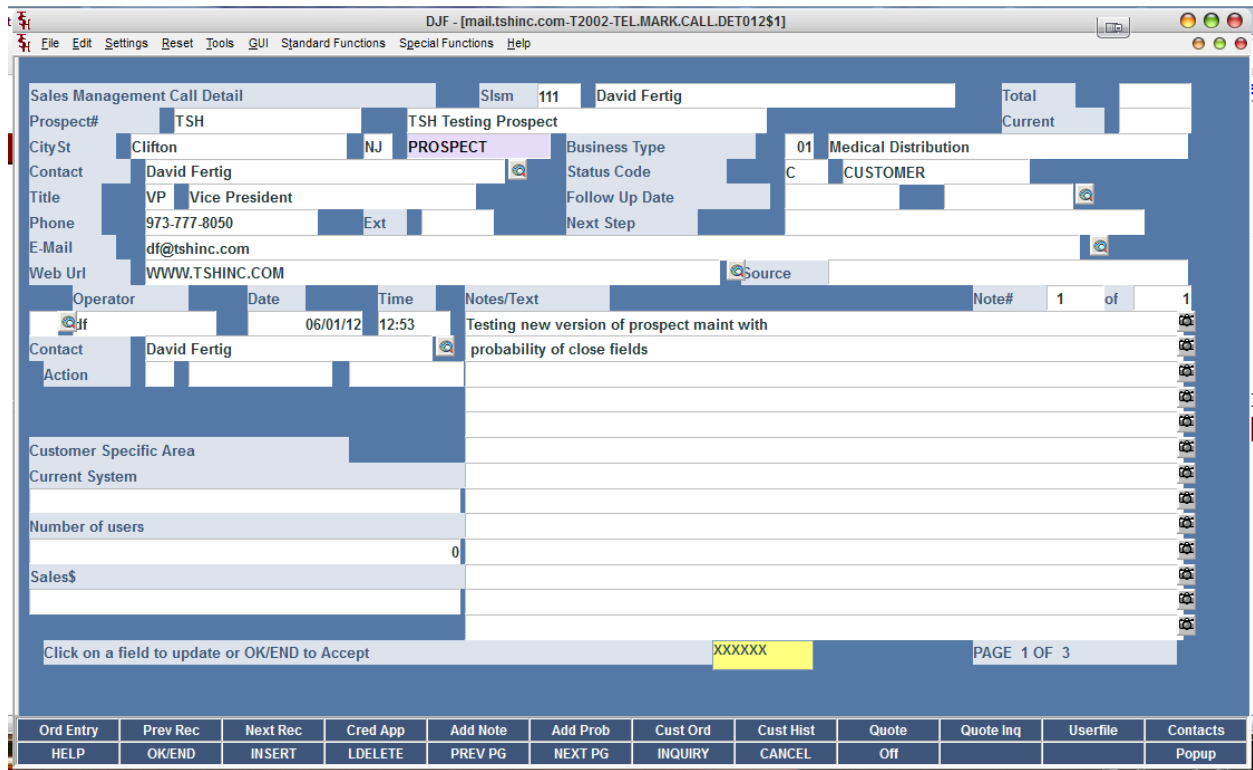


TSH Sales Prospecting System

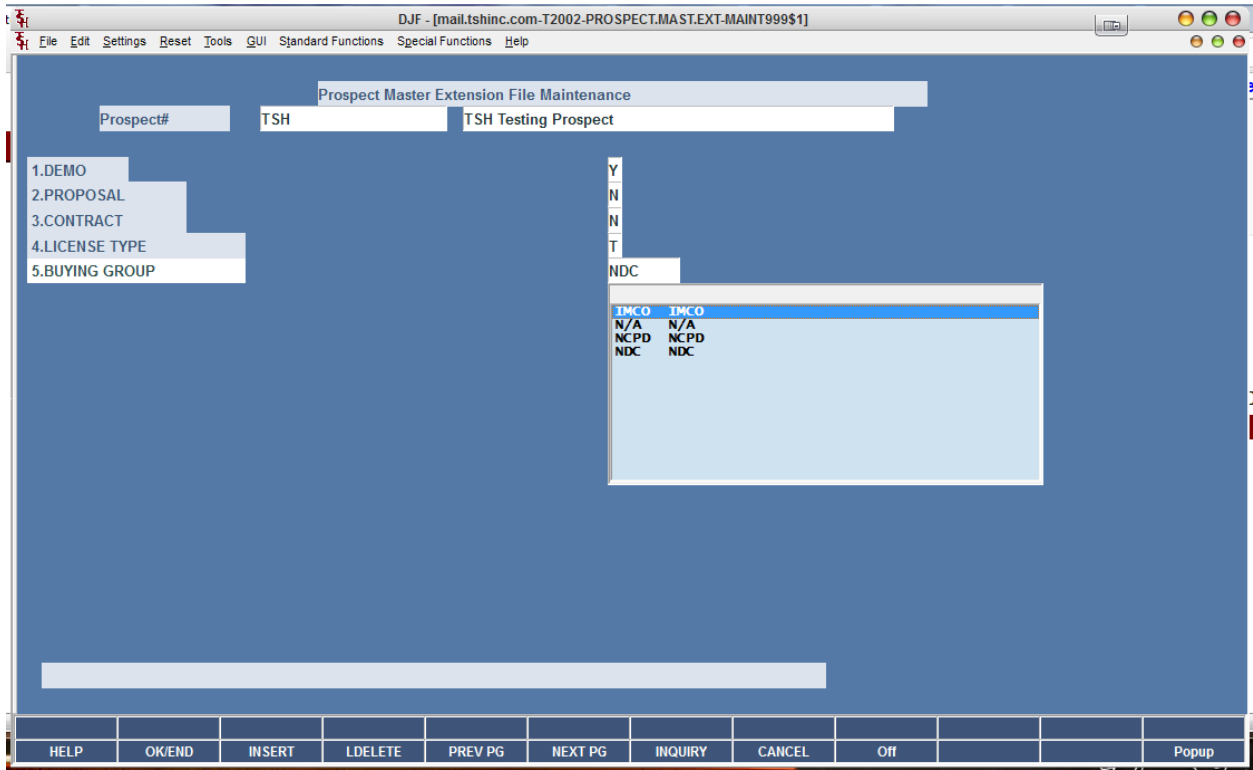
Updated 6/4/12 djf

Overview: We have added a report to help us gauge the probability of a deal closing within a specific timeframe – each time you update a prospect a history is kept so we can see the last time the projections were updated – by default the report will show the last two updates.

Step 1. Updating your custom fields for a prospect. Go to Prospect Call Maintenance on your menu.



Click on User file button (shift f11)_



Update each field for your prospect – note new fields may be added using the Standard MDS xtension file maintenances.

Step 2 . Update your probability of close information

DJF - [mail.tshinc.com-T2002-TEL.MARK.CALL.DET012\$1]

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Sales Management Call Detail Sism 111 David Fertig Total

Prospect# TSH TSH Testing Prospect Current

City St Clifton NJ PROSPECT Business Type 01 Medical Distribution

Contact David Fertig Status Code C CUSTOMER

Title VP Vice President Follow Up Date

Phone 973-777-8050 Ext Next Step

E-Mail df@tshinc.com

Web Url WWW.TSHINC.COM Source

Operator Date 06/01/12 Time 12:53 Notes/Text Note# 1 of 1

Testing new version of prospect maint with probability of close fields

Contact David Fertig

Action

Customer Specific Area

Current System

Current System Here

Number of users 101

Sales\$ 2000000

Click on a field to update or OK/END to Accept XXXXXX PAGE 1 OF 3

| | | | | | | | | | | | |
|-----------|----------|----------|----------|----------|----------|----------|-----------|-------|-----------|----------|----------|
| Ord Entry | Prev Rec | Next Rec | Cred App | Add Note | Add Prob | Cust Ord | Cust Hist | Quote | Quote Inq | Userfile | Contacts |
| HELP | OK/END | INSERT | LDELETE | PREV PG | NEXT PG | INQUIRY | CANCEL | Off | | | Popup |

Click on the Add Prob button – shift F6

DJF - [mail.tshinc.com-T2002-TEL.MARK.CALL.DET012\$3]

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Sales Management Prospect Call Detail

