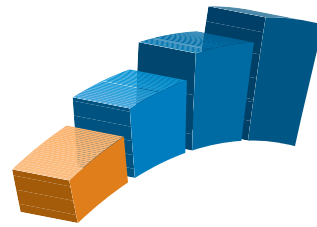# v.7Training

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

WAREHOUSE SHIPPING

IN THIS GUIDE

- SETUP & MANAGE TRUCK RUNS
- WAVE PULLING
- PRINT ALL PICKING TICKETS AS ORDERS COME IN

TO GET STARTED
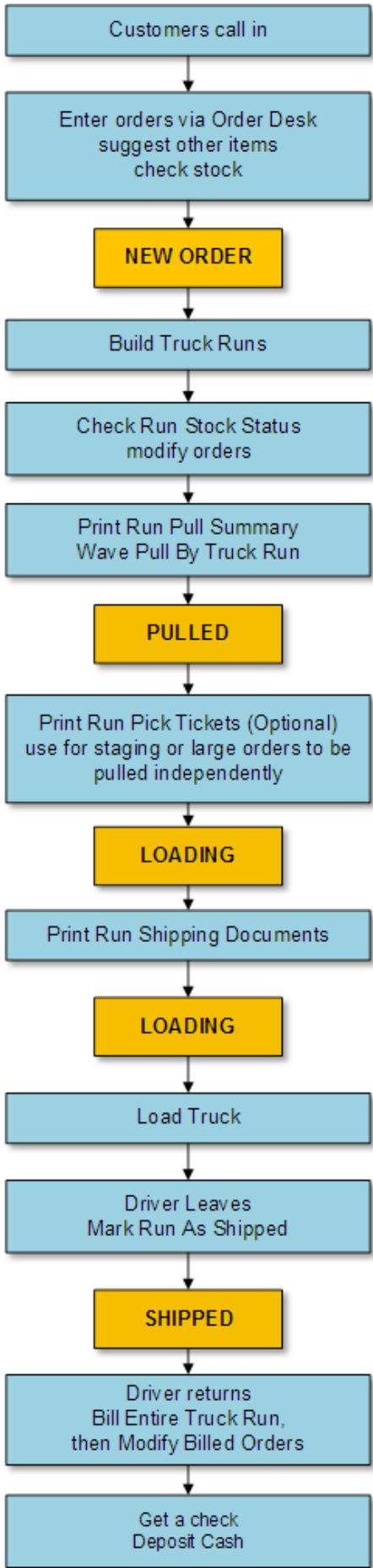
OPEN THE FOLLOWING MODULES:
- WAREHOUSE

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

MOST MODULE TRAINING SESSIONS TAKE ABOUT AN HOUR

Order Flow
Stay in a Straight Line

Activity
Order Status

Customers call in

Enter orders via Order Desk
suggest other items
check stock

NEW ORDER

Build Truck Runs

Check Run Stock Status
modify orders

Print Run Pull Summary
Wave Pull By Truck Run

PULLED

Print Run Pick Tickets (Optional)
use for staging or large orders to be
pulled independently

LOADING

Print Run Shipping Documents

LOADING

Load Truck

Driver Leaves
Mark Run As Shipped

SHIPPED

Driver returns
Bill Entire Truck Run,
then Modify Billed Orders

Get a check
Deposit Cash

STEP1 SOFTWARE SOLUTIONS
ONE STEP AHEAD
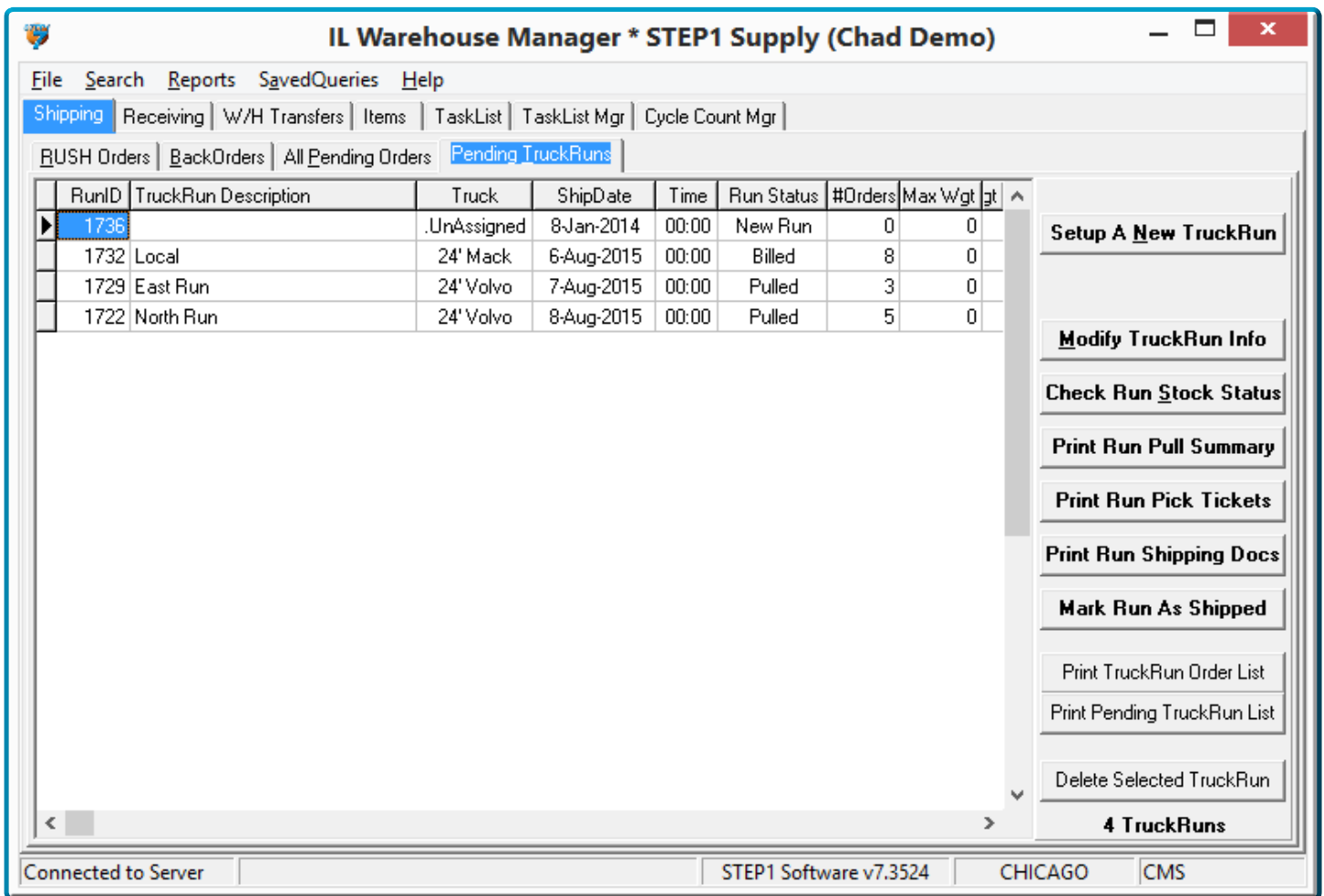
In this section of the guide you will learn how to Setup and Manage Your Truck Runs.

Once you've opened the Warehouse Module, Make sure that the shipping tab is open then click on the Pending TruckRuns tab to open the window below.

IL Warehouse Manager * STEP1 Supply (Chad Demo)

File   Search   Reports   SavedQueries   Help

Shipping | Receiving | W/H Transfers | Items | TaskList | TaskList Mgr | Cycle Count Mgr

RUSH Orders | BackOrders | All Pending Orders | Pending TruckRuns

RunID	TruckRun Description	Truck	ShipDate	Time	Run Status	#Orders	Max Wgt	gt
1736		.UnAssigned	8-Jan-2014	00:00	New Run	0	0	
1732	Local	24' Mack	6-Aug-2015	00:00	Billed	8	0	
1729	East Run	24' Volvo	7-Aug-2015	00:00	Pulled	3	0	
1722	North Run	24' Volvo	8-Aug-2015	00:00	Pulled	5	0	

Setup A New TruckRun

Modify TruckRun Info

Check Run Stock Status

Print Run Pull Summary

Print Run Pick Tickets

Print Run Shipping Docs

Mark Run As Shipped

Print TruckRun Order List

Print Pending TruckRun List

Delete Selected TruckRun

4 TruckRuns

Connected to Server   STEP1 Software v7.3524   CHICAGO   CMS

Click the Setup New Truck Run button to do exactly that, setup a new truck run. The screen pictured to the right will open.

