Customer Relationship Management (CRM) Guide

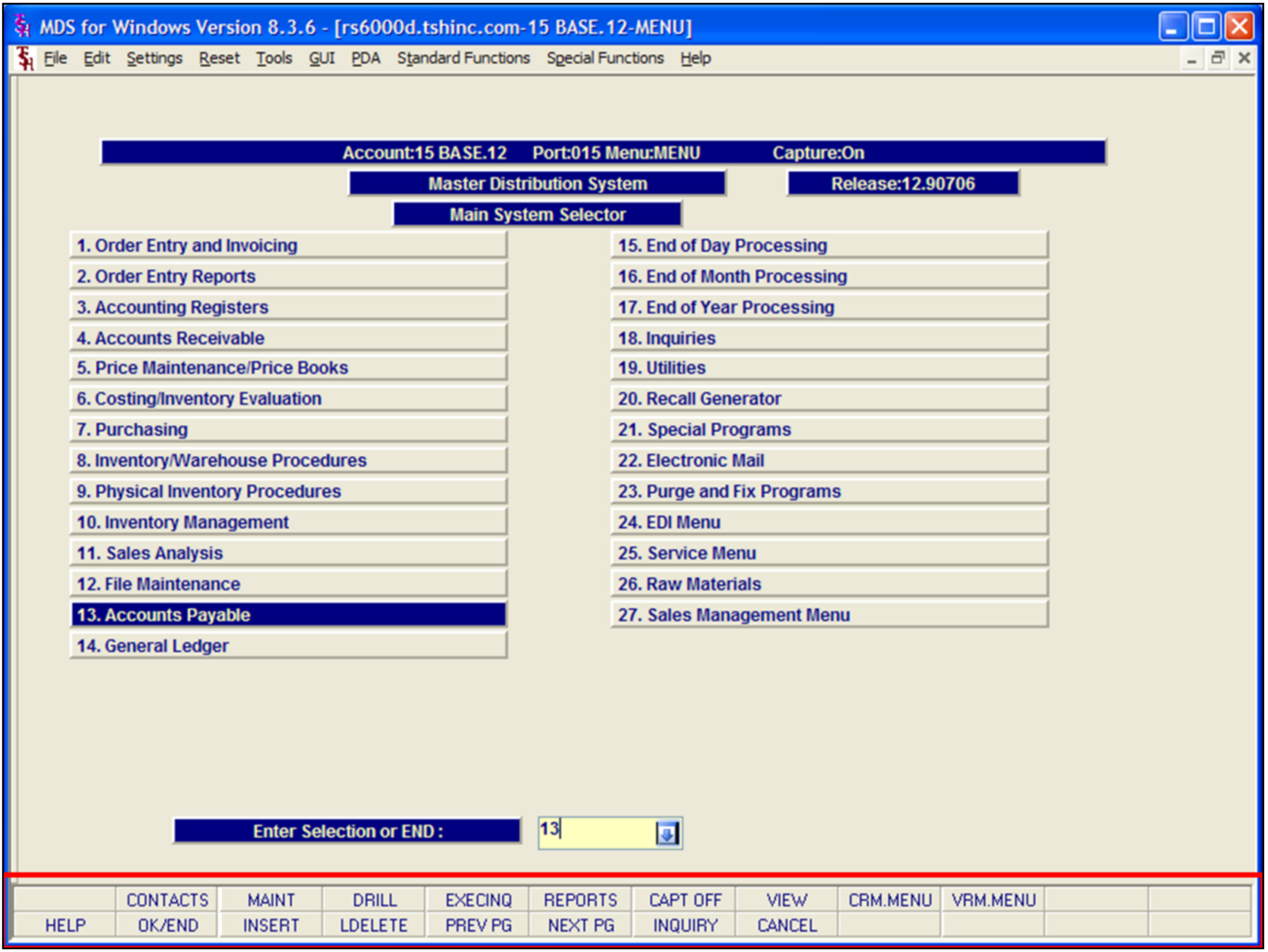
Training Guide
for CRM on MDS

From The Systems House, Inc.

Notes:

CRM Training Guide

The following training guide is a User's Guide for CRM (Customer Relationship Management) on MDS for Windows.



Notes:

Master File Maintenance Function Keys

The first 12 function keys on your keyboard (F1-F12) are reserved for special functions in the MDS master file maintenance programs. They appear on the last line of the screen as follows:

HELP - The HELP function is available by clicking on the '**HELP**' icon or by pressing the <F1> function key. Help text is setup as two layers. By pressing 'F1' at the first field on the screen, an overall description of the master file will be displayed. If 'F1' is pressed at a specific field within the master file, a detailed description of the field and its' use will be displayed.

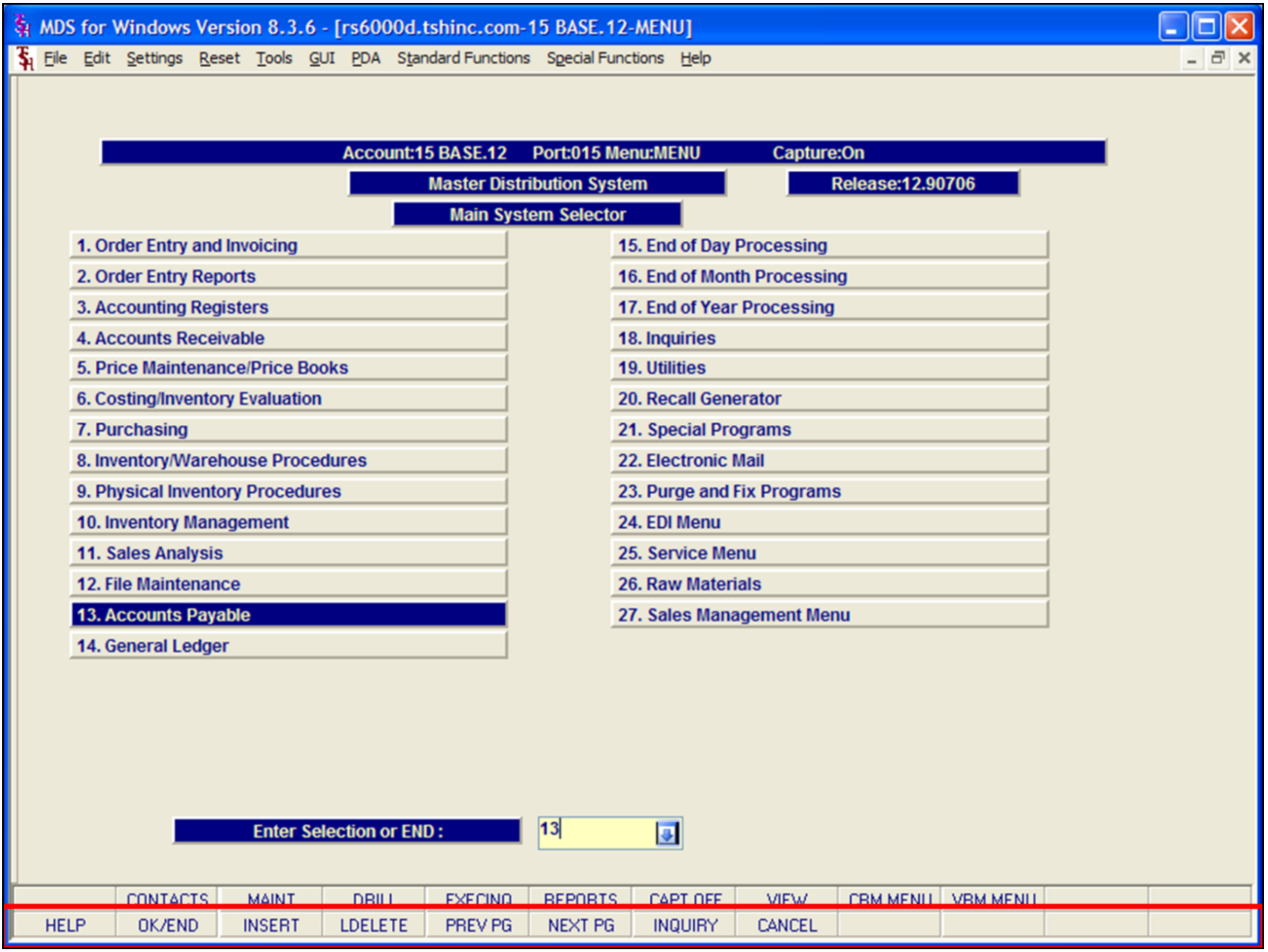
OK/END – The OK/END function is available by clicking on the '**OK/END**' icon, pressing the 'F2' function key, or by typing in the word 'END' and hitting <ENTER>. This function key acts an 'accept' within a program. It will also takes you back a menu within menus.

INSERT – The INSERT function is available by clicking on the '**INSERT**' icon or by pressing the 'F3' function key. The INSERT mode feature allows insertion of letters or numbers into existing text.

LDELETE – The LINE DELETE function is available by clicking on the '**LDELETE**' icon or by pressing the 'F4' function key. The LDELETE function allows you to delete a line from the master file. Simply bring the cursor to the line you wish to delete, and click or press 'F4'.

PREV PAGE – The PREVIOUS PAGE function is available by clicking on the '**PREV PG**' icon or by pressing the 'F5' function key. This function would be used for master files which contain multiple input screens, and will allow easy paging to additional screens. This function will be used simultaneously with the NEXT PG function to move back and forth between the screens.

NEXT PG – The NEXT PAGE function is available by clicking on the '**NEXT PG**' icon or by pressing the 'F6' function key. This function would be used for master files which contain multiple input screens and will allow easy paging to additional screens. This function can be used simultaneously with the PREV PG function to move back and forth between the screens.



Notes:

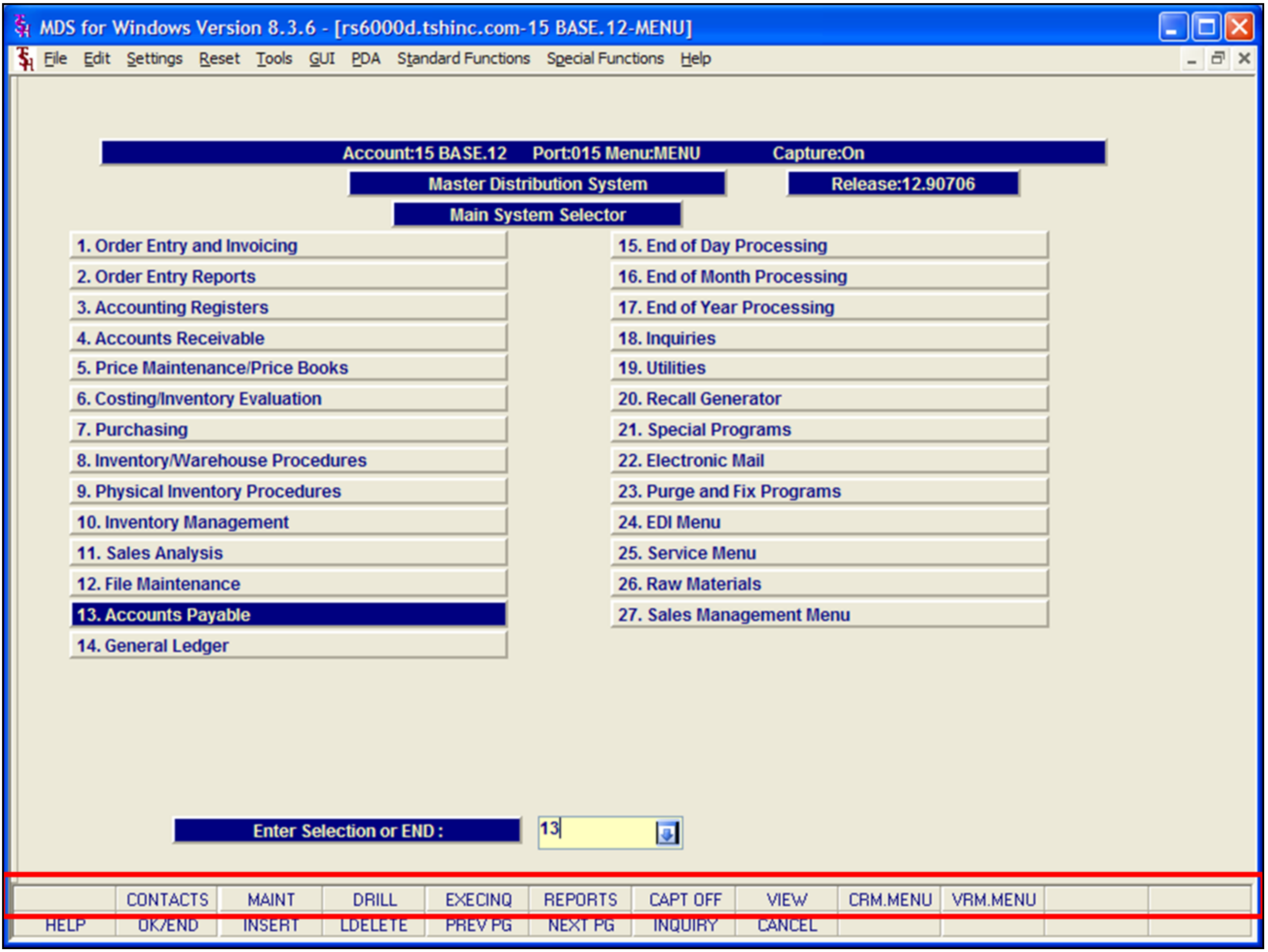
Master File Maintenance Function Keys

INQUIRY – The INQUIRY function is available by clicking on the **'INQUIRY'** icon or by pressing the 'F7' function key. This function allows the operator the flexibility to display items in the master file already entered and to display other master files used within the file being created. Example: The Product Master file. At the first prompt for product number, if the operator clicks on the **'INQUIRY'** icon or 'F7' is pressed the inquiry can be made to display products on file (to eliminate duplication). If you click on the **'INQUIRY'** icon or press the 'F7' function key at another field, for example, product type (which is another master file) the system will display product types on file to help the operator in selecting which product type best fits the product being created. As you can see the inquiry function can be a very useful tool when creating or maintaining master files.

CANCEL – The CANCEL function is available by clicking on the **'CANCEL'** icon or by pressing the 'F8' function key. This function is used to end a program without applying changes or additions made and should only be used if you DO NOT want the changes to be updated to the file. If used, the record will be filed as it was before the operator accessed it, in other words, as though no changes were made.

Off – The Off function is available by clicking on the **'Off'** icon or by pressing the 'F9' function at any menu. This function will disconnect your session from WinMDS.

Popup – The Popup function is available by clicking on the **'Popup'** icon or by pressing the 'F12' function key. This function will bring up a custom menu with personally specified menu options.



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Master File Maintenance Function Keys

The top row function keys on your keyboard <Shift>+(F1-F8) are reserved for special functions in the MDS master file maintenance programs.

These function keys change in each of the programs that you are in. For example, Product File Price Maintenance's top row of function keys will be different than Batch Price Changes – by Vendor's top row of function keys.

CONTACTS - The CONTACTS function is available by clicking on the **'CONTACTS'** icon or by pressing the Shift+'F2' function key. This will bring the user to the Contacts inquiry.

MAINT - The MAINTENANCE function is available by clicking on the **'MAINT'** icon or by pressing the Shift+'F3' function key. This will bring the user to the File Maintenance menu.

DRILL - The DRILL function is available by clicking on the **'DRILL'** icon or by pressing the Shift+'F4' function key. This will bring the user to the Drill Down menu.

EXECINQ - The EXECUTIVE INQUIRY is available by clicking on the **'EXECINQ'** icon or by pressing the Shift+'F5' function key. This will bring the user to the Executive Inquiry.

REPORTS – The REPORTS module is available by clicking on the **'REPORTS'** icon or by pressing the Shit+'F6' function key.

CAPT OFF - The CAPTURE OFF function is available by clicking on the **'CAPT OFF'** icon or by pressing the Shift+'F7' function key. This will disable all available reports from going to Report Capture.

VIEW - The VIEW function is available by clicking on the **'VIEW'** icon or by pressing the Shift+'F8' function key. This will forward the user to Report Capture and display all reports previously ran.

CRM.MENU – The CRM.MENU function is available by clicking on the **'CRM.MENU'** icon or by pressing the Shift+'F9' function key. This will forward the user to the Customer Relationship Management menu.

VRM.MENU – The VRM.MENU function is available by clicking on the **'VRM.MENU'** icon or by pressing the Shift+'F10' function key. This will forward the user to the Vendor Relationship Management menu.

Notes

CRM Benefits:

- MDS CRM allows you to:
  - Import Prospect Contact Information
  - First Contact/Classification
  - Tracking Communication
  - Follow through to Close
  - Custom Reports
  - Key Performance Indicator

Notes:

CRM Parameter File

Before using MDS , your account analyst will set the following AR parameters.

We mention them here so you are familiar with them and their various effects on the AR module.

AR Related Parameter Records:

14. DUN.PERIOD - Aging period dunning cycle should begin (1-6).

15. COMM - Commission parameter based on sales (S) or gross profit ("Null").

16. COMM.FRT - Indicates if actual freight should be subtracted from the commissionable amount (Y - subtract, N or Null - do not subtract).

