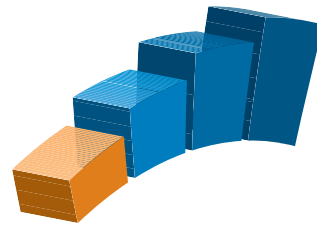# v.7Training

BEFORE TRAINING WITH THIS GUIDE, IT IS BEST TO COMPLETE THE FOLLOWING:

- A/P SETUP
- A/R SETUP
- ITEM SETUP
- TABLE SETUP

STEP1® SOFTWARE SOLUTIONS
ONE STEP AHEAD

CATALOG BUILDER

IN THIS GUIDE

- CREATING A CUSTOMER CATALOG

- CREATING A MARKET CATALOG

TO GET STARTED

OPEN THE FOLLOWING MODULES:
- CATALOG BUILDER

TO SCHEDULE A TRAINING SESSION WITH OUR TRAINING STAFF PLEASE CALL:
1-800-553-2602

MOST MODULE TRAINING SESSIONS TAKE ABOUT AN HOUR

Catalog Builder allows you to create a list of products which you feel this customer should be buying from you, and also include the customer products that are currently being purchased from you. The Catalog feature is a virtual catalog contained in the various STEP1 order entry platforms. It is not a printed catalog. This feature will help direct your Rep, your Customer Service Staff, and the Customer to items that this customer should probably be buying from you. The Catalog will be available for the customer to see in CSS. This will be much easier for the customer than trying to weed through the thousands of items that are contained in your entire inventory.

There are two types of Catalogs you can create. The first is called a 'Customer Catalog', and is intended to be directed at a single customer, or customers connected in a logical way (like individual school buildings that are all part of the same school district). The Catalog Creator was written from the perspective that the individual Sales Rep in charge of this account is probably the right person to create the catalog, so it was designed to be intuitive and easy for the Sales Rep to use.

The second type of catalog you can create is called a 'Market Catalog'. Suppose your company does very well in Medical Clinics. Chances are the items that a Clinic should buy are pretty similar from one to the next. The Catalog Creator allows you to create a catalog for 'Medical Clinics', and then apply it to all customers set up with a Sales Group of 'Clinics'. (Setting up a Market Catalog is restricted to a Catalog Administrator. Sales Reps are not allowed to do this since any Market Catalog would touch other sales people)

You can also easily copy from an existing catalog (of either type) to create a new catalog (of either type). So for example if you had a large Medical Clinic customer that you did a Customer Catalog for, you could copy that, rearrange it as necessary to make it more general for Clinics, and save it out as a Market Catalog. Or, you could copy in the Market Catalog, add items that this particular customer needs, and then save it out as a Customer Catalog.

Catalog Item Pricing is all driven by Customer Price Manager. STEP1 uses dynamic pricing, so when you or your customer goes into Order Entry, all pricing they see (including Customer Products and Catalog) are generated at that moment based on however you have the Price Manager policies set.

