



RemoteNet Web Based CRM



Web Based CRM



WEBSITE

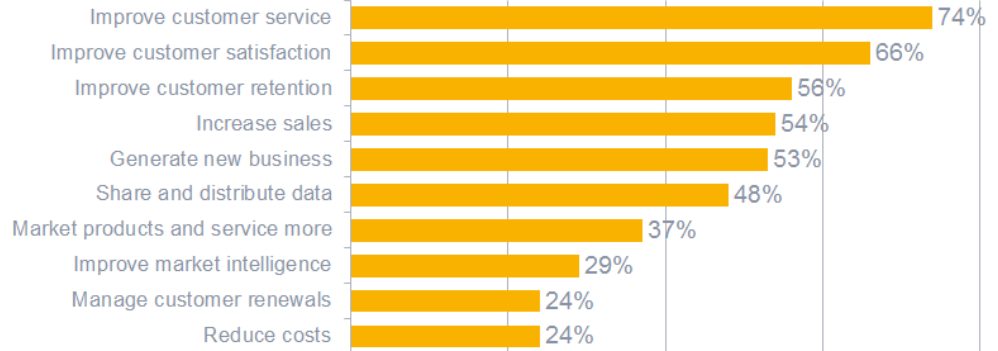


VS

WEB APPLICATION

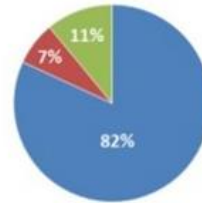


What are the main benefits your business hopes to achieve using CRM?



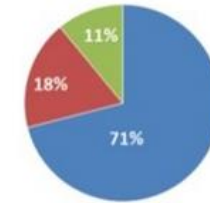
“Every CRM implementation must first deal with resistance that comes in two forms – skepticism and discomfort”

Comfort with Technology is a Significant Early Barrier



• Agree • Neutral • Disagree

Salespeople Demand Evidence Upfront Before Committing



• Agree • Neutral • Disagree

Data represent findings from online survey of distributor executives.



Web Vs Windows App

The RemoteNet WebCRM System is designed to allow a user friendly and flexible interface to the MDS-CRM backend. Both applications share a database and updates are done in real-time.



WebCRM Overview

Daily Calls & Contacts

- Login to see a personalized of prospects and customers easily filtered and search as well as a count of real time action items.

Detailed Customer or Prospect Information

- View and update customer and prospect info, contacts and contact info.

Update Notes

Sales Projections and Sales Funnel

- Create interactions with add d notes, action codes and sales projections

Schedule Follow-up/Emails/Calls

- Easily schedule follow-ups with G-Suite and Outlook Integration (vcal)

Verify Ownership of Prospects and Create New Prospects

- Using universal search verify another salesperson is not already engaged or easily create as a new lead/prospect.

Convert Prospects to Customers

- (Based on permissions) convert a prospect to a customer on the fly.

Create Quotes and Save Pricing

- Create Quotes and save pricing for the new customer/prospect visible for all managers and customer service .



CRM Call List

- ◇ Search and Filter
- ◇ Create and Send Credit Applications
- ◇ Open Multiple Tabs
- ◇ Or Use Single View



CRM Call List 7.0 | 12347 CRM Detail | 12345 CRM Detail | 100659 CRM Detail

Not secure | hosting.tshinc.com/MDSWEB/login012#

B2B ECOMMERCE

Place an Order | My Account | Deals | Contact Us | Home | Welcome SLS | Current Order: 005348 - \$0.00 | Call Us: 800-637-5556 | Enter Product Code

Remotenet CRM - Daily Call and Contact List

Initial Calls:	Daily:	1	Monthly:	6	Yearly:	6
Total Calls:	Daily:	3	Monthly:	8	Yearly:	8
99 Follow up with call	Daily:	1	Monthly:	1	Yearly:	1
CA SEND CATALOG	Daily:	1	Monthly:	1	Yearly:	1
LT SEND LETTER	Daily:	1	Monthly:	1	Yearly:	1

