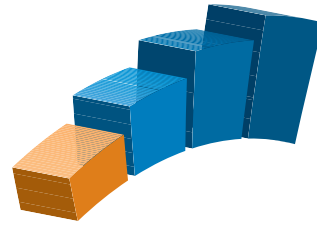


v.7 Training

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

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



STEP1[®] SOFTWARE SOLUTIONS
ONE STEP AHEAD

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 GET STARTED

- OPEN THE FOLLOWING MODULES:
- ORDER DESK

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

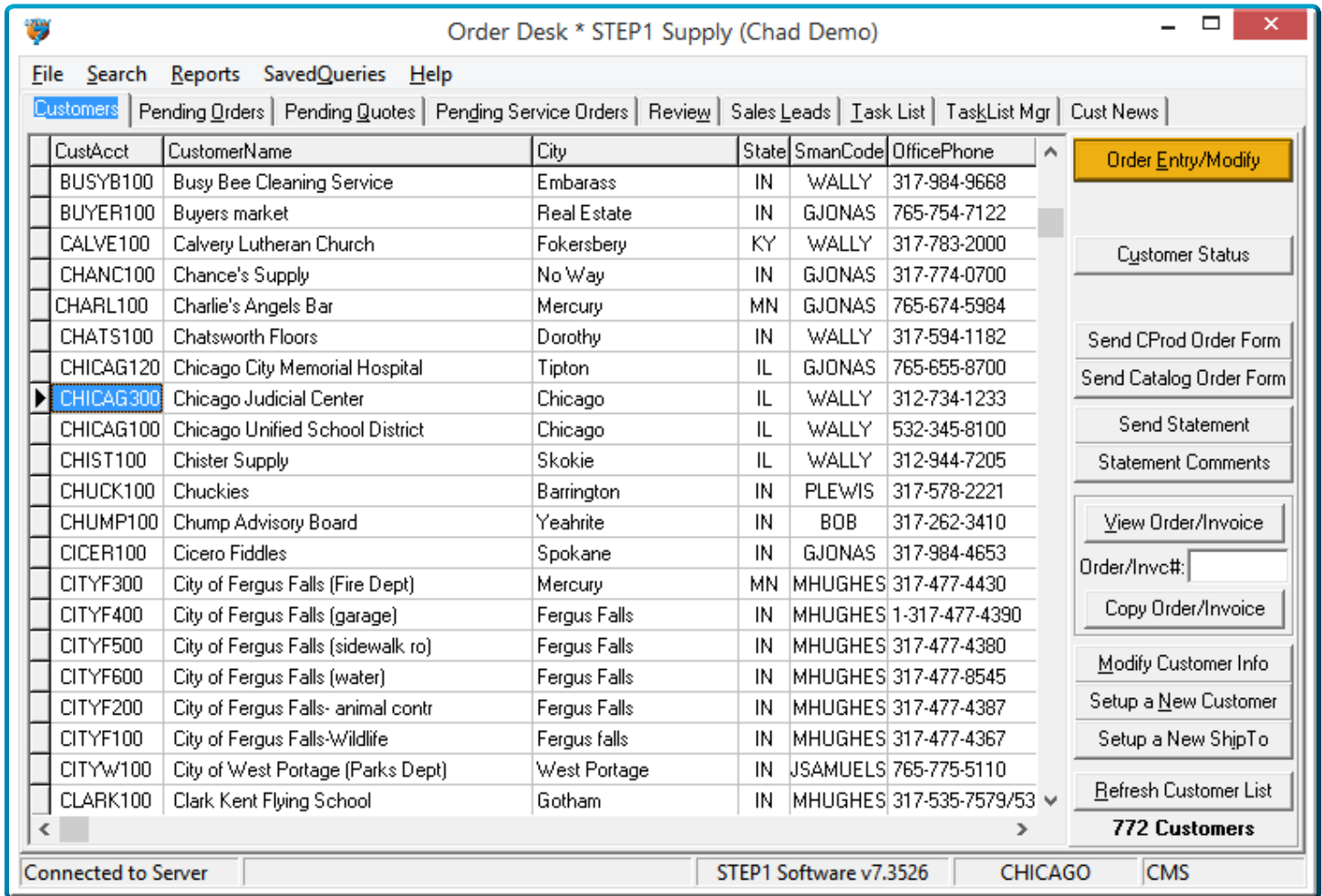
MOST MODULE TRAINING SESSIONS TAKE ABOUT AN HOUR



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

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"



The screenshot shows the 'Order Desk * STEP1 Supply (Chad Demo)' application window. The main area displays a table of customers, with 'CHICAG300 Chicago Judicial Center' selected. The sidebar on the right contains several buttons for customer management, including 'Order Entry/Modify' (highlighted in yellow), 'Customer Status', 'Send CProd Order Form', 'Send Catalog Order Form', 'Send Statement', 'Statement Comments', 'View Order/Invoice', 'Copy Order/Invoice', 'Modify Customer Info', 'Setup a New Customer', 'Setup a New ShipTo', and 'Refresh Customer List'. The status bar at the bottom indicates 'Connected to Server', 'STEP1 Software v7.3526', 'CHICAGO', and 'CMS'.

CustAcct	CustomerName	City	State	SmanCode	OfficePhone
BUSYB100	Busy Bee Cleaning Service	Embarass	IN	WALLY	317-984-9668
BUYER100	Buyers market	Real Estate	IN	GJONAS	765-754-7122
CALVE100	Calvery Lutheran Church	Fokersbery	KY	WALLY	317-783-2000
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
CHICAG120	Chicago City Memorial Hospital	Tipton	IL	GJONAS	765-655-8700
▶ CHICAG300	Chicago Judicial Center	Chicago	IL	WALLY	312-734-1233
CHICAG100	Chicago Unified School District	Chicago	IL	WALLY	532-345-8100
CHIST100	Chister Supply	Skokie	IL	WALLY	312-944-7205
CHUCK100	Chuckies	Barrington	IN	PLEWIS	317-578-2221
CHUMP100	Chump Advisory Board	Yeahrite	IN	BOB	317-262-3410
CICER100	Cicero Fiddles	Spokane	IN	GJONAS	317-984-4653
CITYF300	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
CITYF500	City of Fergus Falls (sidewalk ro)	Fergus Falls	IN	MHUGHES	317-477-4380
CITYF600	City of Fergus Falls (water)	Fergus Falls	IN	MHUGHES	317-477-8545
CITYF200	City of Fergus Falls- animal contr	Fergus Falls	IN	MHUGHES	317-477-4387
CITYF100	City of Fergus Falls-Wildlife	Fergus falls	IN	MHUGHES	317-477-4367
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

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.

Order Desk * STEP1 Supply (Chad Demo)

File Edit Search View Reports Help

Chicago Judicial Center View Current Order Modify Customer Info Customer Status Customer WebSite Exit

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: **WALLY** Ship Address 1: 8048 S. Exchange Ave
 Bill Address 2: **Suite 3349** Price Opt: **d10** Ship Address 2: Suite 3349
 City,State,Zip: **Chicago IL 60617** Route/Day **Chgo/Tue** City,State,Zip: Chicago IL 60617
 Contact: **Bobby Davis** Carrier **Truck 2** Ship Attention:
 Telephone: **312-734-1233** Sales Tax? **Y** Corp Acct: **JUDICAL**
 FAX: **312-734-1234** Tax Freight? **N** Corp Dept: **C-JUD**
 Terms: **Net 45** Charge Freight? **Y** Pmt Group:
 Resale #: **Ill 26-0799-87** AgeStatus: **Hid** CPM Class: **City**
 Comments: **Always call before shipping** Sales Class: **A**
Contact Maxine (ex 201) Calc Class: **B**
with any credit issues Market Group: **GOVT**

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

ItemCode	T	C	CPDescription	CurrentPrice	PriceSource	Last Price	LastSaleDate	Last Qty	SubCatCode	Cus
01915-12	I	A	Super Lemon Plus Degreaser 8oz	58.80	d10 Cust	35.00	1-Sep-2013	3	10-AIRFR	
01961	I	B	Urinal Screen w/Block,Cherry	2.14	d10 Cust	1.73	15-May-2013	24	10-DE0DD	
01ADV-5321	M	C	Advance BA 5321 Auto Scrubber	7,395.75	d10 Cust				30-FLOOR	
0420-55	I	C	Film Free Glass Cleaner	390.57	B6 CProd	390.57	15-May-2013	0	10-GLASS	
06143	I	C	First Choice Carpet Pre-Spray	14.83	B5 CProd	14.83	15-May-2013	2	10-CARPE	
07531L	I	B	Stratus 3 Dispenser	20.99	S CProd	20.99	1-Sep-2013	38	10-AIRFZ	
101000	I	A	Spartan Shinline Seal 5gal	69.10	d10 Cust	65.00	15-Nov-2014	12	10-LAUND	
140	I	A	Dazzle Floor Finish	100.65	d10 Cust	69.96	5-Dec-2012	1	10-FLOOR	JUD-14
162	I	B	Pristine II Cleaner/Sealer	52.00	B5 CProd	52.00	8-May-2013	4	10-FLOOR	
190108	I	A	26" Front Mount Squeege Kit	0.00	S CProd	0.00	1-Sep-2013	1	30-VACZZ	
20BLK	I	B	20" Black Strip Pad	21.04	B6 CProd	21.04	27-Jan-2013	5	40-PADFL	
20WHI	I	A	20" White Polish Pad	21.04	B6 CProd					
251	I	C	Enhance Cleaner/Maintainer	51.68	d10 Cust					
2818BE	I	D	28 qt Wastebasket	3.33	B6 CProd					
3302-VAR	I	C	Metered Aerosol Variety Kit	40.00	B6 CProd					
351BZ	I	A	35qt Unibody Mopping System	120.58	d10 Cust					
353	I	B	Nu-Tra Shine Sealer	32.24	B5 CProd					

Connected to Server

Show Item Type(s)
 Stock Items (I)
 Non-Stock (N)
 Labor Items (L)
 Kits (K)
 Machines (M)
 Service Parts (P)
 Show Discontinued?
 Sort Options
 CPDescription
 ItemCode
 Type/CPDesc
 Type/ItemCode
 SubCat/CPDesc

The first item we want is Big Pink Lotion Soap. To find it hold down the Control Key and press "Z" to open the searching window. In the Field Value line type the word ..Pink Lotion.. and hit Enter.

Search in Current Column

Field Value

Search Type
 Case-sensitive
 Exact Match
 Partial Match at Beginning
 Partial Match Anywhere

Fields

First Next Cancel

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 Supply (Chad Demo)

Chicago Judicial Center | **View Current Order** | Modify Customer Info | Customer Status | Customer WebSite | **Exit**

File Edit Search View Reports Help

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: **WALLY** | Ship Address 1: 8048 S. Exchange Ave
 Bill Address 2: **Suite 3349** | Price Opt: **d10** | Ship Address 2: Suite 3349
 City,State,Zip: **Chicago IL 60617** | Route/Day **Chgo/Tue** | City,State,Zip: Chicago IL 60617
 Contact: **Bobby Davis** | Carrier **Truck 2** | Ship Attention:
 Telephone: **312-734-1233** | Sales Tax? **Y** | Corp Acct: **JUDICAL**
 FAX: **312-734-1234** | Tax Freight? **N** | Corp Dept: **C-JUD**
 Terms: **Net 45** | Charge Freight? **Y** | Pmt Group:
 Resale #: **Ill 26-0799-87** | AgeStatus: **Hid** | CPM Class: **City**
 Comments: **Always call before shipping** | Sales Class: **A**
Contact Maxine (ex 201) | Calc Class: **B**
with any credit issues | Market Group: **GOVT**

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

ItemCode	T	C	CPDescription	CurrentPrice	PriceSource	Last Price	LastSaleDate	Last Qty	SubCatCode	Cus
A05113	I	C	Bulldog Loop Mop, Large	6.37	B3 CProd	6.37	1-Sep-2013	17	40-MOPSW	
A430120	I	B	Go Go Blue Blend Mop, 20oz	3.50	c Cus/Con				40-MOPSW	
A70412	I	C	Stallion Mop Handle	11.83	B6 CProd	11.83	1-Sep-2013	12	40-HANDM	
CT-44444	I	B	Delimer Concentrate	14.69	B6 CProd	13.99	17-May-2012	0	10-FOODS	
D3624	I	C	24" Standard Plus Dust Mop	9.98	B5 CProd	9.98	27-Jan-2013	5	40-DUSTM	
FG7570L20000	I	C	3" Caster w/ Insert	5.50	S CProd	5.50	14-Mar-2013	12	40-BUCWR	
JZ3349	I	A	Stainless Steel Cleaner	4.20	B7 CProd	4.20	26-Jun-2013	48	10-AEROS	
M116	I	D	60" Snap on handle	12.59	B5 CProd	12.59	1-Sep-2013	17	40-HANDM	
PT20112	I	B	1 Ply Jumbo Tissue	33.10	D30 CProd	0.00	15-Nov-2014	1	20-AUNTI	
RA008	I	A	Disinfectant Spray	3.91	B8 CProd	3.91	21-Jul-2013	0	10-AEROS	
RH101	I	B	Big Pink Lotion Soap	7.59	B2 CProd	7.59	21-Jul-2013	5	10-HANDS	
S434822K	I	B	56 Gal. Hi-D 22 MIC Liners	28.28	S CProd	28.28	29-Mar-2013	2	20-LHIGH	
SH-020-C	I	A	Shine Glass Clnr - ConcentrateD	25.20	d10 Cust	19.38	21-Jul-2013	2	10-CONCE	
SN082433	I	B	16 Gal. Hi-D 8 MIC Liners	24.46	B8 CProd	24.46	1-Sep-2013	2	20-LHIGH	
T-500	I	C	Heave Duty Tissue	64.59	B5 CProd	64.59	16-Sep-2012	1	10-HANDZ	
TB224348	I	A	56 Gal. Hi-D 22 MIC Liners	25.09	B7 CProd	25.09	1-Sep-2013	2	20-LHIGH	
~SPECIAL	L		Special Order Items	1.44	S CProd					

Sort Options:
 CPDescription
 ItemCode
 Type/CPDesc
 Type/ItemCode
 SubCat/CPDesc
 SubCat/ItemCode

Items Due for ReOrder

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.

