

Tuesday





Breaks & Lunch – Same as yesterday.



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- Dinner Tonight, Splitting again:
 - Doc Ford's (green)
 - The Pointe (orange)



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- Logistics the same for The Pointe, shuttles run 5:30-6:15



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- Dinner Tonight, Splitting again:
 - Doc Ford's (green)
 - The Pointe (orange)
- Logistics the same for The Pointe, shuttles run 5:30-6:15
- After Party again tonight, 8:00-10:00





• Tomorrow we will be having Breakout Sessions only, no general meeting.



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- Mid morning break and lunch as usual.



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- Mid morning break and lunch as usual.
- Last session ends at 2:55pm



This Year's Venue:



This Year's Venue:

• So.... What did you think?





• (assuming you like South Seas...)



- (assuming you like South Seas...)
- We will do a 3 year rotation:



- (assuming you like South Seas...)
- We will do a 3 year rotation:
 - Sanibel Harbour
 - South Seas
 - Somewhere Else





 Needed to find something completely different than what we have done



- Needed to find something completely different than what we have done
- Needed to find something fun, interesting



- Needed to find something completely different than what we have done
- Needed to find something fun, interesting
- Needed to find a spot that many of you might not yet have experienced....



• Needed to find something comfortable & easy



- Needed to find something comfortable & easy
- Easy? Did I say Easy??



• Needed to find something comfortable & easy

• Easy? Did I say Easy??

I meant to say EASY



- Needed to find something comfortable & easy
- Easy? Did I say Easy??
- I meant to say the BIG EASY



We're Headed to New Orleans!



We're Headed to New Orleans!

• We'll be staying in the heart of the French Quarter



We're Headed to New Orleans!

- We'll be staying in the heart of the French Quarter
- At the Omni Royal Orleans Hotel



We're Headed to New Orleans!

- We'll be staying in the heart of the French Quarter
- At the Omni Royal Orleans Hotel
 - Located just 1 block from Bourbon Street
 - World class restaurants within a couple blocks
 - Many interesting shops and museums



























Royal Orleans Rooms:

• Wifi is included-no resort fee! Sign up w/Omni



Royal Orleans Rooms:

- Wifi is included-no resort fee! Sign up w/Omni
- Our rate for 'normal' convention rooms is \$175/night for a Queen room (one bed) \$185/night for a King room \$199/night for a Double Double



- Wifi is included-no resort fee! Sign up w/Omni
- Our rate for 'normal' convention rooms is \$175/night for a Queen room (one bed) \$185/night for a King room \$199/night for a Double Double
- There are several other room types that you might be interested in...



\$265/night King with Balcony
 \$275/night Double Double with Balcony

- \$325/night Petite Suite
- \$425/night Superior King Suite
- \$525/night Superior King Suite w/Balcony



• Like last year, we are giving you attendees first 'dibs' on the rooms.



- Like last year, we are giving you attendees first 'dibs' on the rooms.
- You can Pre-Register *now* on your app, and select the room type that you would like.



- Like last year, we are giving you attendees first 'dibs' on the rooms.
- You can Pre-Register *now* on your app, and select the room type that you would like.
- Like last year, we won't complete the registration until January, this just gives you the opportunity to save the room type you want.





 If you are new with STEP1, be assured you can stay with us for years, even decades, and still have the most current, modern system in the industry.



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- Each year we hand out Milestone Awards to commemorate customer's key anniversaries



- If you are new with STEP1, be assured you can stay with us for years, even decades, and still have the most current, modern system in the industry.
- Each year we hand out Milestone Awards to commemorate customer's key anniversaries
- For each group please hold applause until the end, and each group please pause for a picture



Awards being presented today are only for those actually here.





- Hearn Paper



- Hearn Paper
- Sun State Janitorial Products



- Hearn Paper
- Sun State Janitorial Products





• None this year!



- None this year!
- Bunch of slackers!