86. AR.HIST.DYS - Number of days to retain AR.HIST records.

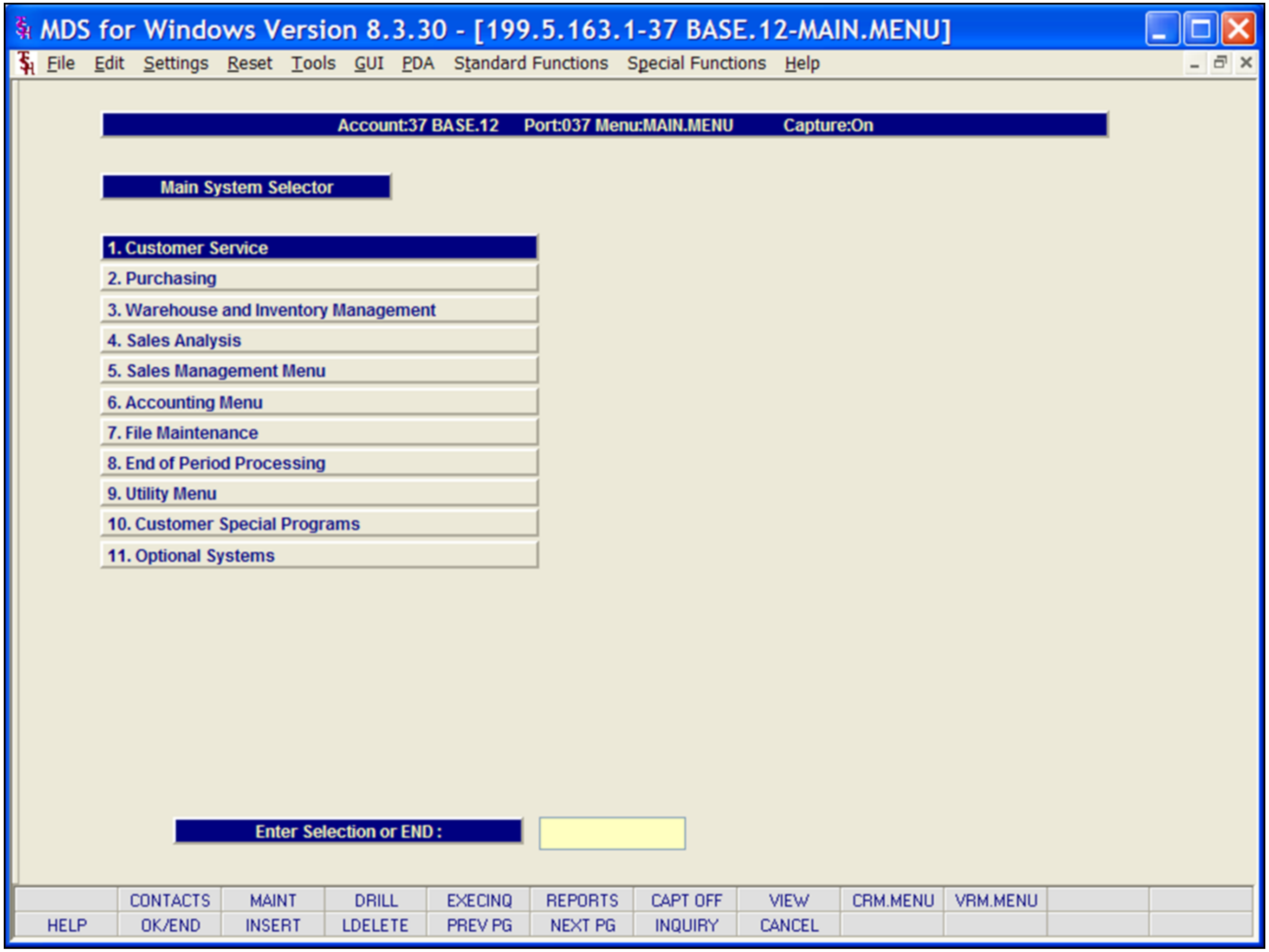
107. COMM.PD.AR- PAID COMMISSIONS OPTION: 0 OR NULL - no commissions by PAID AR, 1 - commissions based on PAID AR (Update Open.Commission File)

119 CRED.CARD.IND   CREDIT CARD MODULE INDICATOR
I - Interactive Mode
N - Not Used

126. AR.CHECK.REC - AR DEPOSIT RECONCILIATION
Y - WILL USE AR.RECON FILE
N - WILL NOT USE THE AR DEPOSIT RECON

139. AR.AGE.BUCKET.USED- Aging bucket to use for A/R Overdue report.

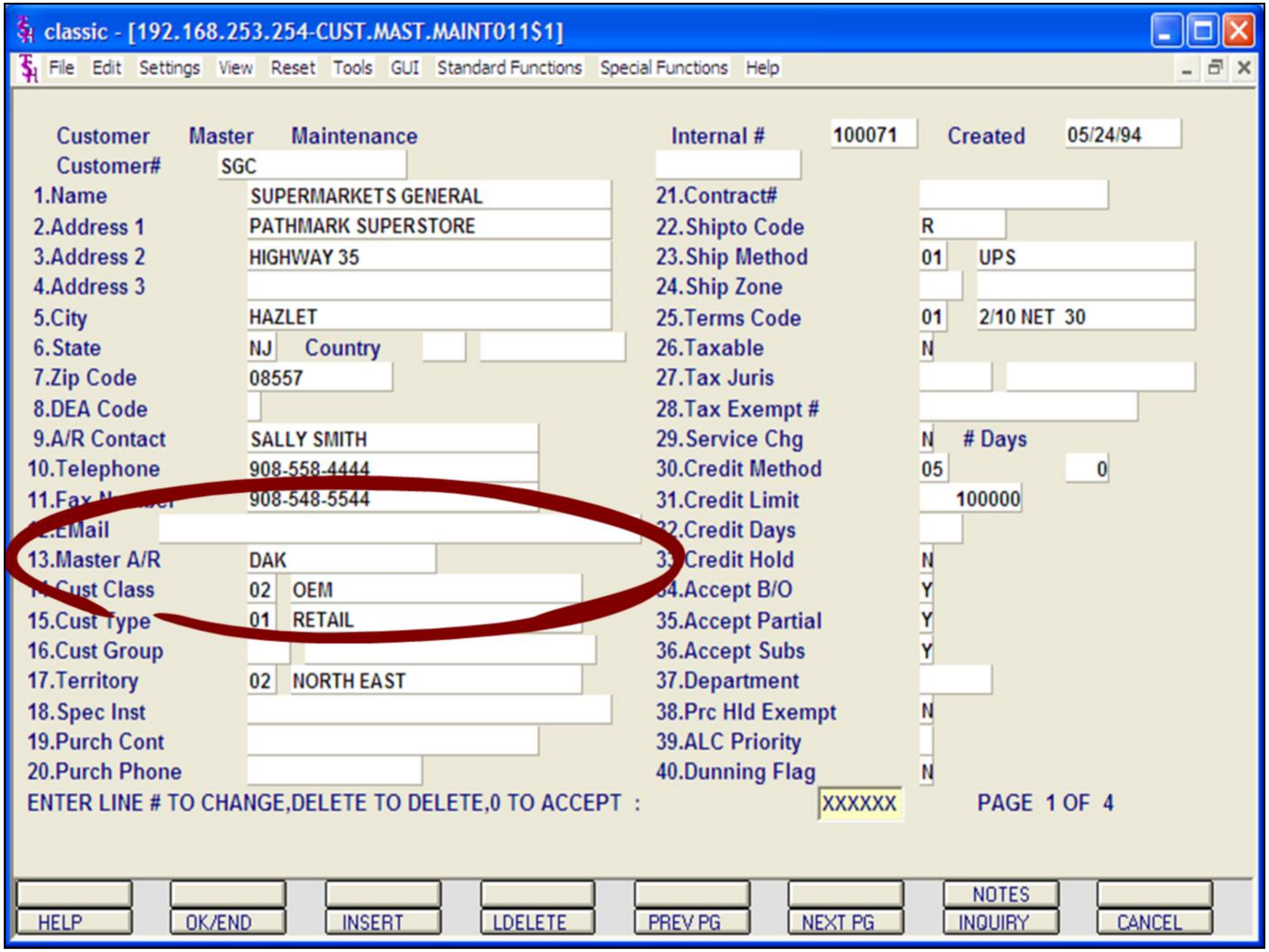
NOTE: There are many Parameter files that affect the entire MDS system. These files are reviewed and set with your analyst prior to going live.



Main System Selector

From the main system selector go into Accounting Menu, Accounts Receivable and then Customer Relationship Management.

Notes:

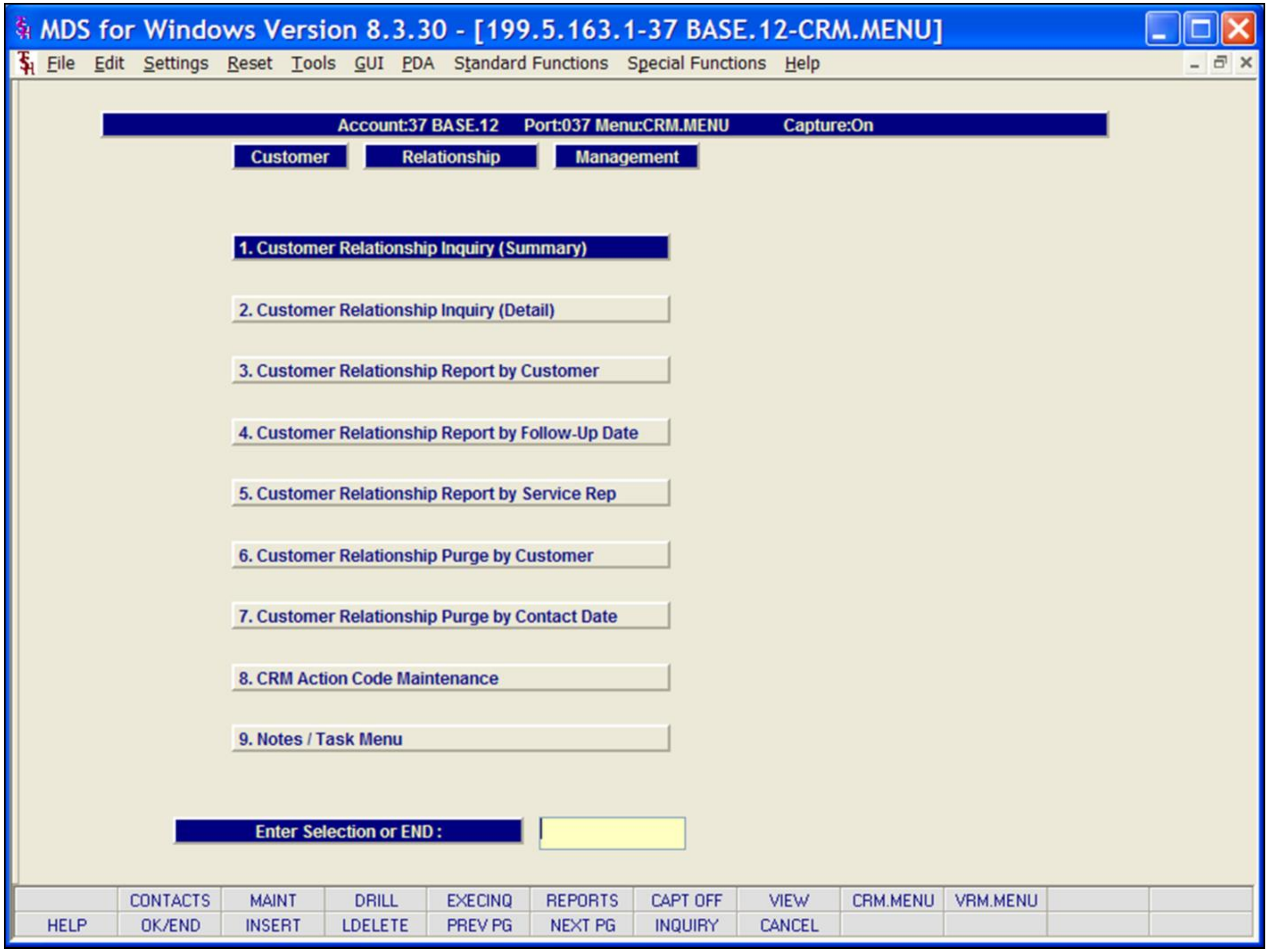


Customer Master Maintenance

From the main system selector go into File Maintenance Menu, Customer Related Files Menu and then Customer Master Maintenance.

Master A/R - If A/R transactions generated by this account are to be posted to a customer's central billing office, or to a parent company, the customer ID of the central office or parent is entered here. The customer ID entered must already exist on the Customer Master file. This field is located in Customer Master Maintenance.

Notes:

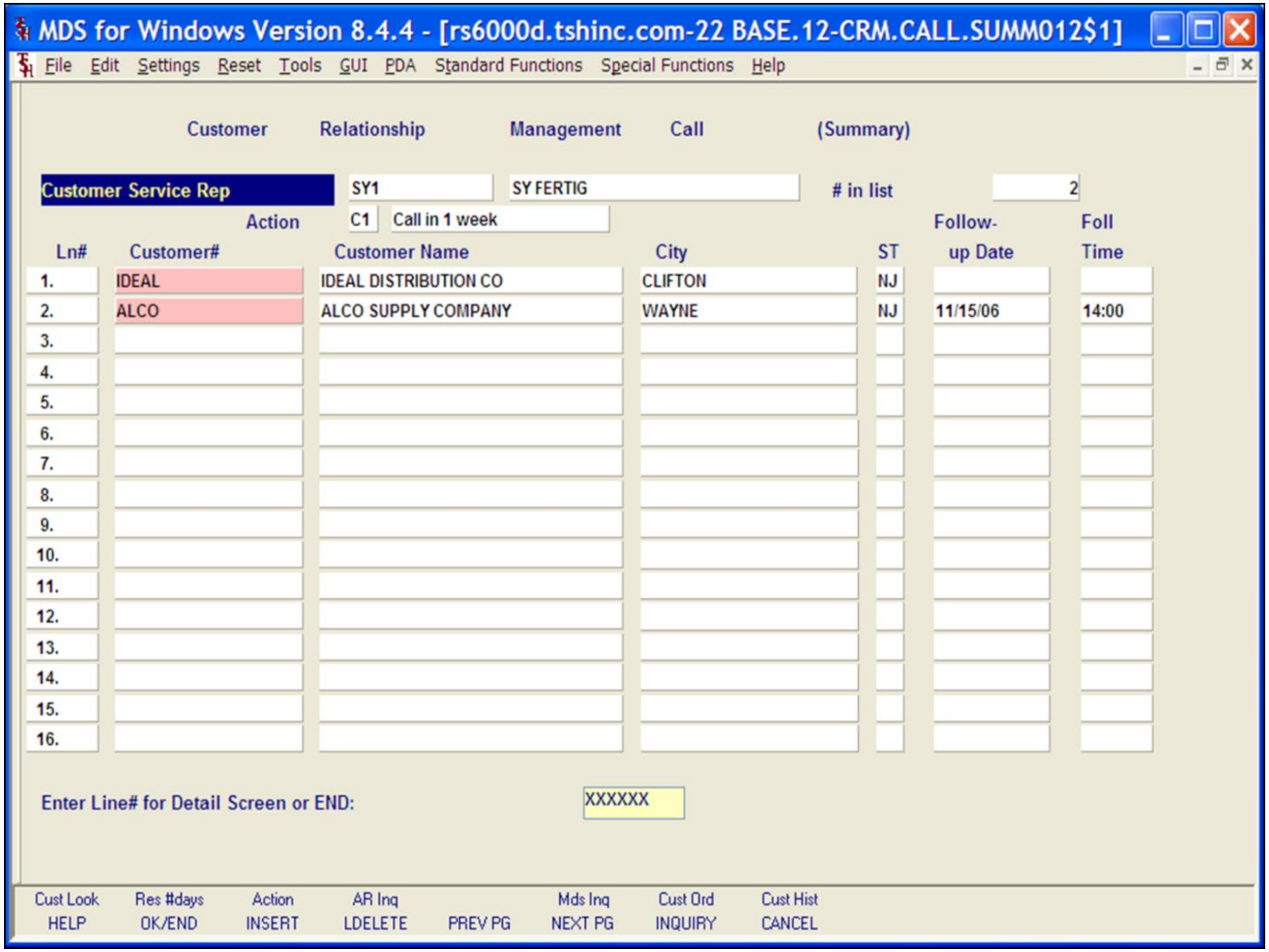


Main System Selector

From the Main System Selector go into Accounting Menu, Accounts Receivable and then Customer Relationship Management.

The CRM main menu includes all the phases of CRM- the summary inquiry, the detail, reports, purges maintenance and notes.

Notes:



Notes:

Customer Relationship Inquiry (Summary)

From the main System Selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Customer Relationship Inquiry (Summary).

Customer Service Rep – Enter code for appropriate customer service representative.

Action – Enter the action code or click 'INQUIRY' to select from a list of action codes.

 # in list – number of files for this customer service rep and Action code will appear here.

Ln# - Line number

Customer# - Customer number is displayed

Customer Name – Corresponding customer name is displayed

City – Corresponding city for customer's address is displayed.

ST – Corresponding state for customer's address is displayed.

Follow-up Date – Latest follow-up date for this customer is displayed.

