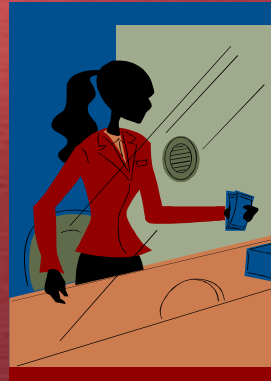


Increasing Your Sales with MDS

TSH User Meeting

June 11, 2012

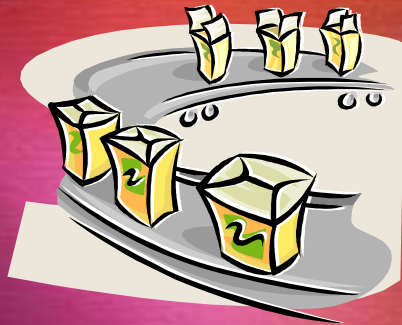


Overview- MDS Sales Tools

- Direct Fulfillment
- Consignments to Customer
- Memorized Orders/Standing Orders
- Ship Complete/Invoice Complete/Monthly Billing
- Targeting Potential Sales
- Prospect Tracking
- Email Blasting

Direct Fulfillment

- Allows you to ship to your customer's customers
- Custom forms & labels with your customer's logo and packing documents



Selecting Ship To Location

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Order Entry Header
Order# 141819 Date 06/04/12 Company 01 TSH Medical Company Sell Whse 001 NEW YORK, NY Ship Whse 001 NEW YORK, NY

Bill
Customer SCOTTG
SCOTT G MEDICAL
123 MAIN STREET
DALLAS
Cust Class 000

2.Req Dt
3.As of Dt
4.Terms
5.Source
6.Cust PO#
7.Direct
8.Spec Ins
9.Caller
10.Ship Via
11.Cash
12.M/Bill

Ship-To
1.

Inquiry List
Settings Help

MDS SHIP TO LOOKUP					
SHIPTO	CUSTOMER	NAME	CITY	ST	ZIP
R - REPEAT					
000001	SCOTTG	Dr Jim Stockton	New Paltz	NY	25761
145 Main Street					
000002	SCOTTG	John Smith, Inc.	Pinebrook	NY	22198
4590 East Holder Str Suite 23					

Add OK Cancel

Selecting Ship To Location

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Order Entry Header
Order# 141819 Date 06/04/12 Company 01 TSH Medical Company Sell Whse 001 NEW YORK, NY Ship Whse 001 NEW YORK, NY

Bill
Customer SCOTTG
SCOTT G MEDICAL
123 MAIN STREET
DALLAS
Cust Class 000

2.Req Dt
3.As of Dt
4.Terms
5.Source
6.Cust PO#
7.Direct
8.Spec Ins
9.Caller
10.Ship Via
11.Cash
12.M/Bill

Ship-To
1.

Inquiry List
Settings Help

MDS SHIP TO LOOKUP					
SHIPTO	CUSTOMER	NAME	CITY	ST	ZIP
R - REPEAT					
000001	SCOTTG	Dr Jim Stockton	New Paltz	NY	25761
145 Main Street					
000002	SCOTTG	John Smith, Inc.	Pinebrook	NY	22198
4590 East Holder Str Suite 23					

Add OK Cancel

Selecting Ship To Location

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Order Entry Header
Order# 141819 Date 06/04/12 Company 01 TSH Medical Company Sell Whse 001 NEW YORK, NY Ship Whse 001 NEW YORK, NY

Bill
Customer SCOTTG
SCOTT G MEDICAL
123 MAIN STREET
DALLAS
Cust Class

2.Req Dt
3.As of Dt
4.Terms
5.Source
6.Cust PO#
7.Direct
8.Spec Ins
9.Caller
10.Ship Via
11.Cash
12.M/Bill

Ship-To
1.

Inquiry List
Settings Help

MDS SHIP TO LOOKUP					
SHIPTO	CUSTOMER	NAME	CITY	ST	ZIP
R - REPEAT					
000001	SCOTTG	Dr Jim Stockton	New Paltz	NY	25761
145 Main Street					
000002	SCOTTG	John Smith, Inc.	Pinebrook	NY	22198
4590 East Holder Str Suite 23					

Add OK Cancel

000

Scott G Medical is doing direct fulfillment for their customer John Smith. By selecting that customer's ship to location in order entry, MDS will print packing documents as though the shipment came from Scott Medical.

Selecting template of shipping label

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Ship To Maintenance

Customer # SCOTTG SCOTT G MEDICAL

Ship To # 000002

1.Ship To Name John Smith, Inc.

2.Ship To Addr1 4590 East Holder Street

3.Ship To Addr2 Suite 23

4.Ship To Addr3

5.City Pinebrook

6.State NY Country 000 U.S.A.

7.Zip Code 22193 8.DEA Code

9.Ship Method

10.Ship Zone

11.Special Instr

12.Tax Juris. OOS OUT OF STATE

13.Tax Exempt #

14.Service Whse

15.GLN Number

16.Primary Route Stop

17.Secondary Route Stop

18.Attention Mr. John Smith

19.Pick Priority

20.DEA#

21.DEA Expires

22.License#

23.Lic Exp. Date

24.Drug Type

25.Phone#

26.Res'Com C

27.Ship Label Template
ScottMedical-PackingLabel.prn

Template Name
ScottMedical-PackingLabel.prn
ScottMedical-PackingList.prn

HELP OK/END INSERT LDELETE PREVPG NEXT PG INQUIRY CANCEL Off Popup

Selecting template of shipping label

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Ship To Maintenance

Customer # SCOTTG SCOTT G MEDICAL

Ship To # 000002

1.Ship To Name John Smith, Inc.

2.Ship To Addr1 4590 East Holder Street

3.Ship To Addr2 Suite 23

4.Ship To Addr3

5.City Pinebrook

6.State NY Country 000 U.S.A.

7.Zip Code 22193 8.DEA Code

9.Ship Method

10.Ship Zone

11.Special Instr

12.Tax Juris. OOS OUT OF STATE

13.Tax Exempt #

14.Service Whse

15.GLN Number

16.Primary Route Stop

17.Secondary Route Stop

18.Attention Mr. John Smith

19.Pick Priority

20.DEA#

21.DEA Expires

22.License#

23.Lic Exp. Date

24.Drug Type 1 2 3

25.Phone#

26.Res'Com C

27.Ship Label Template
ScottMedical-PackingLabel.prn

Template Name
ScottMedical-PackingLabel.prn
ScottMedical-PackingList.prn

HELP OK/END INSERT LDELETE PREVPG NEXT PG INQUIRY CANCEL OFF Popup

In setting up the packing documents, TSH will create the template for the shipping forms. You will then only have to select the template for that Ship to location Maintenance.

Drop shipping for your Customer with their Packing Slip

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Ship To Maintenance

Customer # SCOTTG SCOTT G MEDICAL

Ship To # 000002

1.Ship To Name John Smith, Inc.

2.Ship To Addr1 4590 East Holder Street

3.Ship To Addr2 Suite 23

4.Ship To Addr3

5.City Pinebrook

6.State NY Country 000 U.S.A.

7.Zip Code 22198 8.DEA Code

9.Ship Method

10.Ship Zone

11.Special Instr

12.Tax Juris. 00S OUT OF STATE

13.Tax Exempt #

14.Service Whse

15.GLN Number

16.Primary Route Stop

17.Secondary Route Stop

18.Attention Mr. John Smith

19.Pick Priority

20.DEA#

21.DEA Expires

22.License#

23.Lic Exp. Date

24.Drug Type

25.Phone#

26.Res/Com C

27.Ship Label Template ScottMedical-PackingLabel.prn

28.Pack Slip Template ScottMedical-PackingList.prn

Template Name
ScottMedical-PackingLabel.prn
ScottMedical-PackingList.prn

Packing Slip

Page: 1



**SCOTT
MEDICAL
SUPPLY
INC.**

Shipping Document

Order Number

01141821001

Ship-to: 000002

John Smith, Inc.
4590 East Holder Street
Suite 23
Pinebrook NY 22198

Order Date:	06/04/12	Ship Via:	OUR TRUCK	Route:	
Required Date:	06/04/12	Customer Order #:	9990		
Cancel Date:		Caller:	SO		
Order Taker:	SY FERTIG				
License:	N Exp:	DEA#:			
Special Instructions:					

Line	Location	Item Number / Description	Ordered	UM	Shipped	UM	B/O Qty	Unit Price	UM
1	0300B	17100 UNIVERSAL PRECAUTION KIT	2	EA	2	EA	0	0.000	EA

Consignments to Customer

- Allows you to place merchandise in your customer's hands for sale
- Tracks what is still in your customer's hands until sold or returned
- Automatic Billing when you are notified of end-user sale

Order Entry for Consignment

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Order Entry Header
Company 01 Sell Whse 001 Ship Whse 001
Order# 141794 Date 05/27/12 TSH Medical Company NEW YORK, NY NEW YORK, NY

Bill Customer SCOTTG
SCOTT G MEDICAL Country 000
123 MAIN STREET U.S.A.
DALLAS TX 07013
Cust Class 01 HOSPITALS

Ship-To 1.
SCOTT G MEDICAL Country 000
123 MAIN STREET U.S.A.
DALLAS TX 07013
Salesman 004 INHOUSE SALES

2. Req Dt 05/28/12 Future N Blkt N 13. Cons/Rent C Return Date 06/28/12
3. As of Dt
4. Terms 01 NET 30
5. Source 01 CUSTOMER
6. Cust PO# 9990
7. Direct Vendor
8. Spec Ins
9. Caller S0
10. Ship Via 01 UPS
11. Cash N
12. M/Bill N

Inquiry List
Settings Help
ACCEPTABLE VALUES :
C Consignment
R Rental
N Normal

Exp

Help for setting Return Date

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Order Entry Header
Order# 141794 Date 05/27/12 Company 01 TSH Medical Company Sell Whse 001 NEW YORK, NY Ship Whse 001 NEW YORK, NY

Bill
Customer SCOTTG
SCOTT G MEDICAL
123 MAIN STREET
Country 000 U.S.A.
DALLAS TX 07013
Cust Class 01 HOSPITALS

Ship-To
1.
SCOTT G MEDICAL
123 MAIN STREET
Country 000 U.S.A.
DALLAS TX 07013
Salesman 004 INHOUSE SALES

2. Req Dt 05/28/12 Future N Blkt N
3. As of Dt
4. Terms
5. Source
6. Cust PO#
7. Direct
8. Spec Ins
9. Caller
10. Ship Via
11. Cash
12. M/Bill

13. Cons/Rent C Return Date 06/28/12
14. Inv Comp N

GENERAL HELP
If the order is a consignment or rental order enter the return date for the items or 'RETURN' for 30 days after the required date system default.