Add Item to Order

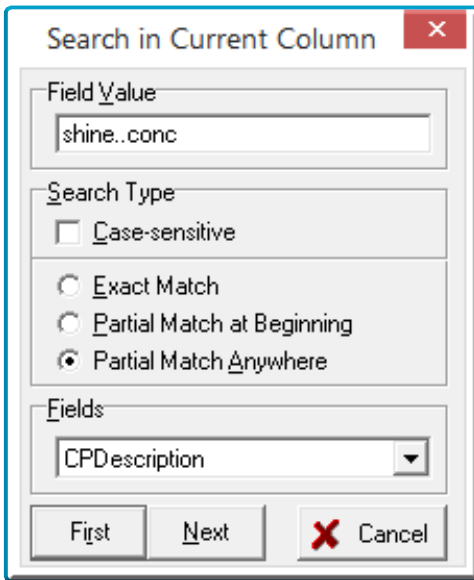
Item: Big Pink Lotion Soap | Code: RH101 | Type: I

IL Stock Info		Price Information:	
Stock Level:	20	Price	Quantity
Shipped:	0	List:	8.91
Received:	0	Brkt 2:	7.59 0
On-Hand:	20	Brkt 3:	7.13 0
Reserved:	0	Brkt 4:	6.81 0
Available:	20	Brkt 5:	6.67 0
On Order?	N	Brkt 6:	6.21 0
Expected:		Brkt 7:	5.66 0
Qty On Order:		Brkt 8:	5.26 0
View All Warehouse Stocks		Sale? N	31-Dec-99

Quantity: | | | Stock Unit: Gal
 Price: | Price Unit: Gal

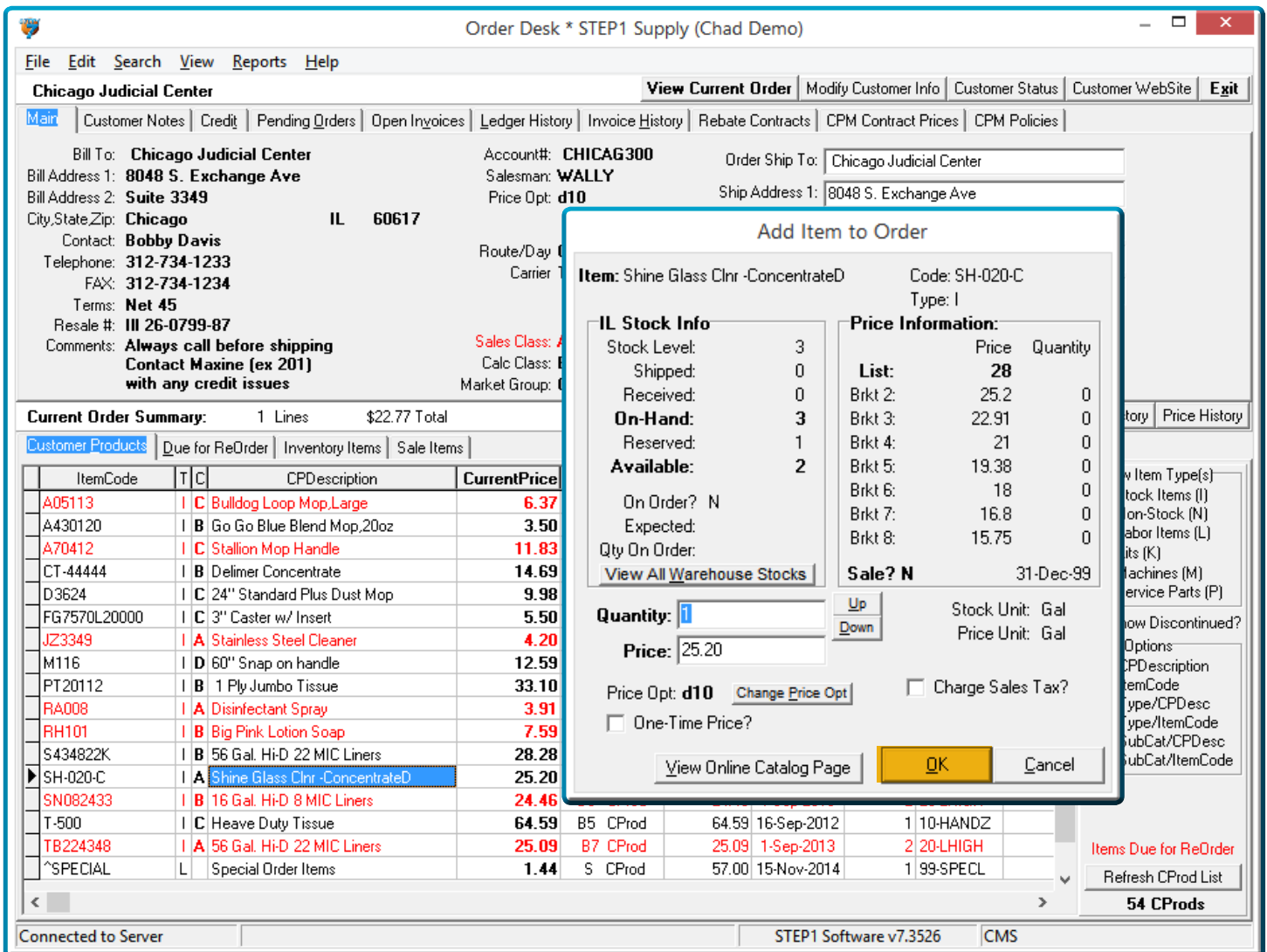
Price Opt: **B2** | | Charge Sales Tax?
 One-Time Price?

| |



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.



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 [View Current Order](#) [Modify Customer Info](#) [Customer Status](#) [Customer WebSite](#) [Exit](#)

[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: **WALLY** Ship Address 1: 8048 S. Exchange Ave
 Bill Address 2: **Suite 3349** Price Opt: **d10** Ship Address 2: Suite 3349
 City,State,Zip: **Chicago IL 60617** Route/Day **Chgo/Tue** City,State,Zip: Chicago IL 60617
 Contact: **Bobby Davis** Carrier **Truck 2** Ship Attention:
 Telephone: **312-734-1233** Sales Tax? **Y** Corp Acct: **JUDICAL**
 FAX: **312-734-1234** Tax Freight? **N** Corp Dept: **C-JUD**
 Terms: **Net 45** Charge Freight? **Y** Pmt Group:
 Resale #: **Ill 26-0799-87** Market Group: **GOVT** AgeStatus: **Hid** CPM Class: **City**
 Comments: **Always call before shipping** Sales Class: **A**
Contact Maxine (ex 201) Calc Class: **B**
with any credit issues Market Group: **GOVT**

Current Order Summary: 2 Lines \$47.97 Total [Add Item to Order](#) [Item Status](#) [QtySold History](#) [Price History](#)

[Customer Products](#) | [Due for ReOrder](#) | [Inventory Items](#) | [Sale Items](#)

ItemCode	T	C	CPDescription	CurrentPrice	PriceSource	Last Price	LastSaleDate	Last Qty	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		<input checked="" type="checkbox"/> Stock Items (I)
01961	I	B	Urinal Screen w/Block,Cherry	2.14	d10 Cust	1.73	15-May-2013	24	10-DEODO		<input checked="" type="checkbox"/> Non-Stock (N)
01ADV-5321	M	C	Advance BA 5321 Auto Scrubber	7,395.75	d10 Cust				30-FLOOR		<input checked="" type="checkbox"/> Labor Items (L)
0420-55	I	C	Film Free Glass Cleaner	390.57	B6 CProd	390.57	15-May-2013	0	10-GLASS		<input checked="" type="checkbox"/> Kits (K)
											<input checked="" type="checkbox"/> 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.

Order Desk * STEP1 Supply (Chad Demo)

File Edit View

Main Order Desk [Submit Order Review Issue](#) [Send Quotation](#) [Send Order Confirmation](#) [Save Order](#) [Cancel Order](#)

[Billing](#) | [Shipping](#) | [Order Notes](#) | [Profit Summary](#)

Bill To: Chicago Judicial Center PO Number:
 8048 S. Exchange Ave Salesman: Wallace Semper
 Suite 3349 Sales Tax Area: Illinois
 Chicago IL 60617 Order Source: CMS Sales Tax Rate: 6
 Billing Instructions: Payment Terms: Net 45
 Send Invoice with Delivery?
 Auto-Send Order Confirmation To

Order Status New Order

Total Weight: 27
 Total Cubes: 0
Merch Total: \$47.97
 Taxable Sales: \$3.85
 Sales Tax: \$0.23

Freight: \$0.00
 Freight: \$3.85
 Ppd Deposit: \$0.00
Total Due: \$52.05

Entering Order [Enter/Assign Order #](#) **Ready To Ship?** **Ready To Bill?** [Item Status](#) [Update Order Totals](#)

[Pricing](#) | [Profit Detail](#)

Line	Type	ItemCode	#Ordered	#Shipped	#B/O	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 Clnr -ConcentrateD	d10	25.20	\$25.20	N	

Edit
Ins
Del
Move To

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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.

Adding an item from this column works exactly like before just click on the item to highlight and add it to the order. For this example let's highlight Disinfectant Spray. Click the Add Item to Order button and change the quantity to 6, then click OK.

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](#) [QtySold History](#) [Price History](#)

Customer Products | [Due for ReOrder](#) | **Inventory Items** | [Sale Items](#)

SubCategory Description (DoubleClick to Select)	Code	ItemCode	Typ	Cls	ItemDescription	ItemExtendedDescrip
▶ All Inventory Items (2553)		▶ A985	I	A	Citrus Cleaner/Deodorizer	
CHEM: Aerosols (21)	10-AEROS	YA005	I		All Purpose Cleaner	
CHEM: Air Fresheners (31)	10-AIRFR	YA003	I		Baby Powder Spray	
CHEM DISPENSER: Air Freshener (3)	10-AIRFZ	YA010	I		Citrus Foaming Cleaner	
CHEM: All Purpose Cleaners (9)	10-ALLPU	RA008	I	A	Disinfectant Spray	
CHEM: Automotive (4)	10-AUTO	FA004	I		Dust Mop Treatment	
CHEM: Carpet Care (73)	10-CARPE	A859	I		Formula X Gel Stripper	
CHEM: Concentrate (25)	10-CONCE	YA006	I		Furniture Polish	
CHEM: Degreasers (25)	10-DEGRE	RA009	I		Germicidal Cleaner	
CHEM: Deodorizers (36)	10-DEODO	A031	I	B	Glass Plus Aerosol	
CHEM: Disinfectants (6)	10-DISIN	RA001	I		GlassPlus Window Cleaner	
CHEM: Finish/Clnr/Seal/Strip (74)	10-FLOOR	CA002	I		Gum Remover	
CHEM: Food Service. (34)	10-FOODS	2900051	I		Intense All Purpose Cleaner	
CHEM: Glass Cleaners (7)	10-GLASS	YA004	I		Island Fresh Spray	
CHEM: Hand Soaps (77)	10-HANDS	A175-20	I		Misty Solvent Based Spot Rmvr.	
CHEM DISPENSER: Hand Soap (30)	10-HANDZ	YA001	I		Orchard Fresh Spray	
CHEM: Ice Melters (5)	10-ICE					

Show Item Type(s)

Stock Items (I)

Non-Stock (N)

Labor Items (L)

Kits (K)

Machines (M)

Parts (P)

Show Discontinued? (SalesClass = 'X')

[Refresh Item List](#)

1626 Items

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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 \$71.43 Total [Add Item to Order](#) [Item Status](#) [QtySold History](#) [Price History](#)

Customer Products | [Due for ReOrder](#) | **Inventory Items** | [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	
CHEM: Aerosols (21)	10-AEROS	▶ FLCLNCS	I		Floor Clean	
CHEM: Air Fresheners (31)	10-AIRFR	GREASEGO	I		Grease GO	
CHEM DISPENSER: Air Freshener (3)	10-AIRFZ	GREASEGO5	I		Grease Go	
CHEM: All Purpose Cleaners (9)	10-ALLPU	202-05	I		GreaseBuster HD Degreaser	
CHEM: Automotive (4)	10-AUTO	323RTU	I		Laser Shot	
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	
▶ CHEM: Degreasers (25)	10-DEGRE	20450	I		Orange 88 Degreaser	
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-FOODS	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	0025C-01	I		Super Citrus Plus Degreaser	
CHEM: Ice Melters (5)	10-ICE					

Show Item Type(s)

Stock Items (I)

Non-Stock (N)

Labor Items (L)

Kits (K)

Machines (M)

Parts (P)

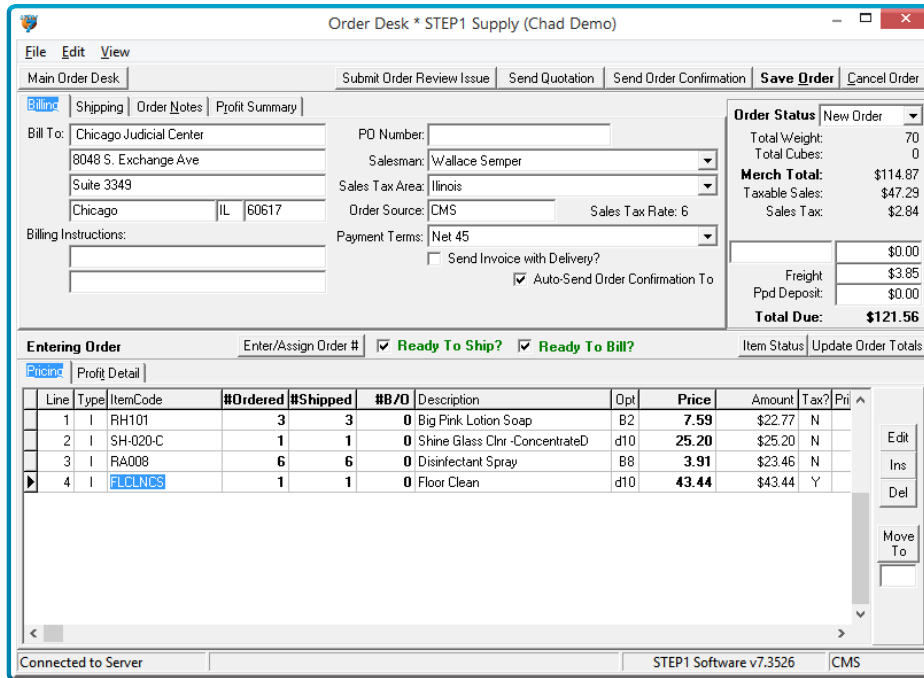
Show Discontinued? (SalesClass = 'X')

[Refresh Item List](#)

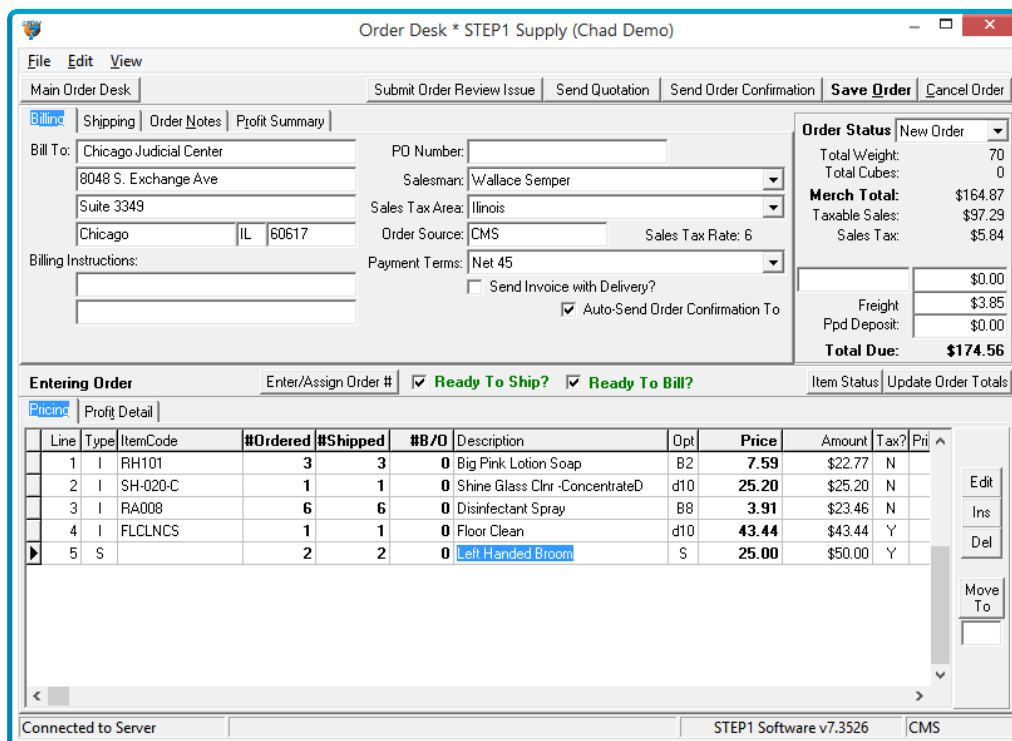
25 Items

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.