Setup A New TruckRun

File   Search   Help

Rush Orders | Pending Orders | BackOrders | Future/Hold/WHTransfer | Orders Assigned to this TruckRun | Sequence

TruckRun ID: 1737
TruckRun Description:

Customer Name	Order Date	Target Ship	Ready	Status	Type	Route	RunID	TotWgt
DJ's Pool	27-Jul-2013		Y	Will Call	CS	.CPU	0	2
D J's Pool	27-Jul-2013		Y	Will Call	IN	.CPU	0	0
Bradner Village HCC	9-Aug-2013		Y	BackOrder	IN	AUROR	0	36
Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	IN	W SETE	0	0
Linder Technical Services	10-Aug-2013		Y	New Order	IN	UPS	0	0
Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	IN	SBEND	0	8
Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
A & J Carpet & Janitorial	23-Aug-2013		Y	New Order	IN	SERVIC	0	1829
Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	CS	UPS	0	116
Bynum's Steakhouse	25-Aug-2013		Y	PT Printed	IN	SERVIC	0	105
Grant Blackford Mental Health	25-Aug-2013		Y	BackOrder	IN	AUROR	0	46
Knights of Columbus	28-Aug-2013		Y	BackOrder	IN	UPS	0	6
Lighthouse Assembly of God	28-Aug-2013		Y	BackOrder	IN	AUROR	0	37
Hamilton Co.Bldgs & Grnds.-Jail	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	120
Stoney Creek Play School	29-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
Bayer Healthcare-Diagnostics	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	33
Hamilton County Comm Correctic	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	2
ISU / Hullman Student Union	30-Aug-2013		Y	BackOrder	IN	UPS	0	72
Conner Prairie	30-Aug-2013		Y	BackOrder	IN	SERVIC	0	10
Indiana Wesleyan Univ	1-Sep-2013		Y	BackOrder	IN	UPS	0	27

Truck: .UnAssigned
Ship Date: 4-May-2014
Ship Time: 00:00   HH:MM 24hr

TruckRun Summary
Assigned Orders: 0
Total ShipWgt: 0
Max Truck ShipWgt: 0
Total ShipCubes: 0
Max Truck Cubes: 0

Assign Orders to TruckRun
All Orders for Selected Route
Assign Selected Order To Run
Assign All Orders on this List

Remove Orders from Run
All Orders for Selected Route
Remove Selected Order from Run
Remove All Orders on this List

Assign Order to Another TruckRun
Change Order Delivery Route
Toggle Order ReadyToShip Flag
View Order

Order List Options
○ List All Pending Orders (No DropShips/Quotes)
● Only List Orders Not Assigned to a TruckRun

Refresh List

Select List Options, then Click the 'Refresh List' Button.
To Sort or Search on a Column, RightClick on that column.

Order Status Options
☑ Show 'ReadyToShip' Orders Only
☑ Show BackOrders
☐ Show CreditHold Orders
☐ Show Future/Hold/WHTransfer
☑ Show Service Orders

Save TruckRun Info
30 Orders

Connected to Server   STEP1 Extranet Software

This is a list of all the pending orders available to add to a truck run. We will go over the different ways you can add them.

The first thing you need to do when setting up a new truck run is give it a name. Type in a description in the text line. Then select a truck from the drop box. (Details on setting up a new delivery truck in the Table Setup Guide.) Now select a ship date and ship time if necessary.

Setup A New TruckRun

File   Search   Help

Rush Orders | Pending Orders | BackOrders | Future/Hold/WHTransfer | Orders Assigned to this TruckRun | Sequence

Customer Name	Order Date	Target Ship	Ready	Status	Type	Route	RunID	TotWgt
DJ's Pool	27-Jul-2013		Y	Will Call	CS	.CPU	0	2
D J's Pool	27-Jul-2013		Y	Will Call	IN	.CPU	0	0
Bradner Village HCC	9-Aug-2013		Y	BackOrder	IN	AUROR	0	36
Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	IN	W SETE	0	0
Linder Technical Services	10-Aug-2013		Y	New Order	IN	UPS	0	0
Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	IN	SBEND	0	8
Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
A & J Carpet & Janitorial	23-Aug-2013		Y	New Order	IN	SERVIC	0	1829
Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	CS	UPS	0	116
Bynum's Steakhouse	25-Aug-2013		Y	PT Printed	IN	SERVIC	0	105
Grant Blackford Mental Health	25-Aug-2013		Y	BackOrder	IN	AUROR	0	46
Knights of Columbus	28-Aug-2013		Y	BackOrder	IN	UPS	0	6
Lighthouse Assembly of God	28-Aug-2013		Y	BackOrder	IN	AUROR	0	37
Hamilton Co.Bldgs & Grnds.-Jail	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	120
Stoney Creek Play School	29-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
Bayer Healthcare-Diagnostics	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	33
Hamilton County Comm Correctic	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	2
ISU / Hullman Student Union	30-Aug-2013		Y	BackOrder	IN	UPS	0	72
Conner Prairie	30-Aug-2013		Y	BackOrder	IN	SERVIC	0	10
Indiana Wesleyan Univ	1-Sep-2013		Y	BackOrder	IN	UPS	0	27

Refresh List

Order List Options
- ○ List All Pending Orders (No DropShips/Quotes)
- ● Only List Orders Not Assigned to a TruckRun

Select List Options, then Click the 'Refresh List' Button.
To Sort or Search on a Column, RightClick on that column.

Order Status Options
- ☑ Show 'ReadyToShip' Orders Only
- ☑ Show BackOrders
- ☐ Show CreditHold Orders
- ☐ Show Future/Hold/WHTransfer
- ☑ Show Service Orders

Connected to Server | STEP1 Extranet Software

TruckRun ID: 1737
TruckRun Description:

Truck: .UnAssigned ▼
Ship Date: 4-May-2014 ▼
Ship Time: 00:00   HH:MM 24hr

TruckRun Summary
# Assigned Orders:	0
Total ShipWgt:	0
Max Truck ShipWgt:	0
Total ShipCubes:	0
Max Truck Cubes:	0

Assign Orders to TruckRun
- All Orders for Selected Route
- Assign Selected Order To Run
- Assign All Orders on this List

Remove Orders from Run
- All Orders for Selected Route
- Remove Selected Order from Run
- Remove All Orders on this List

- Assign Order to Another TruckRun
- Change Order Delivery Route
- Toggle Order ReadyToShip Flag
- View Order

Save TruckRun Info

30 Orders

Use this section of options to customize the way these orders get listed above. You can change these to show only the orders that are not already on a truck run by selecting the option. Any of the check boxes in this section could change the list you see on screen. Once you've made your choices click the Refresh List button on the left to apply your new options to the list.

For this Truck Run that we are setting up we now need to start adding orders. To add all the orders from a specific route you must highlight an order that is assigned to the route, then click on the All Orders for Selected Route button.

Setup A New TruckRun

File   Search   Help

| | Rush Orders | Pending Orders | BackOrders | Future/Hold/WHTransfer | Orders Assigned to this TruckRun | Sequence |

Customer Name	Order Date	Target Ship	Ready	Status	Type	Route	RunID	TotWgt
DJ's Pool	27-Jul-2013		Y	Will Call	CS	.CPU	0	2
D J's Pool	27-Jul-2013		Y	Will Call	IN	.CPU	0	0
Bradner Village HCC	9-Aug-2013		Y	BackOrder	IN	AUROR	0	36
Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	IN	W SETE	0	0
Linder Technical Services	10-Aug-2013		Y	New Order	IN	UPS	0	0
Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	IN	SBEND	0	8
Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
A & J Carpet & Janitorial	23-Aug-2013		Y	New Order	IN	SERVIC	0	1829
Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	CS	UPS	0	116
Bynum's Steakhouse	25-Aug-2013		Y	PT Printed	IN	SERVIC	0	105
Grant Blackford Mental Health	25-Aug-2013		Y	BackOrder	IN	AUROR	0	46
Knights of Columbus	28-Aug-2013		Y	BackOrder	IN	UPS	0	6
Lighthouse Assembly of God	28-Aug-2013		Y	BackOrder	IN	AUROR	0	37
Hamilton Co.Bldgs & Grnds.-Jail	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	120
Stoney Creek Play School	29-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
Bayer Healthcare-Diagnostics	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	33
Hamilton County Comm Correctic	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	2
ISU / Hullman Student Union	30-Aug-2013		Y	BackOrder	IN	UPS	0	72
Conner Prairie	30-Aug-2013		Y	BackOrder	IN	SERVIC	0	10
Indiana Wesleyan Univ	1-Sep-2013		Y	BackOrder	IN	UPS	0	27

Refresh List

Order List Options
- ○ List All Pending Orders (No DropShips/Quotes)
- ● Only List Orders Not Assigned to a TruckRun

Select List Options, then Click the 'Refresh List' Button.
To Sort or Search on a Column, RightClick on that column.