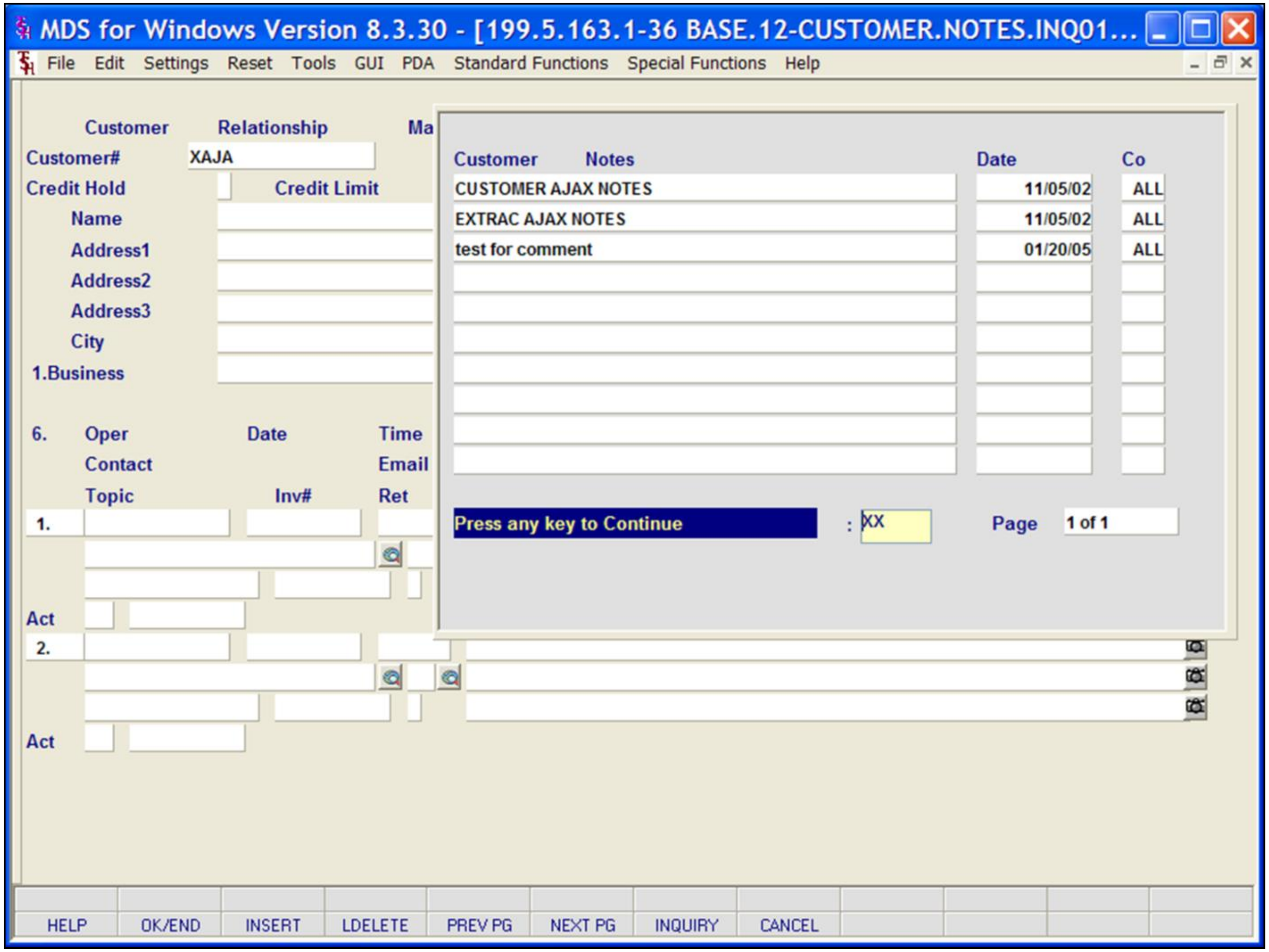
Foll Time – Follow-up time is displayed.

Enter Line# for Detail Screen or END:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to see detail information.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.



Customer Relationship Management Call (Detail)

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Customer Relationship Inquiry (Detail).

Customer# - Enter the customer number. You can enter the customer number or part of the customer number, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the correct customer.

After acceptance of customer code, active accounts receivable customer notes will appear.

Customer Note – Customer notes are 1 line per message. Notes appear here.

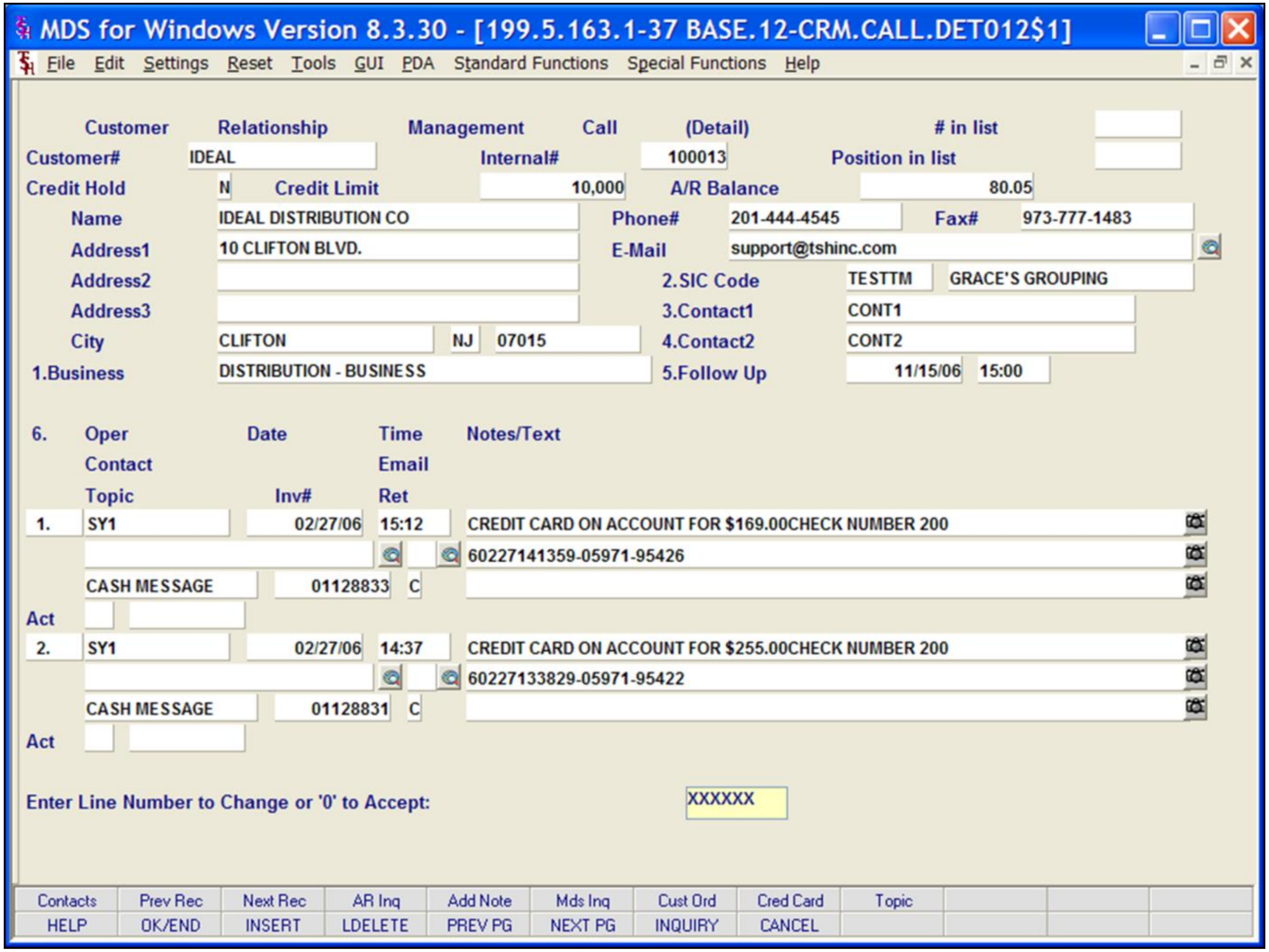
Date – Corresponding date for customer note is displayed here.

Co – Corresponding company number for customer note appears here.

Press any key to continue:

Hit <ENTER> or any key to accept this screen and continue.

Notes:



Notes:

Customer Relationship Inquiry (Detail)

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Customer Relationship Inquiry (Detail).

Internal# - The corresponding internal customer number is displayed.

 # in list – If a selection list is being used, the number of items in the current list is displayed.

Position in List – If a selection list is being used, the position of this customer in the list is displayed.

Credit Hold – Customer credit hold flag Y- customer is on credit hold, N – customer is not on credit hold.

Credit Limit – Customer's credit limit is displayed.

A/R Balance- Customer's current AR balance is displayed.

Name – Customer name is displayed

Address 1-3 – Address lines 1-3 for customer is displayed.

City (State, Zip) – City, state code and zip for customer are displayed.

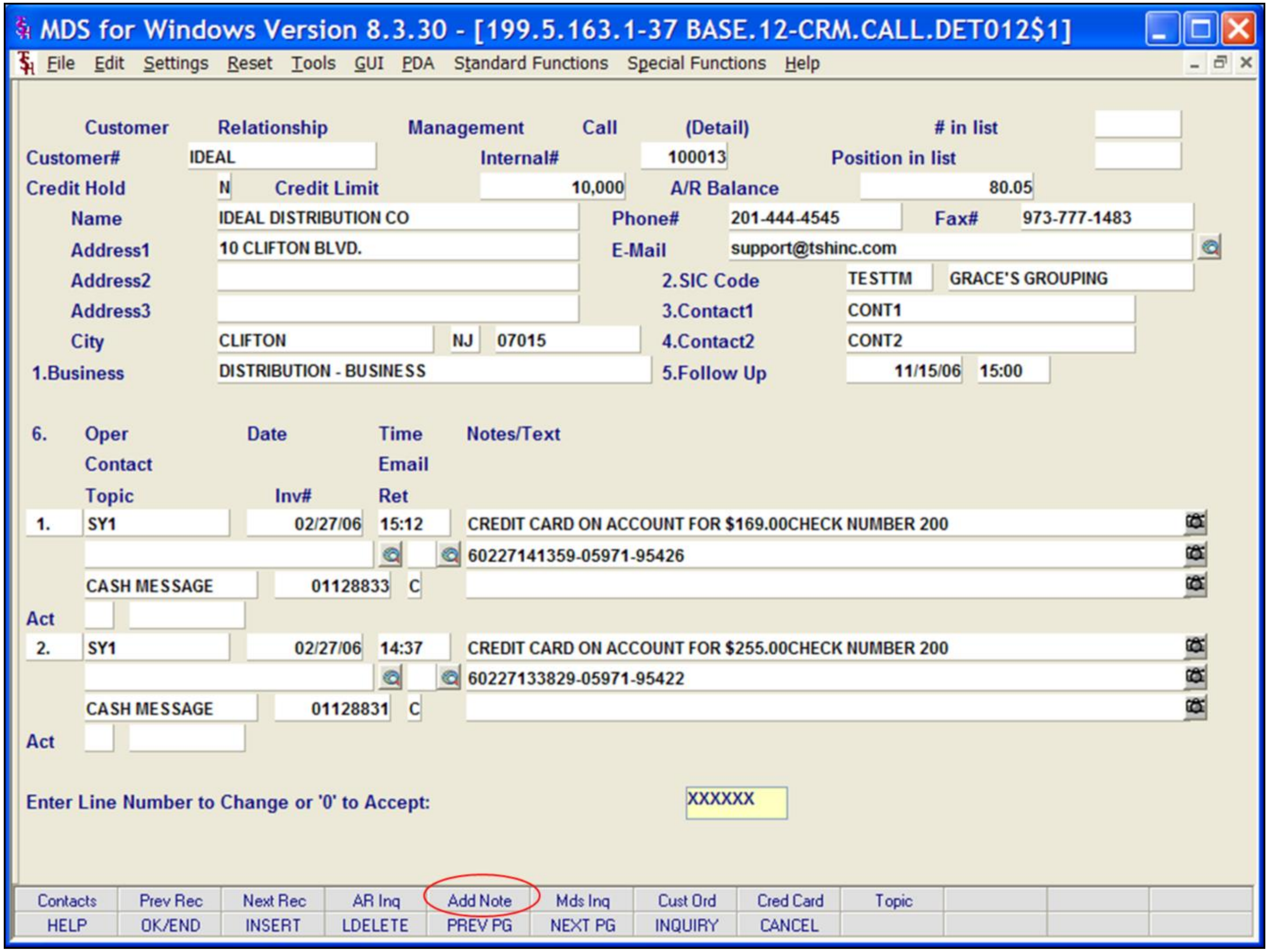
Phone# - Customer's phone number is

displayed.

Fax# - Customer's fax number is displayed.

E-Mail – Customer's email is displayed.

Notes



Customer Relationship Inquiry (Detail)

SIC Code – SIC code assigned to this customer is displayed along with the corresponding description.

Contact1 – First contact for this customer.

Contact2 – Secondary contact for this customer.

Follow Up – Follow-up date and time is displayed.

The next text fields go together and relate to the customer notes.

To add a new note click '**AddNote'** function key or type CTRL-F5.

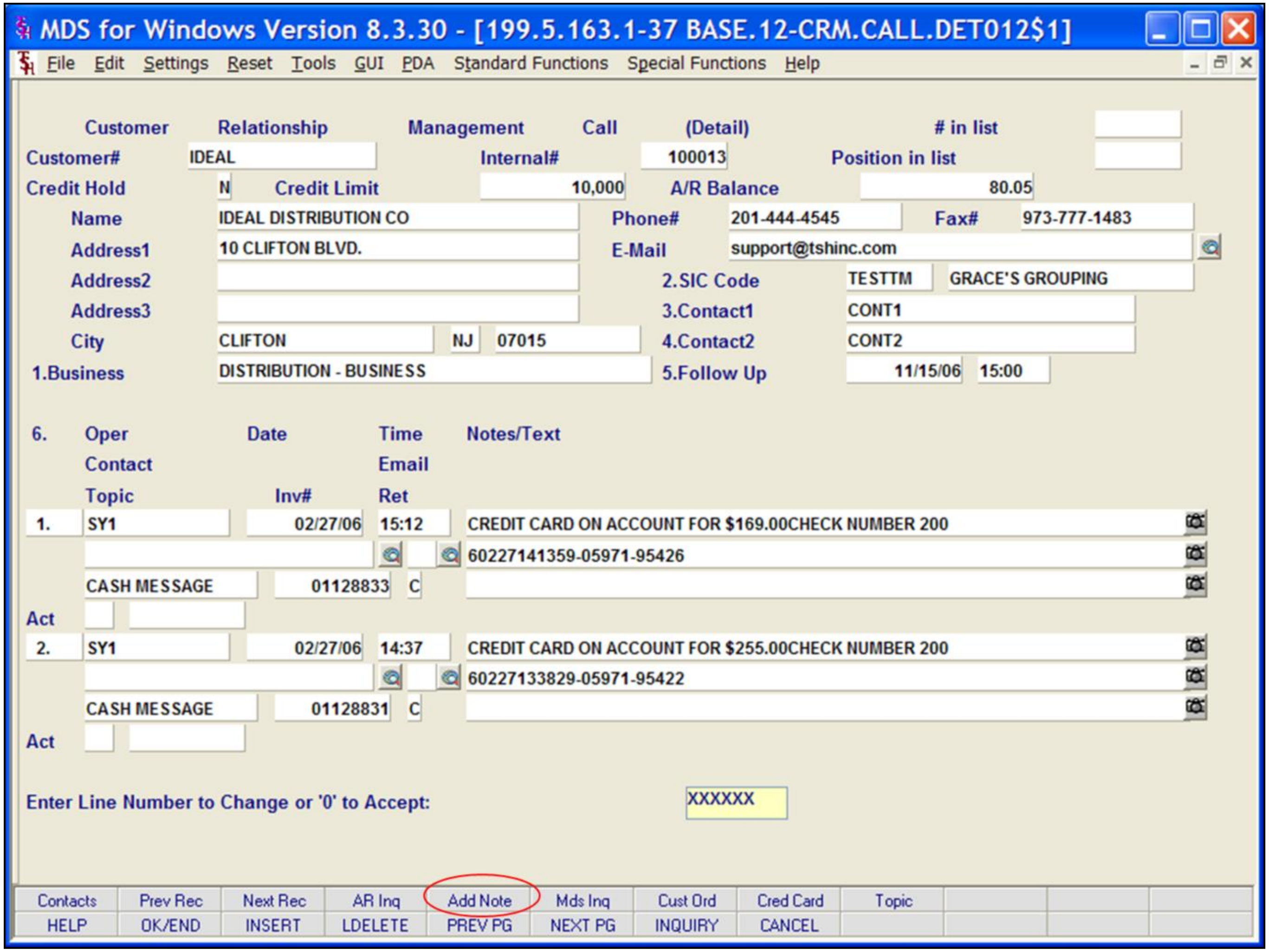
Oper – Operator code is displayed.

Date – Corresponding date is displayed.

Time – Corresponding system time for note entry is displayed.

Notes/Text – Customer note is displayed here.

Notes:



Notes:

Customer Relationship Inquiry (Detail)

Contact – Customer note contact (if entered) is displayed here.

Email – Send email button and email confirmation button.

Topic – Topic entered for this note is displayed.

Inv# - Corresponding invoice number (if applicable) is displayed here.

Ret – The corresponding Retain Code is displayed here. Options are: Y for Yes, N for No, or C for Cash Message.

