v.7Training



STEP1 CRM FOR SALES REPS

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MOST MODULE TRAINING SESSIONS TAKE ABOUT AN HOUR

TO GET STARTED

LOGIN TO YOUR STEP1 CRM



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Customer Score Card - Category Score Card - Dispenser/Refills

When first logging into CRM you will land on your Customers list, as you can see Customers is highlighted on the bar at the bottom. Here you will find all of your customers on the left. To locate a certain customer, one can scroll down the list or you can search for the customer in the search field. Once you find your customer you will then be able to look at this Customer's Score Card.

Here you will find comparisons for Sales, GP, Ave.GP/Order, and GP% all with CY/PY comparisons for Year to Date, Last Three Months and Last Month.

Colors of the arrows indicate:

- Green indicates an increase over the same time period (.01% or more)
- Yellow is for values lower than the same period last year but within 10% (.00% to -10%)
- Red is for a decrease over 10% (-10% or more)

Vallace Semper -	Bronse	on Heal	th Care (E	BRONSO	100) C			Adminis
Search Customers	Market Group:	Nursin	g Homes/	Rehab Fa	acilities		c	lass: A
Bronson Health Care 547 Old Conejo Rosd #104 lewbury Park, CA	Customer Sco	re Card						
Buffalo Bar & Grill		Year To	Date	Last 3	Months	Last M	lonth	
15 N. 480 W.	Sales	10,791	8,677	10,791	8,677	3,602	3,194	Ē
fayne, IN	GP	4,208	3,544 👚	4,208	3,544	836	1,546	Ē -
Busy Bee Cleaning Service	Avg GP/Order	248	148 👚	248	148	139	172	F
2524 Woodville Street mbrass, IN	GP %	39.0	40.8 💛	39.0%	32.8%	23.2%	48.4%	-
Calvery Lutheran Church 111 Shelby Street okerabery, KY	Category Score	Card						
Chatsworth Floors	Category		<u>%</u> <u>Cu</u>	of Sales <u>%</u> istomer	of Sales Group	LastSaleDate	12mth Sales	12mth Profit
orothy, IN	CHEMICALS		43.6	5 38	.08	4/25/2016	0	0
hicago Unified School District	PAPER		17.7	7 34	.83	4/20/2016	1	1
N Pratt Road	FOOD SERVICE		17.4	4 2.9	97	4/25/2016	1	1
Neleter Cumplu	MISC		10.8	3 3.3	35	1/22/2016	1	1
West Film Street ST 502	MAINTENANCE P	RODUCT	<u>s</u> 4.7	7.	54	4/25/2016	+	ŧ
	ICE MELT		4.7	4.1	10	310010010		I

Below the Customer Score Card, you will see this customer's Category Score Card. Here you will see how this customer is performing in each category, category score card gives you both alerts and opportunities. Last Sale Date will alert you that you may have lost business in an Item Category. The colors of the last sale date: Green indicates last sale date within 3 months, Black 3 months or longer, and Red is 6 months or longer.

An opportunity might present itself in the form of % of Sales. % of Sales Group relates to the product mix that this type of customer buys from your company.

% of Sales Customer relates to the product mix for this customer. In this case: Paper accounts for 34.83% of purchases for the average customer in the Market Group. 17.7% of this customers purchases are Paper items. This would represent an opportuntity. Click on the underlined category to bring up the Top 10 items like customers are purchasing, if there is no last sale date, this would indicate an item/s to present to this customer to increase sales.