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.



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

File Help

Description:

Number Ordered:

Number Shipped:

Number B/O:

Unit Price (S): System Price (S):

One-Time Price?

Ship Wgt/unit:

Sub-Cat:

Supplier:

Supplier Part Number:

Order Number:

Line Number:

Line Type: **S**

Cost Information

Comm Cost: **10.60** Allow Auto Cost Update?

G/L Ave Cost: Rebate?

Pub Cost %: Rebate Cost:

Std Cost:

Item Information

Item Code:

Price Unit: **Each**

Price Mult: **1**

Hazard Information

MSDS Required?

MSDS Code:

Hazardous?

HazMat Code:

G/L Interface

Dept	Major	Sub
Sales	4100	
Cost of Sales	5200	
Inventory	1200	

Sales Tax?
 Commission Line?
 Print On Invoice?
 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.

The screenshot shows the 'Order Desk * STEP1 Supply (Chad Demo)' window. It is divided into several sections:

- Billing Section (Left):** Contains fields for 'Bill To' (Chicago Judicial Center, 8048 S. Exchange Ave, Suite 3349, Chicago, IL 60617) and 'Billing Instructions'.
- Order Entry Section (Middle):** Includes a 'PO Number' field, 'Salesman' (Wallace Semper), 'Sales Tax Area' (Illinois), 'Order Source' (CMS), 'Sales Tax Rate' (6), and 'Payment Terms' (Net 45). There are also checkboxes for 'Send Invoice with Delivery?' and 'Auto-Send Order Confirmation To'.
- Summary Section (Right):** Shows 'Order Status' (New Order), 'Total Weight' (70), 'Total Cubes' (0), 'Merch Total' (\$164.87), 'Taxable Sales' (\$97.29), 'Sales Tax' (\$5.84), 'Freight' (\$3.85), 'Ppd Deposit' (\$0.00), and 'Total Due' (\$174.56).
- Entering Order Section (Bottom):** Features a table with columns for Line, Type, ItemCode, #Ordered, #Shipped, #B/O, Description, Opt, Price, Amount, Tax?, and Pri. The table lists items like 'Big Pink Lotion Soap', 'Shine Glass Clnr -ConcentrateD', 'Disinfectant Spray', 'Floor Clean', and 'Left Handed Broom'. There are also buttons for 'Edit', 'Ins', 'Del', and 'Move To'.

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.

The screenshot shows the 'Order Desk * STEP1 Supply (Chad Demo)' window. It features a menu bar (File, Edit, View) and a toolbar with buttons like 'Main Order Desk', 'Submit Order Review Issue', 'Send Quotation', 'Send Order Confirmation', 'Save Order', and 'Cancel Order'. Below the toolbar are tabs for 'Billing', 'Shipping', 'Order Notes', and 'Profit Summary'. The main area contains various input fields for bill-to information, PO number, salesperson, tax area, order source, and payment terms. A summary panel on the right shows 'Order Status' as 'New Order' and lists totals: Total Weight (70), Total Cubes (0), Merch Total (\$164.87), Taxable Sales (\$97.29), Sales Tax (\$5.84), Freight (\$3.85), Ppd Deposit (\$0.00), and Total Due (\$174.56). At the bottom, there are buttons for 'Enter/Assign Order #', 'Ready To Ship?', 'Ready To Bill?', 'Item Status', and 'Update Order Totals'. A table below lists order items with columns for Line, Type, ItemCode, #Ordered, #Shipped, #B/O, Description, Opt, Price, Amount, Tax?, and Pri. The table contains five rows of items, with the fifth item, 'Left Handed Broom', highlighted. A status bar at the bottom indicates 'Connected to Server', 'STEP1 Software v7.3526', and 'CMS'.

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 items Click on this button and let's go through some of this.

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.

Item Status Check * Big Pink Lotion Soap

File Search

Main | WebDocs | W/H Info | Pending Orders | Stock History | Item Notes | Price List Notes | CycleCount History

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**
 Ship Cubes: **0**

View Online Catalog Page

Item Cost: 3.56	MSDS Reqd? N	List: 8.91	Price	Quantity
Last Cost Chg: 16-May-2013	MSDS Code:	Brkt 2: 7.59		0
Supplier: GOJO110	HazMat? N	Brkt 3: 7.13		0
Supplier Part #: RH101	Service Item? N	Brkt 4: 6.81		0
Alt Supplier: 0	Warranty: 0	Brkt 5: 6.67		0
Alt Supp Part #:	Route/Day	Brkt 6: 6.21		0
BreakCase? N 1 From:	Carrier	Brkt 7: 5.66		0
	Taxable? Y S/N? N	Brkt 8: 5.26		0

Comments: **For Use with Pour in Soap Dispensers; Impact # 9330 / 9336 / 4020**

Stock Level: **20**
 Shipped: **0**
 Received: **0**
 Stock On-Hand: **20**
 Reserved: **0**
 Available: **20**

On Order? **N**
 Date:
 Expected:
 Qty: **0**

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** | W/H 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.

Item Status Check * Big Pink Lotion Soap

File Search

Main | WebDocs | **WH Info** | Pending Orders | Stock History | Item Notes | Price List Notes | CycleCount History

Item Description: **Big Pink Lotion Soap** Stock Level: 20
 Item Code: **RH101** Shipped: 0
 Sales Class: **B** Received: 0
 Stock Unit: **Gal** Purchase Unit: **Case** Purchase Mult: **4** Stock On-Hand: 20
Reserved: 0
Available: 20

WH Stock | WH Qty History | WH Sales History

Branch	Warehouse	BinNumber	Stock	Shipped	Received	OnHand	Reserved	Available	OnOrder?	Quantity	Expected
▶ CHICAGO	IL	1-HD	20	0	0	20	0	20	N	0	0

< >

The WH Qty 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.

Item Status Check * Big Pink Lotion Soap

File Search

Main | WebDocs | WH Info | **Pending Orders** | Stock History | Item Notes | Price List Notes | CycleCount History

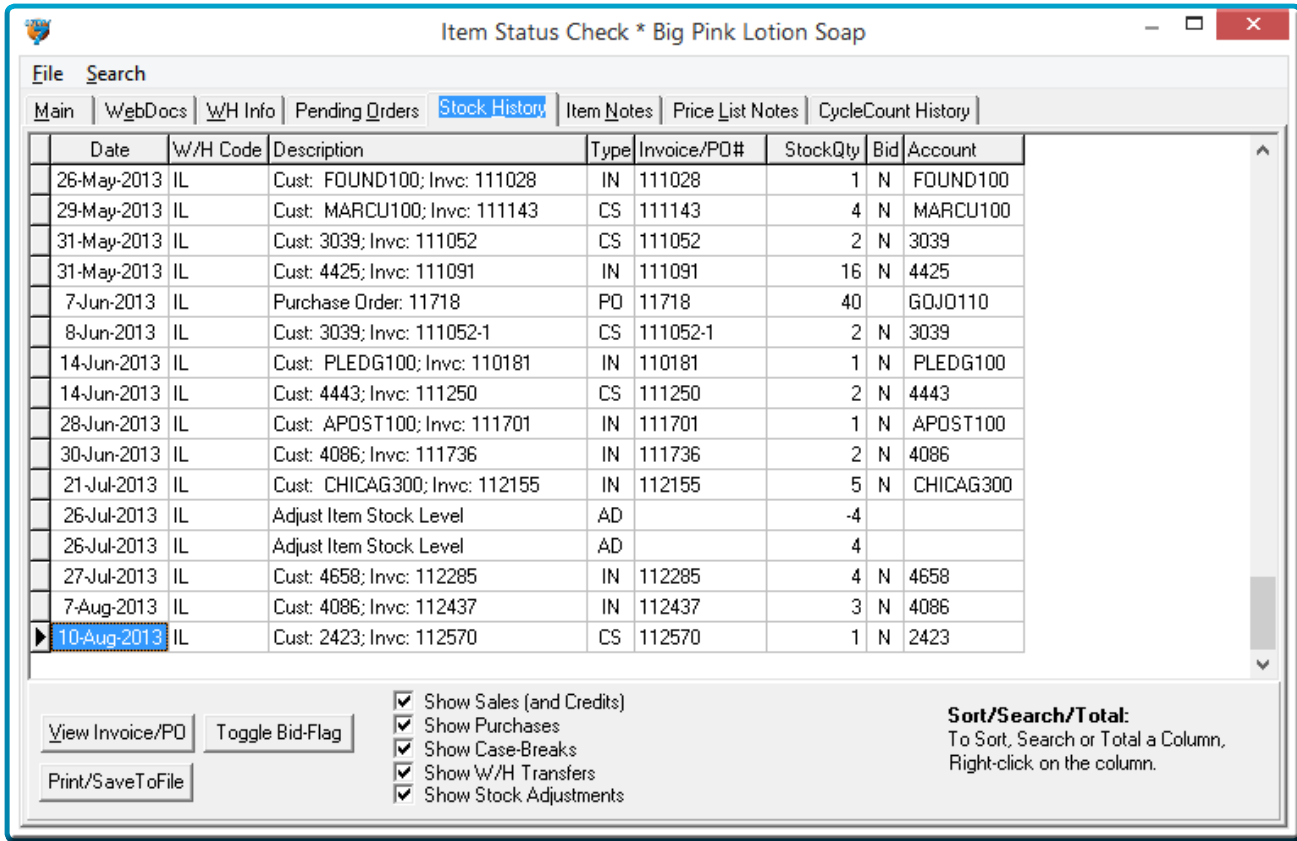
# Ordered	Customer Name	Order Date	Target Ship	Status	Ready	TruckRun	WHCode	Order #	Type	Merch Tot
▶										

< >

Show CreditHold Orders
 Show OnHold Orders
 Show DropShip Orders
 Show Quotations

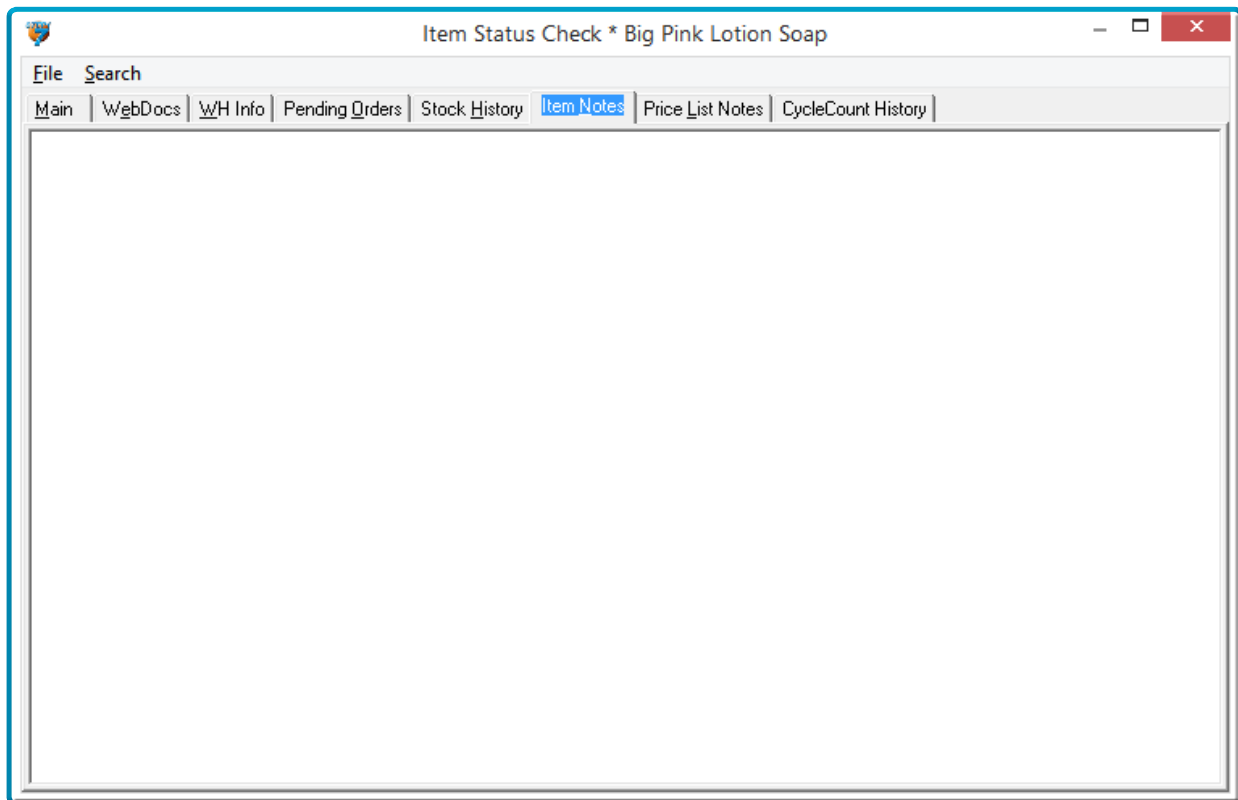
Sort/Search/Total: 0 Orders
 To Sort, Search or Total a Column, Right-click on the column.

