v.7Training

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

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



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



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

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MOST MODULE TRAINING SESSIONS TAKE ABOUT AN HOUR

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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.

Ĩ	IL Warehouse Manager * STEP1 Supply (Chad	Demo)	_ 🗆 🗙							
1	<u>F</u> ile <u>S</u> earch <u>R</u> eports S <u>a</u> vedQueries <u>H</u> elp									
Γ	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 at 🗖	<u>,</u>							
	▶ 1736 .UnAssigned 8-Jan-2014 00:00 New Run 0	0	Setup A New TruckBun							
	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	Madifu TuushDus lafa							
			Moally Trucknun Info							
			Check Run <u>S</u> tock Status							
			Print Run Pull Summary							
			Print Run Pick Tickets							
		- 1	Print Run Shipping Docs							
			Mark Run As Shipped							
			Print TruckRun Order List							
			Print Pending TruckRun List							
			Delete Selected TruckRun							
	<	>	4 TruckRuns							
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💗 🛛 IL Ware	house M	anager * 9	STEP1	Supply	(Chad	Demo)		_ 🗆 🗙		
<u>F</u> ile <u>Search</u> <u>Reports</u> SavedQueries <u>H</u>	elp									
IL Warehouse Manager * STEP1 Supply (Chad Demo) - □ × Start Reports SavedQueries Help Start Reports Mark Transfers Items TaskList										
BUSH Orders BackOrders All Pending Orde	BUSH 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		Setup A New TruckBun		
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		Madifu Tauah Dua Jafa		
IL Warehouse Manager * STEP1 Supply (Chad Demo) Image: Comparison of the c										
								Check Run <u>S</u> tock Status		
								Print Run Pull Summary		
								Print Run Pick Tickets		
							1	Print Run Shipping Docs		
								Mark Run As Shipped		
	Bill Orders BackUrders All Pending Urders Truck ShipDate Time Run Status #Orders Max Wgt at At 1736 .UnAssigned 8-Jan-2014 00:00 New Run 0 0 1732 Local 24' Mack 6-Aug-2015 00:00 Pulled 3 0 1722 Loral 24' Volvo 7-Aug-2015 00:00 Pulled 3 0 1722 North Run 24' Volvo 8-Aug-2015 00:00 Pulled 3 0 1722 North Run 24' Volvo 8-Aug-2015 00:00 Pulled 5 0 1722 North Run 24' Volvo 8-Aug-2015 00:00 Pulled 5 0 1722 North Run 24' Volvo 8-Aug-2015 00:00 Pulled 5 0 1722 North Run 24' Volvo 8-Aug-2015 00:00 Pulled 5 0 1729 Modify TruckRun Info Check Run Status Print Run Pull Summary Print Run Pull Summary Print Run Shipping <td< td=""></td<>									
								Print Pending TruckRun List		
							,	Delete Selected TruckRun		
<						>		4 TruckRuns		
Connected to Server				STEP1 Softv	vare v7.35	524 (сні	CAGO 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 T	ruck	Run			
<u>File</u> <u>Search</u> <u>H</u> elp								
Bush Orders Pending Orders	BackOrders Fu	iture/ <u>H</u> old/WHTransfe	r Orders As	signed	to this <u>T</u> r	uckRun	S <u>e</u> quence	TruckRun ID: 1737
Customer Name	Order Date	Target Ship Ready	Status	Type	Route	RunID	TotWat 🔺	TruckRun Description:
DJ's Pool	27-Jul-2013	Y	Will Call	CS	.CPU	0	2	<u> </u>
D J's Pool	27-Jul-2013	Y	Will Call	IN	.CPU	0	0	Truck: .UnAssigned 💌
Bradner Village HCC	9-Aug-2013	Y	BackOrder	IN	AUROR	0	36	Ship Date: 4-May-2014 🗸
Tipton Cty Memorial Hospital	10-Aug-2013	Y	BackOrder	IN	W SETE	0	0	Ship Time: 00:00 HH:MM 24br
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	# Assigned Orders: 0
Advantage Floor Care Serv. I	nc 21-Aug-2013	Y	PT Printed	IN	SERVIC	0	0	Total ShipWgt: 0
A & J Carpet & Janitorial	23-Aug-2013	Y	New Order	IN	SERVIC	0	1829	Max Truck ShipWgt: 0
Squeaky Clean Professionals	24-Aug-2013	Y	PT Printed	CS	UPS	0	116	Total ShipCubes: 0
Bynum's Steakhouse	25-Aug-2013	Y	PT Printed	IN	SERVIC	0	105	Max Truck Cubes: 0
Grant Blackford Mental Healt	n 25-Aug-2013	Y	BackOrder	IN	AUROR	0	46	Assign Orders to TruckRun
Knights of Columbus	28-Aug-2013	Y	BackOrder	IN	UPS	0	6	All Orders for Selected Route
Lighthouse Assembly of God	28-Aug-2013	Y	BackOrder	IN	AUROR	0	37	Assign Selected Order To Run
Hamilton Co.Bldgs & Grnds. J	ail 29-Aug-2013	Y	BackOrder	IN	SERVIC	0	120	Assign All Orders on this List
Stoney Creek Play School	29-Aug-2013	Y	PT Printed	IN	SERVIC	0	0	Remove Orders from Run
Bayer Healthcare-Diagnostic:	29-Aug-2013	Y	BackOrder	IN	SERVIC	0	33	All Orders for Selected Route
Hamilton County Comm Corre	ctic 29-Aug-2013	Y	BackOrder	IN	SERVIC	0	2	Bemove Selected Order from Bun
ISU / Hullman Student Union	30-Aug-2013	Y	BackOrder	IN	UPS	0	72	Bemove All Orders on this List
Conner Prairie	30-Aug-2013	Y	BackOrder	IN	SERVIC	0	10	
Indiana Wesleyan Univ	1-Sep-2013	Y	BackOrder	IN	UPS	0	27 🗸	Assign Order to Another TruckRun
<							>	Change Order Delivery Route
Orde	List Options			rder St	atus Optio	ons		Toggle Order ReadyToShip Flag
Befresh List CL	ist All Pending Ord	lers (No DropShips/Qu	iotes) 🔽	Show	⊢'ReadyT PookΩra	oShip' () Ioro	rders Only	View Order
(* (nly List Orders No	t Assigned to a TruckF	Run	Show	CreditHo	ld Orders	<u>.</u> .	Shup Truck Rup Info
Select List Options, then (lick the 'Refre	sh List' Button.		Show	Future/H	iold/WH Drders	l ransfer	
To Sort or Search on a Column,	RightUlick on tha	t column.		SHOW	Service	Didels		30 Orders
Connected to Server				STE	P1 Extrar	net Softv	ware	

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 T	ruck	Run				
<u>F</u> ile	<u>Se</u> irch <u>H</u> elp									
Rush	Orders Pending Orders B.	ackOrders Fu	ture/Hold/WHTransfe	er Orders As	signed	to this Tr	uckRun	Sequence	TruckRun ID:	1737
	tomer Name	Order Date	Target Ship Ready	Status		Route	BunID	TotWat 🔺	TruckRun Description:	
► DJ'	s Pool	27-Jul-2013	Y	Will Call	CS	.CPU	0	2		
DJ	's Pool	27-Jul-2013	Y	Will Call	IN	.CPU	0	0	Truck: UnAssigne	ed 🔻
Bra	dner Village HCC	9-Aug-2013	Y	BackOrder	IN	AUROR	0	36	Ship Date: 4-May-2014	
Tip	ton Cty Memorial Hospital	- 10-Aug-2013	Y	BackOrder	IN	W SETE	0	0	Shin Time: 00.00 HI	H·MM 24br
Line	der Technical Services	10-Aug-2013	Y	New Order	IN	UPS	0	0		11.0109 2.401
Cor	nmunity Hospital/Ritter	14-Aug-2013	Y	BackOrder	IN	SBEND	0	8	# Assigned Orders:	n
Adv	vantage Floor Care Serv. Inc	21-Aug-2013	Y	PT Printed	IN	SERVIC	0	0	Total ShipWgt:	Ő
A &	J Carpet & Janitorial	23-Aug-2013	Y	New Order	IN	SERVIC	0	1829	Max Truck ShipWgt:	0
Squ	ieaky Clean Professionals	24-Aug-2013	Y	PT Printed	CS	UPS	0	116	Total ShipCubes:	0
Byr	ium's Steakhouse	25-Aug-2013	Y	PT Printed	IN	SERVIC	0	105	Max Truck Cubes:	0
Gra	nt Blackford Mental Health	25-Aug-2013	Y	BackOrder	IN	AUROR	0	46	Assign Orders to Tru	ickRun
Kni	ghts of Columbus	28-Aug-2013	Y	BackOrder	IN	UPS	0	6	All Orders for Selected	dRoute
Ligi	nthouse Assembly of God	28-Aug-2013	Y	BackOrder	IN	AUROR	0	37	Assign Selected Order	To Run
Har	nilton Co.Bldgs & Grnds. Jail	29-Aug-2013	Y	BackOrder	IN	SERVIC	0	120	Assign All Orders on t	his List
Sto	ney Creek Play School	29-Aug-2013	Y	PT Printed	IN	SERVIC	0	0	Remove Orders from	Run
Bay	er Healthcare-Diagnostics	29-Aug-2013	Y	BackOrder	IN	SERVIC	0	33	All Orders for Selected	d Route
Har	nilton County Comm Correctio	29-Aug-2013	Y	BackOrder	IN	SERVIC	0	2	Remove Selected Order	r from Run
ISU	7 Hullman Student Union	30-Aug-2013	Y	BackOrder	IN	UPS	0	72	Bemove All Orders on	this List
Cor	nner Prairie	30-Aug-2013	Y	BackOrder	IN	SERVIC	0	10		
Ind	ana Wesleyan Univ	1-Sep-2013	Y	BackOrder	IN	UPS	0	27 🗸	Assign Order to Another	TruckRun
<								>	Change Order Deliver	y Route
	⊏0rder Li	st Options			rder St	atus Optio	ons		Toggle Order ReadyTo	Ship Flag
R	efresh List	All Pending Ord	lers (No DropShips/Qu Massigned to a Truck	uotes)	Show	BackOrd	oship' U Jers	rders Unly	<u>V</u> iew Order	
Sele	ct List Options, then Clic	k the 'Befre	sh List' Button		Show	CreditHo Future/H	ld Order: fold/WH	s Transfer	<u>Save</u> TruckRun	Info
To So	ort or Search on a Column, Ri	ghtClick on tha	t column.	V	Show	Service	30 Orders			
Conne	cted to Server				STE	P1 Extra	net Soft	ware		