End Help
Inquiry

Exp

MDS INQ	AR INQ	CUSTOMER	SALES MGT	CRM	ORD/HOLD	CUSTNOTE	ORDNOTE		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	OFF	Popup

Consignment Inquiry by Item

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Open Consignments by Item

Item Number	Description	Price	Um	Cost	Um	Retail	Um
NS01102-700	EKG MACHINE AT-2PLUS ITRP		EA	3105.000	EA	5253.000	EA

Whs	Loc	BO	D	Sel	Stk	OnHand	On P/O	Intran	B/O	Avail	Future
ALL	NEW	Y	N	EA	EA	40			10	25	

Substitutes

1.											
2.											

Ln#	Consignment#	ConLn#	Ord Date	Price	OnCons	InPick	Open	Billed
Customer Name			Due Date	PrcOvr	D/S	Fut	ShipFrom	
1	01000005	001	05/27/12	5253.000		5		5
MEDICAL ASSOCIATES OF			05/28/12		ND	N	001	
2	01000006	001	05/27/12	5253.000		5		5
SCOTT G MEDICAL			05/28/12		ND	N	001	
3								
4								
Totals			Value	5253.000		5		5

Enter END to exit, NEXT PG or PREV PG

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	Popup
------	--------	--------	---------	---------	---------	---------	--------	-----	-------

Consignment Detail Inquiry

File Edit Settings Ereset Tools GUI Standard Functions Special Functions Help

Detail Open Consignment (Line Items)

Consignment# 01-000005 Release# 01141799001 Order Date 05/27/12
 Customer# MERCYCIND MEDICAL ASSOCIATES OF Due Date 05/28/12

Ln#	Item Number Description Vendor Number	Consigned DropShip	InPick ShipFrom SellUm	Open Disc% Department	Billed Price Value	F H T
1	NS01102-700 EKG MACHINE AT-2PLUS ITRP	5 / EA ND	/ EA 001	5 / EA EA	/ EA 5253.000 / EA 26265.00	N Y
2		/	/	/	/	
3		/	/	/	/	
4		/	/	/	/	

Enter END to exit, NEXT PG or PREV PG : XXXXXX

HEADER	LINE ITEMS	SPEC INST	SERIALS						
--------	------------	-----------	---------	--	--	--	--	--	--

Completing the Consignment

Consignment		Header	Input
Company	01 TSH Medical Company	Sell Whse	001 NEW YORK, NY
Bill To	SCOTTG SCOTT G MEDICAL 123 MAIN STREET DALLAS TX 07013	1.Ship To	 SCOTT G MEDICAL 123 MAIN STREET DALLAS TX 07013
2.Ship Date	05/27/12		
3.Commission%	0.00		
4.As of Date	05/09/12		
5.Salesman	004 INHOUSE SALES		
6.Ship Via	01 UPS		
7.Terms	01 NET 30		
8.Spec Ins			
9.Order Source	01 CUSTOMER PHONE IN		
10.Cust PO#	1111		
11.Monthly Bill	N		

Consign#
000006

Release#
141808-001

Date

Enter Line# to Change,DELETE to Delete,0 to Accept XXXXXXXX

MDS INQ.	AR INQ								
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	OFF	Popup

Identify the Items sold or returned

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

C0 01 WHSE 001 CUSTOMER SCOTTG SCOTT G MEDICAL REL# 141808-001

Line #	Prod#	Description	Open	Price	Discount	Cost	Cust#	Comm%	Tax	PH
1	NS01102-700	EKG MACHINE AT-2PLUS ITRP	1 / EA	5253.000 / EA		3677.100 / EA			Y	
2										
3										
4										

Enter Line # to Change or 0 to Accept XXXXXX

Open Consignments

```

PAGE 1          *** OPEN CONSIGNMENTS BY CUSTOMER ***      13.05.16      05/27/12

CO CUSTOMER      CONS# CON DATE RTN DATE PRODUCT#      DESCRIPTION      SERIAL#  ORD QTY  OPN QTY  VALUE  COST
-----
C1 MERCYCIND      000005 05/27/12 07/15/12 NSC1102-700      EKG MACHINE AT-2PLUS      5      5      26265.00 18385.50 001
*** TOTALS FOR CONSIGNMENT NUMBR 000005
-----
*** TOTALS FOR CUSTOMER# MERCYCIND      MEDICAL ASSOCIATES OF      5      5      26265.00 18385.50
C1 SCOTTG      000006 05/27/12 07/10/12 NSC1102-700      EKG MACHINE AT-2PLUS      5      5      26265.00 18385.50 001
*** TOTALS FOR CONSIGNMENT NUMBR 000006
-----
*** TOTALS FOR CUSTOMER# SCOTTG      SCOTT G MEDICAL      5      5      26265.00 18385.50
C1 SJU      000002 01/11/06 01/31/06 RSPATROL      ROSS PATROL ENTERAL      VARI      1      1      45.50 25.00 001
*** TOTALS FOR CONSIGNMENT NUMBR 000002
-----
*** TOTALS FOR CUSTOMER# SJU      ST. JOHN'S UNIVERSITY      1      1      45.50 25.00
C1 UHS      000003 07/02/06 08/20/06 RSCOMP      ROSS COMPANION ENTER      105      1      1      40.00 30.00 001
*** TOTALS FOR CONSIGNMENT NUMBR 000003
-----
*** TOTALS FOR CUSTOMER# UHS      UNIVERSAL HOSPITAL SERVIC      1      1      40.00 30.00
-----
*** TOTALS FOR COMPANY# 01      12      12      52615.50 36326.00
-----
*** FINAL TOTALS      52615.50 36326.00

```

Recurring Sales/ Memorized Orders

- Customers who order on a regular basis- obtain list for internal salesperson to call and obtain orders
- Shows which items have previously been bought
- Flexible assignment of re-order cycle

Creating A Recurring Order

Sales Quote Entry Header				Company	01	Sell Whse	001	Ship Whse	001	
Order#	100298	Date	05/27/12	TSH Medical Company		NEW YORK, NY		NEW YORK, NY		
Bill					Ship-To					
Customer	SCOTTG					1.				
SCOTT G MEDICAL			Country	000	SCOTT G MEDICAL			Country	000	
123 MAIN STREET			U.S.A.		123 MAIN STREET			U.S.A.		
DALLAS TX 07013					DALLAS TX 07013					
Cust Class	01	HOSPITALS			Salesman	004	INHOUSE SALES			
2. Req Dt	05/28/12	Future	N	Blkt	N	13. Cons/Rent	N	Re		
3. As of Dt						14. Inv Comp	N			
4. Terms	01	NET 30			15. Ship Comp	N				
5. Source	01	CUSTOMER PHONE IN			16. Cancel/Exp Dt					
6. Cust PO#					17. Ord Hold	Y	Re			
7. Direct		Vendor			18. LIC#					
8. Spec Ins					19. Dea#					
9. Caller	PHONE			20. Route						
10. Ship Via	01	UPS			21. Dly Stop					
11. Cash	N				22. Frit Class					
12. M/Bill	N				23. Frequency					

Inquiry List

Settings Help

ACCEPTABLE VALUES :

D	Daily
W	Weekly
M	Monthly
Q	Quarterly
B	Bi-monthly
S	Semi annual
I	List Specific Dates
N	Never

MDS INQ	AR INQ	CUSTOMER	SALES MGT	CRM	ORD/HOLD	NEXT REC	CUS
---------	--------	----------	-----------	-----	----------	----------	-----

Memorized Orders

Facility
 Facility Name
 Customer#
 Customer Name
 Next Order Dt
 Order Date
 Frequency

Memorized Orders

Facility To

Facility Name To

Customer# To

Customer Name

Next Order Dt To

Order Date To

Frequency Operator

In List

 Last

Ln#	Facility	Quote	Customer Number	Customer Name	Amount	Fq	Order Dt	Next Dt	Contact	Phone#	Conv	Conv	Ord
1.		01100302	MERCYIC	MERCY HOSPITAL	63.30	M	05/27/12	06/27/12			N		
2.		01100301	MARCOW	MICHAEL MARCOW	42.48	M	05/27/12	06/27/12			N		
3.		01100298	SCOTTG	SCOTT G MEDICAL	142.50	M	05/27/12	06/27/12			N		
4.		01100295	UMC	UNIVERSITY MEDIC	4732.00		04/24/12	05/28/12	JULIANNE RAUCO	212-555-1213	N		
5.		01100300	UMC	UNIVERSITY MEDIC	2.09	M	05/27/12	06/27/12	JULIANNE RAUCO	212-555-1213	N		
6.													
7.													
8.													
9.													
10.													
11.													