547 Old Conejo Road #104		Customer Score Card					
rwbury Park, CA	Top 10 I	tems		×	Land M	a metho	
suffalo Bar & Grill					CY	PY	
05 N. 480 W.	ItemCode	CustomerName	LastSaleDate				F.
	PBM10212	2 Ply Jumbo Jr. Tissue	3/21/2015				
3000, 101	PBM5241	2 Ply Toilet Tissue	3/11/2015		0	1,946	2
usy Boo Closning Service	PBMMFB	Multifold Towel, White	3/11/2015				-
usy bee cleaning service	PBMFAC	2 Ply Facial Tissue	3/20/2015		0	389 -	2
524 Woodville Street	PBMCFB	C Fold Towel,White					E.
abrass IN	PBM852	Household Roll Towel				31.296	7
in man first	REL444268	2 Ply Toilet Tissue					
alvery Lutheran Church	SLOB-200	2oz Plastic Southe Cup					
arrory Eathoran onaron	FABP-K5	502 Translucent Cup					
11 Shelby Street	FABEK3.5	3.5 oz Translucent Cup					
kersbery, KY							
natsworth Floors							
IA9 Hague Road					astSaleDate		12mth
						Sales	Profit
romy, IN						+	♦
hicago Unified School Distri						+	÷
N Pratt Road						1	1
							V

Below the Category Score Card you will see Dispenser/Refill Information, if this customer has purchased a Dipsenser or Refill from your company they will show up here.

Another alert shows last sale date for proprietary dispensers and more important refills. The color code is the same as Item Categories: Green = < 3 months, Black = > 3 months < 6 months, Red > 6 months.

Dispenser	/ Refill				
ItemCode	Description	SubCat	d/r	Qty	LastSalesDate
5116	SeaBreeze Dispenser	CHEM DISPENSER: Air Freshener	D	8.0000	10/7/2015
9346	ClearVu 46oz Soap Dispenser	CHEM DISPENSER: Hand Soap	D	5.0000	11/23/2015
YH100-12	1000 Plus Dispenser,White	CHEM DISPENSER: Hand Soap	D	5.0000	10/20/2015
5134	Cinnamon spice gel air fresh	CHEM: Air Fresheners	R	12.0000	4/20/2016

The next button on the bottom bar is the Prospect button, skip over this button for now, we will come back to this later in the guide.

Contacts - Adding New Contact

Now click on the Contact button. Here you will find all the contacts associated with this customer.

Click on the plus button to add a new contact or click on a contact to look up their information or to edit this contact.

Wallace Semper -	Bronson	Health Care (BRONSO10	00) C	Administration	Wallace Semper	*	Bronson He	ealth Care (BRONSO100) C	Administration
Search Contacts	+				Search Contacts	T	Adding New C	Contact		
David M.					David M.		-			
Sales	First Name:	David			Sales		First Name:			
Frank M.	Last Name:	М.			Frank M.		Last Name:			
CSR	Job Title:	Sales			CSR		Job Title:			
Ralph A.	Business Phone:	708-662-3981	Ext:		Ralph A.		Business Phone:		Ext:	
Accounts Payable	Business Phone 2	:	Ext:		Accounts Payable		Business Phone 2:		Ext:	
Sheldon S.	Fax:	1-708-662-3987			Sheldon S.		Fax:			
VP Purchasing	Home Phone:				VP Purchasing		Home Phone:			
Ward B. 708-662-3981	Cell Phone:				Ward B. 708-662-3981		Cell Phone:			
	Email:	Davem@Step1software.	.com				Email:			
	Sales Contact:						Sales Contact:	✓		
		Save Contact						Save Contact		
Customers Prospec	ts Contacts Op	oportunity Activities	Notes Calendar		Customers	Prospec	ts Contacts Opp	ortunity Activities	Notes Calend	ar

After clicking on the plus button the screen on the right will come up, enter all the new contact's information that you have and click Save Contact, you can always come back to the contact to add additional info.

Opportunities - Adding New Opportunity

Click on the Opportunity Button. Here you will find all of the Opportunties that are current with this customer on the left, click on an opportunity to view or edit. If adding a new opportunity click on the plus button in the upper left and the screen to the right will open to set up the opportunity.

