

Welcome to Your Dashboard

User Group Meeting 2013

Introduction



- Dashboard Features
- Products
- Customers
- Vendors
- Quick Find Menu/Search
- Shortcuts
- Popups
- Key Performance Indicators
- Tasks

Dashboard Features



The MDS Product, Customer and Vendor Lookups are on infotabs, and available at any time.

The screenshot shows the MDS software interface. On the left is a menu with 12 items: 1. Customer Service, 2. Purchasing, 3. Warehouse Management & Inventory, 4. Sales Analysis, 5. Sub-Management Menu, 6. Accounting Menu, 7. File Maintenance, 8. Fiscal Period Processing, 9. Utility Menu, 10. Customer Special Programs, 11. Optimal Systems, and 12. Quick Search. The main area displays a pie chart titled 'Annual Sales by Customer Class Description' with a legend: DOCTORS, CLINICS (30.3%), HOSPITALS (41%), MISC SCHOOLS & MDG, ETC (28.7%), and NURSING HOMES (1.1%). On the right, a vertical infotab menu is circled in green, containing 'Product Lookup', 'Customer Lookup', 'Vendor Lookup', and 'Supplier Lookup'. The bottom of the screen features a toolbar with icons for 'Go', 'Contacts', 'Mail', 'Drill', 'Forecast', 'Reports', 'Capital', 'View', 'Creation', 'Maintenance', 'Help', 'Ok/End', 'Insert', 'Delete', 'Prev', 'Next', 'Inquiry', 'Cancel', 'Off', and 'Pop-up'.

Product Lookup



tsiipe2.tsiinc.com-DE/3.12-AMIN.MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

MDS Menu Find

Product Lookup: 12:30:14 Customer

Product	Vendor	File	Description	NDC	Card	Price	Unit	Quantity	Order	Order	Order
001205			ERG ULTRA SOUND GEL 8 OZ			39			53	ABCO	BA
001222			LKG ULTRA SOUND GEL 5L R			17			3	ABCO	LA
001380			STERIP MATS PAIRS			75			75	PRF	DR
00135									25	LOCAL	BX
00200									1	AUCU	LA
00500									1	ABCO	BX
002-03									15	MIDMAD	EA
0063									9	TCPHARM	VL
0071-4									30	TCPHARM	VI
0074-4									63	TCPHARM	EA
007301									19	AUCU	PK
007381									3	ABCO	FA
007384									11	ABCO	PK
007901									19	ABCO	PK
007382									19	ABCO	EA
04124			BACITRACIN OINT 10Z			29			29	ABCO	EA
04208			TRIPLE ANTIBIOTIC OINT ML	544 BX		2			2	AUCU	UK
045796			INST DFTROFMT PWD 41 RCT	41 COMOR LINE		3			3	ABCO	FA
04590			TOWEL-C-FOLD SURPASS			10			10	BAKER	CS
046268			TUQU ONLY TUR SHIVE			12			9	AUCU	LA
04679-905			SURTEMP THERMOMETER			3			3	WIFI CH	FA
0470			PREG TEST CARDS Q.S. 300K			154			164	ABCO	DK
0479			PHLS TLSE CARDS Q.S. 900K			2			2	AUCU	UK
04834			TOWEL - MINI TIFON 1 SURPASS			19			19	BAKER	CS

Product Lookup: 12:30:14 Customer

Customer

Vendor

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off Pepup

Drill Faxing Reports Copy Off View Continue Ventilation

01

The Product Lookup's last refresh time shows on the infotab.



Product Lookup with Pricing



tsiipe2.tshinc.com-DE/3.12-MIN-MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

MDS Menu Find

Product Lookup: 12:00:14 Customer Customer Vendor

Product Lookup: 12:00:14 Customer Customer Vendor

Product: Vendor: File: Description: NDC: Card: ABCD Price:

Product	Description	NDC	Qty	Price	Unit
001205	ERG ULTRA SOUND GEL 8 OZ		30		EA
001223			17		EA
001398			75		DR
00135			25		BOX
00200			1		EA
00500			1		BOX
002-03			15		EA
0063			9		VL
0071-4			30		VI
0074-4			63		EA
007301			19		PK
007381			3		EA
007384			11		PK
007901			10		PK
007382			10		PK
04124			20		EA
04208	TRIPLE POINT OPTIC OBJECTIVE	5900X	2		UN
045796	INST DEFECT DET PWD 41 RCT	41 COMOR LINE	3		EA
04500	TOWEL-C-FOLD SURPASS		10		CS
046268	TOILET ONLY TUB SPRING		12		EA
04679-005	SUBTEMP THERMOMETER		3		EA
0470	PREG TEST CARDS Q.S. 300K		154		DK
0479	PHLS TLSE CARDS Q.S. 900K		2		UN
04834	TOWEL, MINI TIFON D SURPASS		10		CS

Home

1. Customer Service

2. Purchasing

3. Warehouse Management & Tr

4. Sub Analysis

5. Sales Management Menu

6. Accounting Menu

7. HR Management

8. End of Period Processing

9. Utility Menu

10. Customer Special Programs

11. Optional Systems

12. Quick Search

Go Contacts Print Drill Faxing Reports Copy DB View Comments View menu Help Ok/End Insert Delete Prev Next Inquiry Cancel Off Pepup

To display the customer's pricing just input the customer, check the price box and refresh the data.

Product Lookup with Pricing



tshtpe2.tshinc.com-DEMO-12-MIN-MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

MDS Menu
MDS Menu Find

Product Vendor Title Description NDC Cast Price

TOCUTS Sales History

1.Customer Service
2.Purchasing

6.Accounting Menu
7.Facil Maintenance
8.Facil Period Processing
9.Utility Menu
10.Customer Special Programs
11.Optimal Systems
12.Quick Search

Name	Description	Description 2	NDC	Qty	Unit	Price	Avail	Custom	Service	St
001205	CKS ULTRA SOUND GEL 8 OZ			3	150 CAH N	3.150	39	63	ABCO	CA
001206	CKS ULTRA SOUND GEL 16 OZ			25	788 PCH N	25.788	16	8	ABCO	FA
004200	STERIOD MATES PAIRS			1	150 PCH N	1.150	75	75	FEE	PR
				14	950 BXH N	14.950	20	20	LOCAL	UK
				1	380 PCH N	11.380	1	1	ABCO	FA
				30	050 BXH N	30.050	4	4	ABCO	BK
				0	800 LWH N	0.800	13	16	MILMARR	LA
				40	550 VLIH N	40.550	-44	6	TOPHARM	VI
				30	700 VLIH N	1.700	30	30	TOPHARM	VL
				0	200 CAH N	1.200	85	88	TOPHARM	CA
				10	500 PCH N	24.500	10	10	ABCO	PK
				0	000 CAH N	31.000	0	6	ABCO	CA
				11	700 PCH N	27.700	11	11	ABCO	PK
				11	000 PCH N	34.050	11	11	ABCO	PK
				10	900 PCH N	26.900	10	10	ABCO	PK
				20	150 PCH N	1.350	20	20	ABCO	FA
				2	050 BXH N	11.050	2	2	ABCO	BK
				0	000 LWH N	11.000	0	0	ABCO	LA
				10	150 CSH N	77.150	10	10	PARFE	CS
				12	000 CAH N	5.950	12	6	ABCO	CA
				0	000 PCH N	206.000	0	0	WPHICH	FA
				104	500 BXH N	120.500	104	104	ABCO	BK
				2	000 BXH N	263.000	2	2	ABCO	UK
				10	000 CSH N	60.850	10	10	PARFE	CS

Product Lookup: 12:34:41 - Customer MenuView
Customer: 000001 - 03/20/2014
Vendor Lookup: 12:34:41

Ok Contacts Mail Drill Fencing Reports Capital View Customers Maintenance
Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

The customer's price is now showing.

Sales History



tsipe2.tshinc.com-DE/3-12-MIN-MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Product Lookup: 3-877-333-4444 Line: 000000

Product Name: Vendor: Title: Description: NDC: Cost: MARCOV? Price:

Sales History

Name	Description	Description?	Price	Unit	Unit Price	Total	Total Cost	Level
71925	FINGER SPLINT PD PADDED	12PKGS	0.00	0113627001	1	139.40	96.51	F
01977	FINGER SPLINT PD PADDED	12PKGS	0.00	01138498005	12	14.20	7.38	F
42NTB	SPOT MONITOR BP,PO2,THERM		0.00	0144034001	1	16,210.00	10,536.50	E
14LKWJG	WILLIAMS HAIR MIDDLE 1 JULL	ADULT 1009560	0.00	0113913001	1	-2,490.00	-1,951.50	L
SR13 1	SHARPS CONT 2605		0.00	0110665001	6	80.70	36.18	F
5600	-75.50	-49.08	E
						126.00 LA	166.00 LA	L
						125.00 FA	100.00 FA	F
						250.00	227.50	F
						320.00	211.20	E
						540.00	546.00	F
						49.50	32.10	F
						26.00	18.51	F
						-18.50	-12.03	E
						18.00	12.91	L
71618	FINGER SPLINT PD 5M 4 1/2"		0.00	0115829401	6	13.80	8.84	F
71605	FINGER SPLINT PD MED 2 1/4"		0.00	0114970501	6	13.50	8.84	E
0XY 16	Oxydione tabs	Howcodone tabs	0.00	0111102001	0	589.00 UI	262.00 UI	L
71607	FINGER SPLINT 1 1/2 31" PD		0.00	0113925401	1	13.80	8.84	F
5V23DLK	VICIB INT SET 23034 12"		0.00	01140014001	100	-12.00	-7.00	D
019425	SYM E 600 1000 DYS 102 100		0.00	01111694001	1	208.80	168.66	F
134163	DEPO MEPROL 80MG 500		0.00	0144313001	2	427.00	0.00	F
75-017	PUMPLR TABLL 5PC/BLY COLOR	75LP SLL UNMARTOR COST	0.00	0113917001	1	70,000.00	50,700.00	L
105026	GALIFE RAINDAF 21" US 15PG		0.00	0115821801	1	68.00	38.56	F

Product Lookup: 3-877-333-4444 Customer Navigation Customers Select

Go Contacts Mail Drill Faxing Reports Capital Call View Create Maintenance

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off Pepp

The Sales History tab will display past sales information for the customer.

Customer Lookup



tsiipe2.tshinc.com-DE/3-12-AM/IN.MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

MDS Menu Find

1.Customer Service
2.Purchasing
3.Warehouse Management & Inventory
4.Sales Analysis
5.Subs Management Menu
6.Accounting Menu
7.File Maintenance
8.Fact of Period Processing
9.Utility Menu
10.Customer Special Programs
11.Optimal Systems
12.Quick Search

Date Time Description Status D... C... Task Na...

10/15/2013	01:00 pm	Sales Meeting	Sales ...	0000261
10/16/2013	10:30 am	Management Meeting	Mana...	0000265
10/17/2013	08:30 am	User Group Meeting	User G...	0000266

The last refresh time shows on the infotab for the Customer Lookup.