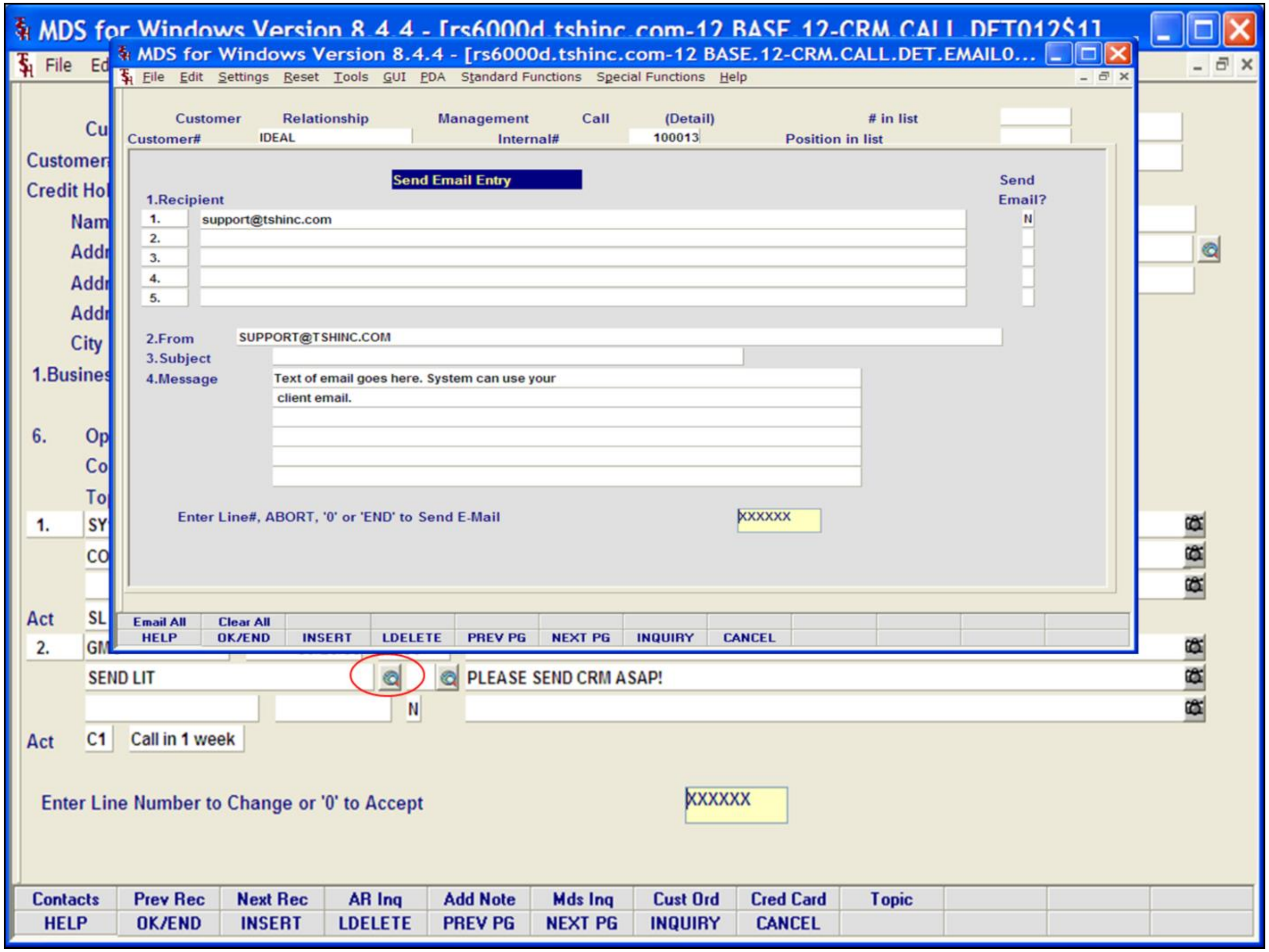
Act – The corresponding Action Code is displayed here. Note: Action codes are defined by your system manager an therefore will be different for every MDS system.

Enter Line Number to Change or '0' to Accept:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.



Notes:

Customer Relationship Inquiry (Detail) Email

Email – Right click in first email button to display the email screen. Users can send emails directly from this screen.

Recipient – Emails on file for this customer are displayed. Users can enter an email address here.

Send Email? – If multiple emails are listed, change flag to "Y" for those recipients who should receive the email.

From – Enter your email here.

Subject – Enter subject for email here.

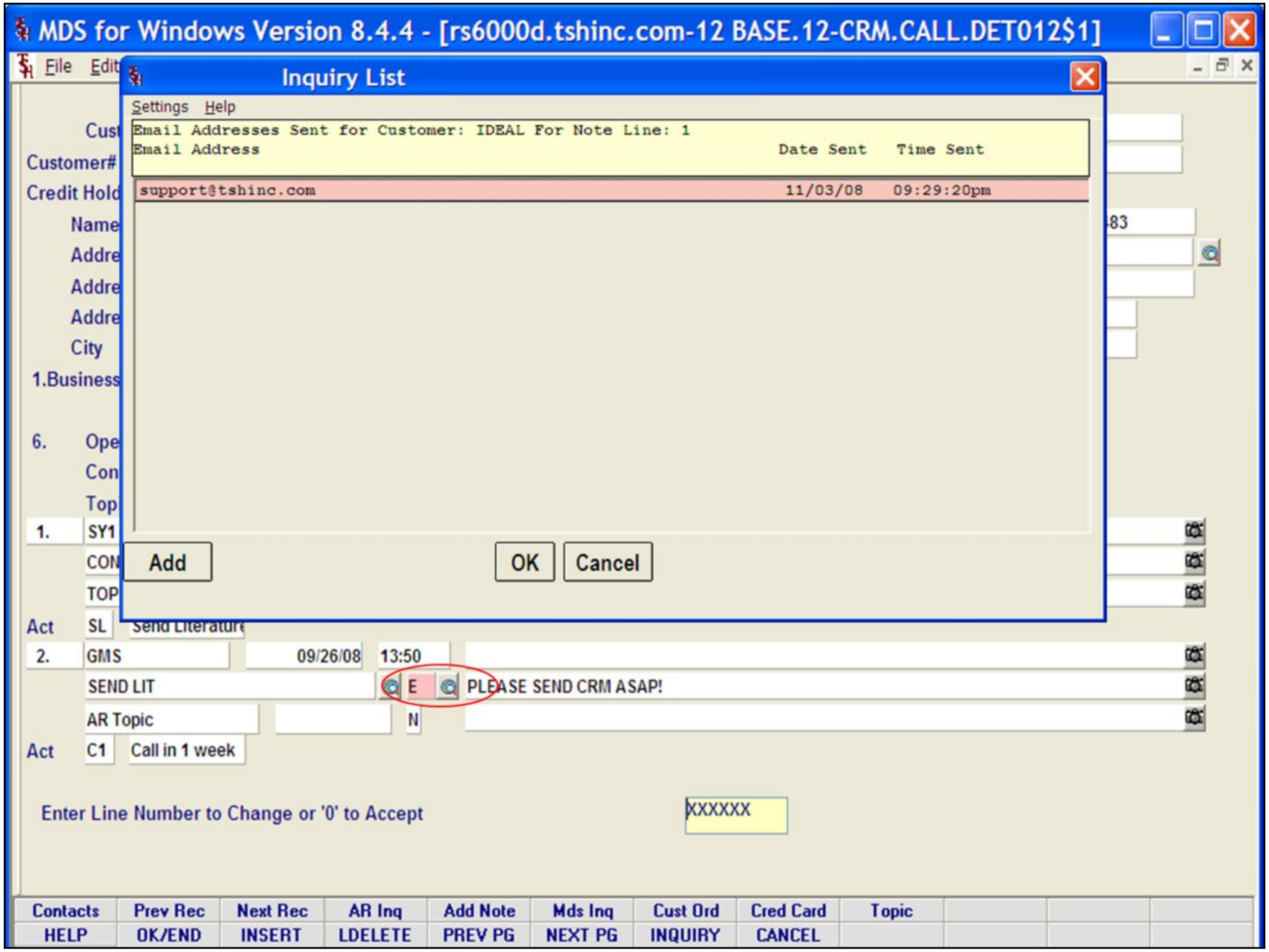
Message – Text of message goes here.

Enter Line#, ABORT, "0" or 'END' to Send E-Mail:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to send this email message.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.



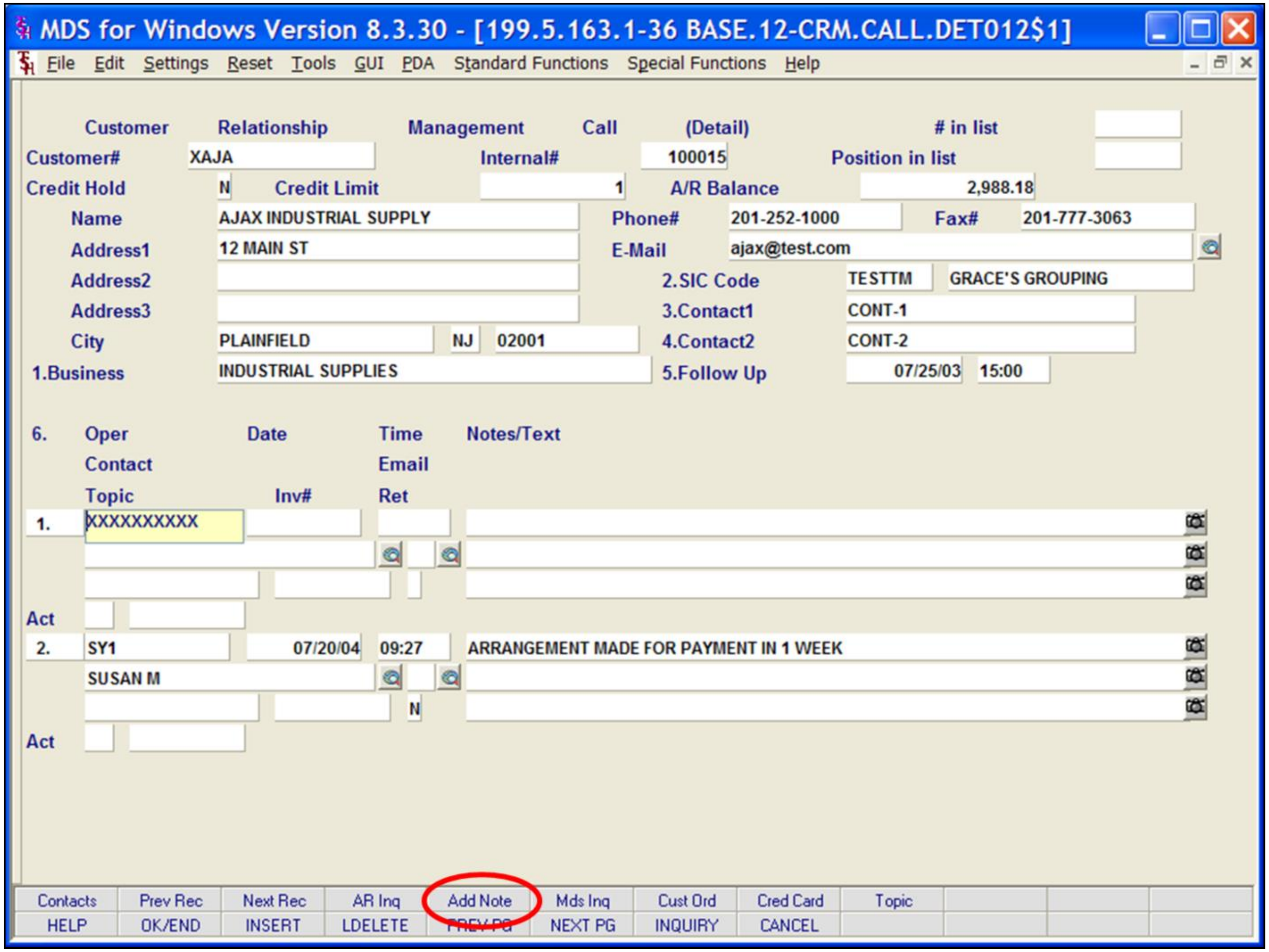
Customer Relationship Inquiry (Detail)

Second Email Button

Email Confirmation – After an email has been sent, users can click the second email button to display the email screen. This displayed the Email Confirmation screen which lists all emails sent

Click on the 'OK' button to accept this entry and return to the Customer Relationship Management Call Detail screen.

Notes:



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Customer Relationship Management Call (Detail)

Add Note Function

The bottom nine fields on this screen go together and relate to the customer notes. To add a new note click on the '**Add Note**' icon or press the Shift+ 'F5' function key.

Oper – Hit ENTER for your operator code.

Date – Hit ENTER for today's date or Click on the drop down box and select a date or enter date.

Time – Hit ENTER for current time or enter time.

Notes/ Text – Enter Note text here. The MDS editor box will be activated for editing the text.

Contact – Enter contact name here.

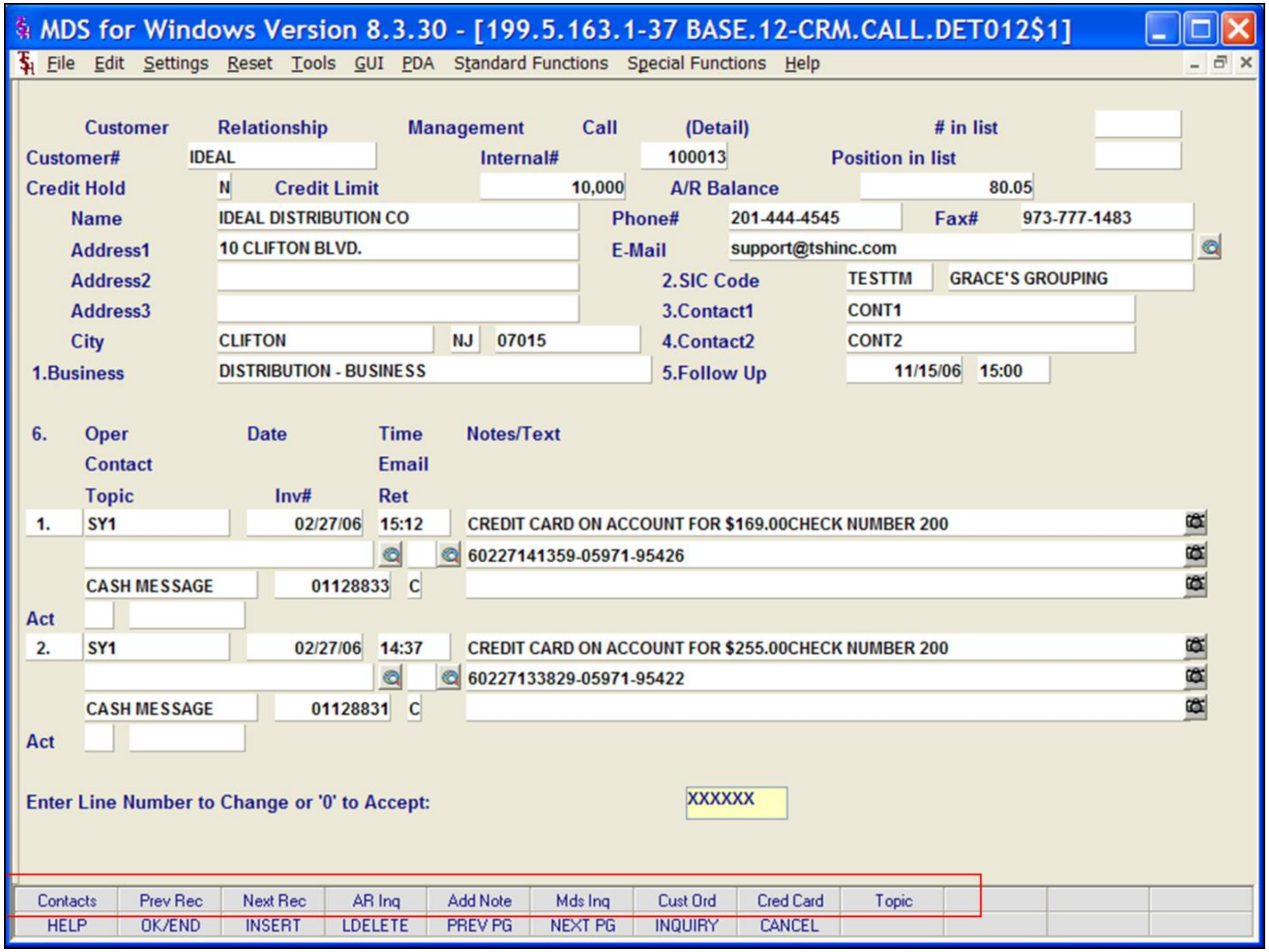
Email – Send email button and email confirmation button. The first button pops up the email screen to send a e-mail. The second button displayed a confirmation after the message is sent.

Topic – Enter topic for note here.

Inv# - Enter invoice number here (if applicable).

Ret - Retain code: Enter Y for Yes N for No or C for Cash Message.

Act – Action code- Enter action code or click 'INQUIRY' to select a code from the Action Code drop down.



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Customer Relationship Management Call (Detail)

Function Keys

Contacts – The Contacts function is available by clicking on the 'Contacts' icon or by pressing the Shift+ 'F1' function key. This will bring the user to the Customer Contacts Inquiry.

PrevRec - The PrevRec function is available by clicking on the 'PrevRec' icon or by pressing the Shift+ 'F2' function key. This will bring the user back to the Previous Record in the CRM select list.

NextRec - The NextRec function is available by clicking on the 'NextRec' icon or by pressing the Shift+ 'F3' function key. This will bring the user to the Next Record in the CRM select list.

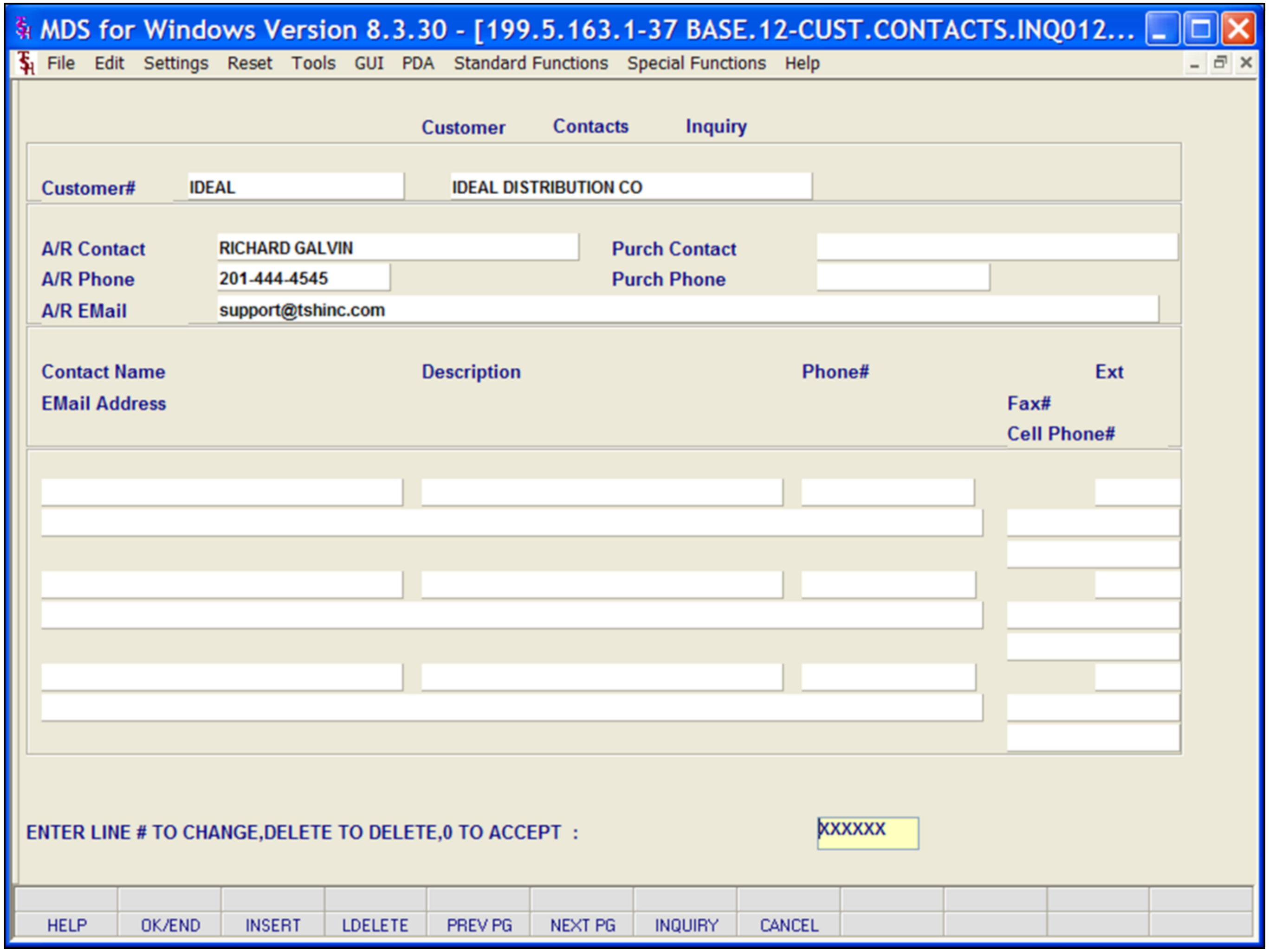
AR Inq - The AR Inq function is available by clicking on the 'AR Inq' icon or by pressing the Shift+ 'F4' function key. This will bring the user to the Accounts Receivable Inquiry.

