

SNAP for Users * STEP1 User Group Meeting 2017 *

This session will walk you through SNAP Notes and Documents and how they can be attached to customers, items, vendors, etc. and help you better organize your internal documentation. We will also give you an overview of the SNAP Level 2 option and how it can help your company to collaborate, share and inform. In the process, we will also discuss STEP1's optional cloud storage interface (S4), which streamlines uploading files into SNAP and the SNAP inbox which provides a way to forward email into SNAP.

SNAP Overview:

1. Advantages of using SNAP Notes instead of the old Customer & Vendor 'Notes/Memos'

- SNAP Notes are individually listed with a subject line and date vs 'everything in one memo'
- SNAP Notes can be added by any user, instead of just users allowed to modify customer info.
- Viewing a Note can be Restricted to specified users or groups of users.
- Comments can be added to a Note by anybody that can view that Note.

2. SNAP Documents for Customers, Vendors, etc.

- Examples: Customer Resale Tax Certificate, Credit App (restricted View)

3. SNAP Note Links

Notes can be linked to Photos, Video links, PDF files, KBDocs, etc

- 4 types of Note Links are available.

- **URL:** Links to anything on the internet that is viewable in a web browser (ie Videos, WebSites)
- **S4:** Links to a file in your S4 Cloud Storage (ie JPG Photos, PDF Files).
- **KBDoc:** Links to a document setup in your KBDoc database.
- **Query:** Links to a Saved SQL Query (with optional CustID, VendorID, ItemID parameters).

Tips: Use KBDoc Note Links for 'always up-to-date' Checklists, etc.

- KBDocs can also be used for Rich-Text-Format if needed (ie Bold, Colors, etc)).
- SNAP S4 links are best used to display finished documents, not to share files or unfinished docs.

4. A SNAP Note can be Attached To one or more 'AttachTos'

- When you add a Note, it will automatically set the Attach-To(s) based on your 'Context'.
 - Example: When you add a Note to a Customer Order, it will automatically attach to that Order and that Customer.
- There are 20 different Attach To's available
 - Customer, Customer Contact, Customer Product, Customer Order, Customer Invoice
 - A/R Pmt, A/R Bal Adjustment
 - Vendor, Vendor Contact, PO, Vendor Invoice, A/P Pmt, A/P Bal Adjustment
 - Item, Rebate Contract
 - SUM/CorpAcct, Customer Pmt Group, Customer Pricing Class
 - Service Dept Machine
 - G/L Account, GL transaction (For better security, these can only be setup from within GL module)

5. Attaching Notes to Transactions

- Transactions like Orders, Invoices, and Adjustments Often have supporting documents
- SNAP Example: Customer Order Notes & Docs

SNAP Level 2 Overview:

1. **SNAP Level 1** facilitates **informational** (after the fact) Notes and Documents. **Level 2** promotes a **collaborative** effort to accumulate ideas/information and then resolve/close the Note to be saved for historical purposes.

2. **Example:** Customer Service can document a situation by attaching a Note to the customer and putting the Sales Rep, Sales Manager and Service Manager in the loop using SNAP Attention and/or FYI. Example: Wally needs to be updated about a situation with his favorite customer.

3. New SNAPDash Module in 7.38

With the option to Attention and FYI staff, we now need the SNAP Dashboard Module to view your Notes.

• SNAPDash Module Tab Overview - with Tab Counters to show number of Notes (UnViewed/Total):

- **My Notes:** Author / Delegate relationship & responsibilities.
- **Attn Notes:** View Notes & Comment as needed. Note will stay in list until Note is Resolved/Closed.
- **FYI Notes:** View Notes & Comment as needed. Note will stay in list until Viewed.
 - Discuss: Closing Notes, Remove from My Notes Tab, or after viewed will remove from Attn Notes.
 - Discuss: 'Mark as UnViewed' for highlighting. Available everywhere, not just in SNAPDash.
- **Alerts:** Step1 System Alerts (Purchasing Stock Out Alerts, Backup Logs, etc.) can be saved as SNAP Alerts instead of being sent to the user's email address. (This option is turned off by default, can be turned on once everyone is checking SNAPDash)
- **To-Dos:**
 - Can be self-added or manager-added (or auto-added by Step1).
 - Multiple To-Do's Can be attached to a Note, to facilitate a check list, or as a standalone To-Do.
 - Has Due Date and Active Date (The Active Date is when it will show up in your To-Do list).
 - Mark as Done (with To-Do Manager Review if necessary).
- **To-Do Manager:**
 - Setup/Monitor the status and due dates for the To-Do's you have assigned to others
- **SNAP Projects:**
 - A SNAP Project is a group of related Notes and Docs
 - Each Note in the project may have several ToDos attached (Docs can only have one To-Do).
 - A Project Team can be assigned; all members of the team can modify Notes & Docs in the project.
 - Project Managers and Project Co-Managers can modify the project.
 - Project parameters such as restricted viewing, status, etc. are available to project managers
 - If 'Show Open Project Notes in Users SnapDash' is set to Y, Open Notes will be suppressed from your staff's SNAP Dashboards.
- **KBDocs:**
 - Setup view and modify knowledge base documents
 - Knowledge Base documents allow for formatting, fonts, etc.

SNAP Level 2 option adds \$25 to your STEP1 monthly support fees.

SNAP for Supervisors * STEP1 User Group Meeting 2017 *

SNAP has more powerful features than the average user will be able to utilize, especially when they first get started. SNAP for supervisors covers topics that your company may evolve to using after your staff are solid in the basics and become familiar with SNAP level 2 concepts

1. SNAP Dash Board Supervisor Options, Continued from SNAP for Users

- Search Notes: You may allow searching of notes for all users, but it is a tool used frequently by Supervisors
 - Searching Note info by subject, sub-topic, author, note text, etc.
- SNAP Admin:
 - Tabs for monitoring SNAP Usage
 - If a Note/Doc is 'Deleted', the data record is not actually physically deleted/purged until 30 days later, to allow easy recovery of mistaken deletes.

2. SNAP InBox

- A good way to get existing and on-going email content into SNAP (get it out of email by forwarding it to SNAP).
- Example: Attach a Customer PO to an Order. (see customer PO under Bronson)
- Example: Attach a Vendor Confirmation and A/P Invoice to a PO. (Central Purchasing Supply Invoice S2006286.001)
- Can be automated using SNAP Inbox Commands.
- This requires an email account, for example snap@domainname.com.
- Do not have vendors or customers forward directly to you snap email account, Emails should be selectively forwarded.
- To avoid junk mail cluttering up your SNAP system, keep this email private for internal staff use only.
- Although forward email to snap is a huge timesaver, email reformatting is often required.

3. SNAP is NOT Email - SNAP Works differently than email

SNAP is designed for clearer communication and better collaboration within a business.

- Each Note/Doc/ToDo is stored in the SNAP Database. They are never 'sent' to anybody. (You have control of you records)
- If a Note is Attached To a Customer and an Order, there is still only ONE copy of the Note.
- Even if a Note is Attn/FYI to ten different users, there is still only ONE copy of the Note.
- Everybody is always looking at the SAME NOTE. So if an Author makes changes, or someone adds a Comment, those changes are immediately available to anybody that can view the Note.
- The Note author (and their delegate, if any) retain control of the note text, shown at the top when viewing a note.
- Other Viewers can only comment and are therefore less likely morph your note into a different subject.
- SNAP information is not buried & lost in somebody's email inbox, unavailable to others.

4. Summary of S4 - Step1's Cloud Storage Interface:

- S4 is built on top of Amazon Web Services (AWS) Simple Storage Service (S3).
- S4 stands for 'Step1 Simple Storage Service'.
- S4 makes it easy to upload, store and link to your photos and documents.
- In Data Maintenance, the 'S4 Cloud Storage' tab provides a way to explore your cloud storage/files.
- S4 requires that you sign up for an AWS account and provide STEP1 staff access to configure your account.
- Monthly expense for your AWS are minimal, are based on space used, average costs are under \$10/month.
- The S4 interface fees from Step1 are \$25/month

S4 can be used to store your PODScans and (local/private label) SDS files, and can also serve as a reliable off-site archive for your Step1 Data Backups. (Discuss/Show S4 Cloud Storage Tab)

4a. Advantages of using S4 as an offsite Archive for your Step1 Data Backups.

- Your Step1 Data Backup can be automatically uploaded to S4 when your Step1 Data Backup/Archive procedure is run overnight.
- Since your Step1 system is controlling the archive upload, it can compare the filesize before and after to verify that the upload was successful. (Not a 'Blind' backup).
- Upload details including file sizes are listed in the Backup Log for easy supervisor verification.
- Storing up to 6 months of daily backups in S4 is very inexpensive. (The average Step1 Backup file size is 400MB. Storing 200 days (80GB) of backups only costs about \$1.25 per month!).

4b. Advantages of using S4 to store your PODScans.

- Always backed up (redundant cloud storage).
- S4 can auto-delete PODScan files after 2 years (or whatever time, which avoids using up your server disk space to store old, no longer needed PODScan files.
- Easily available to users inside and outside of your firewall (No DNS/Step1 configuration issues like there are if stored on your server).

5. SNAP User Options

- 'Is This User a SNAP Administrator?' Allowed to modify other staff's notes (Use with caution!)
- 'Show Search Tab in SNAP Dashboard?' Allows user to search any note that is viewable to them.
- 'Allow To Setup Customer Documents'
- 'Allow To Setup Vendor Documents'
- 'Allow To Set Note/Doc View Control To Public'
- 'Allow to See S4 Storage Tab in DMAIN' (Yes, No, Only Show S4 Tab) *
- 'Restrict User S4 Bucket Access' *
- 'Show Report Archives S4 Bucket' *
- 'Allow to Override S4 Upload Options' *

* These user options control access in DMain. For Example, Backups and other buckets in DMain should be restricted.

6. Overview of SNAP System Options in the Supervisor's Module

- A Day-End Queue procedure is automatically run every night by DBQ to handle Purging and SNAP Maintenance tasks.
- Notes/Docs can be Archived instead of deleted, so they will no longer show up in Note/Doc Lists, but will still be available for searching and review.
- File Viewer Options allow you to use STEP1's built in viewer. This prevents files from accidentally being saved on local computers and keeps the window focus in STEP1 rather than popping up another program. In STEP1's viewer, under the View menu, you can still use the 'View in browser' option when needed.
- AR Call Notes is an optional way to help keep AR collection activities better organized. This option is built on SNAP, AR Call Tracking will be covered in detail in the Bookkeeping Session.
- Sub Topics are required on SNAP Note/Doc setup and allow you to organize, search and categorize notes. Pre-defined SubTopic defaults can automatically set AttachTos, AttnTos and FYIs, View Controls, and also help disseminate written procedures and instructions in the default SubTopic text. (Huge click saver).

SubTopic defaults and Auto-Add Note Options will be covered in more detail in the Advanced SNAP Session.