Legend

- DOCTORS, CLINICS
- HOSPITALS
- MISC. SCHOOLS & MFG, ETC
- NURSING HOMES

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Customer Lookup



tsiipe2.tsihiic.com-DE/0.12-WIN.MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

MDS Menu
MDS Menu Find

Customer

Customer	Name	Address	City	ST	Zip	Phone
MERCYCSA	MERCY CARE 2ND AVENUE SF	1444 2ND AVENUE SF	CEDAR RAPIDS	IA	52403	319-363-2100
MERCYCSA	MERCY CARE JOHNSON AVENUE	75 SHORT STIRLLI HWY	CEDAR RAPIDS	IA	52405	319-295-0310
MERCYCSA	MERCY CARE VERNON BLVD WAGE	3855 ELY VERNON BLVD WAGE	CEDAR RAPIDS	IA	52403	319-363-2100
MERCYFC	MERCY FITNESS CENTER	3701 1ST AVENUE SE	CEDAR RAPIDS	IA	52402	319-365-3265
MERCYCOLL	MERCY COLLEGE	100 MCCAULLY	CEDAR RAPIDS	IA	52402	
MERCYHOSP	MERCY CARE CEDAR RAPIDS	441 10TH STREET SE 42500	CEDAR RAPIDS	IA	52403	

Product Lookup: Active - Customer Maintenance
Customer Lookup: Customer Lookup
Verifiers

Go Contacts Mail Drill Facsimile Reports Capital Call View Create Maintenance

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

The search filters are available to easily find the customer you are looking for by narrowing your results.

Customer Lookup



tsiipe2.tshinc.com-DE/3.12-MAIN.MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Customer Lookup: 3/23/2011

Customer	Name	Address1	City	CDR	ST	Zip	Phone
MERCYFC	MERCY FITNESS CENTER	3701 457 AVENUE SE	CEDAR RAPIDS	IA	52402	319-265-3765	
MIMLCY	MT MERCY COLLEGE	100 MCCOULLY	CEDAR RAPIDS	IA	52402		
MERCYCA	MERCY CARE 300 AVENUE	3001 2ND AVENUE SE	CEDAR RAPIDS	IA	52402	319-265-3499	
MERCYCV	MERCY CARE VERNON VILLAGE	3933 MT VERNON RD SE	CEDAR RAPIDS	IA	52403	319-263-8148	
MERCYCD	MERCY CARE CEDAR RAPIDS	151 10TH STREET SE	CEDAR RAPIDS	IA	52403		
MERCYCA	MERCY CARE JOHNSON AVENUE	75 SHORT STREET NW	CEDAR RAPIDS	IA	52405	319-265-6345	

1. Customer Service
2. Purchasing
3. Warehouse Management & I/O
4. Sales Analysis
5. Sales Management Menu
6. Accounting Menu
7. File Maintenance
8. Fiscal Period Processing
9. Utility Menu
10. Customer Special Programs
11. Optimal Systems
12. Quick Search

Contacts Mail Drill Filing Reports Capital O/I View Creation Maintenance

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Product Lookup: Active - Customer Maintenance
Customer - Search - CONTACTS
SEARCH

You can also click on any of the column headings for easy sorting of the data.

Customer Lookup



tsiipe2.tshinc.com-DE/3.12-MAIN.MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Customer Lookup: 3/23/2011

Customer	Name	Address1	City	CDR	ST	Zip	Phone
MERCYFC	MERCY FITNESS CENTER	3701 457 AVENUE SE	CEDAR RAPIDS	IA		52407	319-365-3765
MIMLCY	MT MERCY COLLEGE	100 MCCOULLY	CEDAR RAPIDS	IA		52402	
MERCYCA	MERCY CARE 300 AVENUE	1041 2ND AVENUE SE	CEDAR RAPIDS	IA		52403	319-363-3499
MERCYVV	MERCY CARE VERNON VILLAGE	3933 MT VERNON RD SE	CEDAR RAPIDS	IA		52403	319-363-8148
MERCYCR	MERCY CARE CEDAR RAPIDS	151 10TH STREET SE #200	CEDAR RAPIDS	IA		52403	
MERCYCA	MERCY CARE JOHNSON AVENUE	75 SHORT STREET NW	CEDAR RAPIDS	IA		52405	319-399-6345

In this example the data is being sorted ascending by the Zip code. To change the sort to descending, just click on the column once more.

On Contacts Mail Drill Faxing Reports Capital View Create Mail Merge Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Vendor Lookup



The screenshot displays the MDS Menu software interface. The main window is titled "Vendor Lookup" and shows a table with the following data:

Date	Time	Description	Status	D...	C...	Task Na...
10/15/2013	01:00 pm	Sales Meeting	Sales ...			0000261
10/16/2013	10:30 am	Management Meeting	Mana...			0000265
10/17/2013	08:30 am	Board Group Meeting	Board...			0000266

Below the table is a pie chart showing the distribution of vendors by category:

- DOCTORS, CLINICS (Red)
- HOSPITALS (Green)
- MISC. SCHOOLS & MFG, ETC. (Purple)
- NURSING HOMES (Orange)

The pie chart shows 31% for DOCTORS, CLINICS and 11% for HOSPITALS. A green arrow points to the "Refresh" button in the top right corner of the table area.

At the bottom of the interface, there is a toolbar with various icons for navigation and actions, including "Help", "Ok/End", "Insert", "Delete", "Prev", "Next", "Inquiry", "Cancel", "Off", and "PopUp".

Similar to the Product and Customer Lookup's, the Vendor Lookup's last refresh time shows on the infotab.

Vendor Lookup



tshpe2.tshinc.com-DE/3-12-AM/11/MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Vendor Lookup: 3/28/11 11:41

Vendor	Name	Address1	City	ST	Zip	Phone
ANSFI	ANSFI PERRY	PO BOX 2500	CA701	STREAN	II 50132-7500	800-852-0945

1. Customer Service
2. Purchasing
3. Warehouse Management & U
4. Sales Analysis
5. Sales Management Menu
6. Accounting Menu
7. File Maintenance
8. Fiscal Period Processing
9. Utility Menu
10. Customer Special Programs
11. Optimal Systems
12. Quick Search

Product Lookup: 3/28/11 11:41 AM
Customer Lookup: 3/28/11 11:41 AM
Vendor Lookup: 3/28/11 11:41 AM

Go Contacts Mail Drill Forecast Reports Capital Exp View Creation Maintenance
Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

The search filter's can be used to quickly find information. In this example, the vendor's partial phone number was retrieved.

Create a Shortcut



tsihs2.tshinc.com-DE/3-12-TEL.MARKET.MAINT11

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

MDS Menu

MDS Menu Find

Date	Time	Description	Status	D...	C...	Task: Na...
10/15/2013	01:00 pm	Sales Meeting	Sales ...			0000261
10/16/2013	10:30 am	Management Meeting	Mana...			0000265

1.Prospect Call Selection
2.Prospect Call Maintenance
3.Sales Management Custom Field
4.Task List Selection
5.Task Maintenance
6.Normonized/Recurring Orders
7.Specials/Template Creation from
8.Copy Specials/Template from Quote/Order
9.Specials/Template Maintenance
10.Monthly Specials Crystal Report
11.Customer Order from Sales History
12.Prospect Blast Email
13.CRM File Maintenance Menu
14.ARM Reporting Menu
15.Missing Sales Crystal Report
16.Missing Sales Report

Access menu items quickly by adding them to your Shortcut list.

Charts | Key Indicators

Chart One Chart Two

Annual Sales by Customer Class Description

Customer Class Description	Percentage
DOCTORS, CLINICS	30.3%
HOSPITALS	28.7%
MISC. SCHOOLS & MFG, ETC.	3.1%
NURSING HOMES	37.9%

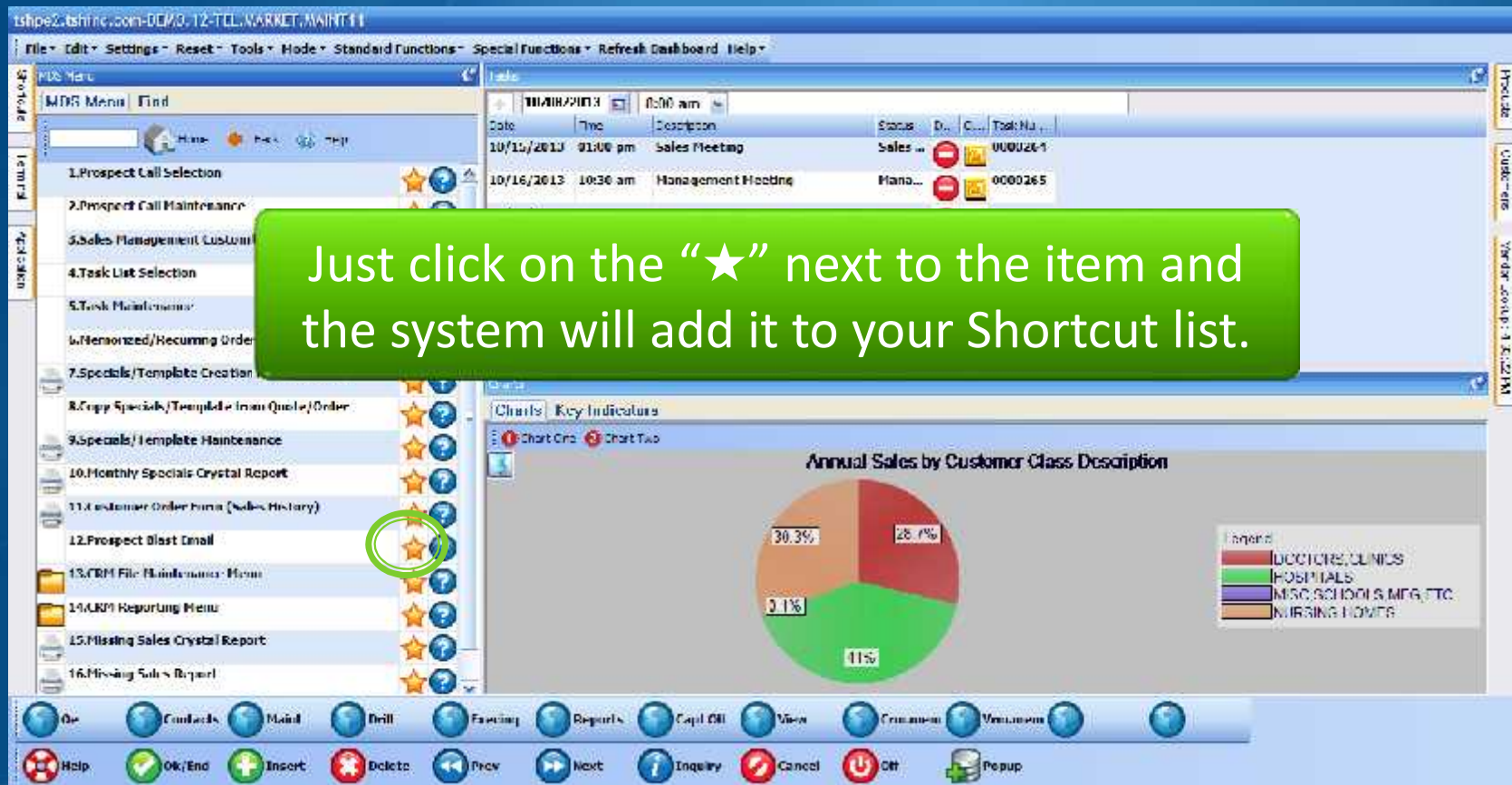
Legend

- DOCTORS, CLINICS
- HOSPITALS
- MISC. SCHOOLS & MFG, ETC.
- NURSING HOMES

Go Contacts Mail Drill Forecast Reports Capital Exp View Commission Measurement

Help OK/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Create a Shortcut



Just click on the “★” next to the item and the system will add it to your Shortcut list.

