# **v.7Training**

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

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



## 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 STEP1 Software Solutions · 3547 Old Conejo Rd. #104, Newbury Park, CA. 91320 800-553-2602 · Fax: 805-499-7783 · www.STEP1.com · email: sales@STEP1.com



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.





## 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.

<b>*</b>	Ca	talog Builder * STEP1 Supply (C	had Demo)		_ 🗆 🗙
<u>F</u> ile <u>Search</u> Saved <u>Q</u> u	eries <u>H</u> elp				
Catalogs T <u>a</u> skList Tas	sList Mgr				
Tag Catalog Code	Catalog Description	Type Num Custs Num Items	Last Modified Las	t Modify By	
					View Catalog Information
					dodify Catalog Information
				Se	tup a New Customer Catalog
				S	etup a New Market Catalog
					Delete Catalog
					Add Item(s) to Tagged Catalogs
				A	dd SubCat(s) to Tagged Catalogs
				Γ	Only Show Tagged Catalogs?
					Befresh Catalog List
					Print/SaveToFile
				~	0 Catalogs
Connected to Server		STEP1 Software v7	3521 CHICAGO	CMS (Admin	)

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.

	Setup New Customer Catalog	
<u>F</u> ile		
		Training Catalog Save Cancel
Catalog Info Catalog N	otes	
Catalog Type: 🖸	istomer	
Catalog Code: Tr	aining Catalog	
Catalog Description: lea	rming the ropes	
Select Catalog Custon	er (No Customer Selected)	
Catalog Customer Set	ιρ Options	
CorpAcct: .	Assign this Catalog to Customers in this CorpAcct	
PmtGroup: .	Assign this Catalog to Customers in this PmtGroup	
PricingClass: .	Assign this Catalog to Customers in this PricingClass	
Catalog Item Setup Op	itions	
Manually Add Cata	log Items Later	
C Copy Items from an	nother Catalog Select Catalog to Copy Items From (No Catalog Selected	4)

		Setup	New	Customer	Catalog	
ile						
					Training Cat	alog <u>S</u> ave Ca
atalog Info Catalog <u>N</u>	otes					
			_			
Catalog Type: <b>Cı</b>	ustomer		1	<b>&gt;</b>	Select Catalog Customer	×
Catalog Code: Tr	aining Catalog		(	Options <u>S</u> e	arch	
Catalog Description: lea	arning the ropes		Г	CustAcct	Customer Name	^
			Þ	CASH	Cash Sales-Customer's W/O Accout	
Calcul Catalan Cartan				ABESSA100	Abe's Saddle & Bridal	
Select Latalog Luston	ier (No Custor	ner Selectedj		ALABA100	Absolute Flooring	
Catalog Customer Setu	up Options			AGNOS100	Agnes's Cleaning Services	
CorpAcet		an this Catalog to Customers i		AGLUT100	Agoura Lutheran Church	
				AIRCRA100	Aircraft Supply	
PmtGroup: .	Assi	gn this Catalog to Customers ii		ALLRI100	All Night Vet	
PricingClass: .	🗖 Assi	gn this Catalog to Customers i		ALLSE100	All Seasons Sports	
				ALTRU100	Altru Floor Care	
				AMATE100	Amazing Floor Care	
				AMFLA100	American Flag Floors	
			1C	AMERI100	American Plumbing	
Catalog Item Setup Op	otions	]		AMEWR100	American Wrench & Tool	
<ul> <li>Manually Add Cata</li> </ul>	alog Items Later			AMERS100	Ameriscape Supply	
C Copy Items from an	nother Catalog	Select Catalog to Copy Ite		APOST100	Apostles Church	
			10	ARAST100	Arastotle Cleaning	
				ARMAD100	Armadillo Floors	
				ASTHM100	Asthma Treatment Centers	
				AUBUR100	Auburn Services	
				AUSTI100	Austin's Floor Service	

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.

Setup New Customer Catalog			
<u>F</u> ile			
Learning the ropes	Training Catalog	<u>S</u> ave	Cancel
Catalog Info Catalog Notes			
Catalog Type: Customer			
Catalog Code: Training Catalog			
Catalog Description: Learning the ropes			
[Select Catalog Customer] Chicago Unified School District ( CHICAG100)			
Catalog Customer Setup Options			
CorpAcct: CUSD 🔲 Assign this Catalog to Customers in this CorpAcct			
PmtGroup: MSD WARR 🛛 🗖 Assign this Catalog to Customers in this PmtGroup			
PricingClass: CUSD Assign this Catalog to Customers in this PricingClass			
Catalog Item Setup Options			
Manually Add Catalog Items Later			
C Copy Items from another Catalog Select Catalog to Copy Items From (No Catalog Selected)			

Setup New Customer C	atalog
<u>F</u> ile	
Learning the ropes	Training Catalog Save Cancel
Catalog Info Catalog Notes	
Catalog Type: Customer	
Catalog Code: Training Catalog	
Catalog Description: Learning the ropes	
Select Catalog Customer Chicago Unified School District (CHICAG100)	
Catalog Customer Setup Options	
CorpAcet: CUSD CorpAcet: CUSD	
PmtGroup: MSD WARR 🛛 🗖 Assign this Catalog to Customers in this PmtGroup	
PricingClass: CUSD	
Catalog Item Setup Options	
Manually Add Latalog Items Later	
C Lopy items from another Latalog Select Catalog to Copy Items From (No Catal	log Selected)

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.

Setup New Customer Catalog
<u>F</u> ile
Learning the ropes Training Catalog Save Cancel
Catalog Info Catalog Notes
Catalog Type: Customer
Catalog Code: Training Catalog
Catalog Description: Learning the ropes
Select Catalog Customer Chicago Unified School District (CHICAG100)
Catalog Customer Setup Options
CorpAcet: CUSD Assign this Catalog to Customers in this CorpAcet
PmtGroup: MSD WARR Assign this Catalog to Customers in this PmtGroup
PricingClass: CUSD Casing this Catalog to Customers in this PricingClass
Catalog Item Setup Options
Manually Add Catalog Items Later
C Copy Items from another Catalog Select Catalog to Copy Items From (No Catalog Selected)

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.

<b>W</b>		Catalog Builder * STEP1 Supply (Chad Demo)	- 🗆 ×
<u>File</u> <u>Search</u> Saved <u>O</u> u	eries <u>H</u> elp		
Catalogs TaskList Task	List Mgr		
Tag Catalog Code	Catalog Description	Type Num Custs Num Hennes Last Modified Last Modify By A	
▶ _ Training Catalog	Learning the ropes	Customer 1 0 10-May-2014 3:29pm CMS	View Catalog Information
			Modify Catalog Information
			Setup a New Customer Catalog
			Setup a New Market Catalog
			Delete Catalog
			Add Item(s) to Tagged Catalogs
			Add SubCat(s) to Tagged Catalogs
			Conly Show Tagged Catalogs?
			Befresh Catalog List
			Print/SaveToFile
		· · · · · · · · · · · · · · · · · · ·	1 Catalogs
Connected to Server		STEP1 Software v7.3521 CHICAGO CMS (A	Admin)

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.

💗 Select Catalog SubCat					
Options Search					
SubCat Code	SubCat Description	Num Items	^		
10-AEROS	CHEM: Aerosols	21			
10-AIRFR	CHEM: Air Fresheners	31			
10-AIRFZ	CHEM DISPENSER: Air Freshener	3			
10-ALLPU	CHEM: All Purpose Cleaners	9			
10-AUTO	CHEM: Automotive	4			
10-CARPE	CHEM: Carpet Care	73			
10-CONCE	CHEM: Concentrate	25			
10-DEGRE	CHEM: Degreasers	25			
10-DEODO	CHEM: Deodorizers	36			
10-DISIN	CHEM: Disinfectants	6			
10-FLOOR	CHEM: Finish/Clnr/Seal/Strip	74			
10-FOODS	CHEM: Food Service.	34			
10-GLASS	CHEM: Glass Cleaners	7			
10-HANDS	CHEM: Hand Soaps	77			
10-HANDZ	CHEM DISPENSER: Hand Soap	30			
10-ICE	CHEM: Ice Melters	5			
10-INDUS	CHEM: Industrial	2			
10-LAUND	CHEM: Laundry	22			
10-RESTR	CHEM: Restroom Cleaners	18			
10-SPECI	CHEM: Specialty Products	3			
10-STONE	CHEM: Stone Care	16			
10-W00D	CHEM: Wood Floor Care	2			
<b>—</b>			~		

#### CATALOG BUILDER

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.

