

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



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)



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.





On any device, visit SUGM central





v7.37



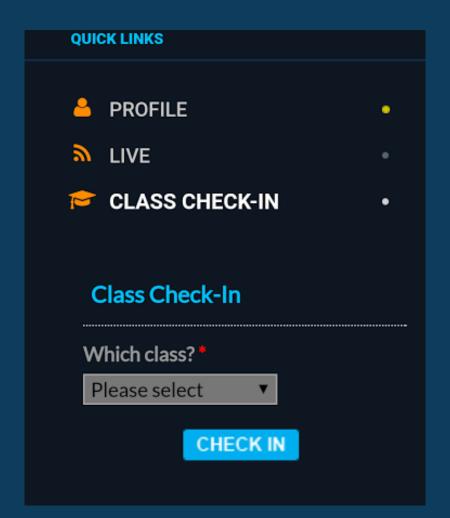
- On any device, visit SUGM central
- SUGM Live is your real time tool for what's happening



- 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





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
- Language 1 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



• SNAP Level 2

- SNAP Level 2
- CRM Enhancements

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- 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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- Enhanced A/R Balance Adjustments procedure
- New 'STEP1 Report Archives' procedure

- SNAP Level 2
- CRM Enhancements
- Web Sales Rep, Supply Usage Manager, and Customer Self Service enhancements
- New 'Convert Quote to Order' procedure
- Enhanced A/R Balance Adjustments procedure
- New 'STEP1 Report Archives' procedure
- New 'Minimum Order Charge' procedure

New way to reach support – 'Ask Support'

- 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





Resale Certificate attached to a Customer



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



- Resale Certificate attached to a Customer
- Customer PO attached to the order
- Web page, brochures attached to inventory items



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- Photo of damaged arrivals from Vendor to PO



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- 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 note created for each customer that your A/R staff needed to call.



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- Allows 'To-Do' to be set up to double check customer's promises.
- (example)



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 1 organizes informational (after the fact) Notes for historical reference.



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- SNAP Level 2 Allows collaboration between staff members as events are happening, rather than after the fact.



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



- 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?





Inbound item from vendor damaged.



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



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



- 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



- 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!



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- 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!





Hospital is expanding! Need new equipment.



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



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



- 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

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 - 'Attention' This means the note is relevant to them



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 - 'FYI' This means the note may be of interest to them



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 - '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. — □ ×								
<u>F</u> ile	<u>S</u> earch Saved <u>Q</u> ueries	<u>H</u> elp						
Refresh All Tab Counts [F10] Check for Tray Alert every 5 m					Test Tray Alert	Server L	.ocal <u>T</u> ime:	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								
ПП	Last Update	LastUpdateBy	Author	Торіс	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 Whee Auto - Jan 2017 thou	ights	
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 F	L	
N	9-Sep-2016 7:07am	BOB	BOB	Sales		Determine which PL customers have Dimens	ions	
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		
Topic Filter ☐ All Topics ☐ One Topic ☐ Show All of My Notes/Docs? Urgent 1 Open t Clos								
Connected to Server STEP1 Software v7.3841 CMS BOB								



View Note File Search WA Phase 3 - Shoroom sales & Will Call ☐ Mark as <u>U</u>nViewed <u>M</u>odify Note E<u>x</u>it 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 Υ 22-Feb-2017 11:13am Available 3-Jul-2016 Force User ReView Attn HAL Hal Frutiger 24-Feb-2017 1:41pm Available Force ALL Users to ReView Attn MARK Mark Drengson 21-Feb-2017 12:31pm Available Last Note Update: 21-Feb-2017 12:26pm BOB Refresh Attn/FYI User List 3 Users

>





 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.



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- 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 for Users



- SNAP for Users
- SNAP for Supervisors



- SNAP for Users
- SNAP for Supervisors
- Advanced SNAP





 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).



 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.



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- We have designed an interface called STEP1
 Simple Storage Services (S4), that makes it easy to upload and link to cloud storage.



- 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 \$4 interface fee plus cloud storage fees.



• S4 cloud storage is very affordable...