Refresh | Universal Search

Salesman Activity and Notes | GO | Filter Last Note Date | to | Filter Follow Up Date | to | Search: | Show 10 entries

Customer Prospect Number	Salesman	Account Status	Customer Prospect Information	City	State	Last Note Date	Status	Follow up Date	Business Class	Lead Source	Next Step	Custom Fields
100659	001 Fred Arimsons	Customer	david smith		AL	07/20/2019	CUSTOMER		Doctor Office			
100663	001 Fred Arimsons	Customer	usmed DAVID FERTIG 941-284-8122 david@tshinc.com	sarasota	FL	11/16/2019						
100676	001 Fred Arimsons	Prospect	973-777-3063 Seymour Fertig 973-777-8050 sf@tshinc.com	1033 Route 46 East	NJ							
12310	001 Fred Arimsons	Customer	Hampton Medical Care 631-728-4700	Hampton Bays	NY	06/29/2018						
12345	001 Fred Arimsons	Customer	Dr Michael Smith	Riverhead	NY	09/14/2018		09/22/2018				USA1

Detailed Prospect/Customer

CRM Call List 7.0 | 12347 CRM Detail | 12345 CRM Detail | 100659 CRM Detail

Not secure | hosting.tshinc.com/MDSWEB/login012

Apps | RemoteNet Public S... | Crystal Reports Vie... | Paychex Flex | GitHub - Jpulver94/... | VIPRE Definitions | ValleyNationalBank... | push sunset-git | Scrollable menu wit... | Collaboration | TSH Customer Rep...

Details for Account: 12347 Assigned to Salesman: GRACE HECK Email: gms@tshinc.com

Credit Application

Initial Calls:	Daily:	0	Monthly:	0	Yearly:	0
Total Calls:	Daily:	0	Monthly:	0	Yearly:	0

Prospect/Customer Info | Visualize Sales | Last 25 Orders | Last 25 Items | Daily Deals | Pending Web Quotes/Orders

Last Updated at: 07:30:28pm on 12/17/19

Customer Details

Customer Number:	12347	Salesman:	--- GRACE HECK / ---	Terms Code:	02 COD	YTD Sales:	0.00
Customer Name:	Bright Dentists	Class:	01 Doctor Office	Credit Limit:	5,000	MTD Sales:	---
Create Date:	01/09/14	Type:	01 Default Cust Type	Open AR:	40,384.84	YTD GP Dollars:	---
City State Zip:	Briarcliff Manor NY 10510	Pricing Contract:	---	Last Order:	20192.42 on 03/13/14	MTD GP Dollars:	---
GPO:	---	Ship Method:	01 Best Way	Last Payment:	---	DEA License:	Expires:

Prospect Details

Name:	Bright Dentists	Primary Contact:	---	Second Contact:	---	Third Contact:	---
Address1:	1117 Pleasantville Rd	Title:	---	Title:	---	Title:	---
Address2:	---	Phone:	914-923-4900	Phone:	---	Phone:	---
Address3:	---	Fax:	---	Extension:	---	Extension:	---
City:	Briarcliff Manor	Email:	---	Mobile:	---	Mobile:	---
State:	NY			Fax:	---	Fax:	---
Zip:	10510			Email:	---	Email:	---
Web Url:	---						

All Additional Contacts:	Title:	Phone:	Fax:	Cell:	Email:
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Custom Data Fields

Shows Attended	---	Annual Sales Potential	---	Memberships	---
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Sales Projection Information