Enter Line# to Change Next Order Date, or S to Change Search Criteria

Search	Quote Mnt	Convert	Order Mnt	New Quote	Duplicate		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CA

Memorized Orders



Memorized Orders

Facility To
 Facility Name To
 Customer# To
 Customer Name
 Next Order Dt To
 Order Date To
 Frequency Operator

In List
Last

Ln#	Facility	Quote	Customer Number	Customer Name	Amount	Fq Order Dt	Next Dt	Contact	Phone#	Conv	Conv Ord
1.		01100302	MERCYIC	MERCY HOSPITAL	63.30	M 05/27/12	06/27/12			N	
2.		01100301	MARCOW	MICHAEL MARCOW	42.48	M 05/27/12	06/27/12			N	
3.		01100298	SCOTTG	SCOTT G MEDICAL	142.50	M 05/27/12	06/27/12			N	
4.		01100295	UMC	UNIVERSITY MEDIC	4732.00		04/24/12	05/28/12	JULIANNE RAUCO 212-555-1213	N	
5.		01100300	UMC	UNIVERSITY MEDIC	2.09	M 05/27/12	06/27/12	JULIANNE RAUCO 212-555-1213		N	
6.											
7.											
8.											
9.											
10.											
11.											

By utilizing the fields above, you can easily identify the orders you are looking for by narrowing your search.

Enter Line# to Change Next Order Date, or S to Change Search Criteria

Search	Quote Mnt	Convert	Order Mnt	New Quote	Duplicate		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CA

Memorized Orders



Memorized Orders

Facility: To
 Facility Name: To
 Customer#: To
 Customer Name:
 Next Order Dt: 05/27/12 To 06/28/12
 Order Date: To
 Frequency: Operator:

In List:
Last

Ln#	Facility	Quote	Customer Number	Customer Name	Amount	Fq Order Dt	Next Dt	Contact	Phone#	Conv	Conv Ord
1.		01100302	MERCYIC	MERCY HOSPITAL	63.30	M 05/27/12	06/27/12			N	
2.		01100301	MARCOW	MICHAEL MARCOW	42.48	M 05/27/12	06/27/12			N	
3.		01100298	SCOTTG	SCOTT G MEDICAL	142.50	M 05/27/12	06/27/12			N	
4.		01100295	UMC	UNIVERSITY MEDIC	4732.00	M 04/24/12	05/28/12	JULIANNE RAUCO	212-555-1213	N	
5.		01100300	UMC	UNIVERSITY MEDIC	2.09	M 05/27/12	06/27/12	JULIANNE RAUCO	212-555-1213	N	
6.											
7.											
8.											
9.											
10.											
11.											

By utilizing the fields above, you can easily identify the orders you are looking for by narrowing your search.

Enter Line# to Change Next Order Date, or S to Change Se

By changing the conversion flag to Y, the quote will be converted to an order.

Search	Quote Mnt	Convert	Order Mnt	New Quote	Duplicate	
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY CA

Memorized Orders

Memorized Orders

Facility: [] To []

Facility Name: [] To []

Customer#: [] To []

Customer Name: []

Next Order Dt: 05/27/12 To 06/28/12

Order Date: [] To []

Frequency: [] Operator: []

In List: [5]

Last: []

Ln#	Facility	Quote	Customer Number	Customer Name	Amount	Fq Order Dt	Next Dt	Contact	Phone#	Conv	Conv	Ord
1.		01100302	MERCYIC	MERCY HOSPITAL	63.30	M 05/27/12	06/27/12			N		
2.		01100301	MARCOW	MICHAEL MARCOW	42.48	M 05/27/12	06/27/12			N		
3.		01100298	SCOTTG	SCOTT G MEDICAL	142.50	M 05/27/12	06/27/12			N		
4.		01100295	UMC	UNIVERSITY MEDIC	4732.00	M 04/24/12	05/28/12	JULIANNE RAUCO	212-555-1213	N		
5.		01100300	UMC	UNIVERSITY MEDIC	2.09	M 05/27/12	06/27/12	JULIANNE RAUCO	212-555-1213	N		
6.												
7.												
8.												
9.												
10.												
11.												

Enter Line# to Change Next Order Date, or S to Change Se

By utilizing the fields above, you can easily identify the orders you are looking for by narrowing your search.

By changing the conversion flag to Y, the quote will be converted to an order.

Search	Quote Mnt	Convert	Order Mnt	New Quote	Duplicate		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CA

Memorized Orders

Memorized Orders

Facility: [] To []

Facility Name: [] To []

Customer#: [] To []

Customer Name: []

Next Order Dt: 05/27/12 To 06/28/12

Order Date: [] To []

Frequency: [] Operator: []

In List: [5]

Last: []

Ln#	Facility	Quote	Customer Number	Customer Name	Amount	Fq Order Dt	Next Dt	Contact	Phone#	Conv	Conv	Ord
1.		01100302	MERCYIC	MERCY HOSPITAL	63.30	M 05/27/12	06/27/12			N		
2.		01100301	MARCOW	MICHAEL MARCOW	42.48	M 05/27/12	06/27/12			N		
3.		01100298	SCOTTG	SCOTT G MEDICAL	142.50	M 05/27/12	06/27/12			N		
4.		01100295	UMC	UNIVERSITY MEDIC	4732.00	M 04/24/12	05/28/12	JULIANNE RAUCO	212-555-1213	N		
5.		01100300	UMC	UNIVERSITY MEDIC	2.09	M 05/27/12	06/27/12	JULIANNE RAUCO	212-555-1213	N		
6.												
7.												
8.												
9.												
10.												
11.												

Enter Line# to Change Next Order Date, or S to Change Se

By utilizing the fields above, you can easily identify the orders you are looking for by narrowing your search.

By changing the conversion flag to Y, the quote will be converted to an order.

Search	Quote Mnt	Convert	Order Mnt	New Quote	Duplicate	
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY CA

Memorized Orders

Memorized Orders

Facility: [] To []

Facility Name: [] To []

Customer#: [] To []

Customer Name: []

Next Order Dt: 05/27/12 To 06/28/12

Order Date: [] To []

Frequency: [] Operator: []

In List: [5]

Last

Ln#	Facility	Quote	Customer Number	Customer Name	Amount	Fq Order Dt	Next Dt	Contact	Phone#	Conv	Conv	Ord
1.		01100302	MERCYIC	MERCY HOSPITAL	63.30	M 05/27/12	06/27/12			N		
2.		01100301	MARCOW	MICHAEL MARCOW	42.48	M 05/27/12	06/27/12			N		
3.		01100298	SCOTTG	SCOTT G MEDICAL	142.50	M 05/27/12	06/27/12			N		
4.		01100295	UMC	UNIVERSITY MEDIC	4732.00	M 04/24/12	05/28/12	JULIANNE RAUCO	212-555-1213	N		
5.		01100300	UMC	UNIVERSITY MEDIC	2.09	M 05/27/12	06/27/12	JULIANNE RAUCO	212-555-1213	N		
6.												
7.												

to Change Se

Convert INSERT Order Mnt LDELETE New Quote PREV PG Duplicate NEXT PG INQUIRY CA

The function keys allow for easy conversion to orders. The insert key allows for new Memorized order to be added on the fly.

By utilizing the fields above, you can easily identify the orders you are looking for by narrowing your search.

By changing the conversion flag to Y, the quote will be converted to an order.

Standing Orders With Pending Dates

DATE: 05/27/12

STANDING ORDERS WITH ONE OR NO RELEASE DATE LEFT

PAGE: 1

COMPANY 01 TSH Medical Company

STANDING ORDER#	ENTERED DATE	REMAIN REL DATE	CUSTOMER NUMBER	CUSTOMER NAME
01100294	04/23/12	04/23/12	UMC	UNIVERSITY MEDICAL CENTER
01100295	04/24/12	04/24/12	UMC	UNIVERSITY MEDICAL CENTER
01100298	05/27/12	05/28/12	SCOTTG	SCOTT G MEDICAL
01100300	05/27/12	05/28/12	UMC	UNIVERSITY MEDICAL CENTER
01100301	05/27/12	05/28/12	MARCOW	MICHAEL MARCOWITZ MD
01100302	05/27/12	05/28/12	MERCYIC	MERCY HOSPITAL

Setting up Shipping and Invoicing options

- Ship Complete
- Invoice Complete
- Monthly Billing

Setting Up Ship Complete

Order Entry Header		Company	01	Sell Whse	001	Ship Whse	001
Order#	141806	Date	05/27/12	TSH Medical Company	NEW YORK, NY	NEW YORK, NY	
Bill	Customer			Ship-To			
	SCOTTG			1.			
	SCOTT G MEDICAL			SCOTT G MEDICAL			Country 000
	123 MAIN STREET			123 MAIN STREET			Country 000
	DALLAS TX 07013			DALLAS TX 07013			
	Cust Class	01	HOSPITALS	Salesman	004	INHOUSE SALES	
2. Req Dt	05/28/12	Future	N	13. Cons/Rent	N	Return Date	
3. As of Dt				14. Inv Comp	N		
4. Terms	01	NET 30		15. Ship Comp	N		
5. Source	01	CUSTOMER PHONE IN					
6. Cust PO#	0099						
7. Direct		Vendor					
8. Spec Ins							
9. Caller	S0						
10. Ship Via	01	UPS					
11. Cash	N						
12. M/Bill	N						