Prospect# TSH PROSPECT Create Date 01/21/10

Name TSH Testing Prospect

Address1 1033 rt 46 east

Address2

Address3

City/State Clifton NJ 07013 Country USA UNITED STATES

Contact David Fertig

Title VP Vice President

Phone 973-777-8050 Ext

Fax

Business 01 Medical Distribution

Sism 111 David Fertig

Status Code C CUSTOMER

Number of Users 101

Number of Employees

Close Date

Probability of Close

Proposal Date

Comments Used for testing emails

SIC Code

E-Mail df@tshinc.com

Web Url WWW.TSHINC.COM

| Prob# | Close/Deal | Close/Deal Month | Prop Month | Upd Date | Upd Time | # of Prob |
|-------|------------|------------------|------------|----------|------------|-----------|
| 1 | NNN | | | | | 3 |
| 2 | 40 | 65 | Apr | 06/01/12 | 12:55:07pm | |
| 3 | 55 | 70 | Mar | 06/01/12 | 12:55:05pm | |

| | | | | | | | | | | | |
|-----------|----------|----------|----------|----------|----------|----------|-----------|-------|-----------|----------|----------|
| Ord Entry | Prev Rec | Next Rec | Cred App | Add Note | Add Prob | Cust Ord | Cust Hist | Quote | Quote Inq | Userfile | Contacts |
| HELP | OK/END | INSERT | LDELETE | PREV PG | NEXT PG | INQUIRY | CANCEL | Off | | | Popup |

Enter your Fields – this will show you:

- A. Probability you will close the overall deal (0-100) percentage
- B. Probability that the Month your are entering is Real (0-100 percentage)
- C. The Month for these percentages
- D. Update Date (read only)
- E. Update Time (read only)

As you enter a new entry the old one will be pushed down – you should not be updating you should be adding – this will allow us to track the percentages and months over time.

The # of prob fields will show the total number of updates.

The screenshot shows a CRM application window titled "Sales Management Prospect Call Detail". The main form contains the following fields:

- Prospect#: TSH
- Name: TSH Testing Prospect
- Address1: 1033 rt 46 east
- City/State: Clifton NJ 07013
- Contact: David Fertig
- Title: VP Vice President
- Phone: 973-777-8050
- Business: 01 Medical Distribution
- Sism: 111 David Fertig
- Status Code: C CUSTOMER
- Comments: Used for testing emails
- E-Mail: df@tshinc.com
- Web Url: WWW.TSHINC.COM

Summary statistics on the right:

- Create Date: 01/21/10
- Country: USA UNITED STATES
- Number of Users: 101
- Number of Employees: [blank]
- Close Date: [blank]
- Probability of Close: [blank]
- Proposal Date: [blank]

A table at the bottom shows the history of updates:

| Prob# | Close/Deal | Close/Deal Month | Prop Month | Upd Date | Upd Time | # of Prob |
|-------|------------|------------------|------------|----------|------------|-----------|
| 1 | 90 | 80 | Mar | 06/04/12 | 07:36:03pm | 3 |
| 2 | 40 | 65 | Apr | 06/04/12 | 07:35:59pm | |
| 3 | 55 | 70 | Mar | 06/01/12 | 12:55:05pm | |