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 T	ruck	Run				
<u>F</u> ile <u>S</u> earch <u>H</u> elp									
Rush Orders Pending Orders Ba	ackOrders Fu	ture/Hold/WHTransfe	r Orders As	signed	to this Tr	uckRun	Sequence	TruckBun ID: 1737	
	Order Date	- Target Ship Beadu	Status		Boute	BunID	TotWat 🔺	TruckRun Description:	
Dul's Pool	27.Jul-2013		Will Call	1300	CPU	0	2		
Dul's Pool	27-Jul-2013	· · ·	Will Call	IN	CPU	0	0	Truck: UnAssigned	
Bradner Village HCC	9-Aug-2013	· · · · · · · · · · · · · · · · · · ·	BackOrder	IN	AUBOR	0	36	Shin Date: 4-Mau-2014	
Tipton Ctv Memorial Hospital	10-Aug-2013	Y	BackOrder	IN	W SETE	0	0	Ship Time: 00:00	
Linder Technical Services	10-Aug-2013	Y	New Order	IN	UPS	0	0	Truck Due Current	
Community Hospital/Ritter		Y	BackOrder	IN	SBEND	0	8	# Assigned Orders: 0	
Advantage Floor Care Serv. Inc	21-Aug-2013	Y	PT Printed	IN	SERVIC	0	0	Total ShipWat: 0	
A & J Carpet & Janitorial	23-Aug-2013	Y	New Order	IN	SERVIC	0	1829	Max Truck ShipWgt: 0	
Squeaky Clean Professionals	24-Aug-2013	Y	PT Printed	CS	UPS	0	116	Total ShipCubes: 0	
Bynum's Steakhouse	25-Aug-2013	Y	PT Printed	IN	SERVIC	0	105	Max Truck Cubes: 0	
Grant Blackford Mental Health	25-Aug-2013	Y	BackOrder	IN	AUROR	0	46	Assign Orders to TruckRun	
Knights of Columbus	28-Aug-2013	Y	BackOrder	IN	UPS	0	6	All Orders for Selected Route	
Lighthouse Assembly of God	28-Aug-2013	Y	BackOrder	IN	AUROR	0	37	Assign Selected Order To Run	
📕 Hamilton Co.Bldgs & Grnds.Jail	29-Aug-2013	Y	BackOrder	IN	SERVIC	0	120	Assign All Orders on this List	
Stoney Creek Play School	29-Aug-2013	Y	PT Printed	IN	SERVIC	0	0	Remove Orders from Run	
Bayer Healthcare-Diagnostics	29-Aug-2013	Y	BackOrder	IN	SERVIC	0	33	All Orders for Selected Route	
Hamilton County Comm Correction	29-Aug-2013	Y	BackOrder	IN	SERVIC	0	2	Remove Selected Order from Run	
ISU / Hullman Student Union	30-Aug-2013	Y	BackOrder	IN	UPS	0	72	Bemove All Orders on this List	
Conner Prairie	30-Aug-2013	Y	BackOrder	IN	SERVIC	0	10		
Indiana Wesleyan Univ	1-Sep-2013	Y	BackOrder	IN	UPS	0	27 🗸	Assign Order to Another TruckRun	
<							>	Change Order Delivery Route	
⊏0rder Li:	st Options		[2	rder St	atus Optio	ons		Toggle Order ReadyToShip Flag	
Befresh List C List	All Pending Ord	lers (No DropShips/Qu	iotes) 🔽	Show	r Ready I i Black Ord	oShip' Ui Iers	rders Unly	⊻iew Order	
Only List Orders Not Assigned to a TruckRun Show CreditHold Orders Save									
To Sort or Search on a Column, Ri	ghtClick on tha	t column.	v	Show	Service	Orders		30 Orders	
Connected to Server				STE	P1 Extrar	net Softv	ware		

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.

		S	etup	A New T	ruck	Run				
File Search Help										
Bush Orders Pending Orders B	ackOrders Fut	ure/Hold/WH	l Transfe	r Drders As	sianed	to this Tru	JckBun	Sequence	TruckBun ID:	1737
	Order Date	Target Ship	Roodul	Chatua		Pouto	PupiD	Totulat A	TruckRun Desc	ription:
Dul's Pool	27.Jul-2013	raigecomp	Y	Will Call	rype CS	CPU	0	2		
Dul's Pool	27-Jul-2013		Y	Will Call	IN	CPU	0	0	Truck:	nAssianed 🔹
Bradner Village HCC	9-Aug-2013		Ŷ	BackOrder	IN		0	36	Shin Date: 4	dau-2014 -
Tipton Ctu Memorial Hospital	10-Aug-2013		Ŷ	BackOrder	IN	WISETE	0	0		
Linder Technical Services	10-Aug-2013		Ý	New Order	IN	UPS	0	0		:00 HH:MM 24hr
Community Hospital/Bitter	14-Aug-2013		Ŷ	BackOrder	IN	SBEND	0	8	TruckHun S	ummary Idawi O
Advantage Floor Care Serv. Inc	21-Aug-2013		Ŷ	PT Printed	IN	SERVIC	0	0	# Assigned o Total Shi	Wat: 0
A & J Carpet & Janitorial	23-Aua-2013		Ŷ	New Order	IN	SERVIC	0	1829	Max Truck Shi	Wat: 0
Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	CS	UPS	0	116	Total ShipC	ubes: 0
Bynum's Steakhouse	25-Aug-2013		Y	PT Printed	IN	SERVIC	0	105	Max Truck C	ubes: 0
Grant Blackford Mental Health	25-Aug-2013		Y	BackOrder	IN	AUROR	0	46	Assign Orde	s to TruckRun
Knights of Columbus	28-Aug-2013		Y	BackOrder	IN	UPS	0	6	All Orders fo	Selected Route
Lighthouse Assembly of God	28-Aug-2013		Y	BackOrder	IN	AUROR	0	37	Assign Selec	ted Order To Run
Hamilton Co.Bldgs & Grnds. Jail	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	120	Assign All O	rders on this List
Stoney Creek Play School	29-Aug-2013		Y	PT Printed	IN	SERVIC	0	0	Bemove Ord	ere from Bun
Bayer Healthcare-Diagnostics	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	33	All Orders fo	r Selected Boute
Hamilton County Comm Correction	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	2	Remove Selec	ted Order from Run
ISU / Hullman Student Union	30-Aug-2013		Y	BackOrder	IN	UPS	0	72		
Conner Prairie	30-Aug-2013		Y	BackOrder	IN	SERVIC	0	10		Diders on this List
Indiana Wesleyan Univ	1-Sep-2013		Y	BackOrder	IN	UPS	0	27 🗸	Assign Order to	Another TruckRun
<								>	Change Ord	er Delivery Route
-Order Li	4 Online				rder St	atus Optio	ns		Toggle Order	ReadyToShip Flag
Befresh List C List	All Pending Ord	ers (No DropS	ihips/Qu	otes)	Show	(ReadyT)	oShip' Or	ders Only	Vie	w Order
• Only	List Orders Not	Assigned to a	a TruckF	Run 🗍 💾	Show	· Backura · CreditHol	ers Id Arders			
Select List Options, then Clic To Sort or Search on a Column, Rig	k the 'Refre s ghtClick on that	h List' Butt column.	on.		Show Show	Future/H Service (old/WH Drders	Transfer	<u>Save Tr</u> 30	Orders
Connected to Server					STE	P1 Extran	et Softv	vare		
, ,								,	_	

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.