Wallace Semper 🔹	Bronson Hea	Ith Care (BRONSO100) C	Administration		Wallace Semper	-	Bronson Health Care (BRONSO100) C	Administration
Search Opportunities	+				Search Opportunities	T	Adding New Opportunity	
5/19/2015 12:00:00 AM	Opportunity:	Hard floor program			5/19/2015 12:00:00 AM			
0	Contact:	1508 -			0		Opportunity:	
	Opportunity Type:	New Items 💌					Contact:	
	Opportunity Source::	Product Demo -						
	Date Open:	5/19/2015 • Date Close: 5/21/201	5 🔻				Opportunity Type:	
		Save Opportunity					Opportunity Source:	
	MileStone: Prospects I	For: \$.00 Started: 3/7/2016		•			Date Open: 3/8/2016 Date Close: Date	*
	No Competitors			•			Save Opportunity	
	No Products			*				
Customers Prospe	cts Contacts Oppor	rtunity Activities Notes Calendar			Customers	s Prospec	ts Contacts Opportunity Activities Notes Calendar	

Name the Opportunity, (Remember, we are already positioned on the customer) Suppose you notice during your sales call that you are not getting any of the glove business. You could name the opportunity 'Gloves'. Or, you might notice that there is a department within the customer that you need to penetrate (ie, 'Grounds Maintenance'). Or you might be aware of an upcoming project (summer gym floor finishing) If entering an opportunity for a Prospect, it works exactly the same way.

Choose the Contact, Opportunity Type (determined by your CRM Admin), Opportunity Source (determined by your CRM Admin), choose Date Open, choose Date Close when the opportunity is closed. Click Save Opportunity.

Now one can add the following to the Opportunity: Milestone, Competitors, and Products by clicking on the plus sign next to each one.

Adding a Milestone - Milestones are used to track the progress of the opportunity through the sales cycle, this is also one way to forecast what might be coming down the pipeline.

	Prospects	Save Opp	ortunity	
Header	Qualified			×
	Closed			
Current Milestone:	Holding	Act Completion Date:	3/8/2016	*
New Milestone:	Qualified	▼ Start Date:	3/8/2016	Ŧ
		Value:	\$0	
		Est Completion Date:	4/8/2016	*

Competitor	Grainger	
+	НР	
Header	National Sanitary	
	Staples	
Competitor:		-
(Save)	Cancel	

Adding a Competitor - Adding a competitor can determine who you are up against, one can also see if they are losing their opportunities to a competitor and a plan can be created to beat the competition.

Adding a Category - Helps the rep remember what to be focusing on for the opportunity, also helps to figure what is attributing to the increase in a certain item category when the opportunity is closed.

Header	×
Category:	CHEMICALS
Save	CHEMICALS
o	EQUIPMENT
+	LAGASSE ITEMS
Category	LINERS

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Note: Once you have moved the opportunity through all of the Milestones and you get an order, change the milestone to the last milestone and leave it there (don't enter the Actual Completion Date). This will provide gratification when looking at the Baseline Status Dashboard and seeing all the opportunitites you closed.

Activities - Adding Activities

Click on the Activities Button. Here you will find all of the Activities that have been recorded with the current customer you are under in CRM. If you are entering a new activity click on the plus sign in the upper left.

Wallace Semper	Br	ronson Health Care (BBONSO100)	C Administration	1	Wallace Semper 👻	В	Fronson Health Care	(BRONSO100) C		Administration
Search Activities			-		Search Activities	_ ▼ <u>Adding N</u>	<u>Vew Activity</u>			
Demo 1/20/2016 12:00:00 AM WallaceSemper	Activity Date:	1/20/2016 🔻			Demo 1/20/2016 12:00:00 AM WallaceSemper	Activity Date:	3/8/2016 -	•		
Demo 11/12/2015 12:00:00 AM WallaceSemper	Activity: Category:	Demo • CHEMICALS •	CHEM: All Purpose Cleaners 👻		Demo 11/12/2015 12:00:00 AM WallaceSemper	Category:		*		¥
Demo 6/1/2015 12:00:00 AM	Supplier:	v			Demo 6/1/2015 12:00:00 AM	Supplier: Campaign:		*		
WallaceSemper Training 5/19/2015 12:00:00 AM	Campaign: Opportunity:	Ţ			Training 5/19/2015 12:00:00 AM	Opportunity				
WallaceSemper	Contact:				WallaceSemper	Contact:		-		
	Follow Up:	Date - 12:00 AM	All Day Voutlook			Follow Up:	Date -	12:00 AM 👻	All Day 🔻	Outlook
	Memo:	hard floor finishes discussed				Memo:				
	(Submit Activity					Submit Activity			
Customers Pr	rospects Contact	ts Opportunity Activities	Notes Calendar		Customers P	rospects Contac	ts Opportunity	Activities No	otes Calendar	