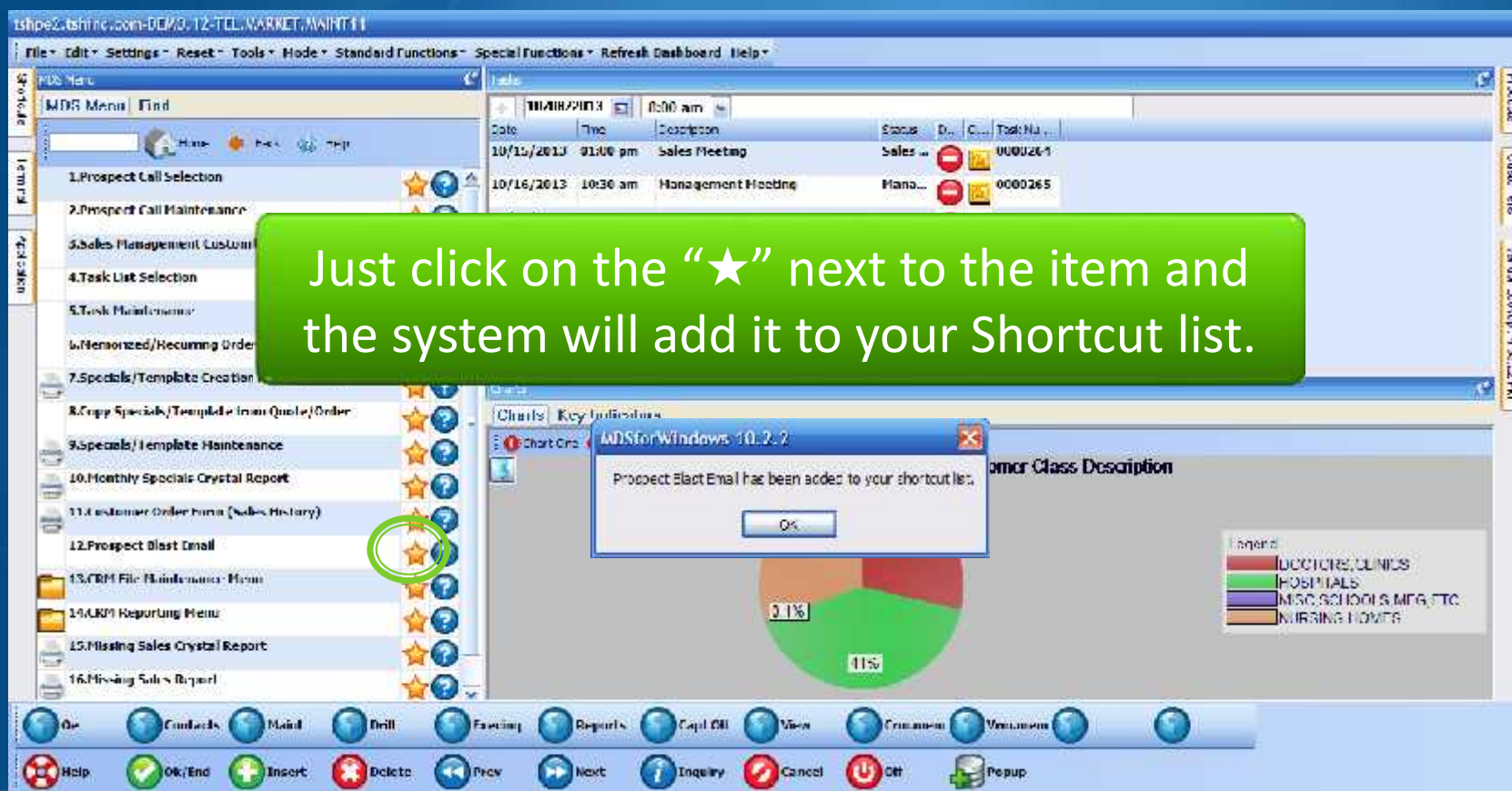
The screenshot shows the MDS Menu interface with a list of 16 items. A green circle highlights the star icon next to item 12, 'Prospect Blast Email'. The interface also includes a table of sales data, a pie chart titled 'Annual Sales by Customer Class Description', and a bottom toolbar with various navigation and action buttons.

Date	Time	Description	Status	D...	C...	Task: Na...
10/15/2013	01:00 pm	Sales Meeting	Sales ...			0000261
10/16/2013	10:30 am	Management Meeting	Mana...			0000265

Annual Sales by Customer Class Description

Customer Class Description	Percentage
DOCTORS, CLINICS	28.7%
HOSPITALS	31.1%
MISC. SCHOOLS & MFG, ETC.	30.3%
NURSING HOMES	11%

Create a Shortcut



Just click on the “★” next to the item and the system will add it to your Shortcut list.

Date	Time	Description	Status	D...	C...	Task: Na...
10/15/2013	01:00 pm	Sales Meeting	Sales ...			0000261
10/16/2013	10:30 am	Management Meeting	Mana...			0000265

Customer Class Description Legend:

- DOCTORS, CLINICS
- HOSPITALS
- MISC. SCHOOLS & MFG, ETC.
- NURSING HOMES

Shortcuts Infotab



Click on the Shortcuts infotab to access your list of shortcuts.

Date	Time	Description	Status	D...	C...	Total Na...
10/15/2013	01:00 pm	Sales Meeting	Sales			0000261
10/16/2013	10:30 am	Management Meeting	Mana...			0000265
10/17/2013	08:30 am	User Group Meeting	User G...			0000266

Annual Sales by Customer Class Description

Customer Class Description	Percentage
DOCTORS, CLINICS	30.3%
HOSPITALS	28.7%
MISC. SCHOOLS & MFG, ETC.	31.1%
NURSING HOMES	11%

Shortcuts Infotab



tsihs2.tsihs.com-DE/3-12-WIN.MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Shortcuts

- Podiatric Menu
- Plastics Menu
- Operator Dashboard Maintenance
- Prospect Blast Email
- Invoice Request Inquiry
- Manifest System

Info

Date	Time	Description	Status	D...	C...	Task Na...
10/15/2013	01:00 pm	Sales Meeting	Sales ...			0000261
10/16/2013	10:30 am	Management Meeting	Mana...			0000265
10/17/2013	08:30 am	User Group Meeting	User G...			0000266

Include Vendor Group: 3-EX-21M

Use the buttons to the right to rearrange the list, or remove any of the items.

DOCTORS, CLINICS
HOSPITALS
MISC. SCHOOLS & MFG, ETC.
NURSING HOMES

Go Contacts Mail Drill Faculty Reports Capital Exp View Finance Warehouse

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

The Quick Find Menu



The screenshot shows the MDS software interface. On the left, the 'Quick Find Menu' is visible, listing various options such as 'Customer Sales Orders', 'Customer Quotes', 'Customer Detail History', 'Product Detail History', 'A/P Checks', 'Purchase Orders', 'Vendor Payments', 'A/P Checks', 'G/L History', 'Open Receivables', and 'Search for a Program'. A green arrow points to 'Customer Detail History'. The main window displays a table with columns for Date, Time, Description, Status, D., C., and Total. The table contains three rows of data:

Date	Time	Description	Status	D.	C.	Total
10/15/2013	01:00 pm	Sales Meeting	Sales			0000261
10/16/2013	10:30 am	Management Meeting	Mana...			0000265
10/21/2013	08:30 am	Issue Group Meeting	Issue G...			0000266

At the bottom of the interface, there is a toolbar with various icons for navigation and actions, including 'Drill', 'Reports', 'View', 'Print', 'Inquiry', 'Cancel', 'Off', and 'Popup'.

This menu option provides the ability to quickly drill down to detailed information. In this example, we are accessing the Customer Detail History.

The Quick Find Menu



tsipe2.tshinc.com-DE/0.12-MDS.CUST.DET.HIST.DRILL01151

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Lookup

MDS Customer History Lookup

Company Range: 01 To: 01 Found: 411

Customer: UMC UNIV. KS117 MEDICAL CENTER SURGICAL SUITE

Product Class Range: TO

Product Range: TO

Unit Sale: 1 at 53.150 on 070102

Line	Product	Description	Nov	Dec	Jan	Feb	Mar	Apr	Avg	YTD	1 YTD	YTD	1 YTD
1.	007006	PKG III TRANSDUCER OFI 3.07	0	0	0	0	0	0	0	0	0	0	0
2.	007007	LA LNS ULTRASONIC	0	0	0	0	0	0	0	0	0	0	0
3.	007008	VL LIDOCAINE 1% PK	0	0	0	0	0	0	0	0	0	0	0
4.	007009	PK LNS PAPER THER	0	0	0	0	0	0	0	0	0	0	0
5.	007010	PK BKG PAPER THER	0	0	0	0	0	0	0	0	0	0	0

Enter Line# for Detail or LHM to Ch...

Print Log Ctrl-Sql

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Include Vendor Date Vendor Group 3:52:11 PM

The Customer Detail History is displayed. We could then drill down on the data even further, by clicking on a product to access the Stock Status Inquiry.

The Quick Find Menu



tsiipe2.tshinc.com-DE/3-12-AM/IN.MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Find

MDS Menu Find

break menu

Customer Sales Orders

Customer Quotes

Customer Detail History

Product Detail History

A/P Checks

Purchase Orders

Vendor Payments

A/P Checks

G/L History

Open Receivables

Search for a Program

Date	Time	Description	Status	D...	C...	Task No...
10/15/2013	01:00 pm	Sales Meeting	Sales ...			0000261
10/16/2013	10:30 am	Management Meeting	Mano...			0000265
10/21/2013	08:30 am	User Group Meeting	User G...			0000266

10/18/2013 0:00 am

Annual Sales by Customer Class Description

Customer Class Description	Percentage
DOCTORS, CLINICS	30.3%
HOSPITALS	28.7%
MISC. SCHOOLS & MFG, ETC.	3.1%
NURSING HOMES	37.9%

Legend

- DOCTORS, CLINICS
- HOSPITALS
- MISC. SCHOOLS & MFG, ETC.
- NURSING HOMES

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Additionally, you can search for a specific menu item.

The Quick Find Menu



tsiipe2.tshinc.com-DE/0.12-MAIN.MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Find

Quick Find Menu

Quick Find Menu

Customer Sales Order

Customer Quotes

Customer Detail History

Product Detail History

A/P Checks

Purchase Orders

Vendor Proposals

A/P Checks

G/L History

Open Receivables

Search for a Program

Date	Time	Description	Status	D...	C...	Task No...
10/15/2013	01:00 pm	Sales Meeting	Sales ...			0000261
10/16/2013	10:30 am	Management Meeting	Mana...			0000265
10/17/2013	08:30 am	Issue Group Meeting	Issue...			0000266

Simply enter the information you would like to find.

Annual Sales by Customer Class Description

Customer Class Description	Percentage
DOCTORS, CLINICS	30.3%
HOSPITALS	28.6%
MISC. SCHOOLS & MFG, ETC.	3.1%
NURSING HOMES	31%

Legend

- DOCTORS, CLINICS
- HOSPITALS
- MISC. SCHOOLS & MFG, ETC.
- NURSING HOMES

Go Contacts Mail Drill Faculty Reports Capital Exp View Finance Warehouse

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

The Quick Find Menu



tshe2.tshinc.com-DE/0_12-FIND.MENU012S1

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Menu Locator

Search String: credit memo

S.Line	Menu Line	Menu Sub process	Menu Status	Typ
5	Daily Credit Memo Register	FD.CM.DRC01?	Standard	R
2	Invoice and Credit Memo Void	VOID.DR/VR#2	Standard	P
3	Credit Memo Processing	CM.DR/VR#1	Standard	P
4	Monthly Credit Memo Register	CREDIT.MEMO.REGISTER	Standard	R
5	Credit Memo Reason Code	REASON.CODE.MAINT00	Standard	P
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				

PUT TO LINE TO SELECT, HIGHLIGHTED LINE FOR POPUP MENU, OR END

OK XXXX

Buttons: Add Page, Del Page, Help, Ok/End, Insert, Delete, Prev, Next, Inquiry, Cancel, Off, PopUp

Just click on the item to go to the menu.