Catalog Builder

Setting up a Customer Specific Virtual Catalog

Let's start by creating a customer specific catalog. Click the Setup a New Customer Catalog button to begin.
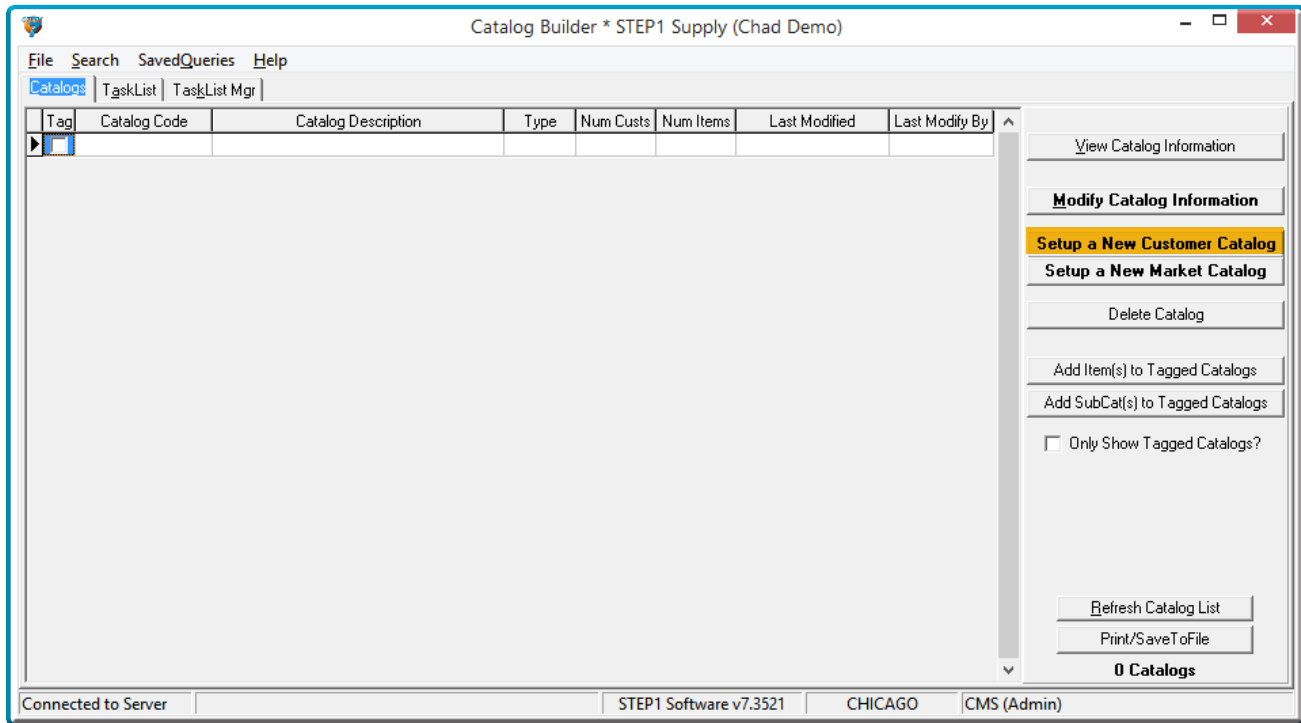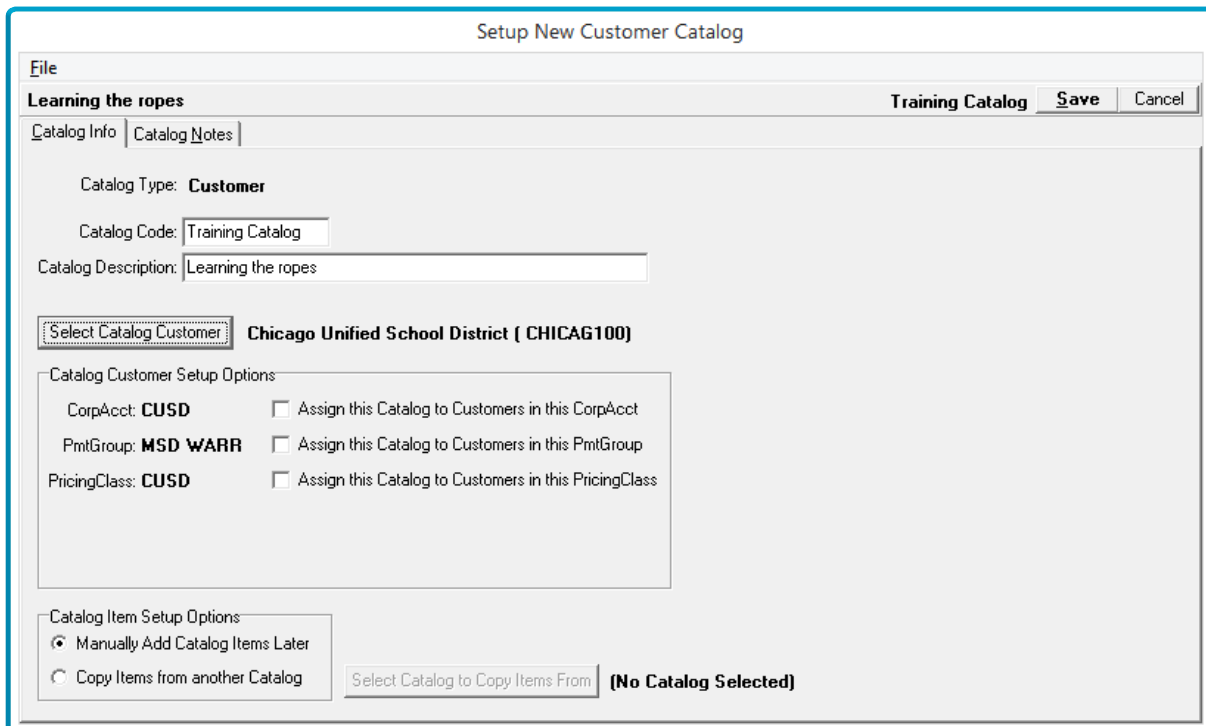

