# **v.7Training**

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

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



## ORDER DESK

#### IN THIS GUIDE

- ENTER A CUSTOMER ORDER
- · ENTER A CREDIT MEMO
- ENTER AN EXCHANGE
   ORDER
- · ENTER A QUOTE
- PLACE NEW UNPURCHASED ITEMS ON A CUSTOMER'S PROFILE
- · ADDING REFERENCE ITEMS

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

MOST MODULE TRAINING SESSIONS TAKE ABOUT AN HOUR

## TO GET STARTED

OPEN THE FOLLOWING MODULES: • ORDER DESK



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

www.STEP1.com



## In this section of the guide you will learn how to enter a Customer Order.

Once you've opened the Order Desk Module, Click on the Customers tab and zoom to: Chicago Judicial Center and Click "Order Entry/Modify"

<b>W</b>	🤴 Order Desk * STEP1 Supply (Chad Demo) – 🗆 🗙										
<u>F</u> ile <u>S</u> earch	<u>R</u> eports Saved <u>Q</u> ueries <u>H</u> elp										
Customers P	Customers Pending Orders Pending Quotes Pending Service Orders Review Sales Leads Task List TaskList Mgr Cust News										
CustAcct	CustomerName	City	State	SmanCode	OfficePhone	~	Order Entry Mandity				
BUSYB100	Busy Bee Cleaning Service	Embarass	IN	WALLY	317-984-9668	•	Order Entry/Woolly				
BUYER100	Buyers market	Real Estate	IN	GJONAS	765-754-7122						
CALVE100	Calvery Lutheran Church	Fokersbery	KY	WALLY	317-783-2000		Customer Status				
CHANC100	Chance's Supply	No Way	IN	GJONAS	317-774-0700						
CHARL100	Charlie's Angels Bar	Mercury	MN	GJONAS	765-674-5984						
CHATS100	Chatsworth Floors	Dorothy	IN	WALLY	317-594-1182		Send CProd Order Form				
CHICAG12	Chicago City Memorial Hospital	Tipton	IL	GJONAS	765-655-8700		Send Catalog Order Form				
CHICAG30	Chicago Judicial Center	Chicago	IL	WALLY	312-734-1233						
CHICAG10	Chicago Unified School District	Chicago	IL	WALLY	532-345-8100		Send Statement				
CHIST100	Chister Supply	Skokie	IL	WALLY	312-944-7205		Statement Comments				
CHUCK100	Chuckies	Barrington	IN	PLEWIS	317-578-2221						
CHUMP10	Chump Advisory Board	Yeahrite	IN	BOB	317-262-3410		⊻iew Order/Invoice				
CICER100	Cicero Fiddles	Spokane	IN	GJONAS	317-984-4653		Order //nuett:				
CITYF300	City of Fergus Falls (Fire Dept)	Mercury	MN	MHUGHES	317-477-4430		oldel/invc#.				
CITYF400	City of Fergus Falls (garage)	Fergus Falls	IN	MHUGHES	1-317-477-4390		Copy Order/Invoice				
CITYF500	City of Fergus Falls (sidewalk ro)	Fergus Falls	IN	MHUGHES	317-477-4380		Marilla Castanan Isla				
CITYF600	City of Fergus Falls (water)	Fergus Falls	IN	MHUGHES	317-477-8545		Modiry Lustomer Inro				
CITYF200	City of Fergus Falls- animal contr	Fergus Falls	IN	MHUGHES	317-477-4387		Setup a <u>N</u> ew Customer				
CITYF100	City of Fergus Falls-Wildlife	Fergus falls	IN	MHUGHES	317-477-4367		Setup a New ShipTo				
CITYW100	City of West Portage (Parks Dept)	West Portage	IN	JSAMUELS	765-775-5110						
CLARK100	Clark Kent Flying School	Gotham	IN	MHUGHES	317-535-7579/53	Υ.	<u>Hetresh Customer List</u>				
<					>		772 Customers				
Connected to	Server		STEP1 S	oftware v7.	3526 CHI	CAG	GO CMS				

Towards the middle of the screen and all the way to the left you'll see the Customer Products tab already highlighted. Below that is a list of all the items that this customer has purchased in the past. (Items in Red are Due for Reorder.) Notice it shows you on screen this customer's price for each item and the last time they bought it. Within the item list the highlighted cell is in the Item Code column, Use the arrow keys to move the highlight to the right, into the CPDescription Column.

<b>W</b>	Order Desk * STEP1 Supp	ly (Chad Demo) – 🗖	×
<u>F</u> ile <u>E</u> dit <u>S</u> earch <u>V</u> iew <u>R</u> eports <u>H</u> elp			
Chicago Judicial Center	View	w Current Order Modify Customer Info Customer Status Customer WebSite	E <u>x</u> it
Main Customer Notes   Credit   Pending Orders   Open Invoice	es Ledger History Invoice <u>H</u> istor	ry   Rebate Contracts   CPM Contract Prices   CPM Policies	
Bill To: Chicago Judicial Center	Account#: CHICAG300	Order Ship To: Chicago Judicial Center	
Bill Address 1: 8048 S. Exchange Ave Bill Address 2: Suite 3349	Salesman: WALLY Price Opt: d10	Ship Address 1: 8048 S. Exchange Ave	
City,StateZip: Chicago IL 60617	r noo op. are	Ship Address 2: Suite 3349	
Contact: Bobby Davis	Route/Day <b>Chgo/Tue</b>	Citu State Zin: Chicago	
FAX: 312-734-1233	Carrier Truck 2		
Terms: Net 45			
Resale #: III 26-0799-87	Sales Class: A	Tax Freight? N Corp Dept: C-JUD	
Contact Maxine (ex 201)	Calc Class: B	Charge Freight? Y Pmt Group:	
with any credit issues	Market Group: GOVT	AgeStatus: HId CPM Class: City	
Current Order Summary: 0 Lines \$0.00 Total		Add Item to Order Item Status QtySold History Price I	History
Customer Products Due for ReOrder Inventory Items Sale Iten	15		
ItemCode T C CPDescription	CurrentPrice PriceSource	Last Price LastSaleDate Last Qty SubCatCode Cus A Show Item Type	s)
01915-12     I A Super Lemon Plus Degreaser 8oz	58.80 d10 Cust	35.00 1-Sep-2013 3 10-AIRFR	i II
014D) (5221 M C Advance PA 5221 Auto Serubber	Z.14 dIU Lust	1.73 15-May-2013 24 10-DE0D0 V Labor Items (L	.)
0420-55 I C Film Free Glass Cleaner	390.57 B6 CProd	390.57 15-May-2013 0 10-GLASS ✓ Machines (M)	
06143 I C First Choice Carpet Pre-Spray	14.83 B5 CProd	14.83 15-May-2013 2 10-CARPE	(P)
07531L I B Stratus 3 Dispenser	20.99 S CProd	20.99 1-Sep-2013 38 10-AIRFZ Show Disconti	nued?
101000 I A Spartan Shineline Seal 5gal	69.10 d10 Cust	65.00 15-Nov-2014 12 10-LAUND Sort Options	
140 I A Dazzle Floor Finish	100.65 d10 Cust	69.96 5-Dec-2012 1 10-FLOOR JUD-14 C CPDescription	n
162 I B Pristine II Cleaner/Sealer	52.00 B5 CProd	52.00 8-May-2013 4 10-FLOOR • ItemCode	.
190108 I A 25" Front Mount Squeege Kit	U.UU S CProd	0.00 1-Sep-2013 1 30-VAL22 O Type/Cirbes	de 📗
206LN I B 20 Black Strip Pad	21.04 B6 CProd	21.04 273an-2013 5 40-PADEL O SubCat/CPD	esc
251 I C Enhance Cleaner/Maintainer	51.68 d10 Cust	Search in Current Column X	
2818BE I D 28 qt Wastebasket	3.33 B6 CProd	Search in Current Column	
3302-VAR I C Metered Aerosol Variety Kit	40.00 B6 CProd		
351BZ I A 35qt Unibody Mopping System	120.58 d10 Cust	Field Value	a d
353 I B Nu-Tra Shine Sealer	32.24 B5 CProd	Dials Lation 1	
<		Fink Lotion	
Connected to Server		Carel Tra	
		<u>Search Type</u>	
		Case-sensitive	н.
The first item we want is Big Pink Lo	tion Soap. To		н.
find it hold down the Control Key and	d press "Z" to	C. Evect Match	н.
onon the searching window. In the F			н.,
		Partial Match at Beginning	н.,
type the wordPink Lotion and hit	Enter.	G. Bastial Matala Annulasia	н.
		<ul> <li>Fartial Match Anywhere</li> </ul>	н.
		Fields	
		CPDescription	
		First Next 🖌 Cancel	

#### **ORDER DESK**

Now that the system has highlighted the item you were looking for, you can click the Add Item to Order button or just double-click on the item line.

*	Order Desk * STEP1 Su	pply (Chad Demo)	_ 🗆 🗙
<u>F</u> ile <u>E</u> dit <u>S</u> earch <u>V</u> iew <u>R</u> eports <u>H</u> elp			
Chicago Judicial Center	V	Tiew Current Order Modify Customer Info	Customer Status Customer WebSite Exit
Main Customer Notes Credit Pending Orders Open Invoice	s Ledger History Invoice <u>H</u> is	story Rebate Contracts CPM Contract Price	es CPM Policies
Bill To: Chicago Judicial Center	Account#: CHICAG300	Order Ship To: Chieses Judicial C	antor
Bill Address 1: 8048 S. Exchange Ave	Salesman: WALLY		
Bill Address 2: Suite 3349	Price Opt: d10	Ship Address I: 8048 S. Exchange	Ave
Lity,StateZip: Unicago IL 60617		Ship Address 2: Suite 3349	
Telephone: 312-734-1233	Route/Day Chgo/Tue	City,State,Zip: Chicago	IL 60617
FAX: 312-734-1234	Carrier Truck 2	Ship Attention:	
Terms: Net 45		Sales Tax? Y Corr	
Comments: Always call before shipping	Sales Class: A	Tax Freight? N Corp	Dept: C-JUD
Contact Maxine (ex 201)	Calc Class: <b>B</b>	Charge Freight? Y Pmt	Group:
with any credit issues	Market Group: GOVT	AgeStatus: HId CPM	Class: City
Current Order Summary: 0 Lines \$0.00 Total		Add Item to Order	Item Status QtySold History Price History
Customer Products Due for ReOrder Inventory Items Sale Items	s		
ItemCode T C CPDescription	CurrentPrice PriceSource	Last Price LastSaleDate Last Qty Subl	CatCode Cus 🔨 Show Item Type(s)
A05113 I C Bulldog Loop Mop,Large	6.37 B3 CProd	6.37 1-Sep-2013 17 40-M	10PSW Stock Items (I)
A430120 I B Go Go Blue Blend Mop,20oz	<b>3.50</b> c Cus/Con	40-M	IOPSW Vion-Stock (N)
A70412 I C Stallion Mop Handle	11.83 B6 CProd	11.83 1-Sep-2013 12 40-H	ANDM Kits (K)
CT-44444 I B Delimer Concentrate	14.69 B6 CProd	13.99 17-May-2012 0 10-F	00DS Machines (M)
D3624 I C 24" Standard Plus Dust Mop	9.98 B5 CProd	9.98 27-Jan-2013 5 40-D	USTM Service Parts (P)
FG7570L20000 I C 3" Caster w/ Insert	5.50 S CProd	5.50 14-Mar-2013 12 40-B	UCWR Show Discontinued?
JZ3349 I A Stanless Steel Cleaner	4.20 B7 CProd	4.20 26Jun-2013 48 10-A	ERUS Sort Options
PT20112 I P 1 Plu Jumba Tianua	22.10 D20 CProd	0.00 15 Nov 2014 1 20 A	ANDM C CPDescription
BA008 L & Disinfectant Sprau	3.10 D30 Child	3 91 21 Jul 2013 0 10 4	FROS
BH101 I B Big Pink Lotion Soap	7.59 B2 CProd	7.59 21 Jul-2013 5 10-H	IANDS O Type/ItemCode
S434822K I B 56 Gal. Hi-D 22 MIC Liners	28.28 S CProd	28.28 29-Mar-2013 2 20-L	HIGH C SubCat/CPDesc
SH-020-C I A Shine Glass Clnr -ConcentrateD	25.20 d10 Cust	19.38 21-Jul-2013 2 10-C	ONCE
SN082433 I B 16 Gal. Hi-D 8 MIC Liners	24.46 B8 CProd	24.46 1-Sep-2013 2 20-L	HIGH
T-500 I C Heave Duty Tissue	64.59 B5 CProd	64.59 16-Sep-2012 1 10-H	IANDZ
TB224348 I A 56 Gal. Hi-D 22 MIC Liners	25.09 B7 CProd	25.09 1-Sep-2013 2 20-L	HIGH Items Due for ReOrder
SPECIAL L Special Order Items	1.44 S CProd		
<		Add Item	to Order
Connected to Server		Item: Big Pink Lotion Soap	Code: RH101

Once you've done that, a new window will open with the number in the quantity field highlighted. Before we move on just take a minute to look around this window. You'll see that it shows your stock levels & pricing information. The screen also shows this customers pricing option and gives you the opportunity to change it for this order. You can also set the price that you type into the price field to be a "One Time Price" by checking the box on the bottom left. If you have multiple warehouses you can check the stock levels in each of them, by clicking on the View All Warehouse Stocks Button. OK, back to the order, change the quantity to 3 by highlighting the number already there (if it isn't still highlighted) and typing over it. Click OK to add the item to the order.



Search in Current Column
Field Value
shineconc
Search Type
Case-sensitive
C Exact Match
C Partial Match at Beginning
Fields
CPD acceptation
Fi <u>r</u> st <u>N</u> ext X Cancel

After adding the Lotion Soap Successfully you should be back at the Customer Products list on the Main Screen. Now we want to add Shine-Glass Clnr Concentrated and to find it hold the Control Key and press "Z" like you did before, to open the searching window. This time in the Value line we're going to give it multiple criteria to search for. Type in Shine..Conc and what this is telling the system is find an the item that starts "Shine" and contains "Conc" somewhere else in the description. The DOT DOT is like a wildcard, in this case meaning, we don't care what if anything is between Shine & Conc just find those to words in the description.

Once you've got the item you want highlighted, click the Add Item to Order button. This time we're going to order 1, so make sure the quantity is 1 and click OK.

<b>W</b>	Order Desk	: * STEP1 Supply (Chad Demo) _ 🗆 🗙
<u>File Edit Search View Reports Help</u>		
Chicago Judicial Center		View Current Order Modify Customer Info Customer Status Customer WebSite Exit
Main Customer Notes Credit Pending Orders Open Invoices	Ledger Histor	aru   Invoice History   Bebate Contracte   CPM Contract Prices   CPM Policies
Bill To: Chicago Judicial Center	Account#:	CHICAG300 Order Ship To: Chicago Judicial Center
Bill Address 1: 8048 S. Exchange Ave	Salesman: V	WALLY Shin Address 1: 8048 S. Exchange Ave
Bill Address 2: Suite 3343 City State Zin: Chicago II 60617	Frice Upt: 0	
Contact: Bobby Davis		Add Item to Order
Telephone: 312-734-1233	Route/Day	
FAX: 312-734-1234	Larrier	Item: Shine Glass Clini -ConcentrateD Code: SH-020-C
Terms: Net 45		lype: I
Resale #: III 26-0799-87	Sales Class: 4	IL Stock Info
Contact Maxine (ex 201)	Calc Class:	Stock Level: 3 Price Quantity
with any credit issues	1arket Group: 🕻	Beachingth 0 Patrix 26
Current Order Summaru: 1 Lines \$22.77 Total		De Upert: 2 Price History
	1	Bererved: 1 Brith: 21 0
Customer_Froducts   Due for ReUrder   Inventory Items   Sale Items		$\mathbf{A} \mathbf{vailable:}  2  \mathbf{B} \mathbf{k} \mathbf{t} 5 1938 0  \mathbf{s} = 0 1$
ItemCode TC CPDescription C	CurrentPrice	Bikk 6: 18 0 back loss 0
A05113 I C Bulldog Loop Mop,Large	6.37	On Order? N Brkt 7: 16.8 0 on Stock (N)
A430120 I B Go Go Blue Blend Mop,20oz	3.50	Expected: Brkt 8: 15.75 0 abor Items (L)
A/U412 I C Stallion Mop Handle	11.83	Qty On Order:
D2C24 I B Deimer Concentrate	14.69	View All Warehouse Stocks Sale? N 31-Dec-99 Tachines (M)
EG 7570L 20000 L C 2" Caster w/ Insert	5.50	Quantity 1 Stock Unit: Gal
JZ3349 I A Stainless Steel Cleaner	4 20	Down Price Unit: Gal
M116 I D 60" Snap on handle	12.59	Price: 25.20 Uptions
PT20112 I B 1 Ply Jumbo Tissue	33.10	Price Opt: d10 Change Price Opt1 Charge Sales Tax? temCode
RA008 I A Disinfectant Spray	3.91	ype/CPDesc
RH101 I B Big Pink Lotion Soap	7.59	Une-Time Price ? ype/itemLode
S434822K I B 56 Gal. Hi-D 22 MIC Liners	28.28	View Online Catalog Page   OK Cancel   ubCat/ItemCode
SH-020-C I A Shine Glass Clnr -ConcentrateD	25.20	
SN082433 I B 16 Gal. Hi-D 8 MIC Liners	24.46	
TRODADAD	64.59	B5 CProd 64.59 16-Sep-2012 1 10-HANDZ
1 B224348 1 A 56 Gal. HHD 22 MIU Liners	25.09	B7 UProd 20.03 1-5ep-2013 2/20-LH/0H Items Due for ReOrder
	1.44	S CHOU STOULISHNOV-2014 1 SS-SPECE
<		> 54 CProds
Connected to Server		STEP1 Software v7.3526 CMS

Now that we have a couple items added to the order, you can see on the left side of your screen just above the Customer Products tab there is a running total of the current order. It is showing 2 Line (2 items) at a total of \$47.97.