The Quick Find Menu



tsihs2.tsihi.com-DE/0_12-FIND.MENU.SEARCH(10125)

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Menu Locator Search Screen

1. Keywords/Search Strings

1	LOOKUP
2	MAINT
3	
4	
5	

2. Select ADD

3. Filter d Both

Search

Menu Names	Y
Keywords	Y
Subprocess	Y

PREPARE TO CHANGE, 0 TO ACCEPT, OR END

XXXX

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Include Underline Vendor Group 3:52:13 PM

Enter the keywords or phrases to search for in the menus, keywords and subprocesses.

The Quick Find Menu




tshe2.tshinc.com-DE/0_12-FIND.MENU.SEARCH(10125)

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Menu Locator Search Screen

1. Keywords/Search Strings

1	LOGON
2	MAINT
3	
4	
5	

2. Select 

3. Filter

Search

Menu Names	<input type="checkbox"/>
Keywords	<input type="checkbox"/>
Subprocess	<input type="checkbox"/>

PREPARE TO CHANGE, 0 TO ACCEPT, OR END

XXXXX

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Include Underline Vendor Group 3:52:13 PM

Enter AND if you want ALL of the search criteria to match when selecting menu items.

Enter OR if you want ANY of the search criteria to match when selecting menu items.

The Quick Find Menu



tshe2.tshinc.com-DE/0_12-FIND_MENU_SEARCH(10125)

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Menu Locator Search Screen

1. Keywords/Search Strings

1	LOGON
2	MAINT
3	
4	
5	

2. Select

3. Filter ←

Search

Menu Names	<input type="checkbox"/>
Keywords	<input type="checkbox"/>
Subprocess	<input type="checkbox"/>

PREPARE TO CHANGE, 0 TO ACCEPT, OR END

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Include Underline Vendor Group 3:52:12 PM

Enter a filter option, which will search only those items that are processes, menus, or both.

The Quick Find Menu



Application

Menu Locator

Search String: LOOKUP,MAIN

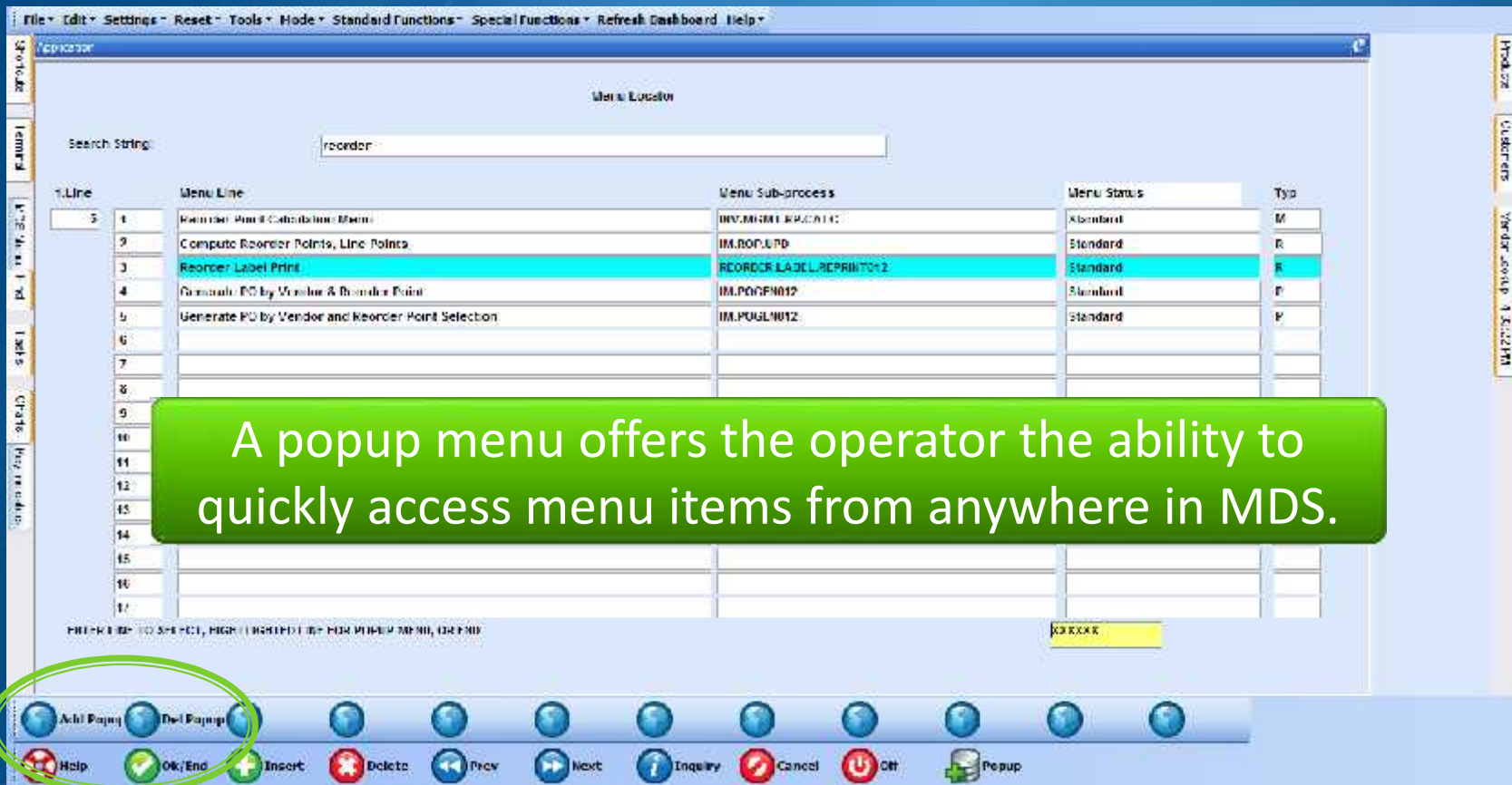
1.Line	Menu Line	Menu Sub-process	Menu Status	Type
1	MDS Lookup Options Maintenance	MDS_LOOKUP.OPTION.MAINT01	Standard	P
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				

ENTER LINE TO SELECT, HIGHLIGHTED LINE FOR POPUP MENU, OR END

XXXXXXXX

Click on the item to go to the menu.

Create a Popup

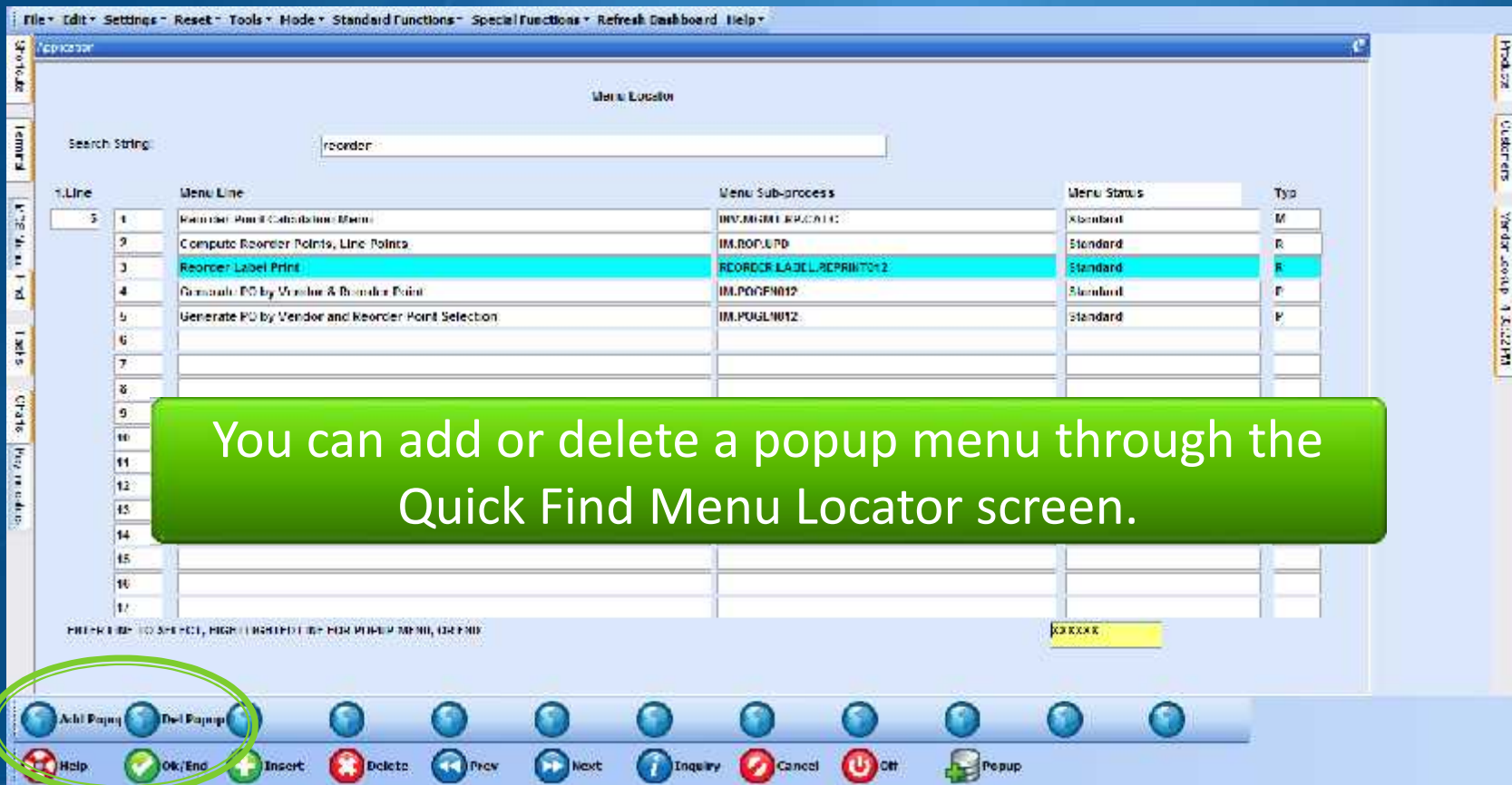


The screenshot displays the MDS software interface. At the top, a menu bar includes options like File, Edit, Settings, Reset, Tools, Mode, Standard Functions, Special Functions, Refresh Dashboard, and Help. Below the menu bar, a search string 'reorder' is entered. A table lists menu items with columns for Line, Menu Line, Menu Sub-process, Menu Status, and Type. The 'Reorder Label Print' item is highlighted in blue. A green callout box with white text states: 'A popup menu offers the operator the ability to quickly access menu items from anywhere in MDS.' At the bottom, a toolbar contains various icons, with the 'Add Popup' icon circled in green.

Line	Menu Line	Menu Sub-process	Menu Status	Type
1	Reorder Item Contribution Menu	INV.MENI.RECALC	Standard	M
2	Compute Reorder Points, Line Points	IM.BOP.LPD	Standard	R
3	Reorder Label Print	REORDER LABEL/REPRINT02	Standard	R
4	Generate PO by Vendor & Reorder Point	IM.POP.M02	Standard	P
5	Generate PO by Vendor and Reorder Point Selection	IM.POGLM02	Standard	P
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				

Toolbar icons: Add Popup, Del Popup, Help, Ok/End, Insert, Delete, Prev, Next, Inquiry, Cancel, Off, Popup

Create a Popup



File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Menu Locator

Search String: reorder

Line	Menu Line	Menu Sub-process	Menu Status	Type
1	Reorder Item Contribution Menu	INV.MENUEPUB111	Standard	M
2	Compute Reorder Points, Line Points	IM.BOP.LPD	Standard	R
3	Reorder Label Print	REORDER LABEL PRINT012	Standard	R
4	Generate PO by Vendor & Reorder Point	IM.POPPM012	Standard	P
5	Generate PO by Vendor and Reorder Point Selection	IM.POGLM012	Standard	P
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				

PREVIOUS TO SPEC, HIGH LIGHTED IS FOR MENU MENU, OR END

XXXXX

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off Popup

The Popup Menu at Work



Access other menu items quickly by clicking on the Popup button.