Name your catalog with the Catalog Code an then describe it in the Catalog Description field. Once that is done you will be able to click the Select Catalog Customer button. If you try before this you get blocked.
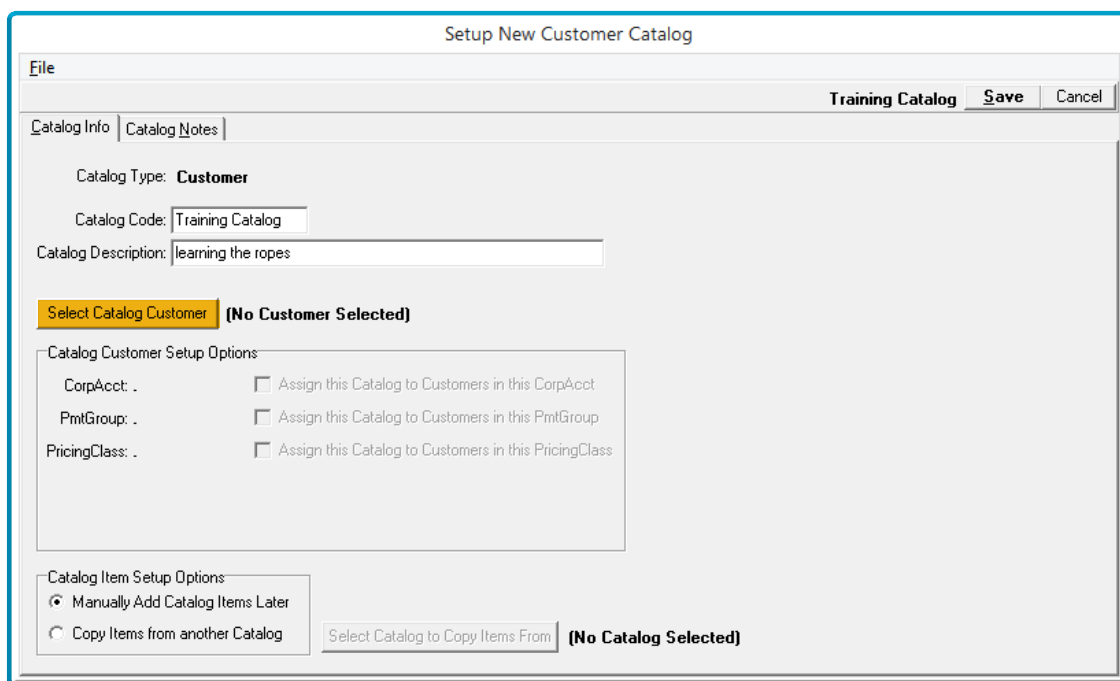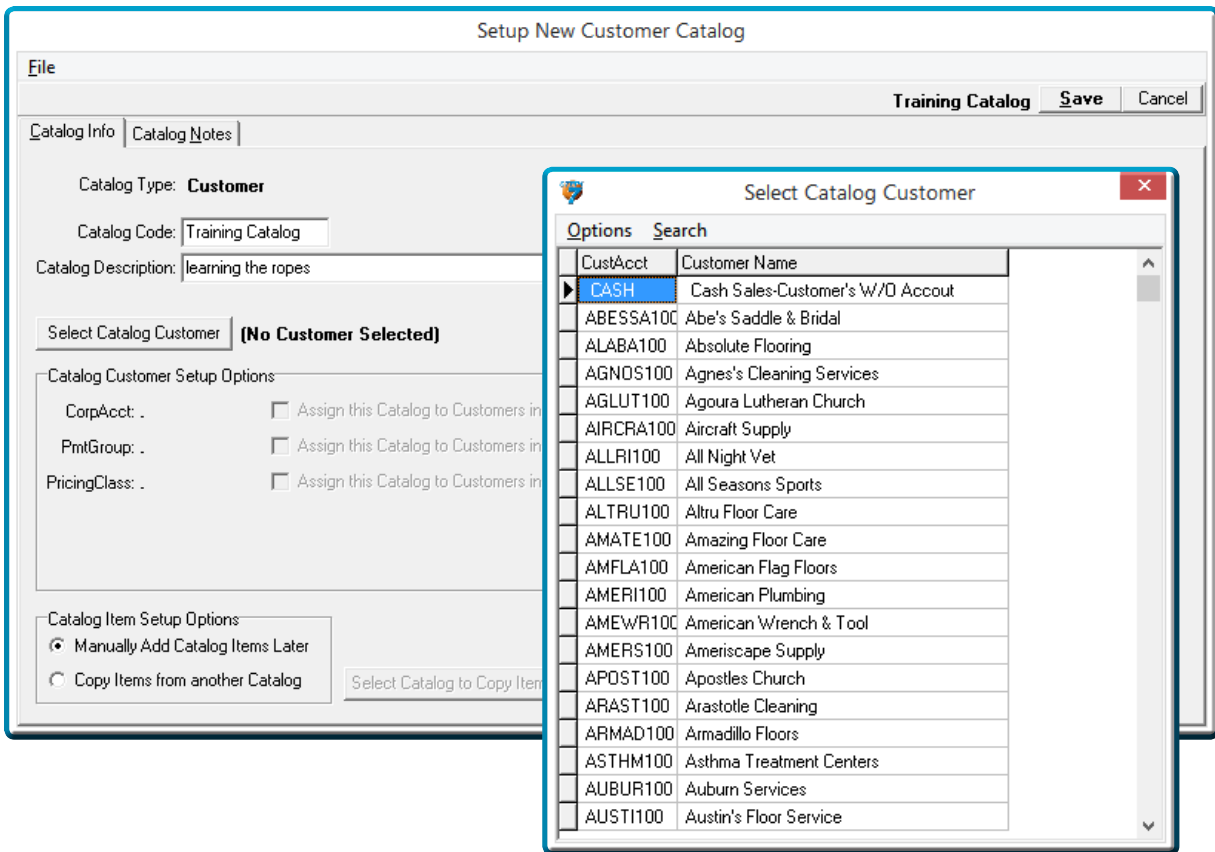
To add a customer from this list just double click on the one you want. If the customer you select happens to be assigned to a catalog already you will get a confirmation window asking if you wish to reassign. Only allowed one catalog per customer.