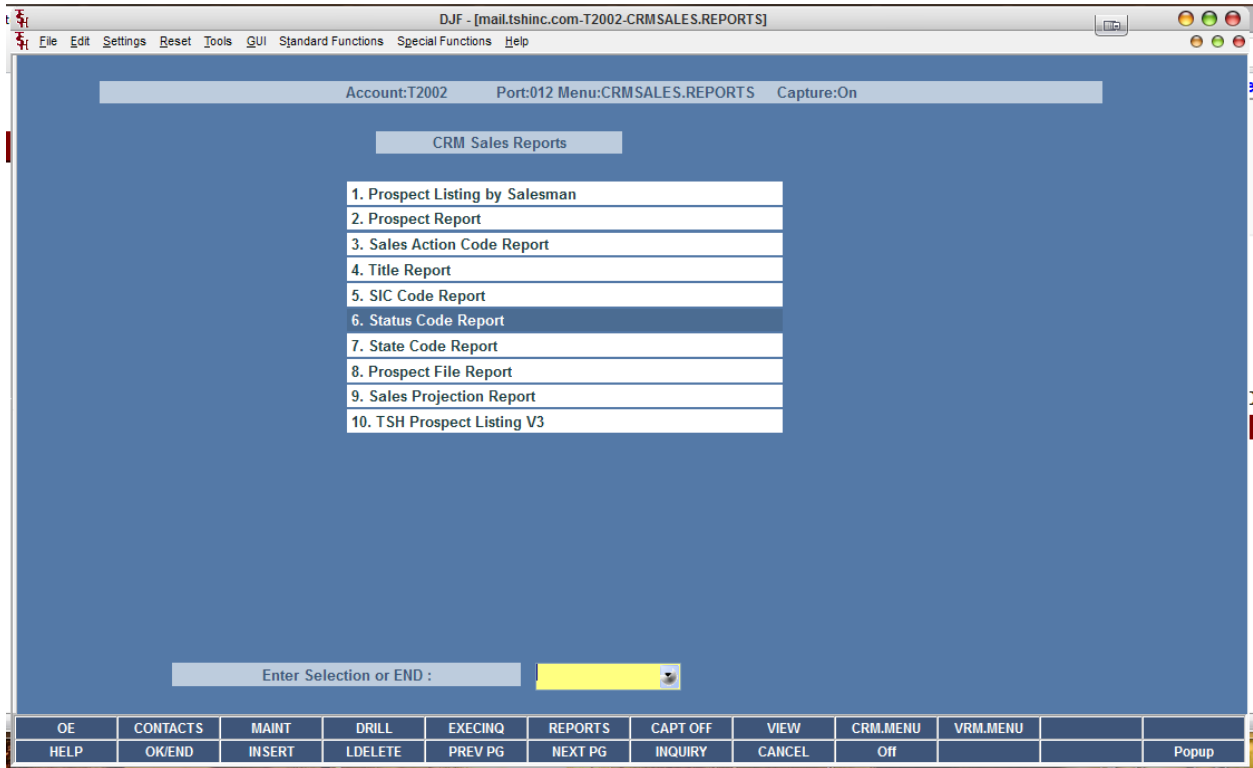
Below the table is a prompt: "ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT" with a yellow "XXXXXX" input field. The page number "PAGE 3 OF 3" is visible in the bottom right.

At the bottom of the window is a navigation bar with the following buttons:

| | | | | | | | | | | | |
|-----------|----------|----------|----------|----------|----------|----------|-----------|-------|-----------|----------|----------|
| Ord Entry | Prev Rec | Next Rec | Cred App | Add Note | Add Prob | Cust Ord | Cust Hist | Quote | Quote Inq | Userfile | Contacts |
| HELP | OK/END | INSERT | LDELETE | PREV PG | NEXT PG | INQUIRY | CANCEL | Off | | | Popup |

Once updated – click ok/end – or f2 to accept and save your changes..

To then view your information and or run sales reports – got to the CRM Reporting Menu