			S	etup	A New	Truc	kRun			
	<u>F</u> ile <u>S</u> earch <u>H</u> elp									
	Rush Orders Pending Orders Ba	ackOrders Fu	ture/ <u>H</u> old/WH	HT ransfe	er Orders A	Assigne	d to this <u>T</u> r	uckRun	S <u>e</u> quence	Tru <mark>ckRun ID: 1737</mark>
ſ	Customer Name	Order Date	Target Ship	Ready	Status	Туре	Route	RunID	TotWgt 🔺	TruckRun Description:
	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	Truck: UnAssigned 🗨
	Bradner Village HCC	9-Aug-2013		Y	BackOrde	er IN	AUROR	0	36	Ship Date: 4-May-2014 🛛 👻
	Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrde	er IN	W SETE	0	0	Ship Time: 00:00 HH:MM 24hr
	Linder Technical Services	10-Aug-2013		Y	New Orde	er IN	UPS	0	0	TuckBun Summary
	Community Hospital/Ritter	14-Aug-2013		Y	BackOrde	er IN	SBEND	0	8	Assigned Orders: 0
	Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printe	d IN	SERVIC	0	0	Total ShipWgt: 0
	A & J Carpet & Janitorial	23-Aug-2013		Y	New Orde	er IN	SERVIC	0	1829	M <mark>ax Truck ShipWgt: 0</mark>
	Squeaky Clean Professionals	24-Aug-2013		Y	PT Printe	d CS	UPS	0	116	Total ShipCubes: 0
	Bynum's Steakhouse	25-Aug-2013		Y	PT Printe	d IN	SERVIC	0	105	Max Truck Cubes: 0
	Grant Blackford Mental Health	25-Aug-2013		Y	BackOrde	er IN	AUROR	0	46	Assign Orders to TruckRun
	Knights of Columbus	28-Aug-2013		Y	BackOrde	er IN	UPS	0	6	All Orders for Selected Route
	Lighthouse Assembly of God	28-Aug-2013		Y	BackOrde	er IN	AUROR	0	37	Assign Selected Order To Run
	Hamilton Co.Bldgs & Grnds.Jail	29-Aug-2013		Y	BackOrde	er IN	SERVIC	0	120	Assign All Orders on this List
	Stoney Creek Play School	29-Aug-2013		Y	PT Printe	d IN	SERVIC	0	0	Remove Orders from Run
	Bayer Healthcare-Diagnostics	29-Aug-2013		Y	BackOrde	er IN	SERVIC	0	33	All Orders for Selected Route
	Hamilton County Comm Correctic	29-Aug-2013		Y	BackOrde	er IN	SERVIC	0	2	Remove Selected Order from Run
	ISU / Hullman Student Union	30-Aug-2013		Y	BackOrde	er IN	UPS	0	72	Remove All Orders on this List
	Conner Prairie	30-Aug-2013		Y	BackOrde	er IN	SERVIC	0	10	
	Indiana Wesleyan Univ	1-Sep-2013		Y	BackOrde	er IN	UPS	0	27 🗸	Assign Order to Another TruckRun
I	<								>	Change Order Delivery Route
6	0.1.11	10 C				Urder S	tatus Upti	ons	rdere Onlu	Toggle Order ReadyToShip Flag
	*	Select	TruckRu	n				×	Ideis Only	View Order
l	<u>O</u> ptions							er: /H	s Transfer	Save TruckRun Info
l	RunID TruckRunDesc		Truck	Sł	nipDate T	Time	Status	^		30.0rders
ŕ	▶ 1736		.UnAssigne	ed 8J	an-2014 0	0:00	New Run			
Į	1729 East Run		24' Volvo	7-A	ug-2015 0	0:00	Pulled	ft	ware	
1	1722 North Run		24' Volvo	8-A	ug-2015 0	0:00	Pulled			
									Within the also selected anothe already system. to open Just selected want the because	his truck run you can ect orders to be assigned er truck run that has been setup in your Click the button above the screen on the left. ect the truck run that you e order you selected to

 Select Deliver Options Delivery Route Description Customer Pick-up Salesman 	n Route	RouteCo CPU Z BOBS Z GEOFI Z MIKE Z PAUL Z ROB Z BOB Z JERRY Z ANN Z CHRIS COURIE	×	Clic rou car clic	ck this te. Thi i just c k to m	butto is scr hoos ake t	on to cha een to t e one fi he char	ange he le om f ige.	e to order o eft will ope the list and	lelivery n and you l double-
Freight carrier		R&L		Truck	cRun					
Freight carrier		OVERNI	TE							
Freight carrier		CON WA	4Y 🗸 🎽	ssigned	l to this <u>T</u> ru	uckRun	S <u>e</u> quence	Truc	kRun ID:	1737
<			> .:	Туре	Route	RunID	TotWgt 🔺		kRun Description	
,				CS	.CPU	0	2			
D J's Pool	27-Jul-2013	Y	Will Call	IN	.CPU	0	0		Truck: UnAssi	gned 🔻
Bradner Village HCC	9-Aug-2013	Y	BackOrder	r IN	AUROR	0	36	Ship	p Date: 4-May-2	2014 🗾
Lipton Uty Memorial Hospital	10-Aug-2013	Y	BackUrder	r IN . DN	W SETE	0	0	Ship	p Time: 00:00	HH:MM 24hr
Community Hospital /Pitter	10-Aug-2013	T V	ReakOrder	r IN 7 IN	CDENID	0	0	Tu	uckRun Summa	ary
Advantage Floor Care Serv. Inc.	21-Aug-2013	I Y	PT Printed		SERVIC	0	0	Ŧ	Assigned Orders: Total Skiplu (at:	0
A & L Carnet & Janitorial	23-Aug-2013	Y	New Order	r IN	SERVIC	0	1829	Ma	x Truck ShinWat	0
Squeaky Clean Professionals	24-Aug-2013		PT Printed		UPS	0	116		Total ShipCubes:	Ő
Bynum's Steakhouse	25-Aug-2013		PT Printed	I IN	SERVIC	0	105	M	lax Truck Cubes:	0
Grant Blackford Mental Health	25-Aug-2013		BackOrder	r IN	AUROR	0	46	As	sign Orders to	TruckRun
Knights of Columbus	28-Aug-2013		BackOrder	r IN	UPS	0	6	ļ A	All Orders for Sele	cted Route
Lighthouse Assembly of God	28-Aug-2013	Y	BackOrder	r IN	AUROR	0	37	Δ	ssign Selected O	rder To Run
Hamilton Co.Bldgs & Grnds.Jail	29-Aug-2013	Υ.	BackOrde	r IN	SERVIC	0	120	1	Assign All Orders	on this List
Stoney Creek Play School	29-Aug-2013	¥	PT Printed	I IN	SERVIC	0	0	Re	move Orders f	rom Run
Bayer Healthcare-Diagnostics	29-Aug-2013	У	BackOrder	r IN	SERVIC	0	33	1	All Orders for Sele	cted Route
Hamilton County Comm Correction	29-Aug-2013	Y	BackOrder	r IN	SERVIC	0	2	Re	move Selected O	rder from Run
ISU / Hullman Student Union	30-Aug-2013	Y	BackOrder	r IN	UPS	0	72	F	Remove All Order:	s on this List
Conner Prairie	30-Aug-2013	<u>¥</u>	BackOrder	r IN	SERVIC	0	10			
Indiana Wesleyan Univ	1-Sep-2013	¥	BackOrde	r IN	UPS	0	27 ¥	Ais	ian Urder to Anot	her TruckRun
<				Dedae Ci	ahus Oatia		>		hange Urder Del	Ivery Route
Order Li	Order List Options					ns Ship' Or	rders Only		ggle Urder Read	yl oShip Flag
Refresh List	All Pending Urders List Orders Not As	No DropShip <mark>e</mark> / signed to a Truc	Quotes]	Show	v BackÓrd	ers			<u>V</u> iew Urc	ler
Coloot Liet Ortions, the Cf.	List orders NOCAS	ist Dutter		Show Show	/ CreditHol / Euture/H	d Urders old AwH	: Transfer		Save TruckR	un Info
To Sort or Search on a Column, Ri	ghtClick on that col	umn.		Show	V Service (Orders		-	30 Orde	rs
Connected to Server				STE	P1 Extran	et Softv	vare	4		

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.