Update Notes / Follow-up

The screenshot shows a web browser window with multiple tabs open, including 'CRM Call List 7.0', '12347 CRM Detail', '12345 CRM Detail', and '100659 CRM Detail'. The address bar shows the URL 'hosting.tshinc.com/MDSWEB/login012'. The browser's taskbar at the bottom lists various applications like 'RemoteNet Public S...', 'Crystal Reports Vie...', 'Paychex Flex', 'GitHub - Jpulver94/...', 'VIPRE Definitions J...', 'ValleyNationalBank...', 'push sunset-git', 'Scrollable menu wit...', 'Collaboration', and 'TSH Customer Rep...'. The main content area is divided into several sections:

- All Additional Contacts:** A table with columns for Title, Phone, Fax, Cell, and Email.
- Custom Data Fields:** Includes 'Shows Attended', 'Annual Sales Potential', and 'Memberships'.
- Sales Projection Information:** Features dropdown menus for 'Close/Deal' and 'Close/Deal Month', a 'Proposed Month' dropdown, and 'Update Date' and 'Update Time' fields. An 'Add Projection' button is present.
- Follow-up and Notes:** A section titled 'Showing 5 Notes. Limited to 5'. It contains several dropdown menus for 'Prospect Status', 'Next Step', 'Lead Source', and 'Business Class'. It also has a 'Note Contact' dropdown, a 'Date' field (set to 12/07/2019), and a 'Time' dropdown (set to 8:00pm). Other fields include 'Days Until Call' (-18979) and 'Schedule Appointment' (gms@tshinc.com). A 'Delete Follup Date/Time' button is also visible.

A time selection dropdown menu is open in the 'Time' field, showing options from 7:30pm to 10:00pm, with 8:00pm selected. A blue callout box with the text 'Email/Add Appointment to Calendar' points to the 'Schedule Appointment' field.

Ln#	Date Time	Created by	Contact Person	Notes	Action	Completion Date
1	06/01/2018 01:35pm	SLS		Call Back		
2	06/01/2018 01:35pm	SLS		Need to send update quote back		
3	05/15/2018 04:09pm	SLS		Followup in 30 days call back erinn		
4	04/30/2018 05:25pm	SLS		Followup in 30 days david called and needs a quote		
5	04/27/2018 10:47am	12347SELL		Followup in 30 days		

Follow-up appointment

CRM Call List 7.0 | 12347 CRM Detail | 12345 CRM Detail | 100659 CRM Detail

Not secure | hosting.tshinc.com/MDSWEB/login012

Apps RemoteNet Public S... Crystal Reports Vie... Paychex Flex GitHub - Jpulver94/... VIPRE Definitions L... ValleyNationalBank... push sunset-git Scrollable menu wit... Collaboration TSH Customer Rep...

Your Appointment has been Emailed to: david@tshinc.com
Click here to download your appointment or check your email

Last Updated at: 07:41:23pm on 12/17/19

Customer Details

Customer Number: 12347	Salesman: --- GRACE HECK / ---	Terms Code: 02 COD	YTD Sales:
Customer Name: Bright Dentists	Class: 01 Doctor Office	Credit Limit: 5,000	MTD Sales:
Create Date: 01/09/14	Type: 01 Default Cust Type	Open AR: 40,384.84	YTD GP Dollars:
City State Zip: Briarcliff Manor NY 10510	Pricing Contract: ---	Last Order: 20192.42 on 03/13/14	MTD GP Dollars:
GPO: ---	Ship Method: 01 Best Way	Last Payment: ---	DEA License:

Prospect Details

Name: Bright Dentists	Primary Contact: Grace Heck	Second Contact: ---	Third Contact: ---
Address1: 1117 Pleasantville Rd	Title: AD Admin Assistant	Title: ---	Title: ---
Address2: ---	Phone: 914-923-4900	Phone: ---	Phone: ---
Address3: ---	Fax: 914-777-7471	Extension: ---	Extension: ---
City: Briarcliff Manor	Email: gheck@Dental1.com	Mobile: ---	Mobile: ---
State: NJ	Fax: ---	Fax: ---	Fax: ---
Zip: 10510	Email: ---	Email: ---	Email: ---
Web Url: ---			

