

# MCNi Training: Templates

## Overview

Templates are used to hold a list of items that a certain customer or group of customers would purchase from you. The templates are currently managed via the website mcni360.com but will soon be managed with the iPad/iPhone app as well.

## Creating a Template

Login to MCNi360.com and navigate to:

**Maintenance->List->Template->Maintain**

The screenshot shows the MCNi360.com dashboard. The left sidebar contains a navigation menu with the following items: Chemicals R Us (selected), Daily Processing, Maintenance, List, Apps & e-Commerce, Company, Device, Division, Haz Codes, Hot Key, Location, Manage, National Accounts, Rep, Rewards, Route Schedule, Spiff, Template, Assign, Maintain (highlighted in blue), Trucks, Service, Settings, and Reports. The main content area is titled 'Template List' and displays a table with the following data:

Template Name	Description	Customer Name	
Bakery	Bakery Customers	Molly's Pies	Edit
Materials	Materials Shop	Red's Restorations	Edit
PROD-01	PROD-01	Athens Ford	Edit

At the bottom of the table, there are buttons for 'New', 'Print', and 'Cancel'. The footer of the dashboard includes links for Company, Features, Resources, and a 'Chat with us' button.

To modify an existing template, press **EDIT** on the row. To create a new template, click **NEW**.

**Manage Template**

**Customer Name**  
Athens Ford

**Template**  
PRO01

**Description**  
PRO-01

**Distributor Credit**  
100

**Billing Item**  
Billing Item

**Order Prefix**  
I

**Order Type**  
I

**Mailing List**  
Select an Email

☐ Prevent Quantity Change

☐ National Account

☐ Require Proof of Delivery

☐ Order In Case

☐ "Ask for Pricing" for items not contracted

Item No.	Description	Quantity	Price	Taxed	Featured Prod
10120	WANKER #12a	0	25.00	<input type="checkbox"/>	<input type="checkbox"/>
51-00004	Vac Motor 3 Stage 120V	1	197.64	<input type="checkbox"/>	<input type="checkbox"/>
109232	Epic Finishing Polish 32oz	0	33.00	<input type="checkbox"/>	<input type="checkbox"/>
10772	BIG BRASS RING	0	12.25	<input type="checkbox"/>	<input type="checkbox"/>
109032	Epic Heavy Duty Compound 32oz	0	36.00	<input type="checkbox"/>	<input type="checkbox"/>
109132	Epic Medium Duty Compound 32oz	0	33.00	<input type="checkbox"/>	<input type="checkbox"/>
109232	Epic Finishing Polish 32oz	0	33.00	<input type="checkbox"/>	<input type="checkbox"/>
113901	S.A.P. Surface and Paint Clarifier 1 gal	0	44.00	<input type="checkbox"/>	<input type="checkbox"/>
113420	Water Spot Remover - 20 oz	0	20.00	<input type="checkbox"/>	<input type="checkbox"/>

**Customer Name** – select a customer that would be a candidate to use the template you are building. This is just an anchor for the template.

**Template** – name the template so you will recognize it when searching.

**Description** – Use this for any added information.

**Distributor Credit** – this is not use with the mobile app, but must have a value. Make it 100.

**Billing Item** - not used (use for national account processing).

**Order Prefix** – not used but required, so make it I for Invoice.

**Order Type** – not used but required, make it Invoice.

**Mailing List** – not used

**Checkmarks** – leave all unchecked. These are used in our B2C e-Commerce system.

Add items to the template.

Use the + button at the bottom-left corner of the grid. Search for the item you want and save it.

The screenshot shows the MCNi360 Dashboard with a form for adding items to a template. The form includes fields for Customer Name, Description, Billing Item, Order Type, Template, Distributor Credit, Order Prefix, and Mailing List. A modal window titled "Add Record" is open, showing fields for Item No., Description, Quantity, Price, Taxed, Featured Prod, and Partner Item. A table of items is visible in the background.

Item No.	Description	Quantity	Price	Taxed	Featured Prod
		0	25.00	<input type="checkbox"/>	<input type="checkbox"/>
	120V	1	197.64	<input type="checkbox"/>	<input type="checkbox"/>
	32oz	0	33.00	<input type="checkbox"/>	<input type="checkbox"/>
	G	0	12.25	<input type="checkbox"/>	<input type="checkbox"/>
	Compound 32oz	0	36.00	<input type="checkbox"/>	<input type="checkbox"/>
	Compound 32oz	0	33.00	<input type="checkbox"/>	<input type="checkbox"/>
	32oz	0	33.00	<input type="checkbox"/>	<input type="checkbox"/>
	nd Paint Clarifier 1 gal	0	44.00	<input type="checkbox"/>	<input type="checkbox"/>
	over - 20 oz	0	20.00	<input type="checkbox"/>	<input type="checkbox"/>

**Item No** – the item number will show here when you select an item.

**Description** – the description of the item you selected (auto-populated)

**Quantity** – this defaults to zero so that the user can just populate how many the customer wants. If you put a quantity in this field, that quantity will show on the invoice. This is commonly used for a surcharge, demurrage or trip/fuel charge.

**Price** – This is the price the item will be sold for, but if you have a switch set on the device, it will use the contracted price for the item instead of the price in the template. We will address the switch in this document.

**Taxed** – if the item is taxed or not.

**Featured Product** – this is used for the e-Commerce app

**Partner Item** – this is used for EDI translations

If you have the **Function Control** setting under **Pricing** named **Use Contract Price for Template**, then you can manage all of your pricing in

### Daily Processing -> Pricing -> Price Management

Dashboard - MCNi

mcni360.com/DashBoard/DashBoard#

Customer Center Reminders Dashboard Change Password Support Hello, John@chemicalsrus.com Log off

Price Management A L M Mall Of GA 88.1%

Search: Customer Item New Price Contract Push To Devices Delete Selected Export PDF Export Excel

Customer No: ALMMOGA Replicate To: A M S Vans INC Replicate

Adjust Price By: 0 Price Adjust All

Item Number	Item Description	List Price	Contract	Profit %	Minimum\$	Spiff1\$	Spiff2\$	Spiff3\$	Comm1%	Comm2%		
9-BF150H50	Rupes Blue Coarse Foam Pol...	12.99	16.00	60.1%	0.0	1.00	1.00	0.00	0.0	0.0	Save	Delete
9-BF190H50	Rupes Blue Coarse Foam Pol...	13.99	15.00	61.0%	0.0	0.00	0.00	0.00	0.0	0.0	Save	Delete
9-BFZEPHIR1C	Rupes Coarse Compound Ge...	46.40	48.00	39.1%	0.0	0.00	0.00	0.00	0.0	0.0	Save	Delete
9-GDLPF103M	Latex Power Free Gloves 8ML	15.00	14.50	45.6%	0.0	0.00	0.00	0.00	0.0	0.0	Save	Delete
9-GL-N105FM	Black Nitrile Gloves - Medium	12.50	11.25	43.5%	0.0	0.00	0.00	0.00	0.0	0.0	Save	Delete
AM-501201	AutoMagic PC-1 Extra Cut 32o...	40.00	40.00	52.8%	0.0	0.00	0.00	0.00	0.0	0.0	Save	Delete
AS-426-8	Mango Tango Air Freshener Cc...	16.90	0.00	0.0%	0.0	0.00	0.00	0.00	0.0	0.0	Save	Delete

Price Management is addressed in a separate video

**\* NOTE: If you make changes to the templates, or pricing in Price Management, you will need to do a SYNC on mcni360.com to make the changes available to the mobile devices.**

Now that we have the template created and the pricing established for the customer in question, we need to **assign** the customer to this template. Go to:

**Maintenance -> List -> Template -> Assign**

The screenshot shows the MCNi360 dashboard interface. The left sidebar contains a navigation menu with the following items: Chemicals R Us, Daily Processing, Maintenance, List, Apps & e-Commerce, Company, Device, Division, Haz Codes, Hot Key, Location, Manage, National Accounts, Rep, Rewards, Route Schedule, Spiff, Template, Assign, Maintain, Trucks, Service, Settings, and Reports. The main area is titled 'Assign Template'. It features two dropdown menus: 'Customer' and 'Template'. The 'Customer' dropdown is open, showing a list of customers including 'Advanced Automotive Detail'. The 'Template' dropdown is also open, showing a list of templates including 'Bakery'. An 'Assign' button is located to the right of the dropdowns. Below the dropdowns, there is a table with columns 'Template Name' and 'Template Customer'. The table contains several rows of data, including 'Bakery' and 'BOCAR'. At the bottom of the page, there is a 'Cancel' button and a 'Chat with us' button.

Select the customer you want to assign.

Select the template you want the customer to use

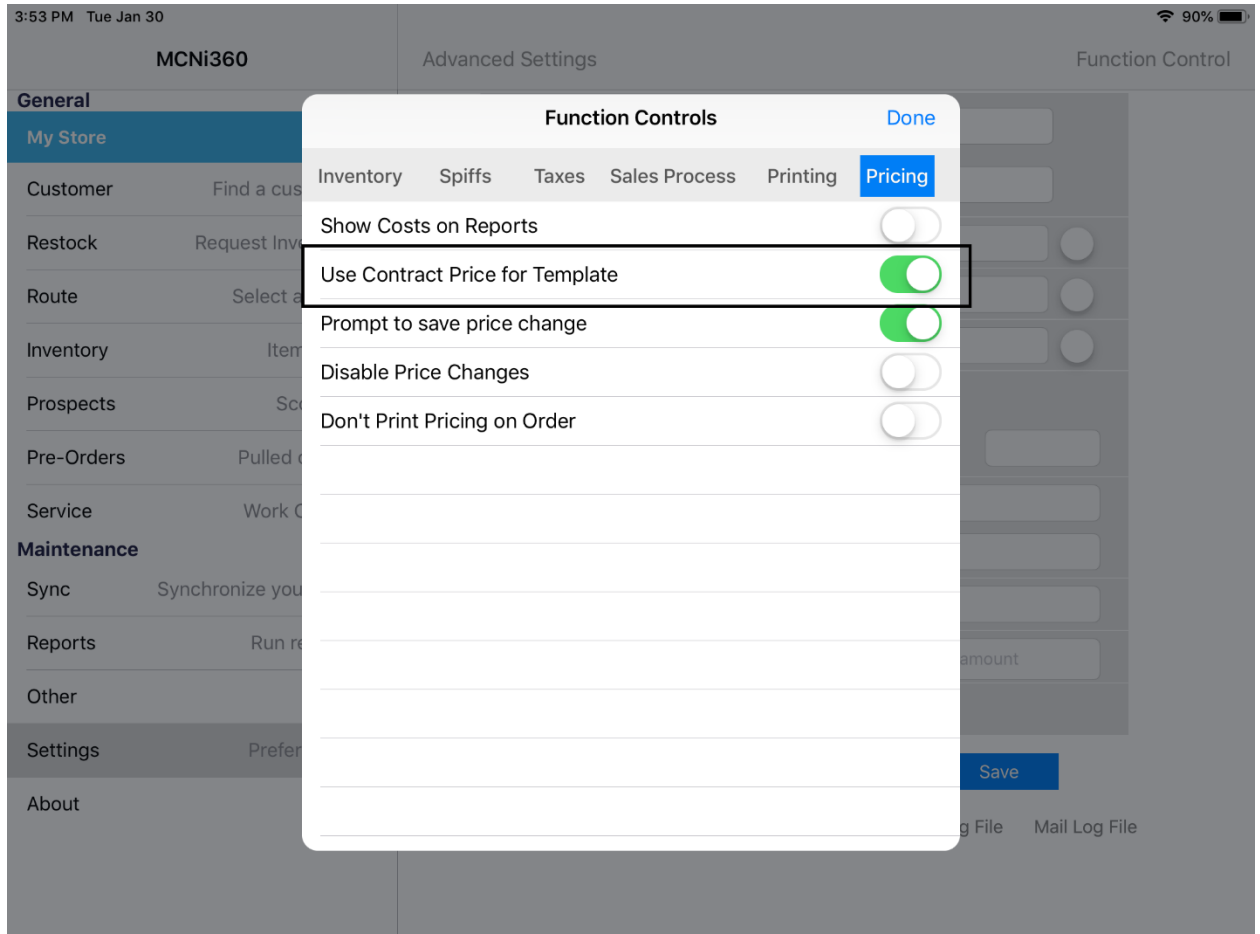
Click **ASSIGN**

## Turn On Use Contract Pricing

On the iPad or iPhone, click

**Settings->Function Control->Pricing**

Turn on **Use Contract Price for Template**



Click **DONE** and then **SAVE**.

To load the template, select your customer and click **Invoice**. Then, click

### Template/PreOrd

4:00 PM Tue Jan 30

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**A L M Mall Of GA**  
  
4228 Buford Rd  
  
Buford, GA 30518  
  
678-765-3800  
  
Cust No: ALMMOGA  
Terms: Net 15  
Price Level:  
Contact: test3  
Route: DETAIL  
  
Next Visit: 10/17/2023

INVOICE HISTORY

NOTES

LOCKED PRICING

CONTACTS & EVENTS

TOOLS

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Chemicals R Us

**Bill-To**  
A L M Mall Of GA  
4228 Buford Rd  
Buford, GA 30518

**Ship-To**  
A L M Mall of GA  
4228 Buford Drive  
Buford, GA 30518

Enter PO...

Comment...

Show\$ ☒

Bluetooth scan

Add Item

Item Code	Description	Qty	Price	Total	Tax	
100401	Baking Flour - 50lb	0	22.90	0.00	N	
100101	Leather and Plastic Cleaner - 1 Gal	0	24.00	0.00	N	
110601	Glaze II - 1 Gal	0	56.00	0.00	N	
127801	Oxy Carpet Upholstery Cleaner 1 gal	0	33.00	0.00	N	
117655	Outrageous Orange - 55 Gal	0	688.00	0.00	N	
9.BF150H50	Rupes Blue Coarse Foam Polishing Pad 13...	0	16.00	0.00	N	

CASH0.00

CHECK0.00

CARD(S)0.00

ACCT.0.00

PAYPAL/VENMO0.00

CASH APP0.00

CHECK#

SUB TOTAL0.00

DISCOUNT0.00

TAXES0.00

GRAND TOTAL0.00

Preview Invoice

Payment

Signature

Template/PreOrd

Hold

Finish & Save

Delete Order

Zero For CPC

The items in the template will automatically load.

Touch the item your customer wants to buy and enter the quantity.