											_
			S	etup	A New T	ruck	Run				
<u>F</u> ile <u>S</u> earch <u>H</u> e	elp										
Rush Orders Pend	ding Orders B.	ackOrders Fu	ture/ <u>H</u> old/WH	lTransfe	er Orders As:	signed	to this <u>T</u> r	uckRun	S <u>e</u> quence	TruckRun ID: 1	737
Customer Name		Order Date	Target Ship	Ready	Status	Туре	Route	RunID	TotWgt 🔺	TruckRun Description:	
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	Truck: UnAssigned	•
Bradner Village H	ICC	9-Aug-2013		Y	BackOrder	IN	AUROR	0	36	Ship Date: 4-May-2014	•
Tipton Cty Memor	rial Hospital	10-Aug-2013		Y	BackOrder	IN	W SETE	0	0	Ship Time: 00:00 HH:MM	24hr
Linder Technical	Services	10-Aug-2013		Y	New Order	IN	UPS	0	0	TruckBun Summary	
Community Hospi	ital/Ritter	14-Aug-2013		Y	BackOrder	IN	SBEND	0	8	# Assigned Orders:	0
Advantage Floor	Care Serv. Inc	21-Aug-2013		Y	PT Printed	IN	SERVIC	0	0	Total ShipWgt:	0
A & J Carpet & Ja	nitorial	23-Aug-2013		Y	New Order	IN	SERVIC	0	1829	Max Truck ShipWgt:	0
Squeaky Clean P	Professionals	24-Aug-2013		Y	PT Printed	CS	UPS	0	116	Total ShipCubes:	0
Bynum's Steakho	ouse	25-Aug-2013		Y	PT Printed	IN	SERVIC	0	105	Max Truck Cubes:	0
Grant Blackford N	vlental Health	25-Aug-2013		Y	BackOrder	IN	AUROR	0	46	Assign Orders to TruckRu	in j
Knights of Columb	bus	28-Aug-2013		Y	BackOrder	IN	UPS	0	6	All Orders for Selected Rout	e
Lighthouse Asser	mbly of God	28-Aug-2013		Y	BackOrder	IN	AUROR	0	37	Assign Selected Order To Ru	in
Hamilton Co.Bldg	s & Grnds. Jail	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	120	Assign All Orders on this List	t 🔤
Stoney Creek Pla	iy School	29-Aug-2013		Y	PT Printed	IN	SERVIC	0	0	Femove Orders from Run	
Bayer Healthcare	-Diagnostics	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	33	All Orders for Selected Rout	e
Hamilton County	Comm Correctio	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	2	Femove Selected Order from F	Run
ISU / Hullman St	udent Union	30-Aug-2013		Y	BackOrder	IN	UPS	0	72	Bemove All Orders on this Li	et.
Conner Prairie		30-Aug-2013		Y	BackOrder	IN	SERVIC	0	10		<u> </u>
Indiana Wesleyar	n Univ	1-Sep-2013		Y	BackOrder	IN	UPS	0	27 🗸	Assign Order to Another Truck	Run
<									>	Change Order Delivery Rout	e
	⊏0rder Li	et Optione				der St	atus Optio	ons		oggle Order ReadyToShip Fl	ag
Refresh List C List All Pending Orders (No DropShips/Quotes)										<u>V</u> iew Order	
	Only List Orders Not Assigned to a TruckRun Show CreditHold Orders Show CreditHold Orders										
To Sort or Search of	ons, then Clic on a Column, Ri	ghtClick on that	sn List' Butto t column.	on.	~	Show	Service	Orders	Tansie	30 Orders	
Connected to Serve	er					STE	P1 Extrar	net Softv	vare		

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

Ÿ		IL War	ehouse M	anager * 9	STEP1	Supply	(Chad	Demo)		_ 🗆 🗙
<u>F</u> ile	e <u>S</u> earch <u>R</u> eports	s S <u>a</u> vedQueries <u>H</u>	<u>l</u> elp							
Sh	ipping Receiving V	V/H Transfers Items	TaskList T	askList Mgr 🛛 C	Cycle Co	unt Mgr				
В	USH Orders BackOr	ders All Pending Orde	ers Pendina T	ruckRuns		- 1				
			Truck	ShipDate	Time	Due Statue	#Ordere	Maultiatat		1
	1736	escription	Lin <u>Assigned</u>	Shipbate 8-Jan-2014		New Bun	HOIDEIS N		-	Colored New Tool Day
Þ	1738 West Bun		24' Mack	8-May-2014	00:00	New Run	0	11000	-	Setup A New TruckHun
ŕ	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		<u>M</u> odify TruckRun Info
										Check Run <u>S</u> tock Status
										Print Run Pull Summary
										Print Run Pick Tickets
										Print Run Shipping Docs
									Π	Mark Run As Shipped
										Print TruckRun Order List
										Print Pending TruckRun List
									~	Delete Selected TruckRun
<	:							>		5 TruckRuns
Cor	nnected to Server					STEP1 Softw	/are v7.3	524	сні	CAGO CMS

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.

		Modify	TruckRu	n Informa	tion			
<u>F</u> ile <u>S</u> earch <u>H</u> elp								
Rush Orders Pending O	rders BackOrders	Future/ <u>H</u> old/WHTra	nsfer Orders	Assigned to this	TruckRun	Sequence	TruckRun ID:	1738
Seq Customer Name	0) ider Date Target Sh	ip Ready S	Status Type	Route To	tWgt Cube	TruckRun Description:	
							West Run	
							Truck: 24' Mack	
							Ship Date: 8-May-2014	-
							Ship Time: 00:00 HH:	MM 24hr
							TruckRun Summary	
							# Assigned Orders:	0
							Max Truck ShipWot:	11000
							Total ShipCubes:	0
							Max Truck Cubes:	0
								3.un
							All Orders for Selected F	Boute
							Remove Selected Order fr	om Run
							Remove All Orders on th	is List
							Assign Order to Another Tr	uckRun
							Change Order Delivery F	Route
							Toggle Order ReadyToSh	ip Flag
							⊻iew Order	
							<u>Save TruckRun In</u>	ifo
<						>	0 Orders	
Connected to Server				STEP1 Ext	ranet Softw	/are		

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	
<u>F</u> ile <u>S</u> earch <u>H</u> elp		
Rush Orders Pending O	rders BackOrders Future/Hold/wHTransfer Orders Assigned to this TruckBurt Sequence TruckBun ID:	1738
Seq Customer Name	Order Date Target Ship Ready Status Type Route TotWgt Cube	tion:
	West Run	
		Mack _▼
	Ship Date: 8-M	ay-2014 ▼
	TruckBun Su	
	# Assigned Or	ers: O
	Total Ship	/gt: 0 /gt: 11000
	Total ShipCu	bes: 0
	Max Truck Cu	les: O
	-Remove Orde	ers from Run
	All Orders for	Selected Route
	Remove Select	ed Order from Run
		rders on this List
	Assign Order to	Another TruckRun
	Change Orde	Delivery Route
		u Order
	<u>Save Tru</u>	ckRun nto
		Irders
Connected to Server	STEP1 Extranet Software	
ick this button if y ick run to a differ e available runs y	you want to move this order from this ent run. A window containing a list of will open up for you to select from.	
Click thi	s button if you want to change the highlighted	
order's	delivery route. A window containing a list of the	
availabl	e 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	/iew the
	highlighted order. (Opens a new	v 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.

		Mod	ify Tr	uckRun	Info	rmatio	on				
<u>F</u> ile <u>S</u> earch <u>H</u> elp											
Rush Orders Pending Orders B.	ackOrders Fu	ture/ <u>H</u> old/WH	Transfe	r Orders As:	signed	to this <u>T</u> re	uckRun	S <u>e</u> quence	TruckRun ID:		1738
Customer Name	Order Date	Target Ship	Ready	Status	Туре	Route	RunID	TotWgt 🔺	TruckRun Des	ription:	
DJ's Pool	27-Jul-2013		Y	Will Call	CS	.CPU	0	2	West Run		
D J's Pool	27-Jul-2013		Y	Will Call	IN	.CPU	0	0	Truck: 2	l' Mack	•
Bradner Village HCC	9-Aug-2013		Y	BackOrder	IN	AUROR	0	36	Ship Date: 8	May-2014	-
Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	IN	W SETE	0	0	Ship Time:	<u>00 нн</u>	I·MM 24hr
Linder Technical Services	10-Aug-2013		Y	New Order	IN	UPS	0	0		ummaru	
Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	IN	SBEND	0	8	# Assigned (rders:	n
Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	IN	SERVIC	0	0	Total Sh	oWqt:	Ő
A & J Carpet & Janitorial	23-Aug-2013		Y	New Order	IN	SERVIC	0	1829	Max Truck Sh	oWgt:	11000
Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	CS	UPS	0	116	Total Ship	ubes:	0
Bynum's Steakhouse	25-Aug-2013		Y	PT Printed	IN	SERVIC	0	105	Max Truck (ubes:	0
Grant Blackford Mental Health	25-Aug-2013		Y	BackOrder	IN	AUROR	0	46	-Assign Orde	rs to Tru	ckRun
Knights of Columbus	28-Aug-2013		Y	BackOrder	IN	UPS	0	6	All Orders fo	or Selected	Route
Lighthouse Assembly of God	28-Aug-2013		Y	BackOrder	IN	AUROR	0	37	Assign Selec	ted Order	ToRun
Hamilton Co.Bldgs & Grnds.Jail	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	120	Assign All ()rders on th	nis List
Stoney Creek Play School	29-Aug-2013		Y	PT Printed	IN	SERVIC	0	0	Bemove Or	ders from	Bun
Bayer Healthcare-Diagnostics	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	33	All Orders fo	n Selected	Boute
Hamilton County Comm Correctio	29-Aug-2013		Y	BackOrder	IN	SERVIC	0	2	Bemove Sele	nted Order	from Bun
ISU / Hullman Student Union	30-Aug-2013		Y	BackOrder	IN	UPS	0	72	Remove All	Orders on	this List
Conner Prairie	30-Aug-2013		Y	BackOrder	IN	SERVIC	0	10		orders on	
🔜 Indiana Wesleyan Univ	1-Sep-2013		Y	BackOrder	IN	UPS	0	27 🗸	Assign Order t	o Another 1	TruckRun
<								>	Change Ord	ler Delivery	Route
—Order Li	et Optione				rder St	atus Optic	ons		Toggle Order	ReadyTo9	ihip Flag
Befresh List C List	All Pending Ord	lers (No DropS	hips/Qu	iotes)	Show	'ReadyTi ReadyDid	oShip' Or Ioro	rders Only	Vie	ew Order	
• Only	List Orders No	t Assigned to a	a TruckF	Run 🛛	Show	CreditHo	iers Id Orders				1
Select List Options, then Clic	k the 'Refre	sh List' Butte	on.		Show	Future/H	lold/WH	Transfer	<u>Save Tr</u>	uckRun	nfo
To Sort or Search on a Column, RightClick on that column.											
Connected to Server STEP1 Extranet Software											