MDS INQ	AR INQ	CUSTOMER	SALES MGT	CRM	ORD
HELP	OK/END	INSERT	LDELETE	PREV PG	NE

Inquiry List

Settings Help

ACCEPTABLE VALUES :

Y

B

N

Utilizing Ship Complete

Order Entry Header		Company	01	Sell Whse	001	Ship Whse	001
Order#	141806	Date	05/27/12	TSH Medical Company	NEW YORK, NY	NEW YORK, NY	
Bill	Customer			Ship-To			
	SCOTTG			1.			
	SCOTT G MEDICAL			Country		000	
	123 MAIN STREET			U.S.A.			
	DALLAS TX 07013			DALLAS TX		07013	
	Cust Class	01	HOSPITALS	Salesman	004	INHOUSE SALES	
2.Req Dt	05/28/12	Future	N	13.Cons/Rent	N	Return Date	
3.As of Dt				14.Inv Comp	N		
4.Terms	01	NET 30		15.Ship Comp	Y		
5.Source	01	CUSTOMER PHONE IN		16.Cancel Dt			
6.Cust PO#	0099			17.Ord Hold	N	Reason	
7.Direct		Vendor		18.LIC#	N		
8.Spec Ins				19.Dea#		Exp	
9.Caller	S0			20.Route			
10.Ship Via	01	UPS		21.Dly Stop			
11.Cash	N			22.Frt Class	XXX		
12.M/Bill	N						

MDS INQ	AR INQ	CUSTOMER	SALES MGT	CRM	ORD/HOLD			CUSTNOTE	ORDNOTE		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup

Utilizing Ship Complete

Order Entry Header		Company	01	Sell Whse	001	Ship Whse	001
Order#	141806	Date	05/27/12	TSH Medical Company	NEW YORK, NY	NEW YORK, NY	
Bill	Customer			Ship-To			
	SCOTTG			1.			
	SCOTT G MEDICAL			SCOTT G MEDICAL			Country 000
	123 MAIN STREET			123 MAIN STREET			Country 000
	DALLAS TX 07013			DALLAS TX 07013			
	Cust Class	01	HOSPITALS	Salesman	004	INHOUSE SALES	
2.Req Dt	05/28/12	Future	N	13.Cons/Rent	N	Return Date	
3.As of Dt				14.Inv Comp	N		
4.Terms	01	NET 30		15.Ship Comp	Y		
5.Source	01	CUSTOMER PHONE IN		16.Cancel Dt			
6.Cust PO#	0099			17.Ord Hold	N	Reason	
7.Direct		Vendor		18.LIC#	N		
8.Spec Ins				19.Dea#		Exp	
9.Caller	S0			20.Route			
10.Ship Via							
11.Cash							
12.M/Bill							

Once ship complete is selected, MDS will not allow the order to ship until all items ordered are available to ship.

MDS INQ	AR INQ	CUSTOMER	SALES MGT	CRM	ORD/HOLD		CUSTNOTE	ORDNOTE	
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	Popup

Ship Complete Report

DATE 02:37:15pm 27 May 2012 SHIP COMPLETE SHIPMENTS NOT BILLED REGISTER PAGE 1

ORDER.....	A.CUST.NO....	CUST.NAME.....	ORD DATE	TOT.AMT.....
01141806	SCOTTG	SCOTT G MEDICAL	05/27/12	575.28
***				575.28

1 records listed.

Invoice Complete feature

- Scott G Medical does not want multiple invoices on his orders.
- By Selecting the Invoice complete option, Scott G Medical will only get one invoice per order.
- MDS offers reporting tools so you can keep track of orders that have shipped, but have not yet been billed.

Invoice Complete

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Order Entry Header **Company** 01 **Sell Whse** 001 **Ship Whse** 001
Order# 141822 **Date** 06/04/12 **TSH Medical Company** **NEW YORK, NY** **NEW YORK, NY**

Bill **Ship-To**
Customer SCOTTG 1. SCOTT G MEDICAL **Country** 000
SCOTT G MEDICAL U.S.A. 123 MAIN STREET U.S.A.
123 MAIN STREET
DALLAS TX 07013 DALLAS TX 07013
Cust Class 01 HOSPITALS **Salesman** 004 INHOUSE SALES

2. **Req Dt** 06/04/12 **Future** N **Blkt** N
3. **As of Dt**
4. **Terms** 01 NET 30
5. **Source** 01 CUSTOMER PHONE IN
6. **Cust PO#** 44499
7. **Direct** Vendor
8. **Spec Ins**
9. **Caller** S0
10. **Ship Via** 01 UPS
11. **Cash** N
12. **M/Bill** Y

13. **Cons/Rent** N **Return Date**
14. **Inv Comp** Y
15. **Ship Comp** N

Inquiry List
Settings Help
ACCEPTABLE VALUES :
Y
N

MDS INQ	AR INQ	CUSTOMER	SALES MGT	CRM	ORD/HOLD
HELP	OKEND	INSERT	LDELETE	PREV PG	NEXT PG

pup

Invoice Complete

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Order Entry Header **Company** 01 **Sell Whse** 001 **Ship Whse** 001
Order# 141822 **Date** 06/04/12 **TSH Medical Company** **NEW YORK, NY** **NEW YORK, NY**

Bill **Ship-To**
Customer SCOTTG 1. SCOTT G MEDICAL **Country** 000
SCOTT G MEDICAL SCOTT G MEDICAL 123 MAIN STREET U.S.A.
123 MAIN STREET 123 MAIN STREET U.S.A.
DALLAS TX 07013 DALLAS TX 07013
Cust Class 01 HOSPITALS **Salesman** 004 INHOUSE SALES

2.Req Dt 06/04/12 Future N Blkt N
3.As of Dt
4.Terms 01 NET 30
5.Source 01 CUSTOMER PHONE IN
6.Cust PO# 44499
7.Direct Vendor
8.Spec Ins
9.Caller S0
10.Ship Via 01 UPS
11.Cash N
12.M/Bill Y

13.Cons/Rent N Return Date
14.Inv Comp Y
15.Ship Comp N

Inquiry List
Settings Help
ACCEPTABLE VALUES :
Y
N

This option can be set in the customer file or selected on an individual order.

MDS INQ	AR INQ	CUSTOMER	SALES MGT	CRM	ORD/HOLD
HELP	OKEND	INSERT	LDELETE	PREV PG	NEXT PG

pup

Monthly Billing

- MDS offers your customers the option of getting all their invoices at the end of the period.
- The invoices can be printed with an end of period consolidated statement.
- Invoices are created during the period, but the printing is suppressed. At month end the statement prints with all invoices behind it.

Monthly Billing Info at Order Entry

Order Entry Header		Company	Sell Whse	Ship Whse									
Order#	141307	01	001	001									
Date	05/29/12	TSH Medical Company	NEW YORK, NY	NEW YORK, NY									
Bill		Ship-To											
Customer	SCOTTG	1.	000001										
SCOTT G MEDICAL	Country 000	Dr. Dr. Michael Scott	Country 000										
123 MAIN STREET	U.S.A.	145 Main Street	U.S.A.										
DALLAS TX 07013		Scranton PA 25761											
Cust Class 01 HOSPITALS		Salesman 004 INHOUSE SALES											
2.Req Dt	05/29/12	Future	N	Blkt N									
3.As of Dt													
4.Terms	01 NET 30	13.Cons/Rent		Return Date									
5.Source	01 CUSTOMER PHONE IN	<table border="1"> <thead> <tr> <th>Monthly</th> <th>Billing</th> <th>Information</th> </tr> </thead> <tbody> <tr> <td>1.Dept#</td> <td colspan="2">XXXXXXXXXXXXXXXXXXXXXXXXXXXX</td> </tr> <tr> <td>2.Req#</td> <td colspan="2"></td> </tr> </tbody> </table>			Monthly	Billing	Information	1.Dept#	XXXXXXXXXXXXXXXXXXXXXXXXXXXX		2.Req#		
Monthly	Billing	Information											
1.Dept#	XXXXXXXXXXXXXXXXXXXXXXXXXXXX												
2.Req#													
6.Cust PO#	9988												
7.Direct	Vendor												
8.Spec Ins													
9.Caller	SO												
10.Ship Via	01 UPS												
11.Cash	N												
12.M/Bill	Y												

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	OFF	Popup
------	--------	--------	---------	---------	---------	---------	--------	-----	-------

Monthly Billing Info at Order Entry

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Order Entry Header Company 01 Sell Whse 001 Ship Whse 001
 Order# 141307 Date 05/29/12 TSH Medical Company NEW YORK, NY NEW YORK, NY

Bill Ship-To
 Customer SCOTTG 1. 000001
 SCOTT G MEDICAL Dr. Dr. Michael Scott Country 000
 123 MAIN STREET U.S.A. 145 Main Street U.S.A.
 DALLAS TX 07013 Scranton PA 25761
 Cust Class 01 HOSPITALS Salesman 004 INHOUSE SALES

2.Req Dt 05/29/12 Future N Blkt N 13.Cons/Rent Return Date
 3.As of Dt
 4.Terms 01 NET 30
 5.Source 01 CUSTOMER PHONE IN
 6.Cust PO# 9988
 7.Direct Vendor
 8.Spec Ins
 9.Caller SO
 10.Ship Via 01 UPS
 11.Cash N
 12.M/Bill Y

Monthly Billing Information
 1.Dept# XXXXXXXXXXXXXXXXXXXXXXXXXXXX
 2.Req#

HELP OK/END INSERT LDELETE PREV PG NEXT PG INQUIRY CANCEL ON POPUP

Monthly billing allows the entry of a Department and/or Requisition number. This can be used to generate custom reports.