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



Date	W/H Code	Description	Type	Invoice/PO#	StockQty	Bid	Account
26-May-2013	IL	Cust: FOUND100; Invc: 111028	IN	111028	1	N	FOUND100
29-May-2013	IL	Cust: MARCU100; Invc: 111143	CS	111143	4	N	MARCU100
31-May-2013	IL	Cust: 3039; Invc: 111052	CS	111052	2	N	3039
31-May-2013	IL	Cust: 4425; Invc: 111091	IN	111091	16	N	4425
7-Jun-2013	IL	Purchase Order: 11718	PO	11718	40		GOJO110
8-Jun-2013	IL	Cust: 3039; Invc: 111052-1	CS	111052-1	2	N	3039
14-Jun-2013	IL	Cust: PLEDG100; Invc: 110181	IN	110181	1	N	PLEDG100
14-Jun-2013	IL	Cust: 4443; Invc: 111250	CS	111250	2	N	4443
28-Jun-2013	IL	Cust: APOST100; Invc: 111701	IN	111701	1	N	APOST100
30-Jun-2013	IL	Cust: 4086; Invc: 111736	IN	111736	2	N	4086
21-Jul-2013	IL	Cust: CHICAG300; Invc: 112155	IN	112155	5	N	CHICAG300
26-Jul-2013	IL	Adjust Item Stock Level	AD		-4		
26-Jul-2013	IL	Adjust Item Stock Level	AD		4		
27-Jul-2013	IL	Cust: 4658; Invc: 112285	IN	112285	4	N	4658
7-Aug-2013	IL	Cust: 4086; Invc: 112437	IN	112437	3	N	4086
10-Aug-2013	IL	Cust: 2423; Invc: 112570	CS	112570	1	N	2423

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.



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.

The screenshot shows the 'Order Desk * STEP1 Supply (Chad Demo)' window. The 'Shipping' tab is active. The interface is divided into several sections:

- Top Menu:** File, Edit, View. Main Order Desk, Submit Order Review Issue, Send Quotation, Send Order Confirmation, Save Order, Cancel Order.
- Navigation:** Billing, Shipping (selected), Order Notes, Profit Summary.
- Ship To Information (Left):**
 - Ship To: Chicago Judicial Center, 8048 S. Exchange Ave, Suite 3349, Chicago, IL 60617.
 - Attn: (empty)
 - Instrux: (empty)
- Warehouse & Dates (Middle-Right):**
 - Warehouse: IL
 - Order Date: 1-Oct-2014
 - Ship Date: (empty)
 - Delivery Route: Local Chicao & Vacinity
 - Carrier: Best Way
 - FOB: Ship Point
 - Frt Ppd/Cot: P
- Order Summary (Right):**
 - Order Status: New Order
 - Total Weight: 70
 - Total Cubes: 0
 - Merch Total: \$139.87
 - Taxable Sales: \$72.29
 - Sales Tax: \$4.34
 - Freight: \$3.85
 - Ppd Deposit: \$0.00
 - Total Due: \$148.06
- Order Entry (Bottom):**
 - Enter/Assign Order #: (empty)
 - Ready To Ship?
 - Ready To Bill?
 - Item Status, Update Order Totals
- Product List Table:**

Line	Type	ItemCode	#Ordered	#Shipped	#B/O	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 Clnr -ConcentrateD	d10	25.20	\$25.20	N	
3	I	RA008	6	6	0	Disinfectant Spray	B8	3.91	\$23.46	N	
4	I	FLCLNCS	1	1	0	Floor Clean	d10	43.44	\$43.44	Y	
5	S		1	1	0	Left Handed Broom	S	25.00	\$25.00	Y	
- Bottom Status:** Connected to Server, STEP1 Software v7.3526, CMS

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.

Order Desk * STEP1 Supply (Chad Demo)

File Edit View

Main Order Desk Submit Order Review Issue Send Quotation Send Order Confirmation **Save Order** Cancel Order

Billing Shipping Order Notes Profit Summary

Show Order Notes when View/Modify Order?

Order Status New Order

Total Weight: 70
Total Cubes: 0
Merch Total: \$139.87
Taxable Sales: \$72.29
Sales Tax: \$4.34

\$0.00
Freight \$3.85
Ppd Deposit: \$0.00
Total Due: \$148.06

Entering Order Enter/Assign Order # Ready To Ship? Ready To Bill? Item Status Update Order Totals

Pricing Profit Detail

Line	Type	ItemCode	#Ordered	#Shipped	#B/O	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 Clnr -ConcentrateD	d10	25.20	\$25.20	N	
3	I	RA008	6	6	0	Disinfectant Spray	B8	3.91	\$23.46	N	
4	I	FLCLNCS	1	1	0	Floor Clean	d10	43.44	\$43.44	Y	
5	S		1	1	0	Left Handed Broom	S	25.00	\$25.00	Y	

Connected to Server STEP1 Software v7.3526 CMS

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.

Order Desk * STEP1 Supply (Chad Demo)

File Edit View

Main Order Desk Submit Order Review Issue Send Quotation Send Order Confirmation **Save Order** Cancel Order

Billing Shipping Order Notes **Profit Summary**

Total Sales:	\$139.87	Comm Sales:	\$139.87
Pub Profit:	\$59.01	Comm Profit:	\$59.01
Pub Margin%:	42.2	Comm Margin%:	42.2

Order Status: New Order

Total Weight: 70
Total Cubes: 0

Merch Total: \$139.87
Taxable Sales: \$72.29
Sales Tax: \$4.34

\$0.00
Freight: \$3.85
Ppd Deposit: \$0.00
Total Due: \$148.06

Entering Order Enter/Assign Order # Ready To Ship? Ready To Bill? Update Order Totals

Pricing Profit Detail

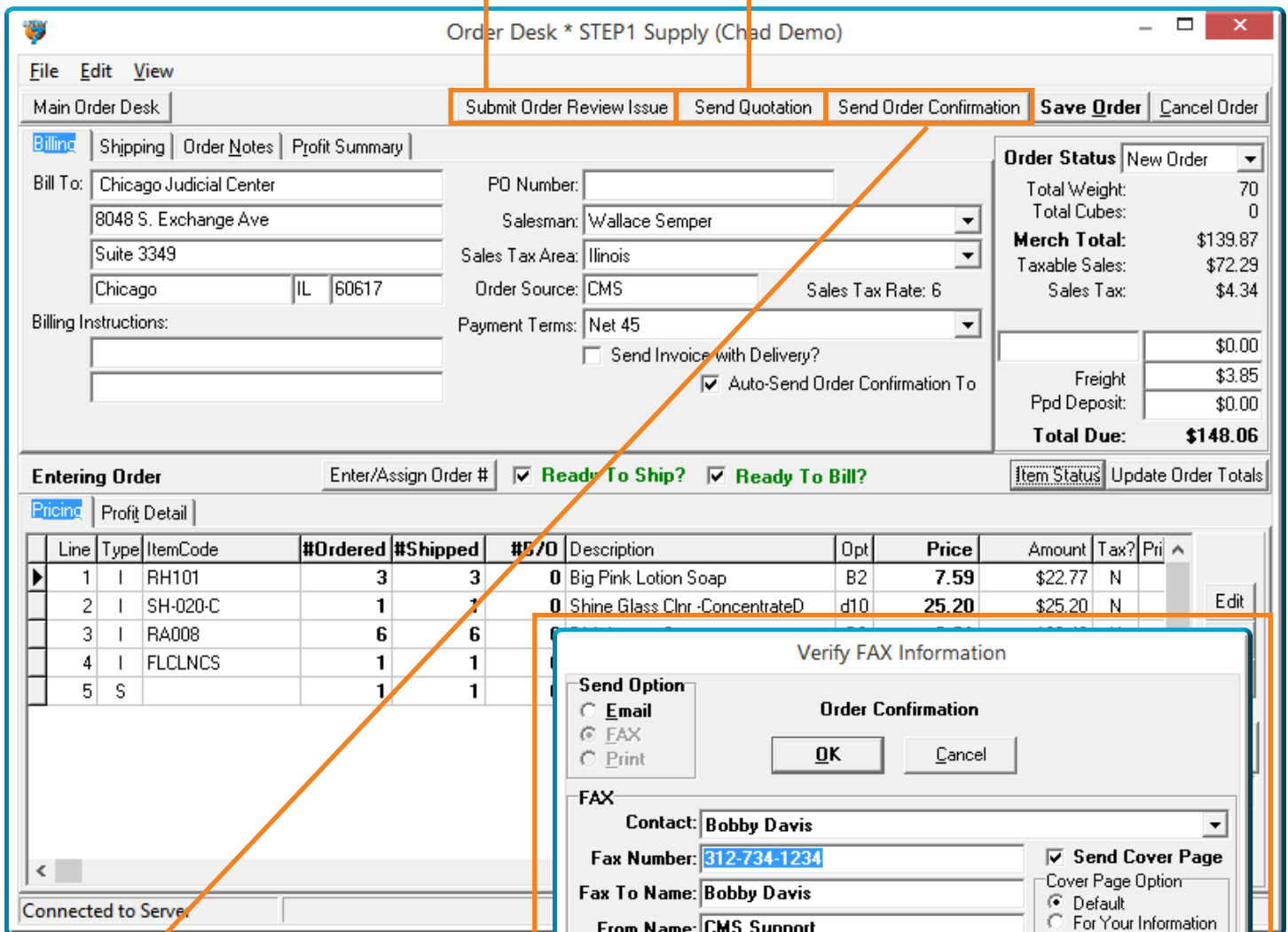
Line	Type	ItemCode	#Ordered	#Shipped	#B/O	Description	Opt	Price	Amount	Tax?	Pri
1	I	RH101	3	3	0	Big Pink Lotion Soap	B2	7.59	\$22.77	N	
2	I	SH-020-C	1	1	0	Shine Glass Clnr -ConcentrateD	d10	25.20	\$25.20	N	
3	I	RA008	6	6	0	Disinfectant Spray	B8	3.91	\$23.46	N	
4	I	FLCLNCS	1	1	0	Floor Clean	d10	43.44	\$43.44	Y	
5	S		1	1	0	Left Handed Broom	S	25.00	\$25.00	Y	

Connected to Server STEP1 Software 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 button is discussed in the Order Review Training Guide.

The Send Quotation button is discussed later in this guide in the Creating a quote section.



The Send Order Confirmation button opens a new window in which you can select a method for sending, the contact you want it sent to, leave comments on the cover page & more.

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.

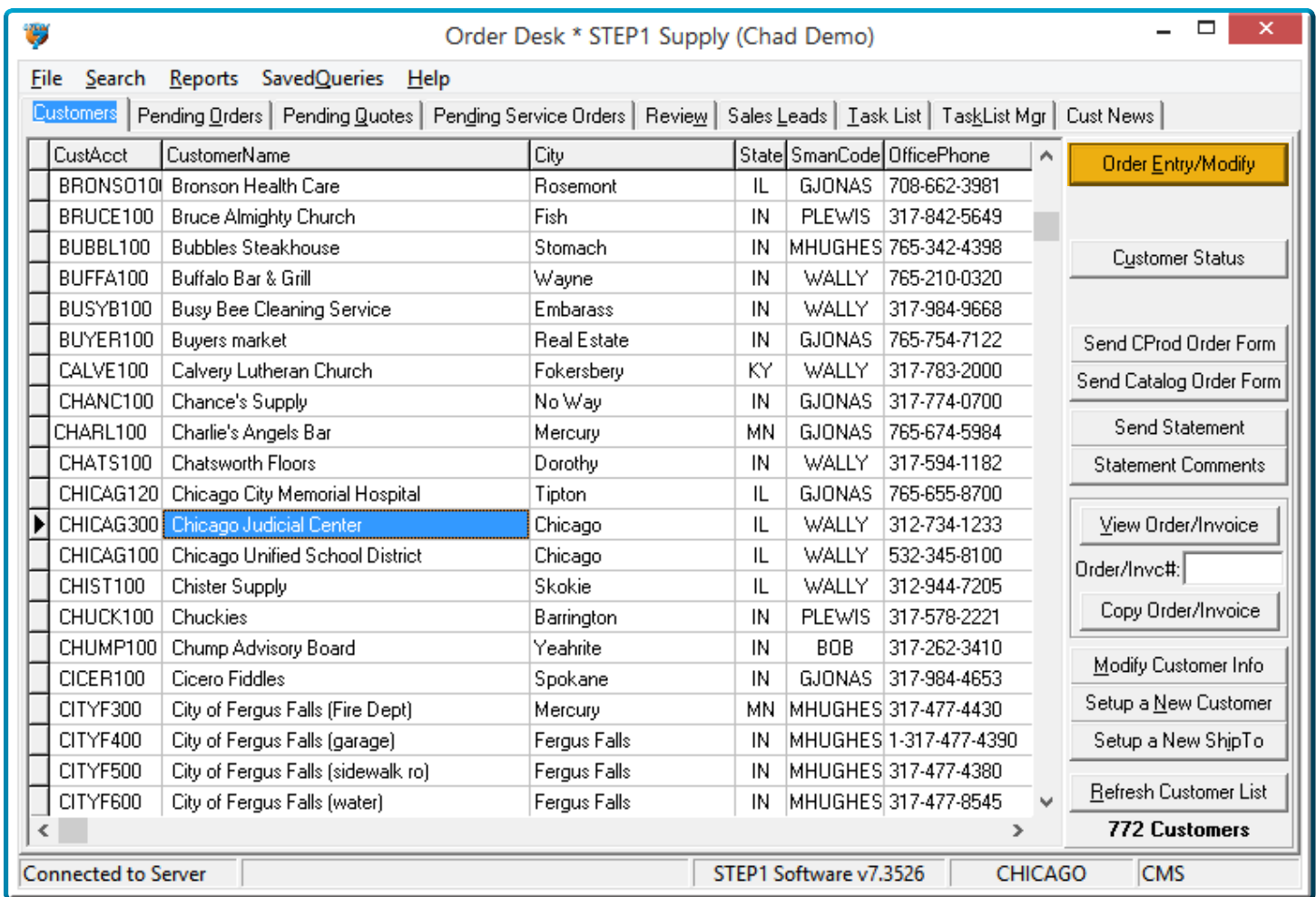
In the very top-right corner are the Save Order & Cancel Order buttons. These I think are self-explanatory. Click on the Save Order button now and we are done with this section of the guide.

