Customers Prospects Contacts Opportunity Activities Notes Calendar



CRM Enhancements

The screenshot displays a mobile CRM application interface. At the top, the status bar shows the time as 10:16 AM and various system icons. The browser address bar indicates the URL `crmdemo.step1.com/Opportunities.aspx`. The user is logged in as Wallace Semper, and the current record is for 'Micheal's Carpet Care (MICHAET100) C'.

Left Sidebar: A list of opportunities is shown, with the top entry highlighted in blue:

- Increase sales in Chemicals & Liners**
5/14/2015 12:00:00 AM
0
- Increase sales in Chemicals & Liners**
5/8/2015 12:00:00 AM
0
- Increase sales in Chemicals & Liners**
5/8/2015 12:00:00 AM
0

Main Form Fields:

- Opportunity:** Increase sales in Chemicals & Liners
- Contact:** Micheal M.
- Opportunity Type:** 2
- Opportunity Source::** Direct Mail
- Date Open:** 5/14/2015
- Date Close:** 5/18/2017

A **Save Opportunity** button is located below the form fields.

Bottom Section: Two expandable sections are visible:

- No Milestones** (with a '+' icon)
- No Competitors** (with a '+' icon)

Bottom Navigation Bar: Contains tabs for Customers, Prospects, Contacts, **Opportunity** (active), Activities, Notes, and Calendar.



CRM Enhancements

The screenshot displays a mobile CRM application interface. At the top, the system tray shows icons for signal strength, Wi-Fi, and battery, along with the time 10:17 AM. The browser address bar shows the URL `crmdemo.step1.com/Activities.aspx`. The user is logged in as Wallace Semper, and the current record is for 'Micheal's Carpet Care (MICHAET100) C'. A search bar for activities is visible. On the left, a list of activities includes 'Wrote Order' (5/18/2015 12:00:00 AM), 'Demo' (5/8/2015 12:00:00 AM), and 'Training' (3/2/2015 12:00:00 AM). The main view shows the details for the 'Wrote Order' activity, including fields for Activity Date (5/18/2015), Activity (Wrote Order), Category (LINERS), Supplier (Lagasse Bros. Inc.), Campaign, Opportunity (5000), Contact (Micheal M.), and Follow Up (5/25/2015, 3:00 PM, All Day). A 'Notes' field contains the text: 'Got nice order on liners, will look at additional items next week.' The bottom navigation bar includes tabs for Customers, Prospects, Contacts, Opportunity, Activities (selected), Notes, and Calendar.

CRM

crmdemo.step1.com/Activities.aspx

Wallace Semper

Micheal's Carpet Care (MICHAET100) C

Administration

Search Activities

Wrote Order
5/18/2015 12:00:00 AM
n/a

Demo
5/8/2015 12:00:00 AM
n/a

Training
3/2/2015 12:00:00 AM
n/a

Activity Date: 5/18/2015

Activity: Wrote Order

Category: LINERS

Supplier: Lagasse Bros. Inc.

Campaign:

Opportunity: 5000

Contact: Micheal M.

Follow Up: 5/25/2015 3:00 PM All Day Outlook

Notes: Got nice order on liners, will look at additional items next week.

Customers Prospects Contacts Opportunity **Activities** Notes Calendar



CRM Enhancements

The screenshot displays a mobile application interface for a CRM system. At the top, the status bar shows the time as 10:17 AM and various system icons. The browser address bar indicates the URL `crmdemo.step1.com/SnapNotes.aspx`. Below the browser, a navigation bar identifies the user as Wallace Semper and the current record as Micheal's Carpet Care (MICHA100) C, with an Administration button on the right. A plus sign icon is visible in the top left of the main content area.

The main content area displays a list of three notes, each with a notepad icon and a red pencil icon:

- Note 1:** Date: 05/08/2015, By: Cody Fisher, Sub Topic: Sales - General, Content: Increase Sales!!
- Note 2:** Date: 05/11/2015, By: Wallace Semper, Sub Topic: Sales - Follow Up, Content: Scrubber Repair
- Note 3:** Date: 05/08/2015, By: Cody Fisher, Sub Topic: Sales - General, Content: This is a test

At the bottom of the screen, a navigation menu includes the following items: Customers, Prospects, Contacts, Opportunity, Activities, **Notes** (highlighted), and Calendar. The bottom-most part of the image shows standard mobile OS navigation icons.



CRM Enhancements

- Turn Prospect into a Customer



CRM Enhancements

- Turn Prospect into a Customer
- Now in A/R in STEP1, you can turn a CRM prospect into a customer



A/R Manager * STEP1 Supply Co. (v7.38 Test)

File Search Reports Utilities SavedQueries Help

Customers | Payment Groups | Open Invoices | Pending Orders | Unposted Payments | Invoice History

CustomerName	CustAcct	PmtGroup	Age	Stmt	Call?	A/R Caller	Followup	Total Due	Current	31-45 Days	41 ^
<input type="checkbox"/> Richmond High School	.RICHMO100		Hld	P	N			\$17,173.78	\$0.00	\$0.00	
<input type="checkbox"/> Society of St Vincent De Paul	.STVINC100		Hld	P	N			\$9,514.55	\$0.00	\$0.00	
<input type="checkbox"/> DirtQuest Cleaning Service	.DIRTQU100		Hld	P	N			\$7,674.81	\$0.00	\$0.00	
<input type="checkbox"/> University of Indianapolis	.UNIVER110		Hld	P	N			\$5,295.61	(\$24.15)	\$0.00	
<input type="checkbox"/> Semtech, Inc	.SEMTEC100		Hld	P	N			\$3,974.98	(\$26.62)	\$0.00	
<input type="checkbox"/> Donnelly & Company	.DONNEL100		Hld	P	N			\$3,898.39	\$0.00	\$0.00	
<input type="checkbox"/> Chicago Unified School District	.CHICAG100	HAM	Hld	P	Y			\$3,647.28	\$0.00	\$0.00	
<input type="checkbox"/> Delaney Community School	.DELANE100		Hld	P	N			\$3,630.35	\$0.00	\$0.00	
<input type="checkbox"/> Industry Supply Company	.INDUST100		Hld	P	N			\$3,144.43	\$0.00	\$0.00	
<input type="checkbox"/> Johnston's Commercial Flooring	.JOHNST100		Hld	P	N			\$3,139.55	\$0.00	\$0.00	
<input type="checkbox"/> Garisons Engineering	.GARRIS100		Hld	P	Y		19-May	\$3,085.90	(\$21.18)	\$0.00	
<input type="checkbox"/> Dingmans Sporting Goods	.DINGMA100	DUNHAM	Hld	P	N			\$1,817.58	(\$295.98)	\$0.00	
<input type="checkbox"/> Stoney Creek B&B's	.STONEY100		Hld	P	N			\$1,933.56	\$0.00	\$0.00	
<input type="checkbox"/> St Pauls Catholic Academy	.STPAUL100		Hld	P	N			\$1,572.93	\$0.00	\$0.00	
<input type="checkbox"/> Aircraft Supply	.AIRCRA100		Hld	P	N			\$1,090.09	(\$191.18)	\$0.00	
<input type="checkbox"/> Direct Service Inc	.DIRECT100		Hld	P	N			\$1,201.25	\$0.00	\$0.00	
<input type="checkbox"/> Mike's Carpet Care	.MIKES110	MIKES	Hld	P	Y			\$1,172.13	\$0.00	\$0.00	
<input type="checkbox"/> Cash Sales-Customer's W/O Account	..CASH		Hld	P	N			\$928.38	(\$115.18)	\$0.00	
<input type="checkbox"/> Chicago City Memorial Hospital	.CHICAG120		Hld	P	N			\$936.51	\$0.00	\$0.00	
<input type="checkbox"/> Geneva School District	.GENEVA100		Hld	P	N			\$692.03	\$0.00	\$0.00	
<input type="checkbox"/> Bronson Health Care	.BRONSON110		Hld	F	N			\$651.24	(\$11.06)	\$0.00	
<input type="checkbox"/> Community Hospital/Ritter	.COMMU100		Hld	P	N			\$190.08	\$0.00	\$0.00	
<input type="checkbox"/> University of Illinois	.UNIVER100		Hld	P	N			(\$97.95)	(\$272.20)	\$0.00	
<input type="checkbox"/> Designed for Dirt	.DESIGN100		Hld	P	N			\$77.07	\$0.00	\$0.00	
Summary Totals:								76,295.97	-1,057.55	0.00	

Customer List Options

 Show Delinquent Customers Only
 Show CreditHold Customers Only
 Show Zero Balance Customers
 Show Tagged Customers Only

Show All Customers
 Only Customers for SalesOffice ->
 Only Customers for Salesman ->
 Only Customers for Pmt Group ->

PmtGroup Master Acct

A/R Call Filters

 Only Show Selected A/R Caller?
 Only Show Selected A/R Call Mgr?

Connected to Server: STEP1 Software v7.3841 Chicago CMS

View Customer Info

A/R Collection Info

Enter Customer Payment

Enter Group Payment

Tag/UnTag Selected Cust

Modify Statement Comments

Send Statement

To Highlighted Customer

To All Tagged Customers

To Selected Pmt Group

Setup A New Customer

Modify Customer Info

Age All Customer Accounts

Aged (D): 19-Apr-2017

Enter Balance Adjustment

Print/Save To File

Current Delinquent CreditHold

26 Customers

Refresh Customer List

Freeze Customer Name

To Sort, Search or Total, RightClick on that column.



Select CRM Prospect

Options Search

Prospect Name	Address1	Address2	City	State	SalesRep	
▶ test another new prospect 456	address 456		Fungus Flats	MN	WALLY	^
test new prospect 345	address 345		Sartel	MN	WALLY	
test new prospect 678					WALLY	



Web App Enhancements



Current Web App Products

- Web Sales Rep – Order entry tool for your field sales reps
- Supply Usage Manager (SUM) – Overview tool for your large, multi-location customers
- Customer Self Service – (CSS) – Special-case order entry tool, usually for larger accounts



Web Sales Rep Enhancements



Web Sales Rep Enhancements

- Make quantity and price changes to existing orders, and be able to add customer PO#



Web Sales Rep Enhancements

- Make quantity and price changes to existing orders, and be able to add customer PO#
- Add new item(s) to existing orders



Web Sales Rep Enhancements

- Make quantity and price changes to existing orders, and be able to add customer PO#
- Add new item(s) to existing orders
- Convert Quote to Order



Web Sales Rep Enhancements

- Make quantity and price changes to existing orders, and be able to add customer PO#
- Add new item(s) to existing orders
- Convert Quote to Order
- (New) Customer Minimum Order Charge enforced (if being used)



WSR: Add PO to existing order

STEP1 Supply Co. (v7.38 Test) Aircraft Supply Wally Widget Account ▾ A

Aircraft Supply

- Customer Notes
- Contacts
- Addresses
- Documents
- Pending Orders 78
- Pending Quotes 11
- Open Invoices 9
- Invoice History
- Sales History
- Customer Products

Shipping Instructions:

(none) FOB: Ship Point
Carrier: PSS Truck
Warehouse: STEP1 Supply Chicago

Order Date	PO	Status	Rep	Source	Ready to Ship	Ready to Bill	Shipped
17-Nov-2016	<input type="text" value="AB6504"/>	CreditHold	Wallace Semper	Web-WALLY	N	N	N

[cancel](#)