Add Note - The Add Note function is available by clicking on the 'Add Note' icon or by pressing the Shift+ 'F5' function key. This will allow the user to enter a new CRM note using the bottom half of the CRM call detail screen.

MdsInq - The Mds Inq function is available by clicking on the 'Mds Inq' icon or by pressing the Shift+ 'F6' function key. This will bring the user to the MDS Inquiry Screen.

Cust Ord - The Cust Ord function is available by clicking on the 'Cust Ord' icon or by pressing the Shift+ 'F7' function key. This will bring the user to the Customer Order Inquiry.

Cred Card - The Cred Card function is available by clicking on the 'Cred Card' icon or by pressing the Shift+ 'F8' function key. This will bring the user to the Message Board Credit Card Entry screen.



Notes:

Customer Relationship Management Call (Detail)

Contact Function Key

From Customer Relationship Inquiry (Detail) click on the 'Contacts' icon or by press the Shift+ 'F1' function key.

Customer# - The customer number and name will display or you can enter the customer number or part of the customer number, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the correct customer. Customer Code and corresponding customer name are displayed.

A/R Contact – Customer's AR contact is displayed here.

A/R Phone – Phone number for A/R contact is displayed here.

A/R Email – Email for AR contact is displayed here.

Purch Contact – Purchasing contact is displayed here.

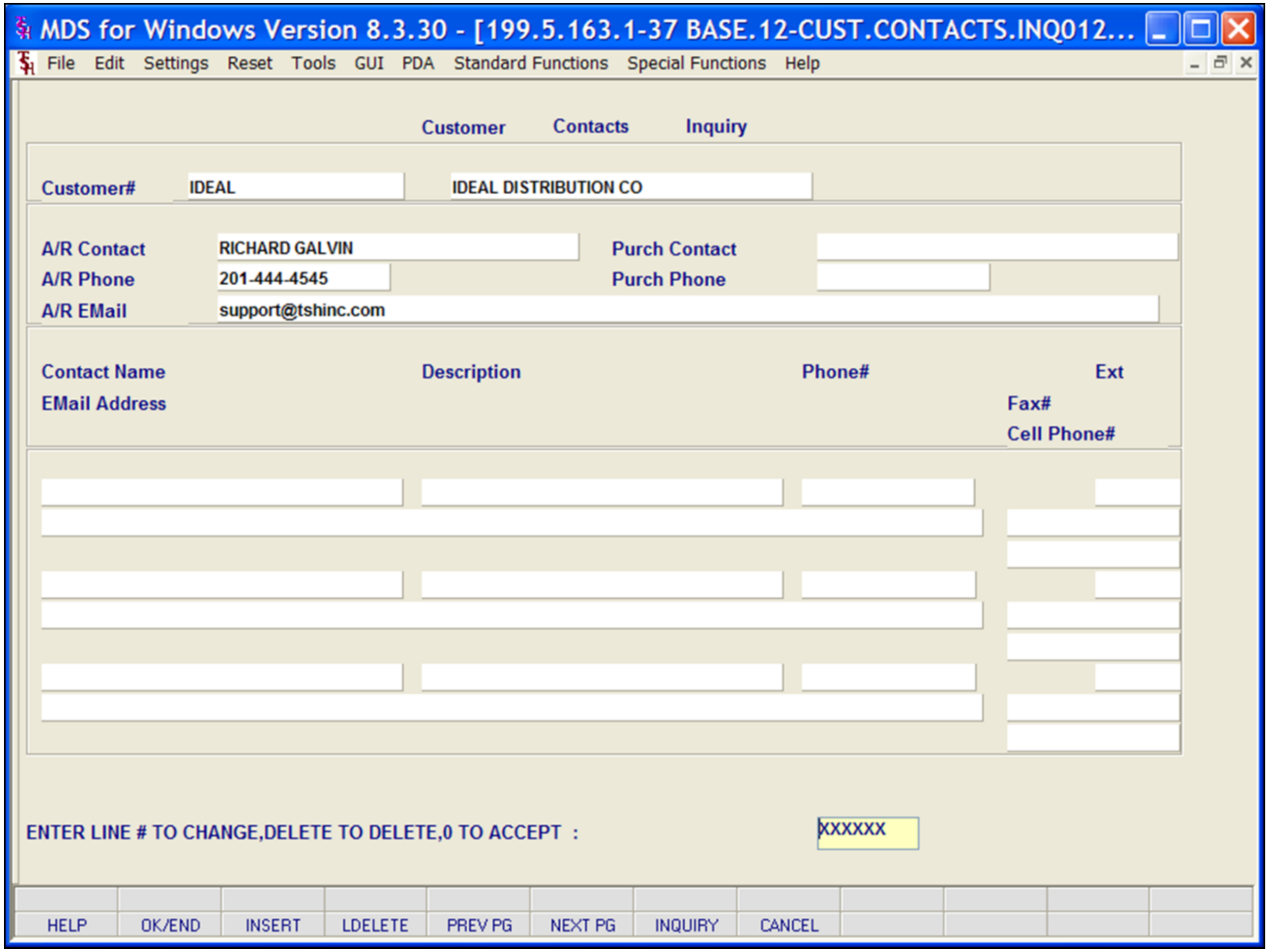
Purch Phone – Purchasing contact's phone number is displayed here.

Contact Name – Additional contact names are displayed here.

Description – Corresponding description for additional contact is displayed here.

Phone# - Corresponding phone number for additional contact is displayed here.

Notes



Notes:

Customer Relationship Management Call (Detail)

Contact Function Key

Ext - Corresponding phone number for additional contact is displayed here.

EMail Address - Corresponding e-mail for additional contact is displayed here.

Fax# - Corresponding fax number for additional contact is displayed here.

Cell Phone# - Corresponding cell phone number for additional contact is displayed here.

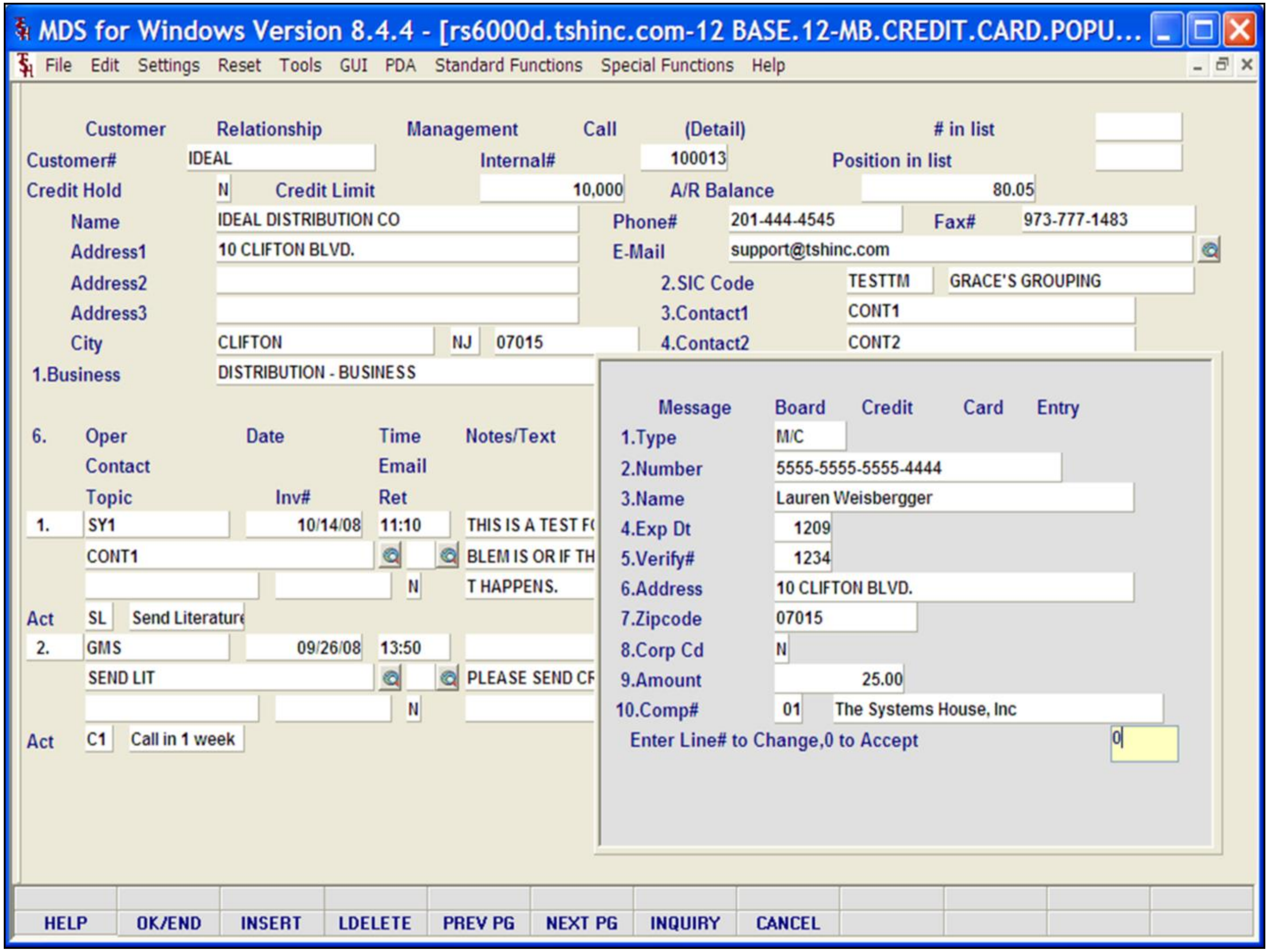
ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by Y*** to delete an existing record.



Notes:

Customer Relationship Management Call (Detail)

Credit Card Function Key

From Customer Relationship Inquiry (Detail) click on the 'Cred Card' icon or by press the Shift+ 'F8' function key.

Type – Enter credit card type or click on the 'INQUIRY' icon to select a credit card type.

Number – Enter credit card number

Name – Enter name as it appears on the credit card.

Exp Dt – Enter the expiration date for the credit card.

Verify# - Enter the verification code.

Address – Enter the billing address for the credit card.

Zipcode - Enter the billing zip code for the credit card.

Corp Cd – Is this card a corporate card? Enter Y for Yes or N for No.

Amount – Enter amount to be charged.

Comp# - Enter company number or click 'INQUIRY' to select from a list of available companies.

Enter Line# To Change, 0 To Accept:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Notes

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DATE: 04 Nov 2008                     CUSTOMER RELATIONSHIP REPORT                     PAGE:    1

CUSTOMER#  CUSTOMER NAME            LINE ENTRY    FOLLOW   INIT CONTACT        ----------------- MESSAGE ----------------- RET
                                         DATE     UP DATE

IDEAL      IDEAL DISTRIBUTION CO       2 09/26/08          GMS  SEND LIT
PLEASE SEND CRM ASAP!

                       N
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO      23 03/14/03          SF                  CREDIT CARD ON ACCOUNT FOR $100.004A25960807    C
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO      22 03/25/03          SF                  CREDIT CARD ON ACCOUNT FOR $200.003A26851311    C
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO       4 02/27/06          SF                  CREDIT CARD ON ACCOUNT FOR $255.00CHECK NUMBE   C
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO       8 02/27/06          SF                  CREDIT CARD ON ACCOUNT FOR $0.00CHECK NUMBER    C
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO       9 02/23/06          SF                  CREDIT CARD ON ACCOUNT FOR $250.00CHECK NUMBE   C
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO       5 02/27/06          SF                  CREDIT CARD ON ACCOUNT FOR $100.00CHECK NUMBE   C
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO      10 02/22/06          SF                  CREDIT CARD ON ACCOUNT FOR $100.00CHECK NUMBE   C
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO      11 10/30/03          SF                  CREDIT CARD ON ACCOUNT FOR $200.00CHECK NUMBE   C
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO       3 02/27/06          SF                  CREDIT CARD ON ACCOUNT FOR $169.00CHECK NUMBE   C
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO      14 07/01/03          SF   CONT1          CREDIT CARD ON ACCOUNT FOR $500.003A31315356    C
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO       6 02/27/06          SF                  CREDIT CARD ON ACCOUNT FOR $10000.00CHECK NUM   C
---------------------------------------------------------------------------------------------------------------------------------

IDEAL      IDEAL DISTRIBUTION CO      13 07/01/03          SF                  CREDIT CARD ON ACCOUNT FOR $700.004A30254241    C
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```

Customer Relationship Report – by Customer

This report shows CRM messages by customer. It lists Customer Number, Customer Name, Line number (for note), Entry Date, Follow Up Date, Initials, Customer Contact Information, Massage and the retain flag.

Customer# - In this field the operator has the option of selecting 'All Customers', 'Customer Range' or 'Specific Customer'.

For Customer Range or Specific Customer enter the customer number.

Oper Initials – In this field the operator has the option of selecting 'All Operators', 'Operator Range' or 'Specific Operator'.

Follow Up Date- In this field the operator has the option of selecting 'All Dates', 'Date Range' or 'Specific Date'.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

Notes:

```
DATE: 04 Nov 2008                    FOLLOW UP REPORT                    PAGE:    1
                                  Service Rep:
                                  FOLLOW UP DATE EQUAL TO: 11/13/09

                                    CONTACT  FOLLOW
CUSTOMER#  CUSTOMER NAME            DATE     UP DATE  INIT CONTACT     LINE -----------------COMMENTS-----------------   RET

ANN        ANN'S GARDEN             11/03/09 11/13/09 GMS  Ann           1 she wants a week to think it over
               N

ALCO       ALCO HOLDINGS INC        11/05/09 11/13/00 SY   Kim           1 get credit card for outstanding balance
               N

IDEAL       IDEAL CORP              11/03/09 11/13/00 SY   John          1 will send partial this week
               N

JR         JR CORP                  11/03/09 11/13/00 SY   Seth          1 wants a call in 2 weeks
               N
```

Customer Relationship Report by Follow-Up Date

This report shows CRM notes by follow up date. It lists Customer Number, Customer Name, Contact Date, Follow-up Date, Operator Initials (customer rep) Customer Contact Name and comments. It also shows the retain flag at the end of each line.

Follow Up Date - In this field the operator has the option of selecting 'All Dates', 'Date Range' or 'Specific Date'.

Cust Serv Rep – In this field the operator has the option of selecting 'All Customer Service Reps', 'Customer Service Rep Range' or 'Specific Customer Service Rep'.

Customer# - In this field the operator has the option of selecting 'All Customers', 'Customer Range' or 'Specific Customer'.

For Customer Range or Specific Customer enter the customer number.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

Notes:

DATE: 04 Nov 2008 CRM FOLLOW UP REPORT by Service Rep PAGE: 1
Service Rep: ALL
FOLLOW UP DATES: ALL

CUSTOMER#	CUSTOMER NAME	CONTACT DATE	FOLLOW UP DATE	INIT	CONTACT	LINE	COMMENTS	RET
1020	COLUMBIA*PRESBYTERIAN	11/03/08	11/02/08	SF	TOM	1	SENDING SALES POWERPOINT	N
ANN	ANN'S GARDEN	11/03/08	11/03/08	GMS		1	she wants a week to think it over	N
APB	APB DISTRIBUTING, INC	07/10/08	04/01/08	SF		1	CREDIT CARD ON ACCOUNT FOR $556.67	N
CONNIE	CONNIE'S SUPPLY	09/15/08		SF	JANE	1	NEW CUSTOMER	N
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08		SF		1	CREDIT CARD ON ACCOUNT FOR $100.00 CHECK NUMBER V54A26967547	C
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08		SF		2	CREDIT CARD ON ACCOUNT FOR $133.00 CHECK NUMBER V54A26967400	C
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08		SF		3	CREDIT CARD ON ACCOUNT FOR $333.00 CHECK NUMBER V53A26967241	C
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08		RJ	JANE	4	TEST	C
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08		SF	LAURA	5	CREDIT CARD ON ACCOUNT FOR $277.00 CHECK NUMBER V53A26966988	C
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08		RJ	JOE	6	OVERDUE CHARGING CARD	Y
JR	JULIANNE TEST	11/03/08	11/03/08	SLS	LISA	1	tried to call, call again in 1 week	N
KPL	David's Holding Inc.	12/28/08	12/28/08	KPL	JUNO	1	initial call	N
KPL	David's Holding Inc.	01/20/09	01/13/09	kpl	MARY	2	called for credit card payment	N
MAB	MABIS HEALTH	09/26/08		SF		1	discussed topic	N
MAB	MABIS HEALTH	09/26/08		TEY	THIS ONE	2	follow up call in 1 month	N
MAB	MABIS HEALTH	09/25/08		MAB	AR CONTACT3	3	FINAL ADDITION	N
MAB	MABIS HEALTH	09/19/08		SF	AR CONTACT 2	4	ADDED credit card info to file	N

Notes:

Customer Relationship Follow Up Report by REP

This report shows follow up notes by service rep. it lists Customer Number and Name, Contact date and Follow-up Date, Service rep/ operator initials, Customer Contact, Comment and the Retain flag.

