



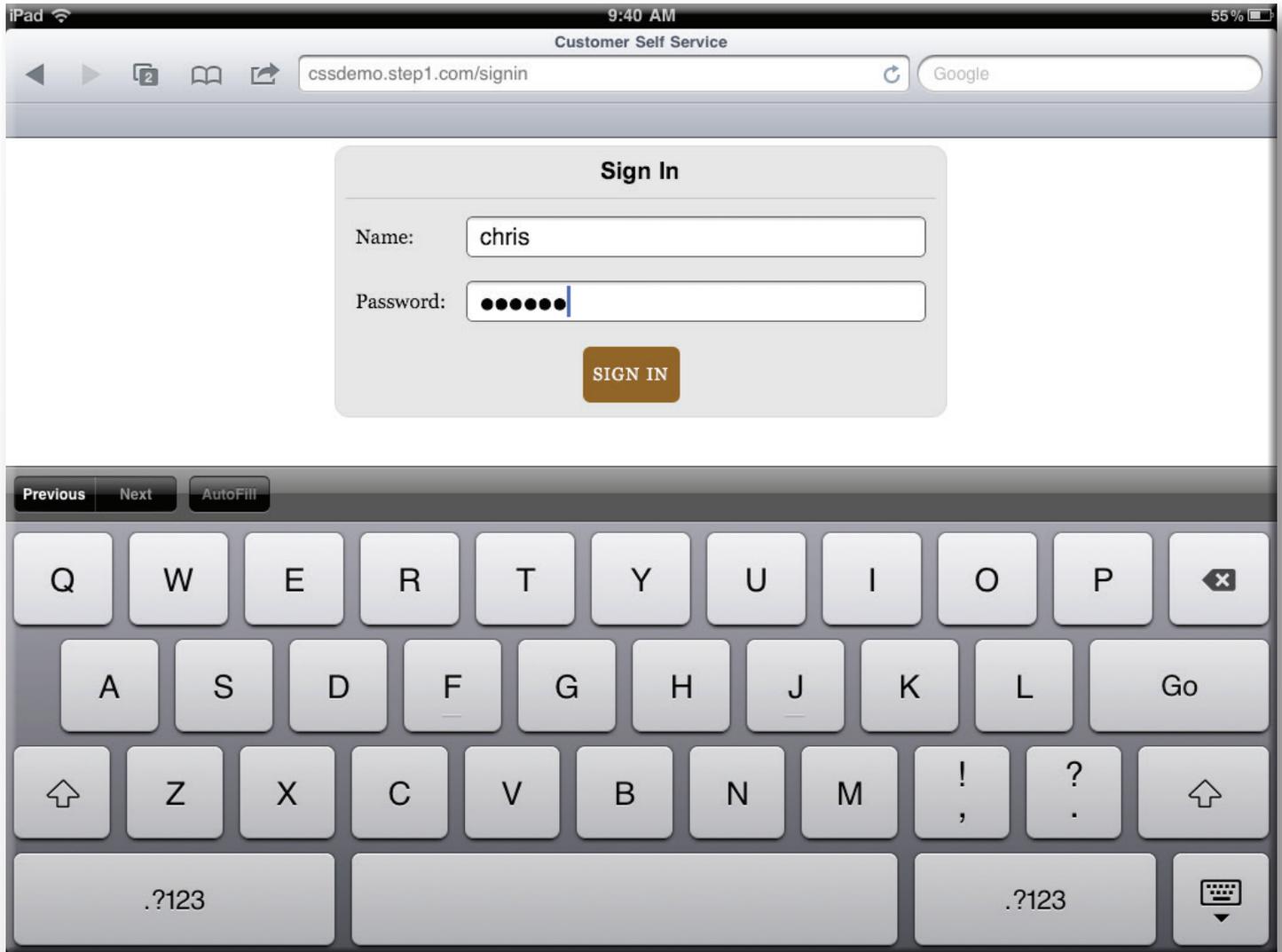
CUSTOMER SELF SERVICE TRAINING GUIDE

The main focus of this tool is to make it simple for you to place orders with our company, at any time of the day, when it is most convenient for you.

All screen shots in this guide are from the iPad version of the app but it works the same in a browser

Before we start, you should have been given the domain to which you need to browse, your username and your password to access your order entry system.

Once you have that info and have put it to use your screen should look like this...



If you are using a browser and not the iPad of course you won't see the keyboard on screen.

Click the Sign In button and here we go!

The Welcome Screen...

Before we actually create an order lets cover what is here.

STEP1 Supply Company (v7Demo)
Chicago Unified School District

[empty] Cart Harrison Bronze Account

Customer Products

Due To Buy

CMI Items

Catalog Items

Inventory Items

Items On Sale

Welcome

Creating Orders

To begin an order, select an 'Items' button to start adding items to your cart. To place your order, first review your cart (the 'Cart' option at the top of each page), and then Checkout to place your order with us. When done, you can sign out through the 'Account' option at the top of each page.

Items Buttons - adding items to an order

Customer Products - items that your company purchases from us.

Due to Buy - items marked as within 6 days of the next planned reorder date.

CMI Items - Customer Managed Inventory - items that you regularly purchase, stocked at your location.

Catalog Items - a subset of all the items we offer, selected based on our understanding of what you might need.

Inventory Items - the stock and non-stock items that we offer.

Items On Sale - just those inventory items that are currently on sale.

Questions? If you have any questions about this self-service application, or about your account, please contact us.

Customer Self Service

If you click on your account button in the top right you will see this drop down menu.

Pending Orders - shows you what orders you have entered into the system that have not yet been processed.

Open Invoices - shows any invoices that have yet to be paid.

Budget Info - shows your budget numbers with our company

Start Page - brings you back to the Welcome screen (shown above)

Help / More Info - brings you to short on screen instructional.

Sign Out - signs you out of the system and brings you back to the login screen.

[empty] Cart Harrison Bronze Account

- Pending Orders
- Open Invoices
- Invoice History
- Budget Info
- Start Page
- Help / More Info
- Select an Account
- Sign out

Just a look at the screens shown when using the Account drop down menu...

Account Budget Information

YTD Start Date:	01-Jan-2013
YTD Purchases:	\$15,305.74
YTD Budget:	\$24,076.71
YTD Over/Under:	(\$8,770.97)
Annual Budget:	\$26,000.00
Last Year's Annual Budget:	\$24,000.00

Customer Self Service

Open Invoices

Balance:	\$18,451.54	Current:	\$1,323.26	Past Due:	\$17,128.28
Pending Orders:	\$91,479.18	31-45 Days:	-	Last Payment:	18-Aug-2009
Pending Total:	\$109,930.72	46-60 Days:	\$13,723.60	Ave Pmt Days:	20
Credit Limit:	\$50,000.00	61-90 Days:	-		
Credit Hold:		90-120 Days:	-		
		120+ Days:	\$3,404.68		

Invoice #	Type	Customer PO	Invoice Date/ Due Date	Terms	Days Past Due	Invoice Amt	Amt Due
112412	IN	Dave Smith	07-Aug-2009 06-Sep-2009	Net 30	1,551	\$275.30	\$275.30
102822	IN		31-May-2011 30-Jun-2011	Net 30	889	\$2,832.50	\$2,832.50
113206	IN	bobtest1	17-Aug-2011 16-Sep-2011	Net 30	811	\$18.00	\$18.00
113207	IN	bobtest2	17-Aug-2011	Net 30	811	\$20.00	\$20.00
					214	\$258.88	\$258.88

displaying 16 of 16 open invoices

Pending Orders

Order Number	Order Date Target Ship	PO	Ship To	Merch Total	Lines	Status
113803	05-Dec-2013 11-Dec-2013		Chicago Unified School District Chicago, IL	\$221.45	3	CreditHold
113800	26-Nov-2013		Chicago Unified School District Chicago, IL	\$278.38	3	CreditHold
113799	22-Nov-2013		Chicago Unified School District Chicago, IL	\$261.87	2	CreditHold
113793	19-Nov-2013		Chicago Unified School D Chicago, IL			
113788	08-Nov-2013 08-Nov-2013		Chicago Unified School D Chicago, IL			
113786	07-Nov-2013		Chicago Unified School D Chicago, IL			
113784	05-Nov-2013		Chicago Unified School D Chicago, IL			

Customer Self Service

- Customer Products
- Due To Buy
- CMI Items
- Catalog Items
- Inventory Items
- Items On Sale

Help / More Info

Getting Started

We are providing this on-line tool to improve our service to your company.

Entering Orders

The main focus of this tool is to make it simple for you to place orders with our company, at any time of the day, when it is most convenient for you. After you sign in, you will add items to a cart, and then turn that cart into an order.

You add items to your cart by selecting one of the 'Items' buttons, and then filling in the online forms that appear. After adding items to your cart, you can review your cart by tapping the 'Cart' button at the top right edge of the page. When you are ready, you can place your order by selecting the option to 'Checkout' and 'Place Your Order'.

Your cart will remain available until you place your order or until it has been left inactive for more than seven days. You can start an order in the morning, and come back and finish it at a later time.

Account Information

In addition to reviewing products and placing orders, you can also review account information such as Pending Orders, Open Invoices, Invoice History, Proof-of-Delivery Tickets, and Account Budgets. This account information is accessible by tapping the 'Account' button in the top right corner of each page.

How to Contact Us

Customer Self Service

7.35.0.2

To create an order Start by choosing an Item Button on the left. (In this case all we have chosen Due to Buy) This is a list of Items that you already buy from us regularly and are going to run out of by the time you order again..

STEP1 Supply Company (v7Demo)
Chicago Unified School District

Search item #/desc Go [empty] Cart Harrison Bronce Account

Customer Products
Due To Buy
CMI Items
Catalog Items
Inventory Items
Items On Sale

Items Due To Buy

GREEN PRODUCTS

CHEM: Finish/Clnr/Seal/Strip	Price	Last/Next Date	Last Qty	Order Qty
551 Formula 55 Stripper 2 - 2.5gal Per Case	\$49.04 case	10-Sep-2013 22-Sep-2013	2 case	<input type="text"/>

EQUIPMENT

EQU: Vacuum Accessories	Price	Last/Next Date	Last Qty	Order Qty
100331 Micro Lined filter bag 10/pk	\$13.24 pack	17-Aug-2011 21-Aug-2011	1 pack	<input type="text"/>
611783 Viper/ Lite Trac paper bags 10/pack	\$15.22 pack	10-Sep-2013 20-Nov-2013	3 case	<input type="text"/>

TOOLS

TOOLS: Pads - Floor Pads	Price	Last/Next Date	Last Qty	Order Qty
17WHI 17" White Buff Pad		10-Sep-2013	5 case	<input type="text"/>

Customer Self Service displaying 46 of 46 items

To add an item to the cart simply click in the Order Quantity box and enter the quantity you would like to order. If you have more items to order just keep going. Enter quantities for all the items on this list that you need to order and then click the Add To Cart button on the bottom.

STEP1 Supply Company (v7Demo)
Chicago Unified School District

Search item #/desc Go [empty] Cart Harrison Bronce Account

Customer Products
Due To Buy
CMI Items
Catalog Items
Inventory Items
Items On Sale

Items Due To Buy

GREEN PRODUCTS

CHEM: Finish/Clnr/Seal/Strip	Price	Last/Next Date	Last Qty	Order Qty
551 Formula 55 Stripper 2 - 2.5gal Per Case	\$49.04 case	10-Sep-2013 22-Sep-2013	2 case	<input type="text" value="1"/>

EQUIPMENT

EQU: Vacuum Accessories	Price	Last/Next Date	Last Qty	Order Qty
100331 Micro Lined filter bag 10/pk	\$13.24 pack	17-Aug-2011 21-Aug-2011	1 pack	<input type="text"/>
611783 Viper/ Lite Trac paper bags 10/pack	\$15.22 pack	10-Sep-2013 20-Nov-2013	3 case	<input type="text"/>

TOOLS

TOOLS: Pads - Floor Pads	Price	Last/Next Date	Last Qty	Order Qty
17WHI 17" White Buff Pad		10-Sep-2013	5 case	<input type="text"/>

Customer Self Service displaying 46 of 46 items

You will be able to see the cart status change to show you how many items you have added and your total order dollar amount. At this point you can go to your cart and get ready for checkout or you can keep adding items to the order. For this example lets keep adding items. Let's say you need to order an item that you have never purchased from us before. To find it click the Inventory Items button on the left.

STEP1 Supply Company (v7Demo)
Chicago Unified School District

Search item #/desc Go [empty] Cart Harrison Bronze Account

Inventory Items -- All Categories -- -- All Sub-Categories --

Customer Products
Due To Buy
CMI Items
Catalog Items
Inventory Items
Items On Sale

GREEN PRODUCTS

CHEM: Aerosols	Price	Order Qty
 AMR-A00810 Dust Mop Treatment Can	\$4.28 can	<input type="text"/> can
CHEM: Carpet Care	Price	Order Qty
1120 Dry Foam Carpet Shampoo 4/1	\$45.10 case	<input type="text"/> case
1110 Extraction Concentrate 4/1	\$49.78 case	<input type="text"/> case
1150 HD Tannin Spotter QT	\$3.62 gal.	<input type="text"/> qt.
1100 Traff Lane Solvent Spotter GL	\$12.37 gal.	<input type="text"/> gal.
CHEM: Concentrate	Price	Order Qty
421 421 Husky Glass Cleaner	\$42.90 case	<input type="text"/> case

Customer Self Service displaying 1 - 50 of 57 items

This is a complete list of the items we stock. Which means its a long list so there are some features to help you narrow your search. The first one is the search bar on the top. Here you can enter a word like Scrubber and the list will be reduced to only those items with descriptions that include the word "scrubber"

STEP1 Supply Company (v7Demo)
Chicago Unified School District

scrubber X Go [empty] Cart Harrison Bronze Account

Inventory Items -- All Categories -- -- All Sub-Categories --

Customer Products
Due To Buy
CMI Items
Catalog Items
Inventory Items

EQUIPMENT

EQU: Auto Scrubber - Battery	Price	Order Qty
392808 EZ Rider HP 32" Disc Scrubber	\$13,199.99 each	<input type="text"/> each
608276 SpeedScrub Auto Scrubber	\$9,314.82 each	<input type="text"/> each

Next you can use the Category & Sub Category Filters. Click the drop down and choose what your looking for. Now what you are looking at is a list of only the items listed under the category you chose within the item set we chose in the beginning (Inventory Items).

A search filter dropdown menu for the term 'scrubber'. The menu is open, showing a list of categories: 'All Categories', 'GREEN PRODUCTS', 'PAPER & LINERS', 'EQUIPMENT', 'TOOLS', 'RECEPTACLES', and 'PARTS'. The 'PAPER & LINERS' category is highlighted. Below the menu, there are search results for 'scrubber' and 'scrub Auto Scrubber' with prices like \$199.99 and \$9,314.82. An 'Add To Cart' button is visible at the bottom.

The main product listing page for 'PAPER & LINERS'. The page header shows 'STEP1 Supply Company (v7Demo) Chicago Unified School District' and a search bar. The category 'PAPER & LINERS' is selected. The page displays a list of products with columns for 'PAPER: Universal Tissues', 'Price', and 'Order Qty'. Products include 'RESP-12620 1 Ply Jumbo Tissue 12/Case' at \$51.10, 'PBM5241 2 Ply Toilet Tissue 96/Case 500 sheets' at \$51.05, 'KIM01510 C-Fold Towel' at \$67.63, 'PLTFAC Facial Tissue' at \$23.80, 'PBMMFB Multifold Towel, White' at \$29.54, and 'PBM6026 Centerpull Towel, White' at \$37.84. An 'Add To Cart' button is highlighted for the 'PBM6026' item. The footer shows 'Customer Self Service' and 'displaying 9 of 9 items'.

If you need to filter the list even further you can choose a sub category from the second drop down menu. We can add any of these to the cart as well by entering a quantity and clicking the Add To Cart button. Changes to the cart will update as they did before, showing you new totals.

A sub-category filter dropdown menu. The menu is open, showing a list of sub-categories: 'All Sub-Categories', 'PAPER: Proprietary Systems', 'PAPER: Universal Tissues', 'PAPER: Universal Towels', 'PAPER: Wipers', 'PAPER: Feminine Products', 'PAPER: Food Service Items', 'PAPER: Miscellaneous', 'PAPER DISP: Towel/Tissue/Paper', 'PAPER DISP: Feminine & Misc', 'LINER: Hi-Density', 'LINER: Linear Low Density', 'LINER: Roll Liners', 'LINER: Infectious Waste', 'LINER: Miscellaneous', and 'PACKAGING: Boxes & Containers'. The 'PAPER DISP: Towel/Tissue/Paper' sub-category is highlighted. Below the menu, there are search results for 'scrubber' and 'scrub Auto Scrubber' with prices like \$23.80, \$29.54, and \$37.84. An 'Add To Cart' button is visible at the bottom.

The main product listing page for 'PAPER DISP: Towel/Tissue/Paper'. The page header shows 'STEP1 Supply Company (v7Demo) Chicago Unified School District' and a search bar. The category 'PAPER & LINERS' is selected, and the sub-category 'PAPER DISP: Towel/Tissue/Paper' is selected. The page displays a list of products with columns for 'PAPER DISP: Towel/ Tissue/ Paper', 'Price', and 'Order Qty'. Products include '25000 Jumbo Tissue Dispenser' at \$8.35 each and '4090W Metal C-Fold/Multifold Disp' at \$25.08 each. An 'Add To Cart' button is highlighted for the '4090W' item. The footer shows 'Customer Self Service' and 'displaying 2 of 2 items'.

The process to add items to the order is identical throughout most of the different Item sets on the left. The 1 that is different is CMI Items. CMI is Customer Managed Inventory. If you are using a program like this with us this is where you keep your stock levels where you need them.

When adding these items to the order instead of entering an order quantity you just enter the quantity you have on hand right now and it will figure out how many to order for you. Add to the Cart those items that you need and your done.

STEP1 Supply Company (v7Demo)
Chicago Unified School District

[empty] Cart ▶
Harrison Bronze Account ▼

Customer Products

Due To Buy

CMI Items

Catalog Items

Inventory Items

Items On Sale

Customer Managed Inventory (CMI) Items

GREEN PRODUCTS

CHEM: Finish/Clnr/Seal/Strip	Price	Last Date/Qty	CMI Par	On Hand	Order Qty	
550 Extreme Strip Cube 2.5 Gallon Cube	\$29.35 cube	10-Sep-2013 3 cube	3	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	cube

TOOLS

TOOLS: Mops - Floor Finish	Price	Last Date/Qty	CMI Par	On Hand	Order Qty	
MA001200 24/28oz Finish Mop Each	\$15.01 each	10-Sep-2013 1 each	12	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	each

TOOLS: Pads - Floor Pads	Price	Last Date/Qty	CMI Par	On Hand	Order Qty	
17WHI 17" White Buff Pad 5/Case	\$11.19 case	10-Sep-2013 5 case	2	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	case

Customer Self Service
displaying 3 of 3 items

Now that we have added a few items we can see them by clicking the Cart button on the top (just below the item total). Within the Shopping Cart there are a couple of things you can do. Click the edit button next to one of the items to enter the Edit Cart Line screen. First, you can update the quantity to order simply by changing the number in the Qty field and clicking the Update Qty button. Second, you can delete the item from the order completely by clicking the Delete Line Button.

STEP1 Supply Company (v7Demo) Chicago Unified School District cart expires 12-Dec-2013 Checkout ▸ Harrison Bronce Account ▾

Customer Products

Due To Buy

CMI Items

Catalog Items

Inventory Items

Items On Sale

Cart Summary

Item Code / Description	Price	Order Qty	Amount	
551 Formula 55 Stripper 2 - 2.5gal Per Case	\$49.04 case	2 case	\$98.08	edit
100331 Micro Lined filter bag 10/pk	\$13.24 pack	1 pack	\$13.24	edit
611783 Viper/ Lite Trac paper bags 10/pack	\$15.22 pack	3 case	\$45.66	edit
ITEM SUB-TOTAL:			\$156.98	

Checkout

this cart has 3 lines

STEP1 Supply Company (v7Demo) Chicago Unified School District \$157 (3) Cart ▸ Harrison Bronce Account ▾

Customer Products

Due To Buy

CMI Items

Catalog Items

Inventory Items

Items On Sale

Edit Cart Line

551
Formula 55 Stripper
2 - 2.5gal Per Case

Qty (case)	Price/case	
2	\$49.04	

UPDATE QTY

CANCEL

DELETE LINE

Customer Self Service

We've got the order the way we want it, all the items we need with the right quantities. Time to Checkout. Click the checkout button at the bottom of the Shopping Cart screen. Before you place your order you can enter a PO number and shipping instructions. You will also get one last opportunity to change the order.

NOTE: When entering PO Number or shipping instructions on the iPad If you Click the GO button you order will be submitted. If you just want to close the keyboard and keep working click this:

Customer Self Service

10:18 AM

Customer Self Service

cssdemo.step1.com/oe/checkout

Google

STEP1 Supply Company (v7Demo)

Chicago Unified School District

\$157 (3)

Cart

Harrison Bronce

Account

Cart Checkout

Order Header:

PO Number:

Shipping Instructions:

Ship-To: (Billing Address)
 Chicago Unified School District
 75 N Pratt Road
 Chicago, IL 63219

Place Order Now

Items Ordering: [edit lines](#)

Item Code / Description	Qty	Unit Price	Amount
551 Formula 55 Stripper 2 - 2.5gal Per Case	2 Case	\$49.04	\$98.08

Customer Self Service

this cart has 3 lines

Once you are satisfied that your order is ready you can click the Place Order Now button to submit the order to our system.

Once you have orders in our system you have access to all of your pending orders. This screen will show you not only what orders you have submitted but order total, status, and whether or not your items have shipped.

Order Number	Order Date Target Ship	PO	Ship To	Merch Total	Lines	Status
113343	23-Aug-2012		Chicago Unified School District Chicago, IL	\$45.12	1	New Order
113344	23-Aug-2012		Chicago Unified School District Chicago, IL	\$49.04	1	New Order
113342	22-Aug-2012		Chicago Unified School District Chicago, IL	\$117.40	1	New Order
113326	25-Apr-2012		Chicago Unified School District Chicago, IL	\$2,866.86	4	New Order
113307	17-Mar-2012		Chicago Unified School District Chicago, IL	\$306.35	2	New Order
113296	20-Feb-2012		Chicago Unified School District Chicago, IL	\$183.25	3	New Order
113288	27-Jan-2012		Chicago Unified School District Chicago, IL	\$2,527.84	3	New Order
113283	04-Jan-2012		Chicago Unified School District Chicago, IL	\$47.62	2	New Order

If you want to see more detail on a particular order just click it to view it.

Pending Order Detail for #113353 [back to order list](#)

Bill To: Chicago Unified School District
75 N Pratt Road
Chicago, IL 63219

Ship To: Chicago Unified School District
75 N Pratt Road
Chicago, IL 63219

Shipping Instructions:
Bring to back of building 3
Overhead doors

Order Date	Ship Date	PO	Merch Total	Status	Shipped	Rep
06-Sep-2012	-	123456-789	\$123.44	New Order	N	Wallace Semper

Item	Qty Ordered	Qty Shipped	Qty B/O	Unit Price	Amount
B100 Citrus Cleaner/Deodorizer	6	6	-	\$4.85	\$29.10
21oz Can 12/case					
YA010 Citrus Foaming Cleaner	12	12	-	\$4.10	\$49.20

In the open invoices screen you can see all of the invoices you have with our company that you have not yet paid along with balances, dates, etc...

iPad 9:07 AM 100% Customer Self Service

cssdemo.step1.com/account/invoices

STEP1 Supply Company (v7Demo) Chicago Unified School District [empty] Cart Arnie Anderson Account

Open Invoices

<i>Balance:</i>	\$3,145.80	<i>Current:</i>	-	<i>Past Due:</i>	\$3,145.80
<i>Pending Orders:</i>	\$49,540.05	<i>31-45 Days:</i>	-	<i>Last Payment:</i>	18-Aug-2009
<i>Pending Total:</i>	\$52,685.85	<i>46-60 Days:</i>	-	<i>Ave Pmt Days:</i>	20
<i>Credit Limit:</i>	\$50,000.00	<i>61-90 Days:</i>	-		
<i>Credit Hold:</i>	N	<i>90-120 Days:</i>	-		
		<i>120+ Days:</i>	\$3,145.80		

Invoice #	Type	Customer PO	Invoice Date/ Due Date	Terms	Days Past Due	Invoice Amt	Amt Due
112412	IN	Dave Smith	07-Aug-2009 06-Sep-2009	Net 30	1,096	\$275.30	\$275.30
102822	IN		31-May-2011 30-Jun-2011	Net 30	434	\$2,832.50	\$2,832.50
113206	IN	bobtest1	17-Aug-2011 16-Sep-2011	Net 30	356	\$18.00	\$18.00
113207	IN	bobtest2	17-Aug-2011 16-Sep-2011	Net 30	356	\$20.00	\$20.00

Customer Self Service displaying 4 of 4 open invoices