Monthly Billing Invoice

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Monthly Billing Invoice Print Capture:On

1. Fiscal Period

2. Customer#

Inquiry List

Settings Help

Fiscal Period Options

All Fiscal Periods

Fiscal Period Range

Specific Fiscal Period

END

Add OK Cancel

HELP	OK/END	INSERT	LDELETE	PR			
------	--------	--------	---------	----	--	--	--

Popu

Selecting Customers to Print Invoices

Monthly Billing Invoice Print

Capture:On

1. Fiscal Period

1205

1205

2. Customer#

Inquiry List

Settings Help

Customer Options
All Customers
Customer Range
Specific Customer
END

Add OK Cancel

Prints Statement Plus All Invoices for the Period Selected

Statement



TSH Import Company
1033 ROUTE 46
CLIFTON, NJ 07013

Tel: 973-777-8050

Please Remit To:
TSH Import Company
1033 ROUTE 46
CLIFTON, NJ 07013

Tel: 973-777-8050

SCOTT G MEDICAL
123 MAIN STREET
DALLAS TX 07013

Customer Number: SCOTTG
Salesman Name: INHOUSE SALES
Statement Date: 05/30/12
Last Payment: 03/15/71 \$0.00
Terms: 01 NET 30

To ensure proper credit, please check (X) all invoices being paid and return.

Tnx	Date	Transaction	Reference	Original Amount	Payment/Credits	X	Balance
INV	05/27/12	01519285	9990	135.50	0.00		135.50
INV	05/29/12	01519286	1111	10,506.00	0.00		10,506.00
	Total			10641.50	0.00		10,641.50
INV	05/18/12	01519284	1245	118.00	0.00		118.00
	Total	000001	PA 25761	118.00	0.00		118.00
	145 Main Street						

Prints Statement Plus All Invoices for the Period Selected

Statement



TSH Import Company
1033 ROUTE 46
CLIFTON, NJ 07013

Tel: 973-777-8050

Please Remit To:
TSH Import Company
1033 ROUTE 46
CLIFTON, NJ 07013

Tel: 973-777-8050

SCOTT G MEDICAL
123 MAIN STREET
DALLAS TX 07013

Customer Number: SCOTTG
Salesman Name: INHOUSE SALES
Statement Date: 05/30/12
Last Payment: 03/15/71 \$0.00
Terms: 01 NET 30

To ensure proper credit, please check (X) all invoices being paid and return.

Tnx	Date	Transaction	Reference	Original Amount	Payment/Credits	X	Balance
INV	05/27/12	01519285	9990	135.50	0.00		135.50
INV	05/29/12	01519286	1111	10,506.00	0.00		10,506.00
	Total			10641.50	0.00		10,641.50
INV	05/18/12	01519284	1245	118.00	0.00		118.00
	Total	000001	PA 25761	118.00	0.00		118.00
	145 Main Street						

Prints Statement Plus All Invoices for the Period Selected

Statement



TSH Import Company
1033 ROUTE 46
CLIFTON, NJ 07013

Please Remit To:
TSH Import Company
1033 ROUTE 46
CLIFTON, NJ 07013

Invoice



TSH Import Company
1033 ROUTE 46
CLIFTON, NJ 07013

Please Remit To:
TSH Import Company
1033 ROUTE 46
CLIFTON, NJ 07013

Tel: 973-777-8050

Tel: 973-777-8050

Inv Number

01519286

Page: 1

Bill-to: SCOTTG

SCOTT G MEDICAL
123 MAIN STREET
DALLAS TX 07013

Ship-to:

001 SY

SCOTT G MEDICAL
123 MAIN STREET
DALLAS TX 07013

Invoice Date:	05/29/12	Salesman:	INHOUSE SALES
Ship Date:	05/29/12	Ship Via:	UPS
Our Order No:	01141808001	Customer Order #:	1111

Targeting Potential Sales

- Missing Sales
- Inactive Customers
- Similar Customers and what they have purchased

Missing Sales Report selection

The screenshot shows a software window titled "Enter Values" with a toolbar containing "Preview", "Design", "Open Report", and "Save Report" buttons. The window contains several input fields with the following values:

Field Label	Value
Enter Fiscal Period (YYMM)	1205
Enter The Number of Periods To Have "0" Sales	6
Enter Number of Previous Periods To Include	6
Enter Minimum Units To Print	1
Enter Company # or 'A' For All	A
Enter Customer # or 'A' For All	

Missing Sales Report



MISSING SALES REPORT

FROM FISCAL PERIOD 1205 FOR 6 PERIODS OF ZERO SALES AND TOTAL SALES OF 12 PERIODS 05/27/12 15:19:50

PRODUCT CODE	DESCRIPTION	U/M	VENDOR	P/C	PREVIOUS 6 PERIODS 1111 TO 016.		LAST 6 PERIODS 1205 TO 1112	
					UNITS	SALES\$	UNITS	SALES\$
580320	GOWN EXAM 30X42 DSP 50/CS	CS	ABCO	058	2	39	0	0
82003	SCOTCHCAST 3" WHITE 10/BX	BX	MMM	038	2	179	0	0
82005	SCOTCHCAST 5" WHITE 10/BX	BX	MMM	038	2	289	0	0
NIPPT102	GLOVES NITRILE P-F SMALL	BX	ABCO	006	2	23	0	0
NIPPT103	GLOVES NITRILE P-F MEDIUM	BX	ABCO	006	2	23	0	0
NIPPT104	GLOVES NITRILE P-F LARGE	BX	ABCO	006	2	23	0	0
NIPPT105	GLOVES NITRILE P-F X LGE	BX	ABCO	006	2	23	0	0
NS11200-1	STEP STOOL	EA	BREWER	048	5	200	0	0
NS5-568	CAST SHEARS 8" ESMARCH	EA	MILTEX	047	4	324	0	0
NS7324	ORTHOFLX 4" J&J	BX	SENECA	038	8	643	0	0
NS7374-1	PLASTER EDGE 4"	BX	SENECA	038	4	166	0	0
NS7376	PLASTE EDGE 6"	BX	SENECA	038	4	230	0	0
NS81120	STOCKINETTE 12"N/3 2RL/CS	CS	ABCO	038	2	164	0	0
NSN0781220	STOCKINETTE 2" N/3	EA	ABCO	038	4	26	0	0
NSN0781320	STOCKINETTE 3" N/3	EA	ABCO	038	4	41	0	0
NSN0781620	STOCKINETTE 5" N/3	EA	ABCO	038	4	80	0	0
NSV927-3100	CAST BREAKER	EA	MILTEX	047	4	461	0	0
NSV95-5048S	SCISSORS BANDAGE 5 1/2	EA	MILTEX	047	9	73	0	0
STANFORD	STANFORD UNIVERSITY				66	3003	0	0
01	TSH Medical Company				66	3003	0	0
FINAL RESULT					66	3003	0	0

Missing Sales Report



MISSING SALES REPORT

FROM FISCAL PERIOD 1205 FOR 6 PERIODS OF ZERO SALES AND TOTAL SALES OF 12 PERIODS 05/27/12 15:19:50

PRODUCT CODE	DESCRIPTION	U/M	VENDOR	P/C	PREVIOUS 6 PERIODS 1111 TO 016.		LAST 6 PERIODS 1205 TO 1112	
					UNITS	SALES\$	UNITS	SALES\$
580320	GOWN EXAM 30X42 DSP 50/CS	CS	ABCO	058	2	39	0	0
82003	SCOTCHCAST 3" WHITE 10/BX	BX	MMM	038	2	179	0	0
82005	SCOTCHCAST 5" WHITE 10/BX	BX	MMM	038	2	289	0	0
NIPFT102	GLOVES NITRILE P-F SMALL	BX	ABCO	006	2	23	0	0
NIPFT103	GLOVES NITRILE P-F MEDIUM	BX	ABCO	006	2	23	0	0
NIPFT104	GLOVES NITRILE P-F LARGE	BX	ABCO	006	2	23	0	0
NIPFT105	GLOVES NITRILE P-F X LGE	BX	ABCO	006	2	23	0	0
NS11200-1	STEP STOOL	EA	BREWER	048	5	200	0	0
NS5-568	CAST SHEARS 8" ESMARCH	EA	MILTEX	047	4	324	0	0
NS7324	ORTHOFLX 4" J&J	BX	SENECA	038	8	643	0	0
NS7374-1	PLASTER EDGE 4"	BX	SENECA	038	4	166	0	0
NS7376	PLASTE EDGE 6"	BX	SENECA	038	4	230	0	0
NS81120	STOCKINETTE 12"N/8 2RL/CS	CS	ABCO	038	2	164	0	0
NSN0781220	STOCKINETTE 2" N/8	EA	ABCO	038	4	26	0	0
NSN0781320	STOCKINETTE 3" N/8	EA	ABCO	038	4	41	0	0
NSN0781620	STOCKINETTE 5" N/8						0	0
NSV927-3100	CAST BREAKER						0	0
NSV95-5048S	SCISSORS BANDAGE 5						0	0
STANFORD	STANFORD UNIVERSITY						0	0
01	TSH Medical Company						0	0
FINAL RESULT							0	0

We can see products that our customers have bought from us previously and have not done so in the past 6 months. Do you want to know why?