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

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

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

Chicago Judicial Center and Click "Order Entry/Modify"



The screenshot shows the 'Order Desk * STEP1 Supply (Chad Demo)' application window. The 'Customers' tab is active, displaying a list of customers. The 'Chicago Judicial Center' (CustAcct: CHICAG300) is selected. The 'Order Entry/Modify' button is highlighted in yellow. The interface includes a menu bar, a toolbar with various options like 'Pending Orders' and 'Sales Leads', and a status bar at the bottom showing 'Connected to Server', 'STEP1 Software v7.3526', 'CHICAGO', and 'CMS'.

CustAcct	CustomerName	City	State	SmanCode	OfficePhone
BRNSO10	Bronson Health Care	Rosemont	IL	GJONAS	708-662-3981
BRUCE100	Bruce Almighty Church	Fish	IN	PLEWIS	317-842-5649
BUBBL100	Bubbles Steakhouse	Stomach	IN	MHUGHES	765-342-4398
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
CALVE100	Calvery Lutheran Church	Fokersbery	KY	WALLY	317-783-2000
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
CHICAG120	Chicago City Memorial Hospital	Tipton	IL	GJONAS	765-655-8700
▶ CHICAG300	Chicago Judicial Center	Chicago	IL	WALLY	312-734-1233
CHICAG100	Chicago Unified School District	Chicago	IL	WALLY	532-345-8100
CHIST100	Chister Supply	Skokie	IL	WALLY	312-944-7205
CHUCK100	Chuckies	Barrington	IN	PLEWIS	317-578-2221
CHUMP100	Chump Advisory Board	Yeahrite	IN	BOB	317-262-3410
CICER100	Cicero Fiddles	Spokane	IN	GJONAS	317-984-4653
CITYF300	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
CITYF500	City of Fergus Falls (sidewalk ro)	Fergus Falls	IN	MHUGHES	317-477-4380
CITYF600	City of Fergus Falls (water)	Fergus Falls	IN	MHUGHES	317-477-8545

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.

Order Desk * STEP1 Supply (Chad Demo)

Chicago Judicial Center **View Current Order** | Modify Customer Info | Customer Status | Customer WebSite | Exit

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: **WALLY** Ship Address 1: 8048 S. Exchange Ave
 Bill Address 2: **Suite 3349** Price Opt: **d10** Ship Address 2: Suite 3349
 City, State, Zip: **Chicago IL 60617** Route/Day **Chgo/Tue** City, State, Zip: Chicago IL 60617
 Contact: **Bobby Davis** Carrier **Truck 2** Ship Attention:
 Telephone: **312-734-1233** Sales Tax? **Y** Corp Acct: **JUDICAL**
 FAX: **312-734-1234** Tax Freight? **N** Corp Dept: **C-JUD**
 Terms: **Net 45** Charge Freight? **Y** Pmt Group:
 Resale #: **Ill 26-0799-87** Age Status: **Hid** CPM Class: **City**
 Comments: **Always call before shipping** Sales Class: **A**
Contact Maxine (ex 201) Calc Class: **B**
with any credit issues Market Group: **GOVT**

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

ItemCode	T	C	CPDescription	CurrentPrice	PriceSource	Last Price	LastSaleDate	Last Qty	SubCatCode	Cus
01915-12	I	A	Super Lemon Plus Degreaser 8oz	58.80	d10 Cust	35.00	1-Sep-2013	3	10-AIRFR	
01961	I	B	Urinal Screen w/Block,Cherry	2.14	d10 Cust	1.73	15-May-2013	24	10-DEDDO	
01ADV-5321	M	C	Advance BA 5321 Auto Scrubber	7,395.75	d10 Cust				30-FLOOR	
0420-55	I	C	Film Free Glass Cleaner	390.57	B6 CProd	390.57	15-May-2013	0	10-GLASS	
06143	I	C	First Choice Carpet Pre-Spray	14.83	B5 CProd	14.83	15-May-2013	2	10-CARPE	
07531L	I	B	Stratus 3 Dispenser	20.99	S CProd	20.99	1-Sep-2013	38	10-AIRFZ	
101000	I	A	Spartan Shinline Seal 5gal	69.10	d10 Cust	65.00	15-Nov-2014	12	10-LAUND	
140	I	A	Dazzle Floor Finish	100.65	d10 Cust	69.96	5-Dec-2012	1	10-FLOOR	JUD-14
162	I	B	Pristine II Cleaner/Sealer	52.00	B5 CProd	52.00	8-May-2013	4	10-FLOOR	
190108	I	A	26" Front Mount Squeege Kit	0.00	S CProd	0.00	1-Sep-2013	1	30-VACZZ	
20BLK	I	B	20" Black Strip Pad	21.04	B6 CProd	21.04	27-Jan-2013	5	40-PADFL	
20WHI	I	A	20" White Polish Pad	21.04	B6 CProd	21.04	27-Jan-2013	5	40-PADFL	
251	I	C	Enhance Cleaner/Maintainer	51.68	d10 Cust	36.55	21-Jul-2013	3	10-FLOOR	

Order Desk * STEP1 Supply (Chad Demo)

File Edit View

Main Order Desk | Submit Order Review Issue | Send Quotation | Send Order Confirmation | **Save Order** | Cancel Order

Bill To: Chicago Judicial Center PO Number: **RETURN** Order Status: New Order
 8048 S. Exchange Ave Salesman: Wallace Semper Total Weight: -9
 Suite 3349 Sales Tax Area: Illinois Total Cubes: 0
 Chicago IL 60617 Order Source: CMS Sales Tax Rate: 6 **Merch Total:** (\$7.59)
 Billing Instructions: Payment Terms: Net 45 Taxable Sales: \$0.00
 Sales Tax: \$0.00
 Freight: \$0.00
 Ppd Deposit: \$0.00
Total Due: (\$7.59)

Entering Order | Enter/Assign Order # | Ready To Ship? | Ready To Bill? | Item Status | Update Order Totals

Line	Type	ItemCode	#Ordered	#Shipped	#B/D	Description	Opt	Price	Amount	Tax?	PrintID
1	I	RH101	-1	-1	0	Big Pink Lotion Soap	B2	7.59	(\$7.59)	N	

Connected to Server | STEP1 Software v7.3526 | CMS

The First thing you need to do on this screen is give this order a PO number of "RETURN", or whatever your company would normally call this.

Also Notice that the total amount due is negative \$7.59 because of the negative quantity we ordered.

Note: You may need to zero out 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.)

Select Invoice to Apply Credit Memo To

File	Search	Invoice #	Invc Date	Due Date	Type	Invc Amt	Amt Due	Status
		112155-1	7-Aug-2013	6-Sep-2013	IN	\$187.68	\$187.68	Delinquent
		112952	1-Sep-2013	1-Oct-2013	IN	\$14,043.15	\$14,043.15	Delinquent
		▶ 113099	6-Oct-2014	20-Nov-2014	IN	\$148.06	\$148.06	Current

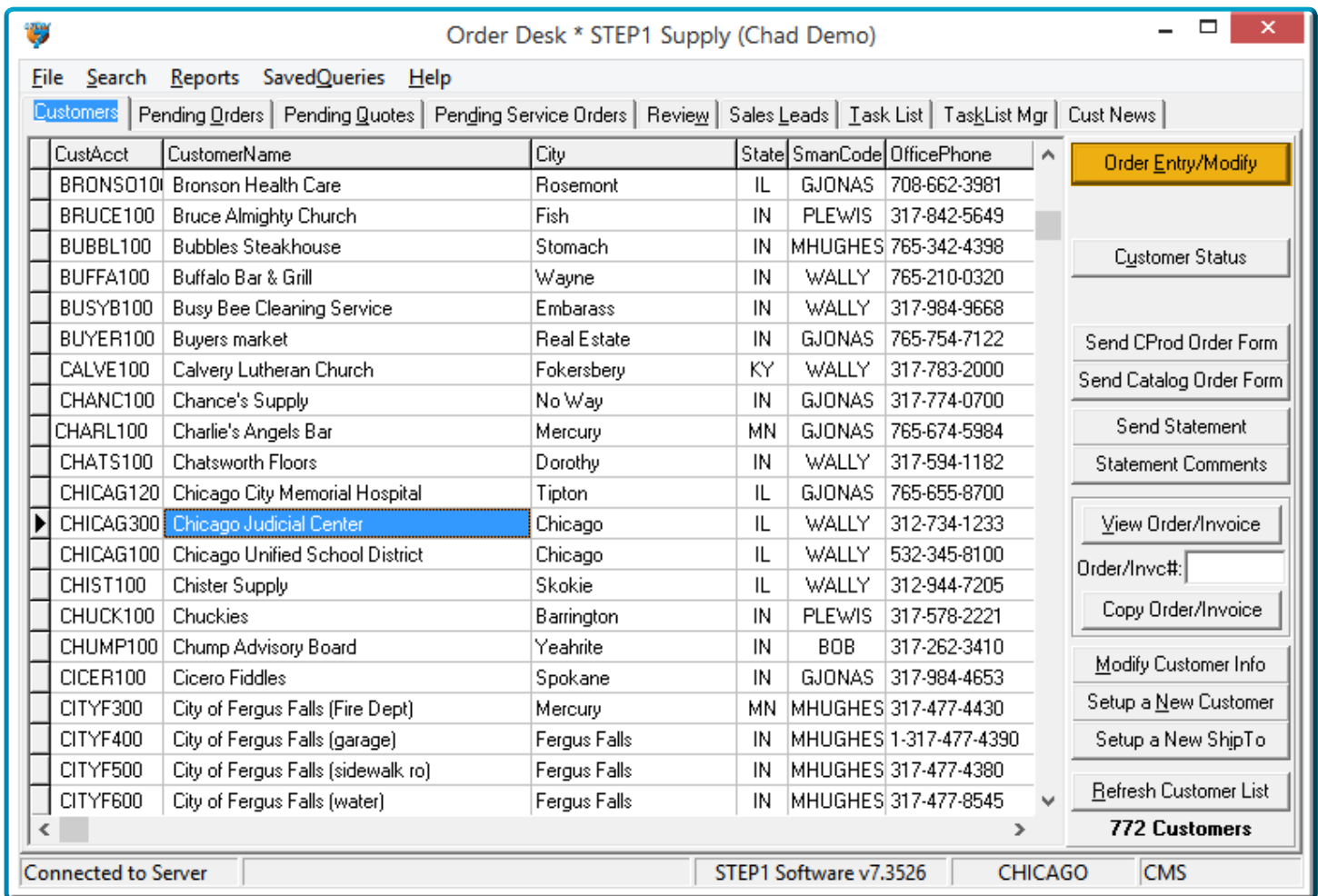
Click this button to Select the Invoice For Credit and your done! Now STEP1 has credited the customer the amount needed without voiding the original invoice so you have a clean record of exactly what happened. STEP1 has also put the item back into your available inventory.

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 Judicial 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 Judicial Center and Click "Order Entry/Modify"



The screenshot shows the 'Order Desk * STEP1 Supply (Chad Demo)' window. The 'Customers' tab is active, displaying a list of customers. The 'Chicago Judicial Center' (CustAcct: CHICAG300) is selected. The 'Order Entry/Modify' button is highlighted in yellow. The interface includes a menu bar (File, Search, Reports, Saved Queries, Help), a navigation bar (Customers, Pending Orders, Pending Quotes, Pending Service Orders, Review, Sales Leads, Task List, Task List Mgr, Cust News), and a status bar at the bottom showing 'Connected to Server', 'STEP1 Software v7.3526', 'CHICAGO', and 'CMS'.

CustAcct	CustomerName	City	State	SmanCode	OfficePhone
BRONSO100	Bronson Health Care	Rosemont	IL	GJONAS	708-662-3981
BRUCE100	Bruce Almighty Church	Fish	IN	PLEWIS	317-842-5649
BUBBL100	Bubbles Steakhouse	Stomach	IN	MHUGHES	765-342-4398
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
CALVE100	Calvery Lutheran Church	Fokersbery	KY	WALLY	317-783-2000
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
CHICAG120	Chicago City Memorial Hospital	Tipton	IL	GJONAS	765-655-8700
▶ CHICAG300	Chicago Judicial Center	Chicago	IL	WALLY	312-734-1233
CHICAG100	Chicago Unified School District	Chicago	IL	WALLY	532-345-8100
CHIST100	Chister Supply	Skokie	IL	WALLY	312-944-7205
CHUCK100	Chuckies	Barrington	IN	PLEWIS	317-578-2221
CHUMP100	Chump Advisory Board	Yeahrite	IN	BOB	317-262-3410
CICER100	Cicero Fiddles	Spokane	IN	GJONAS	317-984-4653
CITYF300	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
CITYF500	City of Fergus Falls (sidewalk ro)	Fergus Falls	IN	MHUGHES	317-477-4380
CITYF600	City of Fergus Falls (water)	Fergus Falls	IN	MHUGHES	317-477-8545

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.

Order Desk * STEP1 Supply (Chad Demo)

File Edit Search View Reports Help

Chicago Judicial Center View Current Order Modify Customer Info Customer Status Customer WebSite Exit

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: **WALLY** Ship Address 1: 8048 S. Exchange Ave
 Bill Address 2: **Suite 3349** Price Opt: **d10** Ship Address 2: Suite 3349
 City, State, Zip: **Chicago IL 60617** Route/Day **Chgo/Tue** City, State, Zip: Chicago IL 60617
 Contact: **Bobby Davis** Carrier **Truck 2** Ship Attention:
 Telephone: **312-734-1233** Sales Tax? **Y** Corp Acct: **JUDICAL**
 FAX: **312-734-1234** Tax Freight? **N** Corp Dept: **C-JUD**
 Terms: **Net 45** Charge Freight? **Y** Pmt Group:
 Resale #: **Ill 26-0799-87** Age Status: **Hid** CPM Class: **City**
 Comments: **Always call before shipping** Sales Class: **A**
Contact Maxine (ex 201) Calc Class: **B**
with any credit issues Market Group: **GOVT**

Current Order Summary: 2 Lines (\$16.02) Total Add Item to Order Item Status Qty Sold History Price History

Customer Products Due for ReOrder Inventory Items Sale Items

SubCategory Description (DoubleClick to Select)	Code	ItemCode	Typ	Cls	ItemDescription	ItemExtendedDescrip
All Inventory Items (2554)		0420	I		Film Free Glass Cleaner	
CHEM: Aerosols (21)	10-AERDS	0420-55	I	C	Film Free Glass Cleaner	
CHEM: Air Fresheners (31)	10-AIRFR	A050	I		Glass Plus	
CHEM DISPENSER: Air Freshener (3)	10-AIRFZ	SHINE-RTU	I		Shine Glass Cleaner -RTU	
CHEM: All Purpose Cleaners (9)	10-ALLPU	30116	I		Squeege-Off Concentrate	
CHEM: Automotive (4)	10-AUTO	30016	I		Squeege-Off Powder	
CHEM: Carpet Care (73)	10-CARPE	30160	I		Water Spot Remover Paste	
CHEM: Concentrate (25)	10-CONCE					
CHEM: Degreasers (25)	10-DEGRE					
CHEM: Deodorizers (36)	10-DEODD					
CHEM: Disinfectants (6)	10-DISIN					
CHEM: Finish/Clnr/Seal/Strip (74)	10-FLOOR					
CHEM: Food Service. (34)	10-FOODS					
CHEM: Glass Cleaners (7)	10-					
CHEM: Hand Soaps (77)	10-					
CHEM DISPENSER: Hand Soap (30)	10-					
CHEM: Ice Melters (5)	10-					

Show Item Type(s)
 Stock Items (I)
 Non-Stock (N)
 Labor Items (L)
 Kits (K)
 Machines (M)
 Parts (P)
 Show Discontinued?
 (SalesClass = 'X')

Now click on the View Current Order button to look at the order. Notice that the Order Total is reflecting the difference in price between the items.

Order Desk * STEP1 Supply (Chad Demo)

File Edit View

Main Order Desk Submit Order Review Issue Send Quotation Send Order Confirmation Save Order Cancel Order

Billing Shipping Order Notes Profit Summary

Bill To: Chicago Judicial Center PO Number: Salesman: Wallace Semper
 8048 S. Exchange Ave Sales Tax Area: Illinois
 Suite 3349 Order Source: CMS Sales Tax Rate: 6
 Chicago IL 60617 Payment Terms: Net 45
 Billing Instructions: Send Invoice with Delivery?
 Auto-Send Order Confirmation To

Order Status: New Order
 Total Weight: -35
 Total Cubes: 0
Merch Total: (\$16.02)
 Taxable Sales: (\$12.17)
 Sales Tax: (\$0.73)
 Freight: \$0.00
 Ppd Deposit: \$0.00
Total Due: (\$12.90)

Entering Order Enter/Assign Order # Ready To Ship? Ready To Bill? Item Status Update Order Totals

Price Profit Detail

Line	Type	ItemCode	#Ordered	#Shipped	#B/O	Description	Opt	Price	Amount	Tax?	Pri
1	I	SHINE-RTU	-1	-1	0	Shine Glass Cleaner -RTU	d10	23.04	(\$23.04)	Y	
2	I	A050	1	1	0	Glass Plus	d10	7.02	\$7.02	Y	

Connected to Server STEP1 Software v7.3526 CMS

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

Order Desk * STEP1 Supply (Chad Demo)

File Edit View

Main Order Desk Submit Order Review Issue Send Quotation Send Order Confirmation **Save Order** Cancel Order

Billing Shipping Order Notes Profit Summary

Bill To: Chicago Judicial Center PO Number: 8048 S. Exchange Ave Salesman: Wallace Semper Suite 3349 Sales Tax Area: Illinois Chicago IL 60617 Order Source: CMS Sales Tax Rate: 6 Billing Instructions: Payment Terms: Net 45

Send Invoice with Delivery? Auto-Send Order Confirmation To

Order Status: New Order

Total Weight: -35
Total Cubes: 0
Merch Total: (\$16.02)
Taxable Sales: (\$12.17)
Sales Tax: (\$0.73)

Freight: \$0.00
Ppd Deposit: \$3.85
Total Due: (\$12.90)

Entering Order Enter/Assign Order # Ready To Ship? Ready To Bill? Item Status Update Order Totals

Pricing Profit Detail

Line	Type	ItemCode	#Ordered	#Shipped	#B/O	Description	Opt	Price	Amount	Tax?	Pri
1	I	SHINE-RTU	-1	-1	0	Shine Glass Cleaner -RTU	d10	23.04	(\$23.04)	Y	
2	I	A050	1	1	0	Glass Plus	d10	7.02	\$7.02	Y	

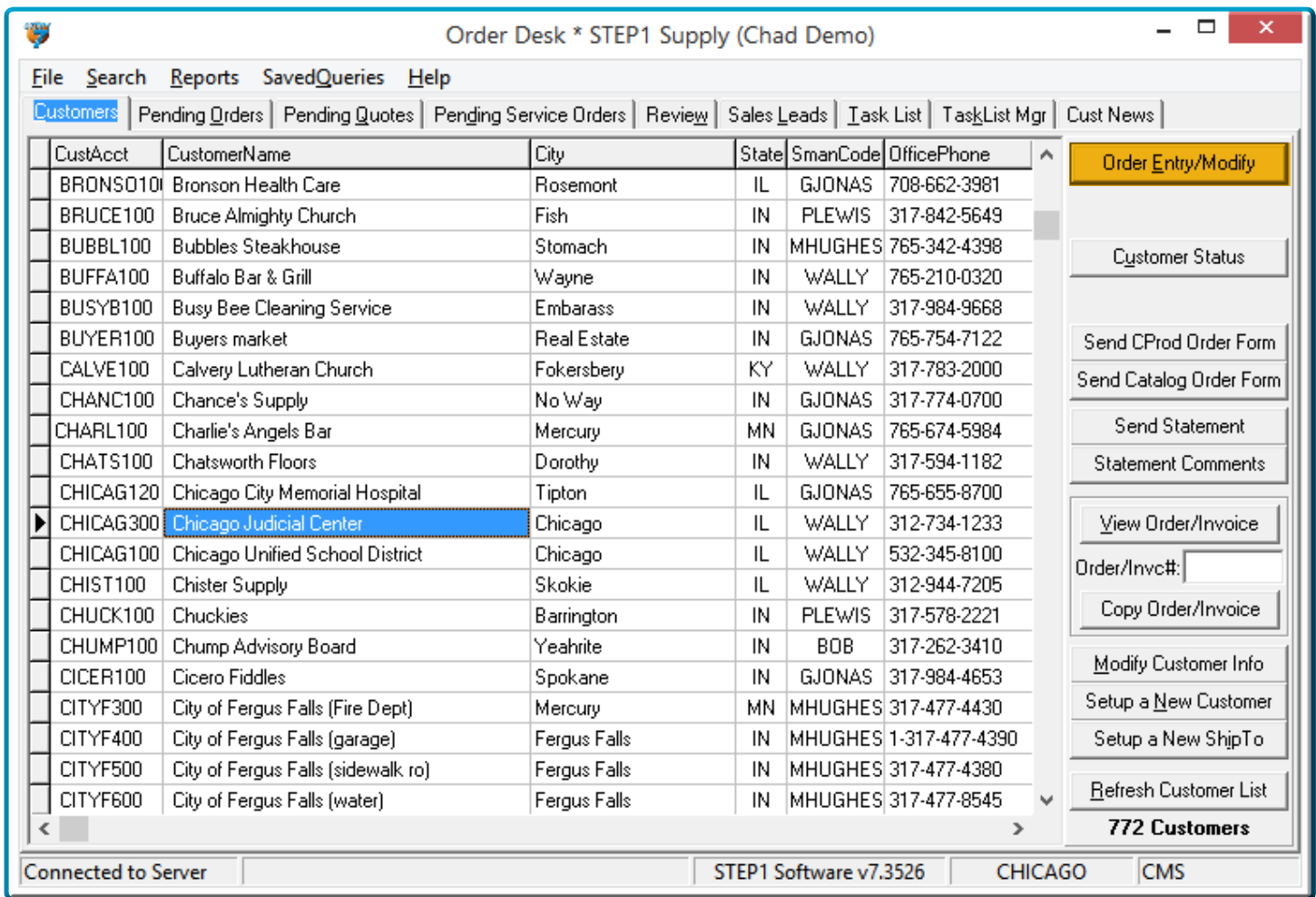
Connected to Server STEP1 Software v7.3526 CMS

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 Judicial 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 Judicial Center and Click "Order Entry/Modify".



The screenshot shows the 'Order Desk * STEP1 Supply (Chad Demo)' window. The 'Customers' tab is active, displaying a list of customers. The 'Chicago Judicial Center' (CustAcct: CHICAG300) is selected. The right-hand panel shows the 'Order Entry/Modify' button highlighted in yellow. Other buttons include 'Customer Status', 'Send CProd Order Form', 'Send Catalog Order Form', 'Send Statement', 'Statement Comments', 'View Order/Invoice', 'Copy Order/Invoice', 'Modify Customer Info', 'Setup a New Customer', 'Setup a New ShipTo', and 'Refresh Customer List'. The status bar at the bottom indicates 'Connected to Server', 'STEP1 Software v7.3526', 'CHICAGO', and 'CMS'.

CustAcct	CustomerName	City	State	SmanCode	OfficePhone
BRNSO101	Bronson Health Care	Rosemont	IL	GJONAS	708-662-3981
BRUCE100	Bruce Almighty Church	Fish	IN	PLEWIS	317-842-5649
BUBBL100	Bubbles Steakhouse	Stomach	IN	MHUGHES	765-342-4398
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
CALVE100	Calvery Lutheran Church	Fokersbery	KY	WALLY	317-783-2000
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
CHICAG120	Chicago City Memorial Hospital	Tipton	IL	GJONAS	765-655-8700
▶ CHICAG300	Chicago Judicial Center	Chicago	IL	WALLY	312-734-1233
CHICAG100	Chicago Unified School District	Chicago	IL	WALLY	532-345-8100
CHIST100	Chister Supply	Skokie	IL	WALLY	312-944-7205
CHUCK100	Chuckies	Barrington	IN	PLEWIS	317-578-2221
CHUMP100	Chump Advisory Board	Yeahrite	IN	BOB	317-262-3410
CICER100	Cicero Fiddles	Spokane	IN	GJONAS	317-984-4653
CITYF300	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
CITYF500	City of Fergus Falls (sidewalk ro)	Fergus Falls	IN	MHUGHES	317-477-4380
CITYF600	City of Fergus Falls (water)	Fergus Falls	IN	MHUGHES	317-477-8545

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.

Order Desk * STEP1 Supply (Chad Demo)

File Edit Search View Reports Help

Chicago Judicial Center View Current Order Modify Customer Info Customer Status Customer WebSite Exit

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: **WALLY** Ship Address 1: 8048 S. Exchange Ave
 Bill Address 2: **Suite 3349** Price Opt: **d10** Ship Address 2: Suite 3349
 City,State,Zip: **Chicago IL 60617** Route/Day **Chgo/Tue** City,State,Zip: Chicago IL 60617
 Contact: **Bobby Davis** Carrier **Truck 2** Ship Attention:
 Telephone: **312-734-1233** Sales Tax? **Y** Corp Acct: **JUDICAL**
 FAX: **312-734-1234** Tax Freight? **N** Corp Dept: **C-JUD**
 Terms: **Net 45** Charge Freight? **Y** Pmt Group:
 Resale #: **Ill 26-0799-87** AgeStatus: **Hid** CPM Class: **City**
 Comments: **Always call before shipping** Sales Class: **A**
Contact Maxine (ex 201) Calc Class: **B**
with any credit issues Market Group: **GOVT**

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** Reference Items Sale Items

SubCategory Description (DoubleClick to Select)	Code	ItemCode	Typ	Cls	ItemDescription	ItemExtendedDescrip
TOOLS: Strip Shoes (8)	40-SHOES	1358BE	I		13qt Wastebasket	
TOOLS: Signs (11)	40-SIGNS	1358BK	I		13qt Wastebasket	
TOOLS: Sponges (9)	40-SPONG	1358GY	I		13qt Wastebasket	
TOOLS: Sprayers & Drum Pumps (32)	40-SPRAY	2914BK	I		14qt UL Classified Wastebasket	
TOOLS: Window Cleaning Equ. (68)	40-WINDO	2914SD	I		14qt UL Classified Wastebasket	
TOOLS: Miscellaneous (22)	40-ZZZZZ	1425	I		24 Gallon Round Container	
FIXT: Organizers & Shelves (4)	50-ORGNZ	2927SD	I		27qt UL Clasified Wastebasket	
FIXT: Proportioners - Chemical (6)	50-PROPO	2927BK	I		27qt UL Classified Wastebasket	
▶ FIXT: Receptacles (42)	50-RECEP	▶ 2927BN	I		27qt UL Classified Wastebasket	
FIXT: Restroom Fixtures/Dryers (2)	50-RESTR	2818BE	I	D	28 qt Wastebasket	
FIXT: Miscellaneous (1)	50-ZZZZZ	2543	I		28qt wastebasket	
PARTS: Advance (8)	90-ADVAN	2818GY	I		28qt Wastebasket	
PARTS: Briggs & Stratton Engine (49)	90-B & S	2818BK	I		28qt Wastebasket, Black	
PARTS: Batteries (10)	90-BATT	0RBR32	I		32 Gallon Atlas Container	
					32 Gallon Huskee Container	
					32 Gallon Huskee Lid	

Stock Items (I)
 Non-Stock (N)
 Labor Items (L)
 Kits (K)
 Machines (M)
 Parts (P)
 Show Discontinued?
 (SalesClass = 'X')

Refresh Item List

40 Items

STEP1 Software v7.3526 CMS

Add Item to Order

Item: 32 Gallon Huskee Container Code: 3200GY
 Type: I

IL Stock Info	Price Information:
Stock Level: 0	Price Quantity
Shipped: 0	List: 38.21
Received: 0	Brkt 2: 30.54 0
On-Hand: 0	Brkt 3: 26.77 0
Reserved: 0	Brkt 4: 25.52 0
Available: 0	Brkt 5: 24.87 0
On Order? N	Brkt 6: 24.87 0
Expected:	Brkt 7: 22.93 0
Qty On Order:	Brkt 8: 21.67 0
View All Warehouse Stocks	Sale? N 31-Dec-99

Quantity: Stock Unit: Each
 Price: Price Unit: Each

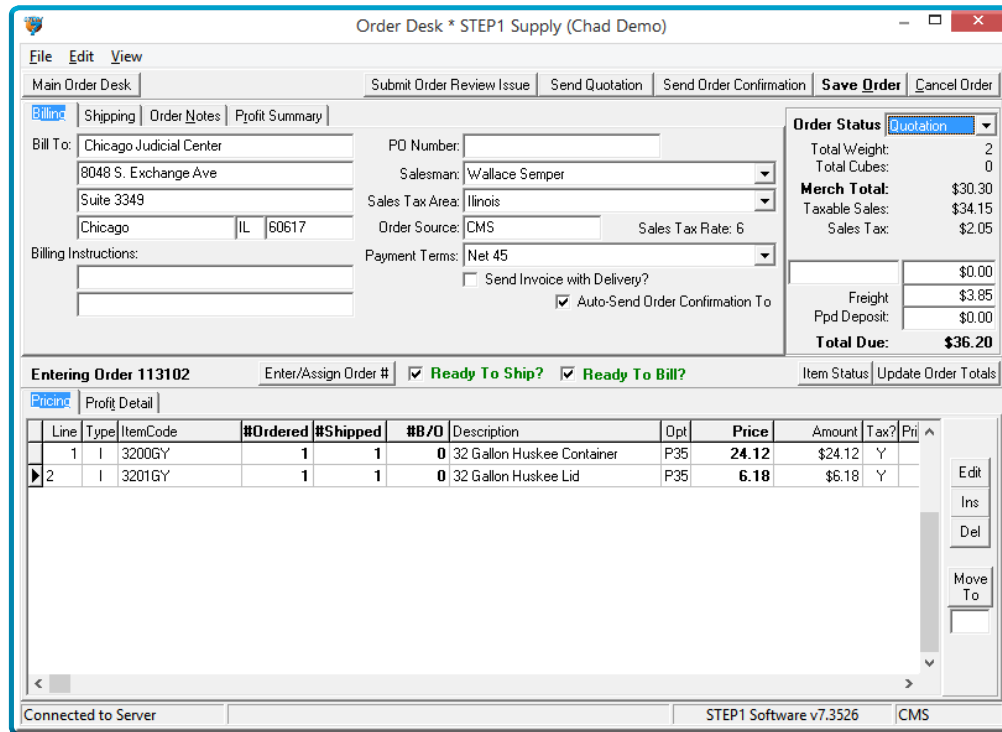
Price Opt: **P35** Charge Sales Tax?
 One-Time Price?

But instead of using b1 or list price, which is the default for items not purchased by the customer already, we want to make 35 points of margins on this order. To do this we want to highlight the price field (in the Add Item window) and type in P35 instead of a price. What this does is tells the system to use the cost of the item to figure out what price is needed to get 35 points of margin. Do this for both the container and the lid line items and you will get your 35 points of margin.

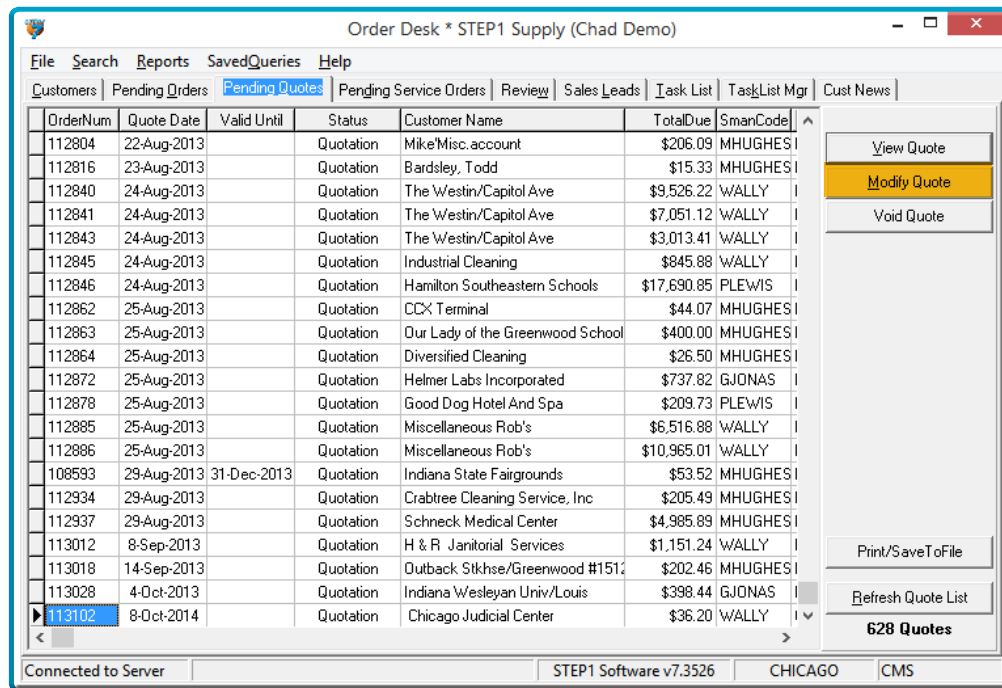
Now that your items are added, click the View Current Order button. Verify that your margin is there by clicking the Profit Detail tab which is on the left side of your screen next to the pricing tab. At the top of your screen is a button called Send Quotation. Click it to send this quote to whichever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

The screenshot shows the 'Order Desk * STEP1 Supply (Chad Demo)' application window. The main interface includes a menu bar (File, Edit, View), a toolbar with buttons like 'Send Quotation', and several tabs: 'Billing', 'Shipping', 'Order Notes', and 'Profit Summary'. The 'Billing' tab is active, showing fields for 'Bill To' (Chicago Judicial Center), 'PO Number', 'Salesman' (Wallace Semper), 'Sales Tax Area' (Illinois), 'Order Source' (CMS), and 'Payment Terms' (Net 45). A summary box on the right shows 'Order Status' as 'New Order' and 'Total Due' as '\$36.20'. Below this is an 'Entering Order' section with checkboxes for 'Ready To Ship?' and 'Ready To Bill?'. A table below lists items: '32 Gallon Huskee Container' and '32 Gallon Huskee Lid'. Overlaid on this is a 'Verify FAX Information' dialog box. The dialog has a 'Send Option' section with 'FAX' selected, a 'Quotation' title, and fields for 'Contact' (Bobby Davis), 'Fax Number' (312-734-1234), 'Fax To Name' (Bobby Davis), 'From Name' (CMS Support), and 'Subject' (Quotation 113102). It also has a 'Send Cover Page' section with 'Default' selected and a 'Confirm Successful Fax (via Email)' checkbox checked.

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.



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.

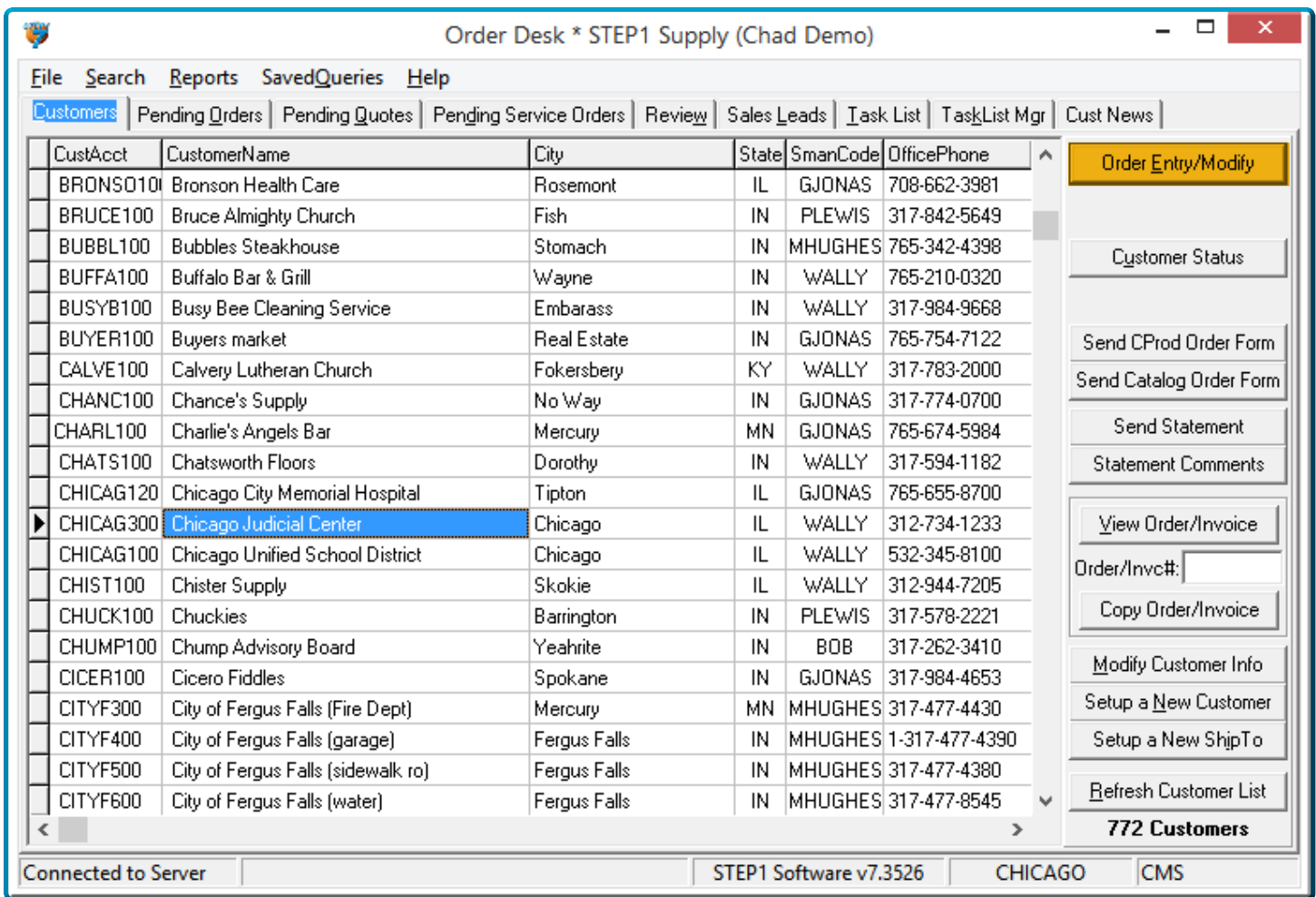


Change the order status back to new order by selecting it in the drop box and save. This is no longer a quote, it is now a new order and can be found in the customers pending order list.

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

Chicago Judicial 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.

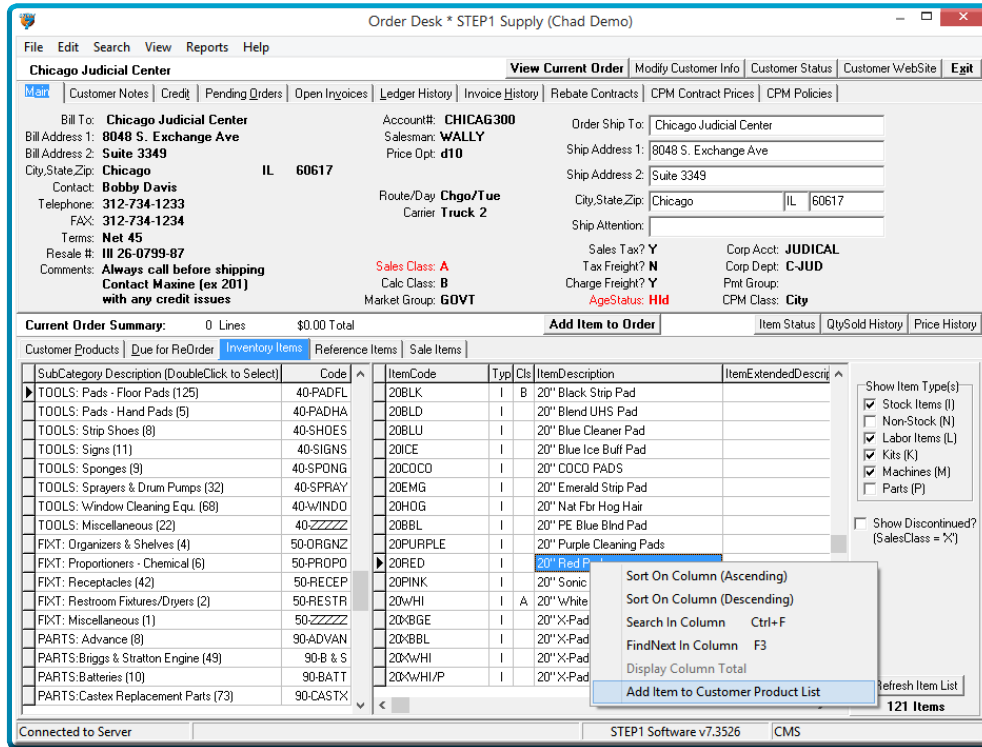
Once you've opened the Order Desk Module, Click on the Customers tab and zoom to: Chicago Judicial Center and Click "Order Entry/Modify"



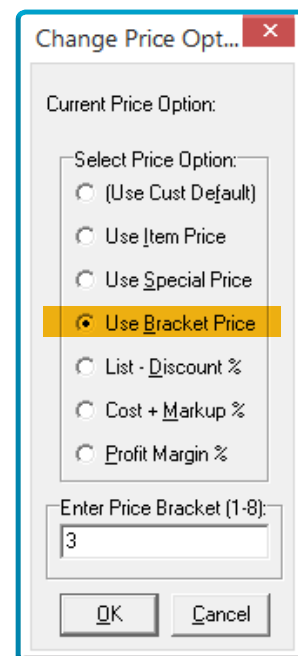
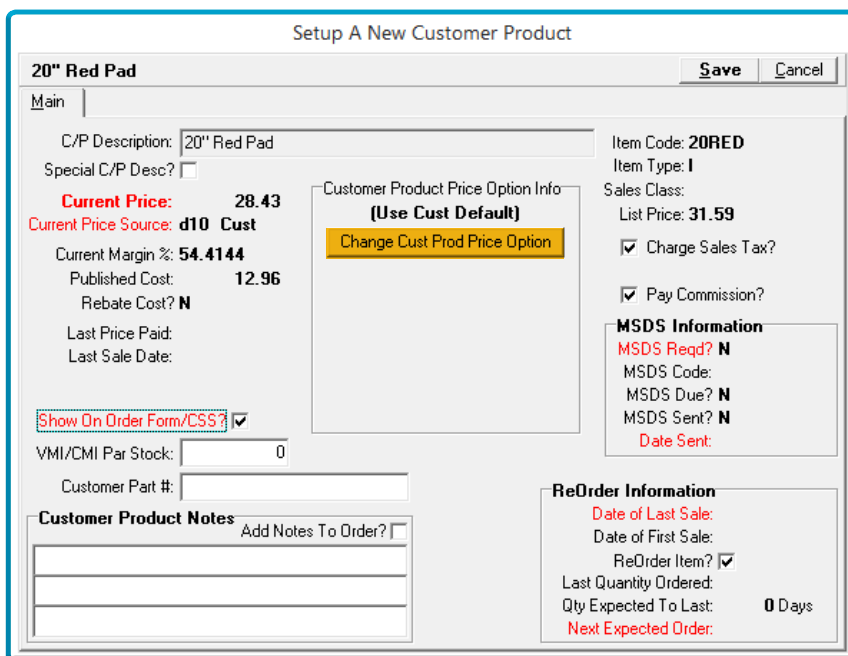
The screenshot shows the 'Order Desk * STEP1 Supply (Chad Demo)' application window. The 'Customers' tab is active, displaying a table of customer records. The record for 'Chicago Judicial Center' (CustAcct: CHICAG300) is selected. On the right-hand side, the 'Order Entry/Modify' button is highlighted in yellow. Below the table, the status '772 Customers' is visible.

CustAcct	CustomerName	City	State	SmanCode	OfficePhone
BRONS010	Bronson Health Care	Rosemont	IL	GJONAS	708-662-3981
BRUCE100	Bruce Almighty Church	Fish	IN	PLEWIS	317-842-5649
BUBBL100	Bubbles Steakhouse	Stomach	IN	MHUGHES	765-342-4398
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
CALVE100	Calvery Lutheran Church	Fokersbery	KY	WALLY	317-783-2000
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
CHICAG120	Chicago City Memorial Hospital	Tipton	IL	GJONAS	765-655-8700
▶ CHICAG300	Chicago Judicial Center	Chicago	IL	WALLY	312-734-1233
CHICAG100	Chicago Unified School District	Chicago	IL	WALLY	532-345-8100
CHIST100	Chister Supply	Skokie	IL	WALLY	312-944-7205
CHUCK100	Chuckies	Barrington	IN	PLEWIS	317-578-2221
CHUMP100	Chump Advisory Board	Yeahrite	IN	BOB	317-262-3410
CICER100	Cicero Fiddles	Spokane	IN	GJONAS	317-984-4653
CITYF300	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
CITYF500	City of Fergus Falls (sidewalk ro)	Fergus Falls	IN	MHUGHES	317-477-4380
CITYF600	City of Fergus Falls (water)	Fergus Falls	IN	MHUGHES	317-477-8545

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.



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!



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.

Order Desk * STEP1 Supply (Chad Demo)

File Edit Search View Reports Help

Chicago Judicial Center View Current Order Modify Customer Info Customer Status Customer WebSite Exit

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: **WALLY** Ship Address 1: 8048 S. Exchange Ave
 Bill Address 2: **Suite 3349** Price Opt: **d10** Ship Address 2: Suite 3349
 City,State,Zip: **Chicago IL 60617** Route/Day **Chgo/Tue** City,State,Zip: Chicago IL 60617
 Contact: **Bobby Davis** Carrier **Truck 2** Ship Attention:
 Telephone: **312-734-1233** Sales Tax? **Y** Corp Acct: **JUDICAL**
 FAX: **312-734-1234** Tax Freight? **N** Corp Dept: **C-JUD**
 Terms: **Net 45** Charge Freight? **Y** Pmt Group:
 Resale #: **Ill 26-0799-87** AgeStatus: **Hid** CPM Class: **City**
 Comments: **Always call before shipping** Sales Class: **A**
Contact Maxine (ex 201) Calc Class: **B**
with any credit issues Market Group: **GOVT**

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 Reference Items Sale Items

ItemCode	T	C	CPDescription	CurrentPrice	PriceSource	Last Price	LastSaleDate	Last Qty	SubCatCode	Cus
0420-55	I	C	Film Free Glass Cleaner	390.57	B6 CProd	390.57	15-May-2013	0	10-GLASS	
06143	I	C	First Choice Carpet Pre-Spray	14.83	B5 CProd	14.83	15-May-2013	2	10-CARPE	
07531L	I	B	Stratus 3 Dispenser	20.99	S CProd	20.99	1-Sep-2013	38	10-AIRFZ	
101000	I	A	Spartan Shinline Seal 5gal	69.10	d10 Cust	65.00	15-Nov-2014	12	10-LAUND	
140	I	A	Dazzle Floor Finish	100.65	d10 Cust	69.96	5-Dec-2012	1	10-FLOOR	JUD-14
162	I	B	Pristine II Cleaner/Sealer	52.00	B5 CProd	52.00	8-May-2013	4	10-FLOOR	
190108	I	A	26" Front Mount Squeege Kit	0.00	S CProd	0.00	1-Sep-2013	1	30-VACZZ	
20BLK	I	B	20" Black Strip Pad	21.04	B6 CProd	21.04	27-Jan-2013	5	40-PADFL	
20RED	I		20" Red Pad	26.05	B3 CProd				40-PADFL	
20WHI	I	A	20" White Polish Pad	21.04	B6 CProd	21.04	27-Jan-2013	5	40-PADFL	
251	I	C	Enhance Cleaner/Maintainer	51.68	d10 Cust	36.55	21-Jul-2013	3	10-FLOOR	
2818BE	I	D	28 qt Wastebasket	3.33	B6 CProd	3.11	1-Sep-2013	120	50-RECEP	
3302-VAR	I	C	Metered Aerosol Variety Kit	40.00	B6 CProd	40.00	4-Jan-2013	1	10-AIRFR	
351BZ	I	A	35qt Unibody Mopping System	120.58	d10 Cust	89.99	15-Nov-2014	2	40-BUCWR	
353	I	B	Nu-Tra Shine Sealer	32.24	B5 CProd	25.42	6-Sep-2012	2	10-FLOOR	
354	I	C	Sunny Neutral Cleaner Cube	18.97	d10 Cust	15.33	20-Mar-2013	10	10-FLOOR	
49036	I	C	Grip 'n Grab Sponge	28.40	d10 Cust	25.72	1-Nov-2012	0	40-WINDO	

Show Item Type(s)
 Stock Items (I)
 Non-Stock (N)
 Labor Items (L)
 Kits (K)
 Machines (M)
 Service Parts (P)
 Show Discontinued?
 Sort Options:
 CPDescription
 ItemCode
 Type/CPDesc
 Type/ItemCode
 SubCat/CPDesc
 SubCat/ItemCode
 Items Due for ReOrder

56 CProds

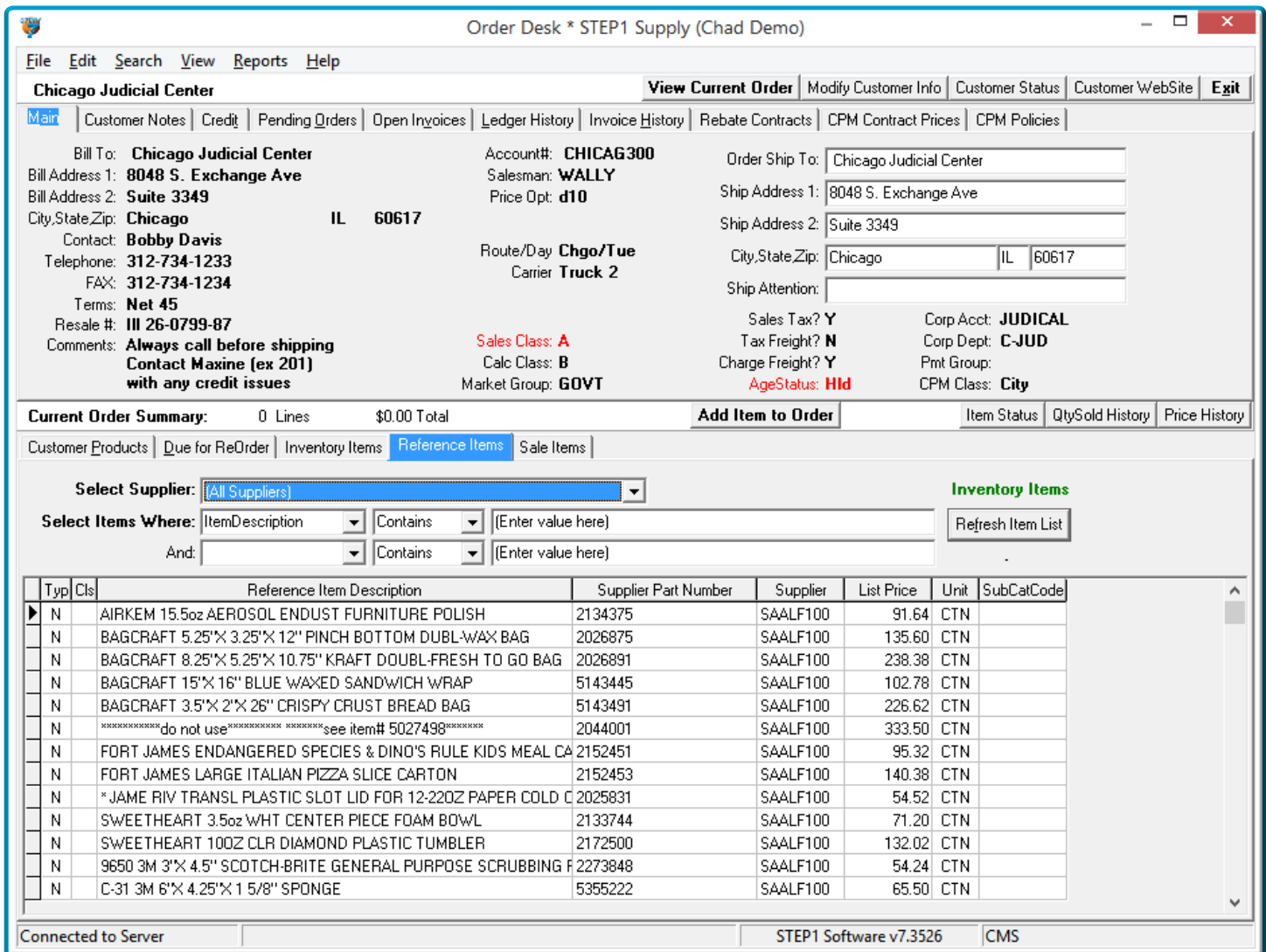
Connected to Server STEP1 Software v7.3526 CMS

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

Chicago Judicial 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.



The screenshot shows the 'Order Desk * STEP1 Supply (Chad Demo)' application window. The 'Reference Items' tab is selected, displaying a list of items with columns for Type, Cls, Reference Item Description, Supplier Part Number, Supplier, List Price, Unit, and SubCatCode.

Current Order Summary: 0 Lines \$0.00 Total

Type	Cls	Reference Item Description	Supplier Part Number	Supplier	List 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-WAX BAG	2026875	SAALF100	135.60	CTN	
N		BAGCRAFT 8.25"X 5.25"X 10.75" KRAFT DOUBL-FRESH 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		*****do not use***** see item# 5027498*****	2044001	SAALF100	333.50	CTN	
N		FORT JAMES ENDANGERED SPECIES & DINO'S RULE KIDS MEAL CA	2152451	SAALF100	95.32	CTN	
N		FORT JAMES LARGE ITALIAN PIZZA SLICE CARTON	2152453	SAALF100	140.38	CTN	
N		* JAME RIV TRANSL PLASTIC SLOT LID FOR 12-22OZ PAPER COLD C	2025831	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 SCRUBBING F	2273848	SAALF100	54.24	CTN	
N		C-31 3M 6"X 4.25"X 1 5/8" SPONGE	5355222	SAALF100	65.50	CTN	

Connected to Server: STEP1 Software 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)

Chicago Judicial Center **View Current Order** Modify Customer Info Customer Status Customer WebSite **Exit**

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: **WALLY** Ship Address 1: 8048 S. Exchange Ave
 Bill Address 2: **Suite 3349** Price Opt: **d10** Ship Address 2: Suite 3349
 City,State,Zip: **Chicago IL 60617** Route/Day **Chgo/Tue** City,State,Zip: Chicago IL 60617
 Contact: **Bobby Davis** Carrier **Truck 2** Ship Attention:
 Telephone: **312-734-1233** Sales Tax? **Y** Corp Acct: **JUDICAL**
 FAX: **312-734-1234** Tax Freight? **N** Corp Dept: **C-JUD**
 Terms: **Net 45** Charge Freight? **Y** Pmt Group:
 Resale #: **Ill 26-0799-87** AgeStatus: **Hid** CPM Class: **City**
 Comments: **Always call before shipping** Sales Class: **A**
 Contact Maxine (ex 201) Calc Class: **B**
 with any credit issues Market Group: **GOVT**

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 **Reference Items** Sale Items

Select Supplier: (All Suppliers) **Inventory Items**

Select Items Where: ItemDescription Contains liner **Refresh Item List**
 And: ItemDescription Contains low **23 Items**

Typ	Cls	Reference Item Description	Supplier Part Number	Supplier	List Price	Unit	SubCatCode
N		HERITAGE 40"X 46" 1.2MIL BLK LOW DENSITY CAN LINER	5509369	SAALF100	34.38	CTN	
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" 1MIL BLK LOW DENSITY CAN LINER	2115485	SAALF100	70.96	CTN	
N		NA PLASTICS 30"X 36" 1.0MIL BLK LOW DENSITY LINER	2115486	SAALF100	44.00	CTN	
N		NA PLASTICS 30"X 36" 1.5MIL BLK LOW DENSITY CAN LINER	2115582	SAALF100	65.98	CTN	
N		NA PLASTICS 33"X 39" 1.5MIL BLK LOW DENSITY CAN LINER					
N		NA PLASTICS 33"X 39" 1MIL BLK LOW DENSITY CAN LINER					
N		NA PLASTICS 33"X 39" 2MIL BLK LOW DENSITY CAN LINER					
N		NA PLASTICS 33"X 39" BLK X-HEAVY LOW DENSITY CAN LINER					
N		NA PLASTICS 38"X 58" .7MIL CLR LOW DENSITY CAN LINER					
N		NA PLASTICS 38"X 58" 1.5MIL BLK LOW DENSITY CAN LINER					

Connected to Server

Modify Special Line

File Help

Description: HERITAGE 43"X 47" 2MIL BLK LOW Order Number:
 Line Number:
 Line Type: S

Number Ordered: 1
 Number Shipped: 1
 Number B/D: 0
 Unit Price (\$): 63.02 System Price (\$): 63.02
 One-Time Price?
 Ship Wgt/unit: 20

Sub-Cat: Special Order Items Item Information
 Supplier: Saalfeld Redistribution Item Code:
 Supplier Part Number: 5185367 Price Unit: CTN
 Price Mult: 1

Cost Information Allow Auto Cost Update?
 Comm Cost: 0.00 Rebate? Rebate?
 G/L Ave Cost: 0.00 Rebate Cost:
 Pub Cost %: 6 Std Cost: 0.00

Hazard Information
 MSDS Required?
 MSDS Code:
 Hazardous?
 HazMat Code:

G/L Interface Dept Major Sub
 Sales 4100
 Cost of Sales 5200
 Inventory 1200

Sales Tax?
 Commission Line?
 Print On Invoice?
 Bid Line?

OK

The item will be added to the order as a special. Check over and fill in anything on the Special Line screen you need and click OK.

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

Last Updated: Last Modified - Oct-2014 · Screens From v73521



PROUD MEMBER OF:

