

Advanced SNAP Breakout Session Outline

In this session, we will dig deeper into several of the topics covered in 'SNAP for Supervisors'.
(Note: Everything outlined here is available in both SNAP Level 1 and 2, unless otherwise specified).

S4 Cloud Storage Interface

What is S4 and what is it used for? (Quick Review)

- S4 is Step1's interface into AWS' S3 Cloud Storage Service.
- S4 makes it easy to upload, store and link to your photos and documents stored in the cloud.
- It can automatically upload email attachments from emails forwarded to your SNAP InBox.
- In addition, S4 can automatically resize and shrink large JPG photos before uploading them to the cloud. This reduces storage space needs (and costs), and also speeds up downloads.
- By default, all content uploaded to the cloud via S4 is stored as 'Private' files, that are secure and not accessible via a web browser.
- All transmissions to/from S4 cloud storage are encrypted.
- S4 can also be used to store your PODScans and (local) SDS files.
- It is also used to store historical G/L Reports printed/saved to the 'Step1 Report Archives'.
- S4 can serve as a reliable off-site archive for your Step1 Data Backups.
- In summary, S4 provides reliable, secure, inexpensive OFF-SITE storage for your Step1 Data, which is critically important these days with the increasing occurrence of malware attacks such as the recent ransomware, that could infect and completely take down your Step1 server.
- So, even if your Step1 server did go down completely (for whatever reason), and all server files were lost, if you are using S4 to Archive your Step1 Data Backups and store your PODScans & SDS files, we could help you get your Step1 system back up and running in a couple of hours, using your previous night's Step1 data backup.
- Obviously you still need to be taking the basic security precautions, such as keeping your server and workstation windows updates current, and running a/v software, etc. but the important point here is that in addition to its other uses, S4 can provide a safety net to help you get back up and running quickly if disaster strikes.

SNAP Note Link Types (S4/URL/KBDoc/Query)

S4 Link Type: (Requires the S4 Interface)

- Links to a file (object) in your S4 Cloud Storage (ie JPG Photos, PDF Files).
- You will usually be Uploading a new file to S4, and then link to that.
- Can also link to an existing S4 Object (Select Bucket and Object (with prefix to filter))
- BE CAREFUL if linking to an existing S4 Object! If another SNAP Note linked to that object is deleted (along with its Linked S4 Objects), then other links to that S4 Object would be broken.

URL Link Type

- Can link to anything on the internet that is viewable in a web browser (ie Videos, WebSites)

KBDoc Link Type:

- Links to a document previously setup in your KBDoc database.

Query Link Type:

- Links to a Saved SQL Query that has been previously setup in your Query module.
- Supports embedded parameters for :CustID, :VendorID and :ItemID, which will automatically be set to the corresponding Customer, Vendor and Item AttachToIDs for that Note.
- For example, below is some SQL to query a Customer Product Price List for a Customer, that includes a :CustID parameter. This could be setup as a Saved SQL Query (for SNAP or ALL modules), and then Linked to a SNAP Note Attached To a Customer. When that Note is viewed, clicking the Link button will automatically substitute the CustID for that Note's Customer into the :CustID parameter, and then execute the SQL to query the list of that Customer's Product Prices.

```
SELECT CustAcct, ItemSubCat, ItemCode, ItemType, ItemDescription,  
PriceUnit, ListPrice, CurrentPrice  
FROM vCustomerProducts  
WHERE CustID = :CustID  
ORDER BY ItemSubCat,ItemCode
```

SNAP System Options (SysOpts/SNAP tab in Supervisor Console)

- SNAP Data Maintenance Controls.
 - Auto-Archive Defaults (used to initialize the Auto-Archive fields when adding a Note/Doc).
 - Step1 Viewer Controls (for JPG/PDF/TXT linked files)
If a Step1 Viewer is not used, your web browser will be used to view that type of file/link. (Step1 Viewers are built into the Step1 modules, so can preserve control/focus. Browser is separate, but may be better in some circumstances (ie very large or non-standard PDFs).
 - A/R Call Note Controls.
 - WSR & CSS Cart/Order Note Default SubTopics (Level 2).
 - Customer, Vendor and Item/Part Setup Note Controls (Level 2).
 - SNAP Topic and SubTopic lists with Add/Modify/Delete options.
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SNAP SubTopic List 'Select' filter options (N/D/B/S)

To help limit the number of entries in the SubTopic select lists, and filter out irrelevant SubTopics, each SubTopic is assigned a 'Select' filter option to control which SubTopic lists it should show up in:

- N = (Note) Only show when selecting a SubTopic for a Note.
- D = (Doc) Only show when selecting a SubTopic for a Document.
- B = (Both) Show when selecting a SubTopic for a Note OR Document.
- S = (System) This SubTopic is used for internal/system purposes (ie System Alert), and will not show when selecting a SubTopic for a Note or Document.

SNAP SubTopic 'Limited User List' filter options

In addition to the 'Select' filter options, SubTopic lists can also be filtered by User to limit which SubTopics are available to particular Users (or User Groups).

Each SubTopic can be assigned to 1 of 3 User List Control options:

- All Users: Show in SubTopic lists for ALL Users.
 - All Except: Show for All Users EXCEPT the specified Users and/or User Groups.
 - Limited To: ONLY show this SubTopic for the specified Users and/or User Groups.
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SNAP SubTopic Defaults

Several Default values can be set for a SubTopic that will automatically be copied to a Note when that SubTopic is selected. The SubTopic Defaults available are:

- Note Text
- View Control (AllUsers/Restricted (with Restricted User/Group lists))
- Attn and FYI User/Group lists (Level 2)
- Delegate User (Level 2)

How to use SubTopic Defaults (all of these examples use SNAP Level 2):

- You can setup a special SubTopic (with a default DelegateUser) that will automatically be assigned to any CSS cart/order Note submitted by a customer. Then that Note will show up in the DelegateUser's SNAPDash (in MyNotes), so they can promptly take care of whatever might need to be done, such as modifying the order's shipping instructions, etc.
 - Same idea as above for WebSalesRep cart/order Notes submitted by your SalesReps.
 - When setting up a new Customer, SNAP can automatically add a Note to coordinate the tasks to be done (potentially by several different people) to get all of the initial data setup for the customer. You can setup SubTopic Defaults that will copy a task checklist into the note text, specify a Delegate user (if one person will coordinate All new customer setups), and add user(s) to the Attn/FYI lists as needed. (It will auto-add (branch) CreditMgr and SalesMgr to Attn list).
 - Same idea as above to help with setting up new Vendors and Items/Parts.
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SNAP Data Maintenance and how it works

- Auto-Archive options (Manual/Archive/Delete xx Days after Closed)
- Deleting/Purging Notes, Docs & ToDos (won't be Purged for 30 days after Delete)
- SNAP Administrator can use SNAPDash to View/modify Notes Flagged for Deletion
- Day-End Queue Procedure is automatically run daily to handle SNAP Data Maintenance:
 - a. Flag Notes/Docs/Alerts to be Purged from the SNAP data tables (based on Purge Date)
 - b. Purge Comments, NoteLinks, S4Objects (based on options), etc for Notes to be Purged
 - c. Purge flagged Notes/Docs/Alerts (Purge = Physically delete records from the data tables)
 - d. DBQ will then follow the same steps to handle data maintenance for SNAP ToDos.

General Q&A/Discussion (other ideas for using SNAP???)