When setting up an activity, choose the following from the drop downs that apply to the activity:

Activity Date, Activity (determined by your CRM Admin), Category, Sub-Cateory, Supplier, Campaign (if the activity is directed at a Campaign), Opportuntiy (if the activity applies to an opportuntity that is set up under this customer) Contact, and Follow Up date, if you are using Outlook as a calendar, click the Outlook button to add this appt. to your Outlook calendar. One can also add a memo for more detail on the activity.

Notes - Adding Notes

Notes are used to communicate between staff, this could be many things from reminding your sales rep to demo something to informing staff that a contact is no longer in charge of purchasing. This all ties into SNAP, STEP1 Notes And Photos.

Click on the plus sign to add a new customer note, pick the note date, Sub Topic, Subject, enter information that you want in the note, from here you need to decide who the note pertains to by choosing from the drops downs.

For more info refer to SNAP Training Guide

Date:	3/8/2016 -				
Sub Topic:	(Select SubTopic)		-		
iubject					
Note:					
Note:	Urgent List I	-irst Viev	v By: AllUsers	*	
Note:	Urgent List I Select User	First Viev	v By: AllUsers No Group	•	-

undee oer	npei		biona	on nearth care (Bhonso roo) c	
	Accour	nt Customer No	tes		
		Date Author	Topic Sub Topic	Note	
			+	Add New Customer Note	
	Þ	06 Oct 2015 Wallace Semper	Sales Follow Up	Be sure to follow up on new floor pads	Edit
	Þ	09 Jul 2015 Wallace Semper	Sales	Demo went well	Edit
			General	1 Comment(s) From [last: 7/9/2015 12:43:57 PM by Wallace Semper	

Calendar - (only if you are not using one already)

Click on the calendar and choose new appointment. Choose the information that pertains to the appointment that is being set up.

Wallace Sem	ber	-		Bronson Heal	th Care (BRO	NSO100) C	Administration
Prev Today	Next	March – April,	2016 Day	Work Week	Week Mont	Show Work Time	
Sunday March 06	Monday 7	Tuesday 8	Wednesday 9	10	11	12	
			New Appoint	ment y Event			
13	14	15	New Recurri	ng Appointm	ent	19	
20	21	22	New Recur Go to This	ring Event Day	25	26	
0						۲	
27	28	29	30	31	April 01	2	
	Custor	ners Pros	pects Conta	cts Oppor	tunity Activ	vities Notes	Calendar

Tip: Choosing Recurring Event allows you to organize your territory: this customer weekly, this one monthly, etc. Then, to plan your week, you can click and drag to time slots.

When looking at an event one can click on Goto Account Information to jump right to that customer's account information.

Prospects - Adding New Prospect

Click on the Prospects button to bring up your list of prospects. Click on the plus button in the upper left to add a new prospect.

Wallace Semper -	Family D	Diner (CASH) P	Administration
Search Prospects	· •		
Family Diner 312 N 8th St	Prospect Name: Family	v Diner	
Smithville, MN Perfect Solutions	Address 1: 312 N	I 8th St	
456 Eden Street Eden Prairie, MN	Address 2:		
address1	City/State/Zip: Smithv	ville MN 56542	
Tree House Paper	Class: C 🔻	Market Group: Food Svc/ Resture	
4899 Wood Street Forest Hills, MN	Office Phone: 324-25	54-6384	
	Office Fax: 324-25	54-6385	
	Website Address:		
	Branch: STEP1	1 V737Demo Supply Co. 👻	
	Save P	Prospect	
Customere Prospe	cte Contacte Opportur	unity Activities Notes Colendar	

Note: Everything that was covered for entering Contacts, Opportunities, Activities, Notes, and Calendar info for Customers; the process is the same for Prospects.