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.

🏺 C	Check TruckRun Item Stock Status													
<u>F</u> ile <u>S</u> earch <u>H</u> elp														
West Run	West Run RuniD: 1738													
Item Stock Summary Item Stock Detail														
Item Description Type StockStatus StockOnHand Available # Ordered # Ship # B/O														
MOTOR TOP UZ774	Р	OUT Of Stock	0	-1	1	0	1							
1 Ply Jumbo Tissue	1	OUT Of Stock	0	-1	1	1	0							
MOTOR COVER - UL APPROVED	Р	OUT Of Stock	0	-1	1	0	1							
Pristine II Cleaner/Sealer	I	Low Stock	3	-3	2	2	0	1						
View Item Stock Detail	ock Si	ummary Options					4 Iter	ms						
Item Status <u>Check</u> Print/SaveToFile	Show Show Show	Out-Of-Stock It Low-Stock Item In-Stock Items	ems Is											

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).

💗 Che	ck TruckRun It	em Stock S	Status		×
<u>F</u> ile <u>S</u> earch <u>H</u> elp					
West Run				R <mark>u</mark> r	nID: 1738
Item Stock Summary Item Stock Detail					
MOTOR TOP UZ774		AD1406622010	OnHand: O	Avai <mark>l</mark> at	ble: - 1
CustomerName C C Dingmans Sporting Goods A 19)rderDate TargetShip 3-Mar-2015 24-Mar-201	b <mark>#Ordered</mark> # 5 1	Ship # B/O ^ 0 1	Item Stal	tus <u>C</u> heck
				⊻iew	Order
				Modify (Irder Qtys
				Remove Or	der from Bun
			×	1.0	rdare
				10	
Clicking the Modify Order Qtys but	ton opens				
a new window that looks similar to	the the				
the same capabilities as the one se	een earlier				
in this guide) It allows you to chang	ge Quantity	highlighter	is last button v	e truck rur	e ine n vou have
Shipped and Quantity Back Ordere	ed for this	haanswark			i you nave

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item on the highlighted order.

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.

Print Shipping Documents											
West Run		TruckRunID:	1738								
☐ Print MSDS Due List?	Printer: Canon iR C5185 PCL6		•								
Print Shipping Manifest?											
Print HazMat Summary?											
✓ Print Delivery Tickets?											
Print Delivery Invoices?	Start Printing		Cancel								

Clicking the Print TruckRun Order List button prints the entire list of orders that have been assigned to the highlighted truck run only.

File Search Reports SavedQueries Shipping Receiving W/H Transfers Item RUSH Orders BackOrders All Pending Orders RunID TruckRun Description 1736 1738 West Run 1732 Local 1729 East Run 1722 North Run	rehouse M Help s TaskList T ders Pending T Truck .UnAssigned 24' Mack 24' Mack 24' Volvo 24' Volvo	anager * \$ askList Mgr 0 uckRuns ShipDate 8Jan-2014 8-May-2014 6-Aug-2015 7-Aug-2015 8-Aug-2015	Cycle Co Time 00:00 00:00 00:00 00:00	Run Status Run Status New Run New Run Billed Pulled	(Chad #Orders 0 4 7 3 5	Demo)	Setup A Ne w Tru Modify Tru & Ru Check Run Stock Print Run P ull Su Print Run F ick T Print Run Sl ippir Mark Run As St	n Info Status immary ickets g Docs
<							Print TruckRun Ur Print Pending Truck Delete Selected Tru 5 TruckRu	der List Run List uckRun
Connected to Server				STEP1 Softv	vare v7.3	524 CH	HICAGO CMS	
The Print Pending TruckRun L ist of the truck runs that have	ist just prin not yet shi	ts a oped.	- - -	f you nee	ed to c	lelete the	highlighted tru	ck run

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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.

Ÿ		IL	Warehouse	Manager *	STEP1	Supply (Cl	nad Der	mo)		_ 🗆 🗙			
<u>F</u> il	e <u>S</u> eard	:h <u>R</u> eports S <u>a</u> vedQueries <u>H</u>	elp										
Sł	ipping F	Receiving W/H Transfers Items	TaskList T	askList Mgr 🛛 C	ycle Co	unt Mgr							
В	BUSH Orders BackOrders All Pending Orders Pending TruckRuns												
	RunID	TruckRun Description	Truck	ShipDate	Time	Run Status	#Orders	Max Wot ot	~				
∣►	1736		.UnAssigned	8-Jan-2014	00:00	New Run	0	0		Setup A New TruckBun			
	1738	West Run	24' Mack	8-May-2014	00:00	New Run	4	11000					
	1732	Local	24' Mack	6-Aug-2015	00:00	Billed	7	0					
L	1729	East Run	24' Volvo	7-Aug-2015	00:00	Pulled	3	0		N. F. T. I.B. L.C.			
	1722	North Run	24' Volvo	8-Aug-2015	00:00	Pulled	5	0		Modify TruckHun Info			
	Check Run <u>S</u> tock 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			
<								>		5 TruckRuns			
Cor	nected	to Server				STEP1 Softw	/are v7.3	524 (сні	CAGO CMS			

۳	(IL)	Warehouse	Manager *	STEP1	Supply (Cl	had Der	mo)	_ 🗆 🗙						
Ei	le <u>S</u> earch <u>R</u> eports S <u>a</u> vedQueries <u>H</u> e	elp												
S	hipping Receiving W/H Transfers I Items	TaskList T	askList Mgr 🛛 C	ycle Co	unt Mgr									
E	BUSH Orders BackOrders All Pending Orders Pending TruckRuns													
	RunID TruckRun Description	Truck	ShipDate	Time	Run Status	#Orders	Max Wgt 🔉 🔺							
	1736	.UnAssigned	8-Jan-2014	00:00	New Run	0	0	Setup A New TruckRun						
	1738 West Run	24' Mack	8-May-2014	00:00	New Run	4	11000							
	1732 Local	24' Mack	6-Aug-2015	00:00	Billed	7	0							
	1729 East Run	24' Volvo	7-Aug-2015	00:00	Pulled	3	0	N R T IN IC						
	1722 North Run	24' Volvo	8-Aug-2015	00:00	Pulled	5	0	Modify TruckHun Info						
								Check Run <u>S</u> tock 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						
	<						>	5 TruckRuns						
Co	nnected to Server				STEP	7.0	Confir							

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.

	Pri	nt ×
Printer <u>N</u> ame: Type: Where:	Ganon iR C5185 PCL6 Canon iR C5185 PCL6	✓ Properties
Page Ran	ge It Page e numbers and/or page ranges by commas. For example, 1,3,5-12.	Copies Number of <u>c</u> opies: 1
		Print All pages in range

TruckRun1736:

Yes

Are you ready to print the Pull Summary for

<u>N</u>o

this Run, and mark the Orders as 'Pulled'?

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.

😻 IL	Warehouse	Manager *	STEP1	Supply (Cl	had Der	mo)	- 🗆 🗙							
<u>File</u> Search <u>R</u> eports S <u>a</u> vedQueries <u>H</u>	elp													
Shipping Receiving W/H Transfers Items	TaskList T	askList Mgr 🛛 C	ycle Co	unt Mgr										
BUSH Orders BackOrders All Pending Orde	<u>R</u> USH Orders <u>BackOrders</u> All <u>Pending Orders</u> <u>Pending TruckRuns</u>													
RunID TruckRun Description	Truck	ShipDate	Time	Run Status	#Orders	Max Wgt 🛛 🔺								
1736	.UnAssigned	8-Jan-2014	00:00	Pulled	0	0	Setup A New TruckRun							
▶ 1738 West Run	24' Mack	8-May-2014	00:00	Pulled	4	11000								
1732 Local	24' Mack	6-Aug-2015	00:00	Billed	7	0								
1729 East Run	24' Volvo	7-Aug-2015	00:00	Pulled	3	0	Madifu Tauah Dua lafa							
1722 North Run	24' Volvo	8-Aug-2015	00:00	Pulled	5	0	Moairy Truckhun Inro							
							Check Run <u>S</u> tock 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							
<						>	5 TruckRuns							
Connected to Server				STEP1 Softv	vare v7.3	524 CH	ICAGO CMS							

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.