All Additional Contacts:	Title:	Phone:	Fax:	Cell:	Email:

Custom Data Fields

Shows Attended: ---	Annual Sales Potential: ---	Memberships: ---
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Sales Projection Information

Close/Deal	Close/Deal Month	Proposed Month	Update Date	Update Time
<input type="text"/>	<input type="text"/>	Select a Proposed Month	<input type="button" value="Add Projection"/>	
70	70	Sep	12/17/19	07:40:06pm
20	10	Feb	12/17/19	07:39:08pm
10	10	Jan	12/17/19	07:38:51pm

Follow up with 12347 Bright Dentists - Ap...

File Appointment Scheduling Assistant Insert Draw Format Text Review Help Tell me

Actions Skype Meeting Online Meeting Teams Meeting Invite Attendees Options Tags Dictate Office Add-ins

Title: Follow up with 12347 Bright Dentists

Start time: Sat 12/21/2019 2:00 PM Eastern Time (US & Canada)

End time: Sat 12/21/2019 2:30 PM Eastern Time (US & Canada)

Location: [input field]

Contact: Grace Heck
Phone: 914-923-4900
Fax: 914-777-7471
Email: gheck@Dental1.com
Call Back Followup in 60 days

Update Action Code / Funnel

The screenshot shows a web browser window with multiple tabs for CRM details. The active page is a form for updating an action code. The form includes fields for Prospect ID, Proposed Month, and Update Time. A table below the form shows a list of actions with columns for Ln#, Date Time, Created by, Contact Person, Action, and Completion Date. A red error message states "Action Code is required." A dropdown menu is open for "Select an Action Code", showing options like "Follow up with call", "SEND CATALOG", "SEND LETTER", and "MEETING".

Form Fields:

- Prospect ID: [Dropdown]
- Proposed Month: [Select a Proposed Month]
- Update Time: [Add Projection]

Table:

Ln#	Date Time	Created by	Contact Person	Action	Completion Date
1	12/17/2019 07:41pm	Default Operator	Grace Heck	Follow up with call	12/27/2019
2	06/01/2018 01:35pm	SLS		SEND CATALOG	
3	06/01/2018 01:35pm	SLS		SEND LETTER	
4	05/15/2018 04:09pm	SLS			
5	04/30/2018 05:25pm	SLS		MEETING	

Form Elements:

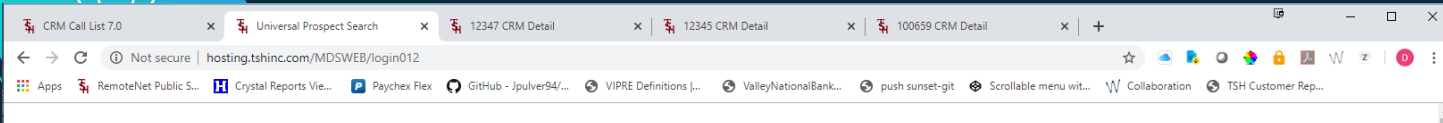
- Prospect Status: [Dropdown]
- Next Step: [Dropdown]
- Lead Source: [Dropdown]
- Business Class: [Dropdown]
- Note Contact: Grace Heck
- Date: 12/07/2019
- Time: 8:00pm
- Sent Literature: [Dropdown]
- Add Note
- Delete Follup Date/Time
- Follow Up Date: 12/21/19
- Follow Up Time: 14:00
- Days Until Call: 4
- Schedule Appointment: david@tshinc.com
- Email/Add Appointment to Calendar

Error Message: Action Code is required.

Action Code Selection:

- Select an Action Code
- Follow up with call
- SEND CATALOG
- SEND LETTER
- MEETING

Verify Prospect or Create



[Place an Order](#) [My Account](#) [Deals](#) [Contact Us](#) [Home](#)

Welcome SLS | Current Order: 005348 - \$0.00 | Call Us: 800-637-5556

Universal Prospect Search

Search for a prospect across all salesman using a name filter

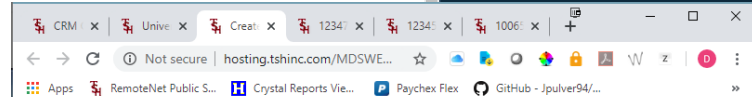
If your search returns a prospect that is inactive in the sales process, please contact the appropriate sales manager to have this prospect assigned to you.

Last Updated at: 07:46:36pm on 12/17/19

Enter search filter:

Customer Name:

Customer Code	Name	Address 1	City	State	Last Note Date	Salesman
12350	Ameln Medical Associ	11 Old Town Drive	Baldwin	NY	07/16/2018	Fred Armons
23678	Bridgheampton Medical	234 Main Street	Bridgheampton	NY	01/15/2014	Scott Smith
12347	Bright Dentists	1117 Pleasantville Rd	Briarcliff Manor	NY	12/17/2019	GRACE HECK
12349	Dr J Dietz MD	11 Medical Dr. Suite B	Ronkonkma	NY	05/24/2019	Fred Armons
12345	Dr Michael Smith	Office Park Rd St 11	Riverhead	NY	09/14/2018	Fred Armons
2346	Dr. Jeffery Silverman	98 Montuk Hwy	West Hampton	NY	01/14/2014	Scott Smith
2378	East Hamton Medical	456 Main Street	East Hampton	NY	01/15/2014	Scott Smith
12348	Family Medicine Group	213 Main St Ste 2	Baybill	NY	06/01/2018	Fred Armons
12310	Hampton Medical Care	145 W Montauk Highway	Hampton Bays	NY	06/29/2018	GRACE HECK
14814	MILPOND VET	12 MAIN STREET	Milford	PA	11/21/2018	Fred Armons
123510	Medical Practice Intl.	111 Main St Ste 2	OFFICA	NY	07/20/2018	Fred Armons
23456	South Hampton Medical	101 Main Street	South Hampton	NY	01/14/2014	Scott Smith
GRACEPROSPECT	Testing Credit Card	1033 ROUTE 46 STE A202	1033 Route 46 East	NH	07/22/2019	Fred Armons
23098	Water Mill Medical	235 Main Street	WALTON	NY	11/20/2019	Scott Smith
stan	stan medical	1234 main street	clifton	NJ	Fred Armons	Fred Armons
100663	stan medical	2780 trinitate dr	oklawaha	FL	11/14/2019	Fred Armons



New Prospect Creation

Account Code or Customer Number:
Choose a unique Code for this prospect.
(Leave Blank if you do not have one)

Username or Email Address:

First Name:

Last Name:

Title:

Admin A...

Company Name:

Address Line 1:

Address Line 2:

Address Line 3 (Patient ID):

City:

State:

ALABAMA

Zip Code:

Phone:

Fax:

Once your new prospect is created you should see them on your dashboard and you can enter followup notes or schedule appointments.



Status Message:

Please Enter your Information Above and Click Register New User to create your new user account.

[Register New User](#)

Create Customer from Prospect

CRM Call List 7.0 | Universal Prospect Search | 23098 CRM Detail | Create New Prospect 6.2 | 12347 CRM Detail | 12345 CRM Detail | 100659 CRM Detail

Not secure | hosting.tshinc.com/MDSWEB/login012#

Apps | Remotenet Public S... | Crystal Reports Vie... | Paychex Flex | GitHub - Jpulver94/... | VIPRE Definitions |... | ValleyNationalBank... | push sunset-git | Scrollable menu wit... | Collaboration | TSH Customer Rep...

RE MOTENET
a2b ECOMMERCE

RNWeb Medical Supply

0 Item(s)
\$0.00

Place an Order My Account Deals Contact Us Home

Welcome SLS | Current Order: 005348 - \$0.00 | Call Us: 800-637-5556

Enter Product Code

Details for Account: 23098 Assigned to Salesman: Scott Smith Email: sales@TSHINC.COM

Credit Application

	Daily	Monthly	Yearly
Initial Calls:	0	5	5
Total Calls:	1	6	6
CA SEND CATALOG	1	1	1

Sorry, We have no customer sales information to display. Please verify you have a customer for this prospect. Alternately you can setup a Remotenet Web Customer Record using the Customer Account Code as the username.
[Click Here to Convert to New Customer](#)

Prospect/Customer Info | Visualize Sales | Last 25 Orders | Last 25 Items | Daily Deals | Pending Web Quotes/Orders

Created Customer: 23098 from prospect

Last Updated at: 08:00:50pm on 12/17/19

Customer Details

Customer Number:	---	Salesman:	--- / ---	Terms Code:	---	YTD Sales:	---
Customer Name:	---	Class:	---	Credit Limit:	---	MTD Sales:	---
Create Date:	---	Type:	---	Open AR:	---	YTD GP Dollars:	---
City State Zip:	---	Pricing Contract:	---	Last Order:	--- on ---	MTD GP Dollars:	---
GPO:	---	Ship Method:	---	Last Payment:	---	DEA License:	Expires

Prospect Details

Name:	Water Mill Medical	Primary Contact:	Mary Billings	Second Contact:	Alex Jones	Third Contact:	---
Address1:	235 Main Street	Title:	---	Title:	President	Title:	---
Address2:	---	Phone:	631-598-4509	Phone:	973-777-8050	Phone:	---

hosting.tshinc.com/MDSWEB/login012#

Create Quote for Customer

The screenshot shows a web browser window with multiple tabs open, including CRM Call List 7.0, Universal Prospect Search, 14814 CRM Detail, Create New Prospect 6.2, 12347 CRM Detail, 12345 CRM Detail, and 100659 CRM Detail. The browser address bar shows the URL `hosting.tshinc.com/MDSWEB/login012`. The page header features the REMOTENET logo and navigation links: Place an Order, My Account, Deals, Contact Us, Home. A welcome message reads: "Welcome SLS | Current Order: 005352 - \$23077.18 | Call Us: 800-6...".

The main content area displays "Details for Account: 14814 Assigned to Salesman: Fred Armisons Email: sales@tshinc.com". Below this is a "Credit Application" section with a table of call frequencies:

Credit Application	Daily	Monthly	Yearly
Initial Calls:	1	1	1
Total Calls:	2	2	2
99 Follow up with call	1	1	1
LT SEND LETTER	1	1	1

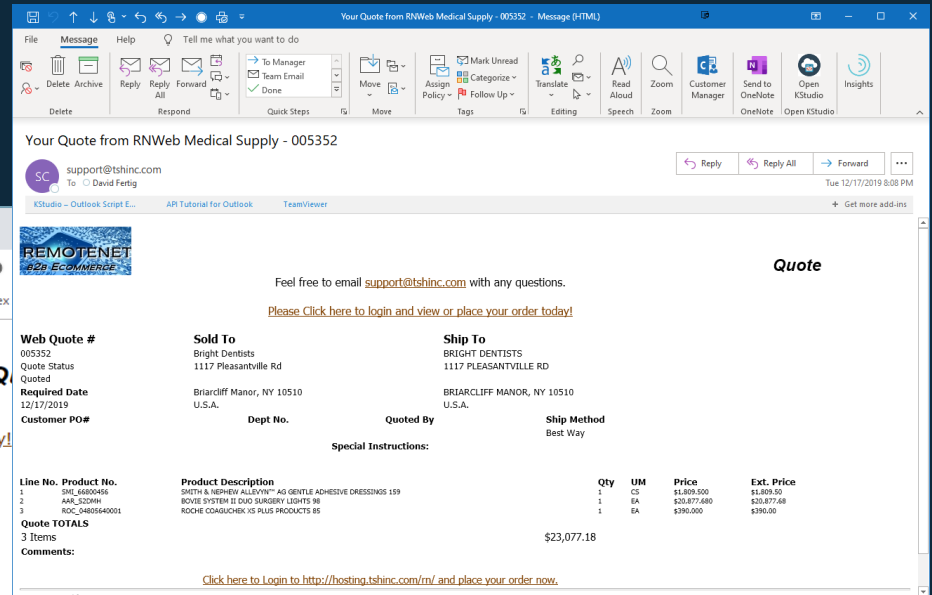
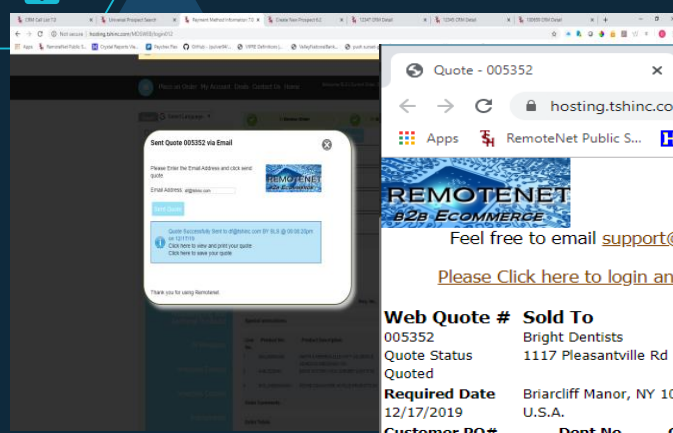
Below the table, a message states: "Email this web order 005352 - 23077.18 as a quote to a customer or prospect. To place a new order use your salesman dashboard and choose your customer login." To the right, a "Last 25 Items" popup window displays a table of products:

Product	Qty	UM	Price	Ext. Price
SML66800456	1	CS	\$1,809.500	\$1,809.50
AAR_S2DMH	1	EA	\$20,877.680	\$20,877.68
ROC_04805640001 1	1	EA	\$390.000	\$390.00

The popup also shows a total of \$23,077.18 and a green message: "Great News! you qualify for free freight. Your order needs to be at least \$250.00". Buttons for "Review Items" and "1-Click Checkout" are visible.

At the bottom of the page, there are navigation links: Information, Why Buy From Us, My Account.

Email Quote for Quick Ordering



Quote - 005352

hosting.tshinc.com/rnwrepro...

REMOJETNET
B2B ECOMMERCE

Feel free to email support@tshinc.com with any questions.
Please [Click here to login and view or place your order today!](#)

Web Quote #	Sold To	Ship To
005352	Bright Dentists	BRIGHT DENTISTS
Quote Status	1117 Pleasantville Rd	1117 PLEASANTVILLE RD
Quoted		
Required Date	Briarcliff Manor, NY 10510	BRIARCLIFF MANOR, NY 10510
12/17/2019	U.S.A.	U.S.A.
Customer PO#	Dept No.	Quoted By
		Ship Method
		Best Way

Special Instructions:

Line No.	Product No.	Product Description	Qty	UM	Price	Ext. Price
1	SMI_66800456	SMITH & NEPHEW ALLEVYN™ AG GENTLE ADHESIVE DRESSINGS 159	1	CS	\$1,809.500	\$1,809.50
2	AAR_S2DMH	BOVIE SYSTEM II DUO SURGERY LIGHTS 98	1	EA	\$20,877.680	\$20,877.68
3	ROC_04805640001	ROCHE COAGUCHEK XS PLUS PRODUCTS 85	1	EA	\$390.000	\$390.00

Quote TOTALS
3 Items \$23,077.18

Comments:

[Click here to Login to http://hosting.tshinc.com/r/ and place your order now.](http://hosting.tshinc.com/r/)





What's Next?

◇ Setup your Remotenet WebCRM Site Today

Contact 1-973-777-8050

Sales@tshinc.com