Cust Serv Rep – In this field the operator has the option of selecting 'All Customer Service Reps', 'Customer Service Rep Range' or 'Specific Customer Service Rep'.

Follow Up Date - In this field the operator has the option of selecting 'All Dates', 'Date Range' or 'Specific Date'.

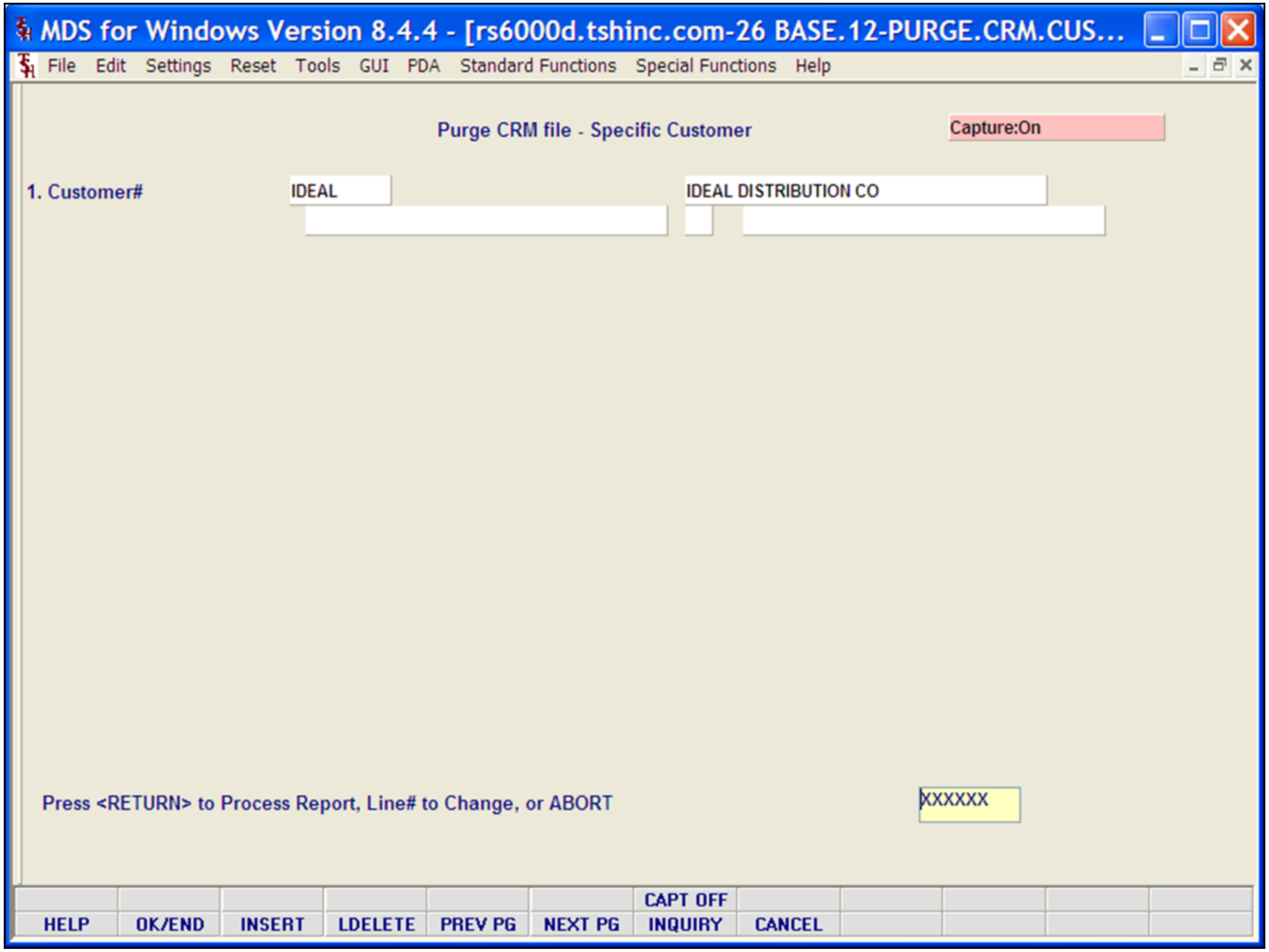
Customer# - In this field the operator has the option of selecting 'All Customers', 'Customer Range' or 'Specific Customer'.

For Customer Range or Specific Customer enter the customer number.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.



Customer Relationship Purge by Customer

This process will delete all notes for the specific customer if the retain flag is set to N .

Customer# **-**Enter the customer number. You can enter the entire customer number or part of it, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the correct customer.

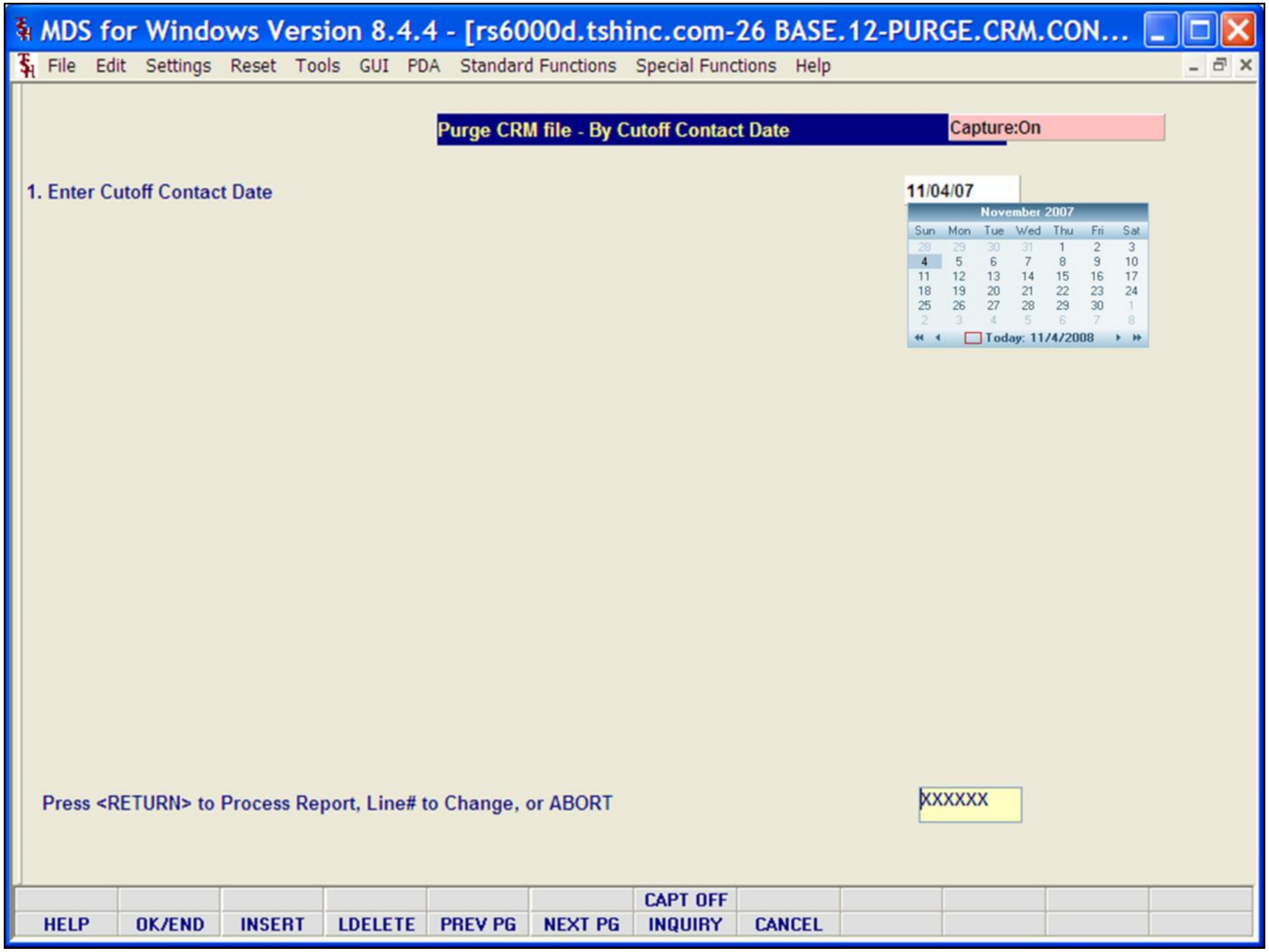
Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to PURGE.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

NOTE: This will purge CRM records for this customer. There is no report produced.

Notes:



Customer Relationship Purge by Contact Date

This process will delete all notes specified by contact date if the retain flag is set to N .

Enter Cutoff Contact Date – Enter the cutoff date for contact for this purge. Click on the drop down box and select a date or enter date format 'DDMMYY'.

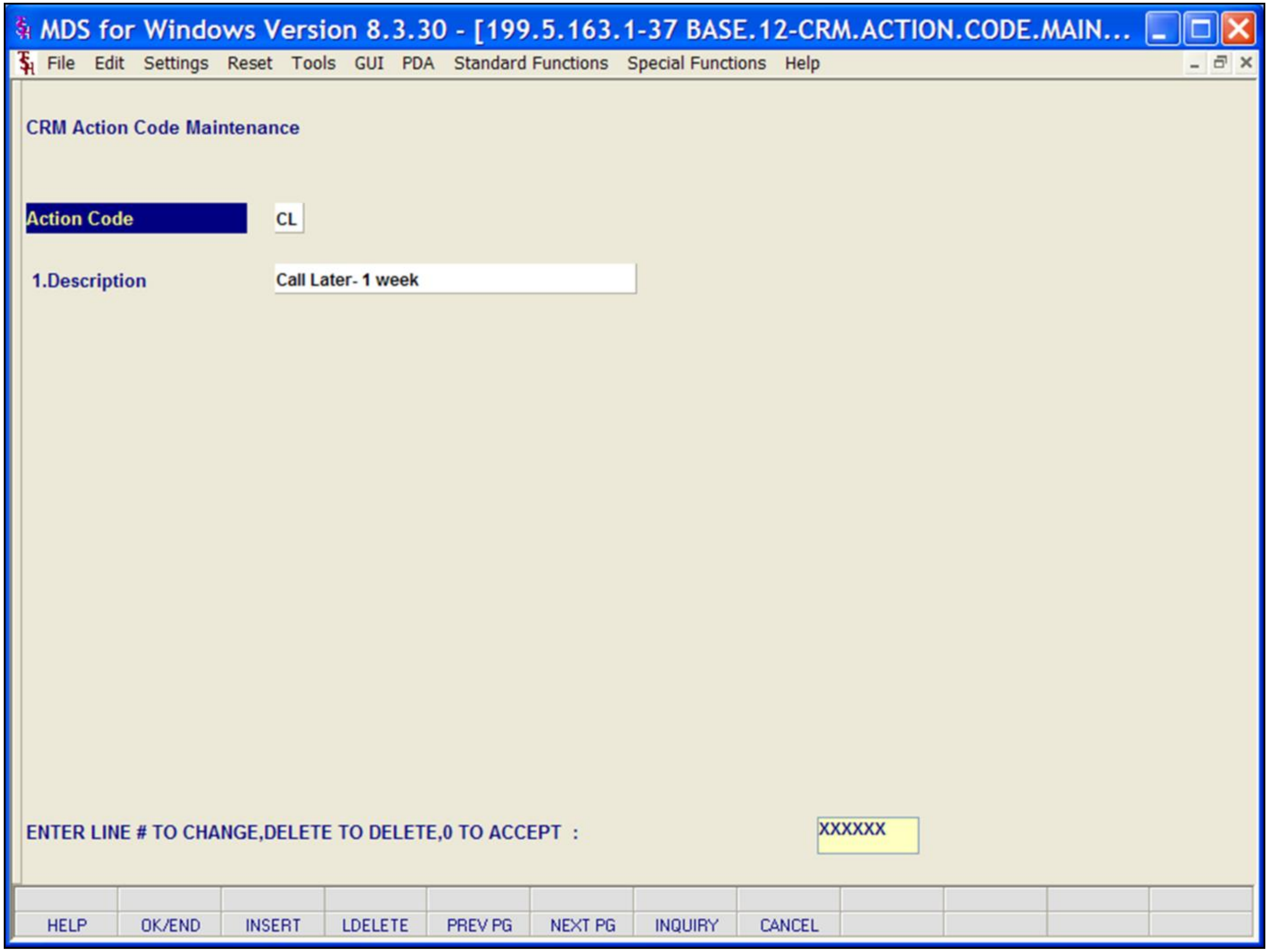
Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to PURGE.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

NOTE: This will purge CRM records for this customer. There is no report produced.

Notes:



Notes:

CRM Action Code Maintenance

This maintenance is utilized to create or maintain action codes.

Action Code – Enter a new or valid action code, you can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu for you to select from the available action codes.

XX not on file, Create it (Y/N) – If it'a a new action code type "Y" to create a new action code.

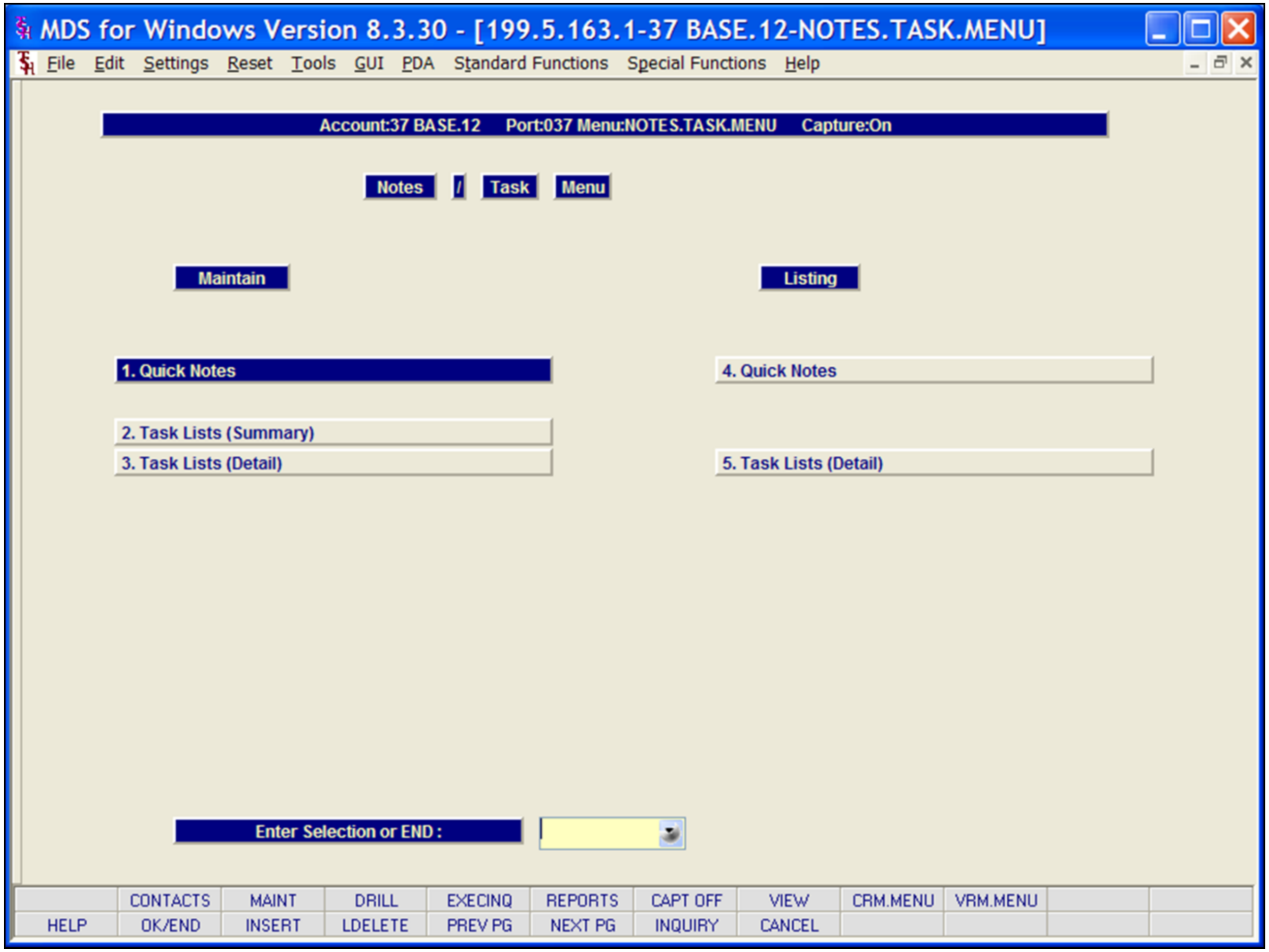
Description – Enter corresponding description for this action code.