1. Ship Via	2. Weight	3. Volume	4. Charge P	5. Actual Fr	6. Freight

7. Box #	Trucking Number	Box Weight	Box Charge	Box Rate
1.	170879580401480018	5.00	5.84	14.0515
2.				
3.				

Enter Line# to Change, 0 or DID to Invoice

XXXXXXXX

Buttons: Upd Ent, Void Ent, Inscr, Delete, Prev, Next, Inquiry, Cancel, On, **Popup**

The Popup Menu at Work



demo.12 [tshttp2.tshinc.com:DC/NO.12.MDS.SHIPMENT.UPDATED:1251]

File Edit Settings Reset Tools Hide Standard Functions Special Functions Refresh Dashboard Help

Asp color

MDS Shipment Processing Screen

Release Number: 6714186501

Customer: MARCOV Ship to: MICHAEL MARCOWITZ MD
4260 KENNEDY BLVD
BRUDALYN NY 11023

1. Ship Via
2. Weight
3. Volume
4. Charge
5. Actual Frt
6. Freight

Release Total: 457.47

7.Box #	Trucking Number	Box Weight	Box Charge	Box Rate
1.	170879580401480018	5.05	5.84	10.89
2.				
3.				

Enter Line# to Change, 0 or DID to Invoice

XXXXXXXX

Upd Ent Void Link Inscr Delete Prev Next Inquiry Cancel On **Popup**

In this example, we are processing shipping information, and will also print reorder labels.

The Popup Menu at Work

A screenshot of a web application interface. The browser window title is "Demo 12 [tshpc2.tshinc.com: DC/NO_12_johnsen]". The application has a menu bar with "File", "Edit", "Settings", "Reset", "Tools", "Hide", "Standard Functions", "Special Functions", "Refresh Dashboard", and "Help". A sidebar on the left contains a "MDS Menu" with items: "1.Reorder Label Print", "2.Manifest Print", and "3.Location Movement". A green oval highlights the "1.Reorder Label Print" item. The main content area is titled "Reorder Label Printing" and contains two input fields with the value "0011000000". A "Capture On" button is visible in the top right of the form area. A green callout box is overlaid on the bottom left of the screenshot.

After printing the label, the user can finish the shipping, and the release will be invoiced.

The Popup Menu at Work



demo.12 [tshpc2.tshinc.com:DC/NO.12.johnsen]

File Edit Settings Reset Tools Hide Standard Functions Special Functions Refresh Dashboard Help

MDS Menu Find

10/09/2013 8:00 am

10/09/2013 2:00pm Sales Meeting

1.Reorder Label Print Application

2.Manifest Print

3.Location Movement

Reorder Label Reprint

7. Release Number 001488609 001488609

After printing the label, the user can finish the shipping, and the release will be invoiced.

Invoice

Inv Number: 01519285
Page: 1

FSH Import Company
1633 ROUTE 40
CLIFTON, NJ 07013
Tel: 973-777-8893
Fax: 973-777-3063
NJ1044579

Remit To:
FSH Import Company
1633 ROUTE 40
CLIFTON, NJ 07013
Tel: 973-777-8893
Fax:

Ship-to: 001 NJ

PO BOX 300000
4200 BIRCHWOOD DRIVE
BROOKLYN NY 10024

Invoice Date: 10/09/13
Ship Date: 10/09/13
Our Order No.: 01341083001
License: 02404308 Exp: 02/02/14
Special Instructions:

Customer: 001 IMPORT
Rep Var: 000
Customer Order #: 641134
Terms: NET 30
Pkg # 180111765 Exp: 11/11/14

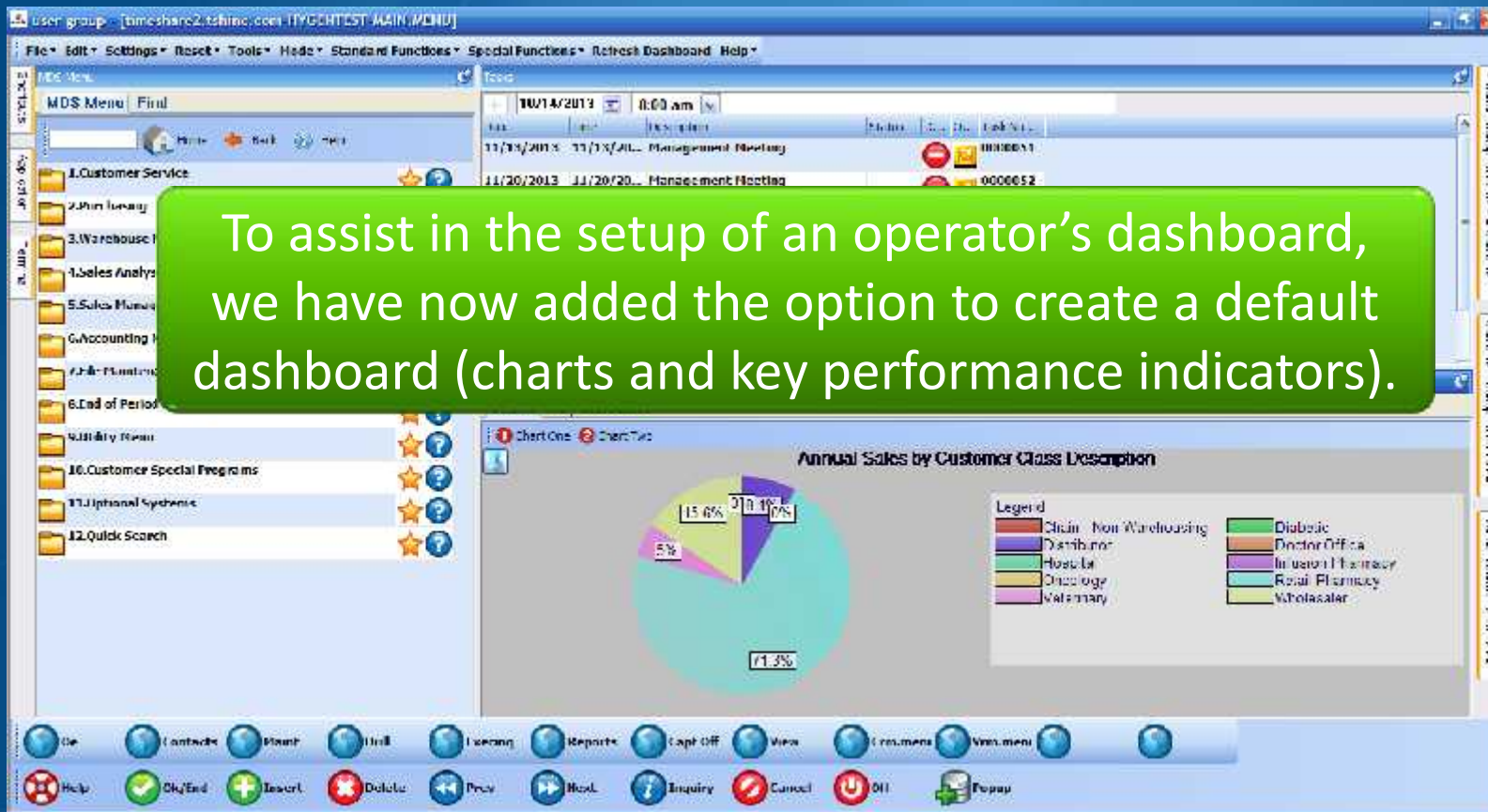
Item	Description / Quantity	Transit	IME	Suppl	IME	RT	Qty	Unit Price	Unit	Amount
001-01	Opticaline Tube Opticaline Tube SPO# : 0212-0214-02 SPO# NUMBER : 1441144 Tens Strength: 300 mg SPO# SDA: 300 mg Tens Strength: 300 mg Tens Strength: 300 mg Exp: 12/31/15 Exp: 12/31/15	4	ST	4	ST	0		25.500	ST	102.00
	SID 300ML									102.00
	SU GRAY TAN 0.375#									13.00
	TENS 300									1.84
	TENS TOTAL									126.84
	CUSTOM TRACKING NUMBER: SHIP# 120470003409463013 SHIP# 120470003409463013 State License for NY 1001174 Exp: 07/31/14									

Columns: Weight: 0.0 Fee: 0.00

Default Dashboard Setups



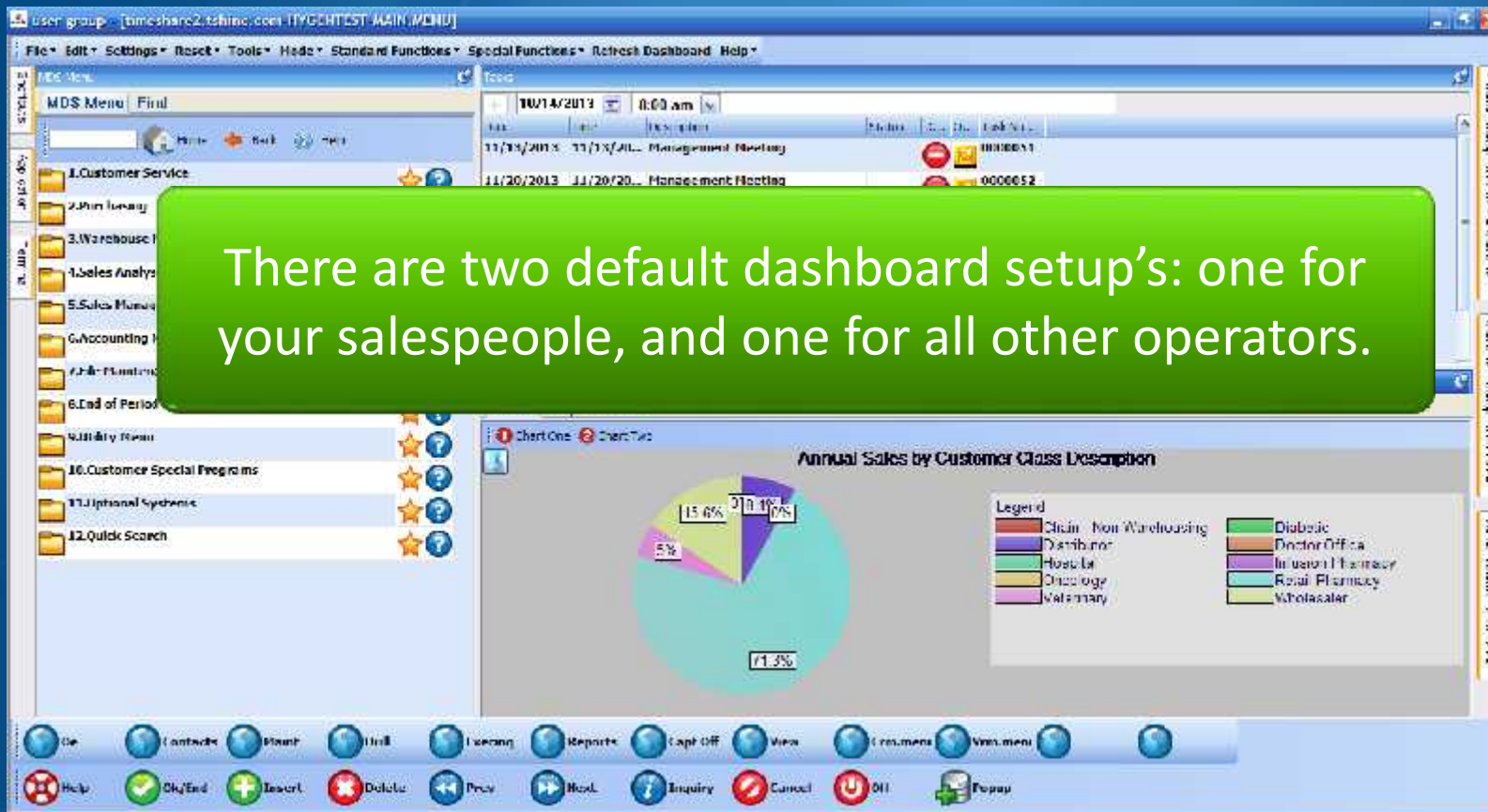
To assist in the setup of an operator's dashboard, we have now added the option to create a default dashboard (charts and key performance indicators).