Setting up the catalog customer options includes the option to assign all customers within each of CorpAcct, PmtGroup and / or PricingClass. Each selection will only be available if the customer you've chosen is already a part of one or more of these groups. By checking a box here you are assigning all customers in that particular group to this same catalog of items. This is very useful when you have multiple customer accounts setup for the same large customer (A school district for example) and you want all to have the same virtual catalog available to them as well as your staff.

On the bottom you have the option to either manually add items to this catalog or copy all items from an existing catalog. A reason you might want to copy a catalog is you have a second School district that would have it's own catalog item list but buys or should be buying the same products as another.

For now, leave it set to manual and click Save.

Congrats! You now have a virtual catalog. But now we need to add some items to it. on the right you will see 2 buttons for adding items. By item and by SubCat. Check the box on the left to tag the catalog we just created and Click Add SubCat to Tagged Catalog on the right.
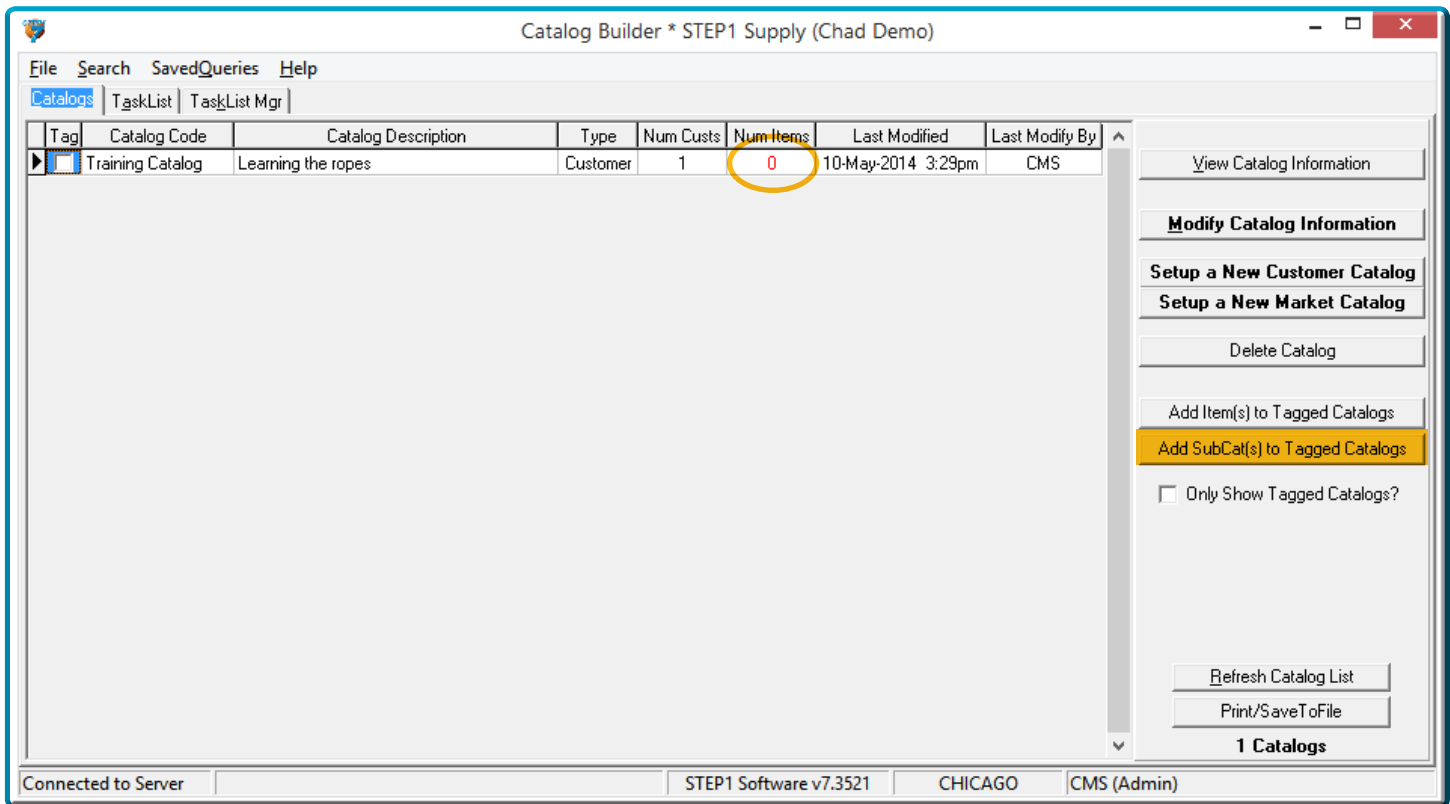

This is the complete list of your Sub Categories along with a tally of how many items is assigned to each. When you double click one of these SubCats all items within will be added to the curretn catalog.

Pick one and double click now.
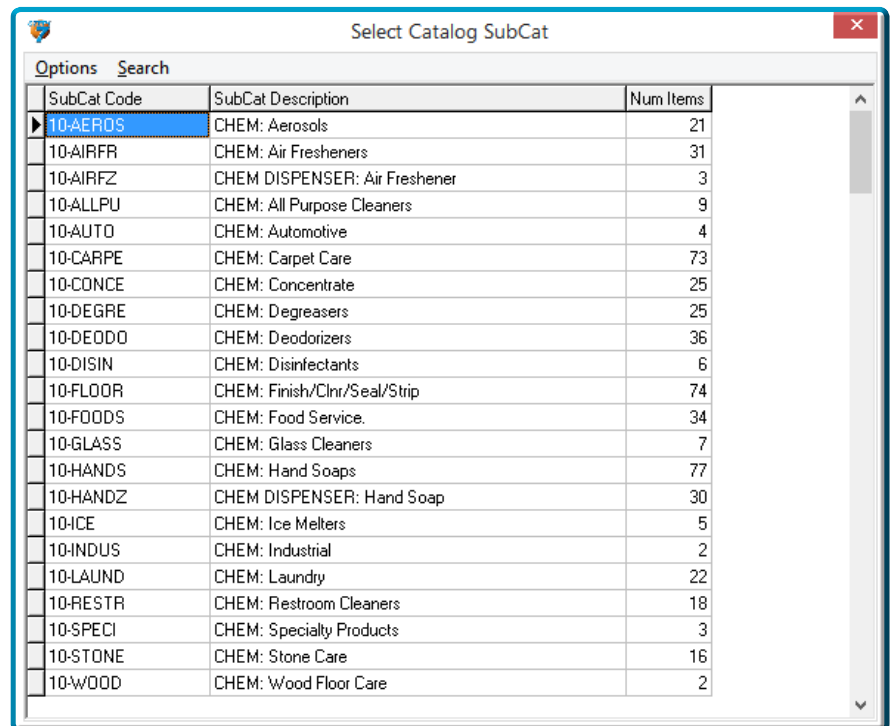
Easy as that we have multiple items added to our catalog. If you wanted to keep going and add more SubCats you would have just kept double clicking on them until you added all you want. Now let's go in and add individual items to our list. Make sure the catalog is tagged and click the Add Items to Tagged Catalog.
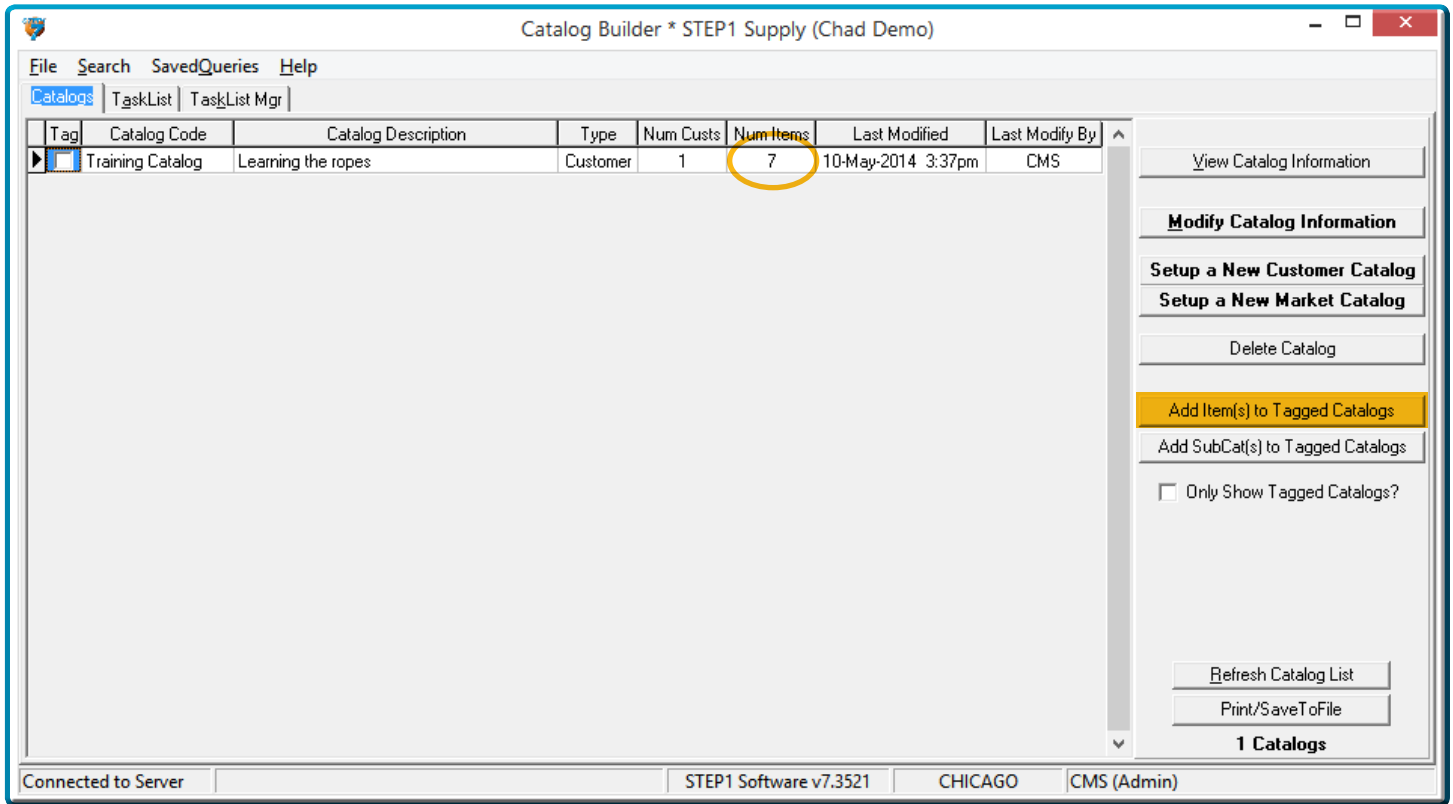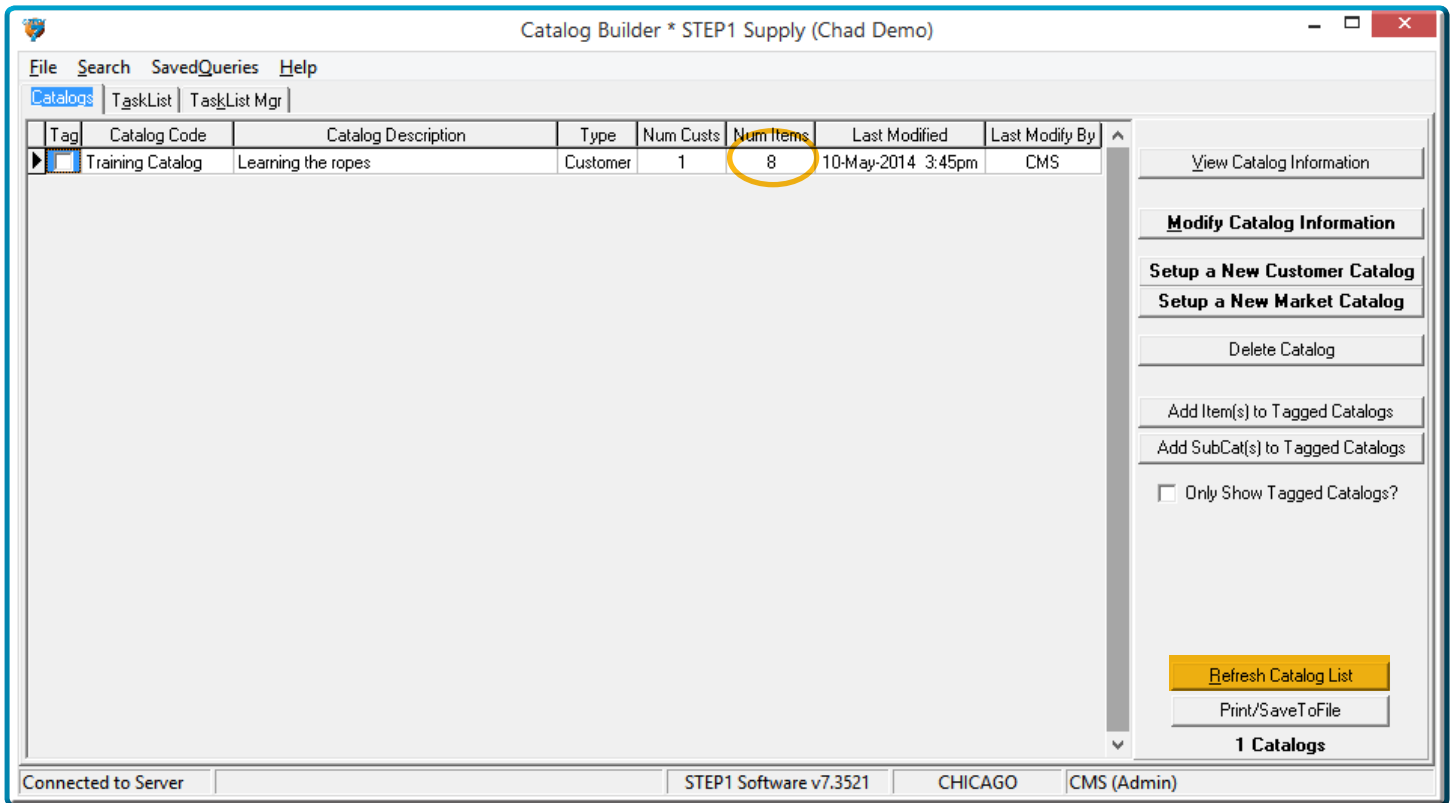

this is the entire item list. Use whatever method to find the item you want and double click on the item line. If you want to find others go ahead and do so before closing the window.
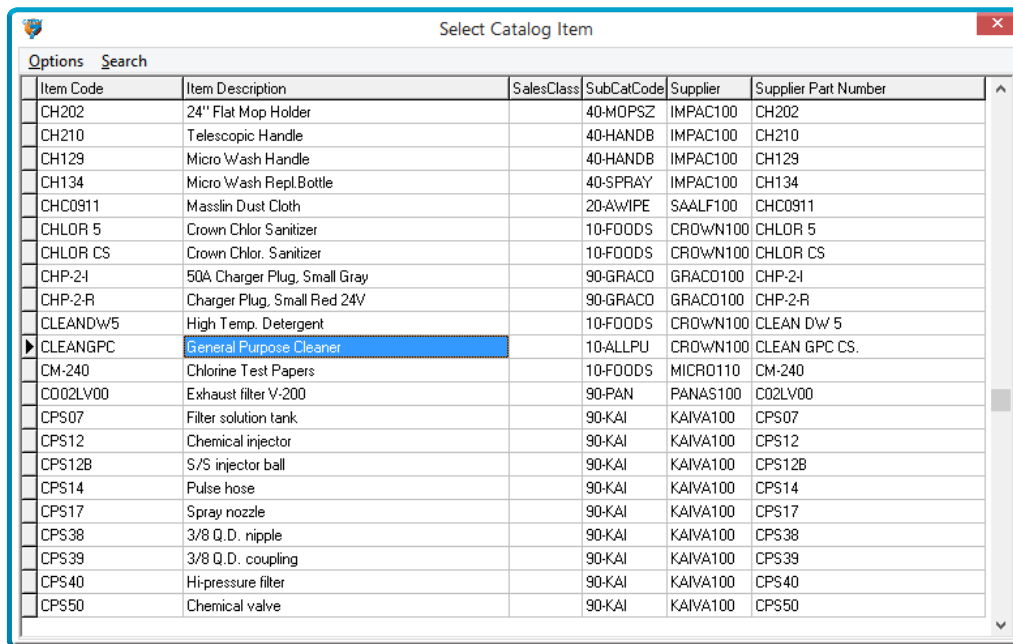
That's all there is to building a catalog for a Customer. If you are still seeing a zero under number of items or a number your not expecting click the Refresh Catalog List button on the bottom.

Now anything we just did can be changed in the Modify Catalog Information window. There are actually some additional options in there to refine this catalog so click it now, and select the Catalog items tab. In the buttom menu down the right side you will see that you have options to Add All Customer Products from All Catalog Customers. This would combine the customer items from all customers assigned to this catalog into one viewing location. You can also Add Catalog Customer Products Sold since a given date. This helps weed out old customer history items that they are no longer buying.
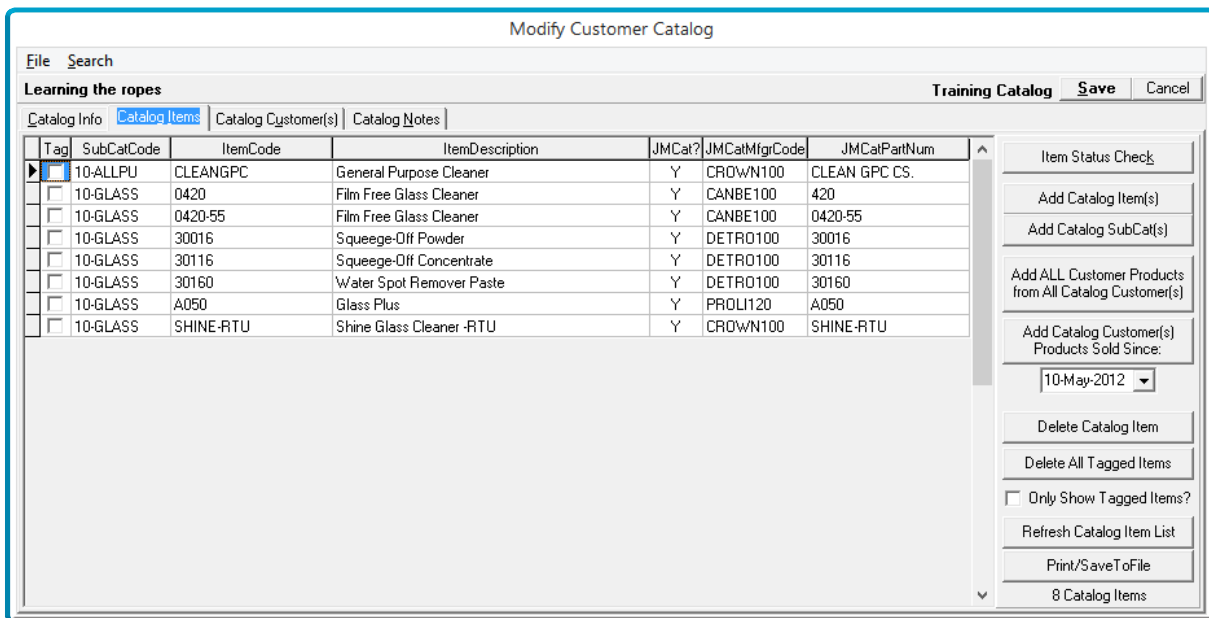
Now that you have a catalog setup you can see it in several different areas of your STEP1 system. OrderDesk & Web Sales Rep, and your customers will be able to see it in their CSS app.