Opportunity Dashboard

The opportunity dashboard, this is your pipeline of new business. This shows how many customers are at each phase (Milestone) of the sales cycle, potential annual revenue and, how long the customers have been at each Milestone (by average).



To get to your dashboard, click on the Administration button in the upper right and choose Opportunity Status from the drop down.

		Administrat	ion
	Logout		
\checkmark	Opport	unity Statu	s
	Sales F	Rep Review	
	Lists		>
	About		

Opportunity List and Activity List

Increase sales in Chemicals & Liners

Increase sales in Chemicals & Liners

Increase sales in Chemicals & Liners

Paper

Paper

Liners

Bronson Health Care Hard floor program

Perfect Solutions

Sqeegee Blades

center pull towels

Export to PDF Export to XLS Export to XLSX Export to RTF Export to CSV

Opportunity List is where one will find all of their opportunities. Activity List is where one will find all of their activities.

0.00

306

306 0.00

303 0.00

300 0.00

299 500.00

295

303 2,000.00

303 2,000.00

303 1,000.00

300 1,000.00

0.00

To get to these lists, click on the Administration button in the upper right, choose Lists and choose either Activity List to view your activities or Opportunity List to view your opportunities.

5/8/2015

5/8/2015

5/11/2015

5/11/2015

5/11/2015

5/11/2015

5/14/2015

5/14/2015

5/15/2015

5/19/2015

Qualified

Closed

List

Closed

Suspects

Prospects

Opportunity List

WALLY

Customer Name Y Opportunity Y Assigned_To Y Date Open Y Mile Stone Name Y Days@Milestone Y Value Y



Once in the list, a person can sort by
clicking on the column header. One can
choose different criteria by clicking on the
column header to bring up a check box
and choosing the criteria you would like to
see or not see.

On the bottom of the list there are different file formats so one can export to analyze the data more closely.

Home			Activity List		
	Activity Date T	Assigned To ↓ ▼	Customer Name	Activity Description T	Category Description T
Þ	5/11/2015	WALLY	Aircraft Supply	Demo	CHEMICALS
Þ	5/18/2015	WALLY	Micheal's Carpet Care	Demo	CHEMICALS
۲	5/19/2015	WALLY	Bronson Health Care	Training	CHEMICALS
Þ	6/1/2015	WALLY	Bronson Health Care	Demo	CHEMICALS
Þ	10/21/2015	WALLY	Cash Sales-Customer's W/O Accout	Demo	CHEMICALS
Þ	10/21/2015	WALLY	Anderson Frozen Foods	Demo	CHEMICALS
×	11/12/2015	WALLY	Bronson Health Care	Demo	EQUIPMENT
Þ	11/25/2015	WALLY	Cash Sales-Customer's W/O Accout	Training	
۲	1/20/2016	WALLY	Bronson Health Care	Demo	CHEMICALS
Þ	2/19/2016	WALLY		Demo	CHEMICALS

 Page 1 of 2 (16 items)
 Provide
 1
 2
 Next

 Export to PDF
 Export to XLS
 Export to XLSX
 Export to RTF
 Export to CSV

Micheal's Carpet Care

Micheal's Carpet Care

Aircraft Supply

Aircraft Supply

Aircraft Supply

Micheal's Carpet Care

Aircraft Supply

Abe's Saddle & Bridal

Page 1 of 2 (19 items) Prev 1 2 1

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SalesRep Review - SalesRep Score Card - Catergory/Group/Class/Vendor Score Card - New Customer Score Card

The SalesRep Review is like the Customer Review except it is measuring the reps performance. In the SalesRep Score Card you will find comparisons for Sales, GP, AveGP/Order, and GP% all with CY/PY comparisons for Current Year, Last 3 Months, and Last Month. There is a row labeled Activities, this is where the activities you enter populate. You will also see their is an additional field, Current Month, this will give you current month figures. There is also a column for each metric labeled 'Goal', this would be set up by the SalesMngr.