Order Status Options
- ☑ Show 'ReadyToShip' Orders Only
- ☑ Show BackOrders
- ☐ Show CreditHold Orders
- ☐ Show Future/Hold/WHTransfer
- ☑ Show Service Orders

Connected to Server   STEP1 Extranet Software

TruckRun ID: **1737**
TruckRun Description:

Truck: .UnAssigned ▼
Ship Date: 4-May-2014 ▼
Ship Time: 00:00   HH:MM 24hr

TruckRun Summary
# Assigned Orders:	**0**
Total ShipWgt:	**0**
Max Truck ShipWgt:	**0**
Total ShipCubes:	**0**
Max Truck Cubes:	**0**

Assign Orders to TruckRun
- All Orders for Selected Route
- Assign Selected Order To Run
- Assign All Orders on this List

Remove Orders from Run
- All Orders for Selected Route
- Remove Selected Order from Run
- Remove All Orders on this List

- Assign Order to Another TruckRun
- Change Order Delivery Route
- Toggle Order ReadyToShip Flag
- View Order

Save TruckRun Info
30 Orders

Keep an eye on this section as we build our truck run. Here is where you can see how many orders you have added to this truck run so far. It also shows the total ship wight and cubes so far along with the maximum capacities of the truck you selected for this run.

You can also select just one order to be added to this truck run. Click the Assign Selected Order To Run button and which ever order you have highlighted will be added to this truck run. Once you've done that, notice your totals in the truck run summary have been changed to reflect the shipping information from the new order you just added.

Setup A New TruckRun

File   Search   Help

Rush Orders | Pending Orders | BackOrders | Future/Hold/WHTransfer | Orders Assigned to this TruckRun | Sequence

TruckRun ID: 1737
TruckRun Description:

Customer Name	Order Date	Target Ship	Ready	Status	Type	Route	RunID	TotWgt
DJ's Pool	27-Jul-2013		Y	Will Call	CS	.CPU	0	2
D J's Pool	27-Jul-2013		Y	Will Call	IN	.CPU	0	0
Bradner Village HCC	9-Aug-2013		Y	BackOrder	IN	AUROR	0	36
Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	IN	W SETE	0	0
Linder Technical Services	10-Aug-2013		Y	New Order	IN	UPS	0	0
Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	IN	SBEND	0	8
Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
A & J Carpet & Janitorial	23-Aug-2013		Y	New Order	IN	SERVIC	0	1829
Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	CS	UPS	0	116
Bynum's Steakhouse	25-Aug-2013		Y	PT Printed	IN	SERVIC	0	105
Grant Blackford Mental Health	25-Aug-2013		Y	BackOrder	IN	AUROR	0	46
Knights of Columbus	28-Aug-2013		Y	BackOrder	IN	UPS	0	6
Lighthouse Assembly of God	28-Aug-2013		Y	BackOrder	IN	AUROR	0	37
Hamilton Co.Bldgs & Grnds.-Jail	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	120
Stoney Creek Play School	29-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
Bayer Healthcare-Diagnostics	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	33
Hamilton County Comm Correctic	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	2
ISU / Hullman Student Union	30-Aug-2013		Y	BackOrder	IN	UPS	0	72
Conner Prairie	30-Aug-2013		Y	BackOrder	IN	SERVIC	0	10
Indiana Wesleyan Univ	1-Sep-2013		Y	BackOrder	IN	UPS	0	27

Truck: .UnAssigned
Ship Date: 4-May-2014
Ship Time: 00:00   HH:MM 24hr

TruckRun Summary
Assigned Orders: 0
Total ShipWgt: 0
Max Truck ShipWgt: 0
Total ShipCubes: 0
Max Truck Cubes: 0

Assign Orders to TruckRun
All Orders for Selected Route
Assign Selected Order To Run
Assign All Orders on this List

Remove Orders from Run
All Orders for Selected Route
Remove Selected Order from Run
Remove All Orders on this List

Assign Order to Another TruckRun
Change Order Delivery Route
Toggle Order ReadyToShip Flag
View Order

Save TruckRun Info
30 Orders

Order List Options
○ List All Pending Orders (No DropShips/Quotes)
● Only List Orders Not Assigned to a TruckRun

Refresh List

Select List Options, then Click the 'Refresh List' Button.
To Sort or Search on a Column, RightClick on that column.

Order Status Options
☑ Show 'ReadyToShip' Orders Only
☑ Show BackOrders
☐ Show CreditHold Orders
☐ Show Future/Hold/WHTransfer
☑ Show Service Orders

Connected to Server   STEP1 Extranet Software

We are not going to press this button in this example but just be aware that you can also add all the pending orders in the list to your truck run if necessary.

If you add an order to this truck run that was previously assigned to another run, it will be removed from the other run.

If you need to remove any of the orders you have added to the truck run these 3 buttons will do it for you. If you want to remove all the orders for a certain route make sure you have an order from that route highlighted on the list then click the first of the 3 buttons to remove all of them. You can also remove a single order simply by highlighting that order and clicking the second button. Clicking the third button removes all of the orders that have been added to this run.

Setup A New TruckRun

File   Search   Help

Rush Orders | Pending Orders | BackOrders | Future/Hold/WHTransfer | Orders Assigned to this TruckRun | Sequence

Customer Name	Order Date	Target Ship	Ready	Status	Type	Route	RunID	TotWgt
DJ's Pool	27-Jul-2013		Y	Will Call	CS	.CPU	0	2
D J's Pool	27-Jul-2013		Y	Will Call	IN	.CPU	0	0
Bradner Village HCC	9-Aug-2013		Y	BackOrder	IN	AUROR	0	36
Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	IN	W SETE	0	0
Linder Technical Services	10-Aug-2013		Y	New Order	IN	UPS	0	0
Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	IN	SBEND	0	8
Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
A & J Carpet & Janitorial	23-Aug-2013		Y	New Order	IN	SERVIC	0	1829
Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	CS	UPS	0	116
Bynum's Steakhouse	25-Aug-2013		Y	PT Printed	IN	SERVIC	0	105
Grant Blackford Mental Health	25-Aug-2013		Y	BackOrder	IN	AUROR	0	46
Knights of Columbus	28-Aug-2013		Y	BackOrder	IN	UPS	0	6
Lighthouse Assembly of God	28-Aug-2013		Y	BackOrder	IN	AUROR	0	37
Hamilton Co.Bldgs & Grnds..Jail	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	120
Stoney Creek Play School	29-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
Bayer Healthcare-Diagnostics	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	33
Hamilton County Comm Correctic	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	2
ISU / Hullman Student Union	30-Aug-2013		Y	BackOrder	IN	UPS	0	72
Conner Prairie	30-Aug-2013		Y	BackOrder	IN	SERVIC	0	10
Indiana Wesleyan Univ	1-Sep-2013		Y	BackOrder	IN	UPS	0	27

TruckRun ID: 1737

TruckRun Description:

Truck: .UnAssigned

Ship Date: 4-May-2014

Ship Time: 00:00   HH:MM 24hr

TruckRun Summary
Assigned Orders: 0
Total ShipWgt: 0
Max Truck ShipWgt: 0
Total ShipCubes: 0
Max Truck Cubes: 0

Assign Orders to TruckRun
All Orders for Selected Route
Assign Selected Order To Run
Assign All Orders on this List

Remove Orders from Run
All Orders for Selected Route
Remove Selected Order from Run
Remove All Orders on this List

