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

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

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.

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

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:

Maintenange -> List -> Template -> Assign

Select the customer you want to assign.

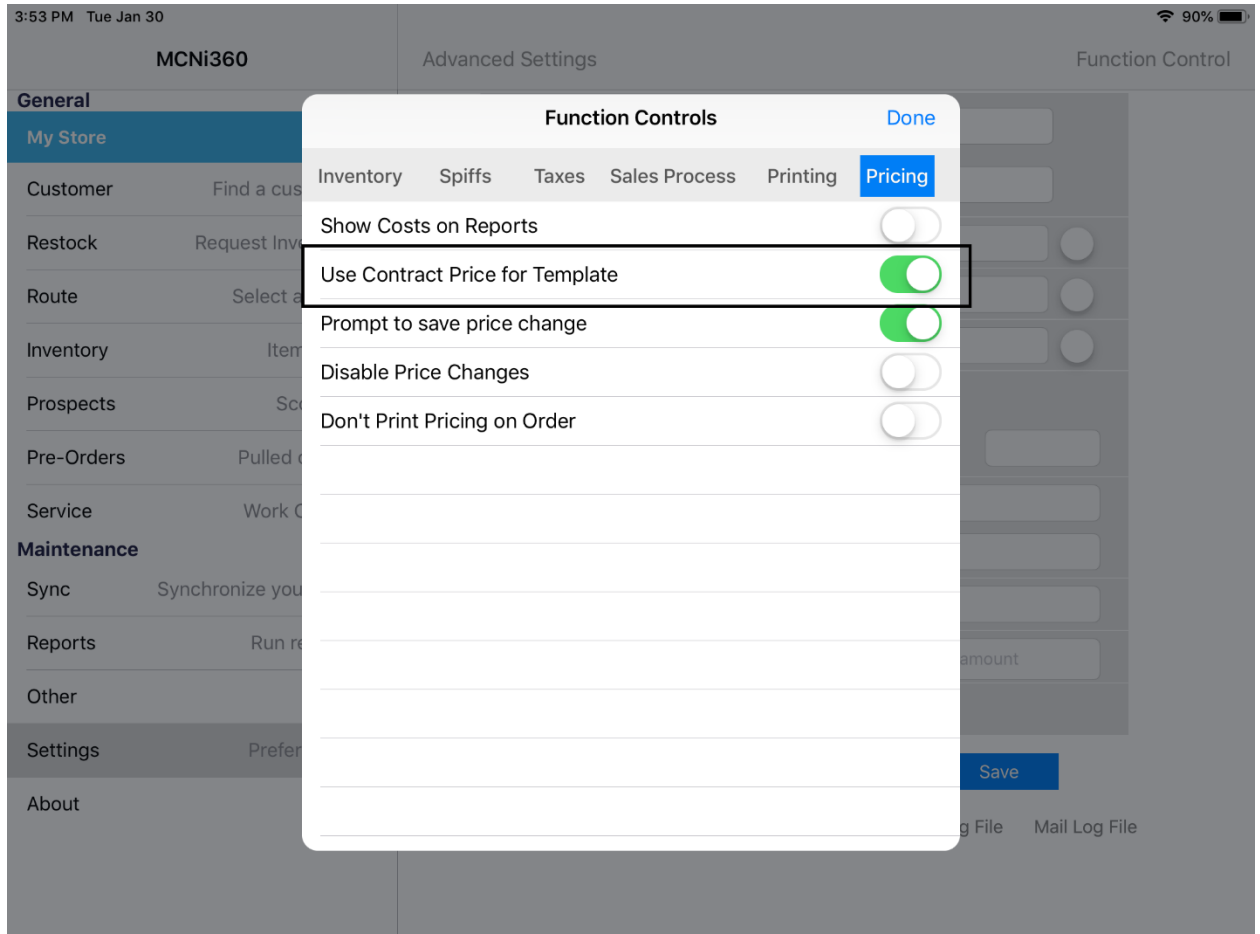Select the template you want the customer to use

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

The items in the template will automatically load.

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