Chicago Judicial Center	Vi	ew Current Order   Modify Custor	mer Info   Customer Status	Customer WebSite Exit		
Main Customer Notes Credit Pending Orders Open Invoice	s   <u>L</u> edger History   Invoice <u>H</u> ist	ory Rebate Contracts CPM Cont	ract Prices CPM Policies			
Bill To: Chicago Judicial Center Bill Address 1: 8048 S. Exchange Ave	Account#: CHICAG300 Salesman: WALLY	Order Ship To: Chicago	Judicial Center			
Bill Address 2: Suite 3349	Price Opt: d10	Ship Address 1: 8048 S. E	3048 S. Exchange Ave			
Lity,State,Zip: Lhicago IL 60617		Ship Address 2: Suite 334	Э			
Telephone: 312-734-1233	Route/Day Chgo/Tue	City,State,Zip: Chicago	IL 60617	7		
FAX: 312-734-1234	Camer Truck 2	Ship Attention:				
Besale #: III 26-0799-87		Sales Tax? Y	Corp Acet: JUDICAL			
Comments: Always call before shipping	Sales Class: A	Tax Freight? N	Corp Dept: C-JUD			
Contact Maxine (ex 201)	Calc Class: <b>B</b>	Charge Freight? Y	Pmt Group:			
with any credit issues	Market Group: GOVT	arket Group: GOVT AgeStatus: HId CPM Class: City				
Current Order Summary: 2 Lines \$47.97 Total		Add Item to Order	Item Status Qty	Sold History Price History		
Customer Products Due for ReOrder Inventory Items Sale Item	s					
ItemCode TC CPDescription	CurrentPrice PriceSource	Last Price LastSaleDate Last G	)ty SubCatCode Cus 🔺	Show Item Type(s)		
▶ 01915-12 I A Super Lemon Plus Degreaser 8oz	58.80 d10 Cust	35.00 1-Sep-2013	3 10-AIRFR	Stock Items (I)		
01961 I B Urinal Screen w/Block,Cherry	2.14 d10 Cust	1.73 15-May-2013	24 10-DEODO	I abor Items (I.)		
01ADV-5321 M C Advance BA 5321 Auto Scrubber	7,395.75 d10 Cust		30-FLOOR	✓ Kits (K)		
0420-55 I C Film Free Glass Cleaner	390.57 B6 CProd	390.57 15-May-2013	0 10-GLASS	Machines (M)		

To see the actual order click the View Current Order button at the top of the screen. This new window will open that shows you all the information you'll need while processing this order.

Ÿ			Orde	r Desk * :	STEP1 Sup	oly (Chad Dem	o)			_ [	×
<u>F</u> ile <u>E</u>	dit <u>V</u> iew										
Main Or	rder Desk		Sub	mit Order R	eview Issue	Send Quotation	Send	Order Confirma	ation Save <u>O</u>	rder <u>C</u> ar	ncel Order
Billing	Shipping Order <u>N</u> otes	P <u>r</u> ofit Summar	y V						Order Statu	s New Or	der 🔻
Bill To:	Chicago Judicial Center		F	O Number:			-		Total Weig	iht:	27
	8048 S. Exchange Ave			Salesman:	Wallace Sen	nper		•	Total Cub	es:	0
	Suite 3349		Sale	s Tax Area:	Ilinois			•	Merch Tot	al:	\$47.97
	Chicago	IL 60617	00	der Source:	CMS	Sa	ales Tax	Bate: 6	Taxable Sal Sales T	es: ax:	\$3.85 \$0.23
Billing In	nstructions:		Paum	ent Terms:	Net 45			<b>•</b>			•
Ĩ					Send Invo	pice with Deliverv?					\$0.00
						Auto-Send 0	rder Co	nfirmation To	Freig	ght	\$3.85
									Ppd Depo	isit:	\$0.00
									Total Du	le:	\$52.05
Enterir	ng Order	Enter/As	sign Order #	🔽 Rea	dy To Ship?	🔽 Ready To	Bill?		Item Status	Update O	rder Totals
Pricing	Profi <u>t</u> Detail										
Line	Type ItemCode	#Ordered	#Shipped	# <b>B/O</b> D	escription		Opt	Price	Amount T	ax? Pri 🔺	
1	I RH101	3	3	<b>O</b> B	ig Pink Lotion	Soap	B2	7.59	\$22.77	N	
▶2	I SH-020-C	1	1	<b>0</b> S	hine Glass Clr	nr -ConcentrateD	d10	25.20	\$25.20	N	Edit
											Ins
											Del
											Move
										~	
<										>	
Connect	ted to Server							STEP1 Softv	vare v7.3526	CMS	

For now let's return to the Main Screen, to do this, just click on the Main Order Desk button in the top left corner of this screen. Back on the Main Screen, just to the right of the Customer Products tab is a tab called Due for ReOrder. Click on this tab to see all the items that this customer routinely buys from you and should be ready to buy again. The STEP1 system can keep track of your customers buying patterns which helps you keep your order size up and avoid those 1 item follow up orders because the customer forgot something. Now when your Customer Service people are on the phone taking an order they can be reminding the customer that they should be running out of this or that.

<b>ÿ</b> (	Order Desk * STI	EP1 Supply	y (Chad Demo	)					×
<u>F</u> ile <u>E</u> dit <u>S</u> earch <u>V</u> iew <u>R</u> eports <u>H</u> elp									
Chicago Judicial Center		View	Current Order	Modify Cu	ustomer Info	Customer Status	Customer	WebSite	E <u>x</u> it
Main Customer Notes   Credit   Pending Orders   Open Invoices	Ledger History In	voice <u>H</u> istory	Rebate Contrac	cts CPM (	Contract Price	s CPM Policies			
Bill To: Chicago Judicial Center	Account#: CHIC	AG 300	Order Ship	To: Chica	ago Judicial Ce	enter			
Bill Address 1: 8048 S. Exchange Ave	Salesman: WALL	.Y	Shin Addres	s 1: 8048	S Evchange (	Ave			
Bill Address 2: Suite 3349 City State Zin: Chicago II 60617	Price Upt: <b>alu</b>			• 0. [00+0.		-110			
Contact: Bobby Davis	Route/Day <b>Chao</b> y	17.00	Ship Addres	s 2:   Suite .	3349				
Telephone: 312-734-1233	Carrier Truck	2	City,State,	∠ıp:  Chica;	go	IL  6061	7		
Terms: Net 45			Ship Attent	ion:					
Resale #: III 26-0799-87			Sales T	ax? Y	Corp	Acet: JUDICAL	-		
Comments: Always call before shipping Contact Maxine (ex. 201)	Calc Class: <b>A</b>		Lax Freig Charge Freig	nt? N ht? Y	Lorp Prot 6	Dept: <b>L-JUD</b>			
with any credit issues	farket Group: GOVT		AgeSta	tus: HId	CPM	Class: City			
Current Order Summary: 2 Lines \$47.97 Total			Add Item to (	)rder		Item Status Q	tySold Histo	ory Price f	History
Customer Products Due for ReOrder Inventory Items Sale Items	]								
ItemCode T C Item Description	Current Price	PriceSource	Last Price	Last Qty	Last Sale	Next Sale			~
353 I B Nu-Tra Shine Sealer	32.24	B5 CProd	25.42	2	6-Sep-2012	13-0ct-2012			
06143 I C First Choice Carpet Pre-Spray	14.83	B5 CProd	14.83	2	15-May-2013	3-Sep-2013	_		
RH101 I B Big Pink Lotion Soap	7.59	B2 CProd	7.59	5	21-Jul-2013	10-Sep-2013			
611783 I B Viper/Lite Trac paper bags	11.41	d10 Cust	12.68	3	21-Jun-2013	10-Sep-2013			
RAUU8     I A Disinfectant Spray	3.91	B8 CProd	3.91	0	21-Jul-2013 15-May 2012	11-Sep-2013			
601D L C Germicidal Concentrate Gal	35.57	B5 CProd	35.57	5	21slul-2013	25-Sen-2013			
TB224348 I A 56 Gal. Hi-D 22 MIC Liners	25.09	B7 CProd	25.09	2	1-Sep-2013	27-Sep-2013			
162 I B Pristine II Cleaner/Sealer	52.00	B5 CProd	52.00	4	8-May-2013	3-0ct-2013	1		
SN082433 I B 16 Gal. Hi-D 8 MIC Liners	24.46	B8 CProd	24.46	2	1-Sep-2013	20-0ct-2013			
JZ3349 I A Stainless Steel Cleaner	4.20	B7 CProd	4.20	48	26-Jun-2013	12-Nov-2013			
01915-12 I A Super Lemon Plus Degreaser 8oz	58.80	d10 Cust	35.00	3	1-Sep-2013	21-Nov-2013			
20WHI I A 20" White Polish Pad	21.04	B5 LPro		A	dd Item t	o Order			
5032 I D 32oz Sorav Bottle	0.70	S CPro	In	-+ C		Code: D/			
A70412 I C Stallion Mop Handle	11.83	B6 CPro	item: Disinfecta	nt opray		Lode: nA	1000		
A05113 I C Bulldog Loop Mop,Large	6.37	B3 CPro	<b>□IL Stock In</b>	fo		rice Informati	ion:		
			Stock Level:	:	48		Price Qu	uantity	Ľ
Connected to Server			Shipped	:	0	List:	8.5		
			Received:			lirkt 2:	6.55	0	
A dell's a second for an Units and second second			Beserved		40 D	arkt 4:	0.43 5.08	0	
Adding an item from this column works exactly									
ke before just click on the item to highlight and									
add it to the order. For this example le	add it to the order. For this example let's highlight								
Disinfectant Spray Click the Add Item	to Order		Qty On Order		B	lirkt 8:	3.91	0	
button and abange the quantity to 6 t	hon oligi (		View All Wa	rehouse S	tocks	ale? N	31-D	ec-99	
button and change the quantity to 6, t		ית.	Quantitu: 🖪		<u>U</u>	P Sto	ock Unit: (	Can	
			quantity.		<u>D</u> o	wn Pr	rice Unit: 0	Can	

<u>C</u>ancel

Charge Sales Tax?

<u>0</u>K

Price: 3.91

One-Time Price?

Price Opt: B8 Change Price Opt

⊻iew Online Catalog Page

#### **ORDER DESK**

So far we have only worked with items the customer has purchased before but sometimes they need something new. When this happens there are a couple ways to handle it. The 2 tabs to the right of Due for ReOrder are Item Categories & All Items. Both contain a complete list of your items but they are listed differently. Click on the Item Categories tab and we'll go over that one first. (You can modify this category list to fit your company better if needed, see Pre-Setup Guide) Notice that this is probably very similar to looking at a page in your Price Book. This is perfect for the customer that knows they need a Degreaser, but doesn't know or doesn't care which one they get.

Current Order Summary: 3 Lines	\$71.43 Total					Add Item to Order	Item Status	QtyS	old History Price History
Customer Products Due for ReOrder Inventory I	tems Sale Items	1							
SubCategory Description (DoubleClick to Select)	Code 🔨	Π	ItemCode	Тур	Cls	ItemDescription	ItemExtendedDesc	riç 🔺	
All Inventory Items (2553)			A985	Т	Α	Citrus Cleaner/Deodorizer			Show Item Type(s)
CHEM: Aerosols (21)	10-AEROS		YA005	- I		All Purpose Cleaner			V Stock Items (I)
CHEM: Air Fresheners (31)	10-AIRFR		YA003	1		Baby Powder Spray			Labor Items (L)
CHEM DISPENSER: Air Freshener (3)	10-AIRFZ		YA010	1		Citrus Foaming Cleaner			V Kits (K)
CHEM: All Purpose Cleaners (9)	10-ALLPU		RA008	1	А	Disinfectant Spray			Machines (M)
CHEM: Automotive (4)	10-AUTO		FA004	1		Dust Mop Treatment			Parts (P)
CHEM: Carpet Care (73)	10-CARPE		A859	1		Formula X Gel Stripper			
CHEM: Concentrate (25)	10-CONCE		YA006	1		Furniture Polish			Show Discontinued?
CHEM: Degreasers (25)	10-DEGRE		RA009	1		Germicidal Cleaner			(SalesUlass = X)
CHEM: Deodorizers (36)	10-DEODO		A031	- I	В	Glass Plus Aerosol			
CHEM: Disinfectants (6)	10-DISIN		RA001	1		GlassPlus Window Cleaner			
CHEM: Finish/Clnr/Seal/Strip (74)	10-FLOOR		CA002	- I		Gum Remover			
CHEM: Food Service. (34)	10-FOODS		2900051	T		Intense All Purpose Cleaner			
CHEM: Glass Cleaners (7)	10-GLASS		YA004	1		Island Fresh Spray			
CHEM: Hand Soaps (77)	10-HANDS		A175-20	1		Misty Solvent Based Spot Rmvr.			
CHEM DISPENSER: Hand Soap (30)	10-HANDZ		YA001	T		Orchard Fresh Spray			Befresh Item List
CHEM: Ice Melters (5)	10-ICE	E						<u></u>	
	*	1							1626 Items
Connected to Server						STEP1 Software v7.	3526 CMS		

For the sake of this example double-click on CHEM: Degreasers to see all of the different degreasers we carry. Double-click on Floor Clean to add it to the order.

Current Order Summary: 3 Lines	Current Order Summary:     3 Lines     \$71.43 Total       Add Item to Order     Item Status     QtySold History									
Customer Products Due for ReOrder Inventory I	ems Sale Items									
SubCategory Description (DoubleClick to Select)	Code 🔺	ItemCode	Typ Cls ItemDescription	ItemExtendedDescrip 🔺						
All Inventory Items (2553)		1017022	I FaST Tennant HD Clnr/Deg 665		Show Item Type(s)					
CHEM: Aerosols (21)	10-AEROS	▶ FLCLNCS	Floor Clean		Stock Items (I)					
CHEM: Air Fresheners (31)	10-AIRFR	GREASEGO	I Grease GO		Labor Items (I.)					
CHEM DISPENSER: Air Freshener (3)	10-AIRFZ	GREASEG05	I Grease Go		Kits (K)					
CHEM: All Purpose Cleaners (9)	10-ALLPU	202-05	I GreaseBuster HD Degreaser		Machines (M)					
CHEM: Automotive (4)	10-AUTO	323RTU	I Laser Shot		Parts (P)					
CHEM: Carpet Care (73)	10-CARPE	LOW-FOAM 5	I Low-Foam Floor Clean 5							
CHEM: Concentrate (25)	10-CONCE	LOW-FOAM	I Low-Foam Floor Clean 55		Show Discontinued?					
CHEM: Degreasers (25)	10-DEGRE	20450	I Orange 88 Degreaser		(SalesClass = 'X')					
CHEM: Deodorizers (36)	10-DEODO	354PMGR4	I PM Hi-Power Cleaner/Degreaser							
CHEM: Disinfectants (6)	10-DISIN	1001-01	I Purple Magic Degreaser							
CHEM: Finish/Clnr/Seal/Strip (74)	10-FLOOR	1001-55DRUM	I Purple Magic Degreaser							
CHEM: Food Service. (34)	10-F00DS	1001-05	I Purple Magic Degreaser Pail							
CHEM: Glass Cleaners (7)	10-GLASS	0910	I Speed Clean							
CHEM: Hand Soaps (77)	10-HANDS	0904	I Spray - Away Cleaner							
CHEM DISPENSER: Hand Soap (30)	10-HANDZ	002SC-01	I Super Citrus Plus Degreaser		Refresh Item List					
CHEM: Ice Melters (5)	10-ICE			¥						
	*				25 Items					
Connected to Server			STEP1 Software v7.	3526 CMS						

Now suppose your customer knows exactly what they want but you don't have it setup in your inventory. STEP1 calls this a special item and it is very easy to handle. Lets say the customer needs a Left Handed Broom. What you need to do here instead of adding the item to the order by picking from a list, is add a line to the order and enter it yourself. To do this click the View Current Order button. Position the cursor on the bottom of the list of items already added to the order and use the down arrow to add a line.

<b>W</b>		Order Desk *	STEP1 Supply (Chad Dem	o)		-	□ ×
<u>F</u> ile <u>E</u> dit <u>V</u> iew							
Main Order Desk		Submit Order R	eview Issue Send Quotation	Send Order Confir	mation Save	Order 0	ancel Order
Billing Shipping Order Notes	Profit Summary				Order Chal		
Bill To: Chicago Judicial Center		PO Number:		-	Total We	us   New iabt	Urder <u>V</u>
8048 S. Exchange Ave		Salesman	Wallace Semper	-	Total Cu	bes:	0
Suite 3349		Sales Tay Area	llinois		Merch To	otal:	\$114.87
Chicago	UL [00017	Order Seuree		las Tau Datas C	Taxable S	ales: T	\$47.29
Dilling Instructioner	JIC 100017		CM3 54	sies Laxinate; o	- Sales	i ax:	\$ <u>2.04</u>
billing instructions.		- Payment Lerms:	Net 45	-			\$0.00
		_	Auto-Send F	Irder Confirmation Tr	Fre	eight	\$3.85
1			1. 1.00000100		Ppd Dep	iosit:	\$0.00
					Total D	ue:	\$121.56
Entering Order	Enter/Assign	Order # 🔽 Rea	dy To Ship? 🔽 Ready To	Bill?	Item Statu	s Update	Order Totals
Pricing Profit Detail							
Line Type ItemCode	#Ordered #Sh	ipped #B/OC	escription	Opt Price	Amount	Tax? Pri	^
1 I RH101	3	3 0 8	ig Pink Lotion Soap	B2 7.59	\$22.77	N	
2 I SH-020-C	1	1 0 S	hine Glass Clnr -ConcentrateD	d10 25.20	\$25.20	N	Edit
3 I RA008	6	6 0	isinfectant Spray	B8 3.91	\$23.46	N	Ins
▶ 4 I FLCLNCS	1	1 0 F	loor Clean	d10 43.44	\$43.44	Y	Del
							Move
<						>	
Connected to Server				STEP1 Sot	ftware v7.3526	CM	S

Now on this line you need to fill in the amount Ordered, the amount to be Shipped, how many will be back-ordered and the Description "Left Handed Broom". Once you have all that info entered, the highlight cursor should still be on this line.

*	Order Desk *	STEP1 Supply (Chad Dem	o)	-	. 🗆 🗙
<u>F</u> ile <u>E</u> dit <u>V</u> iew					
Main Order Desk	ation Save Order	Cancel Order			
Billing Shipping Order Notes Profit Summary				Order Status No	u Order 🚽
Bill To: Chicago Judicial Center	PO Number:		Total Weight:	70	
8048 S. Exchange Ave	- Salesman:	Wallace Semper	<b>_</b>	Total Cubes:	Ő
Suite 3349	Sales Tay Area:	Ilinois		Merch Total:	\$164.87
	Sales Tax Alea.		<u> </u>	Taxable Sales:	\$97.29
Chicago  IL  60617	Urder Source:	LMS Sa	lles Tax Rate: 6	Sales Tax:	\$5.84
Billing Instructions:	Payment Terms:	Net 45	-	lr	
		Send Invoice with Delivery?			\$0.00
		🔽 Auto-Send O	rder Confirmation To	Preight Preight	\$3.0J \$0.00
				Total Duce	\$0.00
	1				\$174.30
Entering Order Enter/Assign (	Order # 🔽 Rea	dy To Ship? 🔽 Ready To	Bill?	Item Status Upda	ite Order Totals
Pricing Profit Detail					
Line Type ItemCode #Ordered #Shi	pped #B/OD	escription	Opt Price	Amount Tax? F	Pri 🔺
1 I RH101 3	3 O B	ig Pink Lotion Soap	B2 7.59	\$22.77 N	
2 I SH-020-C 1	1 O S	hine Glass Clnr -ConcentrateD	d10 25.20	\$25.20 N	Edit
3 I RA008 6	6 O D	lisinfectant Spray	B8 3.91	\$23.46 N	Ins
4 I FLCLNCS 1	1 O F	loor Clean	d10 <b>43.44</b>	\$43.44 Y	Del
▶ 5 S 2	2 0 📘	eft Handed Broom	S 25.00	\$50.00 Y	
					Movel
					To
					· · · · ·
					~
<				:	>
Connected to Server			STEP1 Softv	vare v7.3526 C	MS

Click the Edit button on the right to enter some more information on this item. In this new window you will see that vendor is blank as well as both price and cost. If you know which vendor you will be ordering this item from you would go ahead and enter it here. If not, leave it blank. Enter a price in the Unit Price (S) field if you know it. If not leave it blank. If this is a going to be a one time price check the box just below the price. Enter a cost (if you know it) in the G/L Ave Cost field. If you don't know the cost yet, just leave this blank as well. Once this Item is purchased by you from which ever vendor you decide to use, the cost will flow back to this order and be entered for you. On Special Items like this you have to go to this Edit Screen and set the price, STEP1 will not do this automatically.

	Modify Special Line					
<u>F</u> ile <u>H</u> elp						
Description: Left Handed Broom		Order Number:				
Number Ordered: 1	Line Number: Line Tupe: S					
Number Shipped: 1		сте туре. Э				
Number B/O: 0						
Unit Price (S): 25.00 Sy	vstem Price (SII): 0.00					
One-Time Price?						
Ship Wgt/unit: 0		Item Information				
Sub-Cat: Special Order Items		Item Code:				
Supplier: Lagasse Bros. Inc.		Price Unit: Each				
Supplier Part Number:		Price Mult: 1				
Cost Information	Allow Auto Cost Update2 🔽	Hazard Information				
Comm Cost: <b>10.60</b>	Rebate?	MSDS Required?				
G/L Ave Cost: 10.00	Rebate Cost:	Hazardous2				
Pub Cost %: 6	Std Cost: 0.00	HazMat Code:				
G/L Interface Dept Major	Sub	Calas Tav2				
Sales 4100	V V	Commission Line?				
Cost of Sales 5200		Print On Invoice?				
Inventory 1200		Bid Line?				

While your still looking at the View Current Order Screen let's go over a few things that you'll need to be filling out.

On the left is the Billing information that you setup in the customer record, along with billing instructions.

Enter a PO Number by typing it into this line. If this is a customer that requires a PO# you won't be able to save the order with this field empty.

	Order	Desk * STEP1 Sup	oly (Cha	d Demo	o)			-		×
	Subr	nit Order Review Issue	Send Qu	otation	Send	Order Confirma	tion Save (	<u>)</u> rder	<u>C</u> ancel (	Drder
Profit Summary							Order Stat	is Nei	w Order	Ţ
	P	0 Number:					Total Wei	ght:	n oldei	70
		Salesman: Wallace Ser	nper			-	Total Cut	bes:		0
	Sales	Tax Area: Ilinois				•	Merch To	tal:	\$16 #0	64.87
IL 60617	Ord	ler Source: CMS		Sa	les Tax	Rate: 6	Sales 1	ax:	ъс \$	5.84
	Paym	ent Terms: Net 45				-				
		, Send Invo	bice with De	elivery?					\$	\$0.00
			🔽 Auto	-Send Or	rder Cor	nfirmation To	Fre	ight	\$	3.85
							Ppd Dep	osit:	\$	\$0.00
							l otal D	ue:	\$17	4.56
Enter/Assign 0	rder #	Ready To Ship?	🗹 Rea	ady To	Bill?		Item Status	Upda	te Order 1	Totals
#Ordered #Ship	ped	<b>#B/O</b> Description			Opt	Price	Amount	Tax?	'ri 🔺	
3	3	0 Big Pink Lotion	Soap		B2	7.59	\$22.77	Ν		
1	1	0 Shine Glass Clr	ir -Concenti	rateD	d10	25.20	\$25.20	N	E	dit
6	6	0 Disinfectant Sp	ray		B8	3.91	\$23.46	N	I	Ins
1	1	U Floor Clean			d10	43.44	\$43.44	Y	- C	Del
2	2	U Lert Handed Br	oom		5	25.00	\$50.00	Υ		
									м	love
										To
									> ·	
						STEP1 Softw	are v7.3526	C	MS	
	Profit Summary IL 60617 Enter/Assign 0 #0rdered #Ship 3 1 6 1 1 2 2	Profit Summary	Submit Order Neview Issue         Profit Summary         Profit Summary         Profit Summary         Pol Number:         Salesman:         S	Submit Order Review Issue       Send Qu         Profit Summary       PO Number:         Profit Summary       PO Number:         Salesman:       Wallace Semper         Sales Tax Area:       Ilinois         IL       60617       Order Source:         Payment Terms:       Net 45         Sales Tax Area:       Send Invoice with D         Payment Terms:       Send Invoice with D         Y       Payment Terms:       Send Invoice with D	Order Desk * STEP1 Supply (Cha d Dema         Submit Order Review Issue       Send Qu otation         Profit Summary       PO Number:         Salesman:       Vallace Semper         Sales Tax Area:       Ilinois         IL       60617       Order Source:         Order Source:       CMS       Sa         Payment Terms:       Net 45       Send Invoice with Delivery?         Value-Send Order       Send Invoice with Delivery?       Value-Send Order         Enter/Assign Order       Value       Send Invoice with Delivery?         Value       Value       Value         Value<	Order Desk * STEP1 Supply (Cha d Demo)         Submit Order Review Issue       Send Q otation       Send         Profit Summary       PO Number:       Image: Comparison of Comp	Submit Order Review Issue Send Qt otation Send Order Confirma   Pgofit Summary PO Number: Image: Confirmation Send Order Confirmation Send Order Confirmation Seles Tax Area   Sales Tax Area Ilinois Image: Confirmation Seles Tax Rate: 6   Payment Terms: Net 45 Image: Confirmation To   IL 60617 Order Source: CMS Sales Tax Rate: 6   Payment Terms: Net 45 Image: Confirmation To   Image: Confirmation To Image: Confirmation To   Image:	Order Desk * STEP1 Supply (Cha d Demo)         Submit Order Review Issue       Send Quotation       Send Order Confirmation       Save C         Profit Summary       PO Number:       Image: Construction of the confirmation       Save C         Sales Tax Area       Ilinois       Image: Construction of the confirmation       Save C         Sales Tax Area       Ilinois       Image: Construction of the confirmation of the confirmat	Order Desk * STEP1 Supply (Chad Demo)         Submit Order Review Issue       Send Quotation       Send Order Confirmation       Save Quoter         Pofit Summary       PO Number       Image: Salesmark       Vallace Semper       Image: Salesmark       Image:	Order Desk * STEP1 Supply (Che d Demo)       -       □         Submit Order Review Issue       Send Qu otation       Send Order Confirmation       Save Quder       Cancel I         Profit Summary       PO Number:

The Options in this middle section were all setup in the customer record but can be changed, if needed, from here. Except for Order Source, this helps when someone has a question about this order. It makes it easy to find out who submitted the order. On the right side of the screen towards the top there is a drop box for Order Status. This allows you to save this order in many different ways.

(Quote, Future Order, Rush, Dropship, etc...)

Then your totals for this order are located here as well.

This Update Order Totals button does exactly that, it updates the totals so you can see them here on screen. These updates happen whether you click this button or not, but sometimes its nice to be able to see the real numbers before you save out the order.

Ÿ						Orde	r Desk *	STEP1 Supp	oly (Chad Dem	o)				-		1 × 1
<u>F</u> ile	Ec	dit <u>\</u>	<u>/</u> iew													
Mai	n Oro	der De	esk			Sub	omit Order F	eview Issue	Send Quotation	Send	Order Confirma	ition S	Gave <u>(</u>	<u>]</u> rder	<u>C</u> an	cel Order
Billin		Shipp	oing Order <u>N</u> otes	P <u>r</u> of	it Summar	ry						Orde	r Stat			ter v
Bill	To:	Chica	ago Judicial Center	1		F	PO Number	:		_		To	tal Wei	as price iaht:	wen	70
	Í	8048	S. Exchange Ave				Salesman	: Wallace Sem	iper		•	T	otal Cu	bes:		0
	ĺ	Suite	3349			Sale	s Tax Area	: Ilinois			-	Mer	ch To	tal:		\$164.87
	Í	Chica	go	IL	60617	Or	der Source	CMS	Sa	ales Tax	Rate: 6		Sales i	nes. Tax:		\$5.84
Billir	ng In:	structi	ons:	,	,	Payr	nent Terms:	Net 45			•	<u> </u>				
	Γ							, Send Invo	ice with Delivery?							\$0.00
	Γ								🔽 Auto-Send O	rder Cor	nfirmation To	<sub>B</sub>	Fre Fre	ight	_	\$3.85
													otal D	ue.		\$0.00
					E alta a da a					D.110				uc.		des Tetels
Ent	erin	g Vra	1er		Enter/As	ssign Urder #	ј № неа	iay to ship?	✓ Heady To	BIII?		Item	status	Upda	ite Ur	der i otais
Elic		Profi <u>t</u>	Detail	1						1- 1				[		-
	Line	Туре	ItemCode	#0	)rdered c	#Shipped	#B/O [	Description	C	Opt	Price	An An	ount	Tax? F	<u>ri</u> ^	
-	2	1	SH-020-C		3 1	3	0	Shine Glass Cln	soap r -ConcentrateD	d10	25 20	ر ج	2.77	N	-	Edit
	3	, I	RA008		6	6	0	Disinfectant Spi	rav	B8	3.91	\$	3.46	N	-	Ins
	4	I	FLCLNCS		1	1	0 F	loor Clean		d10	43.44	\$	3.44	Y		
	5	S			2	2	0	.eft Handed Bri	oom	S	25.00	\$	0.00	Y		
																Move To
<														3	>	
Conr	necto	ed to	Server								STEP1 Softw	/are v7	3526	С	MS	
										,				,		

The Item Status button opens up a new window that allows you to view any item (Either from the item lists or from your current order items) and all the information that you have on it. Costing, Pricing, Stock levels, Pending Orders and much more. Highlight one of the stock itemsClick on this button and let's go through some of this.

12

In the Main tab you will see information such as: Item Cost along with the last time it was changed, Supplier Info and supplier part numbers, Stock levels & Bracket Pricing.

File       Search         Marc       WgbDocs       WH Info       Pending Orders       Stock History       Item Notes       Price List Notes       CycleCount History         Description:       Big Pink Lotion Soap       Stock Level       20         Item Code:       BH101       Beceived:       0         Item Type:       Stock Con-Hand:       20         Sales Class:       Beceived:       0         Stock Unit:       Gal       Price Unit:       Price Unit:         Price Mult:       1       Stock Con-Hand:       20         Ship Veight:       9       Stock Unit:       0         Ship Veight:       9       Date:       Expected:         Ship Veight:       9       MSDS Reqd? N       List:       8.91         Last Cost Chg:       16-May-2013       MSDS Reqd? N       Brikt 2:       7.59       0         Supplie:       GOJ0110       Service Item? N       Brikt 4:       6.81       0         Supplie: 0       Alt Supplie: 0       Brikt 4:       6.61       0         Alt Supp Part #:       Route/Day       Brikt 6:       6.21       0         BreakCase? N       1 From:       Taxable? Y       S/N? N       Brikt 8: <t< th=""><th>🐺 🛛 Item Stat</th><th>us Check * Big Pink Lotion Soa</th><th>р</th><th>-</th><th>□ ×</th></t<>	🐺 🛛 Item Stat	us Check * Big Pink Lotion Soa	р	-	□ ×
WebDocs       WH Info       Pending Orders       Stock History       Item Notes       Price List Notes       CycleCount History         Description: Big Pink Lotion Soap       Stock Levet       20       Shipped:       0         Item Code: RH101       Stock Con-Hand:       20       Received:       0         Item Type: I       Stock Con-Hand:       20       Reserved:       0         Sales Class: B       Stock Unit: Gal       On Order? N       Date:       20         Sub-Cat: 10-HANDS       Stock Unit: Gal       On Order? N       Date:       20         Stock Unit: Gal       On Order? N       Date:       20         Price Mult:       1       Stop Class:       On Order? N       Date:         Ship Weight:       9       Gy: 0       O       0         Ship Cubes:       0       View Online Catalog Page       Price       Qty: 0         Item Cost:       3.56       MSDS Reqd? N       Brikt 2:       7.59       0         Supplie: G0J0110       Service Item? N       Brikt 3:       7.13       0         Supplie: O       Alt Supplie: 0       Route/Day       Brikt 4:       6.61       0         Alt Supplie: O       ReakCase? N       1 From:       Taxable? Y <td><u>File</u> <u>Search</u></td> <td></td> <td></td> <td></td> <td></td>	<u>File</u> <u>Search</u>				
Description: Big Pink Lotion Soap       Stock Levet:       20         Item Code: RH101       Shipped:       0         Item Type: I       Stock On-Hand:       20         Sales Class: B       Stock Class::       0         Stock Class: -       Stock Class::       20         Stock Unit: Gal       On Order? N       Date:         Price Unit: Gal       Date:       Expected:         Price Mult:       1       Date:       Expected:         Ship Weight:       9       MSDS Reqd? N       Brkt 2:       7.59         Ship Cubes:       0       View Online Catalog Page       Price       Quantity         Item Cost:       3.56       MSDS Reqd? N       Brkt 2:       7.59       0         Supplier: GOJ0110       Service Item? N       Brkt 2:       7.59       0         Supplier: GOJ0110       Service Item? N       Brkt 3:       7.13       0         Alt Supplier: 0       Route/Day       Brkt 6:       6.21       0         Alt Supplier: 0       Route/Day       Brkt 8:       5.26       0         BreakCase? N       1       Trom:       Taxable? Y       S/N? N       Brkt 8:       5.26       0         BreakCase? N       1	Main WebDocs WH Info Pending Orders Stock Histor	ry   Item <u>N</u> otes   Price <u>L</u> ist Notes   Cycl	eCount History		
Simpletables:         B         Price         Quantity           Item Cost:         3.56         MSDS Reqd? N         List:         8.91           Last Cost Chg:         16-May-2013         MSDS Code:         Brkt 2:         7.59         0           Supplier:         60J0110         Service Item? N         Brkt 3:         7.13         0           Supplier: 0         Alt Supplier: 0         Brkt 4:         6.81         0           Alt Supplier: 0         Route/Day         Brkt 6:         6.21         0           BreakCase? N         1 From:         Taxable? Y         S/N? N         Brkt 8:         5.26         0           Comments: For Use with Pour in Soap Dispensers; Impact # 9330 / 9336 / 4020         To         To         To	Description: Big Pink Lotion Soap  Item Code: RH101 Item Type: I Sales Class: B Stock Class: - Sub-Cat: 10-HANDS Stock Unit: Gal Price Unit: Gal Price Mult: 1 Ship Weight: 9 Sbip Cubes: 0 View Dnline Cat	alon Page	Stock Level: Shipped: Received: Stock On-Hand: Reserved: Available: On Order? <b>N</b> Date: Expected: Qty: <b>0</b>	20 0 20 0 20	
Supplier:         G0J0110         HazMat? N         Brkt 3:         7.13         0           Supplier Part #:         RH101         Brkt 4:         6.81         0           Alt Supplier:         0         Brkt 5:         6.67         0           Alt Supplier:         0         Brkt 6:         6.21         0           Alt Supplier:         0         Brkt 7:         5.66         0           BreakCase? N         1 From:         Taxable? Y         S/N? N         Brkt 8:         5.26         0           Comments:         For Use with Pour in Soap Dispensers; Impact # 9330 / 9336 / 4020         Sole? N         To         To	Item Cost: 3.56 Last Cost Chg: 16-May-2013	MSDS Reqd? N MSDS Code:	Price List: <b>8.91</b> Brkt 2: <b>7.59</b>	Quantity 0	
BreakCase? N     1 From:     Taxable? Y     S/N? N     Brkt 8:     5.06     0       Comments: For Use with Pour in Soap Dispensers; Impact # 9330 / 9336 / 4020     S/N? N     Brkt 8:     5.26     0	Supplier: <b>G0J0110</b> Supplier Part #: <b>RH101</b> Alt Supplier: <b>0</b> Alt Supp Part #:	HazMat/N Service Item?N Warranty:0 Route/Day	Brkt 3:         7.13           Brkt 4:         6.81           Brkt 5:         6.67           Brkt 6:         6.21           Brkt 7:         5.66	0 0 0 0	
Comments: For Use with Pour in Soap Dispensers; Impact # 9330 / 9336 / 4020 To	BreakCase? N 1 From:	Taxable? Y S/N? N	Brkt 8: 5.26	0	
	Comments: For Use with Pour in Soap Dispensers; Impact # 9330 / 9336 / 4020		Sale? N To		

In the WebDoc tab, if this were a Web Catalog Item would show you a spec list on this item along with a picture of the item on the right.

💗 Item Status Check * Big Pink Lotion Soap	-	×
File Search		
Main WebDocs WH Info Pending Orders Stock History Item Notes Price List Notes CycleCount History		
Big Pink Lotion Soap		
Item Code: RH101		
For Use with Pour in Soap Dispensers; Impact # 9330 / 9336 / 4020		
View/Print Product Brochure		

In the W/H Stock tab you will find stock levels within each of your warehouses along with availability info.

<u>F</u> ile <u>S</u> earch										
Main WebDocs WHING Pending Orders Stock History Item Notes Price List Notes CycleCount History										
Item Description: Big Pink Lotion Soap Stock Level:										
Shipped: Beautived:										
Item Code: RH101 Received: Stock On-Hand:										
Sales Class: B Reserved:	0									
Stock Unit: Gal Purchase Unit: Case Purchase Mult: 4 Available:	20									
WH Stock WH Qty History WH Sales History										
Branch Warehouse BinNumber Stock Shipped Received OnHand Reserved Available OnOrder? Quantity Expected	1    E									
CHICAGO IL 1-HD 20 0 0 20 0 20 N 0										
The Will One and Will College to be a filled on the College College (AV) as being	-									
The WH Uty and WH Sales tabs will show History for the Selected Warehouse.										

The Pending Orders tab shows you any Pending Orders that have this item included.

Ÿ			Item Sta	tus Check '	* Big Pink L	otion !	Soap			-	□ ×
<u>F</u> ile	<u>S</u> earch										
<u>M</u> ain	│W <u>e</u> bDocs│ <u>W</u> H Info	Pending Orders	Stock <u>H</u> isto	ory Item <u>N</u> ote	es   Price <u>L</u> ist N	lotes	CycleCount	History			1
#0	rdered Customer Name		Order Date	Target Ship	Status	Ready	TruckRun	WHCode	Order #	Туре Ме	rch Tot
P											
											×
		Show Cr	aditHold Order			<b>6</b>	с I.IT				
	/iew Order	Show On	Hold Orders	>		To So	<b>Search/I</b> rt. Search o	otal: r Total a Co	olumn. Riaht	-click on th	e column.
		Show Dr.	opShip Orders Iotations								

The Stock History tab shows any adjustments to the stock level of this item and why the levels changed.

Ģ			ltem	Status Check	* Big Pink Lo	tion Soap			_ □	х
Ei	le <u>S</u> earch									
M	ain W <u>e</u> bDo	ics   <u>W</u> H Inf	Pending <u>O</u> rders Stock	History   Item <u>N</u> o	tes   Price <u>L</u> ist N	otes Cycle(	Cour	t History		
Γ	Date	W/H Code	Description	Туре	Invoice/PO#	StockQty	Bid	Account		^
Γ	26-May-2013	IL	Cust: FOUND100; Invo: 11	1028 IN	111028	1	Ν	FOUND100		
	29-May-2013	IL	Cust: MARCU100; Invo: 11	11143 CS	111143	4	Ν	MARCU100		
Г	31-May-2013	IL	Cust: 3039; Invc: 111052	CS	111052	2	Ν	3039		
	31-May-2013	IL	Cust: 4425; Invc: 111091	IN	111091	16	Ν	4425		
	7-Jun-2013	IL	Purchase Order: 11718	PO	11718	40		GOJ0110		
	8-Jun-2013	IL	Cust: 3039; Invc: 111052-1	CS	111052-1	2	Ν	3039		
Г	14-Jun-2013	IL	Cust: PLEDG100; Invo: 11	0181 IN	110181	1	Ν	PLEDG100		
	14-Jun-2013	IL	Cust: 4443; Invc: 111250	CS	111250	2	Ν	4443		
Г	28-Jun-2013	IL	Cust: APOST100; Invo: 11	1701 IN	111701	1	Ν	APOST100		
	30-Jun-2013	IL	Cust: 4086; Invc: 111736	IN	111736	2	Ν	4086		
	21-Jul-2013	IL	Cust: CHICAG300; Invo: 11	12155 IN	112155	5	Ν	CHICAG300		
	26-Jul-2013	IL	Adjust Item Stock Level	AD		-4				
	26-Jul-2013	IL	Adjust Item Stock Level	AD		4				
Γ	27-Jul-2013	IL	Cust: 4658; Invc: 112285	IN	112285	4	Ν	4658		
Γ	7-Aug-2013	IL	Cust: 4086; Invc: 112437	IN	112437	3	Ν	4086		
Þ	10-Aug-2013	IL	Cust: 2423; Invc: 112570	CS	112570	1	Ν	2423		
Γ									4	~
	View Invoice/P0       Toggle Bid-Flag       Show Sales (and Credits)       Sort/Search/Total:         View Invoice/P0       Toggle Bid-Flag       Show Purchases       To Sort, Search or Total a Column,         Print/SaveToFile       Show Stock Adjustments       Show Stock Adjustments       Right-click on the column.									

The Item Notes tab shows the open text block filled in when setting up the item. Contains any info that you might need to know when working in this item's record.

۳	Item Status Check * Big Pink Lotion Soap - 🗖 🗙
<u>F</u> ile	Search
<u>M</u> ain	WebDocs WH Info Pending Orders Stock History Item Notes Price List Notes CycleCount History

Now Close the Item Status window (you should still be in the View Current Order Screen) and click on the Shipping tab. (It's located in the top left corner next to the Billing tab)

On the Left side of the screen is the Ship-To information and Shipping Instructions. All of these fields can be edited from here and changes will only apply to this order. They will not be saved to the Customer's record.

<b>W</b>	Order Desk * STEP1 Supply (Chad Demo)	_ 🗆 🗙
<u>F</u> ile <u>E</u> dit <u>V</u> iew		
Main Order Desk	Submit Order Review Issue Send Quotation Send Order Confi	mation Save <u>O</u> rder <u>C</u> ancel Order
Billing Shipping Order Notes Profit Summary		Order Status New Order
ShipTo: Chicago Judicial Center	Warehouse: IL	Total Weight: 70
8048 S. Exchange Ave	Order Date: 1-Oct-2014	Total Cubes: 0
Suite 3349	Ship Date:	Merch Total: \$139.87
Chicago IL 60617		Sales Tax: \$4.34
Attn:	Frt Ppd/Col: P	
Instrux:	Delivery Route: Local Chicao & Vacinity	\$0.00
	Carrier: Best Way	Freight \$3.85 Pod Deposit \$0.00
	FOR CHILDREN	- 1 μα D'eposic. \$0.00
	FUB: Ship Point	Total Due: \$148.06
Enter/Accien	Prost Jonip Point	Total Due: \$148.06
Entering Order Enter/Assign	Drder # Ready To Ship?  Ready To Bill?	Total Due:         \$148.06           Item Status         Update Order Totals
Entering Order Enter/Assign Pricing Profit Detail Units Turnel HenrCade Http://www.cade.com/	Drder # VO Desseriation	Total Due: \$148.06
Entering Order Enter/Assign Pricing Profit Detail Line Type ItemCode #Ordered #Sh 1 L BH101 3	POB: Isnip Point         Drder #       Image: I	Total Due:     \$148.06       Item Status     Update Order Totals       Amount     Tax? Pri       \$22.77     N
Entering Order Enter/Assign Pricing Profit Detail Line Type ItemCode #Ordered #Sh 1 I RH101 3 2 I SH-020-C 1	PUB: Isnip Point         Order #       Image: Ready To Ship?       Image: Ready To Bill?         Image: Public Price       Image: Ready To Bill?         Image: Public Price       Image: Public Price         Image: Public Price       Image: Public Price     <	Total Due:     \$148.06       Item Status     Update Order Totals       Amount     Tax? Pri       \$22.77     N       \$25.20     N
Entering Order         Enter/Assign           Pricing         Profit Detail           Line         Type         ItemCode         #Ordered         #Sh           1         I         RH101         3         3           2         I         SH-020-C         1         3         1           3         I         RA008         6         6	Poils: Isrip Point       Ready To Ship?       Ready To Bill?         Pped       #B/O       Description       Opt       Price         3       0       Big Pink Lotion Soar       B2       7.53         1       0       Shine Glass ChrConcentrateD       d10       25.24         6       0       Disinfectant Spray       B8       3.91	Total Due:     \$148.06       Item Status     Update Order Totals       Amount     Tax? Pri       \$22.77     N       \$25.20     N       \$23.46     N
Entering Order       Enter/Assign         Pricing       Profit Detail         Line       Type         1       I         Profit       Detail         1       I         1       I         1       I         2       I         3       I         A008       6         4       I         FLCLNCS       1	PDB: Isnip Point       Ready To Ship?       Ready To Bill?         pped       #B/0       Description       Opt       Price         3       0       Big Pink Lotion Soar       B2       7.53         1       0       Shine Glass Clnr-ConcentrateD       d10       25.20         6       0       Disinfectant Spray       B8       3.91         1       0       Floor Clean       d10       43.44	Total Due:         \$148.06           Item Status         Update Order Totals           Amount         Tax?           \$22.77         N           \$22.77         N           \$25.20         N           \$23.46         N           \$43.44         Y
Entering Order         Enter/Assign           Pricing         Profit Detail           Line         Type         ItemCode         #Ordered         #Sh           1         I         RH101         3         3           2         I         SH-020-C         1         4           3         I         RA008         6         4           4         I         FLCLNCS         1         1	PUB: Isnip Point       Ready To Ship?       Ready To Bill?         Image: Provide the structure of t	Total Due:         \$148.06           Item Status         Update Order Totals           Amount         Tax? Pri           \$22.77         N           \$22.77         N           \$22.70         N           \$22.70         N           \$23.46         N           \$43.44         Y           \$25.00         Y
Entering Order         Enter/Assign           Pricing         Profit Detail           Line         Type         ItemCode         #Ordered         #Sh           1         I         RH101         3         3           2         I         SH-020-C         1         3         6           3         I         RA008         6         4         1         FLCLNCS         1           5         S         1         1         5         1         1	PDB: Isnip Point       Ready To Ship?       Ready To Bill?         pped       #B/O       Description       Opt       Price         3       0       Big Pink Lotion Soar       B2       7.55         1       0       Shine Glass Clnr -ConcentrateD       d10       25.20         6       0       Disinfectant Spray       B8       3.91         1       0       Floor Clean       d10       43.44         1       0       Left Handed Broom       S       25.00	Total Due:         \$148.06           Item Status         Update Order Totals           Amount         Tax?           \$22.77         N           \$22.77         N           \$22.77         N           \$22.77         N           \$22.70         N           \$22.77         N           \$22.77         N           \$22.77         N           \$22.77         N           \$22.77         N           \$22.70         N           \$22.00         N           \$25.00         Y           Move
Entering Order       Enter/Assign         Pricing       Profit Detail         Line       Type       ItemCode       #Ordered       #Sh         1       I       RH101       3       3         2       I       SH-020-C       1       1         3       I       RA008       6       4         4       I       FLCLNCS       1       1         5       S       1       1	PUB: Isnip Point       Ready To Ship?       Ready To Bill?         inder #       ✓       Ready To Ship?       ✓         inder #       ✓       Ready To Bill?       ✓         inder #       Ø       Description       Opt       Price         inder #       Ø       Big Pink Lotion Soar       B2       7.53         inder Ø       Shine Glass Clint - ConcentrateD       d10       25.20         inder Ø       Floor Clean       d10       43.44         inder Ø       Left Handed Broom       S       25.00	Total Due:         \$148.06           Item Status         Update Order Totals           Amount         Tax? Pri           \$22.77         N           \$22.77         N           \$22.70         N           \$22.70         N           \$22.70         N           \$22.00         N           \$23.46         N           \$25.00         Y           Move         To
Entering Order         Enter/Assign           Pricing         Profit Detail           Line         Type ItemCode         #Ordered         #Sh           1         I         RH101         3         3           2         I         SH-020-C         1         3         6           3         I         RA008         6         4         I         FLCLNCS         1           5         S         1          1          1	PUB: Isnip Point       Ready To Ship?       Ready To Bill?         Image: Point Price       Price         Image: Point Price       Price <td>Total Due:     \$148.06       Item Status     Update Order Totals       Amount     Tax?       \$22.77     N       \$22.77     N       \$22.77     N       \$22.70     N       \$22.70     N       \$22.70     N       \$22.70     N       \$22.70     N       \$22.77     N       \$22.70     N       \$22.70     N       \$22.00     N       \$25.00     Y         Move       To</td>	Total Due:     \$148.06       Item Status     Update Order Totals       Amount     Tax?       \$22.77     N       \$22.77     N       \$22.77     N       \$22.70     N       \$22.70     N       \$22.70     N       \$22.70     N       \$22.70     N       \$22.77     N       \$22.70     N       \$22.70     N       \$22.00     N       \$25.00     Y         Move       To
Entering Order         Enter/Assign           Profit Detail	PUB: Isnip Point       Ready To Ship?       Ready To Bill?         Pped       #B/0       Description       Opt       Price         3       0       Big Pink Lotion Soar       B2       7.53         1       0       Shine Glass Clnr -ConcentrateD       d10       25.21         6       0       Disinfectant Spray       B8       3.91         1       0       Floor Clean       d10       43.44         1       0       Left Handed Broom       S       25.00	Total Due:     \$148.06       Item Status     Update Order Totals       Amount     Tax?       \$22.77     N       \$22.77     N       \$22.70     N       \$22.77     N       \$22.70     N       \$22.70     N       \$22.77     N       \$22.77     N       \$22.70     N       \$22.00     N       \$23.46     N       \$25.00     Y       Move     To
Entering Order         Enter/Assign           Pricing         Profit Detail           Line         Type         ItemCode         #Ordered         #Sh           1         I         RH101         3         3           2         I         SH-020-C         1         3         6           3         I         RA008         6         4         1         FLCLNCS         1           5         S         1         1         5         1         5	PUB: Isnip Point       Ready To Ship?       Ready To Bill?         Image: Point Point       Opt       Price         3       0       Big Pink Lotion Soar       B2       7.53         1       0       Shine Glass Chr - ConcentrateD       d10       25.20         6       0       Disinfectant Spray       B8       3.91         1       0       Floor Clean       d10       43.44         1       0       Left Handed Broom       S       25.00	Total Due:     \$148.06       Item Status     Update Order Totals       Amount Tax? Pri        \$22.77 N        \$22.77 N        \$22.70 N        \$22.70 N        \$22.70 N        \$22.70 N        \$22.70 N        \$22.70 N        \$22.00 N        \$43.44 Y        Del       Move To
Entering Order         Enter/Assign           Profit Detail	PUB: Ship Point  PUB: Ship Point  Publ: Ship Point Publ: Ship Point Publ: Ship Point  Publ: Ship Point  Publ: Ship Point  Publ: Ship Point Publ: Ship Point Publ: Ship Point Publ: Ship Point  Publ: Ship Point Publ: Ship Publ:	Total Due:       \$148.06         Item Status       Update Order Totals         Amount       Tax?         \$22.77       N         \$22.00       N         \$25.00       Y         Move       To         Move       To         \$25.00       Y         \$25.00

In the Section towards the middle of the screen you can see Warehouse info, Order & Ship Dates, Freight info, Which delivery route this customer is set to use, and Carrier info. All of which can be changed here for this order only. Any changes made will not be saved to the customer's record.

In the order notes tab you can leave notes for other staff members about this order. If your notes are important enough that they should see them first when they access this order check this box.

<b>W</b>	Ord	er Desk * STEP1 Supp	ly (Chad Dem	o)			
<u>F</u> ile <u>E</u> dit <u>V</u> iew							
Main Order Desk	Su	ibmit Order Review Issue	Send Quotation	Send	Order Confirmati	ion Save Order	Cancel Order
Billing Shipping Order Note	es Profit Summary				ſ	Order Status N	ew Order 🛛 🔻
🔲 Show Order Notes wh	en View/Modify Order?					Total Weight:	70
					~	Total Cubes:	0
						Merch Total:	\$139.87
						i axable Sales; Sales Tav:	\$72.29 \$4.34
						Sales Fax.	ψ <del>1</del> .51
							\$0.00
					ľ	Freight	\$3.85
						Ppd Deposit:	\$0.00
<u> </u>					× .	Total Due:	\$148.06
Entering Order	Enter/Assign Order ‡	🕴 🔽 Ready To Ship?	🔽 Ready To	Bill?		Item Status Upd	ate Order Totals
Pricing Profit Detail							
Line Type ItemCode	#Ordered #Shipped	<b>#B/O</b> Description		Opt	Price	Amount Tax?	Pri 🔨
▶ 1 I RH101	3 3	0 Big Pink Lotion	Soap	B2	7.59	\$22.77 N	
2 I SH-020-C	1 1	0 Shine Glass Cln	-ConcentrateD	d10	25.20	\$25.20 N	Edit
3 I RA008	6 6	0 Disinfectant Spr	зу	B8	3.91	\$23.46 N	Ins
4 I FLCLNCS	1 1	0 Floor Clean		d10	43.44	\$43.44 Y	Del
5 5		U Left Handed Bro	om	S	25.00	\$25.00 Y	
							Move
4							, ĭ
			_		07504.0.0	7.0505	
Connected to Server					STEPT Softwa	are v7.3526	LMS

This is an open text block for you to type in your notes on this order.

The Profit Summary tab gives you a look at your sales stats on this order including: Totals Sales, Profit, and your total margin for the order. Also shows the same info but for the commissionable sales.

1980a							_	~
<b>V</b>	Orde	r Desk * STEP1 Supply (C	had Demo	)				
<u>File Edit V</u> iew			1			. (		
Main Order Desk	Sub	mit Order Review Issue   Send	Quotation	Send	Order Confirmal	ion   Save <u>O</u> rd	ler <u>C</u> anc	el Order
<u>Billing</u> Shipping Order <u>N</u> otes	o t Summary					Order Status	New Orde	er 💌 i
Total Sales: \$139.87	Comm	Sales: <b>\$139.87</b>				Total Weight Total Cubes	:	70 0
Pub Profit: \$59.01	Comm	Profit: <b>\$59.01</b>				Merch Total	: :	\$139.87
Pub Margin%: <b>42.2</b>	Comm Ma	ırgin%: <b>42.2</b>				Taxable Sales Sales Tax	:	\$72.29 \$4.34
								·
								\$0.00
						Freigh	t	\$3.85
						Ppd Deposit	:	\$0.00
						Total Due	: \$	148.06
Entering Order	Enter/Assign Order #	🔽 Ready To Ship? 🔽	Ready To I	Bill?		Item Status U	pdate Ord	er Totals
Profit Detail								
Line Type ItemCode #1	Ordered #Shipped	<b>#B/O</b> Description		Opt	Price	Amount Tax	(? Pri 🔺	
▶ 1 I RH101	3 3	0 Big Pink Lotion Soap		B2	7.59	\$22.77 N		<b>F n</b>
2 I SH-020-C	1 1	0 Shine Glass Clnr -Con	centrateD	d10	25.20	\$25.20 N		Edit
3 1 RAU08	6 6	U Disinfectant Spray		88	3.91	\$23.46 N		Ins
A I FLULINUS	1 1	U Floor Liean			43.44	\$43.44 T		Del
				3	23.00	\$20.00 T		
								Move
<							>	
Connected to Server					STEP1 Softw	are v7.3526	CMS	

Now, before we finish up this order we need to briefly discuss the buttons we haven't covered yet. On the top of your screen, starting toward the middle and stretching all the way to the right is a series of buttons...

The Submit Order Review Issue bu discussed in the Order Review Tra	itton is ining Guide.	The Send Quotation button is discussed later is this guide in the Creating a quote section.
<b>*</b>	Order Desk * STEP1 Supp	ply (Ch <mark>ad Demo) – 🗆 🗙</mark>
<u>File E</u> dit <u>V</u> iew Main Order Desk	Submit Order Review Issue	Send Quotation Send Order Confirmation Save <u>O</u> rder <u>Cancel Order</u>
Bill To: Chicago Judicial Center 8048 S. Exchange Ave Suite 3349 Chicago IL 60617	PO Number: Salesman: Wallace Sem Sales Tax Area: Ilinois Order Source: CMS	Order Status     New Order       mper     ✓       ✓     Total Weight:       ✓     Total Cubes:       ✓     Merch Total:       Sales Tax Rate:     6
Billing Instructions:	Payment Terms: Net 45	✓     \$0.00       oice with Delivery?     \$0.00       ✓ Auto-Send Order Confirmation To     Freight       Ppd Deposit:     \$0.00       Total Due:     \$148.06
Entering Order         Enter/Assign 0           Pricing         Profit Detail           Line         Type         ItemCode         #Ordered         #Ship           1         I         RH101         3         3         4         I         RA008         6         4         I         FLCLNCS         1         3         1         2         1 <th1< th="">         1<!--</td--><td>rder # Ped #570 Description 3 0 Big Pink Lotion 0 Shine Glass Cln 6  1 1 1 0 Send Option ○ Email ⓒ FAX</td><td>Price       Amount       Tax?       Pri         Opt       Price       Amount       Tax?       Pri         Soap       B2       7.59       \$22.77       N       Edit         r. ConcentrateD       d10       25.20       \$25.20       N       Edit         Order Confirmation</td></th1<>	rder # Ped #570 Description 3 0 Big Pink Lotion 0 Shine Glass Cln 6  1 1 1 0 Send Option ○ Email ⓒ FAX	Price       Amount       Tax?       Pri         Opt       Price       Amount       Tax?       Pri         Soap       B2       7.59       \$22.77       N       Edit         r. ConcentrateD       d10       25.20       \$25.20       N       Edit         Order Confirmation
<     Connected to Server	C Print FAX Contac Fax Numbe Fax To Name From Name	<u>OK</u> <u>Cancel</u> ct:       Bobby Davis         er:       312-734-1234         re:       Bobby Davis         Cover Page Option         (* Default         Default         Cover Support
The Send Order Confirmation butto opens a new window in which you can select a method for sending, th contact you want it sent to, leave comments on the cover page & mo	DN CoverPage C Here is your Ord Thank You for y	Confirmation-PO: Successful Fax (via Email) Comments der Confirmation. your Order!

The Enter/Assign Order # button in the middle of the screen allows you to choose an order number if you don't want STEP1 to assign it automatically.

Both the Ready to Ship & Ready to Bill Check boxes will be discussed in the Order Review Training Guide.

Т

<b>W</b>				Ord	er Desk *	STEP1 Sup	ply (Chad	Dem	o)			-		x
<u>F</u> ile <u>E</u>	dit \	View												
Main O	rder De	- esk		Su	ıbmit Order R	eview Issue	Send Quot	tion	Send	Order Confirma	tion Save O	rder	<u>C</u> ancel O	Irder
Billing	Shipp	 bing Order <u>N</u> otes   F	P <u>r</u> ofit Summar	<u>—</u> у Ì							Dadas Chab	- 1	<u>.</u>	
Bill To:	Chica	ago Judicial Center		-	PO Number:			-	_		Total Weig	s inev iht:	v Urder	70
	8048	S. Exchange Ave			Salesman:	V Wallace Ser	mper			•	Total Cut	es:		Ő
	Suite	3349		Sal	les Tax Area:	Ilinois					Merch Tol	al:	\$139	9.87
	Chica	go	IL 60617	c	)rder Source:	CMS		Sa	ales Tax	Rate: 6	Taxable Sa Sales T	es: ax:	\$72 \$7	2.29 4.34
Billing Ir	, nstructi	ions:		Pay	ment Terms:	Net 45				•				
						, ∏ Send Inv	oice with Deli	/ery?					\$(	0.00
							🔽 Auto-S	end O	rder Cor	nfirmation To	Frei Ped Desc	ght	\$3	3.85
											Total Du	sic.	ېر 148	30.5
E-t-ci	- 0-	4	Enter /Ar	sian Order t	E Date	du Ta Chiaí		ь. т.,	0:02		Itom Chatro	lledat	e Order T	atala
Pricipa	ng una Duana	uer Datail	Entervas	ssign order +	• Iv nea	uy ru shipi	e 💌 neau	ју го	DIII?		Item Status	opual		Utais
			140 L L	HOL: 1					lo d	n:	A	olo	1	
	e Type		#Urdered	#Shipped 2	187U D	escription	Soon		Upt P2	7 59	Amount ¢22.77	ax? Pi N	<u>n</u> ~	
H	2 1	SH-020-C	1	1	0 5	hine Glass Cli	n Soap nr -Concentra	teD	d10	25.20	\$25.20	N	E/	dit
	- · 3 I	RA008	6	6	0 D	isinfectant Sp	pray		B8	3.91	\$23.46	N	- Ir	ns
	1 1	FLCLNCS	1	1	0 F	loor Clean	-		d10	43.44	\$43.44	Y		
	5 S		1	1	0 L	eft Handed B	room		S	25.00	\$25.00	Y		
														ove o
<												>	~	
Connec	ted to	Server								STEP1 Softw	/are v7.3526	C	٧IS	

In the very top-right corner are the Save Order & Cancel Order buttons. These I think are selfexplanatory. Click on the Save Order button now and we are done with this section of the guide.



### In this section of the guide you will learn how to enter a Credit Memo.

Our Customer, Chicago Judical Center has decided to return some product.

Once you've opened the Order Desk Module, Click on the Customers tab and zoom to:

Chicago Judical Center and Click "Order Entry/Modify"

ÿ		Order D	esk * STEP1 Supply	(Cha	id Demo)			- 🗆 🗙
Ei	le <u>S</u> earch	<u>R</u> eports Saved <u>Q</u> ueries <u>H</u> elp						
	ustomers Per	nding Orders Pending Quotes Pending Se	rvice Orders   Revie <u>w</u>	Sales <u>I</u>	_eads <u>T</u> ask	List   Tas <u>k</u> List M	gr	Cust News
	CustAcct	CustomerName	City	State	SmanCode	OfficePhone		Order Entry Medity
Г	BRONSO10	Bronson Health Care	Rosemont	IL	GJONAS	708-662-3981		Order Entry/Modily
Г	BRUCE100	Bruce Almighty Church	Fish	IN	PLEWIS	317-842-5649		
	BUBBL100	Bubbles Steakhouse	Stomach	IN	MHUGHES	765-342-4398	-	Customer Status
	BUFFA100	Buffalo Bar & Grill	Wayne	IN	WALLY	765-210-0320		
	BUSYB100	Busy Bee Cleaning Service	Embarass	IN	WALLY	317-984-9668		
	BUYER100	Buyers market	Real Estate	IN	GJONAS	765-754-7122		Send CProd Order Form
	CALVE100	Calvery Lutheran Church	Fokersbery	KY	WALLY	317-783-2000		Send Catalog Order Form
	CHANC100	Chance's Supply	No Way	IN	GJONAS	317-774-0700		
	CHARL100	Charlie's Angels Bar	Mercury	MN	GJONAS	765-674-5984		Send Statement
	CHATS100	Chatsworth Floors	Dorothy	IN	WALLY	317-594-1182		Statement Comments
	CHICAG120	Chicago City Memorial Hospital	Tipton	IL	GJONAS	765-655-8700		
Þ	CHICAG300	Chicago Judicial Center	Chicago	IL	WALLY	312-734-1233		⊻iew Order/Invoice
	CHICAG100	Chicago Unified School District	Chicago	IL	WALLY	532-345-8100		Order/Invc#
	CHIST100	Chister Supply	Skokie	IL	WALLY	312-944-7205		
	CHUCK100	Chuckies	Barrington	IN	PLEWIS	317-578-2221		Copy Order/Invoice
	CHUMP100	Chump Advisory Board	Yeahrite	IN	BOB	317-262-3410		Madifu Customer Info
	CICER100	Cicero Fiddles	Spokane	IN	GJONAS	317-984-4653		
	CITYF300	City of Fergus Falls (Fire Dept)	Mercury	MN	MHUGHES	317-477-4430		Setup a <u>N</u> ew Customer
	CITYF400	City of Fergus Falls (garage)	Fergus Falls	IN	MHUGHES	1-317-477-4390		Setup a New ShipTo
	CITYF500	City of Fergus Falls (sidewalk ro)	Fergus Falls	IN	MHUGHES	317-477-4380		D ( L C L L L L L
	CITYF600	City of Fergus Falls (water)	Fergus Falls	IN	MHUGHES	317-477-8545	$\mathbf{v}$	<u>Refresh Lustomer List</u>
<						>		772 Customers
Со	nnected to S	erver	S	TEP1 S	oftware v7.	3526 CHI	CAG	GO CMS

#### **ORDER DESK**

The item they need to return is Big Pink Lotion Soap. The price that this item was sold to them for was \$7.59. Highlight the item and double-click on it or click the Add Item to Order button (which is toward the middle of the screen on the right side) and when the new window opens give it a quantity of -1 and hit Enter. Now that you have the item added to the order we want to view the order. To do this click on the View Current Order button at the top of the screen.

					_
<b>W</b>	Order Desk * STEP1 Sup	oply (Chad Demo)			_ <b>□</b> ×
<u>File Edit Search View Reports H</u> elp					
Chicago Judicial Center	V	iew Current Order Mod	dify Customer Info Custom	er Status Cus	tomer WebSite <b>E<u>x</u>it</b>
Main Customer Notes Credit Pending Orders Open Invoices	Ledger History   Invoice <u>H</u> is	tory   Rebate Contracts   (	CPM Contract Prices   CPN	1 Policies	
Bill To: Chicago Judicial Center	Account#: CHICAG300	Order Ship To: [	Chicago Judicial Center		_
Bill Address 1: 8048 S. Exchange Ave	Salesman: WALLY	Ship Address 1: [	0040 S. Euchange Aue		-
Bill Address 2: Suite 3349 City State Zin: Chicago II 60617	Price Upt: <b>d1U</b>		ou4o S. Exchange Ave		_
Contact: Bobby Davis	Route/Dou <b>Chao /Tuo</b>	Ship Address 2: [:	Suite 3349		_
Telephone: 312-734-1233	Carrier Truck 2	City,State,Zip:	Chicago	IL  60617	_
Terms: Net 45		Ship Attention:			
Resale #: III 26-0799-87	Color Classe A	Sales Tax? <b>`</b> Tay Facialy2 <b>*</b>	Corp Acet:	JUDICAL	
Comments: Always call before shipping Contact Maxine (ex 201)	Calc Class: <b>B</b>	Charge Freight? <b>1</b>	Corp Dept:     Pmt Group:	L-JUD	
with any credit issues	Market Group: GOVT	AgeStatus: H	IId CPM Class:	City	
Current Order Summary: 0 Lines \$0.00 Total		Add Item to Order	Item 9	Status QtySolo	History Price History
Customer Products Due for ReOrder Inventory Items Sale Items					
ItemCode T C CPDescription	CurrentPrice PriceSource	Last Price LastSaleDa	te Last Qty SubCatCode	Cus 🔨 📑	Show Item Type(s)
D1915-12 I A Super Lemon Plus Degreaser 8oz	58.80 d10 Cust	35.00 1-Sep-2013	3 3 10-AIRFR		Stock Items (I)
01961 I B Urinal Screen w/Block,Cherry	2.14 d10 Cust	1.73 15-May-201	3 24 10-DEODO	<b></b>	Z Labor Items (L)
0420-55 I C Film Free Glass Cleaner	390.57 B6 CProd	390.57 15-May-201	3 0 10-GLASS		Kits (K) Machines (M)
06143 I C First Choice Carpet Pre-Spray	14.83 B5 CProd	14.83 15-May-201	3 2 10-CARPE	i i i	Service Parts (P)
07531L I B Stratus 3 Dispenser	20.99 S CProd	20.99 1-Sep-2013	3 38 10-AIRFZ	[	Show Discontinued?
101000 I A Spartan Shineline Seal 5gal	69.10 d10 Cust	65.00 15-Nov-201	4 12 10-LAUND		Sort Options
162 I B Pristine II Cleaner/Sealer	52.00 B5 CProd	52.00 8-May-201	2 1 10-FLOOR 3 4 10-FLOOR	JUD-14 (	CPDescription     ItemCode
190108 I A 26" Front Mount Squeege Kit	0.00 S CProd	0.00 1-Sep-2013	3 1 30-VACZZ	(	C Type/CPDesc
20BLK I B 20" Black Strip Pad	21.04 B6 CProd	21.04 27-Jan-201	3 5 40-PADFL		SubCat/CPDesc
20WHI I A 20" White Polish Pad	21.04 B6 CProd	21.04 27-Jan-201	3 5 40-PADFL	(	SubCat/ItemCode
Order Desk * STEP1 Supp	ly (Chad Demo)	X	120 50-RECEP		
<u>F</u> ile <u>E</u> dit <u>V</u> iew			1 10-AIRFR		
Main Order Desk Submit Order Review Issue	Send Quotation   Send Order Confirmat	tion Save Order Cancel Order	2 40-BUCWR		ems Due for ReOrder
Billing   Shipping   Order Notes   Profit Summary		Order Status New Order 💌	2 10-FLOOR		Refresh CProd List
Bill 10: Chicago Judicial Center PU Number: RETURN 8048 S. Exchange Ave Salesman: Wallace Sem	per V	Total Weight: -9 Total Cubes: 0		<u> </u>	54 CProds
Suite 3349 Sales Tax Area: Ilinois		Merch Total: (\$7.59) Taxable Sales: \$0.00	tware v7.3526 CN	٨S	
Chicago IL 60617 Order Source: CMS	Sales Tax Rate: 6	Sales Tax: \$0.00			
Billing Instructions: Payment Terms: Net 45	ice with Deliverv?	\$0.00	The First th	ning you	need to do
	Auto-Send Order Confirmation To	Freight \$0.00 Pnd Deposit \$0.00	on this scre	en is gi	ve this order
		Total Due: (\$7.59)	a PO numb	per of "R	ETURN". or
Entering Order Enter/Assign Order # 🔽 Ready To Ship?	▼ Ready To Bill?	Item Status Update Order Totals	whatever v	our com	nany would
Pricing Profit Detail				all this	party would
Line         Type         Tremuode         #Urdered         #Shipped         #B/U         Description           1         I         RH101         -1         -1         0         Big Pink Lotion	Boap B2 <b>7.59</b>	(\$7.59) N	normally ce	an uno.	
		Edit			
		Del	Also Notice	e that the	etotal
			amount due	e is nega	ative \$7.59
		Move To	because of	the neg	ative
			guantity we	e ordere	d.
Connected to Server	STED1 Caffeer	>	Note: Your	nav nee	d to zero out
	J STEPT SOTTW			nay nee	

the freight.

Now to apply this Credit Memo to an invoice we need to save it. To do so just click the Save Order button on the top-right of your screen. The system will then open up the following window and you can select the invoice to credit from here. In this case the invoice we want is Invoice # 113099. (Before you select the invoice, it is always a good idea to view the invoice first. To do this just click the View Invoice button on the bottom of the screen.)

_								
		Sele	ct Invoice t	o Ap	oly Credit M	emo To		
	<u>F</u> ile <u>S</u> earch							
	Invoice #	Invo Date	Due Date	Туре	Inve Amt	Amt Due	Status	^
	112155-1	7-Aug-2013	6-Sep-2013	IN	\$187.68	\$187.68	Delinquent	
	112952	1-Sep-2013	1-0ct-2013	IN	\$14,043.15	\$14,043.15	Delinquent	
	113099	6-0ct-2014	20-Nov-2014	IN	\$148.06	\$148.06	Current	
								~
	<						>	
ſ	Select This	Invoice to b	e Credited	View	Invoice Do N	ot Apply This Cre	dit to ANY Inv	oice
L								_
		-						

Click this button to Select the Invoice For Credit and your done! Now STEP1 has credited the customer the amount needed without voiding the original invoice so you have a clean record of exactly what happened. STEP1 has also put the item back into your available inventory.

If for some reason you decide that you don't want this credit memo apply to any of the invoices, click this button.



#### In this section of the guide you will learn how to enter an Exchange Order.

Our customer, Chicago Judical Center, accidentally purchased the wrong item recently. They would like to return it and buy the correct item. This can be done on one order in STEP1!

Once you've opened the Order Desk Module, Click on the Customers tab and zoom to: Chicago Judical Center and Click "Order Entry/Modify"

Ÿ		Order D	esk * STEP1 Supply	/ (Cha	d Demo)			- 🗆 🗙
<u>F</u> il	e <u>S</u> earch	<u>R</u> eports Saved <u>Q</u> ueries <u>H</u> elp						
	stomers Per	nding Orders Pending Quotes Pending Se	rvice Orders Review	Sales L	_eads Task	List   TaskList M	ar	Cust News
	CustAcct	CustomerName	<u> </u>	State	- · -  SmanCode	0. –		
Н	BRONSO10	Bronson Health Care	Bosemont	IL	GJONAS	708-662-3981		Urder Entry/Modity
Н	BRUCE100	Bruce Almighty Church	Fish	IN	PLEWIS	317-842-5649		
Н	BUBBL100	Bubbles Steakhouse	Stomach	IN	MHUGHES	765-342-4398		Customer Chatra
Н	BUFFA100	Buffalo Bar & Grill	Wayne	IN	WALLY	765-210-0320		Customer Status
П	BUSYB100	Busy Bee Cleaning Service	Embarass	IN	WALLY	317-984-9668		
	BUYER100	Buyers market	Real Estate	IN	GJONAS	765-754-7122		Send CProd Order Form
	CALVE100	Calvery Lutheran Church	Fokersbery	KY	WALLY	317-783-2000		Send Catalog Order Form
	CHANC100	Chance's Supply	No Way	IN	GJONAS	317-774-0700		
	CHARL100	Charlie's Angels Bar	Mercury	MN	GJONAS	765-674-5984		Send Statement
	CHATS100	Chatsworth Floors	Dorothy	IN	WALLY	317-594-1182		Statement Comments
	CHICAG120	Chicago City Memorial Hospital	Tipton	IL	GJONAS	765-655-8700		
	CHICAG300	Chicago Judicial Center	Chicago	IL	WALLY	312-734-1233		⊻iew Order/Invoice
	CHICAG100	Chicago Unified School District	Chicago	IL	WALLY	532-345-8100		Order/Invc#
	CHIST100	Chister Supply	Skokie	IL	WALLY	312-944-7205		
	CHUCK100	Chuckies	Barrington	IN	PLEWIS	317-578-2221		Copy Order/Invoice
Ц	CHUMP100	Chump Advisory Board	Yeahrite	IN	BOB	317-262-3410		Modifu Customer Info
Ц	CICER100	Cicero Fiddles	Spokane	IN	GJONAS	317-984-4653		
Ц	CITYF300	City of Fergus Falls (Fire Dept)	Mercury	MN	MHUGHES	317-477-4430		Setup a <u>N</u> ew Customer
Ц	CITYF400	City of Fergus Falls (garage)	Fergus Falls	IN	MHUGHES	1-317-477-4390		Setup a New ShipTo
Ц	CITYF500	City of Fergus Falls (sidewalk ro)	Fergus Falls	IN	MHUGHES	317-477-4380		Befreek Custemer List
	CITYF600	City of Fergus Falls (water)	Fergus Falls	IN	MHUGHES	317-477-8545	۷.	
<						>		772 Customers
Co	nnected to S	erver	S	TEP1 S	oftware v7.	3526 CHI	CAG	GO CMS

Chicago Judicial Center wants to return a case of Shine Glass Cleaner and they want to instead purchase a can of Glass Plus. This is handled similarly to any other order in STEP1. Just zoom to the Shine Glass and highlight it. Now click the Add Item to Order button. Because they are returning this item we need to give it a quantity of -1. Then zoom to the Glass Plus and click the Add Item button again. This time because they are purchasing this new item give it a quantity of 1.

					_
<b>W</b>		Order Desk * STEP1 Suppl	y (Chad Demo)		- U X
<u>File Edit Search View Reports H</u> elp				4	
Chicago Judicial Center		View	Current Order Modify	y Customer Info Customer Status	Customer WebSite Exit
Main Customer Notes Credit Pending Orders	Open In <u>v</u> oices	<u>L</u> edger History   Invoice <u>H</u> istory	Rebate Contracts CP1	PM Contract Prices CPM Policies	]
Bill To: Chicago Judicial Center		Account#: CHICAG300	Order Ship To: Ch	hicago Judicial Center	
Bill Address 1: 8048 5. Exchange Ave Bill Address 2: Suite 3349		Salesman: WALLY Price Opt: d10	Ship Address 1: 804	) 48 S. Exchange Ave	
City,State,Zip: Chicago IL	60617	1 100 Op.: <b>010</b>	Shin Address 2 <sup>-</sup> Sui	- iite 3349	
Contact: Bobby Davis		Route/Day <b>Choo/Tue</b>	City State Zier Chi		17
Telephone: 312-734-1233		Carrier Truck 2		iicago  iL  606	
Terms: Net 45			Ship Attention:		
Resale #: <b>III 26-0799-87</b>		Sales Class: A	Sales Lax? <b>Y</b> Tay Freight? <b>N</b>	Corp Acet: JUDICA	L
Comments: Always call before shipping Contact Maxine (ex 201)		Calc Class: <b>B</b>	Charge Freight? Y	Pmt Group:	
with any credit issues	N	Market Group: <b>GOVT</b>	AgeStatus: <b>Hid</b>	d CPM Class: City	
Current Order Summary: 2 Lines	(\$16.02) Total		Add Item to Order	Item Status G	tySold History Price History
Customer Products Due for ReOrder Inventory It	sale Items				
SubCategory Description (DoubleClick to Select)	Code 🔺	ItemCode Typ Cls	ItemDescription	ItemExtendedDescrip	A Show them Turne(a)
All Inventory Items (2554)		0420 I	Film Free Glass Cleaner		Show item Type(s)
CHEM: Aerosols (21)	10-AEROS	0420-55 I C	Film Free Glass Cleaner		Non-Stock (N)
CHEM DISPENSED: Air Erechener (2)			Glass Plus Shino Glass Clooper, DTU	1	Labor Items (L)
CHEM: All Purpose Cleaners (9)	10-ALL PU	30116	Sourceare-Off Concentrate	,	Kits (K)
CHEM: Automotive (4)	10-AUTO	30016 I	Squeege-Off Powder	,	Parts (P)
CHEM: Carpet Care (73)	10-CARPE	30160 I	Water Spot Remover Past	ste	<u> </u>
CHEM: Concentrate (25)	10-CONCE				Show Discontinued?
CHEM: Degreasers (25)	10-DEGRE				(SalesClass = X)
CHEM: Deodorizers (36)	10-DEODO				
CHEM: Disinfectants (6)	10-DISIN				
CHEM: Finish/Clnt/Seal/Strip (74)	10-FLOOR				
CHEM: Glass Cleaners (7)	10				
CHEM: Hand Soaps (77)	10-	10	Order Desk * STEP1 Supp	oly (Chad Demo)	
CHEM DISPENSER: Hand Soap (30)	10-	<u>v</u> iew	Submit Order Beview Issue	Send Quotation Send Order Confirmatio	n Save Order Cancel Order
CHEM: Ice Melters (5)	Biling Sh	bioping Order Notes Profit Summaru	Sublink Order Heview Issue	Send Quotation Send Order Committatio	
	Bill To: Ch	nicago Judicial Center	P0 Number:		Total Weight: -35
Connected to Server	804	48 S. Exchange Ave	Salesman: Wallace Semp	nper 💌	Total Cubes: 0
	Sui	ite 3349	Sales Tax Area: Ilinois		Merch Lotal: (\$16.02) Taxable Sales: (\$12.17)
Now click on the View	Chi	icago IL 60617	Order Source: CMS	Sales Tax Rate: 6	Sales Tax: (\$0.73)
Current Order button to look	Billing Instru	actions:	Payment Terms: Net 45	pice with Delivery?	\$0.00
at the order. Notice that the			,	Auto-Send Order Confirmation To	Freight \$3.85
Order Total is reflecting the					Total Due: (\$12.90)
	Entering (	Order Enter/Assign 0	Irder # 🔽 Ready To Ship?	✓ Ready To Bill?	Item Status Update Order Totals
difference in price between	Pricing Pre	ofit Detail			
the items.	Line Ty	vpe ItemCode #Ordered #Ship	ped #B/O Description	Opt Price	Amount Tax? Pri 🔨
	1	I SHINE-RTU -1	-1 0 Shine Glass Clea 1 0 Glass Plus	aner-RTU d10 23.04 d10 7.02	(\$23.04) Y \$7.02 Y Edit
					Ins
					Del
					To
					~
	<				>
	Connected	to Server		STEP1 Softwar	re v7.3526 CMS

In this case the item they were purchasing as a replacement was less expensive then the item returned. In that situation, a Credit Memo is issued, which can be applied to the original invoice.

-											_
<b>W</b>			Orde	er Desk '	* STEP1 Supply (Cha	ad Demo	)			-	
<u>F</u> ile <u>E</u>	dit <u>V</u> iew										
Main O	rder Desk		Su	bmit Order	Review Issue Send Q	uotation	Send C	)rder Confirma	ition Save (	<u>]</u> rder	Cancel Order
Billing	Shipping Order <u>N</u> otes	Profit Sumn	hary						Order Stat		u Order 💌
Bill To:	Chicago Judicial Center			PO Numbe	er:		1		Total Wei	as prev iaht:	-35
	8048 S. Exchange Ave			Salesmai	n: Wallace Semper			•	Total Cu	bes:	0
	Suite 3349		Sak	es Tax Area	a: Ilinois				Merch To	tal:	(\$16.02)
	Chicago	IL 60613	7 0	rder Sourci	e: CMS	Sale	es Tax f	Bate: 6	Taxable Sa Sales 1	ales: Lax:	(\$12.17) (\$0.73)
Billing Ir	pstructions:	112 10001	Pau	ment Term	s: Not 45	000		- Take: 0	5000	run.	(\$0.10)
ennig fi					Send Invoice with I	Deliveru?					\$0.00
			_		Aut	to-Send Ord	der Con	firmation To	Fre	ight	\$3.85
	1								Ppd Dep	osit:	\$0.00
									Total D	ue:	(\$12.90)
Enterir	ng Order	Enter/	Assign Order #	🛛 🔽 Re	ady To Ship? 🔽 Re	eady To E	Bill?		Item Status	Updat	te Order Totals
Enterin Pricing	n <b>g Order</b> Profi <u>t</u> Detail	Enter/	Assign Order #	Re 🛛	ady To Ship? 🔽 Re	eady To I	Bill?		Item Status	Updat	te Order Totals
Enterin Pricing	n <b>g Order</b> Profi <u>t</u> Detail Type ItemCode	Enter/	Assign Order # d <b> #Shipped</b>		ady To Ship? 🔽 Ri	eady To I	Bill? Opt	Price	Item Status Amount	Updat	te Order Totals
Enterin Pricing	ng Order Profit Detail Type ItemCode I SHINE-RTU	Enter/	Assign Order # d <mark>#Shipped</mark> 1 -1		ady To Ship? 🔽 Ro Description Shine Glass Cleaner -RT	eady To B	Bill? Opt d10	Price 23.04	Item Status Amount (\$23.04)	Updat Tax? Pi Y	te Order Totals
Enterin Pricing Line 1 2	Profit Detail Type ItemCode I SHINE-RTU I A050	Enter/	Assign Order # d #Shipped 1 -1 1 1		ady To Ship? 🔽 Ri Description Shine Glass Cleaner -RT Glass Plus	eady To B	Bill? Opt d10 d10	Price 23.04 7.02	Item Status Amount (\$23.04) \$7.02	Updat Tax? Pi Y Y	ri A Edit
Enterin Pricing Line 1 2	ng Order Profit Detail Type ItemCode I SHINE-RTU I A050	Enter/	Assign Order # d #Shipped 1 -1 1 1	₿/0 #₿/0 0	ady To Ship? 🔽 Ro Description Shine Glass Cleaner -RT Glass Plus	eady To I	Bill? Opt d10 d10	Price 23.04 7.02	Item Status Amount (\$23.04) \$7.02	Updat Tax? Pi Y Y	ri A E dit Ins
Enterin Pricing Line 1 2	Profit Detail Type ItemCode I SHINE-RTU I A050	Enter/ #Ordere	Assign Order # d <mark>#Shipped</mark> 1 -1 1 1	<b>                                   </b>	ady To Ship? 🔽 Ro Description Shine Glass Cleaner -RT Glass Plus	eady To E	Bill? Opt d10 d10	Price 23.04 7.02	Item Status Amount (\$23.04) \$7.02	Updat Tax? Pr Y Y	ri A Edit Ins Del
Entering Pricing Line 2	Profit Detail Type ItemCode I SHINE-RTU I A050	Enter/ #Ordere	Assign Order # d #Shipped 1 -1 1 1		ady To Ship? 🔽 Ri Description Shine Glass Cleaner -RT Glass Plus	eady To B	Bill? Opt d10 d10	Price 23.04 7.02	Amount (\$23.04) \$7.02	Vpdat Tax?Pi Y Y	ri A Edit Ins Del
Entering	ng Order Profit Detail Type ItemCode I SHINE-RTU I A050	Enter/ #Ordere	Assign Order # d #Shipped 1 -1 1 1		ady To Ship? 🔽 Ro Description Shine Glass Cleaner -RT Glass Plus	eady To I	0pt d10 d10	Price 23.04 7.02	Item Status Amount (\$23.04) \$7.02	Tax? Pr Y Y	ri A Edit Ins Del Move
Entering	Profit Detail	Enter/ #Ordere	Assign Order # d #Shipped 1 -1 1 1	₩ <b>B/O</b>	ady To Ship? 🔽 Ro Description Shine Glass Cleaner -RT Glass Plus	eady To I	0pt d10 d10	Price 23.04 7.02	Item Status Amount (\$23.04) \$7.02	Tax? Pr Y Y	ri ^ Edit Ins Del Move To
Enterin Pricing	Profit Detail Profit Detail Type ItemCode I SHINE-RTU I A050	Enter/	Assign Order #	₩ <b>B/O</b>	ady To Ship? 🔽 Ri Description Shine Glass Cleaner -RT Glass Plus	eady To I	0pt d10 d10	Price 23.04 7.02	Item Status Amount (\$23.04) \$7.02	Tax? Pr Y Y	ri A Edit Ins Del Move To
Entering	ng Order	Enter/ #Ordere	Assign Order # d #Shipped 1 -1 1 1	₩ <b>B/O</b>	ady To Ship? 🔽 Ro Description Shine Glass Cleaner -RT Glass Plus	eady To I	0pt d10 d10	Price 23.04 7.02	Item Status Amount (\$23.04) \$7.02	Tax?Pi Y Y	ri A Edit Ins Del Move To
Entering	Profit Detail Type ItemCode I SHINE-RTU I A050	Enter/	Assign Order #	₩ <b>B/O</b> 0 0	ady To Ship? 🔽 Ro Description Shine Glass Cleaner -RT Glass Plus	eady To I	0pt d10 d10	Price 23.04 7.02	Item Status Amount (\$23.04) \$7.02	Vpdat Tax? Pr Y Y	ri ^ Edit Ins Del Move To

You may also handle this situation with 2 separate orders in those cases where you are handing the customer the new product and picking up the item they want to return when you do your truck run. 2 separate orders is the best way to handle such an issue.



### In this section of the guide you will learn how to enter a Quotation.

Our Customer, Chicago Judical Center, would like a quote on a 32 gallon trash can with a lid. In STEP1 creating a quote works almost exactly like creating an order.

Once you've opened the Order Desk Module, Click on the Customers tab and zoom to: Chicago Judical Center and Click "Order Entry/Modify".

Ÿ		Order D	esk * STEP1 Supply	(Cha	d Demo)			- 🗆 🗙
<u>F</u> il	e <u>S</u> earch	<u>R</u> eports Saved <u>Q</u> ueries <u>H</u> elp						
C.	stomers Per	nding Orders   Pending Quotes   Pending Se	rvice Orders Revie <u>w</u>	Sales <u>I</u>	_eads ] <u>T</u> ask	List   Tas <u>k</u> List M	gr	Cust News
П	FustAcct		<u> </u>	State	  SmanCode	, – OfficePhone		
H	BBONSO10	Bronson Health Care	Bosemont	11	GIONAS	708-662-3981		Urder Entry/Modify
Н	BBUCE100	Bruce Almighty Church	Fish	IN	PLEWIS	317-842-5649		
Н	BUBBL100	Bubbles Steakhouse	Stomach	IN	MHUGHES	765-342-4398		
Н	BUFFA100	Buffalo Bar & Grill	Wavne	IN	WALLY	765-210-0320		<u>Lu</u> stomer Status
Н	BUSYB100	Busy Bee Cleaning Service	Embarass	IN	WALLY	317-984-9668		
H	BUYER100	Buyers market	Real Estate	IN	GJONAS	765-754-7122		Send CProd Order Form
Н	CALVE100	Calvery Lutheran Church	Fokersbery	KY	WALLY	317-783-2000		Cond Catalag Order Form
Н	CHANC100	Chance's Supply	No Way	IN	GJONAS	317-774-0700		Send Catalog Order Form
П	CHARL100	Charlie's Angels Bar	Mercury	MN	GJONAS	765-674-5984		Send Statement
	CHATS100	Chatsworth Floors	Dorothy	IN	WALLY	317-594-1182		Statement Comments
	CHICAG120	Chicago City Memorial Hospital	Tipton	IL	GJONAS	765-655-8700		
Þ	CHICAG300	Chicago Judicial Center	Chicago	IL	WALLY	312-734-1233		⊻iew Order/Invoice
	CHICAG100	Chicago Unified School District	Chicago	IL	WALLY	532-345-8100		Order/Invetti
	CHIST100	Chister Supply	Skokie	IL	WALLY	312-944-7205		Oldel/Invc#.
	CHUCK100	Chuckies	Barrington	IN	PLEWIS	317-578-2221		Copy Order/Invoice
	CHUMP100	Chump Advisory Board	Yeahrite	IN	BOB	317-262-3410		Marille Contained by
	CICER100	Cicero Fiddles	Spokane	IN	GJONAS	317-984-4653		Moally Customer Info
	CITYF300	City of Fergus Falls (Fire Dept)	Mercury	MN	MHUGHES	317-477-4430		Setup a <u>N</u> ew Customer
	CITYF400	City of Fergus Falls (garage)	Fergus Falls	IN	MHUGHES	1-317-477-4390		Setup a New ShipTo
	CITYF500	City of Fergus Falls (sidewalk ro)	Fergus Falls	IN	MHUGHES	317-477-4380		DI LO L
	CITYF600	City of Fergus Falls (water)	Fergus Falls	IN	MHUGHES	317-477-8545	$\checkmark$	Herresh Lustomer List
<						>		772 Customers
Co	nnected to S	erver	S	TEP1 S	oftware v7.	3526 CHI	CAG	GO CMS

Select the Item Categories tab and zoom to "receptacles". Once found double-click on it to bring up the items in this sub-category on the right. Let's say for this customer we feel that the 32 Gallon Huskee Container & Lid are the best fit. To add each item, highlight the item line and click the Add Item button.

azilar			1.0				
<b>7</b>	Or	raer Desk * STEP	1 Supp	iy (Chad Demo)			
<u>File Edit Search View Reports Help</u>							
Chicago Judicial Center			Viev	W Current Order   Mod	lify Customer Ir	nfo Customer Status (	Customer WebSite E <u>x</u> it
Main Customer Notes Credit Pending Order	s   Open In <u>v</u> oices   <u>L</u>	₌edger History Invoi	ice <u>H</u> istor	y Rebate Contracts C	CPM Contract F	Prices CPM Policies	
Bill To: Chicago Judicial Center	,	Account#: CHICAG	G300	Order Ship To: [	Chicago Judici	ial Center	
Bill Address 1: 8048 S. Exchange Ave		Salesman: WALLY		Ship Address 1: 0	040 C. Eusker		
Bill Address 2: Suite 3349	60617	Price Opt: d10			3048 S. EXChai	nge Ave	
Contact: Bobby Davis	00017			Ship Address 2:  S	Suite 3349		
Telephone: 312-734-1233	F	Carrier Truck 2	ue	City,State,Zip:	Chicago	IL 60617	
FAX: 312-734-1234				Ship Attention:			
Terms: Net 45 Besale #: 111 26-0799-87				Sales Tax? Y	,	Corp Acet: JUDICAL	
Comments: Always call before shipping	S	ales Class: A		Tax Freight? N	1 (	Corp Dept: C-JUD	
Contact Maxine (ex 201) with any credit issues	) Mari	Calo Class: <b>B</b> Ket Group: <b>GOVT</b>		Charge Freight? Y	'F	Pmt Group: CPM Class: <b>Citu</b>	
	Mai			Ageotatus. II		I M Class. City	Cold History Drive History
Current Urder Summary: U Lines	\$U.UU I otal			Add Item to Urder		Item Status   Qty:	old History Price History
	Reference Itel	ms   Sale items		lu n re			
TOOLS: Skip Shape (9)		ItemLode 1250DE	Typ Lis	ItemDescription			Show Item Type(s)
TODLS: Staps (11)	40-SIGNS	1358BK		13gt Wastebasket			Stock Items (I)
TOOLS: Sponges (9)	40-SPONG	1358GY	1	13gt Wastebasket			Non-Stock (N)
TOOLS: Sprayers & Drum Pumps (32)	40-SPRAY	2914BK	1	14qt UL Classified Wast	tebasket		✓ Labor Items (L) ✓ Kits (K)
TOOLS: Window Cleaning Equ. (68)	40-WINDO	2914SD	I	14qt UL Classified Wast	tebasket		Machines (M)
TOOLS: Miscellaneous (22)	40-ZZZZZ	1425	1	24 Gallon Round Contai	iner		Parts (P)
FIXT: Organizers & Shelves (4)	50-ORGNZ	2927SD	1	27qt UL Clasified Waste	ebasket		
FIXT: Proportioners - Chemical (6)	50-PROPO	2927BK		27qt UL Classified Wast	tebasket		Show Discontinued? (SalesClass = 'X')
FIXT: Receptacles (42)		2927BN	I D	2/qt UL Classified Wasti 29 at 11 (astabaskat	tebasket		(,
FIXT: Miscellaneous (1)	50-77777	2543		28 yi wastebasket			
PARTS: Advance (8)	90-ADVAN	2818GY	1	28gt Wastebasket			
PARTS:Briggs & Stratton Engine (49)	90-B & S	2818BK	1	28qt Wastebasket, Blac	:k		
PARTS:Batteries (10)	90-BATT	ORBR32	1	32 Gallon Atlas Containe	er		
- Add Item to	Order			32 Gallon Huskee Conta	ainer		
				32 Gallon Huskee Lid		~	Refresh Item List
Htem: 32 Gallon Huskee Container	Code: 3200	)GY				>	40 Items
	Type: I			STEP1 Sc	oftware v7.35	26 CMS	
Stock Info P	nce information	n: vice Oursetitu					
Stock Level. U Shipped: 0	iet 20	21					
Beceived: 0 Bi	4+2· 30.	. <b>21</b> 154 0					
On-Hand: 0 B	kt3: 26	.77 0	B	it instead of i	usina b'	1 or list price	which is the
Reserved: 0 Bi	kt 4: 25	.52 0	do	fault for item	e not ni	irchased by	the customer
Available: 0 B	kt 5: 24.	.87 0					
Din Order2, N	kt 6: 24.	.87 0	air	ready, we wa	nt to ma	ake 35 points	s of margins
Expected:	kt 7: 22	.93 0	on	this order. To	o do thi	s we want to	highlight the
Div On Order:	kt 8: 21.	.67 0	pri	ice field (in th	ne Add I	tem window)	) and type in
View All Warehouse Stocks   Sa	ale? N	31-Dec-99	P?	35 instead of	a price	What this d	oes is tells the
Quantity: 1	Stock	k Unit: Each	sy	stem to use t	the cost	of the item t	to figure out
Price: 24.12	Price	e Unit: Each	w	nat price is ne	eeded to	o get 35 poir	its of margin.
F HGB. [24.12	_		Do	o this for both	the co	ntainer and t	he lid line
Price Opt: P35 Change Price Opt	🔽 Charge	Sales Tax?	ite	ms and you	will get	your 35 poin	ts of margin.
One-Time Price?				-	Ū	- •	-
⊻iew Online Catalog Page	<u> </u>	<u>C</u> ancel					

Now that your items are added, click the View Current Order button. Verify that your margin is there by clicking the Profit Detail tab which is on the left side of your screen next to the pricing tab. At the top of your screen is a button called Send Quotation. Click it to send this quote to whichever contact needs it in the method you choose to send it.

ÿ			Orde	r Desk * S	STEP1 Supply (Chad	Demo)				-	□ ×
<u>F</u> ile <u>E</u>	dit <u>V</u> iew										
Main Or	rder Desk		Sub	mit Order Re	eview Issue Send Quot	ation S	end O	rder Confirma	tion <b>Sa</b>	ve <u>O</u> rder   !	Cancel Order
Billing	Shipping Order <u>N</u>	Notes Profit Summary							Order 9	itatus New	v Order 💌
Bill To:	Chicago Judicial C	Center	P	O Number:					Total	Weight:	2
	8048 S. Exchange	Ave		Salesman:	Wallace Semper			•	Tota Moroh	l Cubes: Total:	0 0 0 0 0 1 0
	Suite 3349		Sales	s Tax Area:	Ilinois			•	Taxabl	e Sales:	\$30.30 \$34.15
	Chicago	IL 60617	Ord	der Source:	CMS	Sales	Tax R	late: 6	Sa	les Tax:	\$2.05
Billing Ir	nstructions:		Paym	ient Terms:	Net 45			•		—	
			_		Send Invoice with Del	livery?	~ ~	<del>.</del>		Freight	\$0.00
					J <b>∨</b> Auto-s	end Urde	r Lonfi	irmation I o	Ppd	Deposit:	\$0.00
									Tota	al Due:	\$36.20
Enterir	ng Order	Enter/Assign	n Order #	🔽 Read	dy To Ship? 🔽 Rea	dy To Bi	11?		Item SI	atus Update	e Order Totals
Pricing	Profi <u>t</u> Detail										
Line	Type ItemCode	#Ordered #S	hipped	<b>#B/O</b> D	escription	0	)pt	Price	Amou	unt Tax? Pri	i n
1	I 3200GY	1	1	0 33	2 Gallon Huskee Containe	r P	35	24.12	\$24	12 Y	
<u>▶</u> 2	I 3201GY	1	1	0 32	2 Gallon Huskee Lid	F	35	6.18	\$6.	18 Y	- Edit
											Ins
				Verify	EAX Information						Del
		-Cond Ontion-		verny	TAX Information						Move
		C Email			Quotation						To
		© FAX	E								
		○ <u>P</u> rint		<u>o</u> k	<u>C</u> ancel						
<		FAX								>	
Connect	ted to Server	Contact: E	obby D	avis					• 5	26 CN	٨S
-		Fax Number: 🚦	12-734-	1234			Senc	Cover Pa	age 📘		
		Fax To Name: B	obby D	avis			er Pa Defei	ge Option— الا			
		From Name:	MS Sup	oport		T ĝ	For Y	our Informat	ion		
		Subject:	uotatio	n 113102	2	- N	Confid Urger	tential ht!			
		Confirm Suc	cessful	Fax ívia	Email)						
		CoverBage Com	monte		,						
		Coven age com	ments								
		<u> </u>							$\sim$		

Now you've sent the quote to the customer and we need to save it. Click on the Order status drop box and select quotation then Save the order.

<b>ÿ</b>	Order Desk *	STEP1 Supply (Chad Dem	o)	-	□ ×
<u>F</u> ile <u>E</u> dit <u>V</u> iew					
Main Order Desk	Submit Order R	eview Issue Send Quotation	Send Order Confirma	ation Save Order	Cancel Order
Billing Shipping Order Notes Profit Summa	ary	·		Order Status	station 💌
Bill To: Chicago Judicial Center	PO Number:		_	Total Weight:	2
8048 S. Exchange Ave	Salesman:	Wallace Semper	Total Cubes:	Ō	
Suite 3349	 Sales Tax Area:	Ilinois		Merch Total:	\$30.30
Chicago III 60617	Order Source:	CMS Sa	les Tax Bate: 6	Laxable Sales: Sales Tav:	\$34.15 \$2.05
Billing Instructions:	Paument Terms:	Net 45	-		\$2.00
		Send Invoice with Delivery?	<u> </u>		\$0.00
		Auto-Send 0	rder Confirmation To	Freight	\$3.85
,				Ppd Deposit:	\$0.00
				Total Due:	\$36.20
Entering Order 113102 Enter/4	ssign Order # 🔽 Rea	dy To Ship? 🔽 Ready To	Bill?	Item Status Updat	te Order Totals
Profit Detail					
Line Type ItemCode #Ordered	#Shipped #B/O D	escription	Opt Price	Amount Tax? P	ri 🔨
1 I 3200GY 1	1 0 3	2 Gallon Huskee Container	P35 24.12	\$24.12 Y	-
▶ 2 I 3201GY 1	1 0 3	2 Gallon Huskee Lid	P35 6.18	\$6.18 Y	Edit
					Ins
					Del
					Move
					~
<				>	
Connected to Server			STEP1 Softv	vare v7.3526 CM	MS

Once the customer has accepted the quote and is ready to order the products on it, click on the Pending Quotes tab and find the quote you just entered. Click the Modify Quote button to open the original quote.

💗 Order Desk * STEP1 Supply (Chad Demo) – C									
Ei	le <u>S</u> earch	<u>R</u> eports	Saved <u>Q</u> ueries	; <u>H</u> elp					
Customers Pending Orders Pending Quotes Pending Service Orders Review Sales Leads Task List Task List Mgr Cust News									
	OrderNum	Quote Date	Valid Until	Status	Customer Name	TotalDue SmanCode 🔺			
	112804	22-Aug-2013		Quotation	Mike'Misc.account	\$206.09 MHUGHESI	View Quote		
	112816	23-Aug-2013		Quotation	Bardsley, Todd	\$15.33 MHUGHES I	T Z		
	112840	24-Aug-2013		Quotation	The Westin/Capitol Ave	\$9,526.22 WALLY I	Modify Quote		
	112841	24-Aug-2013		Quotation	The Westin/Capitol Ave	\$7,051.12 WALLY I	Void Quote		
	112843	24-Aug-2013		Quotation	The Westin/Capitol Ave	\$3,013.41 WALLY I			
	112845	24-Aug-2013		Quotation	Industrial Cleaning	\$845.88 WALLY I			
	112846	24-Aug-2013		Quotation	Hamilton Southeastern Schools	\$17,690.85 PLEWIS I			
	112862	25-Aug-2013		Quotation	CCX Terminal	\$44.07 MHUGHES1			
	112863	25-Aug-2013		Quotation	Our Lady of the Greenwood School	\$400.00 MHUGHES I			
	112864	25-Aug-2013		Quotation	Diversified Cleaning	\$26.50 MHUGHES I			
	112872 25-Aug-2013		Quotation	Helmer Labs Incorporated	\$737.82 GJONAS I				
	112878 25-Aug-2013		Quotation	Good Dog Hotel And Spa	\$209.73 PLEWIS I				
	112885 25-Aug-2013		Quotation	Miscellaneous Rob's	\$6,516.88 WALLY I				
	112886	25-Aug-2013		Quotation	Miscellaneous Rob's	\$10,965.01 WALLY I			
	108593	29-Aug-2013	31-Dec-2013	Quotation	Indiana State Fairgrounds	\$53.52 MHUGHES I			
	112934	29-Aug-2013		Quotation	Crabtree Cleaning Service, Inc	\$205.49 MHUGHES1			
	112937	29-Aug-2013		Quotation	Schneck Medical Center	\$4,985.89 MHUGHES I			
	113012	8-Sep-2013		Quotation	H & R Janitorial Services	\$1,151.24 WALLY I	Print/SaveToFile		
	113018	14-Sep-2013		Quotation	Outback Stkhse/Greenwood #1513	\$202.46 MHUGHES I -			
	113028	4-0 ct-2013		Quotation	Indiana Wesleyan Univ/Louis	\$398.44 GJONAS I	Refresh Quote List		
	113102	8-0ct-2014		Quotation	Chicago Judicial Center	\$36.20 WALLY			
<						>	6∠8 Quotes		
Co	nnected to	Server			STEP1 Soft	tware v7.3526 CHICAG	D CMS		

Change the order status back to new order by selecting it in the drop box and save. This is no longer a quote, it is now a new order and can be found in the customers pending order list.



#### In this section of the guide you will learn how to Place a new item in a customer's profile.

Chicago Judical Center told their salesman that they will definitely be ordering some 20" Red Floor Pads. Rather than creating a quote the salesman wants to add this new item to the customer's history profile. This will make things easy on the customer service people when the item gets ordered.

Once you've opened the Order Desk Module, Click on the Customers tab and zoom to: Chicago Judical Center and Click "Order Entry/Modify"

🤴 Order Desk * STEP1 Supply (Chad Demo) – 🗆 🗙									
<u>F</u> ile <u>S</u> earch <u>R</u> eports SavedQueries <u>H</u> elp									
Customers   Pending Orders   Pending Quotes   Pending Service Orders   Review   Sales Leads   Task List   TaskList Mar   Cust News									
	CustAcct CustomerName City State SmanCode OfficePhone								
BBONSO10	Bronson Health Care	Bosemont	11	GIONAS	709.662.3991	<u> </u>	Order Entry/Modify		
BRUCE100	Bruce Almightu Church	Fish	IN	DI FWIS	217.842.5649				
BUBBLIO	Bubbles Steakhouse	Stomach	IN	MHUGHES	765.342.4398				
BUEEA100	Buffalo Bar & Grill	Waune	IN	WALLY	765-210-0320		Customer Status		
BUSVB100	Busu Rea Cleaning Service	Embarace	IN	WALLY	317.984.9668				
	Buyere market	Embarass Real Estate	IN	GIONAS	765-754-7122		Court Chool Octor From		
CALVE100	Calvery Lutheran Church	Fokersberu	- 11N	WALLY	217.792.2000		Send CProd Urder Form		
	Clavery Lutreran Church     Pokersberg     Na		GIONAS	317-774-0700		Send Catalog Order Form			
CHARLING	Charlie's Supply Charlie's Angels Bar	Mercuru	MN	GIONAS	765-674-5994		Send Statement		
	Chateworth Floors	December 2017 2017 2017 2017 2017 2017 2017 2017		217 594 1102		Chalana and Canada and			
	Chiesee City Memorial Hespital	Tipton	113		765-655-8700		Statement Comments		
	Chicago City Memorial Hospital	Chieses			760-600-6700		View Order (Invesion		
CHICAG300	Chicago Studicial Center	Chicago		WALLI	512-734-1233				
	Chicago Onlined School District	Chicago		WALLT	312-944-7205		Order/Invc#:		
	Chuster Supply	SKOKIE Dawimatan	IL	DLEV/IC			Copy Order/Invoice		
		Barrington	IN	PLEWIS	317-578-2221				
		reanrite		BUB	317-262-3410		Modify Customer Info		
		Spokane	IN	GJUNAS	317-984-4653		Setup a New Customer		
	City of Fergus Falls (Fire Dept)	Mercury	MN	MHUGHES	317-477-4430				
CITYF400	City of Fergus Falls (garage)	Fergus Falls	IN	MHUGHES	1-317-477-4390		Setup a New ShipTo		
CITYF500	City of Fergus Falls (sidewalk ro)	Fergus Falls	IN	MHUGHES	317-477-4380		Befresh Customer List		
	City of Fergus Falls (water)	Fergus Falls	IN	MHUGHES	317-477-8545	~			
<u> &lt;</u>					>		772 Customers		
Connected to S	erver	S	TEP1 S	oftware v7.	3526 CHI	CAG	GO CMS		

#### ORDER DESK

Now instead of customer products which is the tab we are in right now we need the Inventory Items tab. Under TOOLS: PADS: Floor Pads on the left, zoom to the floor pad by holding the Control Key and pressing Z with your cursor on the right side. In the Zooming window that opens type 20..red..pad into the Field Value line. With the item we were looking for highlighted, right click on it. In the menu that pops up select Add Item to Customer Product List.

💗 Order Desk * STEP1 Supply (Chad Demo) –								
File Edit Search View Reports Help								
Chicago Judicial Center			Vie	w Current Order	Modify Customer	Info Customer Sta	atus   Customer WebSite   Exil	
Main Customer Notes Credit Pending Orders	1 Open Invoices	Ledger History Dovoi	ce Histo	ru ] Bebate Contrac	ts   CPM Contract	Prices   CPM Polic	nies	
	- T ober u Terrere							
Bill Io: Unicago Judicial Center		Account#: CHICAL	1300	Order Ship	To: Chicago Judi	cial Center		
Bill Address 2: Suite 3349		Price Ont: d10						
City,State,Zip: Chicago IL	60617	1100 000. 010		Ship Addres	2 Suite 2249			
Contact: Bobby Davis		Route/Day Chee/Te		onip Addres	• 2. Julie 3343			
Telephone: 312-734-1233		Carrier Truck 2	10	City,State∠	∠ıp:  Chicago	lir le	50617	
FAX: 312-734-1234				Ship Attenti	ion:			
Besale #: III 26-0799-87				Sales T	ax? Y	Corp Acet: JUDI	CAL	
Comments: Always call before shipping		Sales Class: A		Tax Freig	ht? N	Corp Dept: C-JUI	D	
Contact Maxine (ex 201)		Calc Class: B		Charge Freig	ht? Y	Pmt Group:		
with any credit issues		Market Group: GOVT		AgeStal	tus: HId	CPM Class: City		
Current Order Summary: 0 Lines	\$0.00 Total			Add Item to C	)rder	Item Status	QtySold History Price Histo	
Customer Products Due for ReOrder Inventory I	tems Reference	Items   Sale Items						
SubCategory Description (DoubleClick to Select)	Code 🔺	ItemCode	Typ Cls	ItemDescription		ItemExtendedDesc	crit ^	
TOOLS: Pads - Floor Pads (125)	40-PADFL	20BLK	I B	20" Black Strip Pa	d		Show Item Type(s)	
TOOLS: Pads - Hand Pads (5)	40-PADHA	20BLD	1	20" Blend UHS Pa	ad		Stock Items [I]	
TOOLS: Strip Shoes (8)	40-SHOES	20BLU	1	20" Blue Cleaner F	Pad		I Non-Stock (N)	
TOOLS: Signs (11)	40-SIGNS	_ 20ICE	1	20" Blue Ice Buff F	Pad		Kits (K)	
TOOLS: Sponges (9)	40-SPONG	200000	1	20" COCO PADS			Machines (M)	
TOOLS: Sprayers & Drum Pumps (32)	40-SPRAY	20EMG	1	20" Emerald Strip	Pad		Parts (P)	
TOOLS: Window Cleaning Equ. (68)	40-WINDO	20H0G	1	20" Nat Fbr Hog H	lair			
TOOLS: Miscellaneous (22)	40-ZZZZZ	20BBL	1	20" PE Blue Blnd	Pad		Show Discontinue	
FIXT: Organizers & Shelves (4)	50-ORGNZ	20PURPLE		20" Purple Cleanin	ig Pads	1	(Salesciass = A)	
FIXT: Proportioners - Chemical (6)	50-PROPO	▶ 20RED	1	20" Red P	Sort On Column	(Ascending)		
FIXT: Receptacles (42)	50-RECEP	20PINK	1	20" Sonic	Cart On Calu	(Decentricity)		
HX1: Hestroom Fixtures/Dryers (2)	50-RESTR	20WHI	IA	20" White	Sort On Column	(Descending)		
PARTS: Miscellaneous (1)	DU-ZZZZZ		1	20"X-Pad	Search In Colum	n Ctrl+F		
PADIC: Advance (8) PADIC: Pringe 1: Citation Engine (49)	JU-AUVAN on p + c			20"X-Pad	FindNext In Colu	mn F3		
PARTS Diggs & Stratton Engine (49)			1		Display Column	Total		
PARTS:Castey Benjacement Parts (79)	90-CASTY			20 /14 40	Add Item to Cust	tomer Product Lis	t Refresh Item List	
Anno Scastex replacement Parts (73)	30-0451X	<					121 Items	
Connected to Server				STE	P1 Software v7	526 CMS		

Your Salesman has decided to give the customer bracket 3 pricing on these floor pads, so click the Change Customer Product Price Option button. As you can see a small window opens up with 6 different pricing options. Select the Use Bracket Price option, then in the line at the bottom type in a 3 and hit OK. Now click Save and your done!

Setup A New Customer Produc	ct	Change Price Opt
20" Red Pad <u>Main</u> C/P Description: 20" Red Pad	<u>Save</u> <u>Cancel</u>	Current Price Option:
Special C/P Desc? Current Price: 28.43 Current Price Source: d10 Cust Current Margin %: 54.4144 Published Cost: 12.96 Rebate Cost? N Last Price Paid: Last Sale Date: Customer Product Price Option Info (Use Cust Default) Change Cust Prod Price Option Change Cust Prod Price Opt	Item Type: I Sales Class: List Price: <b>31.59</b> ✓ Charge Sales Tax? ✓ Pay Commission? MSDS Information MSDS Regd? N MSDS Code:	Select Price Option: (Use Cust Default) Use Item Price Use Special Price Use Bracket Price List - Discount %
Show On Order Form/CSS?  VMI/CMI Par Stock:  Customer Part #:  Customer Product Notes Add Notes To Order?	MSDS Due? N MSDS Sent? N Date Sent ReOrder Information Date of Last Sale: Date of First Sale: ReOrder Item? Last Quantity Ordered: Qty Expected To Last: 0 Days Next Expected Order:	C Cost + <u>M</u> arkup % C <u>Profit Margin %</u> Enter Price Bracket (1-8): 3 <u>QK</u> <u>C</u> ancel

Now that you are finished adding the new item to the customers history profile let's go take a look. Return to the Customer Products tab and you will notice that the item was added to this list. Also want to point out that the last sale date is blank which indicates a quoted item. You'll see a few more items in this customer's product profile that have this blank last sale date. This just means that these item were added in the manner you just did or they are items that were included on a quote.

W Order Desk * STEP1 Supply (Chad Demo)								- 🗆 ×	
<u>File Edit Search View Reports Help</u>									
Chicago Judicial Center		Vi	ew Current (	Order Mo	dify Customer Info	Custom	ier Status C	Customer WebSite   E <u>x</u> it	
Main Customer Notes Credit Pending Orders Open Invoices Ledger History Invoice History Rebate Contracts CPM Contract Prices CPM Policies									
Bill To: Chicago Judicial Center Account#: CHICAG300 Order Ship To: Chicago Judicial Center									
Bill Address 1: 8048 S. Exchange Ave	Salesman: N	Salesman: WALLY							
Bill Address 2: Suite 3349	Price Opt: <b>c</b>	110	Ship /	Ship Address 1: 8048 S. Exchange Ave					
City,StateZip: Chicago IL 60617		Ship Address 2: Suite 3349							
Contact: Bobby Davis	Route/Day (	hgo/Tue	Citu	Citu State Zin: Chicago			1 60617		
Fax: 312-734-1233	Carrier 1	ruck 2	en	A.V	chicago		12 100011		
Terms: Net 45			Ship	Attention:					
Resale #: III 26-0799-87			_S	ales Tax? 1		orp Acet:	JUDICAL		
Comments: Always call before shipping	Cales Class: #		La Chara	ax Freight / <b>F</b> e Freight 2 <b>N</b>	N LO	orp Dept: 1 M Group:	LJUD		
with any credit issues	Market Group: 6	, 30VT	charg A	le meignite i VaeStatus: <b>I</b>	<b>ild</b> CPi	n aroap. M Class: 1	Citv		
Current Order Summary: 0 Lines \$0.00 Total			Add Iter	 m to Orde	r	Item 9	Status OtvS	iold History Price History	
Customer Products Due for BeOrder University Beference	a Itamo È Sala Ita	me							
		ana l						-Show Item Tune(s)	
0420 FE	200 57	PriceSource	Last Price	LastSaleDa	te Last Uty   Su	CLACC		Stock Items (I)	
06143 L C First Choice Carnet Pre-Sprau	14.83	B5 CProd	14.83	15-May-201	3 2 10-	CARPE		Non-Stock (N)	
07531L I B Stratus 3 Dispenser	20.99	S CProd	20.99	1-Sep-201	3 38 10-	AIRFZ		IV Labor Items (L)	
101000 I A Spartan Shineline Seal 5gal	69.10	d10 Cust	65.00	15-Nov-201	4 12 10-	LAUND		Machines (M)	
140 I A Dazzle Floor Finish	100.65	d10 Cust	69.96	5-Dec-201	2 1 10-	FLOOR	JUD-14	E Service Parts (P)	
162 I B Pristine II Cleaner/Sealer	52.00	B5 CProd	52.00	8-May-201	3 4 10	FLOOR		Show Discontinued?	
190108 I A 26" Front Mount Squeege Kit	0.00	S CProd	0.00	1-Sep-201	3 1 30-	VACZZ		Sort Options	
20BLK I B 20" Black Strip Pad	21.04	B6 CProd	21.04	27-Jan-201	3 5 40-	PADFL		C CPDescription	
	26.05	B3 CProd	21.04	07 Jun 201	40-	PADEL		<ul> <li>ItemLode</li> <li>Tupe/CPDesc</li> </ul>	
20WHI I A 20" White Polish Pad	21.04	B6 UProd	21.04	27-Jan-201	3 540			C Type/ItemCode	
231 I C Enhance Cleaner/Maintainer	3 33	B6 CProd	30.00	1.Sep.201	3 120 50.	RECEP		C SubCat/CPDesc	
3302-VAB L C Metered Aerosol Variety Kit	40.00	B6 CProd	40.00	4-Jan-2010	3 1 10-	AIRFR		U SubLat/ItemLode	
351BZ I A 35at Unibody Mopping System	120.58	d10 Cust	89.99	15-Nov-201	4 2 40-	BUCWR			
353 I B Nu-Tra Shine Sealer	32.24	B5 CProd	25.42	6-Sep-201	2 2 10-	FLOOR			
354 I C Sunny Neutral Cleaner Cube	18.97	d10 Cust	15.33	20-Mar-201	3 10 10-	FLOOR		Items Due for ReOrder	
49036 I C Grip 'n Grab Sponge	28.40	d10 Cust	25.72	1-Nov-201	2 0 40-	WINDO		Befresh CProd List	
<							>	56 CProds	
Connected to Server	Connected to Server STEP1 Software v7.3526 CMS								



#### In this section of the guide you will learn how to use the Reference Items tab.

Chicago Judical Center wants to order an item that we don't stock but have access to through an existing vendor. The Reference Items tab contains all the vendor items that we have uploaded.

#### NOTE: If you need to add reference items contact support.

Under this tab you will see several dropdown menus. these are going to help you drill down to the item or items you are looking for.

🐺 Or	rder Desk * STEP1 Supply (Chac	l Demo)			_ 🗆 🗙			
<u>File Edit Search View Reports Help</u>								
Chicago Judicial Center	View Curren	t Order Modify Cus	stomer Info Cus	tomer Status   Cust	omerWebSite <b>E<u>x</u>it</b>			
Main Customer Notes Credit Pending Orders Open Invoices	_edger History   Invoice <u>H</u> istory   Rebat	e Contracts CPM C	Contract Prices   C	CPM Policies				
Bill To: Chicago Judicial Center	Account#: CHICAG300 Di	der Ship To: Chicag	go Judicial Center	r				
Bill Address 2: Suite 3349	Price Opt: d10 Shi	p Address 1: 8048 S	6. Exchange Ave		-			
City,StateZip: Chicago IL 60617	Shi	n Address 2: Suite 3	ess 2: Suite 3349					
Contact: Bobby Davis	Route/Dav Choo/Tue	itu Stata Ziar (Chiana						
Telephone: 312-734-1233	Carrier Truck 2	ity,state,Zip:  Chicag	C Chicago IL 60617					
FAX: 312-734-1234 Terms: Net 45	SI	hip Attention:						
Resale #: 11 26-0799-87		Sales Tax? <b>Y</b>	Corp Acc	st JUDICAL				
Comments: Always call before shipping	ales Class: A	Tax Freight? N	Corp Dep	ot: C-JUD				
Liontact Maxine (ex 201)	Laid Liass: <b>B</b> UT	AgeStatus: Hid	Pmt Group CPM Class	p: ••• Citu				
Current Order Summaru: 0 Lince #0.00 Total		tem to Order	ci in cida	m Status OtuSold	History Price History			
Curterit Order Summary. O Lines solution	Cole Items		110		The The Theory			
Customer Products Due for ReUrder Inventory items	Sale Items							
Select Supplier: [All Suppliers]	•		Inve	entory Items				
Select Items Where: ItemDescription 🔹 Contains 💌	(Enter value here)		Refr	resh Item List				
And:	(Enter value here)							
Typ Cls Reference Item Description	Supplier Part Number	Supplier Lis	st Price Unit	SubCatCode	^			
N AIRKEM 15.5oz AEROSOL ENDUST FURNITURE POLISH	2134375	SAALF100	91.64 CTN					
N BAGCRAFT 5.25'X 3.25'X 12" PINCH BOTTOM DUBL-WA	× BAG 2026875	SAALF100	135.60 CTN					
N BAGCRAFT 8.25'X 5.25'X 10.75'' KRAFT DOUBL-FRESH T	TO GO BAG 2026891	SAALF100	238.38 CTN					
N BAGCRAFT 15'X 16" BLUE WAXED SANDWICH WRAP	5143445	SAALF100	102.78 CTN					
N BAGCRAFT 3.5'X 2'X 26'' CRISPY CRUST BREAD BAG	5143491	SAALF100	226.62 CTN					
N FORT JAMES ENDANCERED SPECIES & DINO'S DUE FU	2044001	SAALF100	333.50 UIN 95.32 CTN					
N FORT JAMES ENDANGERED SPECIES & DINO S HOLE NI	2152451 2152453	SAALF100	140.38 CTN					
N *JAME BIV TBANSL PLASTIC SLOT LID FOB 12-2207 PA	PEB COLD (12025831	SAALF100	54.52 CTN					
N SWEETHEART 3.5oz WHT CENTER PIECE FOAM BOWL	2133744	SAALF100	71.20 CTN					
N SWEETHEART 100Z CLR DIAMOND PLASTIC TUMBLER	2172500	SAALF100	132.02 CTN					
N 9650 3M 3'X 4.5" SCOTCH-BRITE GENERAL PURPOSE S	CRUBBING F 2273848	SAALF100	54.24 CTN					
N C-31 3M 6'X 4.25'X 1 5/8" SPONGE	5355222	SAALF100	65.50 CTN		J			
Connected to Server		STEP1 Softwar	re v7.3526	CMS				

Suppose we have a customer on the phone that is looking for a low density can liner, we can use the drill down to get to them.

Select Items Where: Choose Item Description, Contains, and then enter "Liner" And on the next line Choose Item Description again, then Contains, and then enter "Low"

Click the Refresh Item List button on the right and there you go... All of the Low Density Liners you have the ability to provide for your customer.

💗 Order Desk	* STEP1 Supply (Chad	Demo)				_ 🗆 🗙
<u>F</u> ile <u>E</u> dit <u>S</u> earch <u>V</u> iew <u>R</u> eports <u>H</u> elp						
Chicago Judicial Center	View Current	Order Modify	y Customer Inf	o Custon	mer Status Cu	ıstomer WebSite <b>E<u>x</u>it</b>
Main Customer Notes Credit Pending Orders Open Invoices Ledger Histor	y   Invoice <u>H</u> istory   Rebate	Contracts   CF	PM Contract Pr	ices   CPI	M Policies	1
Bill To: Chicago Judicial Center Account#: 0 Bill Address 1: 8048 S. Exchange Ave Salesman: V	CHICAG300 Ord VALLY	er Ship To: 🛛 🗌	hicago Judicia	l Center		
Bill Address 2: Suite 3349 Price Opt: d	1 <b>0</b> Ship	Address 1: 80	148 S. Exchang	ge Ave		
City,StateZip: Chicago IL 60617	Ship	Address 2: Su	uite 3349			
Telephone: 312-734-1233	hgo/Tue City	,State,Zip: Ch	nicago		IL 60617	
FAX: 312-734-1234	ruck 2 Ship	o Attention:				
Terms: Net 45 Recale #: 111 26:0799:87	:	Sales Tax? Y	С	orp Acct:	JUDICAL	
Comments: Always call before shipping Sales Class: A	, T	ax Freight? N	C	orp Dept:	C-JUD	
Contact Maxine (ex 201) Calc Class: B with any credit issues Market Group: G	Charj	ge Freight? <b>Y</b> AgeStetue: <b>H</b> k	e Pr	nt Group: - M. Classe: -	Citu	
Survey Dedes Survey and Deliver AD 00 Table		Ageotalus, mi	u u	M Cidss.	City Chabun DieCa	del History   Drine History
Current Order Summary: U Lines \$0.00 Fotal				item		
Customer Products   Due for ReUrder   Inventory Items   Reference items   Sale Ite	ms					
Select Supplier: (All Suppliers)	•			Inven	tory Items	
Select Items Where: ItemDescription   Contains  Iiner				Refres	sh Item List	
And: ItemDescription 🗨 Contains 👻 Iow				23	Items	
	Supplier Part Number	Supplier	List Price	Unit Su	ubCatCode	
► N HERITAGE 40'X 46" 1.2MIL BLK LOW DENSITY CAN LINER	5509369	SAALF100	34.38	CTN	abedicode	
N HERITAGE 43'X 47" 2MIL BLK LOW DENSITY CAN LINER	5185367	SAALF100	63.02	CTN		
N NA PLASTICS 22"X 16"X 58" 2MIL BLK LOW DENSITY CAN LINER	2097848	SAALF100	71.82	CTN		
N NA PLASTICS 24"X 23" 1MIL BLK LOW DENSITY CAN LINER	2115580	SAALF100	49.46	CTN		
N NA PLASTICS 24"X 32" TMIL BLK LOW DENSITY CAN LINER	2115485	SAALF100	70.96	CIN		_
N NA PLASTICS 30 X 36 1.0MIL BLK LOW DENSITY LINER	2115466	SAALF100	44.00 65.98	CTN		
N NA PLASTICS 33'X 39" 1.5MIL BLK LOW DENSITY CAN LINER		N N	Andifu Spacia	llino		
N NA PLASTICS 33"X 39" 1MIL BLK LOW DENSITY CAN LINER	Ella II-la	IV	nouny specie	ai Line		
N NA PLASTICS 33'X 39" 2MIL BLK LOW DENSITY CAN LINER		4005/ 470 0640				
N NA PLASTICS 33"X 39" BLK X-HEAVY LOW DENSITY CAN LINER	Description: HERITAGE	43 X 47 ZMIL	BLK LUW	0	Line Number:	
N NA PLASTICS 38 X 38 ./MILICLE LUW DENSITY CAN LINER	Number Ordered.	1			Line Type: <b>S</b>	
	Number B/0:	0				
Connected to Server	Unit Price (S ): 6:	3.02 Sustem F	Price (S. ):	63.02		ľ
	One-Time Price?	oyo.om		00.02		F
The item will be added to the order as a	Ship Wgt/unit:	20				
The item will be added to the order as a	Sub-Cat: Special Order Items			-	I litem Informa	ition
special. Check over and fill in anything on	Supplier: Saalfeld Bedistributi	on		•		TN
the Special Line screen you need and click	Supplier Part Number: 51853	57			Price Mult: 1	
OK	Cost Information				Hazard Infor	mation
	Comm Cost: 0.00	Allow	Auto Cost Upda Roba	ate? 🔽	MSDS Requ	uired?
	G/L Ave Cost 0	00 Beba	te Cost:	KG !	MSDS (	Code:
	Pub Cost %:	6 SI	td Cost:	0.00	Hazaro HazMat (	dous?] Code:
	G/L Interface Dept M	faior Sub-	1			
	Sales	100		Sa	ales Tax?	
	Cost of Sales 5	5200		Pri	int On Invoice?	01
	Inventory 1	200		🔲 🗖 Bio	d Line?	<u> </u>

## 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