• Tartan Supply



• Tartan Supply





• Janitor's Closet



- Janitor's Closet
- Retailer's Supply



- Janitor's Closet
- Retailer's Supply
- San-A-Care



- Janitor's Closet
- Retailer's Supply
- San-A-Care





• Reinert Paper & Chemical



- Reinert Paper & Chemical
- Wedge Supply



- Reinert Paper & Chemical
- Wedge Supply





 Button added to the Pending Quotes tab in Order Desk



- Button added to the Pending Quotes tab in Order Desk
- And button added when viewing a quote in Web Sales Rep



• When converting quote to order, it will:



When converting quote to order, it will:
 – Reset Order Date to Today & clear the Target Ship Date



When converting quote to order, it will:

 Reset Order Date to Today & clear the Target Ship Date
 Change Order Status to 'New Order'



- When converting quote to order, it will:
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 - Do a full cost refresh including Rebate Costs



'Convert Quote to Order' Procedure

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 - Do a full cost refresh including Rebate Costs
 - Reserve Stock Levels



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 - Send out normal 'new order' alerts



'Convert Quote to Order' Procedure

- When converting quote to order, it will:
 - Reset Order Date to Today & clear the Target Ship Date
 - Change Order Status to 'New Order'
 - Do a full cost refresh including Rebate Costs
 - Reserve Stock Levels
 - Send out normal 'new order' alerts
 - It will NOT auto send an order confirmation. This is left under your control





 Users can select an adjustment 'Reason' from a lookup table



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- This will allow Management to study why A/R balances are being adjusted



- Users can select an adjustment 'Reason' from a lookup table
- This will allow Management to study why A/R balances are being adjusted
- Users can now select an 'Approved By' user to indicate who approved the balance adjustment





 You can now archive G/L reports to the cloud (requires S4 Cloud Interface)



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- New 'Save to STEP1 Report Archives' printer option supported for all G/L reports in the G/L module.



- You can now archive G/L reports to the cloud (requires S4 Cloud Interface)
- New 'Save to STEP1 Report Archives' printer option supported for all G/L reports in the G/L module.
- New 'Report Archives' tab in G/L Module to view or print any archived report.





 We're not playing favorites! Essendant has a national scope, and can provide you with an accurate file of what all of your costs actually are.



Enhanced Import/Update capabilities:



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 Item groups can be imported as either Inventory Items or Reference Items



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- Import Control at Primary Category Level:
 - JanSan, Office Supplies, Food Service, etc
 - Then choose Active, Non Stock, new items



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- Import Control at Primary Category Level:
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 - Then choose Active, Non Stock, new items

Essendant's ICAPS system allows customized downloads



😻 STEP1 System Maintenance Utility * TRI-VALLEY SUPPLY – 🗆 🗙											
File Logs Search Reports SavedQueries Help											
9	ystem	Reference	ce Item Import Essendant Item Im	port/Update	SD Parts Impo	rt/Update Da	ta Import Procedures	Cycle Count Sta	rtup Utilities SNAP Memo/Note	Conversion S	a + +
			ry Import Controls								
Г	Code Category Description Active Items			NonStock Items New Items		For Speed reasons, ALWAYS run this procedure on your Step1 Server.					
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	05-51-52-09 CHEMICALS					CHEMICALS		GLASS & SURFACE CLEANERS		95-ESSEND	
	05-51-52-10 CHEMICALS					CLEANING CHEMICALS			KITCHEN CLEANERS		DA 🗸
c											>
Refresh SubCat List for Selected Level1 Category Change Step						1 SubCat for Highlighted Essendant Category			Set One Step1 SubCat for All Listed Essendant Cats		
Essendant Item Update Options ✓ Update PD Cost for Items with Essendant as Primary Supplier ✓ Update Alt PD Cost for Items with Essendant as Alternate Supplier ☐ Reset Standard Costs to new imported costs (Only if Primary Supplier). ✓ Update Item List Price (and recalc Bracket1 %) (Only if Primary Supplier). ☐ Update Item Sub-Category based on SubCat Cross Reference table. ✓ Flag Discontinued Items as Obsolete (or Discontinued if still in stock).						Essendant New Item Import Options New ItemCode Prefix: New Item Description Opt: S=Use Short Desc, L=Long Desc (1st 60 chars), C=Long Desc with overflow into Comments.			Stock Facility: LOS A-LCA-39 Last Update: Fri 16-Sep-2016 8:19pm Import/Update Essendant Items		
C	nnect	ed to Ser	ver			STEP1 Sof	tware v7.3755	TRIVALLEY	CMS		





• History...



