



Customer Relationship Management (CRM) Guide

Training Guide
for CRM on MDS

From The Systems House, Inc.

Account:15 BASE.12 Port:015 Menu:MENU Capture:On

Master Distribution System

Release:12.90706

Main System Selector

- 1. Order Entry and Invoicing
- 2. Order Entry Reports
- 3. Accounting Registers
- 4. Accounts Receivable
- 5. Price Maintenance/Price Books
- 6. Costing/Inventory Evaluation
- 7. Purchasing
- 8. Inventory/Warehouse Procedures
- 9. Physical Inventory Procedures
- 10. Inventory Management
- 11. Sales Analysis
- 12. File Maintenance
- 13. Accounts Payable**
- 14. General Ledger

- 15. End of Day Processing
- 16. End of Month Processing
- 17. End of Year Processing
- 18. Inquiries
- 19. Utilities
- 20. Recall Generator
- 21. Special Programs
- 22. Electronic Mail
- 23. Purge and Fix Programs
- 24. EDI Menu
- 25. Service Menu
- 26. Raw Materials
- 27. Sales Management Menu

Enter Selection or END : 13

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

Account:15 BASE.12 Port:015 Menu:MENU Capture:On

Master Distribution System

Release:12.90706

Main System Selector

- 1. Order Entry and Invoicing
- 2. Order Entry Reports
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Enter Selection or END : 13

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

Account:15 BASE.12 Port:015 Menu:MENU Capture:On

Master Distribution System

Release:12.90706

Main System Selector

- 1. Order Entry and Invoicing
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- 20. Recall Generator
- 21. Special Programs
- 22. Electronic Mail
- 23. Purge and Fix Programs
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- 25. Service Menu
- 26. Raw Materials
- 27. Sales Management Menu

Enter Selection or END : 13

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



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



Account:37 BASE.12 Port:037 Menu:MAIN.MENU Capture:On

Main System Selector

- 1. Customer Service
- 2. Purchasing
- 3. Warehouse and Inventory Management
- 4. Sales Analysis
- 5. Sales Management Menu
- 6. Accounting Menu
- 7. File Maintenance
- 8. End of Period Processing
- 9. Utility Menu
- 10. Customer Special Programs
- 11. Optional Systems

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				



Account:37 BASE.12 Port:037 Menu:CRM.MENU Capture:On

Customer Relationship Management

1. Customer Relationship Inquiry (Summary)

2. Customer Relationship Inquiry (Detail)

3. Customer Relationship Report by Customer

4. Customer Relationship Report by Follow-Up Date

5. Customer Relationship Report by Service Rep

6. Customer Relationship Purge by Customer

7. Customer Relationship Purge by Contact Date

8. CRM Action Code Maintenance

9. Notes / Task Menu

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			

Customer Relationship Management Call (Summary)

Customer Service Rep SY1 SY FERTIG # in list 2
 Action C1 Call in 1 week

Ln#	Customer#	Customer Name	City	ST	Follow-up Date	Foll Time
1.	IDEAL	IDEAL DISTRIBUTION CO	CLIFTON	NJ		
2.	ALCO	ALCO SUPPLY COMPANY	WAYNE	NJ	11/15/06	14:00
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
13.						
14.						
15.						
16.						

Enter Line# for Detail Screen or END: XXXXXX

Customer Relationship Ma

Customer# XAJA

Credit Hold Credit Limit

Name

Address1

Address2

Address3

City

1.Business

6. Oper Date Time

Contact Email

Topic Inv# Ret

1.

Act

2.

Act

Customer	Notes	Date	Co
CUSTOMER AJAX NOTES		11/05/02	ALL
EXTRAC AJAX NOTES		11/05/02	ALL
test for comment		01/20/05	ALL

Press any key to Continue

: XX

Page 1 of 1

Customer	Relationship	Management	Call	(Detail)	# in list
Customer#	IDEAL	Internal#	100013	Position in list	
Credit Hold	N	Credit Limit	10,000	A/R Balance	80.05
Name	IDEAL DISTRIBUTION CO		Phone#	201-444-4545	Fax# 973-777-1483
Address1	10 CLIFTON BLVD.		E-Mail	support@tshinc.com	
Address2			2.SIC Code	TESTTM	GRACE'S GROUPING
Address3			3.Contact1	CONT1	
City	CLIFTON	NJ 07015	4.Contact2	CONT2	
1.Business	DISTRIBUTION - BUSINESS		5.Follow Up	11/15/06	15:00

6.	Oper	Date	Time	Notes/Text
Contact	Topic	Inv#	Ret	Email
1.	SY1	02/27/06	15:12	CREDIT CARD ON ACCOUNT FOR \$169.00CHECK NUMBER 200
				60227141359-05971-95426
	CASH MESSAGE	01128833	C	
Act				
2.	SY1	02/27/06	14:37	CREDIT CARD ON ACCOUNT FOR \$255.00CHECK NUMBER 200
				60227133829-05971-95422
	CASH MESSAGE	01128831	C	
Act				

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

Contacts	Prev Rec	Next Rec	AR Inq	Add Note	Mds Inq	Cust Ord	Cred Card	Topic			
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL				

Customer	Relationship	Management	Call	(Detail)	# in list
Customer#	IDEAL	Internal#	100013	Position in list	
Credit Hold	N	Credit Limit	10,000	A/R Balance	80.05
Name	IDEAL DISTRIBUTION CO		Phone#	201-444-4545	Fax# 973-777-1483
Address1	10 CLIFTON BLVD.		E-Mail	support@tshinc.com	
Address2			2.SIC Code	TESTTM	GRACE'S GROUPING
Address3			3.Contact1	CONT1	
City	CLIFTON	NJ 07015	4.Contact2	CONT2	
1.Business	DISTRIBUTION - BUSINESS		5.Follow Up	11/15/06	15:00

6.	Oper	Date	Time	Notes/Text
	Contact		Email	
	Topic	Inv#	Ret	
1.	SY1	02/27/06	15:12	CREDIT CARD ON ACCOUNT FOR \$169.00CHECK NUMBER 200
				60227141359-05971-95426
	CASH MESSAGE	01128833	C	
Act				
2.	SY1	02/27/06	14:37	CREDIT CARD ON ACCOUNT FOR \$255.00CHECK NUMBER 200
				60227133829-05971-95422
	CASH MESSAGE	01128831	C	
Act				

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

Contacts	Prev Rec	Next Rec	AR Inq	Add Note	Mds Inq	Cust Ord	Cred Card	Topic			
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL				

Customer	Relationship	Management	Call	(Detail)	# in list
Customer#	IDEAL	Internal#	100013	Position in list	
Credit Hold	N	Credit Limit	10,000	A/R Balance	80.05
Name	IDEAL DISTRIBUTION CO		Phone#	201-444-4545	Fax# 973-777-1483
Address1	10 CLIFTON BLVD.		E-Mail	support@tshinc.com	
Address2			2.SIC Code	TESTTM	GRACE'S GROUPING
Address3			3.Contact1	CONT1	
City	CLIFTON	NJ 07015	4.Contact2	CONT2	
1.Business	DISTRIBUTION - BUSINESS		5.Follow Up	11/15/06	15:00

6.	Oper	Date	Time	Notes/Text
Contact	Topic	Inv#	Ret	Email
1.	SY1	02/27/06	15:12	CREDIT CARD ON ACCOUNT FOR \$169.00CHECK NUMBER 200
				60227141359-05971-95426
	CASH MESSAGE	01128833	C	
Act				
2.	SY1	02/27/06	14:37	CREDIT CARD ON ACCOUNT FOR \$255.00CHECK NUMBER 200
				60227133829-05971-95422
	CASH MESSAGE	01128831	C	
Act				

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

Contacts	Prev Rec	Next Rec	AR Inq	Add Note	Mds Inq	Cust Ord	Cred Card	Topic			
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL				

Customer Relationship Management Call (Detail) # in list
Customer# IDEAL Internal# 100013 Position in list

Send Email Entry

Send Email?

1. Recipient

- 1. support@tshinc.com
- 2.
- 3.
- 4.
- 5.

2. From

SUPPORT@TSHINC.COM

3. Subject

4. Message

Text of email goes here. System can use your client email.

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

XXXXXX

Email All	Clear All																		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL												

SEND LIT



PLEASE SEND CRM ASAP!

N

Act C1 Call in 1 week

Enter Line Number to Change or '0' to Accept

XXXXXX

Contacts	Prev Rec	Next Rec	AR Inq	Add Note	Mds Inq	Cust Ord	Cred Card	Topic					
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL						



Inquiry List

Settings Help

Customer# 1
 Credit Hold
 Name
 Address
 Address
 Address
 City
 1.Business
 6. Open
 Contact
 Topic
 1. SY1
 Add
 OK
 Cancel

Email Addresses Sent for Customer: IDEAL For Note Line: 1	Date Sent	Time Sent
support@tshinc.com	11/03/08	09:29:20pm

83

1. SY1
 CON
 TOP

Act SL Send Literature

2.	GMS	09/26/08	13:50	
	SEND LIT			E PLEASE SEND CRM ASAP!
	AR Topic		N	

Act C1 Call in 1 week

Enter Line Number to Change or '0' to Accept

XXXXXX

Contacts	Prev Rec	Next Rec	AR Inq	Add Note	Mds Inq	Cust Ord	Cred Card	Topic			
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL				

Customer	Relationship	Management	Call	(Detail)	# in list
Customer#	XAJA	Internal#	100015	Position in list	
Credit Hold	N	Credit Limit	1	A/R Balance	2,988.18
Name	AJAX INDUSTRIAL SUPPLY		Phone#	201-252-1000	Fax# 201-777-3063
Address1	12 MAIN ST		E-Mail	ajax@test.com	
Address2			2.SIC Code	TESTTM	GRACE'S GROUPING
Address3			3.Contact1	CONT-1	
City	PLAINFIELD	NJ 02001	4.Contact2	CONT-2	
1.Business	INDUSTRIAL SUPPLIES		5.Follow Up	07/25/03	15:00

6.	Oper	Date	Time	Notes/Text
	Contact		Email	
	Topic	Inv#	Ret	
1.	XXXXXXXXXX			
Act				
2.	SY1	07/20/04	09:27	ARRANGEMENT MADE FOR PAYMENT IN 1 WEEK
	SUSAN M			
			N	
Act				

Customer	Relationship	Management	Call	(Detail)	# in list
Customer#	IDEAL	Internal#	100013	Position in list	
Credit Hold	N	Credit Limit	10,000	A/R Balance	80.05
Name	IDEAL DISTRIBUTION CO		Phone#	201-444-4545	Fax# 973-777-1483
Address1	10 CLIFTON BLVD.		E-Mail	support@tshinc.com	
Address2			2.SIC Code	TESTTM	GRACE'S GROUPING
Address3			3.Contact1	CONT1	
City	CLIFTON	NJ 07015	4.Contact2	CONT2	
1.Business	DISTRIBUTION - BUSINESS		5.Follow Up	11/15/06	15:00

6.	Oper	Date	Time	Notes/Text
	Contact		Email	
	Topic	Inv#	Ret	
1.	SY1	02/27/06	15:12	CREDIT CARD ON ACCOUNT FOR \$169.00CHECK NUMBER 200
				60227141359-05971-95426
	CASH MESSAGE	01128833	C	
Act				
2.	SY1	02/27/06	14:37	CREDIT CARD ON ACCOUNT FOR \$255.00CHECK NUMBER 200
				60227133829-05971-95422
	CASH MESSAGE	01128831	C	
Act				

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

Contacts	Prev Rec	Next Rec	AR Inq	Add Note	Mds Inq	Cust Ord	Cred Card	Topic			
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL				

Customer Contacts Inquiry

Customer#	IDEAL	IDEAL DISTRIBUTION CO
-----------	-------	-----------------------

A/R Contact	RICHARD GALVIN	Purch Contact	
A/R Phone	201-444-4545	Purch Phone	
A/R EMail	support@tshinc.com		

Contact Name	Description	Phone#	Ext
EMail Address			Fax# Cell Phone#

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

Customer Contacts Inquiry

Customer# IDEAL IDEAL DISTRIBUTION CO

A/R Contact RICHARD GALVIN Purch Contact []
A/R Phone 201-444-4545 Purch Phone []
A/R EMail support@tshinc.com

Contact Name	Description	Phone#	Ext
E-mail Address			Fax# Cell Phone#
[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]

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

Customer	Relationship	Management	Call	(Detail)	# in list
Customer#	IDEAL	Internal#	100013	Position in list	
Credit Hold	N	Credit Limit	10,000	A/R Balance	80.05
Name	IDEAL DISTRIBUTION CO		Phone#	201-444-4545	Fax# 973-777-1483
Address1	10 CLIFTON BLVD.		E-Mail	support@tshinc.com	
Address2			2.SIC Code	TESTTM	GRACE'S GROUPING
Address3			3.Contact1	CONT1	
City	CLIFTON	NJ	07015	4.Contact2	CONT2

1.Business DISTRIBUTION - BUSINESS

6.	Oper	Date	Time	Notes/Text
	Contact		Email	
	Topic	Inv#	Ret	
1.	SY1	10/14/08	11:10	THIS IS A TEST FOR
	CONT1			BLEM IS OR IF TH
			N	T HAPPENS.
Act	SL	Send Literature		
2.	GMS	09/26/08	13:50	
	SEND LIT			PLEASE SEND CF
			N	
Act	C1	Call in 1 week		

Message	Board	Credit	Card	Entry
1.Type	M/C			
2.Number	5555-5555-5555-4444			
3.Name	Lauren Weisbergger			
4.Exp Dt	1209			
5.Verify#	1234			
6.Address	10 CLIFTON BLVD.			
7.Zipcode	07015			
8.Corp Cd	N			
9.Amount		25.00		
10.Comp#	01	The Systems House, Inc		
Enter Line# to Change, 0 to Accept				0



DATE: 04 Nov 2008

CUSTOMER RELATIONSHIP REPORT

PAGE: 1

CUSTOMER#	CUSTOMER NAME	LINE ENTRY DATE	FOLLOW UP DATE	INIT CONTACT	MESSAGE	RET
IDEAL	IDEAL DISTRIBUTION CO PLEASE SEND CRM ASAP!	2	09/26/08	GMS SEND LIT		
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

DATE: 04 Nov 2008

FOLLOW UP REPORT

PAGE: 1

Service Rep:
FOLLOW UP DATE EQUAL TO: 11/13/09

CUSTOMER#	CUSTOMER NAME	CONTACT DATE	FOLLOW UP DATE	INIT CONTACT	LINE	-----COMMENTS-----	RET
ANN	ANN'S GARDEN N	11/03/09	11/13/09	GMS Ann	1	she wants a week to think it over	
ALCO	ALCO HOLDINGS INC N	11/05/09	11/13/00	SY Kim	1	get credit card for outstanding balance	
IDEAL	IDEAL CORP N	11/03/09	11/13/00	SY John	1	will send partial this week	
JR	JR CORP N	11/03/09	11/13/00	SY Seth	1	wants a call in 2 weeks	

CUSTOMER#	CUSTOMER NAME	CONTACT DATE	FOLLOW UP DATE	INIT	CONTACT	LINE	-----COMMENTS-----	RET
1020	COLUMBIA*PREBYTERIAN	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	kp1	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

Purge CRM file - Specific Customer

Capture:On

1. Customer#

IDEAL

IDEAL DISTRIBUTION CO

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

XXXXXX

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

Purge CRM file - By Cutoff Contact Date Capture:On

1. Enter Cutoff Contact Date

11/04/07

November 2007						
Sun	Mon	Tue	Wed	Thu	Fr	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Today: 11/14/2008

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

XXXXXX

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

CRM Action Code Maintenance

Action Code CL

1.Description Call Later- 1 week

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

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



Account:37 BASE.12 Port:037 Menu:NOTES.TASK.MENU Capture:On

Notes / Task Menu

Maintain

Listing

1. Quick Notes

4. Quick Notes

2. Task Lists (Summary)

3. Task Lists (Detail)

5. Task Lists (Detail)

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			

Quick Notes Maintenance

Note Key CB

1.Note Call Back Later

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

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

Task Lists Entry (Summary)

Operator SY FERTIG Allow Y # in list 4

Responsibility To

Customer/Prospect IDEAL To IDEAL

Cust/Prospect Name

Priority Code To

Due Date To

Description

Status Code To

State To

Customer Class To

Ln#	TaskID	Respons	Cust/Prospect	Name	Due.Date	Description	Stat
1.	0000082	GMS	IDEAL	IDEAL DISTRIBUTION CO	10/16/06	Arrange demo date	OPN
2.	0000084	SF	IDEAL	IDEAL DISTRIBUTION CO	10/16/06	new system	ABC
3.	0000238	lisa	IDEAL	IDEAL DISTRIBUTION CO	11/10/08	Budget Meeting	OPN
4.	0000233	GMS	IDEAL	IDEAL DISTRIBUTION CO	12/01/08	Put together powerp	OPN
5.							
6.							
7.							
8.							

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

Search	Add Tasks									
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL			

Task Lists Entry (Summary)

Operator Allow # in list

Responsibility To

Customer/Prospect To

Cust/Prospect Name

Priority Code To

Due Date To

Description

Status Code To

State To

Customer Class To

Ln#	TaskID	Respons	Cust/Prospect	Name	Due.Date	Description	Stat
1.	0000082	GMS	IDEAL	IDEAL DISTRIBUTION CO	10/16/06	Arrange demo date	OPN
2.	0000084	SF	IDEAL	IDEAL DISTRIBUTION CO	10/16/06	new system	ABC
3.	0000238	lisa	IDEAL	IDEAL DISTRIBUTION CO	11/10/08	Budget Meeting	OPN
4.	0000233	GMS	IDEAL	IDEAL DISTRIBUTION CO	12/01/08	Put together powerp	OPN
5.							
6.							
7.							
8.							

Enter Line# for Detail or S to Change Search Criteria

Search	Add Tasks									
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL			

Task Lists Entry (Summary)

Operator Allow Y # in list

Responsibility To

Customer/Prospect To

Cust/Prospect Name

Priority Code To

Due Date To

Description

Status Code To

State To

Customer Class To

Ln#	TaskID	Respons	Cust/Prospect	Name	Due.Date	Description	Stat
1.	0000082	GMS	IDEAL	IDEAL DISTRIBUTION CO	10/16/06	Arrange demo date	OPN
2.	0000084	SF	IDEAL	IDEAL DISTRIBUTION CO	10/16/06	new system	ABC
3.	0000238	Isa	IDEAL	IDEAL DISTRIBUTION CO	11/10/08	Budget Meeting	OPN
4.	0000233	GMS	IDEAL	IDEAL DISTRIBUTION CO	12/01/08	Put together powerp	OPN
5.							
6.							
7.							
8.							

Enter Line# for Detail or S to Change Search Criteria

Search	Add Tasks										
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL				

Task Lists Entry (Detail)

in list

Position in list

Task ID

1.Operator SY FERTIG

2.Responsibility

3.Customer/Prospect IDEAL DISTRIBUTION CO

4.Priority Code

5.Status Code ACTIVE PROSPECT

6.Description

7. Notes

8.Due Date / Start Date

9.Start Time

10.Recurring Task BiMonthly

11.Ending Date of Task

12.Day of Week / Month Day of the Month

13.Day of Month-2 Day of the Month-2

14.Complete (Y/N) Original Task ID Last Record of Original Task?