Assign Order to Another TruckRun
Change Order Delivery Route
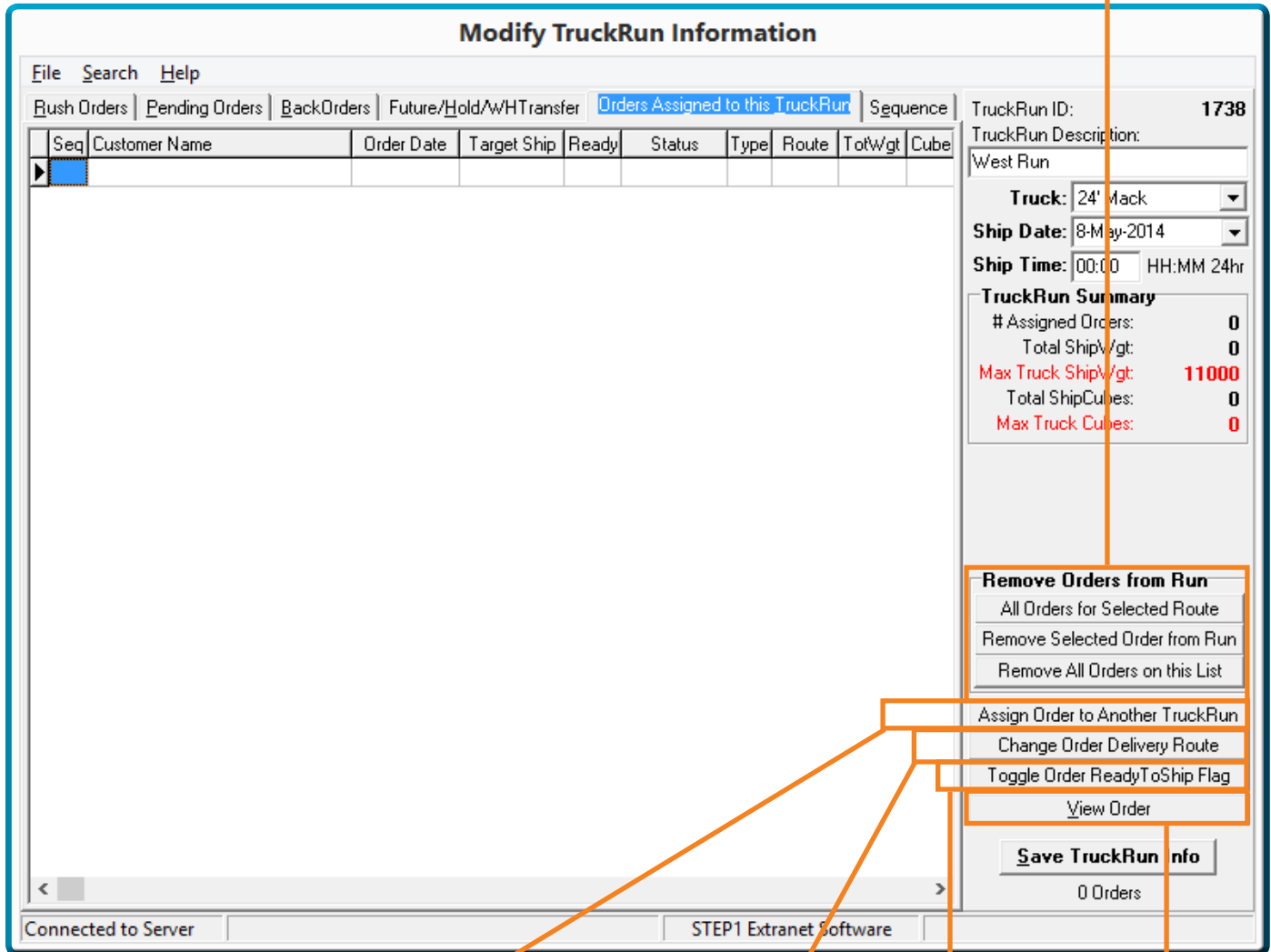Toggle Order ReadyToShip Flag
View Order

Save TruckRun Info
30 Orders

Select TruckRun

Options

	RunID	TruckRunDesc	Truck	ShipDate	Time	Status
▶	1736		.UnAssigned	8-Jan-2014	00:00	New Run
	1729	East Run	24' Volvo	7-Aug-2015	00:00	Pulled
	1722	North Run	24' Volvo	8-Aug-2015	00:00	Pulled

Within this truck run you can also select orders to be assigned to another truck run that has already been setup in your system. Click the button above to open the screen on the left. Just select the truck run that you want the order you selected to be assigned to.

Select Delivery Route

Options

Delivery Route Description	RouteCode
Customer Pick-up	.CPU
Salesman	Z BOBS
Salesman	Z GEOFF
Salesman	Z MIKE
Salesman	Z PAUL
Salesman	Z ROB
Salesman	Z BOB
Salesman	Z JERRY
Inside sales	Z ANN
Inside Sales Staff	Z CHRIS
bottomline fast react	COURIER
Freight carrier	R&L
Freight carrier	OVERNITE
Freight carrier	CON WAY

Click this button to change to order delivery route. This screen to the left will open and you can just choose one from the list and double-click to make the change.

TruckRun

			Type	Route	RunID	TotWgt
			CS	.CPU	0	2
D J's Pool	27-Jul-2013	Y	Will Call	IN	.CPU	0	0
Bradner Village HCC	9-Aug-2013	Y	BackOrder	IN	AUROR	0	36
Tipton Cty Memorial Hospital	10-Aug-2013	Y	BackOrder	IN	W SETE	0	0
Linder Technical Services	10-Aug-2013	Y	New Order	IN	UPS	0	0
Community Hospital/Ritter	14-Aug-2013	Y	BackOrder	IN	SBEND	0	8
Advantage Floor Care Serv. Inc	21-Aug-2013	Y	PT Printed	IN	SERVIC	0	0
A & J Carpet & Janitorial	23-Aug-2013	Y	New Order	IN	SERVIC	0	1829
Squeaky Clean Professionals	24-Aug-2013		PT Printed	CS	UPS	0	116
Bynum's Steakhouse	25-Aug-2013		PT Printed	IN	SERVIC	0	105
Grant Blackford Mental Health	25-Aug-2013		BackOrder	IN	AUROR	0	46
Knights of Columbus	28-Aug-2013		BackOrder	IN	UPS	0	6
Lighthouse Assembly of God	28-Aug-2013		BackOrder	IN	AUROR	0	37
Hamilton Co.Bldgs & Grnds.-Jail	29-Aug-2013		BackOrder	IN	SERVIC	0	120
Stoney Creek Play School	29-Aug-2013		PT Printed	IN	SERVIC	0	0
Bayer Healthcare-Diagnostics	29-Aug-2013		BackOrder	IN	SERVIC	0	33
Hamilton County Comm Correctic	29-Aug-2013		BackOrder	IN	SERVIC	0	2
ISU / Hullman Student Union	30-Aug-2013		BackOrder	IN	UPS	0	72
Conner Prairie	30-Aug-2013		BackOrder	IN	SERVIC	0	10
Indiana Wesleyan Univ	1-Sep-2013		BackOrder	IN	UPS	0	27

Assigned to this TruckRun | Sequence

TruckRun ID: **1737**

TruckRun Description:

Truck: .UnAssigned
Ship Date: 4-May-2014
Ship Time: 00:00   HH:MM 24hr

TruckRun Summary
Assigned Orders: **0**
Total ShipWgt: **0**
Max Truck ShipWgt: **0**
Total ShipCubes: **0**
Max Truck Cubes: **0**

Assign Orders to TruckRun
All Orders for Selected Route
Assign Selected Order To Run
Assign All Orders on this List

Remove Orders from Run
All Orders for Selected Route
Remove Selected Order from Run
Remove All Orders on this List

Assign Order to Another TruckRun
Change Order Delivery Route
Toggle Order ReadyToShip Flag
View Order

Save TruckRun Info
30 Orders

Refresh List

Order List Options
○ List All Pending Orders (No DropShips/Quotes)
◉ Only List Orders Not Assigned to a TruckRun

Order Status Options
☑ Show 'ReadyToShip' Orders Only
☑ Show BackOrders
☐ Show CreditHold Orders
☐ Show Future/Hold/WHTransfer
☑ Show Service Orders

Select List Options, then Click the 'Refresh List' Button.
To Sort or Search on a Column, RightClick on that column.

Connected to Server | STEP1 Extranet Software

Click the Toggle Order Ready To Ship Flag button to change the ready to ship flag for the selected order to "No" if it is already "Yes" and "Yes if it is already "No".

Click this button to have a look at the order you have highlighted. You are not allowed to make changes to the order from here.

Setup A New TruckRun

File   Search   Help

Rush Orders | **Pending Orders** | BackOrders | Future/Hold/WHTransfer | Orders Assigned to this TruckRun | Sequence

TruckRun ID: 1737

TruckRun Description:

Customer Name	Order Date	Target Ship	Ready	Status	Type	Route	RunID	TotWgt
DJ's Pool	27-Jul-2013		Y	Will Call	CS	.CPU	0	2
D J's Pool	27-Jul-2013		Y	Will Call	IN	.CPU	0	0
Bradner Village HCC	9-Aug-2013		Y	BackOrder	IN	AUROR	0	36
Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	IN	W SETE	0	0
Linder Technical Services	10-Aug-2013		Y	New Order	IN	UPS	0	0
Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	IN	SBEND	0	8
Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
A & J Carpet & Janitorial	23-Aug-2013		Y	New Order	IN	SERVIC	0	1829
Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	CS	UPS	0	116
Bynum's Steakhouse	25-Aug-2013		Y	PT Printed	IN	SERVIC	0	105
Grant Blackford Mental Health	25-Aug-2013		Y	BackOrder	IN	AUROR	0	46
Knights of Columbus	28-Aug-2013		Y	BackOrder	IN	UPS	0	6
Lighthouse Assembly of God	28-Aug-2013		Y	BackOrder	IN	AUROR	0	37
Hamilton Co.Bldgs & Grnds.Jail	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	120
Stoney Creek Play School	29-Aug-2013		Y	PT Printed	IN	SERVIC	0	0
Bayer Healthcare-Diagnostics	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	33
Hamilton County Comm Correctic	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	2
ISU / Hullman Student Union	30-Aug-2013		Y	BackOrder	IN	UPS	0	72
Conner Prairie	30-Aug-2013		Y	BackOrder	IN	SERVIC	0	10
Indiana Wesleyan Univ	1-Sep-2013		Y	BackOrder	IN	UPS	0	27