• Minimum Order Charge can be segregated by ABC rank of the customers.



- Minimum Order Charge can be segregated by ABC rank of the customers.
- Each 'rank' has a Charge, and a Description



- Minimum Order Charge can be segregated by ABC rank of the customers.
- Each 'rank' has a Charge, and a Description
- Minimum Order Charge appears:
 - In CSS for the Customer to see
 - In WSR for the Sales Rep to see
 - In Order Desk for Customer Service to see



- Minimum Order charge is:
 - Mandatory on CSS
 - Mandatory on WSR
 - Optional on Order Desk



- Minimum Order charge is:
 - Mandatory on CSS
 - Mandatory on WSR
 - Optional on Order Desk
- Let's go thru some examples:



• Example: 'D' Account threshold is \$250 order minimum, with a \$50 Minimum Order charge



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- If customer tries to submit a \$150 order, it will add the \$50 fee to the order.



- Example: 'D' Account threshold is \$250 order minimum, with a \$50 Minimum Order charge
- If customer tries to submit a \$150 order, it will add the \$50 fee to the order.
- Same with Web Sales Rep. The rep cannot override or eliminate the fee.



- Example: 'D' Account threshold is \$250 order minimum, with a \$50 Minimum Order charge
- If customer tries to submit a \$150 order, it will add the \$50 fee to the order.
- Same with Web Sales Rep. The rep cannot override or eliminate the fee.
- Order Desk will be alerted to the situation, but they can override and ignore the fee.



 Example: 'B' Account threshold is \$200 minimum, \$25 fee



- Example: 'B' Account threshold is \$200 minimum, \$25 fee
- All order platform responses are the same.



- Example: 'B' Account threshold is \$200 minimum, \$25 fee
- All order platform responses are the same.

 Example: 'A' Account threshold is \$150 minimum, with a \$0 fee

...but with a message asking them to please consider adding to their order



• If a fee is assessed, it will appear on the invoice in the 'Miscellaneous Charge' field.



- If a fee is assessed, it will appear on the invoice in the 'Miscellaneous Charge' field.
- So if you are currently actively using that field, then you may not be able to use the 'Minimum Order Charge' feature.



Support Department Report



Support Department Report

• Gerry Human, VP

Support Department Report

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			utheran Church		_	Urgency: Standard Step1 Version: 7.38	
П	AIRCRA100	-				Step1 Module: ORDERDESK	n
П	ALLNV100	All Night \	/et			Summary: Essendant Import Option Questions	
	ALLSE100	All Seaso	ns Sports				Ë
	ALTRU100	Altru Floor	r Care			Question/Problem:	
	AMAFLC100	Amazing F	Floor Care			Jeff, We have soem questions about the essendant import options and we would like to know how others are using these tools.	
	AMFLA100	American	Flag Floors				
	AMERI100	American	Plumbing			I'm here until 4pm today and all day tomorrow.	
	AMEWR100	American	Wrench & Tool			Thanks!	FII
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Thank You!

 Have a great day today, a fun night tonight, and a great day tomorrow!!!





• Designed for Multi Location accounts.

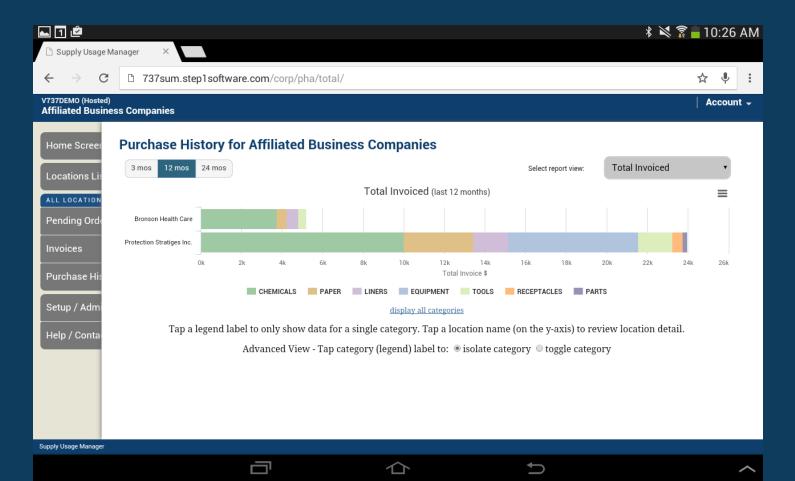


- Designed for Multi Location accounts.
- Helps you with all 3 issues for major accounts:
 - Budget control by location
 - Theft control by item by location
 - Item use compliance by location