Default Dashboard Setups



There are two default dashboard setup's: one for your salespeople, and one for all other operators.



Key Performance Indicators



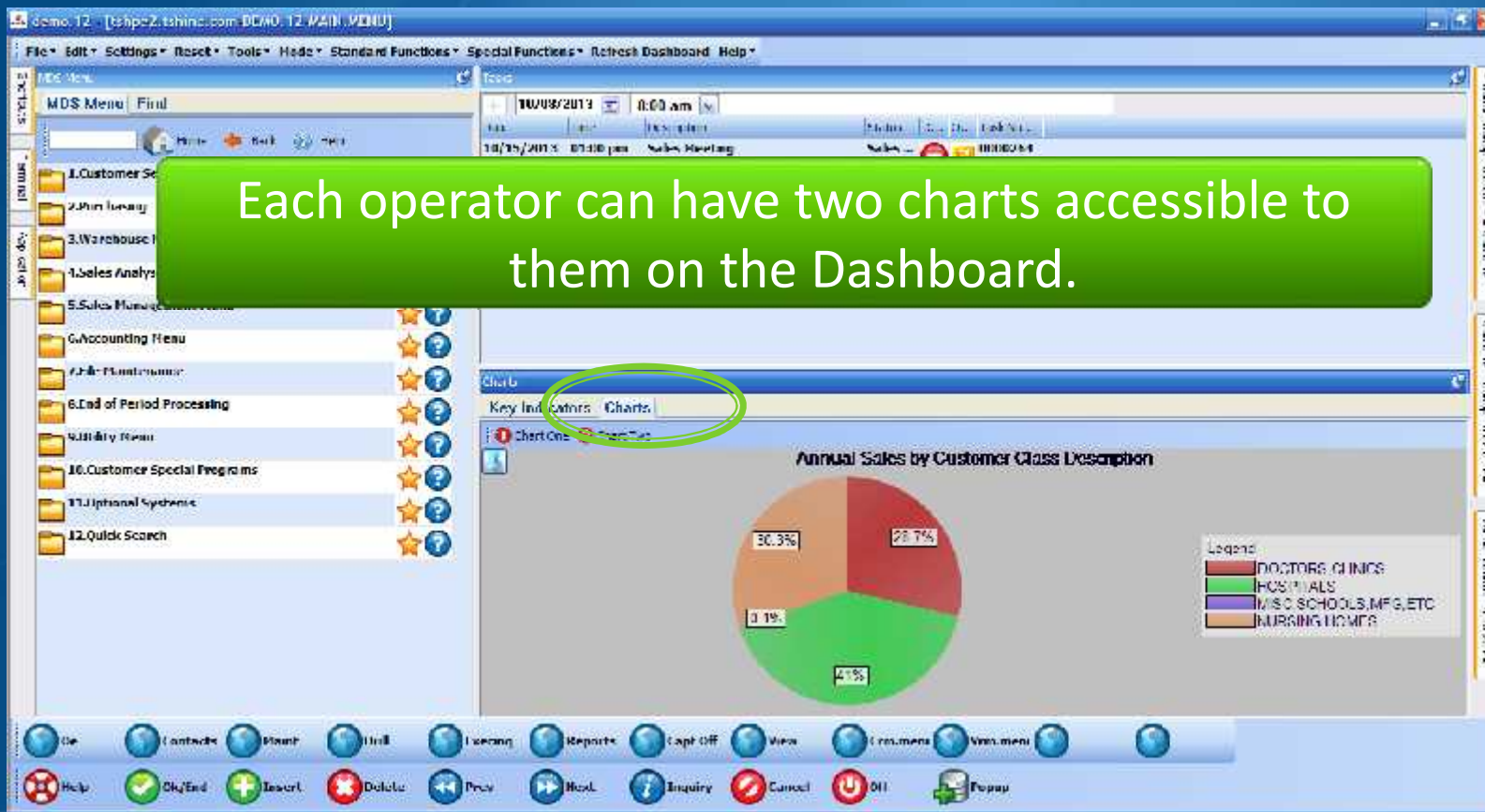
These indicators display valuable up-to-date information for an operator.

Indicator	Daily	Monthly	This Year	Last Year
Credit Dollars	(\$65)	(\$037)	(\$60,657)	
Salesman Calls	1	2	2	
Sales Dollars Daily - Trend Statistics	-13%	11%	0%	122%
Sales Dollars Monthly - Trend Statistics	10%	12%	0%	90%
Sales Dollars Yearly - Trend Statistics	0%	10%	0%	74%
Sales Dollars	\$20,607	\$234,850	\$5,191,454	
Sales Dollars Daily	\$20,352			

Charts



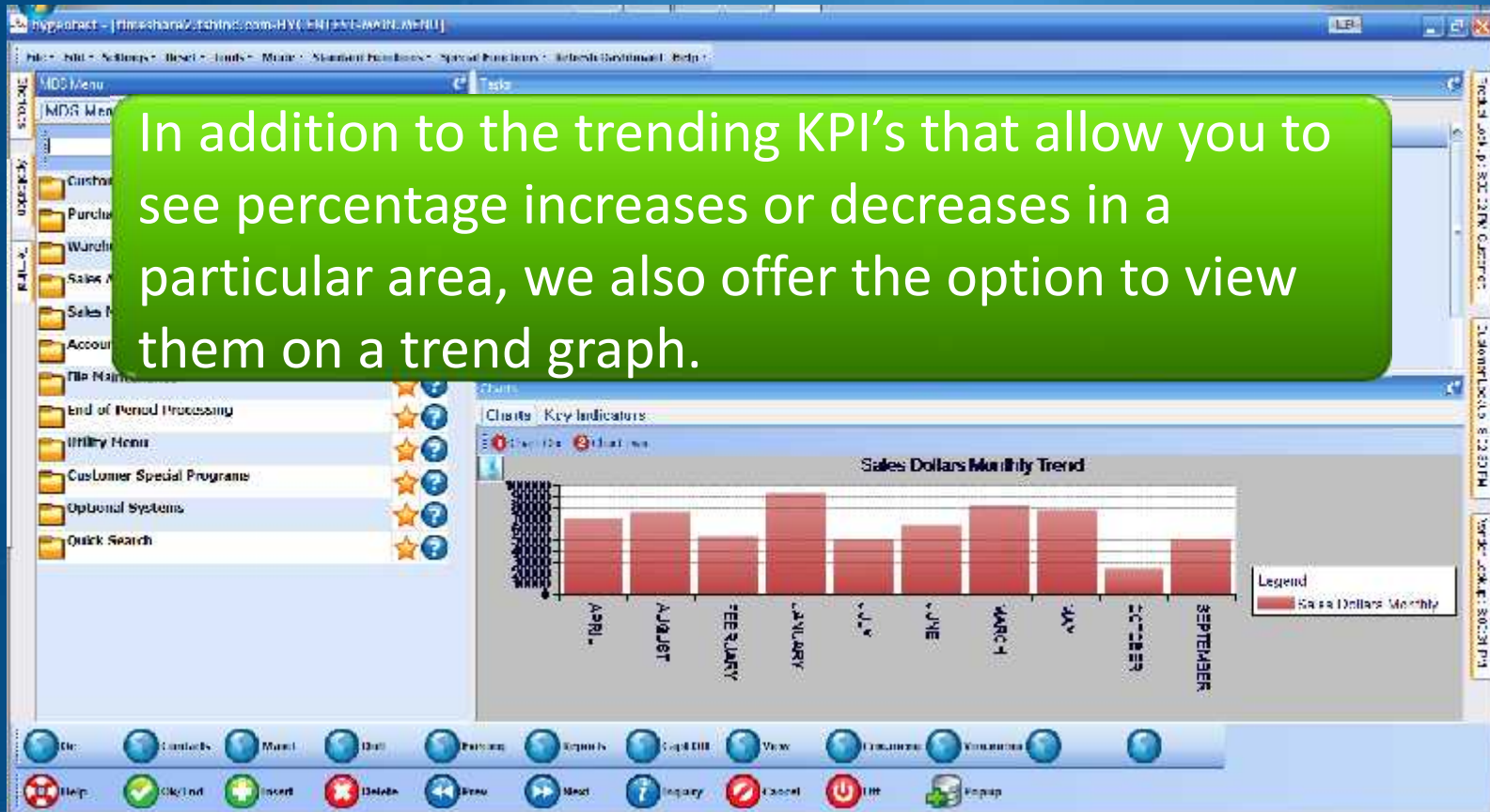
Each operator can have two charts accessible to them on the Dashboard.



Trending KPI's and Graphs



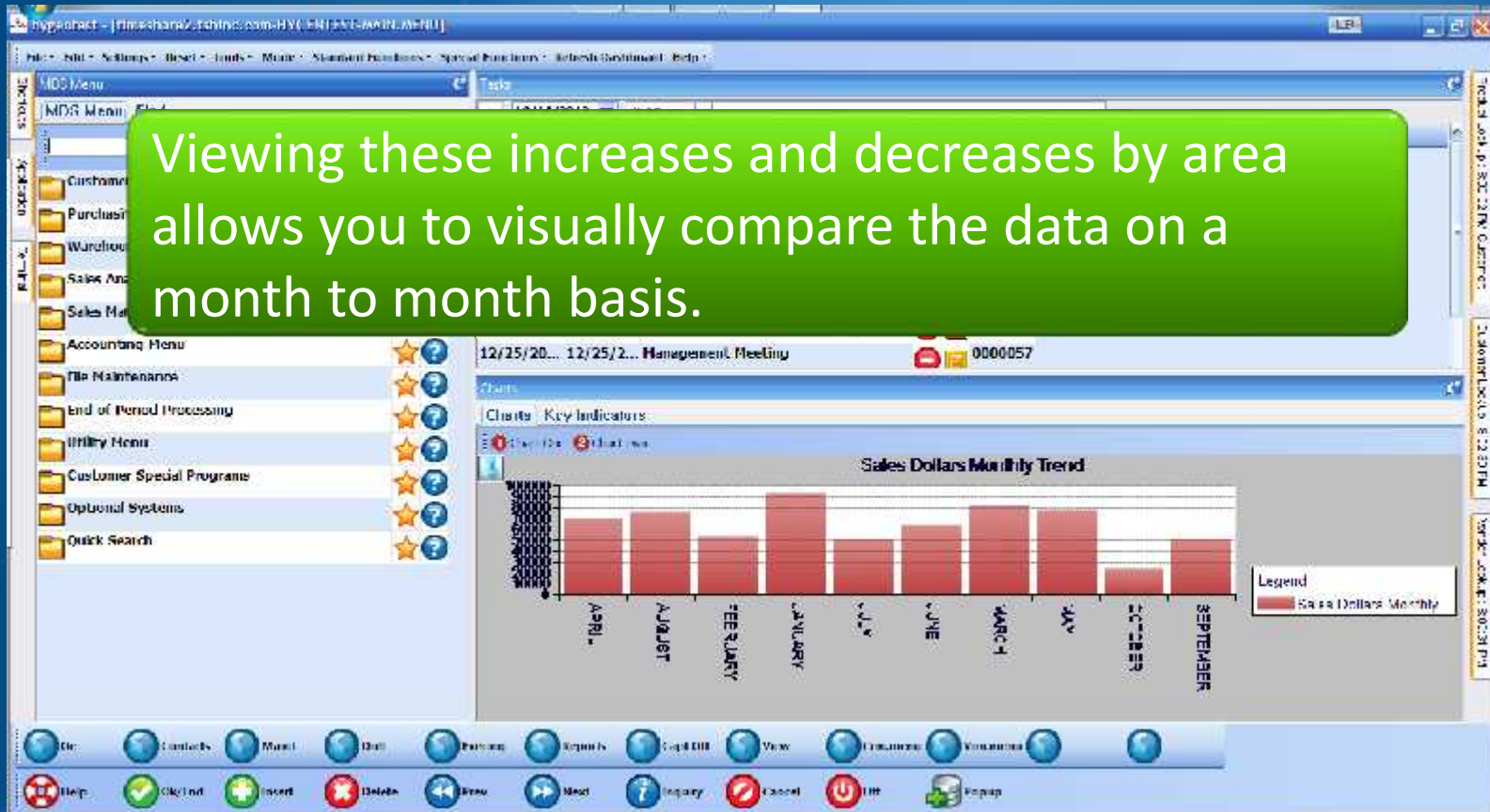
In addition to the trending KPI's that allow you to see percentage increases or decreases in a particular area, we also offer the option to view them on a trend graph.