Truck: .UnAssigned

Ship Date: 4-May-2014

Ship Time: 00:00   HH:MM 24hr

TruckRun Summary
Assigned Orders: 0
Total ShipWgt: 0
Max Truck ShipWgt: **0**
Total ShipCubes: 0
Max Truck Cubes: **0**

Assign Orders to TruckRun
All Orders for Selected Route
Assign Selected Order To Run
Assign All Orders on this List

Remove Orders from Run
All Orders for Selected Route
Remove Selected Order from Run
Remove All Orders on this List

Assign Order to Another TruckRun
Change Order Delivery Route
Toggle Order ReadyToShip Flag
View Order
Save TruckRun Info
30 Orders

Order List Options
○ List All Pending Orders (No DropShips/Quotes)
● Only List Orders Not Assigned to a TruckRun

Refresh List

Select List Options, then Click the 'Refresh List' Button.
To Sort or Search on a Column, RightClick on that column.

Order Status Options
☑ Show 'ReadyToShip' Orders Only
☑ Show BackOrders
☐ Show CreditHold Orders
☐ Show Future/Hold/WHTransfer
☑ Show Service Orders

Connected to Server   STEP1 Extranet Software

Click the Save Truck Run Info button to finish up this run and go back to pending truck runs

Now that you have your new truck run entered into the system you can see it here under the Pending TruckRuns tab. If you should decide that you need modify this run in any way click the Modify TruckRun Info button to open a window that is, as you can see here is, very similar to the setup window.

The tab that opens first is the Orders Assigned to this TruckRun tab. If you need to modify this truck run by removing orders from it, these 3 buttons are where you do it. The first button removes all the orders that have the same delivery route as the order you have highlighted. The second button only removes the order you have highlighted. And the third button removes all the orders that are assigned to this truck run.

Modify TruckRun Information

File   Search   Help

Rush Orders | Pending Orders | BackOrders | Future/Hold/WHTransfer | Orders Assigned to this TruckRun | Sequence

	Seq	Customer Name	Order Date	Target Ship	Ready	Status	Type	Route	TotWgt	Cube
►										

TruckRun ID: 1738

TruckRun Description:
West Run

Truck: 24' Mack

Ship Date: 8-May-2014

Ship Time: 00:00   HH:MM 24hr

TruckRun Summary
Assigned Orders: 0
Total ShipWgt: 0
Max Truck ShipWgt: **11000**
Total ShipCubes: 0
Max Truck Cubes: **0**

Remove Orders from Run
All Orders for Selected Route
Remove Selected Order from Run
Remove All Orders on this List

Assign Order to Another TruckRun
Change Order Delivery Route
Toggle Order ReadyToShip Flag
View Order

Save TruckRun Info
0 Orders

Connected to Server   STEP1 Extranet Software

Click this button if you want to move this order from this truck run to a different run. A window containing a list of the available runs will open up for you to select from.

Click this button if you want to change the highlighted order's delivery route. A window containing a list of the available routes will open up for you to select from.

Click this button if you want to change the highlighted order's shipping status to Ready "Y" or Ready "N". Changing this flag lets the system know whther or not this order should be shipping yet or not.

Click this button if you want to View the highlighted order. (Opens a new window)

If the modification you need to make requires adding orders to this truck run then you need to be in the pending orders tab. Once you click the pending orders tab you'll notice that the Assign Orders to Truck Run section appears on the right, along with the complete list of pending orders to the right. To add all of the orders with the same delivery route as the order you have highlighted click the first button. Click the second button to add only the highlighted order. And click the third to add all of the pending orders to this truck run.

Once you have all of your modifications finished click the Save TruckRun Info button on the bottom right, and your done.
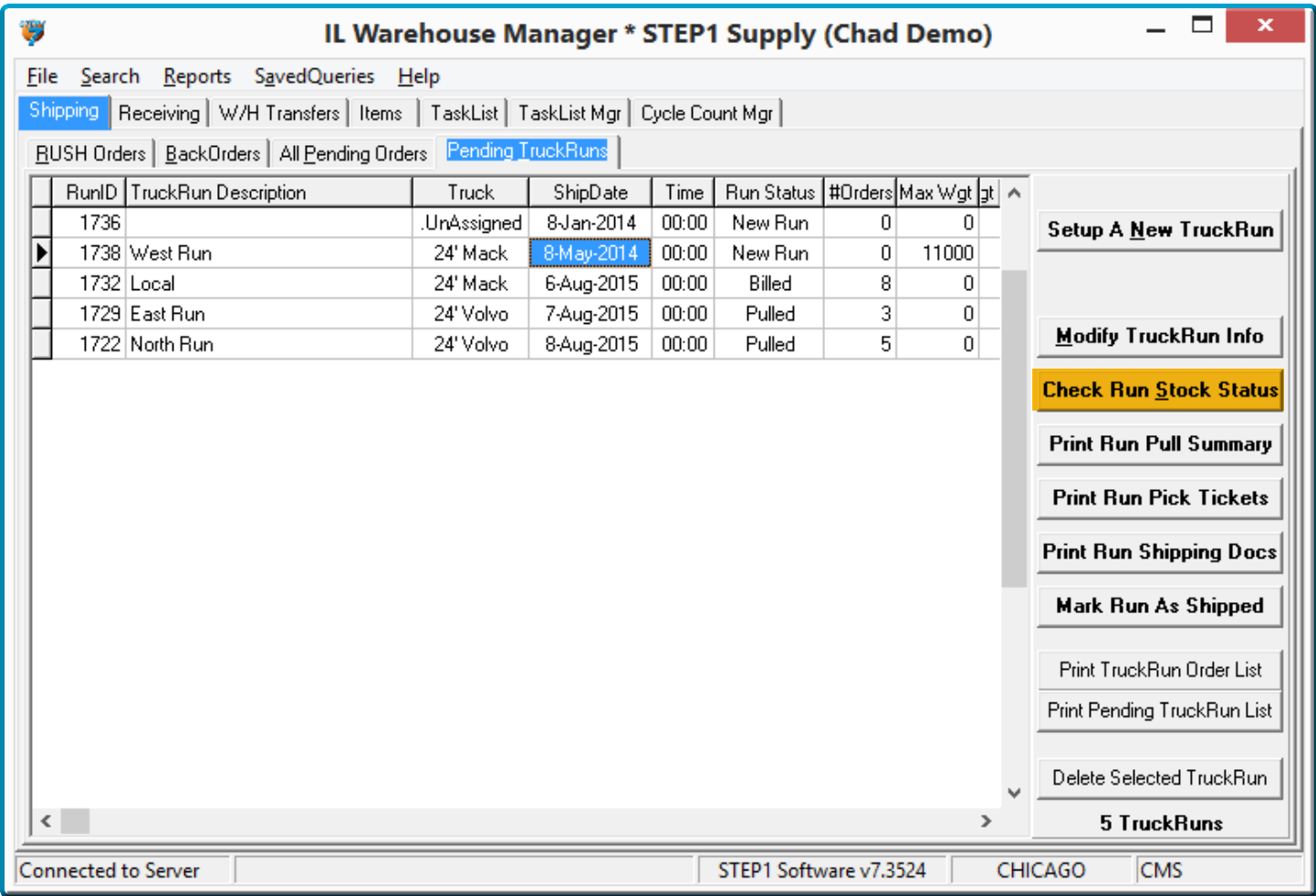
Clicking on the Check Item Stock Status button opens up this window to the right. The Tab that will be open is the Item Stock Summary tab. This shows the different stock levels for all the items on all the orders assigned to this truck run. You can edit the options on the bottom of the screen to change what is shown in this list. There is also a Item Status Check button towards the bottom left corner in which you can see costing and pricing info as well as any other info that pertains to the highlighted item.
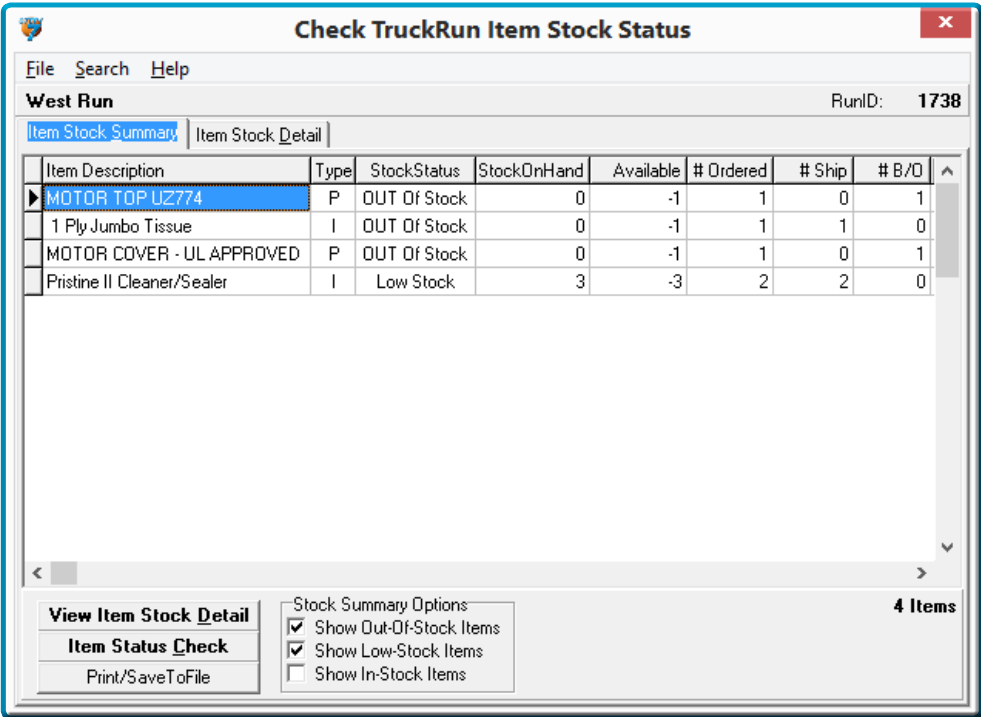
The next tab on your screen is the Item Stock Detail. Clicking on this tab shows you the info for just the highlighted item. Under this tab you'll see the list of orders that contain this specific item. From here you can view an item status check which includes price and cost info. You can view the order itself (won't be able to make changes from the view order screen).