ENTER LINE# TO CHANGE, DELETE TO DELETE, '0' to Accept:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

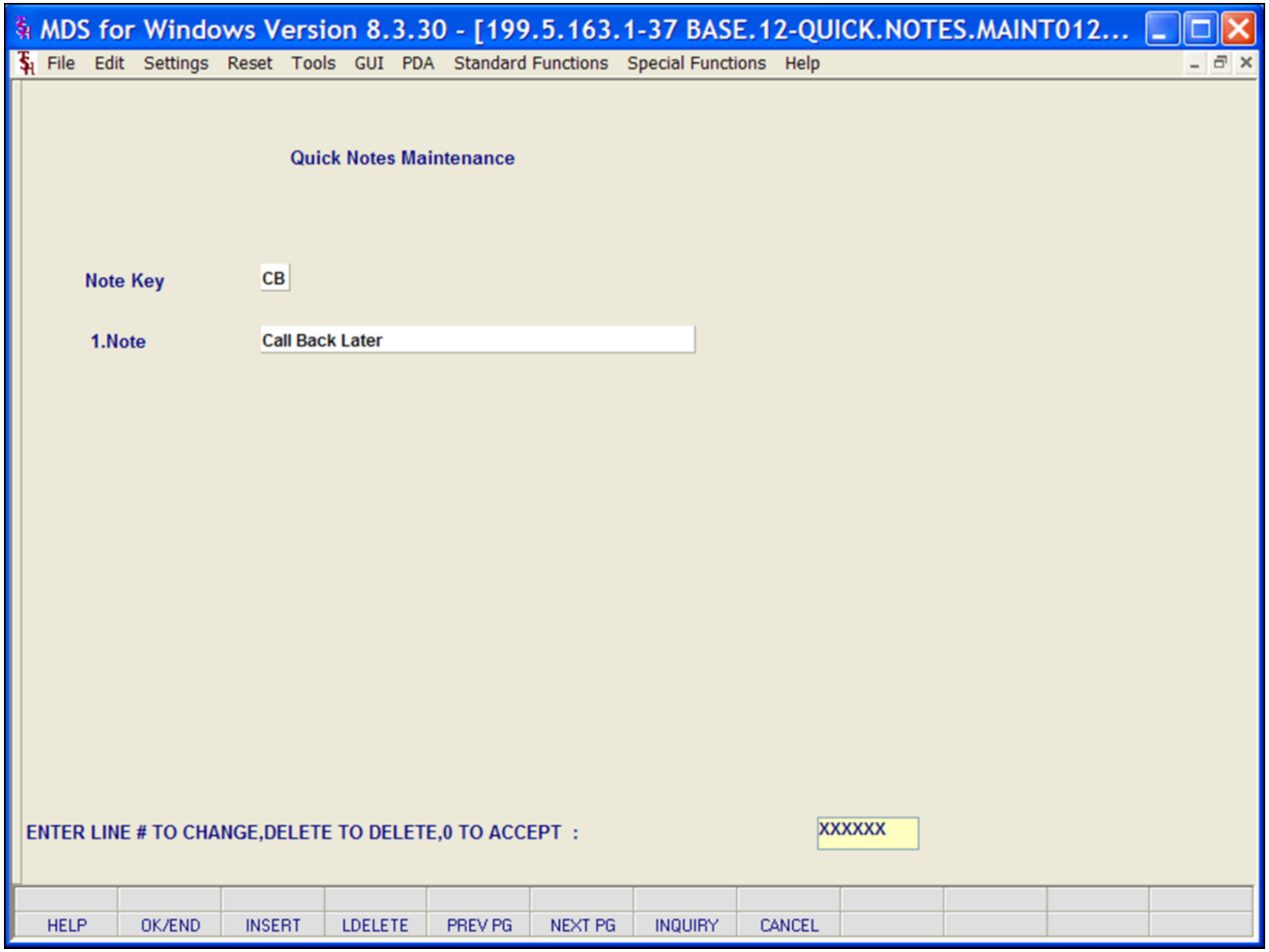
Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.



Notes/ Tasks Menu

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Notes/Task menu.

Notes:



Quick Notes Maintenance

This maintenance is utilized to create or maintain quick notes.

Note Key – Enter the 2 digit Note Key or click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu for you to select from the available note keys.

Note – Corresponding note for this note key will display here.

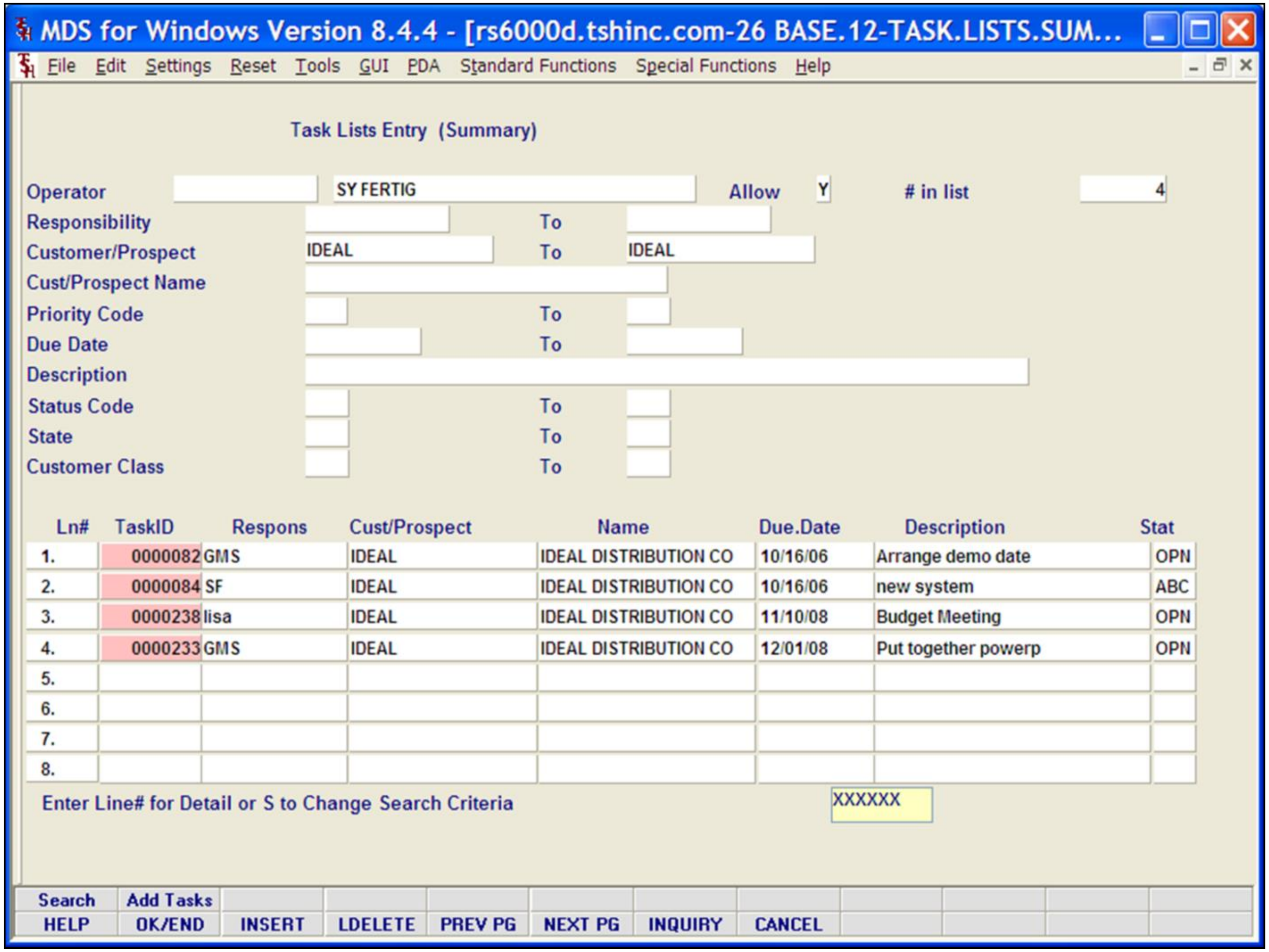
ENTER LINE# TO CHANGE, DELETE TO DELETE, '0' to Accept:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Notes:



Notes:

Task Lists (Summary)

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Notes/Task menu, then Task Lists (Summary).

The system maintains a task list by operator. This inquiry allows you to search tasks by various criteria. Entry of F2 after any search criteria fields will initiate the search with criteria entered to this point. The selected tasks are displayed in summary mode. The operator can then drill down to obtain detailed information on each listed task.

Operator – The current operator entering this this search will be filled in here**.**

Allow – Allow this operator to look at any tasks regardless of which operator is assigned or entered this task? Hit ENTER for default (Y) or enter "Y" for yes or "N" for No. If a Y is entered, at least one search criteria must be entered.

Responsibility (2 fields) – Enter starting and ending name for the person that is responsible.

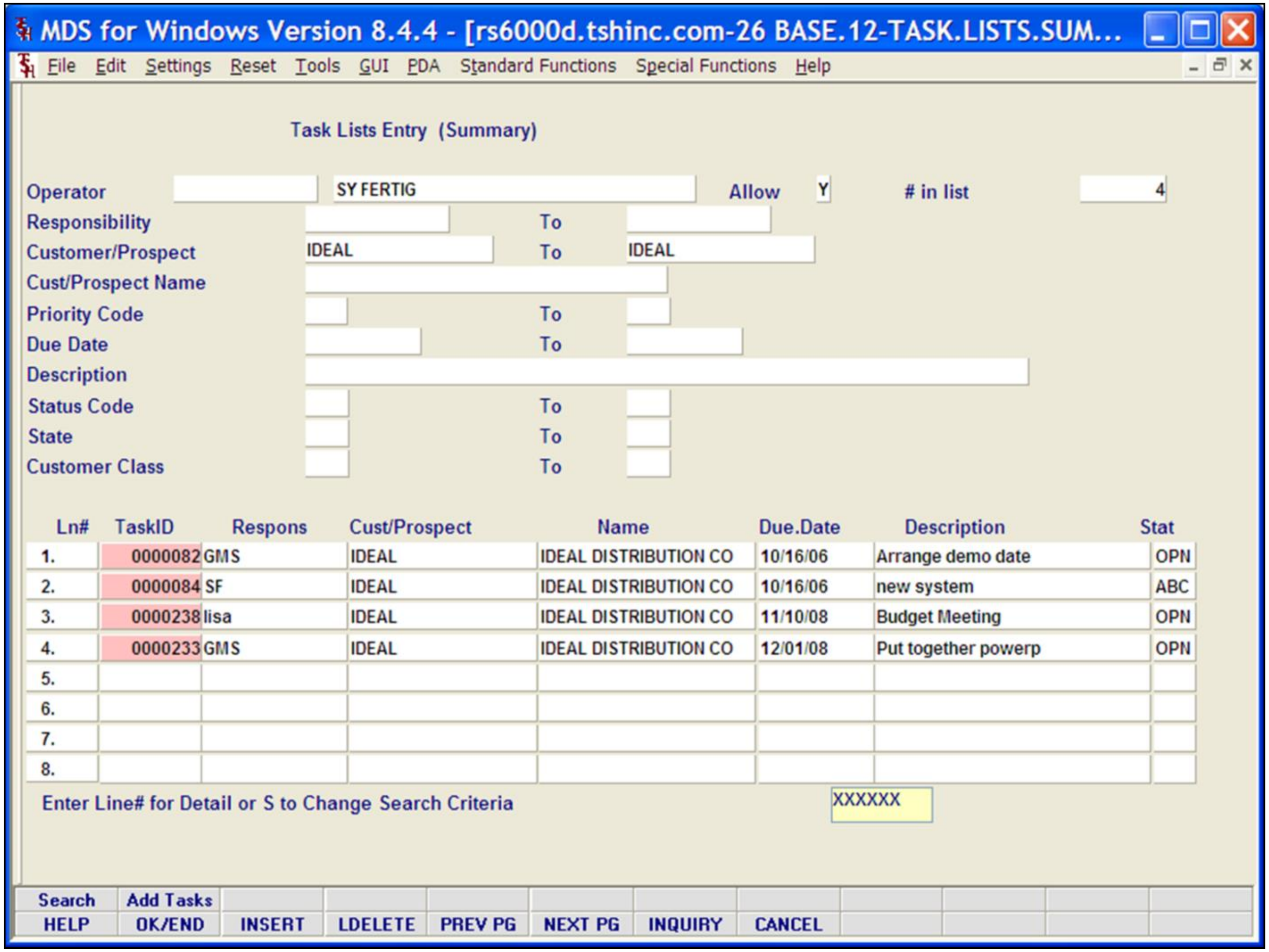
Customer/ Prospect (2 fields) – Enter starting and ending Customer or Prospect code.

Cust/ Prospect Name – Enter any part of the customer/prospect name.

Priority Code (2 fields) – Enter starting and ending priority code (1-99) for this search.

Due Date (2 fields) – Enter starting and ending due date for search. Click on the drop down box and select a date or enter date format ‘DDMMYY’.

Notes



Notes:

Task Lists (Summary)

Description – Enter any part of the description for this search.

Status Code (2 fields) – Enter starting and ending status code for this search. You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu for you to select from the available status codes.

State (2 fields) – Enter starting and ending State Code for this search. You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu for you to select from the available States.

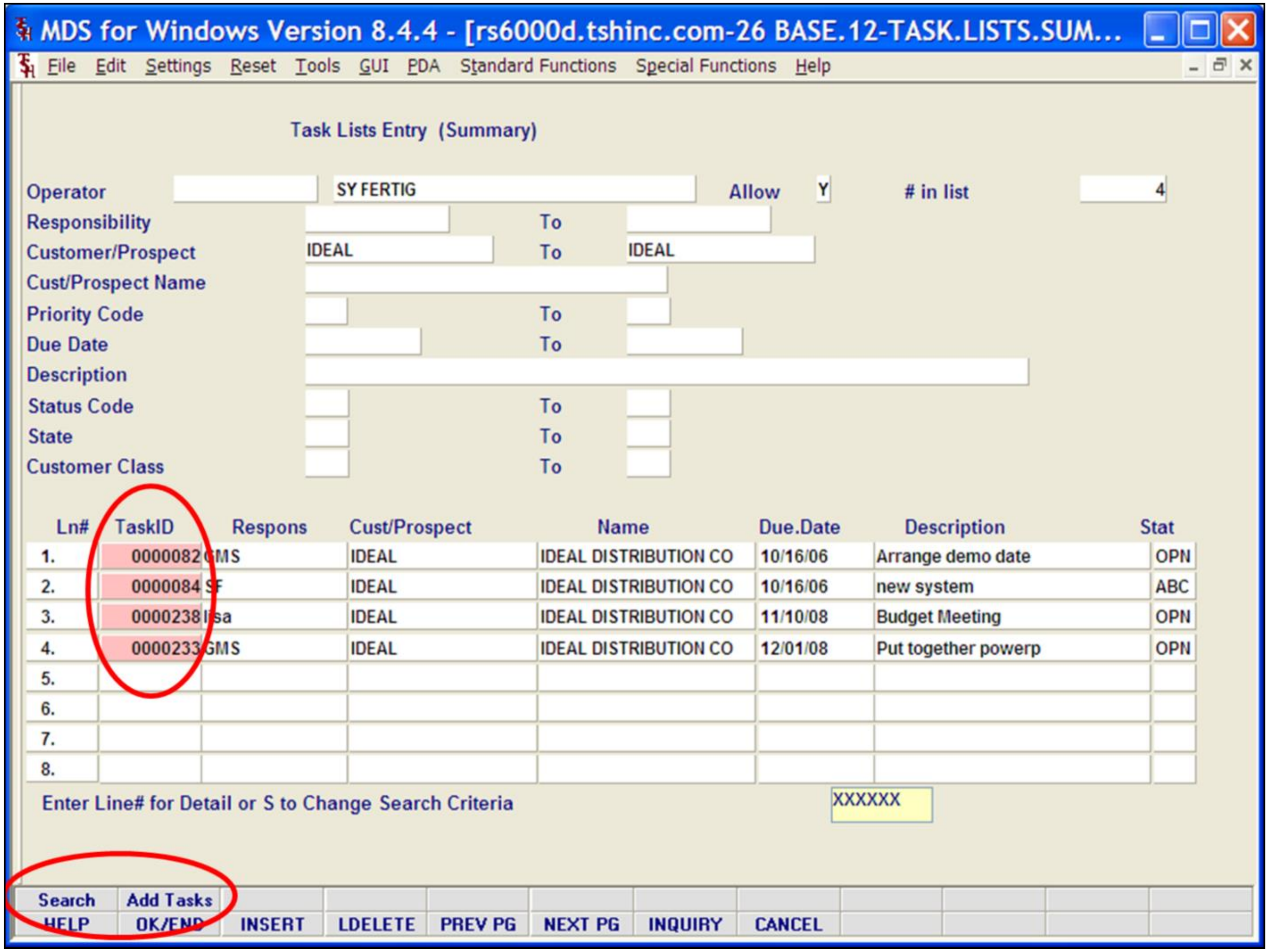
Customer Class (2 fields) – Enter starting and ending Customer Class code for this search. You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu for you to select from the available Customer Classes.

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

Enter a line number to see task detail, "S" to change search criteria and search again.

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.



Task Lists (Summary) Functions

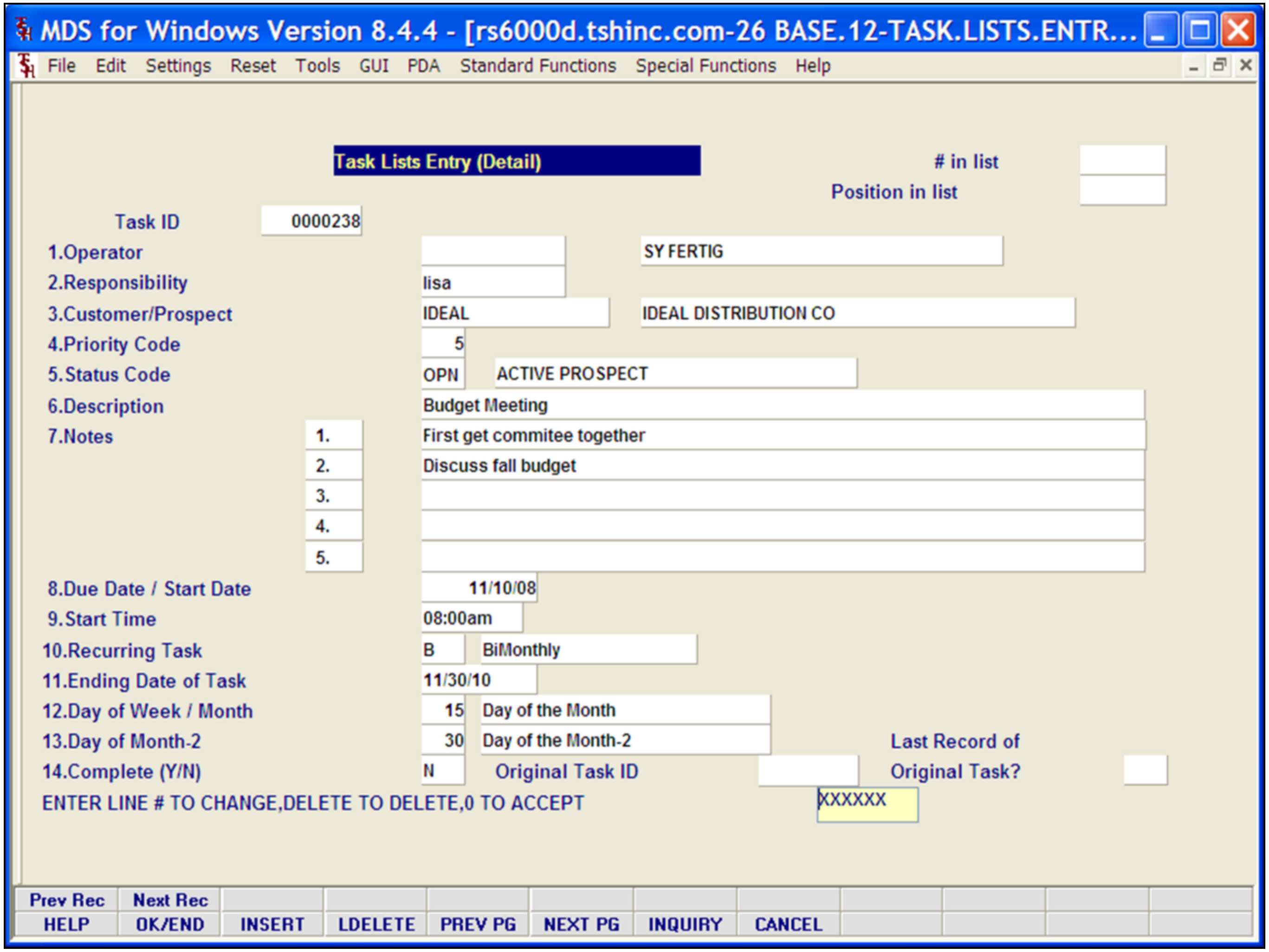
Drill Down – To access the drill down capabilities of this inquiry, click on the **'TaskID'.** This will take the operator to the detailed information for this task.

Function Keys:

Search – The Search function is available by clicking on the **'Search'** icon or by pressing the 'F1' function button. This function will clear the current data and allow you to perform another search.

Add Tasks – The Add Tasks function is available by clicking on the **'Add Tasks'** icon or by pressing the 'F2' function button. This function takes the user to the Task List Detail screen to enter a new task.

Notes:



Notes:

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Task Lists (Detail)

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Notes/Task menu, then Task Lists (Detail).

This screen allows you to enter and maintain tasks by operator.

Task ID- Enter a valid task ID or press the down arrow for the next available Task ID number.

Operator – The current operator entering this this task will be filled in here**.**

Responsibility – Enter a name of person responsible for this task.

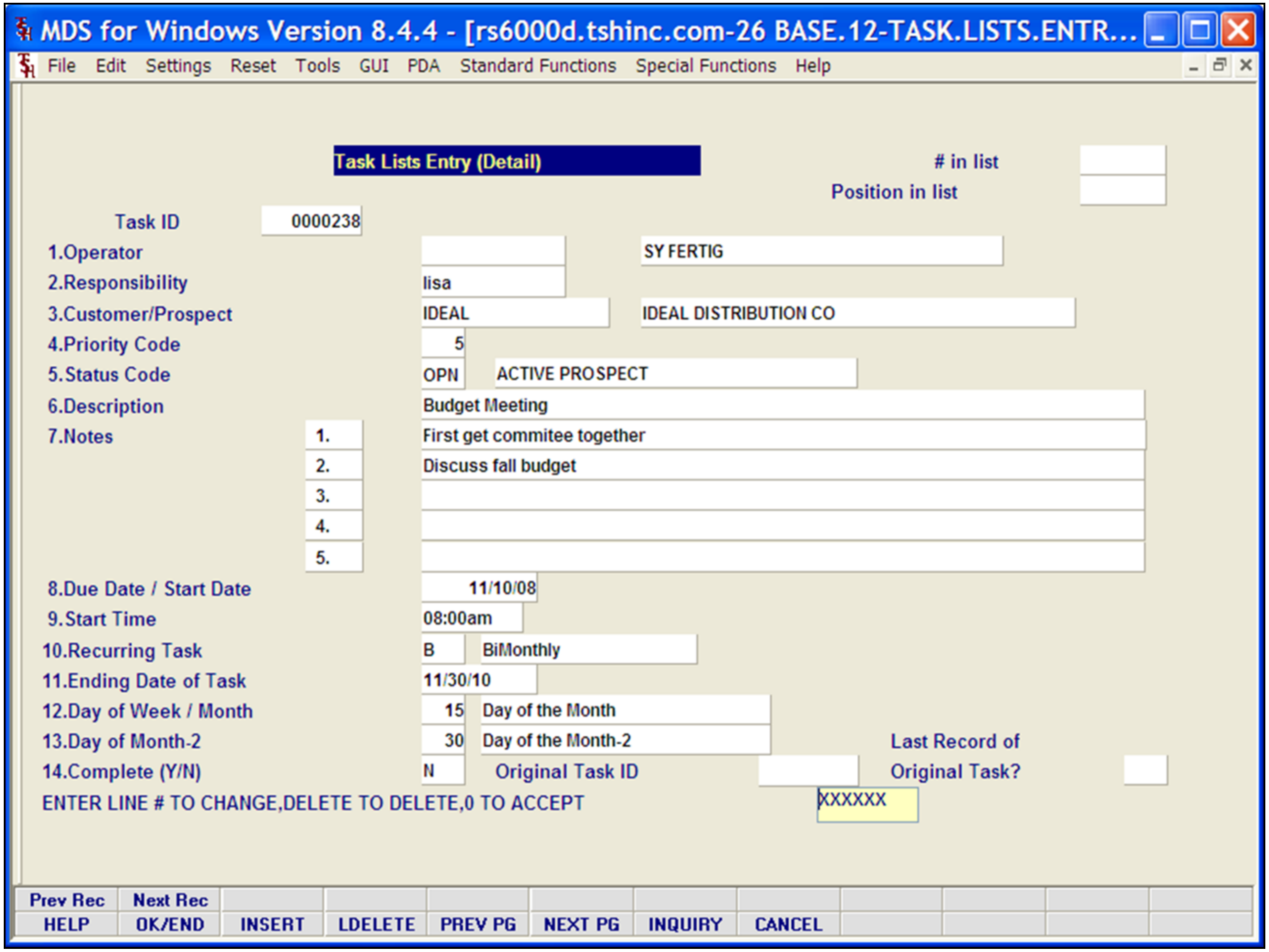
Customer/ Prospect – Enter Customer or prospect code for this task. You can enter the customer number or part of the customer number, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the correct customer.

Priority Code – Enter a number for priority code 1-99.

Status Code – Enter a valid status code or **c**lick on the drop down box to select from a list of status codes.

Description – Enter short description for this task (50 characters)

Notes - Enter notes associated with this task



Notes:

Task Lists (Detail)

Due Date / Start Date – Enter Due date if this is NOT a recurring task, Enter start date if this is a recurring task. Click on the drop down box and select a date or enter date.

Start Time – Enter Start time for this task in half hour increments.

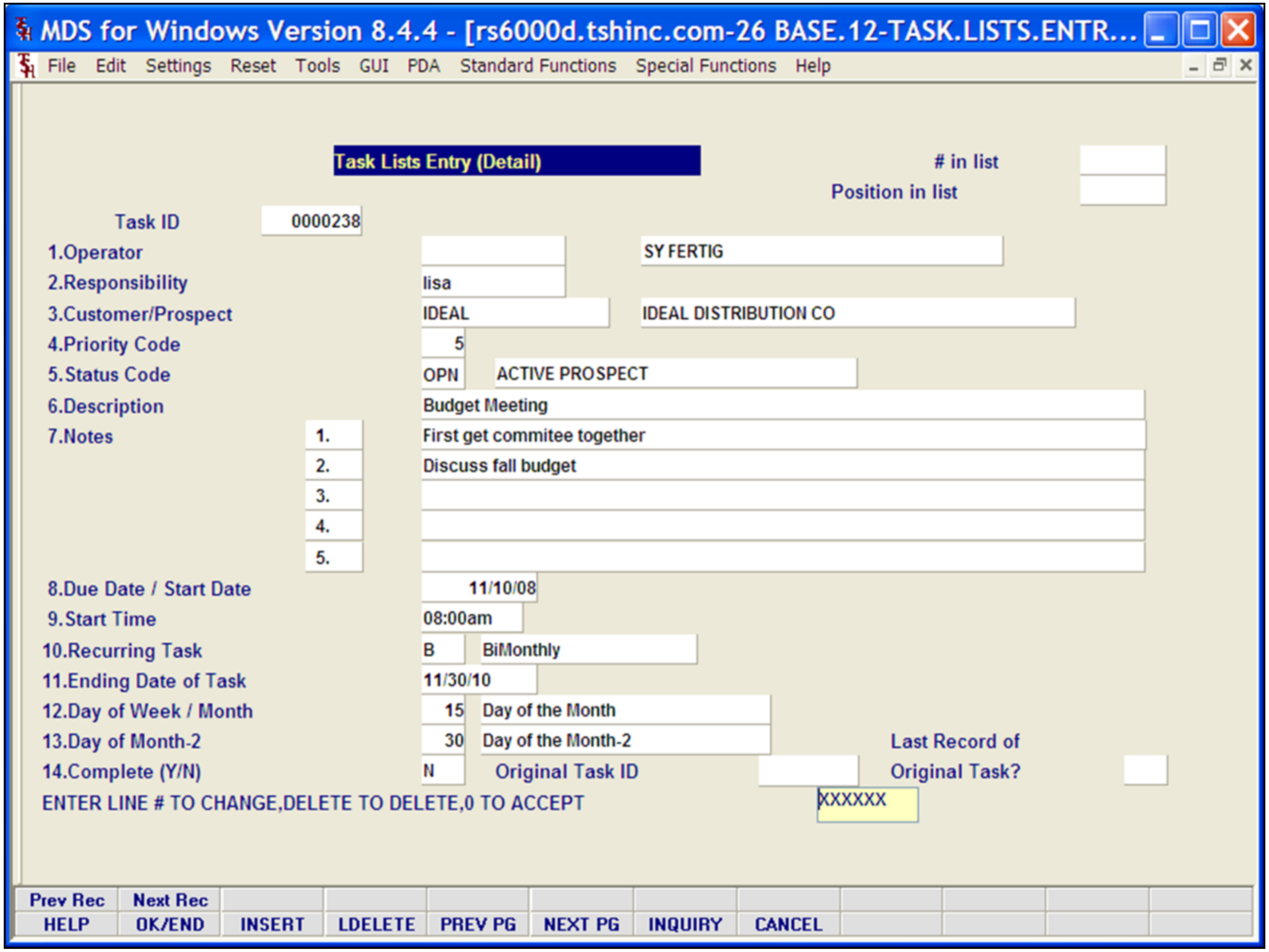
Recurring Task – Enter recurring task code or click on the 'INQUIRY' icon or press the 'F7' function to choose from a list of available recurring task codes . Options are: "D" – Daily, "W" – Weekly, "M"- Monthly, "B" – BiMonthly, "Y" – Yearly. If this is not a recurring task enter "N".

Ending Date of Task – For recurring tasks, enter ending date of task. Click on the drop down box and select a date or enter date.

Day of Week/ Month – If you are using this task to create a recurring task, then enter a valid day of the week or day of the month (whichever is applicable) for the type of recurring task entered. Enter a recurring task day code or click on the 'INQUIRY' icon or press the 'F7' function to choose from a list of available days of the week. For days of the week, options are: "1-5" – Monday- Friday.

If "M", "B" or "Y" was entered in the recurring task field, then you must enter a valid day of the month 1 to 31.

Day of Month–2 – If this task is a bi-monthly task enter the second Day of the month here.



Task Lists (Detail)

Complete (Y/N) – Is this task complete "Y" for Yes, "N" for No.

Original Task ID – The original task ID will display.

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

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can enter Line Number to make desired changes on the header screen.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Notes:

```
PAGE    1 **QUICK NOTES LISTING** DATE 01:32:41pm  04 Nov 2008

QUICK.NOTES NOTES.........................

CB          Call Back Later

N1          NOTE-1 Initial contact note

N2          NOTE-2 Second contact note

N3          NOTE-3 Third contact note

PR          PRIORITY

4 records listed.
```

Notes:

Quick Notes Listing

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Notes/Task menu, then Quick Notes Listing.

This report will give you a listing off all Quick Note Codes and the corresponding note.

There are no selection criteria.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

```
          TASK LISTS REPORT            01:32:55pm  04 Nov 2008     PAGE:       1

TASK.ID    ORIG OPR RESPONS... A.CUST.NO PRI DUE.DATE DESCRIPTION................. STAT.CODE STAT.DATE RECC END.DATE DAY.WK.MN/
        TASK ID                              START.DT                                                  TASK              DAY.MON2

0000080          SY1 GMS       GRACE          10/16/06 PRODUCT GUIDE               ABC        10/16/06 N
0000081          SY1 GMS       GRACE        1 12/17/07 TEST                        55         12/17/07 N
0000082          SY1 GMS       IDEAL          10/16/06 Arrange demo date           OPN        11/04/08 N
0000083          SY1 GMS       GRACE          10/16/06 TET                                    10/16/06 N
0000084          SY1 SF        IDEAL        1 10/16/06 new system                  ABC        11/04/08 N
0000085          SY1 GMS       GRACE          10/16/06                                        10/16/06 N
0000087 0000081  SY1 GMS       GRACE          10/16/06 TEST                                   10/16/06 N
0000088 0000081  SY1 GMS       GRACE          10/17/06 TEST                                   10/16/06 N
0000089 0000081  SY1 GMS       GRACE          10/18/06 TEST                                   10/16/06 N
0000090 0000081  SY1 GMS       GRACE          10/19/06 TEST                                   10/16/06 N
0000091 0000081  SY1 GMS       GRACE          10/20/06 TEST                                   10/16/06 N
0000092 0000082  SY1 GMS       GRACE          10/16/06 TESTING                                10/16/06 N
0000093 0000082  SY1 GMS       GRACE          10/23/06 TESTING                                10/16/06 N
0000094 0000082  SY1 GMS       GRACE          10/30/06 TESTING                                10/16/06 N
0000095 0000082  SY1 GMS       GRACE          11/06/06 TESTING                                10/16/06 N
0000096 0000082  SY1 GMS       GRACE          11/13/06 TESTING                                10/16/06 N
0000097 0000083  SY1 GMS       GRACE          10/16/06 TET                                    10/16/06 N
0000098 0000083  SY1 GMS       GRACE          11/16/06 TET                                    10/16/06 N
0000099 0000083  SY1 GMS       GRACE          12/16/06 TET                                    10/16/06 N
0000100 0000084  SY1 GMS       GRACE          10/16/06 TEST 1                                 10/16/06 N
0000101 0000084  SY1 GMS       GRACE          10/20/06 TEST 1                                 10/16/06 N
0000102 0000084  SY1 GMS       GRACE          11/16/06 TEST 1                                 10/16/06 N
0000103 0000084  SY1 GMS       GRACE          11/20/06 TEST 1                                 10/16/06 N
0000104 0000084  SY1 GMS       GRACE          12/16/06 TEST 1                                 10/16/06 N
0000105 0000085  SY1 GMS       GRACE          10/16/06                                        10/16/06 N
0000106 0000085  SY1 GMS       GRACE          10/16/07                                        10/16/06 N
0000107 0000085  SY1 GMS       GRACE          10/16/08                                        10/16/06 N
0000122 0000081  SY1 GMS       GRACE        1 12/20/07 TEST                        55         12/17/07 N
0000125          SY1 david                    08/22/08 Call Prospect david         OPN        08/01/08 N
0000233          SY1 GMS       IDEAL        1 12/01/08 Put together powerpoint for OPN        09/25/08 N
0000238          SY1 lisa      IDEAL        5 11/10/08 Budget Meeting              OPN        11/04/08 B    11/30/10      15/30

31 records listed.
```

Notes:

Quick Notes Maintenance

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Notes/Task menu, then Task List (Detail) Listing.

This report shows all tasks for the selected task operator, status code and status date combination. It lists Task ID number, Operator code, person Responsible, Customer Number, Priority, Due date/ Start Date (for recurring tasks), Description, Status Code, Status Date, Recurring task status, End Date, Day of the week and day 2 (for bimonthly recurring vouchers).

Task Operator - In this field the operator has the option of selecting 'All Task Operators', 'Task Operator Range' or 'Specific Task Operator'.

Status Code – In this field the operator has the option of selecting 'All Status Codes', 'Status Code Range' or 'Specific Status Code'.

Status Date - In this field the operator has the option of selecting 'All Status Dates', 'Status Date Range' or 'Specific Status Date'.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

Where to Get More Information

- Additional Training Sessions
- Place a support call on CRS system: http://crs.tshinc.com/
- Call The Systems House, Inc. at 973-777-8050

More Information

Please send any comments on this guide to our documentation department at: documents@tshinc.com

Notes: