Sales Management Guide

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Overview – Sales management involves automating and integrating every aspect of the prospect relationship so that the prospect's information passes smoothly from individual to individual, and the sales rep now dealing with the prospect has at his or her fingertips all the information required to properly service the prospective client.

MDS for Windows Version 7.12.8 - [rs6000d.tshinc.com-BASE.12-MENU]

File Edit Settings View Reset Tools GUI PDA Standard Functions Special Functions Help

Account:BASE.12   Port:012 Menu:MENU   Capture:On

Master Distribution System   Release 12.90608

Main System Selector

1. Order Entry and Invoicing	15. End of Day Processing
2. Order Entry Reports	16. End of Month Processing
3. Accounting Registers	17. End of Year Processing
4. Accounts Receivable	18. Inquiries
5. Price Maintenance/Price Books	19. Utilities
6. Costing/Inventory Evaluation	20. Recall Generator
7. Purchasing	21. Special Programs
8. Inventory/Warehouse Procedures	22. Electronic Mail
9. Physical Inventory Procedures	23. Purge and Fix Programs
10. Inventory Management	24. EDI Menu
11. Sales Analysis	25. Service Menu
12. File Maintenance	26. Raw Materials
13. Accounts Payable	27. Sales Management Menu
14. General Ledger	

Enter Selection or END :

HELP	CONTACTS	MAINT	DRILL	EXECINQ	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU		
	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup

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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:
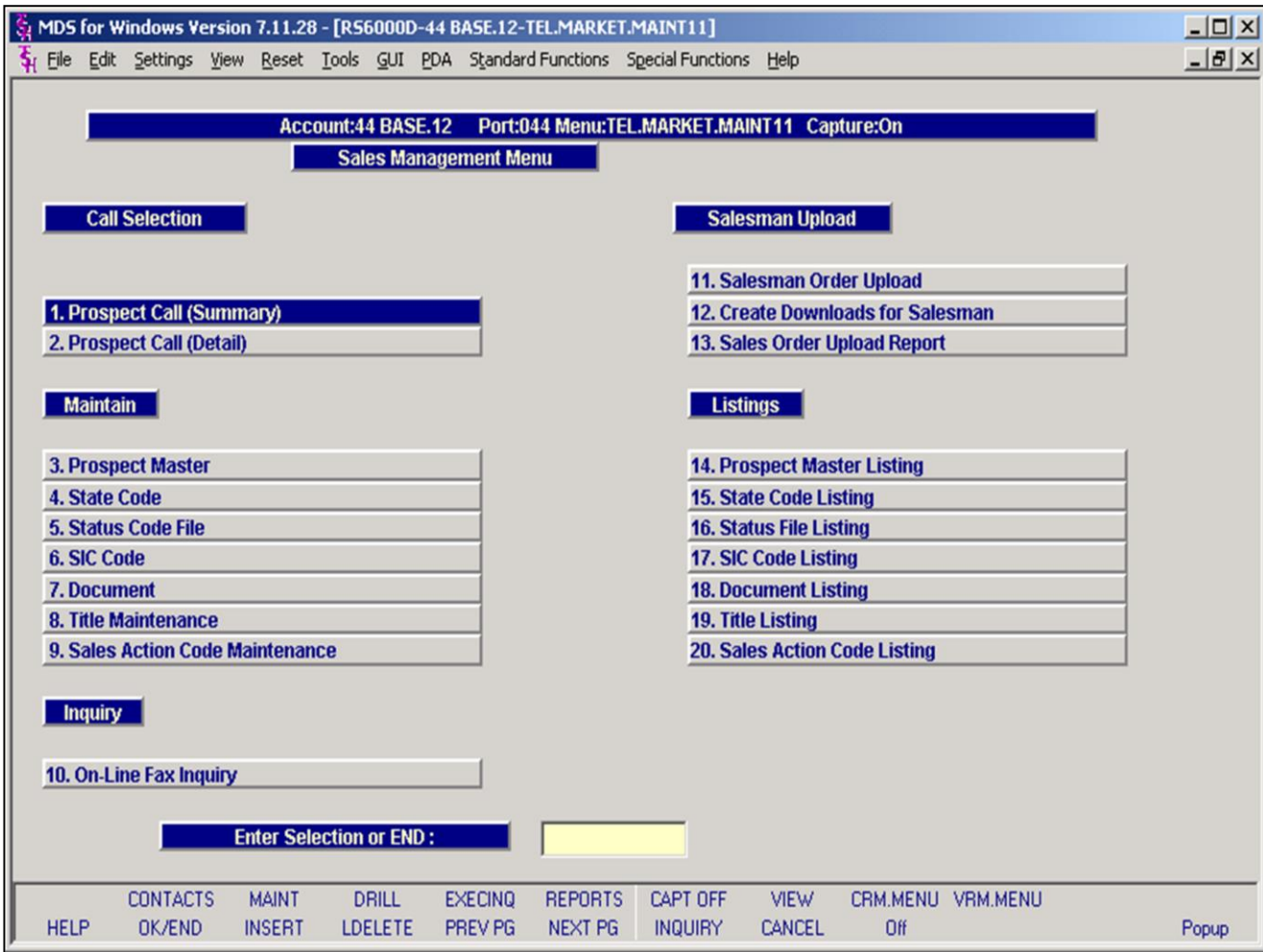
HELP - The HELP function is available by clicking on the 'HELP' icon or by pressing the <F1> function key. Help text is setup as two layers. By pressing 'F1' at the first field on the screen, an overall description of the master file will be displayed. If 'F1' is pressed at a specific field within the 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.
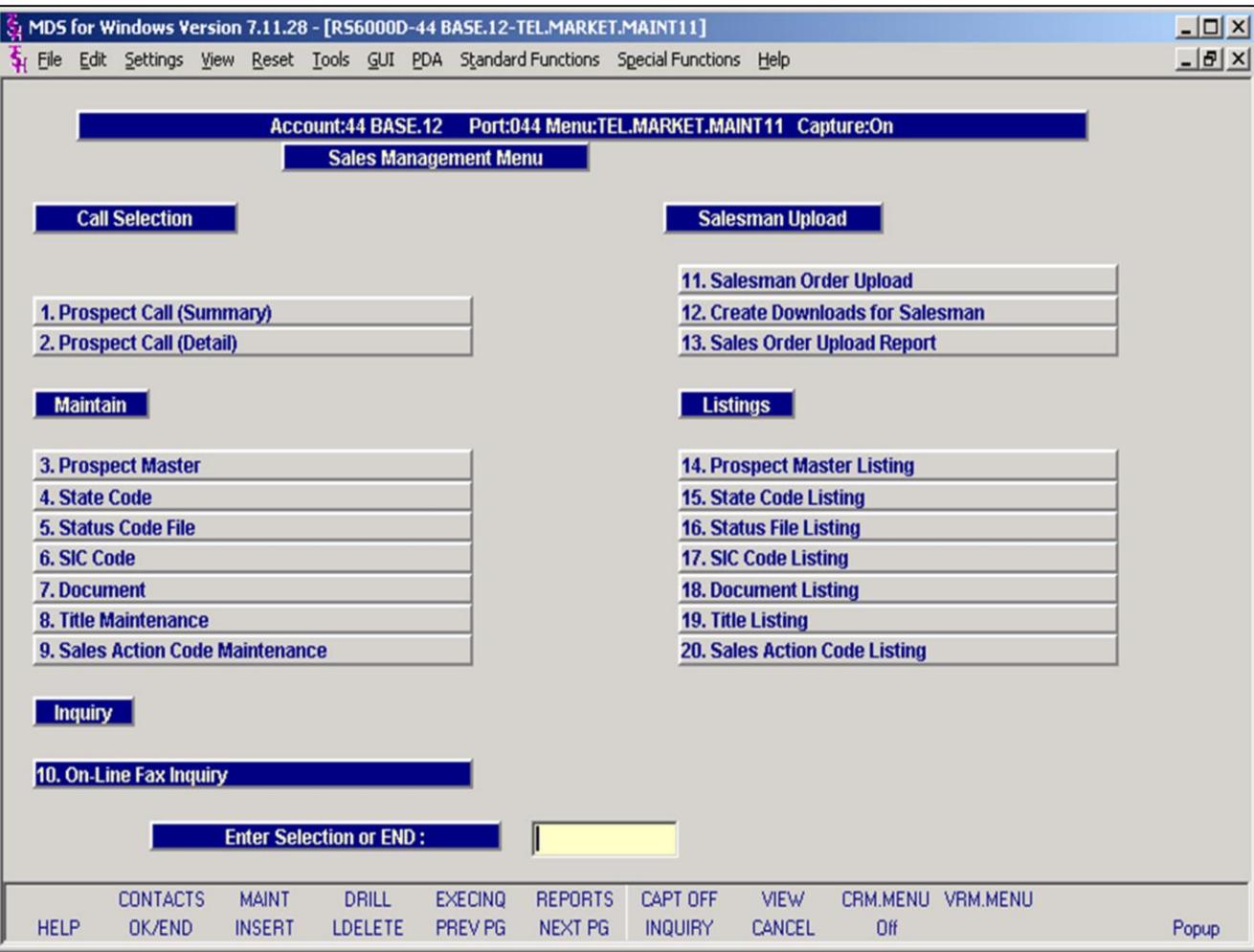
INSERT – The INSERT function is available by clicking on the 'INSERT' icon or by pressing the 'F3' function key. The INSERT mode feature allows insertion of letters or numbers into existing text.

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.

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MDS for Windows Version 7.11.28 - [RS6000D-44 BASE.12-TEL.MARKET.MAINT11]          _ |□| X|
File  Edit  Settings  View  Reset  Tools  GUI  PDA  Standard Functions  Special Functions  Help    _ |8| X|

              Account:44 BASE.12    Port:044 Menu:TEL.MARKET.MAINT11  Capture:On
                        Sales Management Menu

   Call Selection                                 Salesman Upload

                                                11. Salesman Order Upload
   1. Prospect Call (Summary)                   12. Create Downloads for Salesman
   2. Prospect Call (Detail)                     13. Sales Order Upload Report

   Maintain                                        Listings

   3. Prospect Master                            14. Prospect Master Listing
   4. State Code                                 15. State Code Listing
   5. Status Code File                           16. Status File Listing
   6. SIC Code                                   17. SIC Code Listing
   7. Document                                   18. Document Listing
   8. Title Maintenance                          19. Title Listing
   9. Sales Action Code Maintenance              20. Sales Action Code Listing

   Inquiry

   10. On-Line Fax Inquiry

              Enter Selection or END :          [                    ]

       CONTACTS    MAINT     DRILL    EXECINQ   REPORTS  CAPT OFF   VIEW   CRM.MENU  VRM.MENU
  HELP  OK/END     INSERT   LDELETE   PREV PG   NEXT PG  INQUIRY   CANCEL    Off              Popup
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Master File Maintenance Function Keys

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.

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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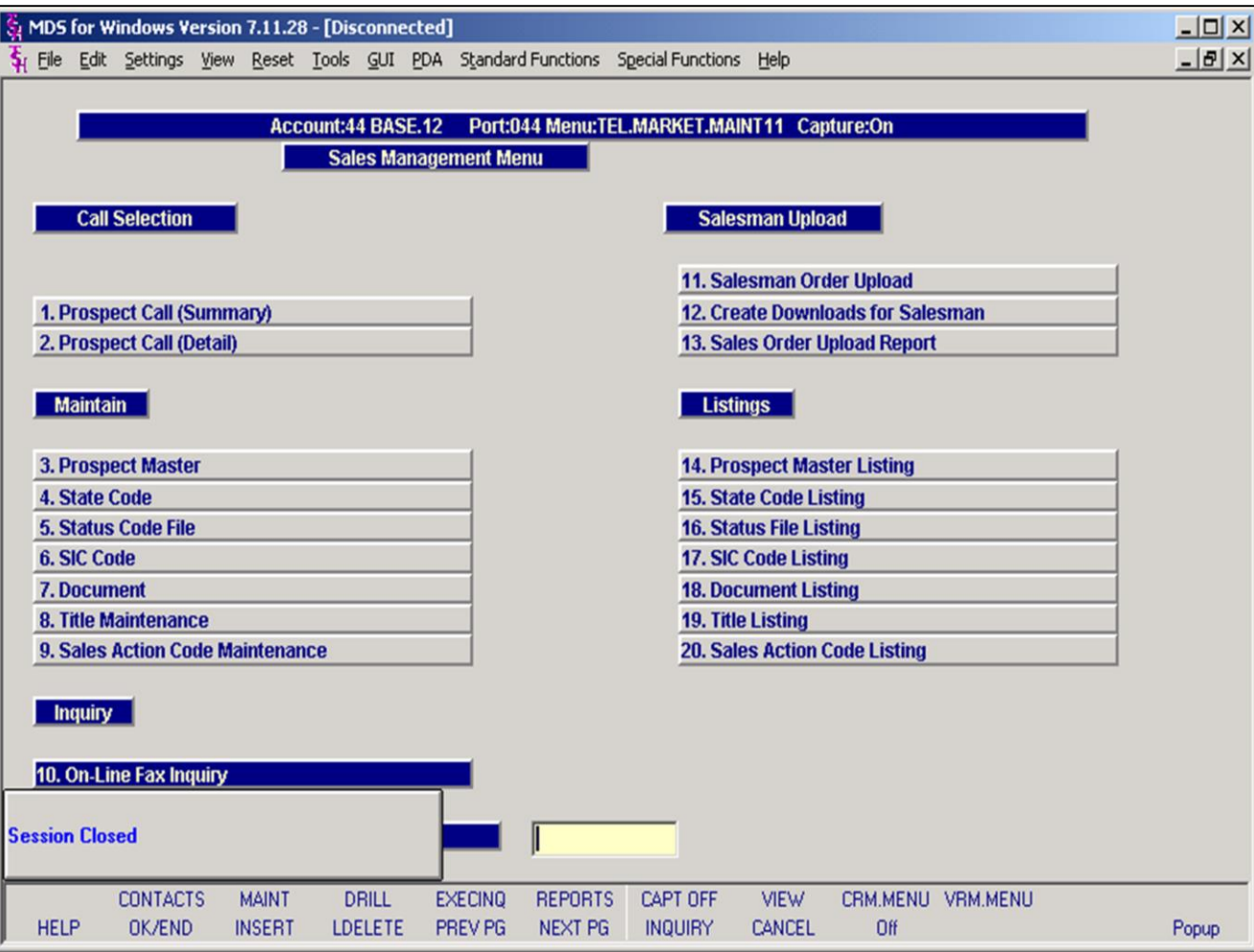
Master File Maintenance Function Keys

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.
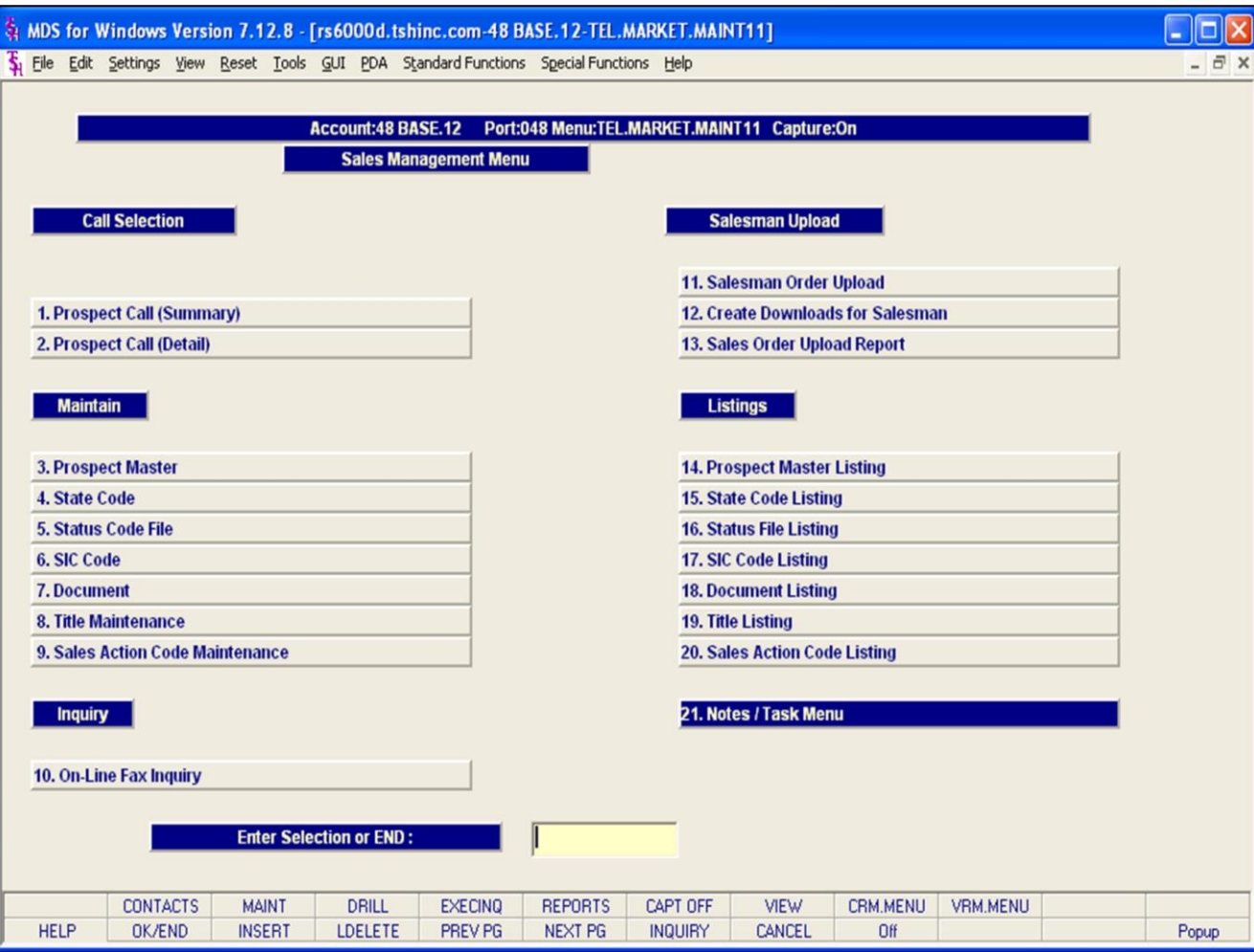
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MDS for Windows Version 7.11.28 - [RS6000D-13 BASE.12-MENU]                          _ □ X
File  Edit  Settings  View  Reset  Tools  GUI  PDA  Standard Functions  Special Functions  Help   _ 日 X

              Account:13 BASE.12    Port:013 Menu:MENU         Capture:On
                   Master Distribution System              Release 12.90502
                            Main System Selector

         1. Order Entry and Invoicing            15. End of Day Processing
         2. Order Entry Reports                  16. End of Month Processing
         3. Accounting Registers                 17. End of Year Processing
         4. Accounts Receivable                  18. Inquiries
         5. Price Maintenance/Price Books        19. Utilities
         6. Costing/Inventory Evaluation         20. Recall Generator
         7. Purchasing                           21. Special Programs
         8. Inventory/Warehouse Procedures       22. Electronic Mail
         9. Physical Inventory Procedures        23. Purge and Fix Programs
        10. Inventory Management                 24. EDI Menu
        11. Sales Analysis                       25. Service Menu
        12. File Maintenance                     26. Raw Materials
        13. Accounts Payable                     27. Sales Management Menu
        14. General Ledger


                 Enter Selection or END :        [              ]

        CONTACTS    MAINT     DRILL     EXECINQ   REPORTS  CAPT OFF    VIEW    CRM.MENU VRM.MENU
  HELP  OK/END      INSERT    LDELETE   PREV PG   NEXT PG  INQUIRY     CANCEL  Off                Popup
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Sales Management Menu

The sales management menu can be found from the main system selector.

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MDS for Windows Version 7.12.8 - [rs6000d.tshinc.com-48 BASE.12-TEL.MARKET.MAINT11]

File Edit Settings View Reset Tools GUI PDA Standard Functions Special Functions Help

Account:48 BASE.12   Port:048 Menu:TEL.MARKET.MAINT11 Capture:On

Sales Management Menu

Call Selection

1. Prospect Call (Summary)
2. Prospect Call (Detail)

Maintain

3. Prospect Master
4. State Code
5. Status Code File
6. SIC Code
7. Document
8. Title Maintenance
9. Sales Action Code Maintenance

Inquiry

10. On-Line Fax Inquiry

Salesman Upload

11. Salesman Order Upload
12. Create Downloads for Salesman
13. Sales Order Upload Report

Listings

14. Prospect Master Listing
15. State Code Listing
16. Status File Listing
17. SIC Code Listing
18. Document Listing
19. Title Listing
20. Sales Action Code Listing

21. Notes / Task Menu

Enter Selection or END :

HELP	CONTACTS	MAINT	DRILL	EXECINQ	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU		
	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup

Sales Management Guide

The sales management menu provides access to many sales management features.

The salesman upload functionality will not be addressed in this training guide. Please see the salesman laptop guide for more information.

The notes/task menu will be covered in the customer relationship management guide.

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Prospect Maintenances

Maintenances must be performed to enter prospect call details. Some maintenances must be performed before you can enter a new prospect into the prospect master maintenance. A valid Prospect Master record is required to enter call details.

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MDS for Windows Version 7.12.8 - [rs6000d.tshinc.com-3548 DEMO.12-PROSPECT.MAST.MAINT012S1]

File Edit Settings View Reset Tools GUI PDA Standard Functions Special Functions Help

PROSPECT MASTER MAINTENANCE

Ex Prospect#	UMC		Internal#	100139	Created	05/29/01

1.Name — UNIVERSITY MEDICAL CENTER
2.Address1 — ACCOUNTS PAYABLE/TRAVEL
3.Address2 — 400 BROADWAY AVE
4.Address3 —
5.City — NEW YORK CITY   NY   10016-1460
6.Slsm — 001   SY FERTIG
7.Business — 01   HOSPITALS
8.Comments —
9.Phone# — 212-777-1111   Ext
10.Fax# — 212-817-1111
11.E-Mail — sf@tshinc.com
12.WebUrl —
13.SIC Code —
14.Contact1 — JOHN DOE
    Title1 —
15.Contact2 — MARY DOE
    Title2 —
16.Status Cd — CUS   CUSTOMER
17.Follow Up — 05/22/03   12:00

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :   XXXXXX   PAGE 1 OF 2

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

Prospect Master Maintenance

The prospect master is dependent on the state code and status codes they are required fields and must be entered before completing a new Prospect Master record. If optional maintenances have not been performed the fields and inquiries that are available may not be used until they are completed.

Ex Prospect # -At the prospect number prompt you can enter the prospect number, enter the beginning prospect number to initiate the lookup routine, click on the "INQUIRY" icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Name – This is a required field. Enter the prospect name.

Address1 – Enter the first line of the address field for the prospect

Address2 –Additional lines for entering the prospect address are provided.

Address3 - Additional lines for entering the prospect address are provided.

City –Enter the city where the prospect company resides. Enter the state, and zip code of the prospect address.

Slsmn – Enter the salesman code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the salesman code.

Business –This field is populated from the customer class it is the same field for customer class that is found in the Customer Master file. Enter the business code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for

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the business code.

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Prospect Master Maintenance

PROSPECT MASTER MAINTENANCE

Ex Prospect#	UMC		Internal#	100139	Created	05/29/01
1.Name	UNIVERSITY MEDICAL CENTER					
2.Address1	ACCOUNTS PAYABLE/TRAVEL					
3.Address2	400 BROADWAY AVE					
4.Address3						
5.City	NEW YORK CITY	NY	10016-1460			
6.Slsm	001	SY FERTIG				
7.Business	01	HOSPITALS				
8.Comments						
9.Phone#	212-777-1111	Ext				
10.Fax#	212-817-1111					
11.E-Mail	sf@tshinc.com					
12.WebUrl						
13.SIC Code						
14.Contact1	JOHN DOE					
Title1						
15.Contact2	MARY DOE					
Title2						
16.Status Cd	CUS	CUSTOMER				
17.Follow Up	05/22/03	12:00				

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :   XXXXXX   PAGE 1 OF 2

UserFile

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

Comments – This is a text entry field you may enter in any comments you may have about the prospect in general.

Phone# - Enter the phone number for the prospect

Fax# - Enter the fax number for the prospect

E-Mail – Enter an email address for the prospect

WebUrl – Enter the corporate website address for the prospect

SIC Code – Enter the standard industry code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the standard industry code.

Contact1 – Enter the name of the contact for the prospect.

Title1 – Enter the title of the contact for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the title.

Contact2 – Enter the name of an additional contact for the prospect.

Title2 - Enter the title of the additional contact for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the title.

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Prospect Master Maintenance

Status Cd – Enter the status code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the status code.

Follow Up – Enter a date to follow up with the prospect. This date will be used on the prospect call summary inquiry to determine prospects to follow up with by date.

Lead Source – Enter the information of where the lead was generated an example would be the name of a trade show, website, or direct marketing.

Current System – Enter the name of the system the prospect is now using.

Number of Users – Enter the number of users that the prospect currently includes in their system use.

Sales Dollars – Enter the number of sales dollars that prospect produces each year.

Number of Employees – Enter the number of people that the prospect employs.

Close Date – Enter the close date of the prospect for example the date the sale was completed or rejected.

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Prospect Master Maintenance

Proposal Date – Enter the date that the proposal was sent to the prospect.

Competition – Enter the names of any direct competitors that the prospect is considering.

Next Step – Enter the next step to take in the sales cycle.

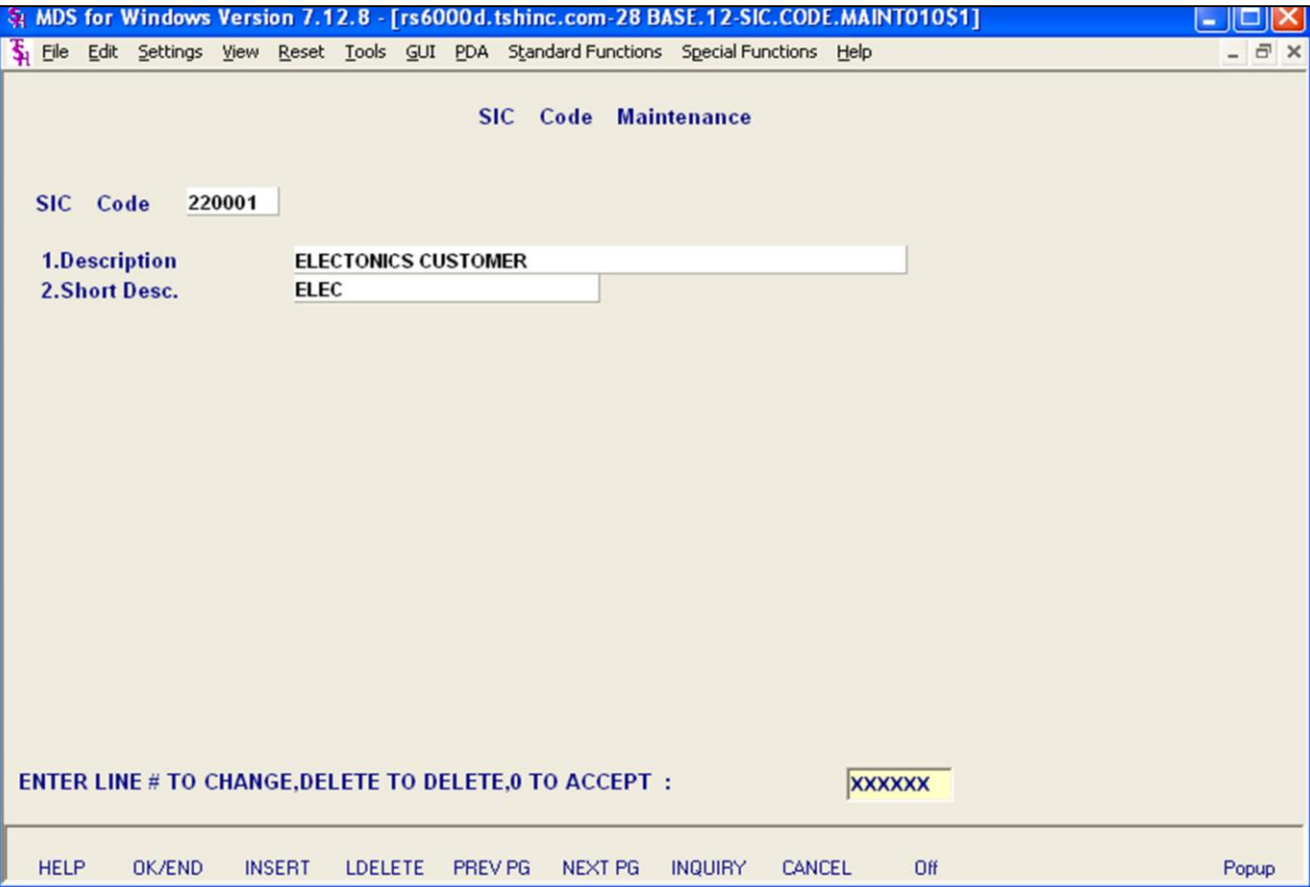**ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:**

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 *** to delete an existing record

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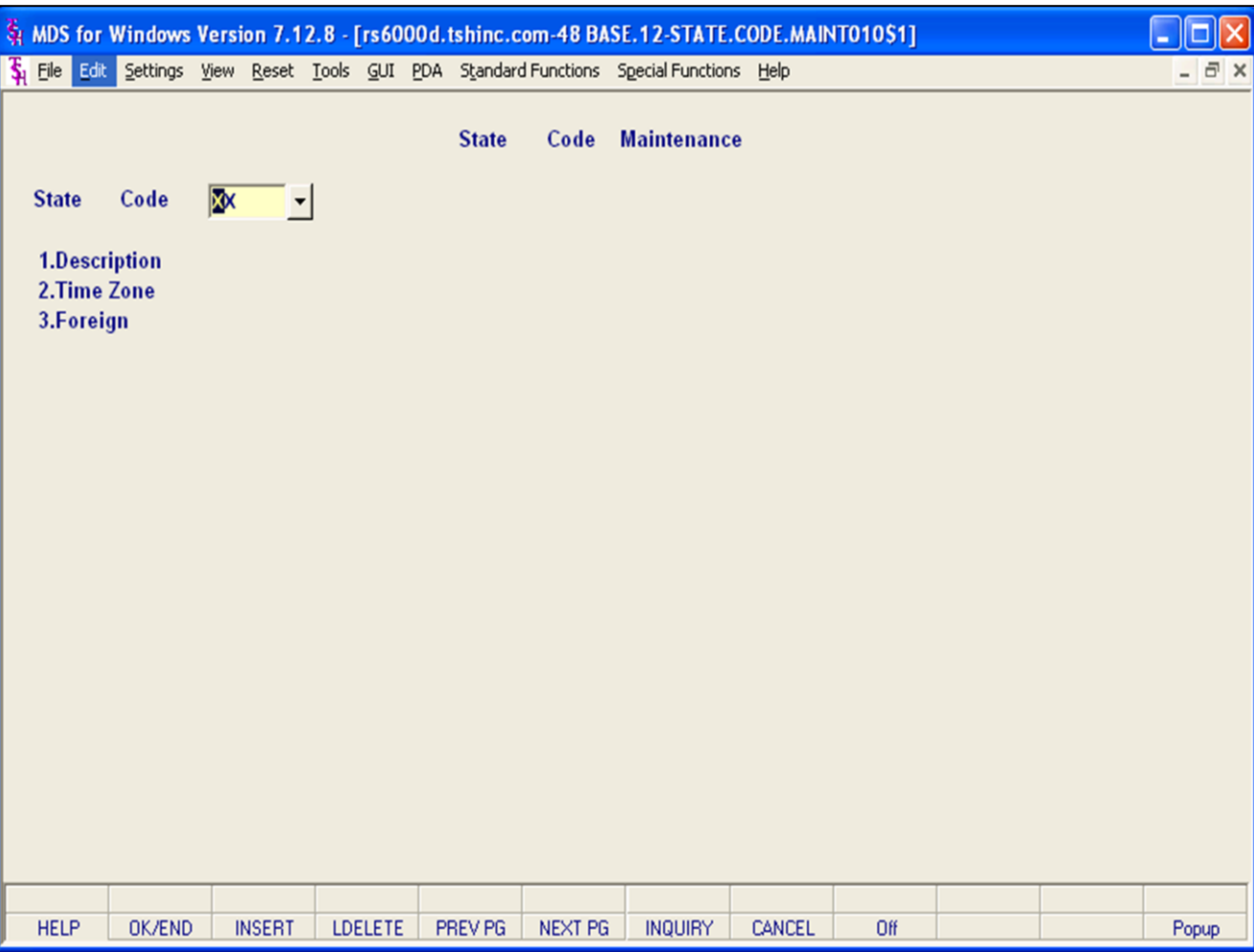
State Code Maintenance

State code maintenance is required to enter a new prospect in the prospect master maintenance. In many cases the state codes are preloaded with your system install. Please verify they are available.

State Code - Enter the state code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the state code.

Description – Enter the description for the state code.

Time Zone – Enter the time zone for this state. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the time zone.

Foreign – Enter "Y" or "N" to specify if the state code is foreign.
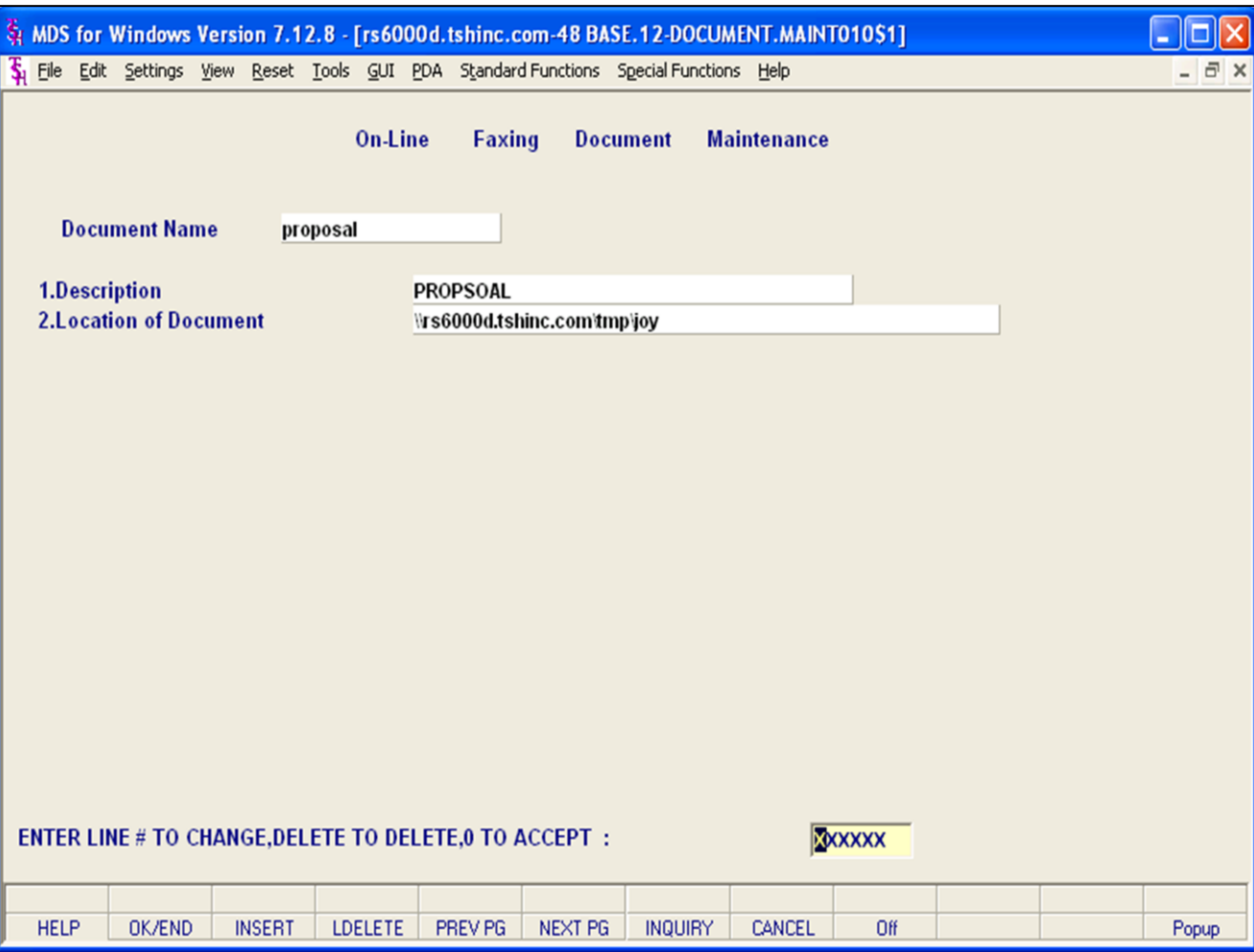
ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

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.

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

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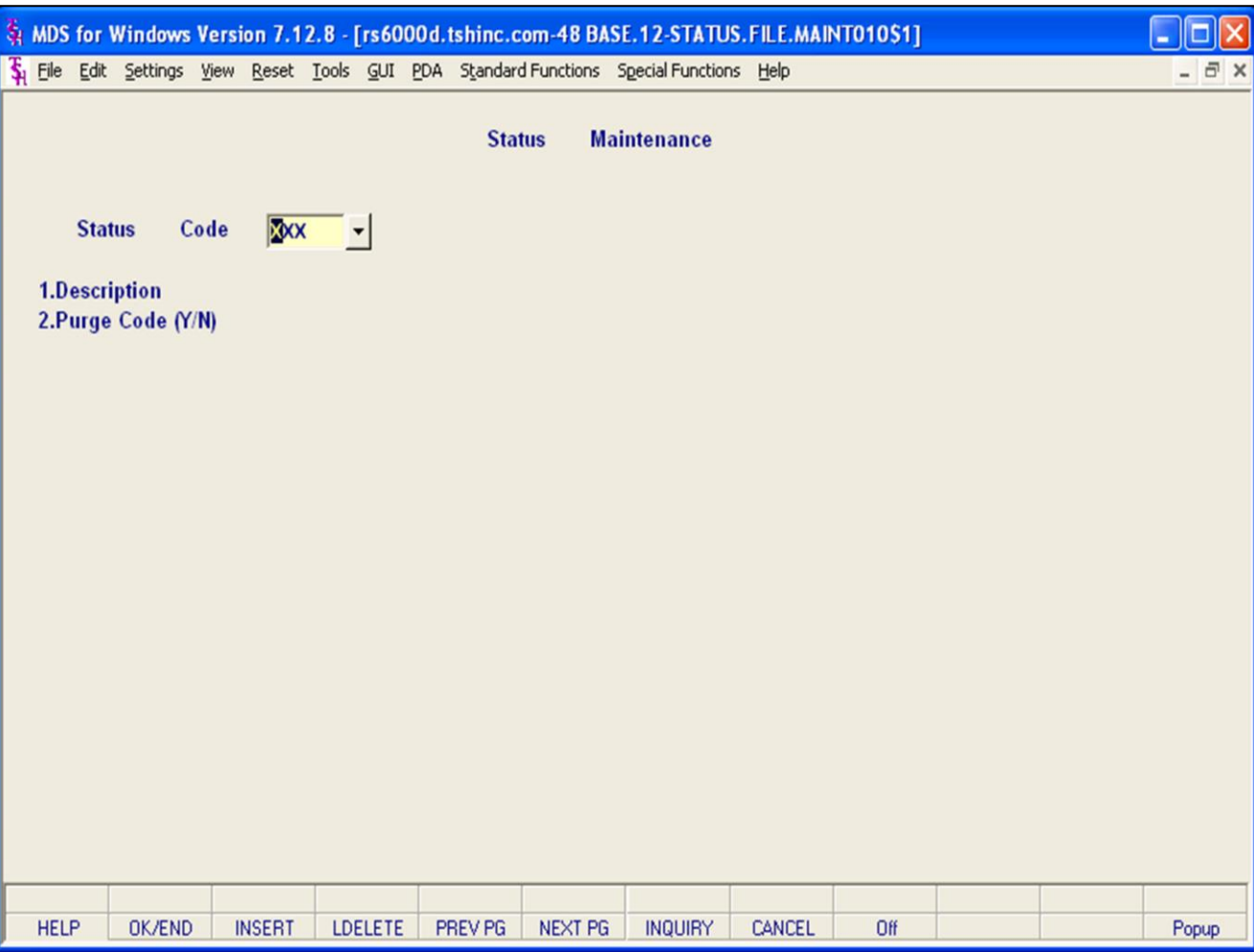
Status Code Maintenance

Status code maintenance is required to enter a new prospect in the prospect master maintenance

Status Code - Enter the 1,2, or 3 digit status code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the status code.

Description – Enter the description for the status code.

Purge Code (Y/N) – Enter "Y" or "N" for the purge code. The default is "N" The purge code will be used to identify a specific status code as ready to be deleted from the system.

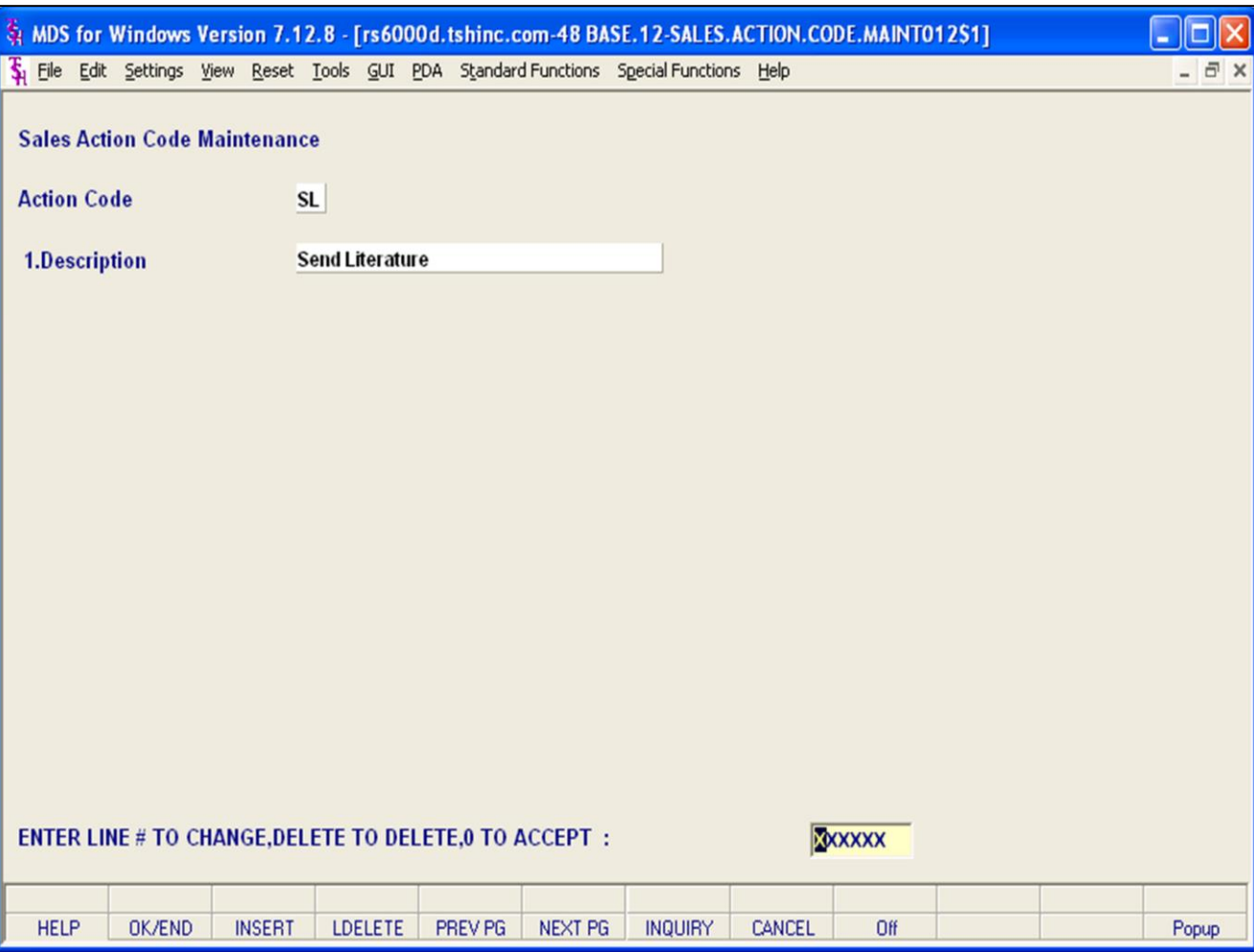**ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:**

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 *** to delete an existing record

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SIC Code Maintenance

Standard industry code is not a required field for the prospect master maintenance.

SIC Code – Enter the standard industry code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the standard industry code.

Description – Enter the description for the standard industry code.

Short Desc. – Enter the short description for the standard industry 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.

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

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Screen text:

SIC Code Maintenance

SIC Code   220001
1.Description   ELECTONICS CUSTOMER
2.Short Desc.   ELEC

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

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

Sales Management Training Guide   15

Document Maintenance

Document maintenance is not required to enter a new prospect. Document maintenance allows a user to define each document that will be faxed. You cannot fax the document without defining it in document maintenance.

Document Name - Enter the document name. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for an existing document.

Description – Enter the description for the document.

Location of Document – Enter the location of where your document exists on your server.

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 *** to delete an existing record

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Title Maintenance

Title maintenance is not a required field for entering a new Prospect Master record. Title maintenance allows the user to define a title for each contact in the Prospect Master records.

Title Code - Enter the 1, or 2 digit title code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the title code.

Description – Enter the description for the title 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.

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

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Sales Action Code

Sales action code's are not required to enter a new prospect or a new Prospect Call Detail record. Sales action code's can be used to filter prospects in the prospect call summary inquiry. The sales action code maintenance provides a brief description for the next action to be taken in the sales process.

Action Code - Enter the 1 or 2 digit sales action code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the sales action code.

Description – Enter the description for the sales 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.

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

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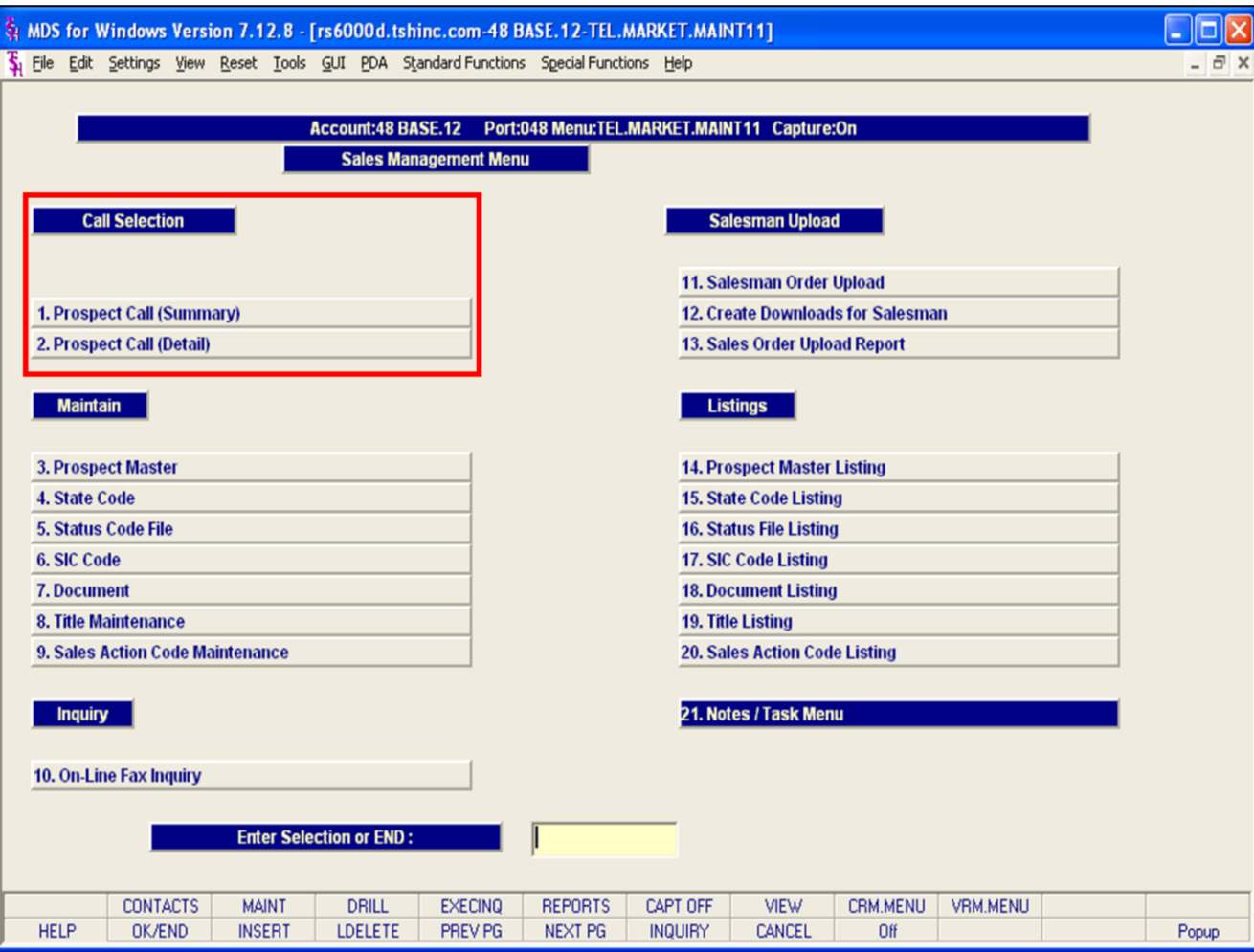
Call Selections

Call selections provide the prospect call summary inquiry and drill down as well as the prospect call (detail) entry screen. Prospect master maintenances must be completed before utilizing the call selections.

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Prospect Call (Summary)

The Prospect call summary is an interactive inquiry. An overview of prospect results can be displayed and a user may choose to drill down to the prospect call detail from the inquiry.

The system maintains and updated "prospect list" by sales rep, and identifies which prospects to contact and in what sequence. The selected prospects are displayed in the requested sequence, in summary mode. The operator can then drill down, by clicking on the prospect number, to obtain detailed information.

Prospect Sls – Enter the salesman code for this inquiry. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the salesman code.

Prospect# - At the prospect number prompt you can enter the prospect number, enter the beginning prospect number to initiate the lookup routine, click on the "INQUIRY" icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Prospect Name – Enter the Prospect Name. Use the "ENTER" key to bypass this field criteria.

State Range

1.Enter the starting 2 digit state range. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the state code.

2.Enter the ending 2 digit state range. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the state code.

Use the "ENTER" key to bypass this field criteria.

Notes:

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Prospect Call (Summary)

Zip Code

1. Enter the Starting Zip Code Range.

2. Enter the Ending Zip Code Range.

Use the "ENTER" key to bypass this field criteria.

Phone Number – Enter the prospect phone number. Use the "ENTER" key to bypass this field criteria.

Follow Up Dt

1. Enter the starting follow up date range, or click on the down arrow next to the field to display the calendar

2. Enter the ending follow up date range, or click on the down arrow next to the field to display the calendar

Use the "ENTER" key to bypass this field criteria.

Status - Enter the status, or click on the down arrow next to the field to display a list of valid status codes and their descriptions. Use the "ENTER" key to bypass this field criteria.

Business - Enter the business code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the business code.

Source – Enter the source. Use the "ENTER" key to bypass this field criteria.

Notes – Enter part of a note comment. Use the "ENTER" key to bypass this field criteria.

Prospect Call (Summary)

After the user has entered the summary criteria that is to be displayed the bottom half of the inquiry screen will populate with results.

The prospect number, name, city, state, status code, follow up date, and follow up time are populated from the Prospect Call Detail record.

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

The user can enter line number to display Prospect Call Detail records

The user may refresh the inquiry to a begin a new inquiry by typing 'S' and pressing <ENTER>.

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

Screen content:

MDS for Windows Version 7.12.8 - [rs6000d.tshinc.com-3548 DEMO.12-TEL.MARK.CALL.SUMM010$1]

File Edit Settings View Reset Tools GUI PDA Standard Functions Special Functions Help

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

Ln#	Prospect #	Name	City	St	Stat	Follow Up Date	Time
1.	UMC	UNIVERSITY MEDICAL CE	NEW YORK CITY	NY	CUS	05/22/03	12:00
2.	TRINITY	TRINITY MEDICAL CENTE	STATEN ISLAND	NY	PRO	08/04/03	14:00
3.	ABCOFS	ABCO FINANCIAL SERVIC	HILTON HEAD	SC	PRO	09/17/03	13:00
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							

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

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

Notes:

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Prospect Call Summary Function Keys

Pros Look – The Prospect Look up function is available by clicking on the "Pros look" icon or by pressing the 'F1' function key. This function allows the operator to use the Inquiry to look up a prospect.

Res #days – The Reschedule Number of Days function is available by clicking on the "Res #days" icon or pressing the Shift "F2" function key. This function gives the user the ability to modify the search criteria for the current prospect summary by the specified number of days or follow up date.

Search – The Search function is available by clicking on the "Search" icon or pressing the Shift "F3" function key. This function initiates a new prospect call summary look up.

Action – The Action function is available by clicking on the "Action" icon or pressing the Shift "F4" function key. This function gives the user to modify the search criteria for the current prospect summary by the specified "Action" code**.**

List – The List function is available by clicking on the "List" icon or pressing the Shift "F5" function key. This function gives the operator the ability to bring up a selection of prospects that were saved to a list.

Mds Inq – The MDS Inquiry is available by clicking on the "MDS Inq" icon or pressing the Shift "F7" function key. This function launches the MDS Inquiries menu.

Cust Ord – The Customer Order Inquiry is available by clicking on the "Cust Order" icon or pressing the Shift "F7" function key. This function launches the MDS Customer Order Inquiry.

Cust Hist – The Customer History Inquiry is available by clicking on the "Cust Hist" icon or pressing the Shift "F8" function key. This function launches the MDS Customer Sales History Inquiry.

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Prospect Call Detail

The prospect call detail maintenance allows users to enter specific details related to a prospect master record. This menu option allows the user to enter a valid prospect that has been entered in the prospect call maintenance. Information from the prospect master is displayed in fields 1 through 16.

To the right of the "Prospect#" field a highlighted box labeled "CUSTOMER" is displayed. This identifies the current prospect as an existing customer. The credit limit and credit hold information fields are populated from the Customer Master record. The AR balance field is populated from the Customer Detail record.

Fields from the prospect master maintenance may be maintained from this screen. Click on the appropriate function key or field to make changes.

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Prospect Call Detail

Adding a Note

Clicking the "Add Note" icon or pressing 'F5' function key brings the user to notes section.

The user must enter a valid operator code OR press Enter and the system will populate the operator code for the user that is currently logged in.

Press Enter to access the "Date" field enter a date for the note in the "Date" field or press Enter and the system will enter the current date.

Press Enter to access the "Time" field enter a time for the note in the "Time" field or press Enter and the system will enter the current time.

Press Enter to access the "Cont" field enter a contact name for the note in the "Contact" field or press Enter and the system will enter the name of the current operator that is logged in.

Press Enter to access the the "Notes/Text" field. The user may then enter free form text. The User may then click "OK" to save the Note or "Cancel" to cancel the note.

The user must then choose a valid action that has been entered in the sales action code maintenance.

Press Enter to access the "Comp" field enter the completion date of the action or press Enter and the system will enter the current date.

Press Enter to access the "FollowUp" field enter a follow up date for the prospect.

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Sales Management Prospect Call Detail

Prospect#	UMC	"CUSTOMER"
1.Comment		
2.Name	UNIVERSITY MEDICAL CENTER	
3.Addr1	ACCOUNTS PAYABLE/TRAVEL	
4.Addr2	400 BROADWAY AVE	
5.Addr3		
6.City	NEW YORK CITY	NY Country
7.Zip	10016-1460	
8.Slsm	001 SY FERTIG	
9.Bus	01 HOSPITALS	
10.E-Mail	sf@tshinc.com	
11.WebUrl		

Credit Limit 50,000 Total
Credit Hold N Current
A/R Balance 7,681.13
12.Phone# 212-777-1111 Ext
13.Fax# 212-817-1111
14.Source
15.SIC Code
16.Contact1 JOHN DOE
Title1
7.Status CUS CUSTOMER
8.FollowUp 05/22/03 12:00
19.Next Step

20.	Oper	Date	Time	Notes/Text
1.	SY	05/21/03	22:59	Puchased a new exb-5000 pitched supplies
Contact	Fran Drescher			
Act		Comp		
2.				
Contact				
Act		Comp		

Enter Line Number to Change or '0' to Accept: XXXXXX PAGE 1 OF 3

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

Prospect Call Detail

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 *** to delete an existing record

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Prospect Call Detail Function Keys

Ord Entry – The Prospect Look up function is available by clicking on the "Pros look" icon or by pressing the Shift 'F1' function key. This function allows the operator to use the inquiry to look up a prospect.

Prev Rec – The Previous Rec function is available by clicking on the "Prev Rec" icon or by pressing the Shift 'F2' function key. This function will display the previous record associated with the current prospect

Next Rec – The Next Rec function is available by clicking on the "Next Rec" icon or by pressing the Shift 'F3' function key. This function will display the next record associated with the current prospect

Cred App – The Cred App function is available by clicking on the "Cred App" icon or by pressing the Shift 'F4' function key. This will launch the credit application print program for the current prospect.

Add Note – The Add Note function is available by clicking on the "Add Note" icon or by pressing the Shift 'F5' function key. This function will give the user the ability to add a new note for the current prospect.

Mds Inq – The MDS Inq function is available by clicking on the "Mds Inq" icon or by pressing the Shift 'F6' function key. This function displays the MDS Inquiries menu.

Cust Ord – The Cust Order Inquiry function is available by clicking on the "Cust Order" icon or by pressing the Shift 'F7' function key. This function brings the user to the MDS Customer Order Inquiry.

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Prospect Call Detail Function Keys

Cust Hist – The Customer History function is available by clicking on the "Cust Hist" icon or pressing the Shift 'F8' function key. This function launches the MDS Customer Sales History Inquiry.

Quote –The Quote function is available by clicking on the "Quote" icon or pressing the Shift 'F9' function key. This function launches the MDS sales quote program.

Quote Inq – The Quote Inquiry is available by clicking on the "Quote Inq" icon or pressing the Shift 'F10' function key. This function launches the MDS customer sales quote Inquiry.

Email – The Email function is available by clicking on the "Email" icon or pressing the Shift 'F11' function key. This function launches with a blank new message.

Contacts – The "Contacts" function is available by clicking on the "Contacnts" icon or pressing the Shift 'F12' function key. The contacts page of the sales management prospect call detail screen is displayed for the current prospect.

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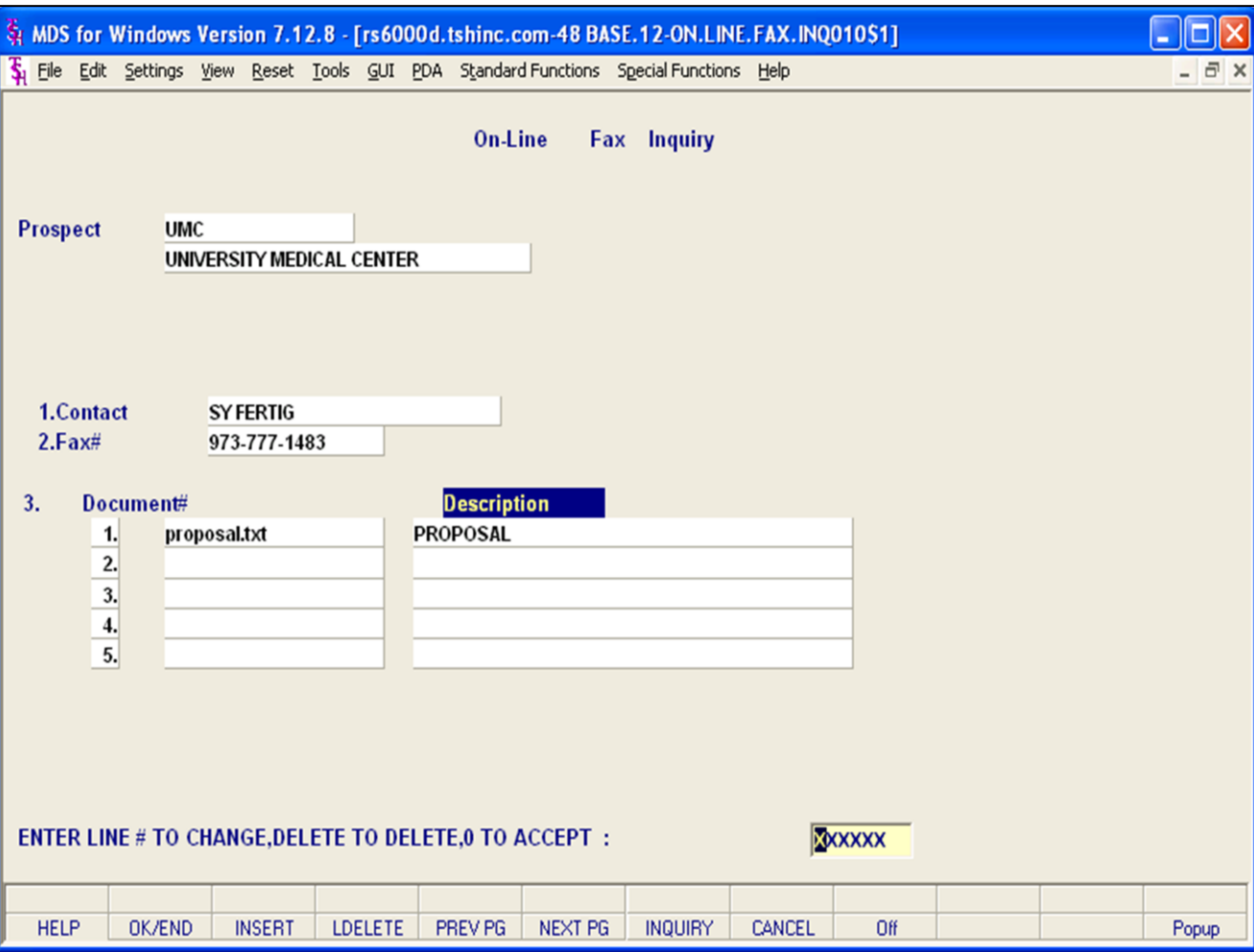
On-Line Fax Inquiry

The online fax Inquiry allows users to fax documents that have been specified in the document maintenance entry.

Prospect – At the prospect number prompt you can enter the prospect number, enter the beginning prospect number to initiate the lookup routine, click on the "INQUIRY" icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Contact - Contact # 1 from the Prospect Master record will be displayed in field 1. You may override the contact information.

Fax# – The Fax Number from the Prospect Master record will be displayed in field 1. You may override the fax information.

Document # - At the Document# prompt you can enter the document number, enter the beginning document number to initiate the lookup routine, click on the "INQUIRY" icon or press the 'F7' function key which opens the pop-up inquiry box to search for the document.

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.

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

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Listings

The listings will provide a report of each of the maintenances.

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Prospect Master Listing

The Prospect master listing provides a listing of existing prospect master records.

The user may press <RETURN> to process the prospect master listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".

```
PAGE    1        *************** PROSPECT MASTER FILE LISTING   ********        DATE 11:18:46am  29 Dec 2006

PROSPECT.MAST A.PROSPECT.NO NAME AND ADDRESS......... Contact1:.............. PROS.PHONE.NO PROS.SLSM STATUS.DATE STATUS.TIME

  000129        000129       LENNON PEEK SURGICAL     ROBERT KING            718-828-6300       900    12/12/95
                             1511 BASSETT AVENUE

                             BRONX          NY 10461

  000378        000378       SHRINK PACKAGING SYSTEMS MRS. NANCY K. GIEBER    908-753-2525       960
                             15 PROGRESS STREET

                             EDISON         NJ 08820

  000565        000565       FORD MODEL AGENCY        JERRY FORD             212-753-6500       999    01/01/99
                             344 EAST 59TH STREET

                             NEW YORK       NY 10022

  000836        000836       GOOD FRIEND ELECTRIC     RICHARD BOLOTSKY       732-349-4100       960    05/05/95
                             265 HIGHWAY 37 EAST

                             TOMS RIVER     NJ 08753

  000932        000932       PALERMO SUPPLY COMPANY   JIM MCMORROW           201-387-1141       999    01/01/99
                             369-373 ANDERSON AVENUE

                             FAIRVIEW       NJ 07022

  001106        001106       GROSSMAN PAPER & PLASTIC MR. ROBERTO NUNEZ      973-371-6500       960    01/01/99
                             673 SOUTH 21ST STREET

                             IRVINGTON      NJ 07111

  001160        001160       ALLIED OFFICE PRODUCTS   JERRY BEDRIN           201-393-9100       960
                             65 ROUTE 17 SOUTH

                             HASBROUCK HEIGH NJ 07604

  001161        001161       ACH TRIMSOURCE           WEBB SMITH             212-643-7300       960
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State code Listing

The state code listing provides a listing of existing state codes.

The user may press <RETURN> to process the state code listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".

Adobe Reader - [CAPT!14243!40880.4127!028.pdf]

File   Edit   View   Document   Tools   Window   Help

66%

PAGE	1 **STATE CODE LISTING**	DATE 11:18:48am 29 Dec 2006

STATE	DESC.....................	TIME.ZONE	TIME.ZONE.DESC.
AB	ALBERTA	1	EASTERN TIME
AK	ALASKA		
AL	ALABAMA		
AR	ARKANSAS		
AS	UNKNOWN		
AZ	ARIZONA	2	CENTRAL TIME
CA	CALIFORNIA		
CM	UNKNOWN		
CO	COLORADO	2	CENTRAL TIME
CT	CONNECTICUT		
CZ	CANAL ZONE		
DC	DISTRICT OF COLOMBIA		
DE	DELAWARE		
FF	FOREIGN		
FL	FLORIDA		
GA	GEORGIA		
GU	GUAM		
HI	HAWAII		
IA	IOWA		
ID	IDAHO		
IL	ILLINOIS		

1 of 3

Notes:

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Adobe Reader - [CAPT!14243!40920.9601!028.pdf]

File  Edit  View  Document  Tools  Window  Help


PAGE    1 **STATUS FILE LISTING** DATE 11:18:51am  29 Dec 2006


STATUS.CODE DESC................ PURGE.CODE

55          1                    N

ABC         STATUS-DESC-ABC      Y

DEF         STATUS-DESC-DEF      N

GHI         STATUS-DESC-GHI      Y

OPN         ACTIVE PROSPECT      N


5 records listed.


11.00 x 8.50 in                  1 of 1
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Status File Listing

The status file listing provides a listing of existing status codes.

The user may press <RETURN> to process the status code file listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".

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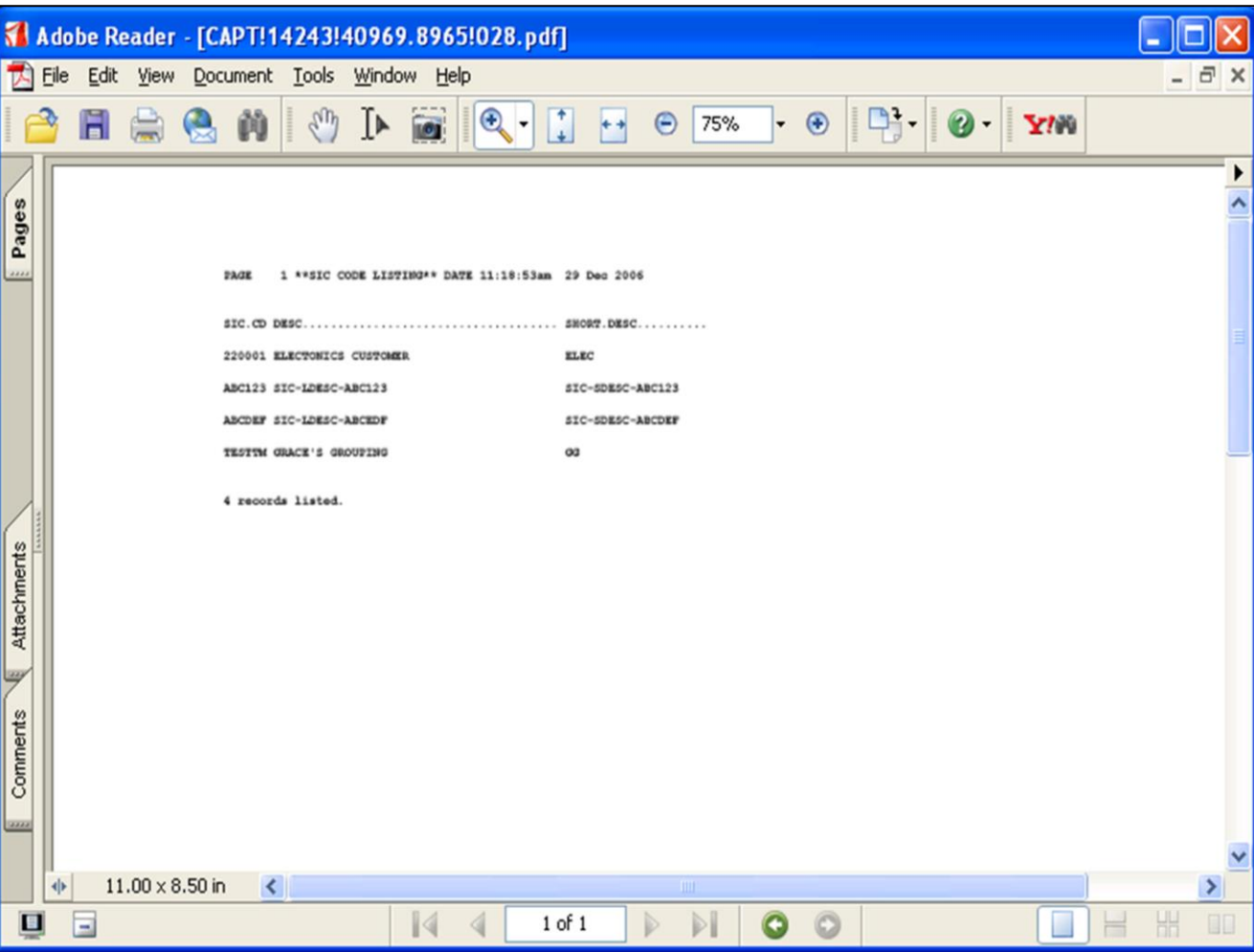
SIC Code Listing

The SIC listing provides a listing of existing standard industry codes.

The user may press <RETURN> to process the SIC code listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".

Adobe Reader - [CAPT!14243!40969.8965!028.pdf]

File Edit View Document Tools Window Help

```
PAGE    1 **SIC CODE LISTING** DATE 11:18:53am  29 Dec 2006


SIC.CD DESC.................................... SHORT.DESC..........

220001 ELECTONICS CUSTOMER               ELEC

ABC123 SIC-LDESC-ABC123                  SIC-SDESC-ABC123

ABCDEF SIC-LDESC-ABCEDF                  SIC-SDESC-ABCDEF

TESTTM GRACE'S GROUPING                  GG


4 records listed.
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11.00 x 8.50 in

1 of 1

Notes:

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Document Listing

The document listing provides a listing of existing documents.

The user may press <RETURN> to process the document listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".
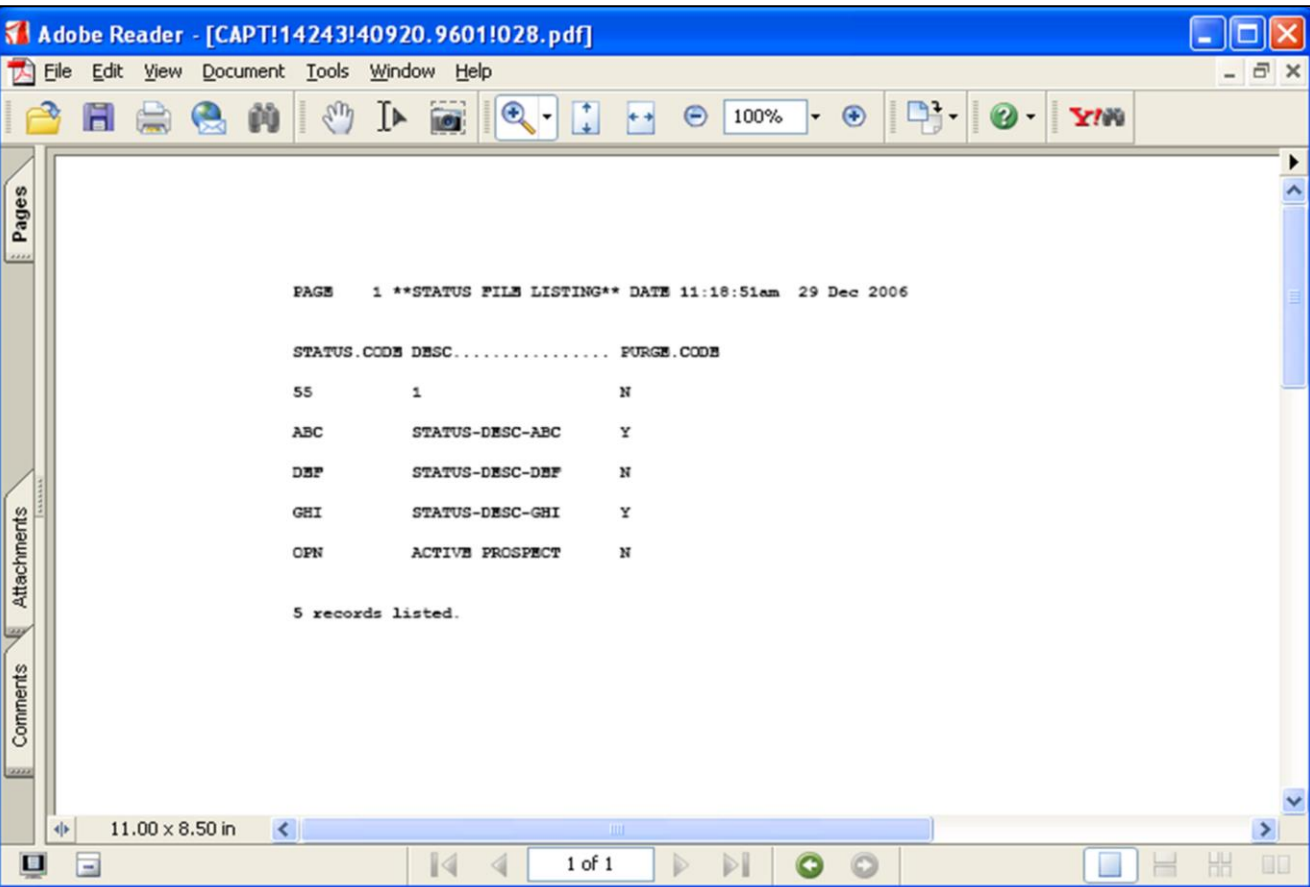
Adobe Reader - [CAPT!14243!41000.5698!028.pdf]

File Edit View Document Tools Window Help

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PAGE   1 **DOCUMENT LISTING** DATE 11:18:56am  29 Dec 2006


DOCUMENT.NAME.. DESC....................... LOC.DOCUMENT......................

CUST.MAST       CUSTOMER MASTER FILE        /u1/accts/BASE.12

DOC.11111111111 DESCRIPTION.DOC.11111111111111 ENDATION.DOC.1111111111111111111111111111

DOC.22222222222 DESC.DOC.22222222222222222222 LOC.DOC.222222222222222222222222222222222

DOC.33333333333 DESC.DOC.33333333333333333333 LOCATION.DOC.3333333333333333333333333333

DOC.44444444444 DESC.DOC.44444444444444444444 LOCATION.DOC.4444444444444444444444444444

DOC.55555555555 DESC.DOC.55555555555555555555 LOCATION.DOC.5555555555555555555555555555

DOC.66666666666 DESC.DOC.66666666666666666666 LOCATION.DOC.6666666666666666666666666666

PRC.LIST        PRODUCT PRICE LIST          /u1/accts/tsh

PROPOSAL        PROPOSAL                    \\rs6000d.tshinc.com\tmp\joy

SIC             SIC LISTING                 /tmp

V1.TXT          TEST FOR FAXING             /u1/accts/KONICA.10

hello.txt       HELLO.TXT FOR FAXINIG       /u1/accts/BASE.10

proposal.txt    PROPOSAL                    \\rs6000d.tshinc.com\tmp\joy

v1.txt          TEST FOR FAXING FROM KONICA /u1/accts/KONICA.10


14 records listed.
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1 of 1

Notes:

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Title Listing

The title listing provides a listing of existing title codes.

The user may press <RETURN>, click the "OK/END" icon or use the 'F2' function key to process the title code listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".
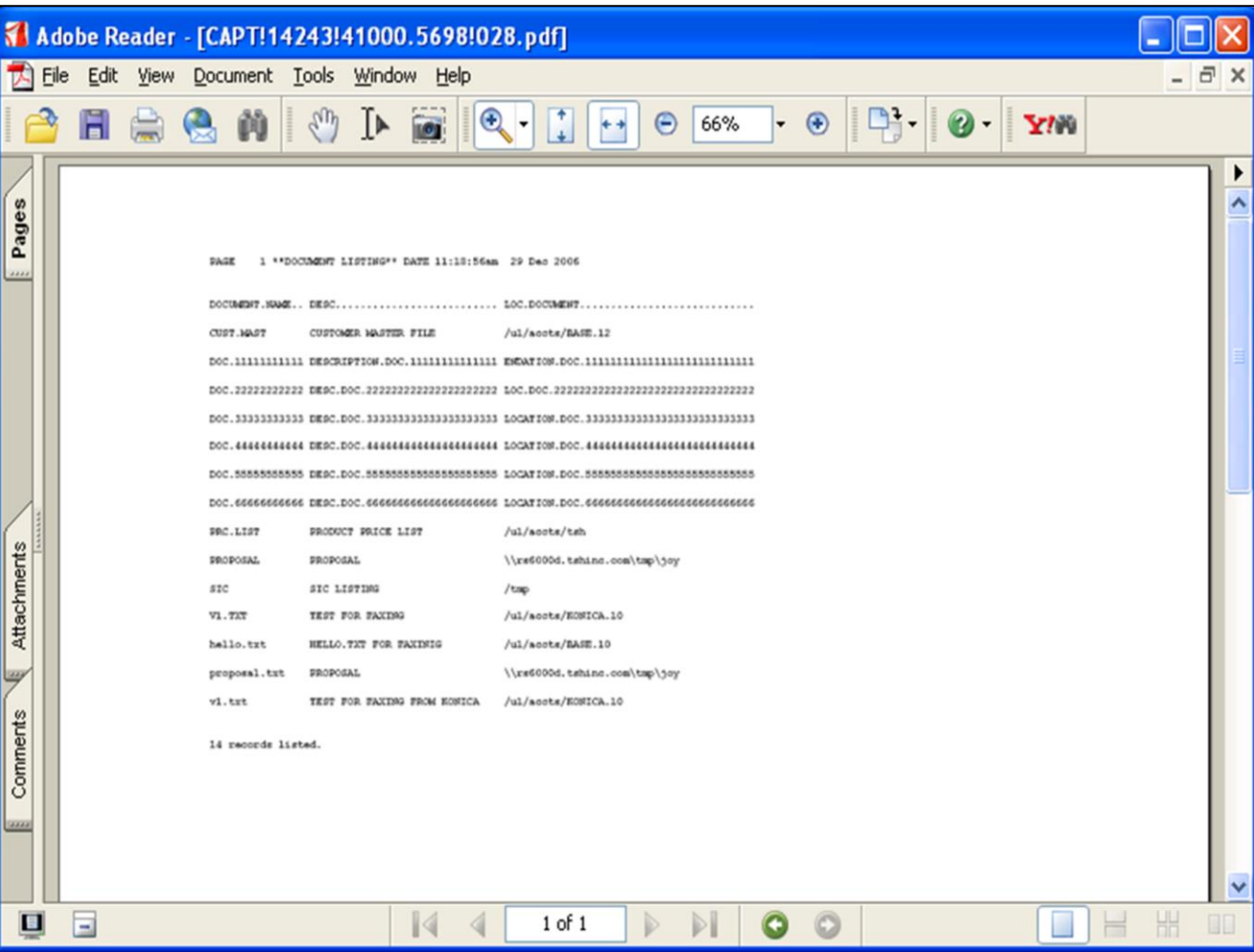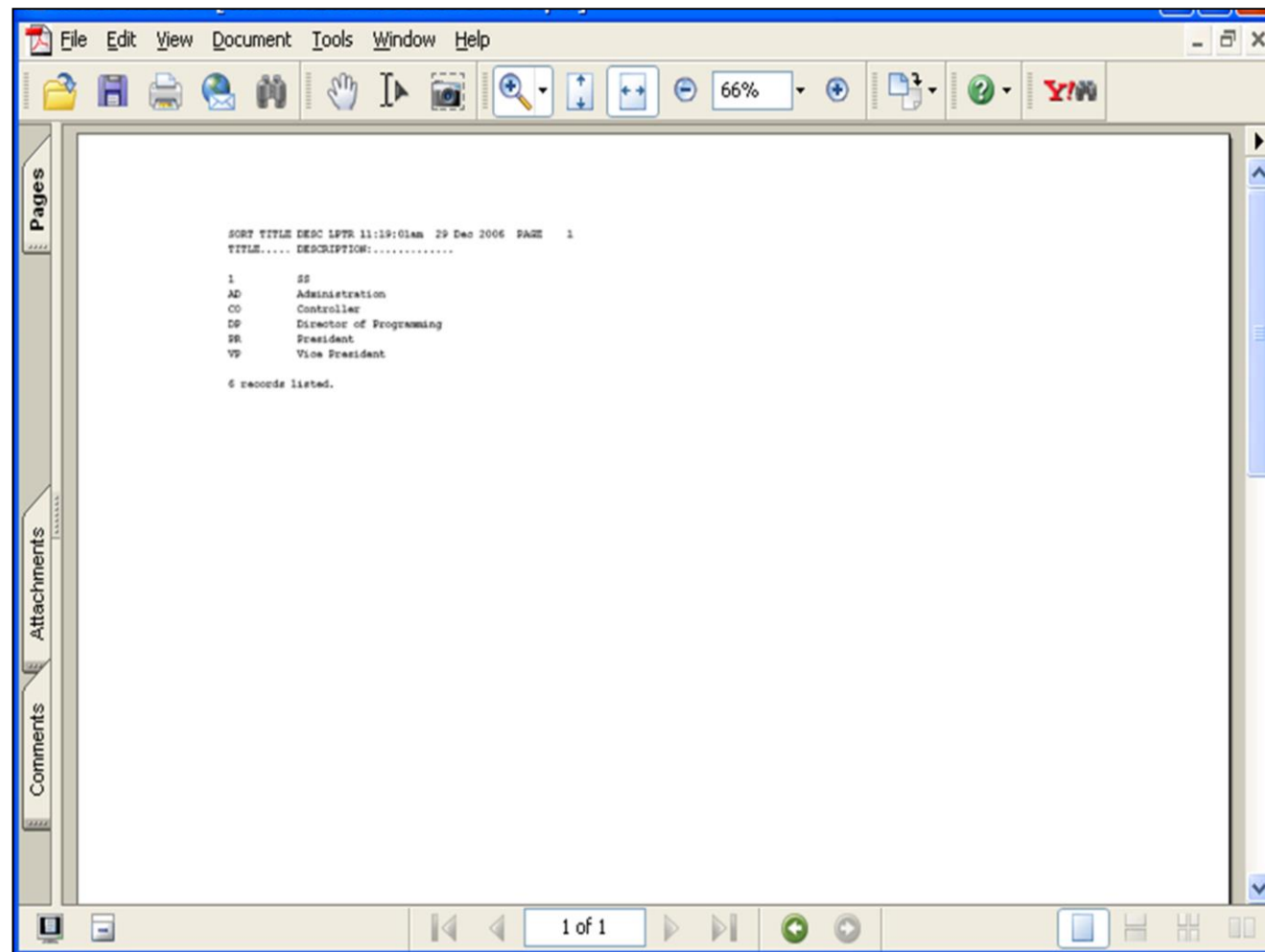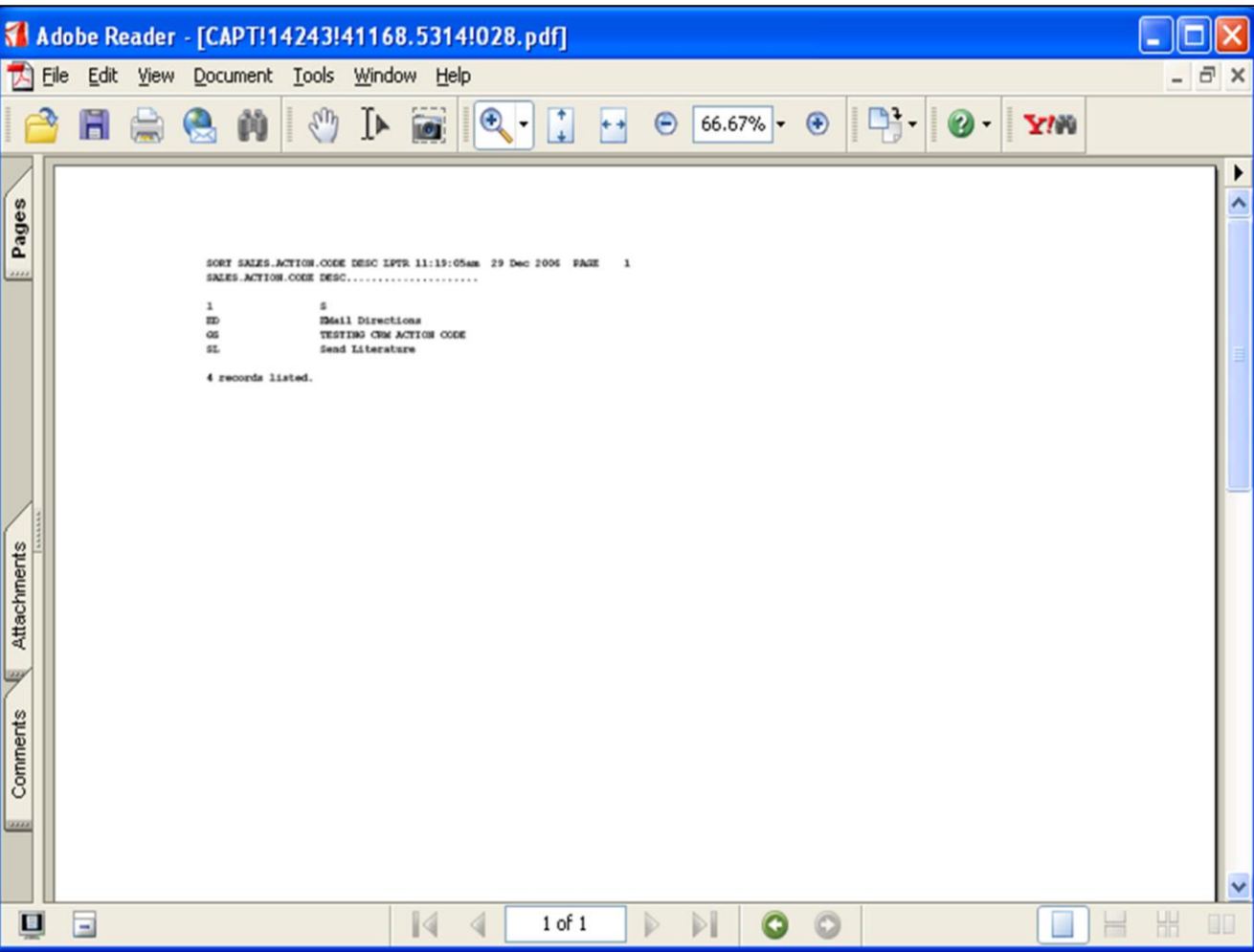
Notes:

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SORT SALES.ACTION.CODE DESC LPTR 11:19:05am  29 Dec 2006  PAGE    1
SALES.ACTION.CODE DESC.....................

1                  S
ED                 EMail Directions
GS                 TESTING CRM ACTION CODE
SL                 Send Literature

4 records listed.

                    1 of 1
```

Sales Action Code Listing

The sales action code listing provides a listing of existing sales action codes.

The user may press <RETURN>, click the "OK/END" icon or use the 'F2' function key to process the sales action code listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".

Notes:

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Where to get more Information

- Additional training Sessions

- Place a support call using the CRS system: http://crs.tshinc.com

- Call The Systems House, Inc. at 973-777-8050

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Sales Analysis Training Guide
Where to get more information

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

Note: This guide was made using WINMDS.

If you still have questions after reviewing this guide, you have several options:

1. Order additional training Sessions- TSH personnel can train you on the specifics of your system.

2. Place a support call using the CRS system: http://crs.tshinc.com – The most efficient way of entering and tracking Support calls. Plus, you will have a written record of the resolution for future reference. If you do not have a login, call TSH today to set on up.

3. Call The Systems House, Inc. at 973-777-8050 – were here to serve you in any way we can.

Notes:

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