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

Prev Rec	Next Rec									
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL			

Task Lists Entry (Detail)

in list

Position in list

Task ID

1.Operator

2.Responsibility

3.Customer/Prospect

4.Priority Code

5.Status Code

6.Description

7. Notes

8.Due Date / Start Date

9.Start Time

10.Recurring Task

11.Ending Date of Task

12.Day of Week / Month

13.Day of Month-2

14.Complete (Y/N)

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

Prev Rec	Next Rec									
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL			

Task Lists Entry (Detail)

in list

Position in list

Task ID

1.Operator

2.Responsibility

3.Customer/Prospect

4.Priority Code

5.Status Code

6.Description

7. Notes

1.	First get committee together
2.	Discuss fall budget
3.	
4.	
5.	

8.Due Date / Start Date

9.Start Time

10.Recurring Task

11.Ending Date of Task

12.Day of Week / Month

13.Day of Month-2

14.Complete (Y/N)

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

I 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.

TASK.ID	ORIG	OPR	RESPNS...	A.CUST.NO	PRI	DUE.DATE	DESCRIPTION.....	STAT.CODE	STAT.DATE	REOC	END.DATE	DAY.WK.MD/ DAY.MON2
TASK ID						START.DT				TASK		
0000080		SY1	OMS	GRACE		10/16/06	PRODUCT GUIDE	ABC	10/16/06	N		
0000081		SY1	OMS	GRACE	1	12/17/07	TEST	55	12/17/07	N		
0000082		SY1	OMS	IDEAL		10/16/06	Arrange demo date	OPN	11/04/08	N		
0000083		SY1	OMS	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	OMS	GRACE		10/16/06			10/16/06	N		
0000087	0000081	SY1	OMS	GRACE		10/16/06	TEST		10/16/06	N		
0000088	0000081	SY1	OMS	GRACE		10/17/06	TEST		10/16/06	N		
0000089	0000081	SY1	OMS	GRACE		10/18/06	TEST		10/16/06	N		
0000090	0000081	SY1	OMS	GRACE		10/19/06	TEST		10/16/06	N		
0000091	0000081	SY1	OMS	GRACE		10/20/06	TEST		10/16/06	N		
0000092	0000082	SY1	OMS	GRACE		10/16/06	TESTING		10/16/06	N		
0000093	0000082	SY1	OMS	GRACE		10/23/06	TESTING		10/16/06	N		
0000094	0000082	SY1	OMS	GRACE		10/30/06	TESTING		10/16/06	N		
0000095	0000082	SY1	OMS	GRACE		11/06/06	TESTING		10/16/06	N		
0000096	0000082	SY1	OMS	GRACE		11/13/06	TESTING		10/16/06	N		
0000097	0000083	SY1	OMS	GRACE		10/16/06	TET		10/16/06	N		
0000098	0000083	SY1	OMS	GRACE		11/16/06	TET		10/16/06	N		
0000099	0000083	SY1	OMS	GRACE		12/16/06	TET		10/16/06	N		
0000100	0000084	SY1	OMS	GRACE		10/16/06	TEST 1		10/16/06	N		
0000101	0000084	SY1	OMS	GRACE		10/20/06	TEST 1		10/16/06	N		
0000102	0000084	SY1	OMS	GRACE		11/16/06	TEST 1		10/16/06	N		
0000103	0000084	SY1	OMS	GRACE		11/20/06	TEST 1		10/16/06	N		
0000104	0000084	SY1	OMS	GRACE		12/16/06	TEST 1		10/16/06	N		
0000105	0000085	SY1	OMS	GRACE		10/16/06			10/16/06	N		
0000106	0000085	SY1	OMS	GRACE		10/16/07			10/16/06	N		
0000107	0000085	SY1	OMS	GRACE		10/16/08			10/16/06	N		
0000122	0000081	SY1	OMS	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	OMS	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.



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