Check TruckRun Item Stock Status

File   Search   Help

West Run   RunID: 1738

| Item Stock Summary | Item Stock Detail |

MOTOR TOP UZ774   AD1406622010   OnHand: **0**   Available: **-1**

CustomerName	C	OrderDate	TargetShip	# Ordered	# Ship	# B/O	
Dingmans Sporting Goods	A	19-Mar-2015	24-Mar-2015	1	0	1	

Item Status Check

View Order

Modify Order Qtys

Remove Order from Run
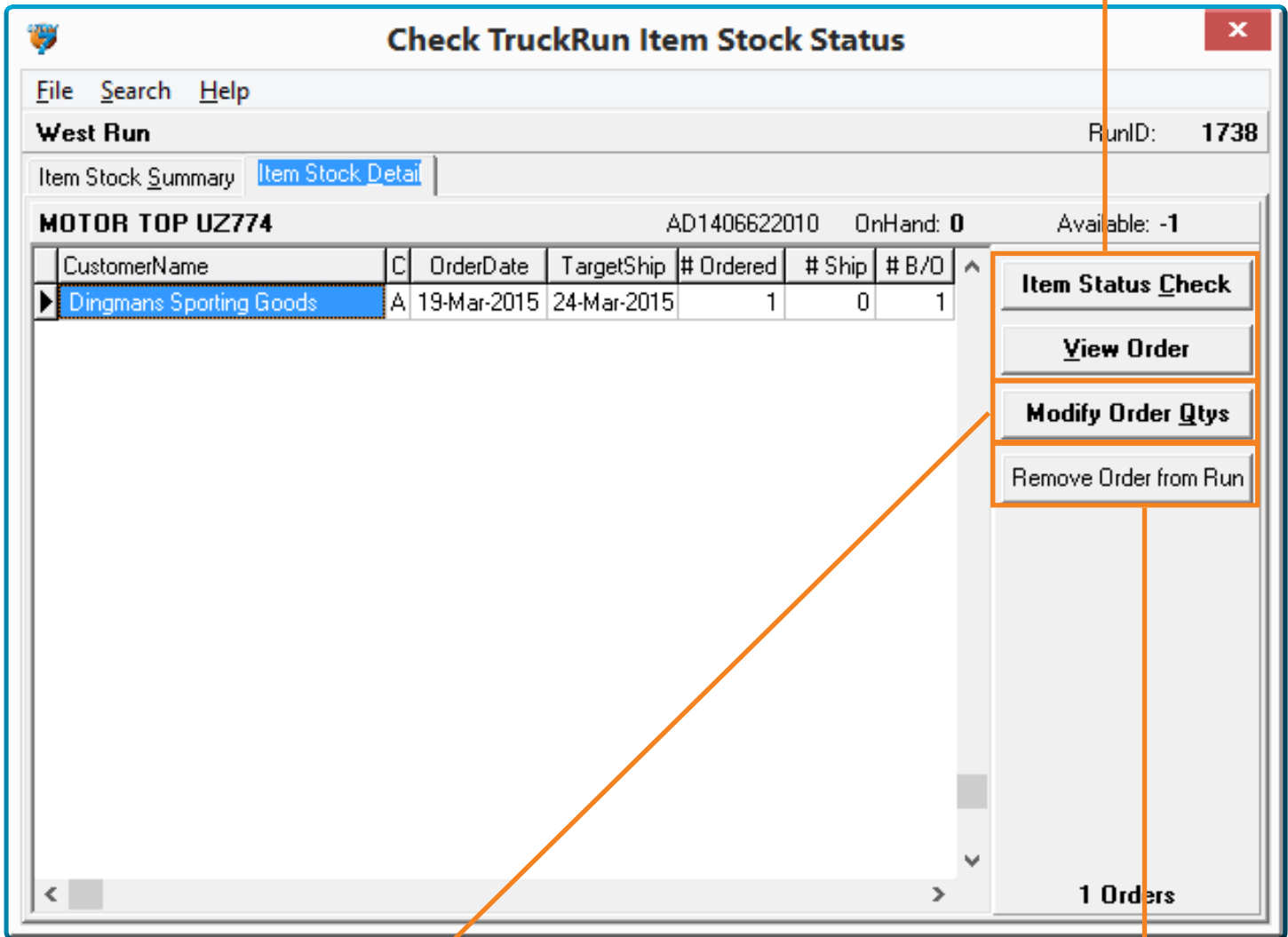
1 Orders

Clicking the Modify Order Qtys button opens a new window that looks similar to the the view order screen. (exact same window with the same capabilities as the one seen earlier in this guide) It allows you to change Quantity Shipped and Quantity Back Ordered for this item on the highlighted order.

Clicking this last button will remove the highlighted order from the truck run you have been working on.

Click the Print Run Pick Tickets button to print all of the picking tickets for the highlighted truck run. STEP1 will then change the Run Status to PT Printed (will still be the same as new order, just changes it so you know which of them you have printed).
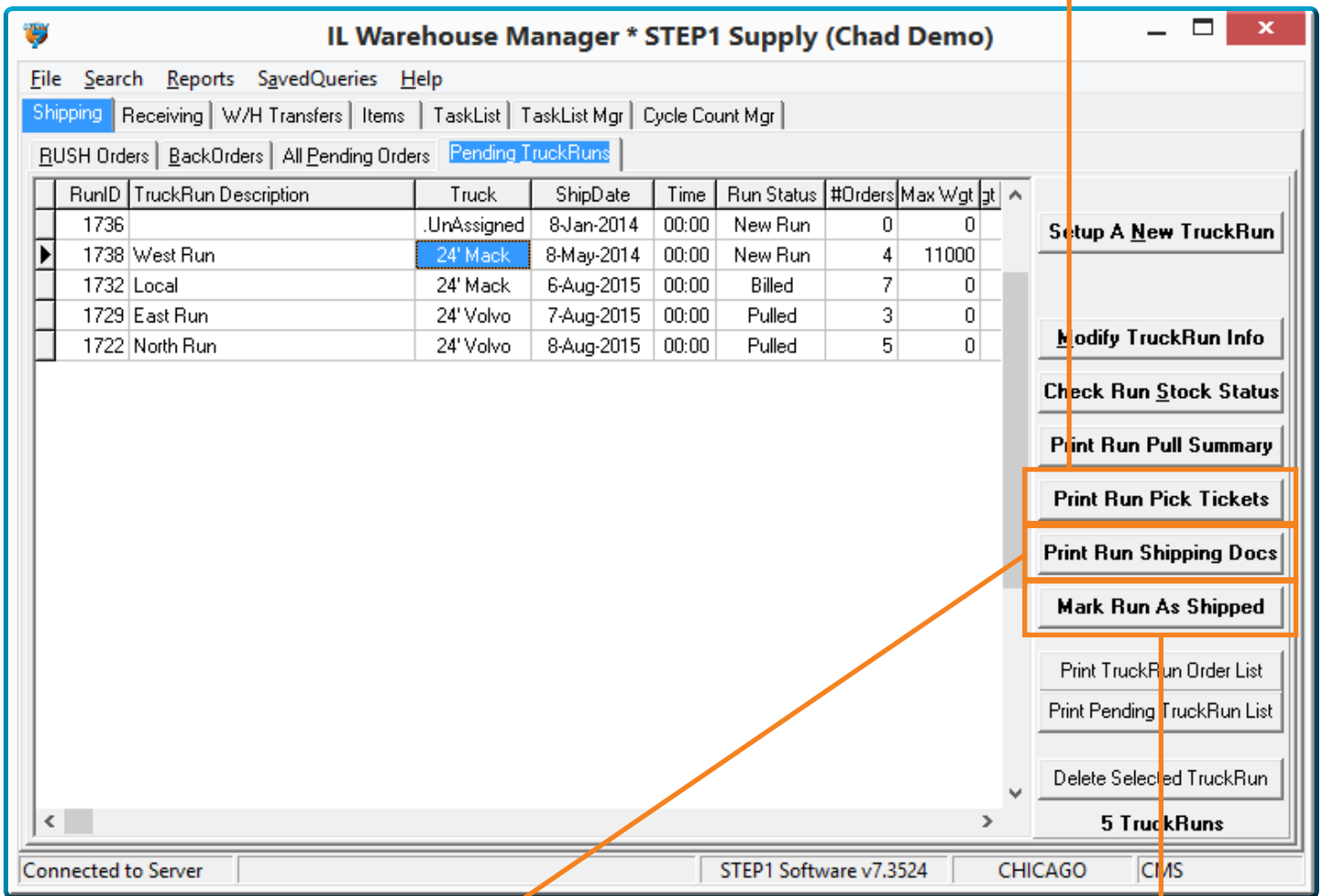
Click on the Print Run Shipping Docs Button to open the window pictured below. You will see that there are several options to choose from. just check the documents that apply for this truck run and click the Start Printing button.