		Catalog Builder * STEP1 Su	oply (Chad De	mo)		- □ ×
File Search SavedQu	ieries <u>H</u> elp					
Catalogs TaskList Tas	<list mgr<="" td=""><td></td><td></td><td></td><td></td><td></td></list>					
Tag Catalog Code	Catalog Description	Type Num Custs Num	Items Last M	lodified Last Mod	lify By 🔺	
▶ _ Training Catalog	Learning the ropes	Customer 1	7 10-May-20	14 3:37pm CMS	<u> </u>	⊻iew Catalog Information
						Modify Catalog Information
					S	etup a New Customer Catalog
					_	Setup a New Market Catalog
					18	Delete Catalog
						Add Item(s) to Tagged Catalogs
						Add SubCat(s) to Tagged Catalogs
						Only Show Tagged Catalogs?
						<u>R</u> efresh Catalog List
						Print/SaveToFile
					¥	1 Catalogs
Connected to Server		STEP1 Soft	ware v7.3521	CHICAGO	CMS (Adm	in)

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.

ſ	😻 Select Catalog Item 🗙								
	Options Search								
Γ	Item Code	Supplier Part Number	^						
	CH202	24'' Flat Mop Holder		40-MOPSZ	IMPAC100	CH202			
	CH210	Telescopic Handle		40-HANDB	IMPAC100	CH210			
	CH129	Micro Wash Handle		40-HANDB	IMPAC100	CH129			
	CH134	Micro Wash Repl.Bottle		40-SPRAY	IMPAC100	CH134			
	CHC0911	Masslin Dust Cloth		20-AWIPE	SAALF100	CHC0911			
	CHLOR 5	Crown Chlor Sanitizer		10-FOODS	CROWN100	CHLOR 5			
	CHLOR CS	Crown Chlor. Sanitizer		10-FOODS	CROWN100	CHLOR CS			
	CHP-2-I	50A Charger Plug, Small Gray		90-GRACO	GRAC0100	CHP-24			
	CHP-2-R	Charger Plug, Small Red 24V		90-GRACO	GRAC0100	CHP-2-R			
	CLEANDW5	High Temp. Detergent		10-FOODS	CROWN100	CLEAN DW 5			
	CLEANGPC	General Purpose Cleaner		10-ALLPU	CROWN100	CLEAN GPC CS.			
	CM-240	Chlorine Test Papers		10-FOODS	MICR0110	CM-240			
	C002LV00	Exhaust filter V-200		90-PAN	PANAS100	C02LV00			
	CPS07	Filter solution tank		90-KAI	KAIVA100	CPS07			
	CPS12	Chemical injector		90-KAI	KAIVA100	CPS12			
	CPS12B	S/S injector ball		90-KAI	KAIVA100	CPS12B			
	CPS14	Pulse hose		90-KAI	KAIVA100	CPS14			
	CPS17	Spray nozzle		90-KAI	KAIVA100	CPS17			
	CPS38	3/8 Q.D. nipple		90-KAI	KAIVA100	CPS38			
	CPS39	3/8 Q.D. coupling		90-KAI	KAIVA100	CPS39			
	CPS40	Hi-pressure filter		90-KAI	KAIVA100	CPS40			
	CPS50	Chemical valve		90-KAI	KAIVA100	CPS50			

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.

ÿ		Ca	talog Buil	der * STEP	Supply (	Chad Demo)			_ 🗆 🗙
<u>F</u> ile	Search SavedQu	ueries <u>H</u> elp							
Catal	🚾 T <u>a</u> skList Tas	kList Mgr							
Ta	g Catalog Code	Catalog Description	Туре	Num Custs	Num Items	Last Modified	Last Mod	lify By 🔺	
	Training Catalog	Learning the ropes	Customer	1	8	10-May-2014 3:45	pm CMS	6	View Catalog Information
								- 1	
								- 1	<u>Modify Catalog Information</u>
								- 1	Setup a New Customer Catalog
								- 1	Setup a New Market Catalog
								- 1	Delete Catalog
								- 1	
								- 1	Add Item(s) to Tagged Catalogs
								- 1	Add SubCat(s) to Tagged Catalogs
								- 1	Only Show Tagged Catalogs?
								- 1	
								- 1	
								- 1	
								- 1	
									Refresh Catalog List
								- 1	Print/SaveToFile
								¥	1 Catalogs
Conne	ected to Server			STEP1	Software v	/7.3521 Cł	IICAGO	CMS (Ad	dmin)

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.