Inactive Customers by Sales Rep



INACTIVE CUSTOMER REPORT AS OF 04/30/12 09:34:24

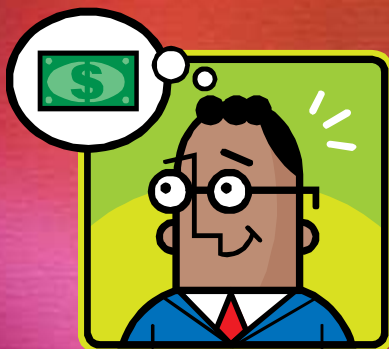
Page 1 of 1

FOR FISCAL PERIOD 04

CUSTOMER # & NAME	LAST ORD DATE	ON MTD	ORDERS YTD	MONTH SALES PCT			YTD SALES PCT			GROSS PROFIT PCT			
				THIS YR	LAST YR	OGE	THIS YR	LAST YR	OGE	THIS YR	LAST YR	PCT OGE	PCT GP
GUDMS GUTTENBURG MUN HOSPITAL	7/4/2011	1	2	0	0	0	44	0	0	17	0	0	38
MERCYCB MERCY CARE BLAIRSFERRY	8/17/2011	18	163	5422	0	0	12699	0	0	2970	0	0	23
MERCYCCP MERCY CARE CENTER POINT	6/14/2011	0	3	68	0	0	68	0	0	16	0	0	23
MERCYOCR MERCY CARE CEDAR RAPIDS	4/25/2012	9	31	0	0	0	0	0	0	0	0	0	0
MERCYCIND MEDICAL ASSOCIATES OF	8/11/2011	6	80	3544	0	0	20422	0	0	4549	0	0	22
MERCYCJA MERCY CARE JOHNSON AVENU	8/11/2011	34	251	2591	0	0	11236	0	0	2957	0	0	26
MERCYCMAR MERCY CARE MARION	7/12/2011	35	264	2045	0	0	11981	0	0	3270	0	0	27
MERCYCSEA MERCY CARE 2ND AVENUE	7/12/2011	10	77	532	0	0	2266	0	0	655	0	0	29
MERCYCVV MERCY CARE VERNON VILLAS	7/10/2011	6	54	1364	0	0	8494	0	0	1962	0	0	23
MERCYFC MERCY FITNESS CENTER	7/6/2011	3	15	108	0	0	746	0	0	173	0	0	23
MTMERCY MT MERCY COLLEGE	11/30/2010	0	1	0	0	0	195	0	0	65	0	0	33
003 LISA FERTIG		122	941	15675	0	0	68152	0	0	16633	0	0	24
01 TSS Medical Company		187	1338	40693	0	0	160366	0	0	46535	0	0	29
FINAL TOTAL		187	1338	40693	0	0	160366	0	0	46535	0	0	29

How can I find out what my customers want?

- MDS can group like customers together.
- If we know what similar customers are buying, this customer should also be buying.
- Direct your sales efforts by using this information .



Associating Customers with a Class

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Customer Master Maintenance Internal # 100639 Created 08/07/08

Customer# SCOTTG

1.Name SCOTT G MEDICAL 21.Special Pricing

2.Address 1 123 MAIN STREET 22.Spec Prc Cont#

3.Address 2 23.Spec Prc Alert

4.Address 3 24.Shipto Code R

5.City DALLAS 25.Ship Method 01 UPS

6.State TX Country 000 U.S.A. 26.Ship Zone

7.Zip Code 07013 8.Res/Comm C 27.Terms Code 01 NET 30

9.DEA Code 28.Taxable N

10.A/R Contact 29.Tax Juris OOS OUT OF STATE

11.Telephone 30.Tax Exempt #

12.Fax Number 31.Exempt Exp Dt

Email 32.Service Chg N # Days 0

13.Master A/R 33.Credit Method 5

14.Cust Class 01 HOSPITALS 34.Credit Limit 40000

15.Cust Type 02 DOCTORS,CLINICS 35.Credit Days 90

16.Cust Group 36.Credit Hold N

17.Abc Co Territory 37.Accept B/O Y

18.Spec Inst 38.Accept Partial Y

19.Purch Cont 39.Accept Subs Y

20.Purch Phone 40.Prc Hld Exempt N

41.Inactive Flag

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT

XXXXXXXX PAGE 1 OF 7

Similar Potential Sales

File Edit Settings Reset Tools GU: Standard Functions Special Functions Help

Targeted Potential Sales Capture:On

1. Company Number All

2. Customer# All

3. Vendor# All

4. Prod Class All

5. Fiscal Period 1111

6. Number of Months (01-36) 6

7. Customer Type Rat

8. Salesman

9. Product#

TYPE	DESC
01	HOSPITALS
02	DOCTORS, CLINICS
03	NURSING HOMES
04	PHARMACY
05	MISC, SCHOOLS, MFG, ETC
06	DENTISTS
07	CHIROPRACTIC
08	VETERINARY

HELP OK/END INSERT LDELETE PREV PG NEXT PG INQUIRY CANCEL Off Popup

Selecting a Specific Sales Rep

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Targeted Potential Sales Capture:On

1. Company Number All

2. Customer# All

3. Vendor# All

4. Prod Class All

5. Fiscal Period 1111

6. Number of Months (01-36) 6

7. Customer Type Rar 01 to 01

8. Salesman

9. Product#

SLM NAME

- 001 SY FERTIG
- 002 DAVID FERTIG
- 003 LISA FERTIG
- 004 INHOUSE SALES
- 005 KEVIN LYNCH
- 006 RETAIL SALES
- 007 GUS VELEZ

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	Popu
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Selecting Specific Products

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Targeted Potential Sales Capture:On

1. Company Number All

2. Customer# All

3. Vendor# All

4. Prod Class All

5. Fiscal Period 1111

6. Number of Months (01-36) 6

7. Customer Type Rai

8. Salesman

9. Product#

Inquiry List

Settings Help

Product Options

All Products

Product Range

Specific Product

END

HELP OK/END INS Off Popu

Products that similar Customers have purchased

```

12:09:56pm 30 May 2012          Targeted Potential Sales Report          Page 1

CUSTOMER#: BMDA                BAHAMAS NATIONAL

Product#           Description1           Description2

001205             MKG ULTRASOUND GEL 8 OZ
001222             MKG ULTRASOUND GEL SLTR
001290             STIRRUP MATES PAIRS
00185              SUCKERS SAFETY POP 100/CT ASSORTED
002-0396-01       SPEEDCLEAN
00200              BULB HALOGEN 3.5V
002002            TOURNIQUET 1X18 250/BOX
00553             ACCUCHEK STRIPS (1191857)
0074-4276-01      LIDOCAINE 1% PL 20ML      1152636
0074-4277-01      LIDOCAINE 2% PL
007868            MKG PAPER THERM 200SHT/PD
007981            MKG CHART PAPER B800
007984            MKG PAPER THERM 200SHT/PD 50 YEAR QUALITY ASSURANCE
007987            MKG PAPER 200/PAD
007989            MKG PAPER THERM 300SHT/PD 50 YEAR QUALITY ASSURANCE
01131             BACITRACIN OINT 10Z
01209             TRIPLE ANITBIOTIC OINTMET 144/BX
012290            INST DETERGENT PWD 4LB/CT ALCONOX LIKE
01500             TOWEL,C-FOLD SURPASS
016659            BULB ONLY FOR SPHYG
01679-200         SURETEMP THERMOMETER
0178              PREG TEST CARDS Q.S. 30/K
0179              PREG TEST CARDS Q.S. 90/K
01804             TOWEL, MULTIFOLD SURPASS
02-5300           GLOVE NS ULTRACARE SM 100 POWDER FREE INNER SURFACE
02-AL             ANKLE STIRRUP AIRCAST LFT
02-AR             ANKLE STIRRUP AIRCAST RT
0205-36           LUBE JELLY SURGILUBE 4OZ 12/BX
0230              BAND AID COVERLET 3/4"
0231              BAND AID COVERLET 1"
02500             BULB FOR HEADLIGHTS
0257              PREG TEST RAPIDVUE 25/KIT
    
```


Prospect/Customer Tracking

- Tracking Sales Efforts through Drill Down
- Assigning prospects and follow-up dates
- Tracking Sales efforts Executive inquiry

Prospect Selection

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Prosp Sls: 001 SY FERTIG Sales Management Prospect Call (Summary)
 Prospect #: _____ To _____ # in list: 3
 Prospect Name: _____
 State Range: _____ To _____ Action: _____
 Zip Code: _____ To _____ List: _____
 Phone Number: _____
 Follow Up Dt: _____ To _____
 Status: _____ Source: _____
 Business: _____ Notes: _____