Home			SalesRep Review			Administration
	Wallace Semper	•			Important Info	ormation
	SalesRep So	core Card			Basis: Co	omCost
		Current Year CY PY Goal	Last 3 Months CY PY Goal	Last Month CY PY Goal	Current N CY	lonth Goal
	Sales	264,617 懀 😑	264,617 懀 😑	123,934 懀 😑	41,610	0
	GP	70,730 🖊 😑	57,044 🖶 😑	18,639 🖊 😑	13,686	0
	Avg GP/Order	51 🖊 😑	51 🖶 😑	44 🖊 😑	51	0
	GP %	21.6 🔶 😑	21.6 🖊 😑	0.0 🖊 😑	32.9	0
	Activition	0	0	0	0	

If you click on an arrow for CY/PY or Goal comparisons it will bring up a screen that will display figures that correspond to the metric you are looking at.



Current Year CY/PY Comparison



Current Year CY/PY Goal Comparison



Below the SalesRep Score Card, you will see your Category/Group/Class/Vendor Score Card. Here you will find figures for Item Category, Market Groups, Sales Classes, and Vendors for Sales and Gross Profit all with CY/PY comparisons. You will also see how your sales are comparing to the rest of the company with % of Sales SalesRep vs % of Sales Company in the previously mentioned groups. The column labeled Activities is where your activities populate if they are assigned to the corresponding group.

			SalesRep	Review				Adminie
Category/Group/Class/Vendor Score Card Basis								mCost
Category			*	Curr	ent Year		*	
Category		5	Y Sales PY Goal	% of Sales	S of Sales	CY GP PY Goal	CY GP % PY	Activities
EQUIPMENT			61,298 懀 😑	23.2	9.0	7,475 👚 😑	12.2	0
CHEMICALS			53,968 懀 😑	20.4	26.0	10,406 懀 😑	19.3 😔	0
PAPER			40,647 😽 😑	15.4	24.9	8,738 🖊 😑	21.5	0
PARTS			27,739 😽 😑	10.5	6.8	4,587 🖊 😑	16.5	0
ICE MELT			26,982 懀 😑	10.2	8.8	7,433 👚 😑	27.5	0
MAINTENANCE PRO	OUCTS		19,801 🖊 😑	7.5	8.7	4,998 🖊 😑	25.2 😔	0
GARBAGE BAGS			19,765 😐 😑	7.5	8.1	4,579 懀 😑	23.2	0
MISC			8,082 😽 😑	3.1	2.9	6,834 😽 😑	84.5 👚	0
				12				
New Custo	mar Score	Card						
Customer List		ound						
FirstYear	FirstMonth	CustCount	OrderCount	Total Sales	TotalGP	GPPercent		
2015	April	8	29	12082.84	2292.78	18.98		

Below the scorecard is the New Customer Score Card, listed here will be the following figures for new customers: FirstYear, First Month, CustCount, Order Count, Total Sales, Total GP and GP%. This tracks new customers for 13 months. To see the list of customers click on Customer List

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If you would like to look at the Sales and GP figures for Market Groups, all one has to do is click on the drop down labeled Category, do the same if you want to see Sales Class or Vendor figures. To change the time period you are looking at, click on the drop down labeled Current Year. Time periods that are available other than Current Year are, Current Qtr, Last Qtr, and Last Month.

Category	-		Curr	ent Year		-	
Category		<u>15 PY</u> Goal	% of Sales SalesRep	% of Sales Company	CY GP PY Goal	CY GP % PY Ac	tivitie
		98 懀 😑	23.2	9.0	7,475 懀 😑	12.2 🖊	
Sales Group		38 懀 😑	20.4	26.0	10,406 懀 😑	19.3 💛	
Sales Class		\$7 🖊 😑	15.4	24.9	8,738 🖊 😑	21.5 🔶	
		39 🖊 😑	10.5	6.8	4,587 🖶 😑	16.5 🔶	
Vendor		32 🕇 😑	10.2	8.8	7,433 懀 😑	27.5 🕇	
MINTERANCE PRODUCTS	10,6	D1 🖊 😑	7.5	8.7	4,998 🖶 😑	25.2 💛	
ARBAGE BAGS	19,76	65 💛 😑	7.5	8.1	4,579 懀 😑	23.2 懀	
AISC	8.08	R2 📕 🗀	3.1	2.9	6.834 🖶 😑	84.5	