🤴 IL	IL Warehouse Manager * STEP1 Supply (Chad Demo)													
File Search Reports SavedQue	ries <u>H</u> elp													
Shipping Receiving W/H Transfers	Items TaskList	TaskLi	ist Mar	Cycle Coun	t Mar									
DUCU Orders Development All Perce	ling Orders Devide	- Taualu												
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	Customer Urder Date Target Ship Ready Status Houte HunD Total Wgt Multical M													
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	Toggle ReadyToShip Flag						
Bradner Village HCC	9-Aug-2013		Y	BackOrder	AUROR4	0	36	Change Order Delivery Boute						
Linder Technical Services	10-Aug-2013		Y	New Order	UPS	0	0							
Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	/ SETEC	0	0	Assign Order to a TruckRun						
Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	SBEND	0	8	Remove Order from TruckBun						
St Maria Goretti	17-Aug-2013		Y	On Hold	Z GEOFF	0	2							
St Maria Goretti	17-Aug-2013 17-Au	ug-2013	Y	PT Printed	Z GEOFF	0	1000	Mark Order As Pulled						
Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	SERVICE	0	0	(Be)Print Picking Ticket						
St. Clair / Scottissue, Inc.	22-Aug-2013 24-Au	ug-2013	Y	PT Printed	.CPU	0	240							
A & J Carpet & Janitorial	23-Aug-2013		Y	New Order	SERVICE	0	1829	(Re)Print Delivery Ticket						
Tipton Lakes Athletic Club	23-Aug-2013 29-Au	ug-2013	Y	Pulled	SERVICE	1726	68	Modify Order Quantities						
Barth County Humane Society	24-Aug-2013		Y	Pulled	SERVICE	1726	89							
Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	UPS	0	116	Mark Order As Shipped						
Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	-98							
Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	42	Batch Print Picking Tickets						
Hamilton Co Building & Grounds	24-Aug-2013 24-Au	ug-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	AUROR4	0	46							
	-				1			×						
< 70 Orders														
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Sh	ipping Receiving W/H Transfers	Items Tas	skList TaskL	ist Mar	Cvcle Coun	t Mar Ì							
	BUSH Orders BackOrders All Pending Orders Pending TruckBurs												
E	USH Urders <u>B</u> ackUrders <u>Sincerio</u>		renaing <u>T</u> ruck	Runs		,							
	Customer	Order Date	Target Ship	Ready	Status	Route	RunID	Total Wgt 🔺	View Order				
	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	Toggle ReadyToShip Flag				
	Bradner Village HCC	9-Aug-2013		Y	BackOrder	AUROR4	0	36	Change Order Delivery Boute				
L	Linder Technical Services	10-Aug-2013		Y	New Order	UPS	0	0					
L	Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	/ SETEC	0	0	Assign Order to a TruckRun				
L	Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	SBEND	0	8	Remove Order from TruckRun				
L	St Maria Goretti	17-Aug-2013		Y	On Hold	Z GEOFF	0	2					
L	St Maria Goretti	17-Aug-2013	17-Aug-2013	Y	PT Printed	Z GEOFF	0	1000	Mark Order As Pulled				
	Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	SERVICE	0	0	(Be)Print Picking Ticket				
	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	(Re)Print Delivery Ticket				
	Tipton Lakes Athletic Club	23-Aug-2013	29-Aug-2013	Y	Pulled	SERVICE	1726	68	Modify Order Quantities				
	Barth County Humane Society	24-Aug-2013		Y	Pulled	SERVICE	1726	89					
	Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	UPS	0	116	Mark Order As Shipped				
►	Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	-98					
	Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	42	Batch Print Picking Tickets				
	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	AUROR4	0	46					
	· · · · · · · · · · · · · · · · · · ·												
<	X 70 Orders												
Cor	nnected to Server				S	FEP1 Soft	ware v7.3	524 CHI	CAGO CMS				

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.)

ÿ	١	View Pen	ding O	rder		-	□ ×
<u>F</u> ile							
Pending Order 112541-2		Order Stat	us: Back	Order	Type: IN	Submit Order F	Review Issue
Bill To Ship To Instructions Order Not	es <u>R</u> eviev	vissues					
Bradner Village HCC 505 N Bradner Avenue			Wa Delive	rrehouse: IL ry Route: AL	IRORA	Merch Total: Taxable Sales:	\$36.36 \$36.36
Marion IN 4695	52					6% Tax:	\$2.18
Carrier: PSS Truck FOB: Ship Point TruckRun:				Ready To S	ihip?Y	Freight Ppd Deposit: Total Due :	\$0.00 \$0.00 \$0.00 \$38.54
Description	Ordered	Ship	B/0	Price	Amount	Item Code	Type 🛛 🔨
Big Green Hair & Body Shampoo	4	4	0	9.09	\$36.36	SH101	<u> </u>
Gallon							D
<							~

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<u>F</u> ile <u>S</u> earch <u>R</u> eports S <u>a</u> vedQuer	ies <u>H</u> elp												
Shipping Beceiving W/H Transfers	Items Tas	skList Í TaskL	ist Mar	Cycle (Count Ma	n Ì							
RUSH Orders Rack Orders All Pendi	na Orders 🗋 🗖	landing Truck	ا تو است	-,		. 1						1	
		ending <u>T</u> ruck	nuns			. 1							
	Urder Date	Target Ship	Heady	Statu	us Ro		Runit) Total V		V	(iew Order		
DJ's Pool	27-Jul-2013		Y	WillC	al .C	CPU	0		2	T 1 5			
D J'S Pool	27-Jul-2013		Y U	Will U	all .L		0		0	I oggle F	feady I oship Flag		
Linder Technical Convince	9-Aug-2013		ĭ V	Naw O	rder AUF	HURA IDC	0		36	Change O	rder Delivery Rou	te	
Linder Technical Services	10-Aug-2013		- T	Reek()	rder / SE	JES Etec	0		0	Assign Or	der to a Truck Ru		
Community Hospital/Bitter	14.Aug-2013		Y	BackO	rder SBI	END	0		8	Assign of			
St Maria Goretti	17-Aug-2013		Ý	On Ho	old ZGE	ENEE	0		2 .	Remove O	rder from TruckR	un	
St Maria Goretti	17-Aug-2013	17-Aua-2013	Ý	PT Prin	nted ZGB	EOFF	0	1	000	Mark I	Drder As Pulled		
Advantage Floor Care Serv. Inc	21-Aug-2013		Ŷ	PT Prin	nted SEF	RVICE	0		0	(D -)D-:-	A Distance Tistance		
St. Clair / Scottissue, Inc.	22-Aug-2013	24-Aug-2013	Y	PT Prin	nted .C	:PU	0		240 -	(RejPrir	ICPICKING LICKET		
A & J Carpet & Janitorial	23-Aug-2013		Y	New O	rder SEF	RVICE	0	1	829	(Re)Prir	nt Delivery Ticket		
Tipton Lakes Athletic Club	23-Aug-2013	29-Aug-2013	Y	Pulle	ed SEF	RVICE	1726	i	68	Modif⊻	Order Quantities		
Barth County Humane Society	24-Aug-2013		Y	Pulle	ed SEF	RVICE	1726	i	89 -				
Squeaky Clean Professionals	24-Aug-2013		Y	PT Prin	nted U	JPS	0		116	Mark 0	rder As Shipped		
Diversified Cleaning	24-Aug-2013		Y	Pulle	ed SEF	RVICE	1726	i	-98				
Diversified Cleaning	24-Aug-2013		Y	Pulle	ed SEF	RVICE	1726	i	42	Batch Pri	nt Picking Ticket:	s	
Hamilton Co Building & Grounds	24-Aug-2013	24-Aug-2013	Y	New O	rder .C	CPU	0		12 1				
Bynum's Steakhouse	25-Aug-2013		Y	PT Prin	nted SEF	RVICE	0		105				
Grant Blackford Mental Health	25.Aug.2013		~	Back()	rder IALIE	ROR4	0		46				×
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<u>F</u> ile <u>S</u> earc	ch <u>R</u> eports	S <u>a</u> vedQue	eries <u>I</u>	<u>H</u> elp									
Connected to Server Shipping F	Receiving W	V/H Transfers	Items	Task	List Ta	askList	Mgr	Cycle Coun	t Mgr				
BUSH Ord	ers BackOrr	Hers All Pen	dina Ord	ers i Pe	endina Tu	uekBu	nel		- 1				
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	୬ ଗ		2750	12013			T V	WILCHI	CPU	0	2	Toggle ReaduTe	this Elsa
Bradner	Village HCC		9.Aug	.2013		-	÷ –	RackOrder		0	36	Tuggie neauyrus	onip riag
Linder T	echnical Serv	ices	10-Au	n-2013			Y I	New Order	LIPS	0	0	Change Order Deli	ery Route
	tu Memorial H	osnital	10-Au	n-2013		-	Ý I	BackOrder	/ SETEC	0	0	Assign Order to a	ruckBun
Commun	ity Hospital/R	litter	14-Au	o-2013		-	Ŷ	BackOrder	SBEND	0	8		TID
St Maria	Goretti		17-Au	g-2013		-	Y	On Hold	Z GEOFF	0	2	Hemove Urder from	TruckHun
St Maria	Goretti		17-Au	g-2013 1	17-Aug-20	013	Y	PT Printed	Z GEOFF	0	1000	Mark Order As	Pulled
Advanta	ge Floor Care	Serv. Inc	21-Au	g-2013	-		Y	PT Printed	SERVICE	0	0	(Be)Print Pickin	Ticket
St. Clair .	/ Scottissue, I	Inc.	22-Au	g-2013 2	24-Aug-20	013	Y	PT Printed	.CPU	0	240	(rieji nini Ficklini	HCKet
A & J Ca	rpet & Janitori	al	23-Au	g-2013			Y	New Order	SERVICE	0	1829	(Re)Print Deliver	/Ticket
Tipton L	akes Athletic	Club	23-Au	g-2013 2	29-Aug-20	013	Y	Pulled	SERVICE	1726	68	Modify Order Qu	antities
Barth Co	ounty Humane	Society	24-Aug	g-2013			Y	Pulled	SERVICE	1726	89	Hell O L C	himmed
Squeaky	y Clean Profes	sionals	24-Au	g-2013			Y	PT Printed	UPS	0	116	Mark Urder As S	nipped
▶ Diversifie	ed Cleaning		24-Au	g-2013			N	Pulled	SERVICE	1726	-98		
Diversifie	ed Cleaning		24-Au	g-2013			Y	Pulled	SERVICE	1726	42	Batch Print Pickin	g Tickets
Hamilton	Co Building 8	& Grounds	24-Au	g-2013 2	24-Aug-20	013	Y	New Order	.CPU	0	12		
Bynum's	Steakhouse		25-Au	g-2013			Y	PT Printed	SERVICE	0	105		
Grant Bla	ackford Menta	al Health	25-Au	g-2013			Y	BackÖrder	AUROR/	9 0	46		
<											>	70 Orders	
Connected	to Server							S	TEP1 Soft	tware v7.3	524 CHI	CAGO CMS	

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.

Support: 800-553-2602

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File Search Reports SavedQueries Help

WAREHOUSE SHIPPING

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	Shipping	Receiving W/H Transfers	Items Tas	skList 🛛 Taskl	list Mgr	Cycle Coun	t Mgr 🛛			
	<u>R</u> USH Or	ders BackOrders All Pend	ling Orders F	ending <u>T</u> ruck	Runs					
	Custor	er	Order Date	Target Ship	Ready	Status	Route	RunID	Total Wgt 🔺	
	DJ's Po	ool	27-Jul-2013		Y	Will Call	.CPU	0	2	
	D J's P	ool	27-Jul-2013		Y	Will Call	.CPU	0	0	Tog
I	Bradne	r Village HCC	9-Aua-2013		Y	BackOrder	AUROR4	0	36	

	Customer	Order Date	Target Ship	Ready	Status	Route	RunID	Total Wgt 🔺	View Order
	DJ's Pool	27-Jul-2013		Y	Will Call	.CPU	0	2	<u></u>
	D J's Pool	27-Jul-2013		Y	Will Call	.CPU	0	0	Toggle ReadyToShip Flag
	Bradner Village HCC	9-Aug-2013		Y	BackOrder	AUROR/	0	36	Change Order Delivery Route
	Linder Technical Services	10-Aug-2013		Y	New Order	UPS	0	0	Change order Derivery Houte
	Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	/ SETEC	0	0	Assign Order to a TruckRun
	Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	SBEND	0	8	Remove Order from TruckBun
	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	Mark Order As Pulled
	Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	SERVICE	0	0	(Be)Print Picking Ticket
	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	(Re)Print Delivery Ticket
	Tipton Lakes Athletic Club	23-Aug-2013	29-Aug-2013	Y	Pulled	SERVICE	1726	68	Modify Order Quantities
	Barth County Humane Society	24-Aug-2013		Y	Pulled	SERVICE	1726	89	
	Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	UPS	0	116	Mark Urder As Shipped
₽	Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	-98	
	Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	42	Batch Print Picking Tickets
	Hamilton Co Building & Grounds	24-Aug-2013	24-Aug-2013	Y	New Order	.CPU	0	12	'III
	Bynum's Steakhouse	25-Aug-2013		Y	PT Printed	SERVICE	0	105	
	Grant Blackford Mental Health	25-Aug-2013		Y	BackOrder	AUROR/	0	46	
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Со	nnected to Server				S	TEP1 Soft	ware v7.3	524 CH	ICAGO CMS

IL Warehouse Manager * STEP1 Supply (Chad Demo)

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)

💗 Select Delivery Route	_ 🗆 🔜	×
<u>O</u> ptions		
Delivery Route Description	RouteCode	^
Via Service Technician	SERVICE	
UPS Truck	UPS	
Rockford & Vacinity	ROCK	
Inside Sales Staff	Z STAFF	
Kokomo,Laffyet,Carmel,Westfie.	W SETECH	
Aurora & Vacinity	AURORA	
Local Chicao & Vacinity	LOCAL	
Customer Pick-up	.CPU	
Salesman	ZBOBS	
Salesman	Z GEOFF	
Salesman	Z MIKE	
Salesman	Z PAUL	
Salesman	Z ROB	
Salesman	ZBOB	
Salesman	ZJERRY	
Inside sales	ZANN	
Inside Sales Staff	Z CHRIS	
bottomline fast react	COURIER	

Ÿ	IL Warehouse Manager * STEP1 Supply (Chad Demo) - 🗆 🗙												
<u>F</u> il	e <u>S</u> earch <u>R</u> eports S <u>a</u> vedQue	ries <u>H</u> elp											
Sh	ipping Beceiving W/H Transfers	Items Tas	skList∫ TaskL	ist Mar	Cycle Coun	t Mar Ì							
		ina Ordare I n			-,				1				
E	USH Urders <u>B</u> ackUrders <u>Storend</u>		ending <u>F</u> ruck	Runs									
	Customer	Order Date	Target Ship	Ready	Status	Route	RunID	Total Wgt 🔺	View Order				
L	DJ's Pool	27-Jul-2013		Y	Will Call	.CPU	0	2					
L	D J's Pool	27-Jul-2013		Y	Will Call	.CPU	0	0	Toggle ReadyToShip Flag				
	Bradner Village HCC	9-Aug-2013		Y	BackOrder	AUROR4	0	36	Change Order Delivery Boute				
	Linder Technical Services	10-Aug-2013		Y	New Order	UPS	0	0					
	Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	/ SETEC	0	0	Assign Order to a TruckRun				
	Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	SBEND	0	8	Remove Order from TruckRun				
L	St Maria Goretti	17-Aug-2013		Y	On Hold	Z GEOFF	0	2					
L	St Maria Goretti	17-Aug-2013	17-Aug-2013	Y	PT Printed	Z GEOFF	0	1000	Mark Order As Pulled				
	Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	SERVICE	0	0	(Be)Print Picking Ticket				
	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	(Re)Print Delivery Ticket				
	Tipton Lakes Athletic Club	23-Aug-2013	29-Aug-2013	Y	Pulled	SERVICE	1726	68	Modify Order Quantities				
	Barth County Humane Society	24-Aug-2013		Y	Pulled	SERVICE	1726	89					
	Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	UPS	0	116	Mark Urder As Shipped				
Þ	Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	-98					
	Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	42	Batch Print Picking Tickets				
	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	AUROR4	0	46					
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1								>	70 Orders				
Cor	nnected to Server				S	TEP1 Soft	ware v7.3	524 CH	ICAGO CMS				

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.

	Pr	int ×
Printer <u>N</u> ame: Type: Where:	Sanon iR C5185 PCL6 Canon iR C5185 PCL6	<u>Properties</u>
Page Range	Page numbers and/or page ranges y commas. For example, 1,3,5-12.	Copies Number of <u>c</u> opies: 2
		P <u>r</u> int All pages in range 💽

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WAREHOUSE SHIPPING

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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.