Ln#	Prospect #	Name	City	St	Stat	Follow Up Date	Time
1.	UMC	UNIVERSITY MEDICAL CENTER	NEW YORK CITY	NY	CUS	06/13/12	12:00
2.	TRINITY	TRINITY MEDICAL CENTER	STATEN ISLAND	NY	PRO	06/21/12	14:00
3.	ABCOFS	ABCO FINANCIAL SERVICES	HILTON HEAD	SC	PRO	07/12/12	13:00
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							

Enter Line# for Detail or S to Change Search Criteria XXXXXX

Pros Look Res #days Search Action List Mds Inc Cust Ord Cust Hist Add Note

Prospect File Detail

Sales Management Call Detail Slsn 001 SY FERTIG Total 6

Prospect# TRINITY TRINITY MEDICAL CENTER Current 4

CitySt STATEN ISLAND NY PROSPECT Business Type 01 HOSPITALS

Contact JOE BUSH Status Code PRO PROSPECT

Title Follow Up Date 06/21/12 14:00

Phone 718-111-1111 Ext Next Step F/U with pricing

E-Mail ELAB@TRINITY.COM

Web Url Source HIDA list

Operator	Date	Time	Notes/Text	Note#	1	of	3
SY	04/26/12	15:19	Larry Will be taking over for Joe over the next 3 weeks. He can be reached at Joe contact number.				
Action	LT	SEND LETTER	05/05/12	He would like a call next week about getting a quote on supplies.			
Customer Specific Area							
available Custom Field							
available Custom Field							
available Custom Field							

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	Mds Inq	Cust Ord	Cust Hist	Quote	Quote Inq	E-Mail	Contacts
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup

Prospect File Detail

Sales Management Call Detail Slsn 001 SY FERTIG Total 6

Prospect# TRINITY TRINITY MEDICAL CENTER Current 4

CitySt STATEN ISLAND NY PROSPECT Business Type 01 HOSPITALS

Contact JOE BUSH Status Code PRO PROSPECT

Title Follow Up Date 06/21/12 14:00

Phone 718-111-1111 Ext Next Step F/U with pricing

E-Mail ELAB@TRINITY.COM

Web Url Source HIDA list

Operator	Date	Time	Notes/Text	Note#	1	of	3
SY	04/26/12	15:19	Larry Will be taking over for Joe over the next 3 weeks. He can be reached at Joe contact number.				
Action	LT	SEND LETTER	05/05/12	He would like a call next week about getting a quote on supplies.			
Customer Specific Area							
available Custom Field							
available Custom Field							
available Custom Field							

The Prospect CRM allows for entry of notes and follow up information

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	Mds Inq	Cust Ord	Cust Hist	Quote	Quote Inq	E-Mail	Contacts
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup

Prospect File Detail

Sales Management Call Detail Slsn 001 SY FERTIG Total 6

Prospect# TRINITY TRINITY MEDICAL CENTER Current 4

CitySt STATEN ISLAND NY PROSPECT Business Type 01 HOSPITALS

Contact JOE BUSH Status Code PRO PROSPECT

Title Follow Up Date 06/21/12 14:00

Phone 718-111-1111 Ext Next Step F/U with pricing

E-Mail ELAB@TRINITY.COM

Web Url Source HIDA list

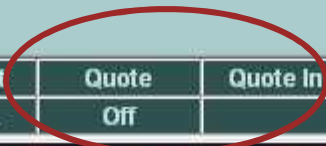
Operator	Date	Time	Notes/Text	Note#	1	of	3
SY	04/26/12	15:19	Larry Will be taking over for Joe over the next 3 weeks. He can be reached at Joe contact number.				
Contact	Larry Hursh						
Action	LT SEND LETTER	05/05/12	He would like a call next week about getting a quote on supplies.				
Customer Specific Area							
available Custom Field							
available Custom Field							
available Custom Field							

Click on a fi XXXXXX PAGE 1 OF 3

Ord Entry	Cust Ord	Cust Hist	Quote	Quote Inq	E-Mail	Contacts
HELP	INQUIRY	CANCEL	OFF			Popup

The Prospect CRM allows for entry of notes and follow up information

By using the function key Quote, a new quote can be generated. To review existing quotes use quote Inq, will bring you to the next screen.



Quote Inquiry

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Customer		Sales	Quotes	
Customer	SCOTT		Phone#	01
Company	A		Contact	
Name	DKJFDK		Salesman	
Address 1	1033 Route 46		Credit Limit	
Address 2			Credit Hold	N
City	CLIFTON NY 11111		ALC Priority	

1.Line	Quote#	Cust Ref	OrdDt	Whs	ST	F	DS	OP	Order\$
1	01A00086		06/04	001	OP	N	ND	SO	630.00
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									

Enter END to exit, NEXT PG,PREV PG,or Line Number for Detailed QUOTE

XXXXXX

Executive Inquiry Track Sales Calls

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Executive Inquiry - Salesman Calls

As of Date

05/09/12

Co# 01 TSH Medical Company

#	Salesman	Number of Calls			# of Initial Calls		
		Daily	MTD	YTD	Daily	MTD	YTD
1	001 SY FERTIG	1	4	4	0	3	3
2	002 DAVID FERTIG	0	1	1	0	1	1
3	003 LISA FERTIG	0	1	1	0	1	1
4	004 INHOUSE SALES	0	0	0	0	0	0
5	005 KEVIN LYNCH	0	0	0	0	0	0
6	006 RETAIL SALES	0	0	0	0	0	0
7	007 GUS VELEZ	0	0	0	0	0	0
8							
9							
10							
11							
12							
13							
14							

Totals

1

6

6

0

5

5

Enter END to Exit

XXXXXX

Executive Inquiry Sales by Rep

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Executive Inquiry - Salesman Summary
As of Fiscal Period Ending

1205

Co# 01 TSH Medical Company

Salesman	Month to Date			Year to Date		
	Sales	Profit	GP%	Sales	Profit	GP%
001 SY FERTIG	34665.70	13917.53	40.15	265011.21	104407.08	39.40
002 DAVID FERTIG	53294.59	22870.00	42.91	433046.50	200000.00	46.18
003 LISA FERTIG	68268.71	20005.14	29.30	530184.30	220005.14	41.50
004 INHOUSE SALES	-26187161.29	-7875272.10	30.07	-25910105.91	-7875272.10	30.39
005 KEVIN LYNCH	12776.74	6054.22	47.38	158774.65	60876.55	38.34
006 RETAIL SALES	3750.84	1489.80	39.72	49085.73	20562.05	41.89
007 GUS VELEZ	37.64	15.00	39.85	37.64	15.00	39.85
	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00	0.00	0.00

Totals -26014367.07 -7810920.41 30.03 -24473965.88 -7269406.28 29.70

Enter END to Exit XXXXXX

HELP	OK/END	INSERT	Print Sum	Day/Month	Calls					
			LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off		Popup

Email Blasting

- How to create a Blast
- Creating Contact List
- Adding notes to all contacts
- Setting Follow-up Dates

Creating a List

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Prospect Sls: 001 Salesman-001 Sales Management Prospect Call (Summary)

Prospect #: [] To [] # in list: 11

Prospect Name: []

State Range: [] To [] Action: []

Zip Code: [] To [] List: []

Phone Number: []

Follow Up Dt: [] To []

Status: [] Source: []

Business: [] Notes: []

Ln#	Prospect #	Name	City	St	Stat	Follow Up Date	Time
1.	RICH	John Smith Inc.	MONORE	NY	ABC		
2.	KESSLER	KESSLER	EAST ORANGE	NJ	OPN		
3.	TJZNEW2	New York Giants	CITY	NJ	ABC		
4.	BENJI5	The New York Yankees	CLIFTON	NJ	OPN		
5.	BENJI4	The Simpson Group	CLIFTON	NJ			
6.	ME1	The Systems Group	F	NY			
7.	TJZNEW	Tom Harris Inc.	1	NJ	55		
8.	BENJI3	BENJI Medical Inc.	CLIFTON	NJ	OPN	01/29/07	
9.	BENJI1	Lodus Medical Supply	CLIFTON	NJ	OPN	03/08/07	14:30
10.	europa	Europa Crystal Sculptures	St Paul	MN	OPN	07/30/07	
11.	TRTEST	ABC COMPANY INC	CLIFTON	NJ	55	09/11/07	

Enter Save List Name: June Blast

Pros Look	Res #days	Search	Action	Get List	Mds Inq	Cust Ord	Cust Hist	Add Note	Save List	
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	OFF		Popup

Help in Creating Email

The screenshot shows a software application window with a menu bar (File, Edit, Settings, Reset, Tools, GUI, Standard Functions, Special Functions, Help) and a main workspace. A 'GENERAL HELP' dialog box is open, displaying the following text:

You will need to have an email template in the form.archive,blast folder prior to sending your emails.
The following keywords are replaced in the email body:
[TITLE] = Prospects Contact Title
[COMPANY] = Company/Prospect Name
[CITY.S2] = Prospect City/State/Zip
[ADDRESS] = Prospect Address Line 1
[FNAME] = Prospect First Name
[CUST.NAME] = Prospect Contact Name
[EMAIL.ADDR] = Prospect Contact Email Address
Please note:
Each contact in the prospect record will receive a separate email

The dialog box has 'End Help' and 'Inquiry' buttons. The main workspace contains a numbered list of steps:

1. Enter Html F
2. Enter Text F
3. Enter Attach
4. Enter Attach
5. Enter Prospe
6. Enter List of Prospects or 'ALL'
7. Enter Email Subject
8. Enter Sender Address
9. Enter Sender Name

Below the list are three input fields corresponding to steps 7, 8, and 9. At the bottom, there is a prompt: 'ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT' followed by a text box containing 'XXXXXX'. A red circle highlights the 'HELP' button in the bottom navigation bar.