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



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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.



- 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)





• \$25/month, no up front fees





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



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



- 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



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

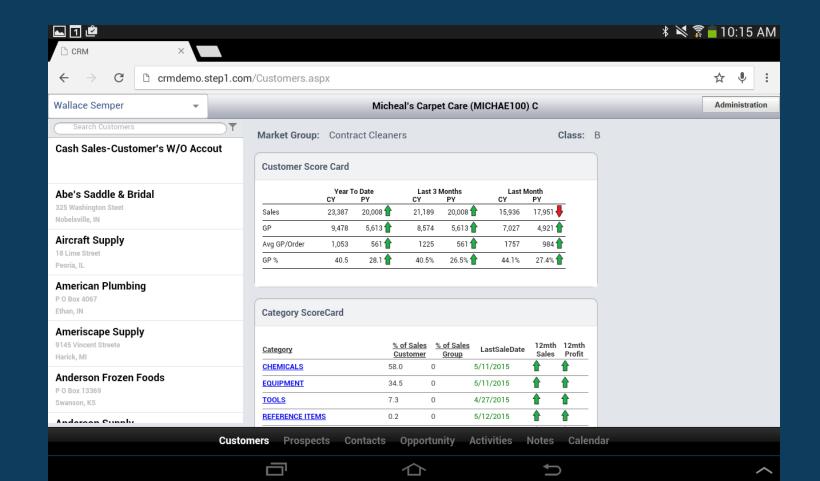


- CRM is now local on your database rather than in the cloud...
 - Contacts changed or added in CRM are updated directly in your STEP1 database. (You can flag this to only affect sales contacts)

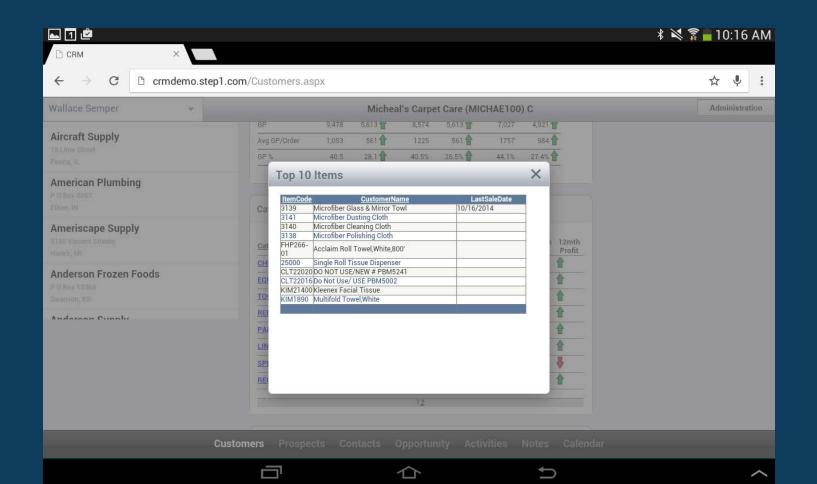


- CRM is now local on your database rather than in the cloud...
 - Contacts changed or added in CRM are updated directly in your STEP1 database. (You can flag this to only affect sales contacts)
 - Notes entered for a customer in CRM are attached to that customer as a SNAP note.

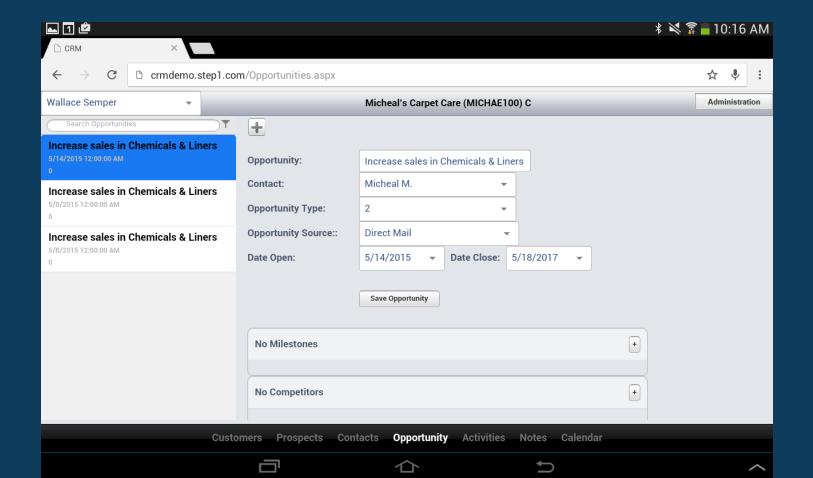




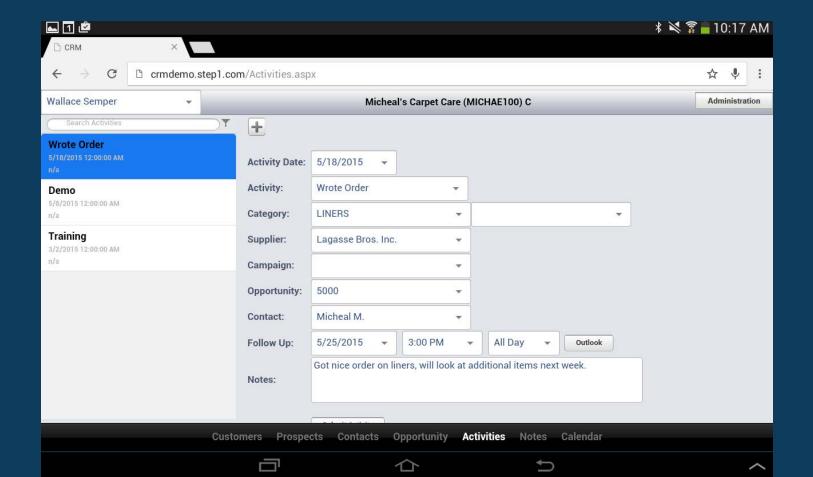




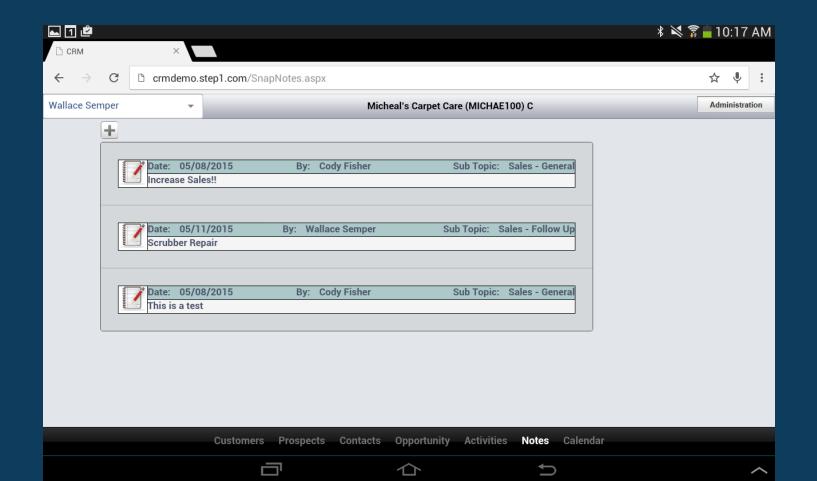














Turn Prospect into a Customer



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



	100	A/P Mana	ger * STEP1 Supply (`o /u/7 29 Tes	c+\									- D X	
File Search Reports Utilities SavedQueries Help															
Tag All Listed Customers	Ctrl+T		g Orders Unposted Payments Invoice History								.1				
UnTag All Customers	Ctrl+U	g	g CustomerName			PmtGroup			A/R Caller	Followup	Total Due	Current	31-45 Days 41 ^	<u>V</u> iew Customer Info	
Send Instant Message	F11		Richmond High School		.RICHM0100			N			\$17,173.78	\$0.00	\$0.00	A/R Collection Info	
Maximize/Restore	F12		Society of St Vincent De Paul		.STVINC100		HId P N			\$9,514.55		\$0.00 \$0.00		Titti dojiodani mio	
Modify Your User Info	Ctrl+F12		DirtQuest Cleaning Service		.DIRTQU100 .UNIVER110		HId P N			\$7,674.81		\$0.00	\$0.00	Enter Customer Payment	
· · · · · · · · · · · · · · · · · · ·	Cuitiliz	_	University of Indianapolis Semtech, Inc		.SEMTEC10(HID P N			\$5,295.61 \$3,974.98		(\$24.15) (\$26.62)	\$0.00 \$0.00	Enter Group Payment	
Convert CRM Prospect to Customer		Donnelly & Compa			.DONNEL10		HId F				\$3,898.39	\$0.00	\$0.00		
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Exit	Ctrl+E				DELANE100		HId F				\$3,630.35	\$0.00	\$0.00	Modify Statement Comments	
			Supply Company		.INDUST100		HId F	N			\$3,144.43	\$0.00	\$0.00	Send Statement	
		Johnsto	n's Commercial Floorin	ng	JOHNST100		HId F	N			\$3,139.55	\$0.00	\$0.00	To Highlighted Customer	
			Garrisons Engineering Dingmans Sporting Goods		.GARRIS100		HId F			19-May	\$3,085.90	(\$21.18)	\$0.00	To All Tagged Customers	