Category	•		Current	Year	*			
Category	CY Sales PY Goal	<u>% o</u> Sa	Current Ye		<u>3P %</u> PY <u>Ac</u>	Activitie:		
EQUIPMENT	61,298 懀 😑						12.2 🔶	(
CHEMICALS	53,988 懀 😑		Current Qt	r			19.3 💛	(
PAPER	40,647 🖊 😑		Last Otr				21.5 🔶	
PARTS	27,739 븆 😑						16.5 🖊	(
ICE MELT	26,982 懀 😑		Last Month	•			27.5	
MAINTENANCE PRODUCTS	19,801 🖊 😑		1.0	0.7	+,320 🔺 🗡		25.2 💛	
GARBAGE BAGS	19,765 💛 🤤		7.5	8.1	4,579 懀 🤤		23.2 💧	
MISC	8.082 🖶 😑		3.1	2.9	6.834 🖶 🤤)	84.5	

If you want to see how your customers are performing in a certain Item Category compared to previous year, click on the underlined category you want to look at. The same can be done with the other choices in the drop down as well. If you want to compare Last Month's figures to the previous year, choose Last Month from the drop down before clicking on the Item Category.

CustomerName	CY Sales	PY	CYTD GP	PY	CY GP %	PY	Activities
Amazing Floor Care	9,057	1	2,749	1	30.4	÷.	Activities
Babel Baptist Church	548	1	281	1	51.3	1	
Calvary Christian Academy	634	1	327	1	51.6	1	
Cosby Consulting	239	1	119	1	49.8	1	
Exceptional Value Hardware	328	1	164	1	50.1	1	
Indianapolis Colts	0	ŧ	0	ŧ	0.0	ŧ	
Jillians Entertainment	0	¥	0	¥	0.0	+	
Life Care Center	812	1	387	1	47.6	1	
Lynhurst Health Care	1,291	1	765	1	59.3	1	
Major Hospital	4,687	1	1,178	1	25.1	1	
National Institute for Fitness	508	1	271	1	53.4	1	
Precious Metals	0	•	0	1	0.0	0	
Toms Cleaning Service	626	1	197	1	31.5	+	
				A			

Just like the Score Card for the rep, you will notice that goals can be set for Item Categories, Market Groups, Sales Classes, and Vendors for comparison between Sales and Gross Profit. Click on the arrow that indicates there is a goal set up to do so. You can change the time frame prior to see the figures compared with the time frame you have chosen.

Category	•	Curr	ent Year		•		
Category	<u>CY Sales PY</u> Goal	% of Sales SalesRep	% of Sales Company	CY GP PY Goal	CY GP % PY	Activities	
EQUIPMENT	61,298 👚 🤤	23.2	9.0	7,475 숨 😑	12.2	0	
CHEMICALS	53,988 懀 😑	20.4	26.0	10,406 🕈 😑	Haad	or	
PAPER	40,647 🖶 😑	15.4	24.9	8,738 🖶 😑	пеац	er	1
PARTS	27,739 🔶 😑	10.5	6.8	4,587 🔶 😑	CY GP:	10,406	
CEMELT	26,982 懀 😑	10.2	8.8	7,433 👚 😑	GP Goal:	000	
MAINTENANCE PRODUCTS	19,801 🖶 😑	7.5	8.7	4,998 🖶 😑	Var Amt: Var %:	0 %	
GARBAGE BAGS	19,765 💛 🚍	7.5	8.1	4,579 👚 😑			
MISC	8,082 👆 🤤	3.1	2.9	6,834 🖶 🤤			



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