Once the inventory is physically on the truck and ready to go we need to change the run status to shipped. To mark the highlighted truck run as shipped click this button.
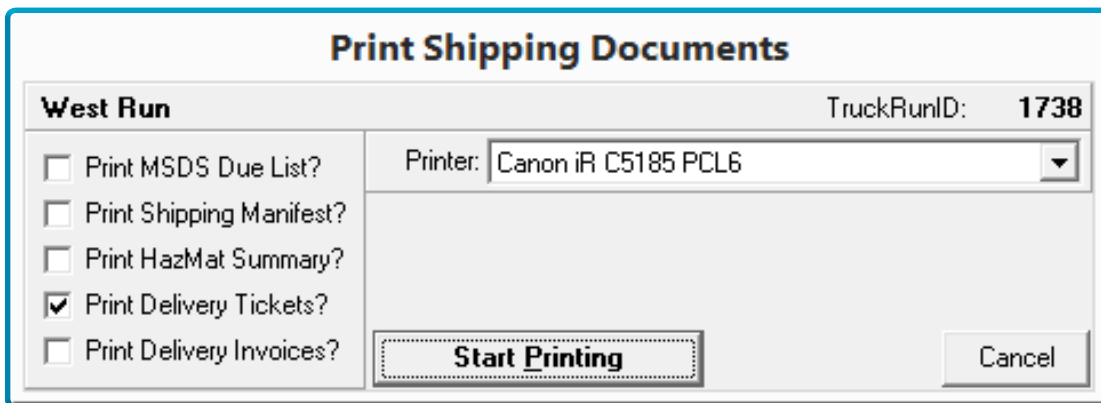
Clicking the Print TruckRun Order List button prints the entire list of orders that have been assigned to the highlighted truck run only.

The Print Pending TruckRun List just prints a list of the truck runs that have not yet shipped.

If you need to delete the highlighted truck run just click this button and then click yes in the confirm window.

In this section of the guide you will learn how to Wave Pull Your Invetory by Truck Run.

Once you've opened the Warehouse Module, Make sure that the shipping tab is open then click on the Pending TruckRuns tab to open the window below.

If your method of choice for getting the inventory from the warehouse shelf to the inside of your truck is to Wave Pull you will click on the Print Run Pull Summary button. Telling the system to print off a list of all the items from this truck run.

The small confirm window to the right will appear. (Before the system goes any further it checks to make sure this is what you really want to do) Click the Yes button to continue. The screen below and to the right will open so you can select a printer for the report to be sent to.
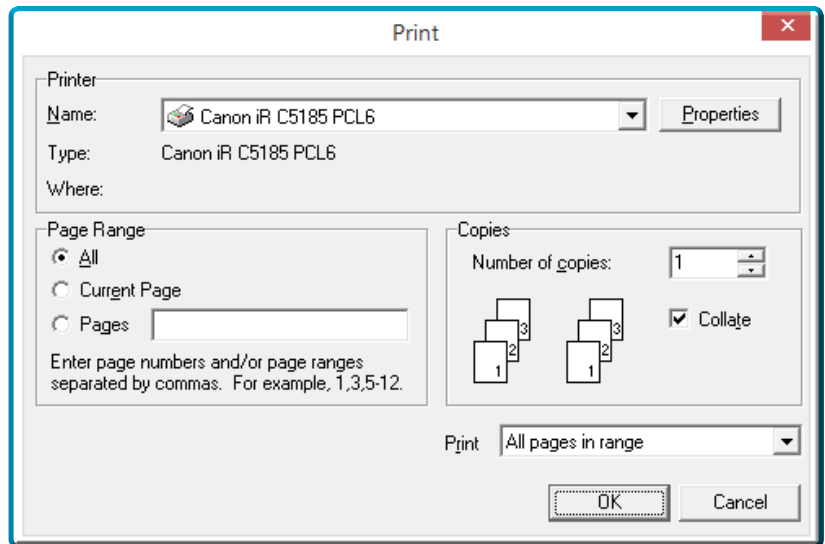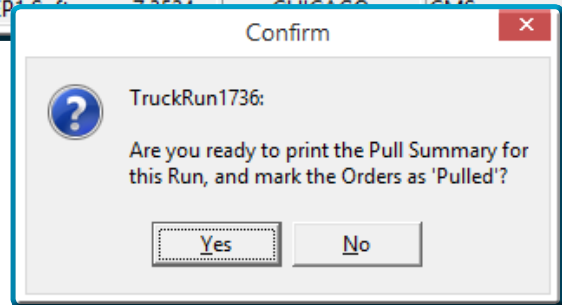
Now you've told the computer your sure you want to do this and then selected the printer to print to. What just printed is a list of the items that are included in this truck run. The quantities shown are total quantity for the truck run not the order. This helps you pull all of each item at the same time to reduce warehouse walking time. Now using the list that you just printed you can pull all the items needed for this run to a staging area before loading the truck, and without a lot of the back and forth time in the warehouse.
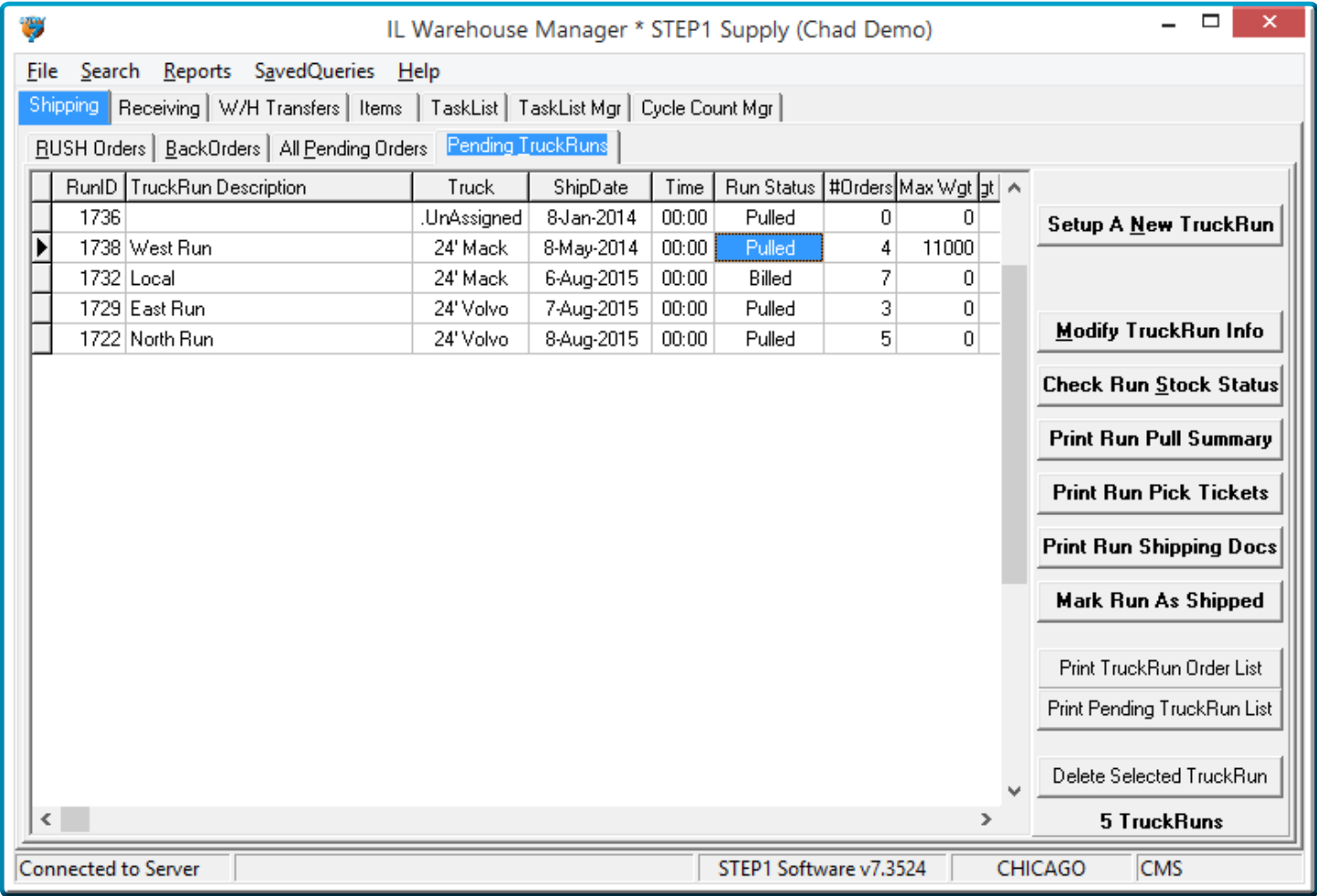
You will also notice that in the window pictured above that the Run Status has been changed to pulled.

In this section of the guide you will learn how to print all of your picking tickets as the orders come in.

Once you've opened the Warehouse Module, Make sure that the shipping tab is open then click on the All Pending Orders tab.

The View Order button allows you to have a look at the order if you need to. This window that opens does not allow you to make any changes to the order. (Changing order quantities is covered later in this guide.)

The Toggle Ready to Ship Flag button allows you to tell the system wether or not this order is ready to ship or not. If for what ever reason this order shouldn't ship yet but has a Y in the Ready column you can click this button to change it to an N so the order's shipping documentation won't print. Clicking the button works both ways, so if it is an N already you will change it back to a Y by clicking.

If for some reason you need to modify your routing of this order, clicking the Change order Delivery Route button opens up this new window. From here you can select from any of the delivery routes you have setup in your database. (Instructions on how to setup delivery routes can be found in the Table Setup Guide)

If you need to Print or Reprint your picking ticket for this order click the button to open the printer select screen. From here all you need to do is select which printer you want to send the ticket to and the number of copies you need to print.

Modifying your order quantities can easily be done here in Warehouse Manager. Click the button to open the screen shown here on the right. Highlight the number in the shipped column and type in the new number. Also if you plan to back-order the amount that your not shipping with this order type in that number in the back-order column.

Check this box in situations where there is an item needing to be back ordered and the customer prefers to receive their orders complete. Once you have all the stock needed to completely fill the order the system will allow the order to be shipped.

Select a ship date from the drop box if you must. Normally you would just leave this blank. It will get changed when you process your truck runs. Be aware that this number will become the invoice number.

Modify Pending Order Quantities

File

Pending Order 112541-2 [Save] [Cancel]

Bill To | Ship To | Instructions | Order Notes

Bradner Village HCC
505 N Bradner Avenue

Order Date: **9-Aug-2013**   Shipped: [▼]

Target Ship:

Marion   **IN   46952**

Salesman: **GJONAS**   P.O.#: FAX/Shelly
Status: **BackOrder**   Carrier: PSS Truck
Order Source: **ROSIE**   Freight: $0.00

☐ Set Order Status to 'BackOrderd'?
☑ **Ready To Ship?**
☑ **Ready To Bill?**

Line	T	ItemCode	Description	Ordered	Shipped	B/O	Price	Opt
1	I	SH101	Big Green Hair & Body Shampoo	4	4	0	9.09	b3
2	D		Gallon					

In this section type in a PO number if there isn't already a number assigned to this order. Same with the carrier line, just type one in if you need it. And finally you can enter a freight amount for this order.

Click this button if you want the status of the highlighted order to be changed to pulled once you have taken the items from the shelves.

IL Warehouse Manager * STEP1 Supply (Chad Demo)

File   Search   Reports   SavedQueries   Help

Shipping | Receiving | W/H Transfers | Items | TaskList | TaskList Mgr | Cycle Count Mgr |

RUSH Orders | BackOrders | All Pending Orders | Pending TruckRuns |

Customer	Order Date	Target Ship	Ready	Status	Route	RunID	Total Wgt
DJ's Pool	27-Jul-2013		Y	Will Call	.CPU	0	2
D J's Pool	27-Jul-2013		Y	Will Call	.CPU	0	0
Bradner Village HCC	9-Aug-2013		Y	BackOrder	AURORA	0	36
Linder Technical Services	10-Aug-2013		Y	New Order	UPS	0	0
Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	/ SETEC	0	0
Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	SBEND	0	8
St Maria Goretti	17-Aug-2013		Y	On Hold	Z GEOFF	0	2
St Maria Goretti	17-Aug-2013	17-Aug-2013	Y	PT Printed	Z GEOFF	0	1000
Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	SERVICE	0	0
St. Clair / Scottissue, Inc.	22-Aug-2013	24-Aug-2013	Y	PT Printed	.CPU	0	240
A & J Carpet & Janitorial	23-Aug-2013		Y	New Order	SERVICE	0	1829
Tipton Lakes Athletic Club	23-Aug-2013	29-Aug-2013	Y	Pulled	SERVICE	1726	68
Barth County Humane Society	24-Aug-2013		Y	Pulled	SERVICE	1726	89
Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	UPS	0	116
▶ Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	-98
Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	42
Hamilton Co Building & Grounds	24-Aug-2013	24-Aug-2013	Y	New Order	.CPU	0	12
Bynum's Steakhouse	25-Aug-2013		Y	PT Printed	SERVICE	0	105
Grant Blackford Mental Health	25-Aug-2013		Y	BackOrder	AURORA	0	46

View Order
Toggle ReadyToShip Flag
Change Order Delivery Route
Assign Order to a TruckRun
Remove Order from TruckRun
Mark Order As Pulled
(Re)Print Picking Ticket
(Re)Print Delivery Ticket
Modify Order Quantities
Mark Order As Shipped
Batch Print Picking Tickets

70 Orders

Connected to Server   STEP1 Software v7.3524   CHICAGO   CMS

Click this button once you have the items from the highlighted order on the truck. When this is done your stock on-hand levels will change to reflect the fact that the items are no longer in the warehouse. Regular stock levels will not change until the order has been invoiced.

To print out the picking tickets in batches click this button to open the window shown to the right. Simply select the option you would like to use and click OK. (When selecting to print picking tickets for a Delivery Route, the route code will appear at the bottom left corner of this screen. It is best to highlight an order that is on the route you plan on printing before you click the Batch print button)

V7 BASIC TRAINING PROGRAM

SYSTEM BASICS	GENERAL LEDGER
ORDER DESK	TABLE SETUP
WAREHOUSE SHIPPING	AR CUSTOMER SETUP
BILLING MANAGER	AP VENDOR SETUP
A/R MANAGER	INVENTORY SETUP
PURCHASING FOR BEGINNERS	REBATE MANAGER
WAREHOUSE RECEIVING	ORDER REVIEW
ACCOUNTS PAYABLE	CUSTOMER PRICE MANAGER
A/P CHECKS	SUPERVISOR'S CONSOLE

V7 ADVANCED TRAINING PROGRAM

ADVANCED CPM	REPORT MANAGER INTRO
ADVANCED PURCHASING	TASKLIST MANAGER
SALES MANAGER	KNOWLEDGEBASE
DISPENSER MANAGEMENT	LEAD TRACKING
QUERY MANAGER INTRO	

V7 OPTIONAL PRODUCT TRAINING PROGRAM

SERVICE DESK	CYCLE COUNT
WEB SALES REP	LAGASSE ITEM CONTROL
WEB CSS	DIMENSIONS BI & CRM
BANK REC	CATALOG BUILDER
REPORT BUILDER	POD SCAN
CORP ACCOUNT MANAGER	

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