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	St Pauls Catholic Academy St Pauls Catholic Academy Aircraft Supply				.STPAUL100		HId F				\$1,572.93	\$0.00	\$0.00	Setup A New Customer Modify Customer Info	
					.AIRCRA100		HId F				\$1,090.09	(\$191.18)	\$0.00		
	-		ect Service Inc		.DIRECT100		HId F				\$1,201.25	\$0.00	\$0.00	Modify Customer Info	
			Carpet Care	A A	.MIKES110 M	IIKES	HId F				\$1,172.13	\$0.00	\$0.00		
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					.GENEVA100		HId F				\$692.03	\$0.00	\$0.00		
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					.UNIVER100		HId F				(\$97.95)	(\$272.20)	\$0.00	Aged (D): 19-Apr-2017	
					.DESIGN100		HId F				\$77.07	\$0.00	\$0.00	Enter Balance Adjustment	
		Summa	Summary Totals:								76,295.97	-1,057.55	0.00	Print/SaveToFile	
Summary Totals.									-	10,200.01	1,007.00	>	Current Delinguent CreditHold		
	-0	Customer List C									26 Customers				
		Show Delinquent Customers Only Show A				v All Customers			PmtGroup Master Acct			l Filters	Refresh Customer List		
		Show Zero Balance Customers Only C			Customers for SalesOffice ->			(Enter S/O Code)			Only Show Selected A/R Caller?			Freeze Customer Name	
					Only Customers for Salesman ->		(Enter Sman Code)				Only Show Selected A/R Call Mgr?			To Sort, Search or Total,	
		Show Tagg	ed Customers Only	Only Customers for Pmt Group ->		(Enter Pmt Group)			roup)				RightClick on that column.		
	Co	Connected to Server						STEP1 Software v7.3841 Chicago CMS							



💗 Select CRM Prospect

Options Search

	Prospect Name	Address1	Address2	City	State	SalesRep	^
Þ	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	

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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





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



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



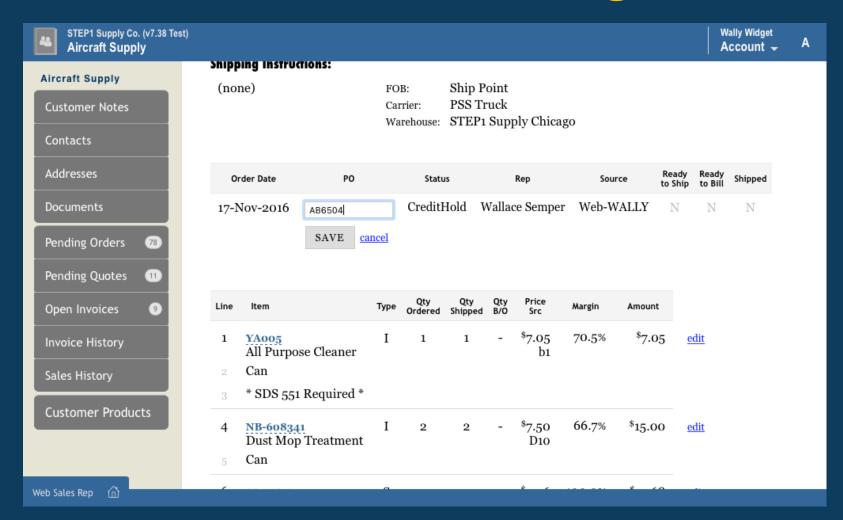
- Make quantity and price changes to existing orders, and be able to add customer PO#
- Add new item(s) to existing orders
- Convert Quote to Order



- 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)

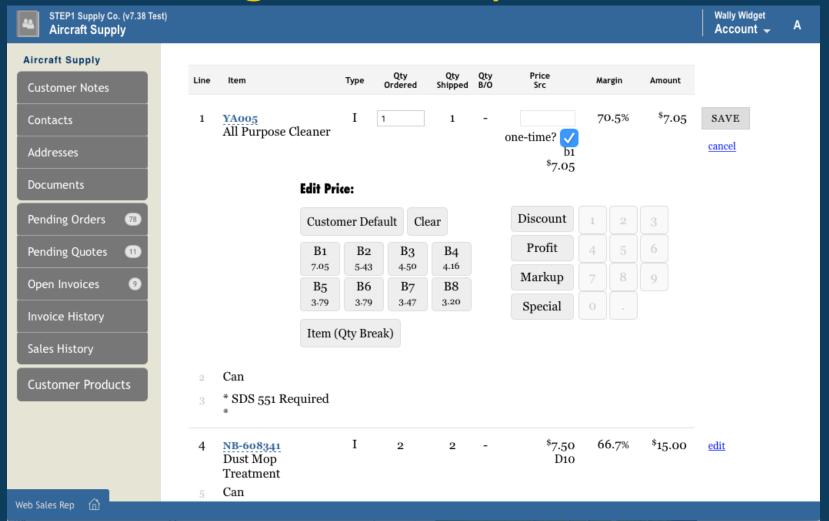


WSR: Add PO to existing order



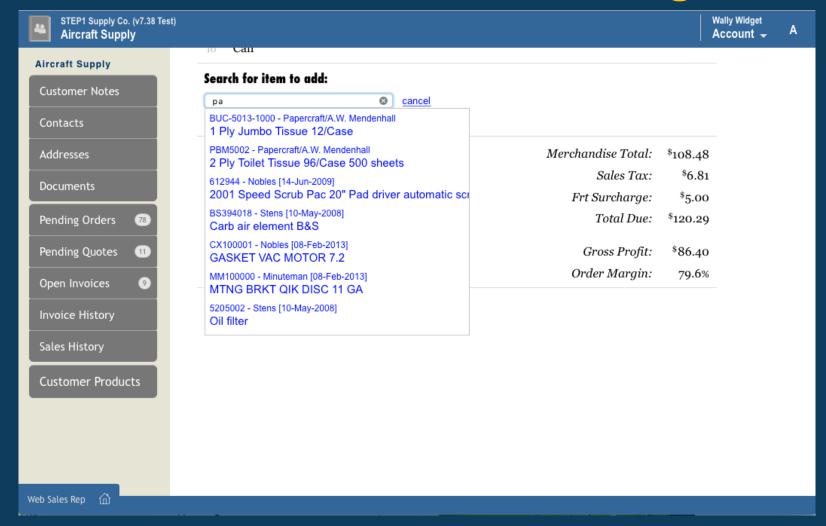


WSR: Change Price/Qty on order line



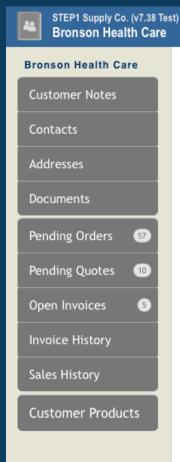


WSR: Add new items to existing order





WSR: Convert Quote to Order



Web Sales Rep

3

6

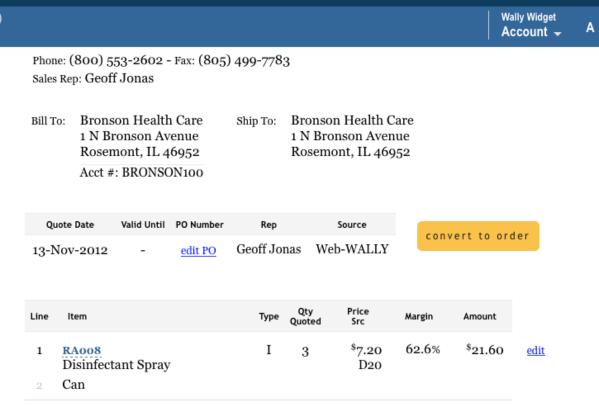
A859

Can

5121

Formula X Gel Stripper

* MSDS Sheet A859 Required *



Ι

\$9.98

\$41.46

69.5%

27.0%

\$39.92

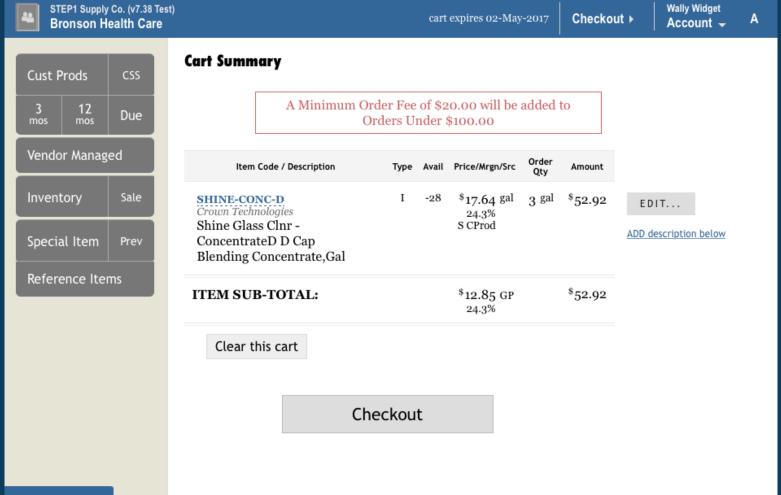
\$41.46

edit



Web Sales Rep

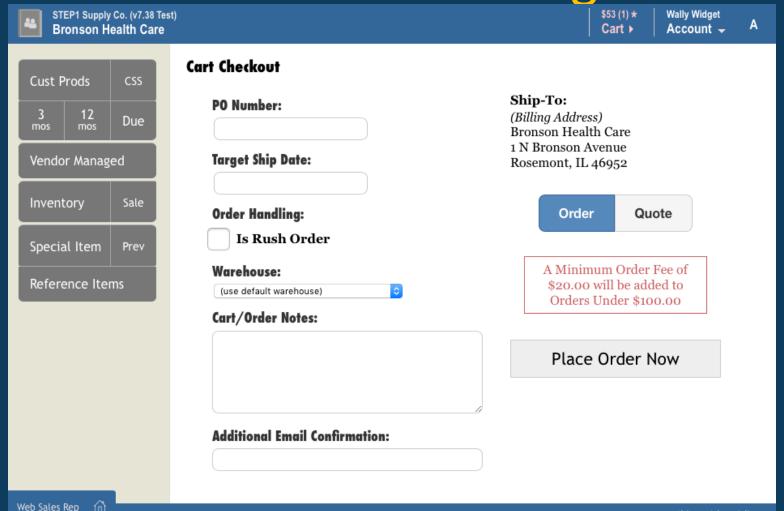
WSR: Minimum Order Chg Warning



this cart has 1 line



WSR: Minimum Order Chg Warning



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.





Hal's Strategic Market Pricing class...



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



- 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



- 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