Line	Item	Type	Qty Ordered	Qty Shipped	Qty B/O	Price Src	Margin	Amount	
1	YA005 All Purpose Cleaner	I	1	1	-	\$7.05 b1	70.5%	\$7.05	edit
2	Can								
3	* SDS 551 Required *								
4	NB-608341 Dust Mop Treatment	I	2	2	-	\$7.50 D10	66.7%	\$15.00	edit
5	Can								

Web Sales Rep



WSR: Change Price/Qty on order line

STEP1 Supply Co. (v7.38 Test) Aircraft Supply Wally Widget Account ▾ A

Aircraft Supply

- Customer Notes
- Contacts
- Addresses
- Documents
- Pending Orders 78
- Pending Quotes 11
- Open Invoices 9
- Invoice History
- Sales History
- Customer Products

Line	Item	Type	Qty Ordered	Qty Shipped	Qty B/O	Price Src	Margin	Amount	
1	YA005 All Purpose Cleaner	I	<input type="text" value="1"/>	1	-	<input type="text" value=""/> one-time? <input checked="" type="checkbox"/> b1 \$7.05	70.5%	\$7.05	<input type="button" value="SAVE"/> cancel
Edit Price:									
<input type="button" value="Customer Default"/>		<input type="button" value="Clear"/>							
<input type="button" value="B1"/> 7.05	<input type="button" value="B2"/> 5.43	<input type="button" value="B3"/> 4.50	<input type="button" value="B4"/> 4.16						
<input type="button" value="B5"/> 3.79	<input type="button" value="B6"/> 3.79	<input type="button" value="B7"/> 3.47	<input type="button" value="B8"/> 3.20						
<input type="button" value="Item (Qty Break)"/>									
2	Can								
3	* SDS 551 Required								
	*								
4	NB-608341 Dust Mop Treatment	I	2	2	-	\$7.50 D10	66.7%	\$15.00	edit
5	Can								

Web Sales Rep



WSR: Add new items to existing order

STEP1 Supply Co. (v7.38 Test) Aircraft Supply

Wally Widget Account A

Aircraft Supply

- Customer Notes
- Contacts
- Addresses
- Documents
- Pending Orders 78
- Pending Quotes 11
- Open Invoices 9
- Invoice History
- Sales History
- Customer Products

Search for item to add:

pa [cancel](#)

- BUC-5013-1000 - Papercraft/A.W. Mendenhall
1 Ply Jumbo Tissue 12/Case
- PBM5002 - Papercraft/A.W. Mendenhall
2 Ply Toilet Tissue 96/Case 500 sheets
- 612944 - Nobles [14-Jun-2009]
2001 Speed Scrub Pac 20" Pad driver automatic sc
- BS394018 - Stens [10-May-2008]
Carb air element B&S
- CX100001 - Nobles [08-Feb-2013]
GASKET VAC MOTOR 7.2
- MM100000 - Minuteman [08-Feb-2013]
MTNG BRKT QIK DISC 11 GA
- 5205002 - Stens [10-May-2008]
Oil filter

<i>Merchandise Total:</i>	\$108.48
<i>Sales Tax:</i>	\$6.81
<i>Frt Surcharge:</i>	\$5.00
<i>Total Due:</i>	\$120.29
<i>Gross Profit:</i>	\$86.40
<i>Order Margin:</i>	79.6%

Web Sales Rep



WSR: Convert Quote to Order

STEP1 Supply Co. (v7.38 Test)
Bronson Health Care

Wally Widget Account ▾ A

Bronson Health Care

Customer Notes

Contacts

Addresses

Documents

Pending Orders 57

Pending Quotes 10

Open Invoices 5

Invoice History

Sales History

Customer Products

Phone: (800) 553-2602 - Fax: (805) 499-7783
Sales Rep: Geoff Jonas

Bill To: Bronson Health Care Ship To: Bronson Health Care
1 N Bronson Avenue 1 N Bronson Avenue
Rosemont, IL 46952 Rosemont, IL 46952
Acct #: BRONSON100

Quote Date	Valid Until	PO Number	Rep	Source	
13-Nov-2012	-	edit PO	Geoff Jonas	Web-WALLY	convert to order

Line	Item	Type	Qty Quoted	Price Src	Margin	Amount	
1	RA008 Disinfectant Spray	I	3	\$7.20 D20	62.6%	\$21.60	edit
2	Can						
3	A859 Formula X Gel Stripper	I	4	\$9.98 S	69.5%	\$39.92	edit
4	Can						
5	* MSDS Sheet A859 Required *						
6	5121	I	1	\$41.46	27.0%	\$41.46	edit

Web Sales Rep



WSR: Minimum Order Chg Warning

STEP1 Supply Co. (v7.38 Test) cart expires 02-May-2017
Bronson Health Care Checkout ▶ Wally Widget Account ▾ A

Cust Prods | CSS

3 mos | 12 mos | Due

Vendor Managed

Inventory | Sale

Special Item | Prev

Reference Items

Cart Summary

A Minimum Order Fee of \$20.00 will be added to Orders Under \$100.00

Item Code / Description	Type	Avail	Price/Mrgn/Src	Order Qty	Amount	
<u>SHINE-CONC-D</u> <i>Crown Technologies</i> Shine Glass Clnr - ConcentrateD D Cap Blending Concentrate,Gal	I	-28	\$17.64 gal 24.3% S CProd	3 gal	\$52.92	EDIT...
ITEM SUB-TOTAL:					\$12.85 GP 24.3%	\$52.92

[ADD description below](#)

[Clear this cart](#)

[Checkout](#)

Web Sales Rep

this cart has 1 line



WSR: Minimum Order Chg Warning

STEP1 Supply Co. (v7.38 Test) | \$53 (1) * | Wally Widget Account A
Bronson Health Care | Cart ▶

Cust Prods	CSS	
3 mos	12 mos	Due
Vendor Managed		
Inventory	Sale	
Special Item	Prev	
Reference Items		

Cart Checkout

PO Number:

Target Ship Date:

Order Handling:
 Is Rush Order

Warehouse:

Cart/Order Notes:

Additional Email Confirmation:

Ship-To:
(Billing Address)
Bronson Health Care
1 N Bronson Avenue
Rosemont, IL 46952

A Minimum Order Fee of \$20.00 will be added to Orders Under \$100.00

Web Sales Rep this cart has 1 line



Development Partners



Development Partners

- J&M Catalog – Online Catalog & Order Entry for your customers. Print catalog creator.
- Rep Tool Kit – Web app interfaces to STEP1
- 88 Graphics – Marketing, Branding, Logo Development, Websites
- JMC – EDI, Rebate Management, Proof of Delivery, Essendant PO interface
- On Point – Video Library and Organizer
- Charge It Pro – Credit Card interface



Breakout Sessions



Breakout Sessions

- Anybody can attend any session, but...



Breakout Sessions

- Anybody can attend any session, but...
- Many courses are designed to either be beginner or advanced.



Breakout Class Comments



Breakout Class Comments

- Hal's Strategic Market Pricing class...



Breakout Class Comments

- Hal's Strategic Market Pricing class...
- Let's not forget, we are at war with Staples, Office Depot and the like.



Breakout Class Comments

- Hal's Strategic Market Pricing class...
- Let's not forget, we are at war with Staples, Office Depot and the like.
- One of the ways we can differentiate ourselves from them is by being experts in Market Group segments



Breakout Class Comments

- Hal's Strategic Market Pricing class...
- Let's not forget, we are at war with Staples, Office Depot and the like.
- One of the ways we can differentiate ourselves from them is by being experts in Market Group segments
- This is the first step in an important sequence of defenses for the independent distributor.



THANK YOU! Have a great day