Trending KPI's and Graphs



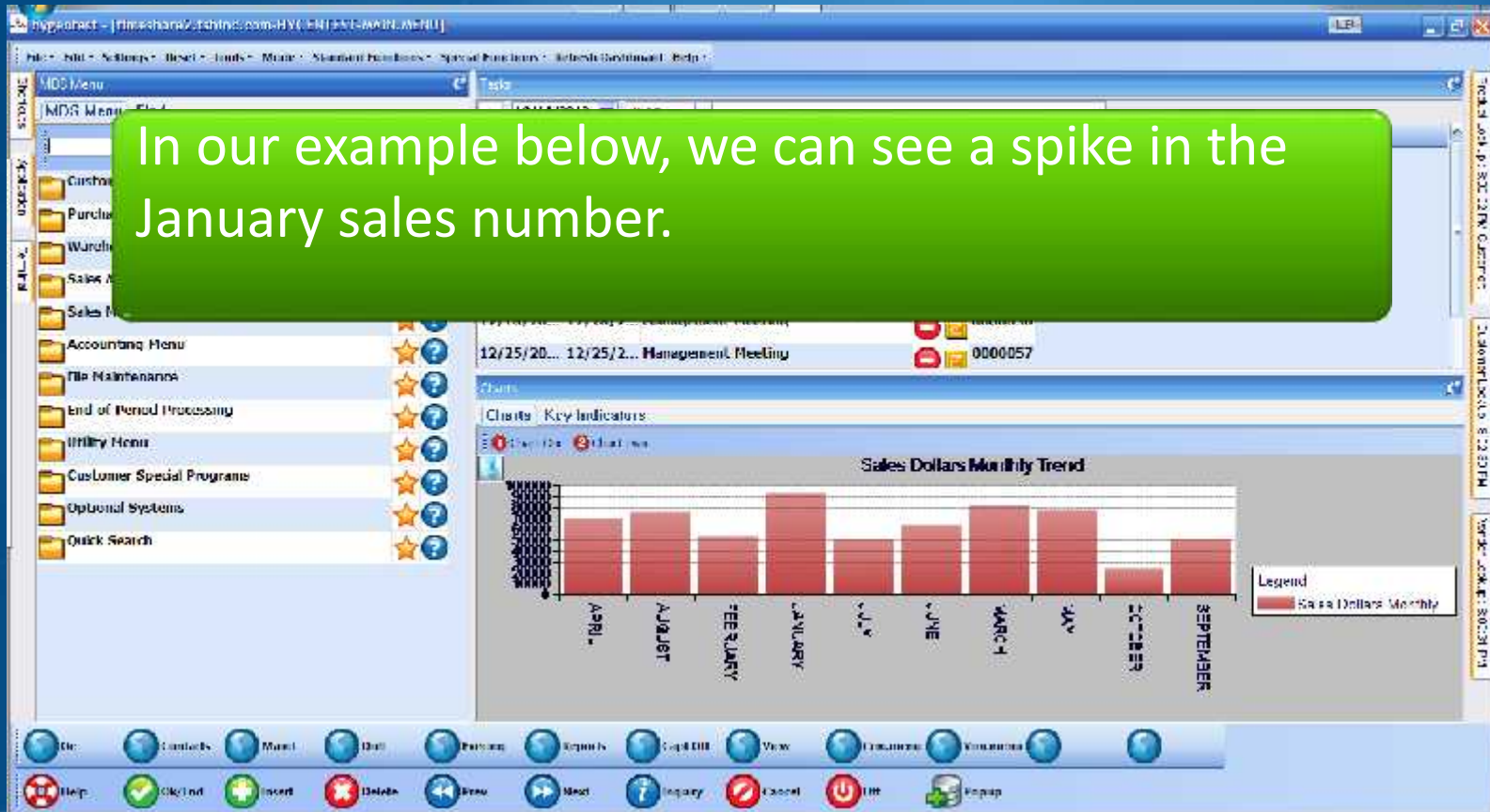
Viewing these increases and decreases by area allows you to visually compare the data on a month to month basis.



Trending KPI's and Graphs



In our example below, we can see a spike in the January sales number.



Create a Task



To create a new task select the date, time and enter a description of the task, then click on the add button.

Date	Time	Description	Status	D...	C...	Task Na...
10/21/2013	08:30 am	User Group Conference				
10/15/2013	09:00 am	Conference Call with ABC Health...				0000004
10/15/2013	10:10 am	Management Meeting				0000003

Legend:

- Chain - Non Warehousing
- Distributor
- Hospital
- Oncology
- Veterinary
- Diabetic
- Doctor Office
- Infectious Pharmacy
- Retail Pharmacy
- Wholesaler

Create a Task



timshare2.tshinc.com - IY9ENTEST - MAIN MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

MDS Menu Find

1.Customer Service
2.Purchasing
3.Warehouse Management & Inventory
4.Sales Analysis
5.Sales Management Menu
6.Accounting Menu
7.Facility Maintenance
8.Facility Period Processing
9.Utility Menu
10.Customer Special Programs
11.Optimal Systems
12.Quick Search

Date	Time	Description	Status	D...	C...	Task No...
10/10/2013	10:00 am	User Group Dress Rehearsal	Past			000000J
10/15/2013	09:00 am	Conference Call with ABC Health...				0000004
10/16/2013	10:10 am	Management Meeting				0000006
10/21/2013	08:30 am	User Group Conference				0000008

Annual Sales by Customer Class Description

Legend:

- Chain - Non Warehousing
- Distributor
- Hospital
- Oncology
- Veterinary
- Label C
- Doctor Office
- Infusion Pharmacy
- Retail Pharmacy
- Wholesaler

06 Contacts Mail Drill Forecasting Reports Capital Exp View Create New Measure

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

The new task has been added.

Create a Task



timeshare2.tshinc.com - MYAGENTEST - MAIN MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

MDS Menu Find

Home Fax TSP

1. Customer Service
2. Purchasing
3. Warehouse Management & Inventory
4. Sales Analysis
5. Sales Management Menu
6. Accounting Menu
7. File Maintenance
8. Facial Perical Processing
9. Utility Menu
10. Customer Special Pro
11. Optimal Systems
12. Quick Search

Tasks

Date	Time	Description	Status	D...	C...	Task Na...
10/10/2013	10:00 am	User Group Uress Rehearsal	Past			000006J
10/15/2013	09:00 am	Conference Call with ABC Healthc...				0000064
10/16/2013	10:10 am	Management Meeting				0000066
10/21/2013	08:30 am	User Group Conference				0000068

To delete a task, click on the remove button.

100%

15.6% 10.8% 8.1% 0%

71.3%

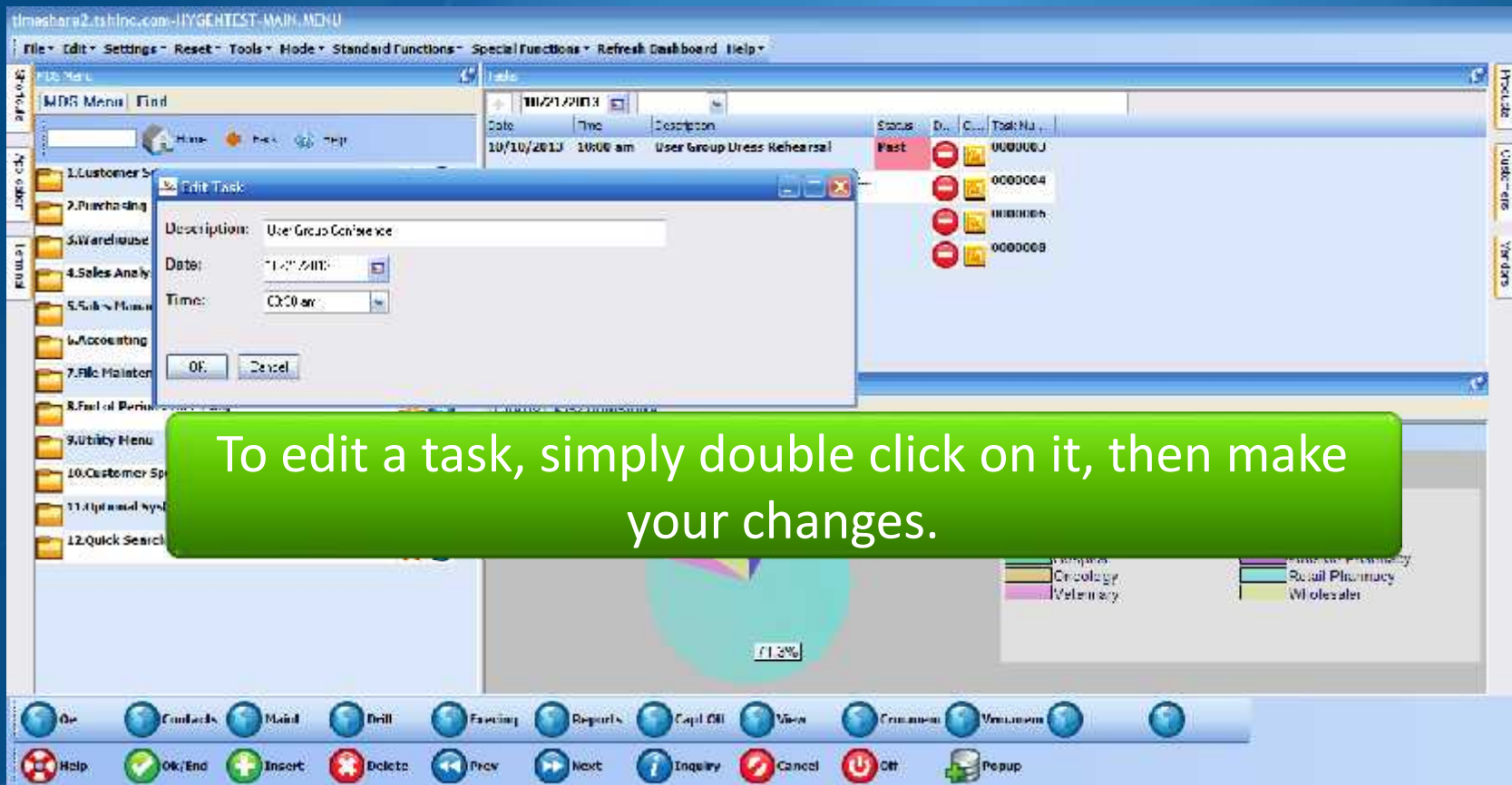
Legend

- Chain - Non Warehousing
- Distributor
- Hospital
- Creology
- Veterinary
- Diabetic
- Doctor Office
- Infusion Pharmacy
- Retail Pharmacy
- Wholesaler