$\square$	Modify Customer Catalog									
E	File Search									
L	Learning the ropes Training Catalog Save Cancel									
C	Catalog Info Catalog Items Catalog Customer(s) Catalog Notes									
	Tag	SubCatCode	ItemCode	ItemDescription	JMCat?	JMCatMfgrCode	JMCatPartNum	^	Item Status Check	
D		10-ALLPU	CLEANGPC	General Purpose Cleaner	Y	CROWN100	CLEAN GPC CS.			
		10-GLASS	0420	Film Free Glass Cleaner	Y	CANBE100	420		Add Catalog Item(s)	
		10-GLASS	0420-55	Film Free Glass Cleaner	Y	CANBE100	0420-55		Add Catalan Cat Cat(a)	
		10-GLASS	30016	Squeege-Off Powder	Y	DETRO100	30016			
	$\Box$	10-GLASS	30116	Squeege-Off Concentrate	Y	DETRO100	30116		Add ALL COMMUN Products	
		10-GLASS	30160	Water Spot Remover Paste	Y	DETRO100	30160		from All Catalog Customer(s)	
		10-GLASS	A050	Glass Plus	Y	PROLI120	A050			
L		10-GLASS	SHINE-RTU	Shine Glass Cleaner -RTU	Y	CROWN100	SHINE-RTU		Add Catalog Customer(s)	
									Products Sold Since:	
									10-May-2012 -	
									Delete Catalog Item	
									Delete All Tagged Items	
									Only Show Tagged Items?	
									Refresh Catalog Item List	
									Print/SaveToFile	
								~	8 Catalog Items	

#### CATALOG BUILDER

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.

<b>*</b>		Ord	ler Desk * STEP	1 Sup	oply (C	had Demo)				_ 🗆 🗙
<u>F</u> ile <u>E</u> dit <u>S</u> earch <u>V</u> iew <u>R</u> eports <u>H</u> e	lp									
Chicago Unified School District				V	iew Cu	rrent Order M	odify Customer In	fo   Customer Sta	tus Customer <sup>v</sup>	WebSite E <u>x</u> it
Main Customer Notes Credit Pending Or	rders   Open In <u>v</u> oice	s Le	edger History 🛛 Invoi	ce <u>H</u> is	story R	ebate Contracts	CPM Contract P	rices CPM Polic	ies	
Bill To: Chicago Unified School D Bill Address 1: 75 N Pratt Road	Account#: CHICAG100 Salesman: WALLY				Order Ship To: Creston Middle school					
Bill Address 2:		F	Price Opt: <b>d10</b>			Ship Address 1:	10925 East Pro	spect Street		
City,State∠ip: <b>Chicago</b> Contact: <b>Chris Cantros</b>	IL 63219					Ship Address 2:				
Telephone: 532-345-8100		R	oute/Day Carrier			City,State,Zip:	Indianapolis	IN		
FAX: 532-545-8139			Califor			Ship Attention:				
Resale #:						Sales Tax?	N (	Corp Acet: CUSE	)	
Comments:		Sa C	les Class: A alc Class: A			Tax Freight? Charge Freight?	N D	Corp Dept: mt Group: MSD	WARR	
		Mark	et Group: SCHOOL	-		AgeStatus:	HId C	PM Class: CUSE	)	
Current Order Summary: 0 Lines	\$0.00 Total				A	dd Item to Ord	er	Item Status	QtySold Histo	ry Price History
Customer Products Due for ReOrder Catalo	<u>altems</u> Inventory It	ems	Sale Items							
Customer Catalog: Training Catalog -	Learning the rope	es						Cust	omer Products	Due for Reorder
SubCategory Description (DoubleClick to Sel	ect) Code 🗸	Ч	ItemCode	Тур	Cls	ItemDescr	iption	ItemExten	dedDescription	Currer 🔺
All Catalog Items (8)	10 ALL PU		)420 )420.55	1	Film	Free Glass Clean	er			
CHEM: All Pulpose cleaners (1)	10-GLASS		A050	I.	Gla	is Plus				
			SHINE-RTU	1	Shir	ne Glass Cleaner -	RTU			
			30116		Squ	eege-Off Concen eege-Off Powder	trate			
			30160	, T	Wa	ter Spot Remover	Paste			
STEP1 Supply Company (v7Demo)	Sameh	itam .	\$175 (5)		Wally Widg	let C				
Chicago Unified School District	Seurch		Cart		Accoun	t ↓ °				
Customer Products	fied school district	A	il Calegones	<u> </u>	Ali Su	b-Calegon				· · · ·
Coni 6 12 GREEN PRC	DUCTS					EP1	Software v7.352	26 CMS		
mos Due CHEM: Aeros	ols	Custom	er Price Last Sale (	order Qt	ŧy					
Vendor Managed	AR-A00242MA	\$5 :	76 can -		can					
Curtemer Catalog	eodorizer - 10 oz., ango	0.			can					
Mi	sty® The Naturals Dry		STEP1 Supply Company Chicago Unified Sc	(v7Demo hool D	) istrict		Search ite	rm #/desc 🛛 😡	[empty] Ha Cart ► A	arrison Bronce ccount <del>-</del>
Inventory Sale	<mark>4R-A00810</mark> ust Mop Treatment <sup>n</sup>	\$4.2	Customer Produc	ts	Chica	igo unified school	district All Ca	tegories 🔻	- All Sub-Catego	ries 🔻
Special Prev CHEM: Carpe Item	t Care	Custom	er		GRE	EN PRODUCTS				
Reference Items	146 	<sup>\$</sup> 16.2	Due To Buy		CHE	: Aerosols	Pri	ce Last Sale C	rder Qty	
Ga CHEM: Stone	llon Care	Custom	CMI Items			AMR-A00242MA Deodorizer - 10 Misty® The Natura	0 oz., Mango <sup>\$</sup> 5.7 ils Dry	6 can -	can	
Of Customer Catalog	410 uarry Tile	Add	Catalog Items		21	AMR-A00810 Dust Mop Treat	tment \$4.2	8 can -	can	
Web Sales Rep			Inventory Items		CHEN	: Carpet Care	Pri	ce Last Sale C	rder Qty	
			Items On Sale			06146 Roto-Pro	\$16.2	0 gal	gal.	
					CHE	Gallon	Pri	ce Last Sale C	rder Qty	
						0410	Sor	9 gal	mal	
						Quarry Tile Rer	iovatr GL	- 04.1	Bar.	
							Add To Car	t		
			Customer Self Service						displaying	▼ ↓ 4 of 4 items