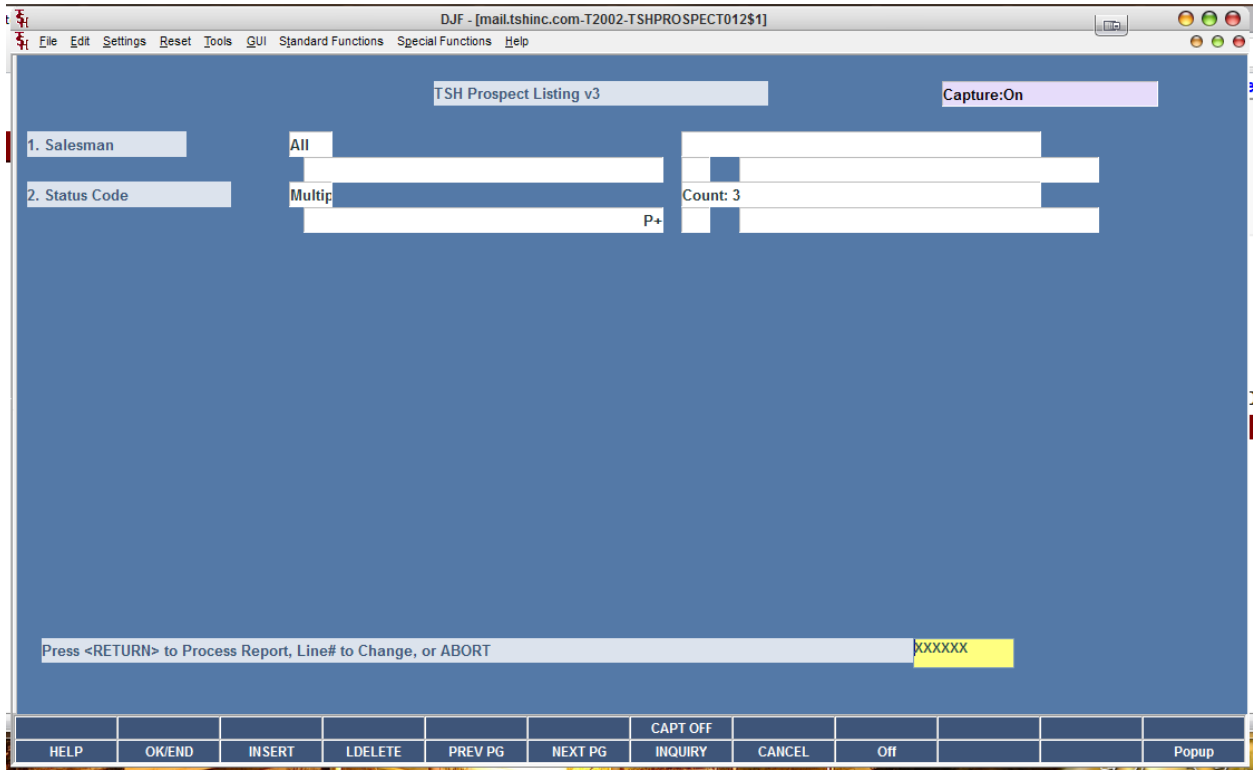
And run TSH Prospect Listing V3

The Sales projection report is also available – currently we are using version 3 of this report

Enter your criteria – Salesman/ all/range/selected

And prospect codes /all /range/selected

Then ok end to run your report in crystal



Once your report comes up – you can drill down by salesman and status code on the right hand side.

TSH Prospect Listing By Salesman

Salesman: 195 Scott Ostro

| Stat | Prospect | Customer Name | Contact Industry/Phone | Buy Group/ License/#Users | System Source/C |
|------|--------------|---|---|------------------------------|------------------------|
| P | DALLAS | Dallas Medical Supply 2552 Summit Avebue #411 Planos TX 75074-3 | David Glatstein 01 Medical Distribution | NDC T 6 | QuickBook IMCO |
| P | 214768 | New Global Marketing 1 Hillside Drive dRUMS PA 07621 | Allan Blatt 02 Wholesale Distribution | N/A T 4 | quickbooks NYW HOLE |
| P- | PhysicianSup | Physician Supply Company 5041 Spencer Highway Pasadena TX 77505 | Christine Owens 52 IMCO Member 866-991-1665 | IMCO T 7 | QUICKBO IMCO |

Or export to a pdf and email to sales managers for our weekly meetings..

Export

Format:

Destination:

OK
 Cancel
 Help

saleslisting_tsh.pdf - Adobe Reader

File Edit View Window Help

1 / 1 87.1%

Comment Share

SH Prospect Listing By Salesman 6/4/2012 7:48:01PM Page 1 of 1

Report Criteria: Salesman - * - Status Code- P

| Salesman: | 195 | Scott Ostro | Contact | Buy Group/ | System | This/Last Report | | | | | | |
|-----------|--------------|--|---|----------------|--|------------------|-----------|-----------|------------|------|------|------|
| Stat | Prospect | Customer Name | Industry/Phone | License#/Users | Source/Competition | Recall Date | Close Mo. | Prob Time | Prob Close | Demo | Prop | Cont |
| P | DALLAS | Dallas Medical Supply 2552 Summit Avebue #411 Planos TX 75074-37 | David Glatstein 01 Medical Distribution | NDC T 6 | QuickBooks IMCO | 6/5/2012 | | % | % | Y | Y | N |
| P | 214768 | New Global Marketing 1 Hillside Drive dRUMS PA 07621 | Allan Blatt 02 Wholesale Distribution | N/A T 4 | quickbooks NYWHOLESALE \$10 - 20 Mill | 6/4/2012 | | % | % | Y | Y | Y |
| P- | PhysicianSup | Physician Supply Company 5041 Spencer Highway Pasadena TX 77505 | Christine Owens 52 IMCO Member 866-991-1665 | IMCO T 7 | QUICKBOOKS ENTRPRISE IMCO | 6/5/2012 | | % | % | Y | N | N |