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File Search Reports SavedQueries Help

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

*			Modify P	odify Pending Order Quantities								
<u>F</u> ile												
Pending	g Order 112541	-2					5	<u>5</u> ave (Cancel			
<u>B</u> ill To	<u>S</u> hip To <u>I</u> nstructi	ions Orde	er <u>N</u> otes									
Bradne	r Village HCC			Order Date: 9	-Aug-201	I3 Ship	oped:		•	-		
505 N I	D5 N Bradner Avenue arion IN 46952			Target Ship:		Р	P 0 # FAX/Shellu					
Marion		IN	46952	Salesman: G	JONAS	C	arrier: F	PSS Truck		-1		
□ Set (■ Rea ■ Rea	Order Status to 'Ba dy To Ship? dy To Bill?	ckOrderd'?	?	Status: B Order Source: R	ackOrde OSIE	en Fr	eight:		\$0.0	σ		
Line T	ItemCode	Descrip	tion		Ordered	Shipped	B/0	Price	Opt	~		
Line T	ItemCode SH101	Descrip Big Greer	tion n Hair & Bod	ly Shampoo	Ordered 4	Shipped 4	B/O	Price	Opt b3	Â		
Line T 1 I 2 D	ItemCode SH101	Descrip Big Greer Gallon	tion h Hair & Bod	ly Shampoo	Ordered 4	Shipped 4	B/O 0	Price 9.09	Opt b3	î		

<u>RUSH Orders</u> <u>BackOrders</u> <u>All Pend</u>	ing Orders P	ending <u>T</u> ruck	Runs					
Customer	Order Date	Target Ship	Ready	Status	Route	RunID	Total Wgt 🔺	View Order
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	Toggle ReadyToShip Flag
Bradner Village HCC	9-Aug-2013		Y	BackOrder	AUROR/	0	36	Change Order Delivery Boute
Linder Technical Services	10-Aug-2013		Y	New Order	UPS	0	0	Change order Delivery Hould
Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	/ SETEC	0	0	Assign Order to a TruckRun
Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	SBEND	0	8	Bemove Order from TruckBun
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	Mark Order As Pulled
Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	SERVICE	0	0	(Be)Print Picking Ticket
St. Clair / Scottissue, Inc.	22-Aug-2013	24-Aug-2013	Y	PT Printed	.CPU	0	240	(10) 1111 10111 101
A & J Carpet & Janitorial	23-Aug-2013		Y	New Order	SERVICE	0	1829	(Re)Print Delivery Ticket
Tipton Lakes Athletic Club	23-Aug-2013	29-Aug-2013	Y	Pulled	SERVICE	1726	68	Modify Order Quantities
Barth County Humane Society	24-Aug-2013		Y	Pulled	SERVICE	1726	89	
Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	UPS	0	116	Mark Urder As Shipped
Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	-98	
Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	42	Batch Print Picking Tickets
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	AUROR/	0	46	
							~	70.0.1
<							>	/U Urders
onnected to Server				S	TEP1 Soft	ware v7.3	524 CHI	CAGO CMS

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IL Warehouse Manager * STEP1 Supply (Chad Demo)

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.

🦻 File		Modify Pe	ending Order Q)uantitie	25			
- Pending Order	112541-2					<u>S</u>	ave	Cance
<u>B</u> ill To <u>S</u> hip To	Instructions Ord	ler <u>N</u> otes						
505 N Bradner Marion Set Order Sta Ready To S Ready To B	Avenue IN tus to 'BackOrderd Ship? Sill?	46952	Salesman: G Salesman: G Status: B Order Source: R	JONAS ackOrde OSIE	f F F	P.O.#: F/ Carrier: P Treight:	XX/Shelly SS Truck	\$0.0
Line T ItemCod 2 D	le Descrip Big Gree Gallon	otion m Hair & Body	y Shampoo	Ordered 4	Shipped 4	B/O	Price 9.09	Opt b3

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.

	L Wareho	use Mana	ager '	* STEP1	Supply	(Chad	l Demo)		- 🗆 🗙				
e <u>S</u> earch <u>R</u> eports S <u>a</u> vedQu	ieries <u>H</u> elp												
pping Receiving W/H Transfe	rs Items Tas	skList Taskl	.ist Mgr	Cycle Coun	t Mgr								
	ndina Orders 🛛 🖻	' endina Truck	Bunsl										
Customer Order Date Target Shin Beady Status Boute BunD TotalWat a													
	Drder Date	Target Ship	неаду	Status	CDU	RuniD		⊻iev	Order				
	27-Jul-2013		T U	Will Call	.CPU	0		Tarada Dara	LT - CHA TH -				
	27-Jul-2013		T U	Will Call	.LPU	0	0	l oggle Rea	iyi oship Flag				
Bradner Village HUU	9-Aug-2013		T U	Naw Order		0	36	Change Orde	Delivery Route				
Linder Technical Services	10-Aug-2013		T U	New Urder	UPS	0	0	Accient Ocdas	La la Tauali Duna				
Lipton Cty Memorial Hospital	10-Aug-2013		T U	BackUrder	COEND	0	0	Assign Urder	to a FruckHun				
Community Hospital/Ritter	14-Aug-2013		T U	BackUrder	SBEND	0	8	Remove Orde	from TruckRu				
St Maria Goretti	17-Aug-2013	17 Aug 2012	T U	DT Drived		0	2	Mark Orde	or As Dullad				
St Maria Goretti	17-Aug-2013	17-Aug-2013	Υ Ο	PT Printed		0	1000		ei As Fulleu				
Advantage Floor Care Serv. Inc	21-Aug-2013	04.4 004.0	T U	PT Printed	SERVICE	0	0	(Re)Print Pi	icking Ticket				
St. Llair / Scottissue, Inc.	22-Aug-2013	24-Aug-2013	Y U	PT Printed	UPU	0	240	(Be)Print D	eliveru Ticket				
A & J Larpet & Janitorial	23-Aug-2013	00 A 0010	Y U	New Urder	SERVICE	1700	1829						
Tipton Lakes Athletic Llub	23-Aug-2013	29-Aug-2013	Y U	Pulled	SERVICE	1726	68	Modify Ord	er <u>Q</u> uantities				
Barth Lounty Humane Society	24-Aug-2013		Y U	Pulled	SERVICE	1726	89	Mark Orde	r As Shipped				
Squeaky Clean Professionals	24-Aug-2013		Y U	PI Printed	UPS	1700	116						
Diversified Lleaning	24-Aug-2013		Y U	Pulled	SERVICE	1726	-98						
Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	42	Batch Print F	icking Tickets				
Hamilton Co Building & Grounds	24-Aug-2013	24-Aug-2013	Y	New Urder	.CPU	U	12						
Bynum's Steakhouse	25-Aug-2013		Y	PI Printed	SERVICE	U	105						
Grant Blackford Mental Health	25-Aug-2013		Y	BackUrder	AURURA	U	46						
							>	70 0	rders				

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.

💗 IL Warehouse Manager * STEP1 Supply (Chad Demo) - 🗆 🗙									
<u>F</u> ile <u>S</u> earch <u>R</u> eports S <u>a</u> vedQueries <u>H</u> elp									
Shipping Receiving W/H Transfers I Items TaskList TaskList Mar Cycle Count Mar									
HUSH Urders BackUrders Statending Olders Pending TruckRuns									
L	Customer	Order Date	Target Ship	Ready	Status	Route	RunID	Total Wgt \land	View Order
L	DJ's Pool	27-Jul-2013		Y	Will Call	.CPU	0	2	
L	D J's Pool	27-Jul-2013		Y	Will Call	.CPU	0	0	Toggle ReadyToShip Flag
	Bradner Village HCC	9-Aug-2013		Y	BackOrder	AUROR4	0	36	Change Order Delivery Boute
	Linder Technical Services	10-Aug-2013		Y	New Order	UPS	0	0	
L	Tipton Cty Memorial Hospital	10-Aug-2013		Y	BackOrder	/ SETEC	0	0	Assign Order to a TruckRun
L	Community Hospital/Ritter	14-Aug-2013		Y	BackOrder	SBEND	0	8	Remove Order from TruckRun
L	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	Mark Order As Pulled
	Advantage Floor Care Serv. Inc	21-Aug-2013		Y	PT Printed	SERVICE	0	0	(Be)Print Picking Ticket
	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	(Re)Print Delivery Ticket
	Tipton Lakes Athletic Club	23-Aug-2013	29-Aug-2013	Y	Pulled	SERVICE	1726	68	Modify Order Quantities
	Barth County Humane Society	24-Aug-2013		Y	Pulled	SERVICE	1726	89	
	Squeaky Clean Professionals	24-Aug-2013		Y	PT Printed	UPS	0	116	Mark Order As Shipped
Þ	Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	-98	
	Diversified Cleaning	24-Aug-2013		Y	Pulled	SERVICE	1726	42	Batch Print Picking Tickets
	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	AUROR4	0	46	
×									
> 70 Orders									
Connected to Server STEP1 Software v7.3524 CHICAGO CMS									

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)

Batch Print Picking ... Picking Ticket Print Option

- Print <u>R</u>USH Orders Only
- Print New Orders
- Print Orders to be Shipped <u>T</u>oday.
- Print Orders for a <u>D</u>elivery Route
- Print <u>BackOrders</u>
- Print All Pending Orders
- Print Orders for TruckRun 1726
- Do NOT Re-Print if previously Printed.

Cancel

Only Print if Order is 'Ready To Ship'

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