V.7Training

Setting up a Market Specific Virtual Catalog

Instead of Customer Catalog click on Setup New Market Catalog. Name and describe it as you did before. Then click on Select Market Group.

Setup New Market Catalog

File

Training MCat   Save   Cancel

Catalog Info | Catalog Notes

Catalog Type: **Market**

Catalog Code: Training MCat

Catalog Description: My First Market Catalog

Select Market Group   **(No Market Group Selected)**

Catalog Customer Setup Options

MarketGroup: .   ☐ Assign this Catalog to Customers in this Market Group

Catalog Item Setup Options
- ◉ Manually Add Catalog Items Later
- ○ Copy Items from another Catalog   Select Catalog to Copy Items From   **(No Catalog Selected)**

The new window lists all of the Market Group Codes that are setup in your STEP1 system. Double click the one you want.

Select Catalog Sales Group

Options

MarketGroupCode	Market Group Description	Num Custs
AUTO	Automotive	27
BANKS	Leasing Companies/Banks	3
CHURCH	Churches	60
CONTRACT	Contract Cleaners	176
DRUGS	Drug Stores/Misc. Retail Stores	4
FOOD	Food Svc/ Resturants/Bars	51
GOVT	Government Facilities	32
HARDWARE	Hardware/Home Centers	5
HOSPITAL	Hospitals, Urgent Care Centers	30
HOTEL	Motels/Hotels	9
INDUST	Industrial Mfg/Supply	46
JANSAN	Dealers/ Re-Distributers	30
LAUNDRY	Laundry	2
MARKETS	Supermarkets & Grocery Stores	12

Now Check the box to Assign this Catalog to Customers in this Market Group. Once you do that your shown the option to only assign to customers that are not currently assigned to another catalog or to assign all customers in the Market group no matter what. Choose and click Save.

We now have a Virtual Market Catalog that needs items added to it. Do that in the exact same ways as you did in the Customer Catalog and your done.

V7 BASIC TRAINING PROGRAM

SYSTEM BASICS	GENERAL LEDGER
ORDER DESK	TABLE SETUP
WAREHOUSE SHIPPING	AR CUSTOMER SETUP
BILLING MANAGER	AP VENDOR SETUP
A/R MANAGER	INVENTORY SETUP
PURCHASING FOR BEGINNERS	REBATE MANAGER
WAREHOUSE RECEIVING	ORDER REVIEW
ACCOUNTS PAYABLE	CUSTOMER PRICE MANAGER
A/P CHECKS	SUPERVISOR'S CONSOLE

V7 ADVANCED TRAINING PROGRAM

ADVANCED CPM	REPORT MANAGER INTRO
ADVANCED PURCHASING	TASKLIST MANAGER
SALES MANAGER	KNOWLEDGEBASE
DISPENSER MANAGEMENT	LEAD TRACKING
QUERY MANAGER INTRO	

V7 OPTIONAL PRODUCT TRAINING PROGRAM

SERVICE DESK	CYCLE COUNT
WEB SALES REP	LAGASSE ITEM CONTROL
WEB CSS	DIMENSIONS BI & CRM
BANK REC	CATALOG BUILDER
REPORT BUILDER	POD SCAN
CORP ACCOUNT MANAGER	

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