- Designed for Multi Location accounts.
- Helps you with all 3 issues for major accounts:
 - Budget control by location
 - Theft control by item by location
 - Item use compliance by location
- …and goes to new levels to service the customer with information







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Home Screen	Product Monthly Usa	ige for Af	filiated	Busir	ness C	ompa	nies							
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Pending Orders 4	CHEM: Aerosols	-	-	-	-	-	-	-	\$102.72	-	\$130.20	-	-	\$232
Invoices •1,594	A985 Citrus Cleaner/Deodorizer	-	-	-	-	-	-	-	-	-	\$ 79.80 12	-	-	^{\$} 79.
Purchase History Setup / Admin	YA007 Stainless Steel Cleaner	-	-	-	-	-	-	-	\$ 102.72 12	-	\$ 50.40 12	-	-	^{\$} 153.
	CHEM: Air Fresheners	-	\$98.93	\$35.00	\$39.11	\$109.11	\$78.22	\$43.32	-	\$253.22	\$253.22	-	-	\$910
Help / Contact Info	5121 Citrus Gel Air Freshener	-	\$ 33.95 1	-	\$ 39.11 1	\$39.11 1	\$ 78.22	-	-	\$78.22 2	\$78.22 2	-	-	^{\$} 346.
	5131 Lemon/Lime gel air freshener	-	\$ 64.98 3	-	-	-	-	\$ 43.32 2	-	-	-	-	-	^{\$} 108.
	07908-12 Tropical Tradewinds Metered	-	-	\$ 35.00 1	-	\$ 70.00 2	-	-	-	\$ 175.00 5	\$ 175.00 5	-	-	^{\$} 455.
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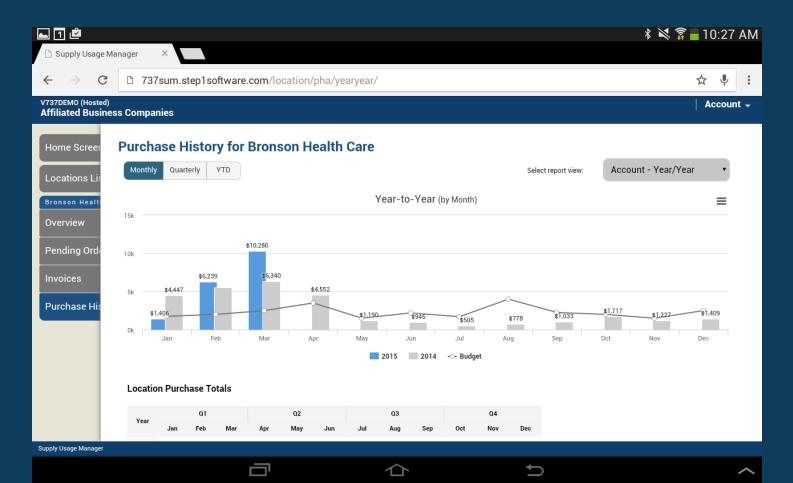


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Pending Orders 4	CHEMICALS	CHEM: Aerosols	A985	Citrus Cleaner/Deodorizer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
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Purchase History	CHEMICALS	CHEM: Air Fresheners	5121	Citrus Gel Air Freshener	0.00	33.95	0.00	39.11	39.11	78.22	0.00	0.0
Setup / Admin	CHEMICALS	CHEM: Air Fresheners	5131	Lemon/Lime gel air freshener	0.00	64.98	0.00	0.00	0.00	0.00	43.32	0.0
Help / Contact Info	CHEMICALS	CHEM: Air Fresheners	07908-12	Tropical Tradewinds Metered	0.00	0.00	35.00	0.00	70.00	0.00	0.00	0.0
	CHEMICALS	CHEM: All Purpose Cleaners	355	All Purpose Cleaner, 1GL	0.00	0.00	0.00	0.00	37.98	0.00	37.98	0.0
	CHEMICALS	CHEM: All Purpose Cleaners	YA003	Baby Powder Spray	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0
	CHEMICALS	CHEM: Carpet Care	06118	All Purpose Carpet Spotter	0.00	0.00	0.00	0.00	0.00	0.00	0.00	141.0
	CHEMICALS	CHEM: Carpet Care	06121	Gum, Tar & Grease Remover	0.00	0.00	0.00	0.00	25.36	0.00	0.00	76.08
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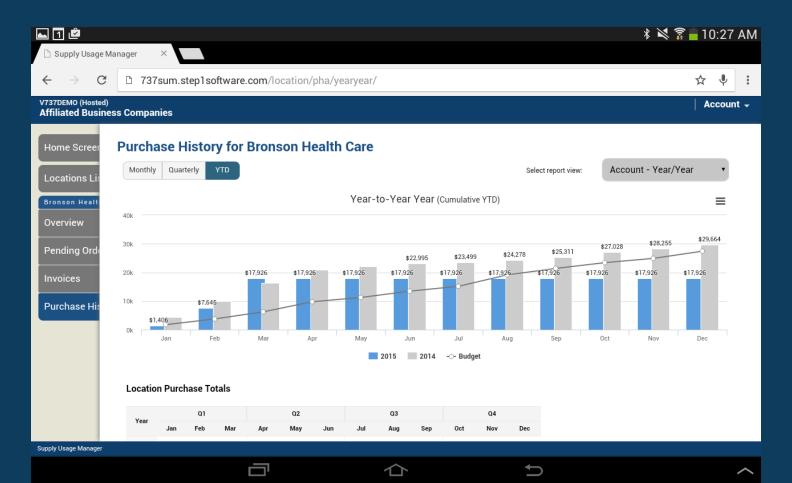
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Setup / Admin	5121 Cftrus Gel Air Freshener	-	\$ 33.95 1	-	\$39.11 1	\$ 39.11 1	\$78.22 2	-	-	\$78.22 2	\$78.22 2	-	-	\$ 346.83 9	
Help / Contact Info	5131 Lemon/Lime gel air freshener	-	\$ 64.98 3	-	-	-	-	\$ 43.32 2	-	-	-	-	-	\$ 108.30 5	bo
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	CHEM: All Purpose Cleaners	-	-	-	-	\$37.98	-	\$37.98	-	-	\$171.84	-	-	\$247.80	
	All Purpose Cleaner,	-	-	-	-	\$ 37.98 6	-	\$ 37.98 6	-	-	\$ 75.96 12	-	-	\$ 151.92 24	gal
Supply Usage Manager															

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 CSS – Customer Self Service – is a 'shopping cart' for your advanced, high end customers



- CSS Customer Self Service is a 'shopping cart' for your advanced, high end customers
- It may only apply to a handful of your customers, but tends to be very useful to your largest accounts who have special order entry needs



• CSS will allow phone based order entry



- CSS will allow phone based order entry
- We envision the customer being able to toss an item into the shopping cart on the fly as they notice the need...



- CSS will allow phone based order entry
- We envision the customer being able to toss an item into the shopping cart on the fly as they notice the need...
- ...then keep on going with whatever they were doing



- CSS will be enhanced to allow phone based use
- We envision the customer being able to toss an item into the shopping cart on the fly as they notice the need...
- ...then keep on going with whatever they were doing
- Tentatively scheduled for 7.38





• We recognize the need for a Single Location version of SUM



- We recognize the need for a Single Location version of SUM
- Same great reports as SUM for a one-location customer.



- We recognize the need for a Single Location version of SUM
- Same great reports as SUM for a one-location customer.
- Still researching this product, tentatively scheduled for 7.38...



Thank You!

 Have a great day today, a fun night tonight, and a great day tomorrow!!!