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	Popu
------	--------	--------	---------	---------	---------	---------	--------	-----	------

Information for body of blast

[COMPANY]
[FNAME]
[CUST.NAME]

Please Note: Please find the June special attached for your supply needs.

Save the document as an HTML document

Template to Fill Contact Information from Prospect File

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Send Prospect Emails

1. Enter Html File Name
2. Enter Text File Name
3. Enter Attachment #1
4. Enter Attachment #2
5. Enter Prospect Code
6. Enter List of Prospects or 'ALL'
7. Enter Email Subject
8. Enter Sender Address
9. Enter

juli!55011!16202!BLAST.TEMPL!TOMBLAST.htm

File Name

- sostro!59764!16202!BLAST.TEMPL!flyer.xml
- tomz!30418!16203!BLAST.TEMPL!TEST3.HTML
- tomz!30432!16203!BLAST.TEMPL!PROSPECT.txt
- tomz!30512!16203!BLAST.TEMPL!PROSPECTweb.htm
- tomz!30523!16203!BLAST.TEMPL!PROSPECT.txt
- tomz!30546!16203!BLAST.TEMPL!CRS117416.docx
- tomz!30552!16202!BLAST.TEMPL!TZQP4.txt
- tomz!34449!16203!BLAST.TEMPL!SRTEST.jpg
- tomz!37751!16202!BLAST.TEMPL!TZQP.txt
- tomz!47915!16202!BLAST.TEMPL!TZUPLOAD.txt
- tomz!49763!16202!BLAST.TEMPL!csc.whse.txt
- tomz!49819!16202!BLAST.TEMPL!lstext.txt

Contextual Help

Choose a template by clicking on the inquiry button or choose OK/END and then click on the camera icon to upload a new template.

Acquiring Attachment

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Send Prospect Emails

- 1. Enter Html File Name
- 2. Enter Text File Name
- 3. Enter Attachment #1
- 4. Enter Attachment #2

tomz!30512!16203!BLAST.TEMPL!PROSPECTweb.htm
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
[Inquiry Icon] [Camera Icon]

5. Enter Prospect Code

[Empty Input Field]

6. Enter List of Prospects or 'ALL'

[Empty Input Field]

7. Enter Email Subject

8. Enter Sender Address

[Empty Input Field]

9. Enter

Contextual Help
Choose a template by clicking on the inquiry button or choose OK/END and then click on the camera icon to upload a new template.

Choose Source:
Acquire Image from Scanner or Capture Device
Load a File or Image from a Folder
[OK] [Cancel]

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	OFF			Popup
------	--------	--------	---------	---------	---------	---------	--------	-----	--	--	-------

Acquiring Attachment

The screenshot shows a software application window with a menu bar (File, Edit, Settings, Reset, Tools, GUI, Standard Functions, Special Functions, Help) and a toolbar (Send, Prospect, Emails). The main area contains a form with several input fields and a list of files. A file selection dialog box is open, showing the 'Reports' folder containing numerous PDF files. A red circle highlights a small icon in the bottom right corner of the form area.

1. Enter Html File Name
2. Enter Font Selection
3. Enter
4. Enter
5. Enter
6. Enter
7. Enter
8. Enter
9. Enter

Look in: Reports

0529.pdf	011408.pdf	020711r.pdf
0529.rpt	011909.pdf	020712.pdf
0601.pdf	012108.pdf	020810.pdf
010111.pdf	012411.pdf	021109.pdf
010410.pdf	012510.pdf	021308.pdf
010509.pdf	012709.pdf	021411.pdf
010611.pdf	012808.pdf	021709.pdf
010611p.pdf	012909.pdf	021810.pdf
010708.pdf	013111.pdf	021908.pdf
011110.pdf	020110.pdf	022211.pdf
011209.pdf	020508.pdf	022309.pdf
011311.pdf	020509.pdf	022508.pdf
011311r.pdf	020711.pdf	022811.pdf

File name:
Files of type:
 Open as read-only

Open Cancel

eb.htm
XXXXXXXXXXXXXXXXXXXX

HELP OK/END INSERT LDELETE PREV PG NEXT PG INQUIRY CANCEL Off Popu

Acquiring Attachment

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Send Prospect Emails

1. Enter Html File Name

2. Enter Font Selection

3. Enter

4. Enter

5. Enter

6. Enter

7. Enter

8. Enter

9. Enter

Font Selection

Look in: Reports

- 0529.pdf
- 0529.rpt
- 0601.pdf
- 010111.pdf
- 010410.pdf
- 010509.pdf
- 010611.pdf
- 010611p.pdf
- 010708.pdf
- 011110.pdf
- 011209.pdf
- 011311.pdf
- 011311r.pdf
- 011408.pdf
- 011909.pdf
- 012108.pdf
- 012411.pdf
- 012510.pdf
- 012709.pdf
- 012808.pdf
- 012909.pdf
- 013111.pdf
- 020110.pdf
- 020508.pdf
- 020509.pdf
- 020711.pdf

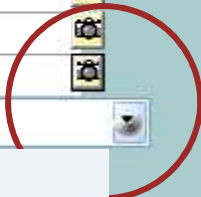
File name:

Files of type:

Open as read-only

eb.htm

XXXXXXXXXXXXXXXXXXXX



HELP OK/END INSERT LDELETE PREV PG NEXT PG INQUIRY CANCEL Off Popu

Complete Blast to Send

File Edit Settings Reset Tools GU: Standard Functions Special Functions Help

Send Prospect Emails

1. Enter Html File Name tomz!30377!16221!BLAST.TEMPL!TEST3.HTML

2. Enter Text File Name

3. Enter Attachment #1 Ansell_EncoreMicroOpticSFT_high.JPG

4. Enter Attachment #2

5. Enter Prospect Code

6. Enter List of Prospects or 'ALL' SCOTT

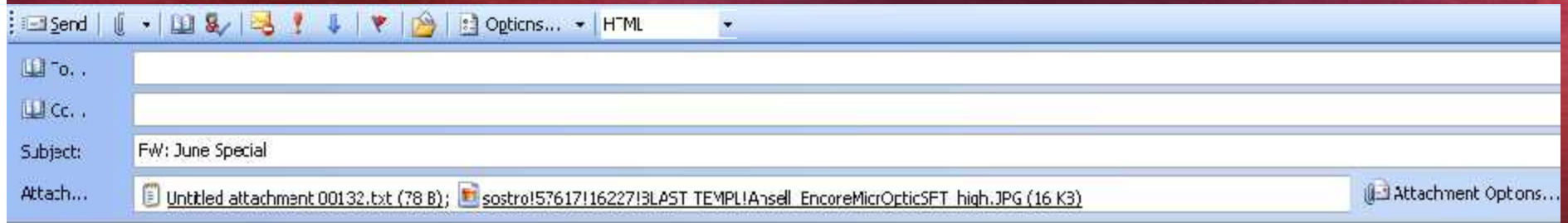
7. Enter Email Subject Monthly Special

8. Enter Sender Address sostro@tshinc.com

9. Enter Sender Name Scott Ostro

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off		Popup
------	--------	--------	---------	---------	---------	---------	--------	-----	--	-------

Blast E-mail Example



From: Scott Ostro [mailto:sostro@tsh]
Sent: Monday, June 04, 2012 4:03 PM
To: JULI@TSHINC.COM
Subject: June Special

The Systems House
TOM SMITH

Please Note: Please find the June special attached for your supply needs.

This email has been scanned by the Outbound TSH Mail Filter:
Please Report any issues to support@tshinc.com

This email has been scanned by the Inbound TSE Mail Filter:
Please Report any issues to support@tshinc.com

Adding a note to all selected Prospects

File Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Prospect Sls: 001 Salesman:001 Sales Management Prospect Call (Summary)

Prospect #: [] To [] # in list: 11

Prospect Name: []

State Range: [] To [] Action: []

Zip Code: [] To [] List: []

Phone Number: []

Follow Up Dt: [] To []

Status: [] Source: []

Business: [] Notes: []

Ln#	Prospect #	Name	City	St	Stat	Follow Up Date	Time
1.	RICH	John Smith Inc.	MONROE	NY	ABC		
2.	KESSLER	KESSLER	EAST ORANGE	NJ	OPN		
3.	TJZNEW2	New York Giants	CITY	NJ	ABC		
4.	BENJI5	The New York Yankees	CLIFTON	NJ	OPN		
5.	BENJI4	The Simpson Group	CLIFTON	NJ			
6.	MF1	The Systems Group		NY			
7.	TJZNEW	Tom Harris Inc.		NJ	55		
8.	BENJI3	BENJI Medical Inc.	CLIFTON	NJ	OPN	01/29/07	
9.	BENJI1	Lodus Medical Supply	CLIFTON	NJ	OPN	03/08/07	14:30
10.	europa	Europa Crystal Sculptures	St Paul	MI	OPN	07/30/07	
11.	TRTFST	ABC COMPANY INC	CLIFTON	NJ	55	09/11/07	

Enter Note: June Blast

Pros Look	Res #days	Search	Action	Get List	Mds Inq	Cust Ord	Cust Hist	Add Note	Save List	
HELP	OK/END	INSERT	DELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off		Popup

Thank You

Questions and Answers?