## 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		
<u>F</u> ile		
	Training MCat Save C	ancel
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		
<ul> <li>Manually Add Catalog Items Later</li> </ul>		
C 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	MarketGroupCode Market Group Description						
▶ 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	~				
<	•	>					

#### CATALOG BUILDER

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.

Setup New Market Catalog			
Eile			
My First Market Catalog	Training MCat	<u>S</u> ave Ca	ncel
Catalog Info Catalog Notes			
Catalog Type: Market			
Catalog Code: Training MCat			
Catalog Description: My First Market Catalog			
Select Market Group School/Education Institutions (SCHUUL)			
Catalog Customer Setup Options			
MarketGroup: SCHOOL / Assign this Catalog to Customers in this Market Group			
Only Assign to Customers Not Already Assigned to a Catalog			
O Assign this Catalog to ALL Customers in this Market Group			
Catalog Item Setup Options			
Manually Add Catalog Items Later			
C Copy Items from another Catalog Select Catalog to Copy Items From (No Catalog Selected)			

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.

💗 Catalog Builder * STEP1 Supply (Chad Demo) – 🗆 🗙									
<u>File</u> <u>Search</u> Saved <u>Q</u> u	eries <u>H</u> elp								
Catalogs T <u>a</u> skList Tas <u>k</u>	List Mgr								
Tag Catalog Code	Catalog Description	Туре	Num Custs	Num Items	Last Mo	odified	Last Modify By	^	
Training Catalog	Learning the ropes	Customer	1	8	10-May-201	4 3:45pm	CMS		⊻iew Catalog Information
Training MCat	My First Market Catalog	Market	72	0	10-May-201	4 4:38pm	CMS		
									Modify Catalog Information
									Setup a New Customer Catalog
									Setup a New Market Catalog
									Delete Catalog
									Add Item(s) to Tagged Catalogs
									Add SubCat(s) to Tagged Catalogs
									Only Show Tagged Catalogs?
									<u>R</u> efresh Catalog List
									Print/SaveToFile
								¥	2 Catalogs
Connected to Server			STEP	1 Software \	7.3521	CHIC	AGO CM	S (Ad	min)

## V7 BASIC TRAINING PROGRAM

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

V7 ADVANCED TRAINING PROGRAM

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

## V7 OPTIONAL PRODUCT TRAINING PROGRAM

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