Go Contacts Mail Drill Faxing Reports Capital Call View Create New Measure

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Edit a Task



The screenshot displays a software application window titled "timshara2.tshinc.com-11YGENTEST-MAIN.MENU". The interface includes a menu bar with options like "File", "Edit", "Settings", "Reset", "Tools", "Mode", "Standard Functions", "Special Functions", "Refresh Dashboard", and "Help". A left sidebar lists various menu items such as "1.Customer Service", "2.Purchasing", "3.Warehouse", "4.Sales Analy", "5.Subs Menu", "6.Accounting", "7.File Mainten", "8.Fiscal Period", "9.Utility Menu", "10.Customer Sp", "11.Optimized Syst", and "12.Quick Search". The main area shows a table of tasks with columns for "Date", "Time", "Description", "Status", "D.", "C.", and "Task No.". One task is highlighted: "10/10/2013 10:00 am User Group Dress Rehearsal" with a status of "Past". An "Edit Task" dialog box is open, showing fields for "Description" (User Group Conference), "Date" (10/10/2013), and "Time" (00:00 am). A green callout box with white text states: "To edit a task, simply double click on it, then make your changes." The bottom of the screen features a toolbar with icons for "Help", "Ok/End", "Insert", "Delete", "Prev", "Next", "Inquiry", "Cancel", "Off", and "Popup".

Add To Your Calendar



The screenshot shows a software interface with a menu on the left and a task list on the right. The task list has columns for Date, Time, Description, Status, D., C., and Task No. A green circle highlights the appointment button (a calendar icon) for the task 'User Group Conference' on 10/24/2013 at 08:30 am.

Date	Time	Description	Status	D.	C.	Task No.
10/10/2013	10:00 am	User Group Uress Rehearsal	Past			000006J
10/15/2013	09:00 am	Conference Call with ABC Health...				0000064
10/16/2013	10:30 am	Management Meeting				000006H
10/24/2013	08:30 am	User Group Conference				000006B

Click on the appointment button to add the task to your calendar program.

Add To Your Calendar



The screenshot displays a software application window titled "User Group Conference - Appointment". The window has a menu bar with "File", "Edit", "Settings", "Reset", "Tools", and "Mod". Below the menu bar is a toolbar with various icons for actions like "Save", "Close", "Invite", "Attendees", "Forward", "Appointment", "Scheduling Assistant", "Online Meeting", "Busy", "Recurrence", "Time Zones", "Latecance", "Spelling", and "Pronunciation". The main area of the window contains the following information:

- Subject: User Group Conference
- Location: [Empty field]
- Start time: Mon 10/21/2013 9:30 AM [All day event]
- End time: Mon 10/21/2013 10:00 AM

At the bottom of the window, there is a taskbar with several icons: Help, Ok/End, Insert, Delete, Prev, Next, Inquiry, Cancel, Off, and Pop-up.

Tasks are Integrated in MDS



The screenshot displays the MDS software interface. On the left is a navigation menu with categories like 'MDS Menu' and 'Find'. The main area shows a 'Tasks' table with columns for Date, Time, Description, Status, and Task Number. A green oval highlights the 'Task Number' column. Below the table is a pie chart and a legend. At the bottom is a toolbar with various icons.

Date	Time	Description	Status	Task Number
10/10/2013	10:00 am	User Group Dress Rehearsal	Past	000000J
10/15/2013	09:00 am	Conference Call with ABC Health...		0000004
10/16/2013	10:10 am	Management Meeting		000000H
10/21/2013	08:30 am	User Group Conference		0000008

Click on the Task Number to go to the Task List Maintenance.

Task List Maintenance



timshare2.tshinc.com - (Y3)TEST-TASK_LISTS_ENTRY01251

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Task List

Position in list

Priority Code

Status Code

Assignment

7. Name

1. Management Meeting

2.

3.

4.

5.

6.

8. Due Date / Start Date

9. Recurrence

10. Recurring Task

11. Linking Task

12. Day of Week / Month

13. Day of Month 2

14. Complete (Y/N)

Original Task ID

Last Record of Original Task?

10-1-12

10-50 min

XXX

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Include Update Site Vendors

Update your task to be recurring.

Task List Maintenance



Update your task to be recurring.

10 Recurring Task

W

ACCEPTABLE VALUES :

- N Not Recurring
- D Daily
- W Weekly
- M Monthly
- B Bimonthly
- Y Yearly

In my example, the task is set to weekly.

Task List Maintenance



timshare2.tshinc.com - IY3ENTEST-TASK_LISTS_ENTRY01251

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Task Lists Entry (Detail)

Task ID: 400004 Position in list: 1

1. Operator: [] 2. Responsibility: [] 3. Condition: [] 4. Priority Code: [] 5. Status Code: [] 6. Description: [] 7. Notes: []

8. Due Date / Start Date: 10/1/12

9. Start time: 08:30 am

10. Frequency: W Weekly

11. Ending Date of Task: 10/01/11

12. Day of Week / Month: S Workday

13. Day of Month: []

14. Complete (Y/N): []

Original Task ID: [] Last Record of Original Task?: []

ENTER F1 IF A TO CHANGE, DEL F2 TO DELETE, O TO ACCEPT

Buttons: Prev Rec, Next Rec, Help, Ok/End, Insert, Delete, Prev, Next, Inquiry, Cancel, Off, PopUp

The date the task will end, along with the day of the week are selected.

Task List Maintenance



The screenshot displays the MDS NX software interface. On the left, a navigation pane lists various modules, with '7. End of Day Processing' highlighted by a green arrow. The main window shows a 'Task List' table with columns for 'Task No.', 'Task Name', 'Status', and 'Task No.'. The table contains several rows of 'Management Meeting' tasks. A green callout box is overlaid on the interface, containing the text: 'The End of Day process will create the recurring tasks, with the day and time selected.'

Task No.	Task Name	Status	Task No.
11/11/2013	11/11/2013 Management Meeting	Red circle with white 'X'	000051
11/20/2013	11/20/2013 Management Meeting	Red circle with white 'X'	000052
11/27/2013	11/27/2013 Management Meeting	Red circle with white 'X'	000053
12/4/2013	12/4/2013 Management Meeting	Red circle with white 'X'	000054
12/11/2013	12/11/2013 Management Meeting	Red circle with white 'X'	000055
12/18/2013	12/18/2013 Management Meeting	Red circle with white 'X'	000056
12/25/2013	12/25/2013 Management Meeting	Red circle with white 'X'	000057

Task List Maintenance



timeshare2.tshinc.com - IY9ENTEST - MAIN MENU

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

MDS Menu Find

1. Customer Service
2. Purchasing
3. Warehouse Management & Inventory
4. Sales Analysis
5. Sales Management Menu
6. Accounting
7. File Maintenance
8. Fiscal Period
9. Utility Menu
10. Customer Special Programs
11. Optimal Systems
12. Quick Search

Task List

Date	Time	Description	Status	D...	C...	Task Na...
10/23/2013	08:30 am	User Group Conference				0000008
10/10/2013	10:00 am	User Group Dress Rehearsal	Fast			0000003
10/15/2013	09:00 am	Conference Call with AM Health...				0000001
10/10/2013	10:30 am	Management Meeting				0000000

Annual Sales by Customer Class Description

Legend:

- Chain - Non Warehousing
- Distributor
- Hospital
- Creology
- Veterinary
- Diabetic
- Doctor Office
- Infusion Pharmacy
- Retail Pharmacy
- Wholesaler

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off Pepup

Do you have tasks that you would like to mark complete? We can do this in Task List Maintenance.

Task List Maintenance



In this example, I have a task where the status shows as 'Past', due to the date. This is the task we will mark complete.

Date	Time	Description	Status	D...	C...	Task Na...
10/21/2013	08:00 am	User Group Conference	Past			0000008
10/15/2013	08:00 am	Vendor Conference	Past			0000009
10/16/2013	10:30 am	Management Meeting	Past			0000006

Legend for Pie Chart:

- Distributor
- Hospital
- Creology
- Veterinary
- Doctor Office
- Infusion Pharmacy
- Retail Pharmacy
- Wholesaler

Task List Maintenance



Completed Tasks vs. Removed Tasks
Marking a task as complete keeps that task on file. Completed tasks can still be included in reporting, where removing the task on the dashboard will delete it and it would not be included.

Date	Time	Description	Status	D...	C...	Task Na...
10/23/2013	08:00 am	User Group Conference				0000008
10/10/2013	10:00 am	User Group Dress Rehearsal	Fast			0000003

- Label C
- Doctor Office
- Infection Pharmacy
- Retail Pharmacy
- Wholesaler

Task List Maintenance



Use the drop down arrow and select 'Y' to mark the task as complete.

timshare2.tshinc.com - IY3ENTEST-TASK_LISTS_ENTRY01251

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

7. Select

8. Due Date / Start Date

9. Start time

10. Recurring task

11. Ending Date of Task

12. Day of Week / Month

13. []

14. Complete (Y/N)

Position in list

Pin list

1

2

3

4

5

6

10:00 am

Original Task ID

Last Record of Original Task?

Prev Rec Next Rec

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off PopUp

Task List Maintenance



Use the drop down arrow and select 'Y' to mark the task as complete.

1000 Original Task ID

ACCEPTABLE VALUES:
N - NO - Task NOT Complete
Y - Yes - Task IS Complete

Prev Rec Next Rec Help Ok/End Insert Delete Prev Next Inquiry Cancel Repup

Task List Maintenance



The screenshot displays the MDS NX software interface. On the left, a navigation menu lists 12 categories: 1. Customer Service, 2. Pin Invoicing, 3. Warehouse Management & Inventory, 4. Sales Analysis, 5. Sales Management & Menu, 6. Accounting Menu, 7. HR Maintenance, 8. End of Period Processing, 9. Utility Menu, 10. Customer Special Programs, 11. Operational Systems, and 12. Quick Search. The main window shows a 'Task List' for the date 10/14/2013 at 0:00 am. The task list contains three entries:

Date	Time	Description	Status	Task ID
10/21/2013	08:30 am	User Script Conference	Completed	0000008
10/15/2013	09:00 am	Conference Call with ABC Healthc...	Completed	0000004
10/16/2013	10:30 am	Management Meeting	Completed	0000004

Below the task list is a 'Charts' section titled 'Key Indicators' with a sub-chart 'Annual Sales by Customer Class Description'. The chart is a pie chart with four segments: Credit - Non Warehousing (15.8%), Distributor (34%), Diabetic (11%), and Doctor Office (39%). A legend on the right identifies the colors for each category.

A green callout box at the bottom of the screenshot contains the text: "After completing the task, and refreshing the Dashboard, the task no longer shows." This indicates that the task list is dynamically updated and only shows tasks that are not yet completed.

At the bottom of the interface, there is a toolbar with various icons for actions such as 'Go', 'Contact', 'Print', 'Print', 'Loading', 'Reports', 'Capt Off', 'View', 'Print menu', 'View menu', 'Help', 'Ok/End', 'Insert', 'Delete', 'Prev', 'Next', 'Inquiry', 'Cancel', 'Off', and 'Popup'.

Wrap-up



- Information at Your Fingertips
- Provide Quick Customer Service
- New Ways of Navigating MDS

Dashboard Features

