

# Customer Relationship Management (CRM) Guide

Training Guide for CRM on MDS From The Systems House, Inc.



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

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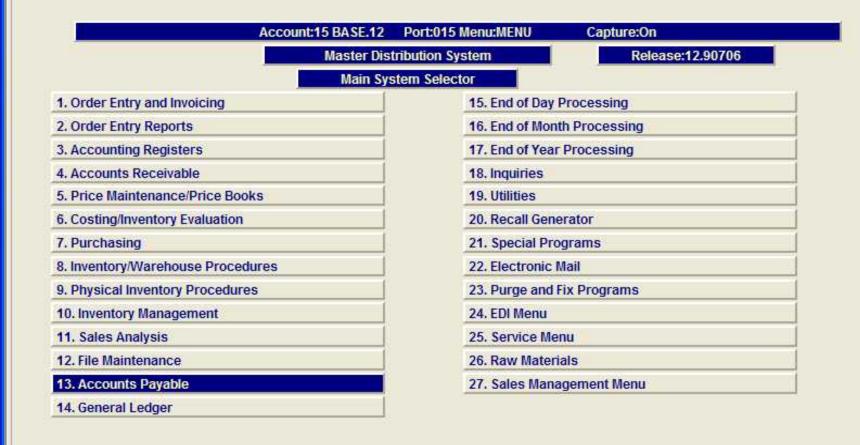


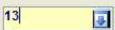
	CONTACTS	MAINT	DRILL	EXECINQ	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU	
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL			



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





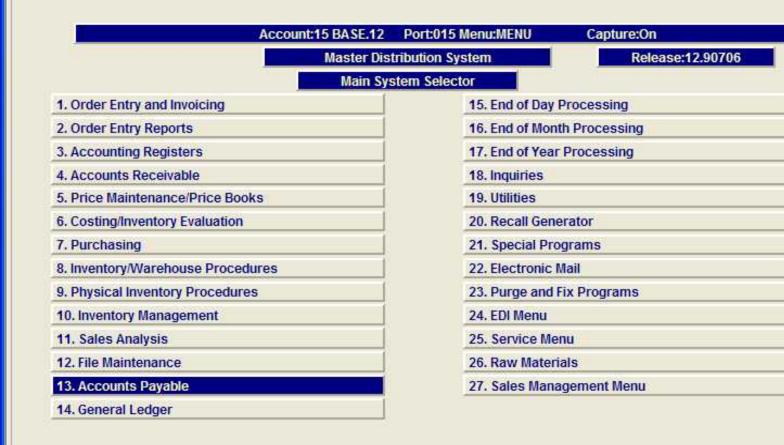


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HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL			



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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

## MDS for Windows Version 8.3.30 - [199.5.163.1-37 BASE.12-MAIN.MENU]



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

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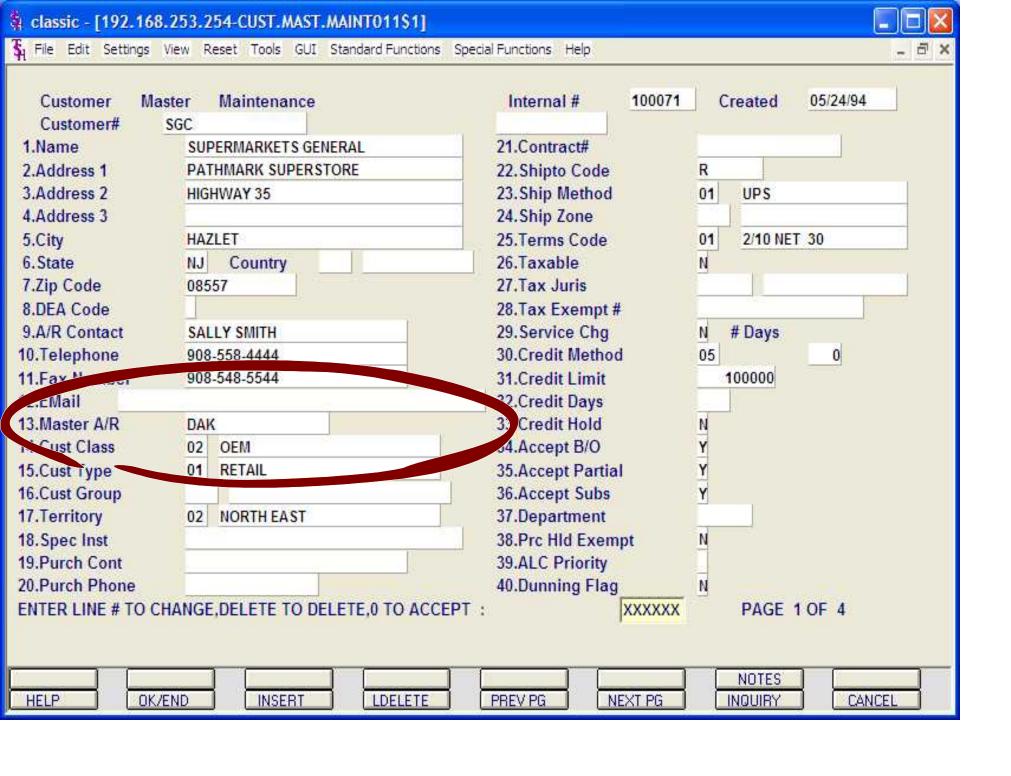
## Account:37 BASE.12 Port:037 Menu:MAIN.MENU Capture:On

## Main System Selector

## 1. Customer Service

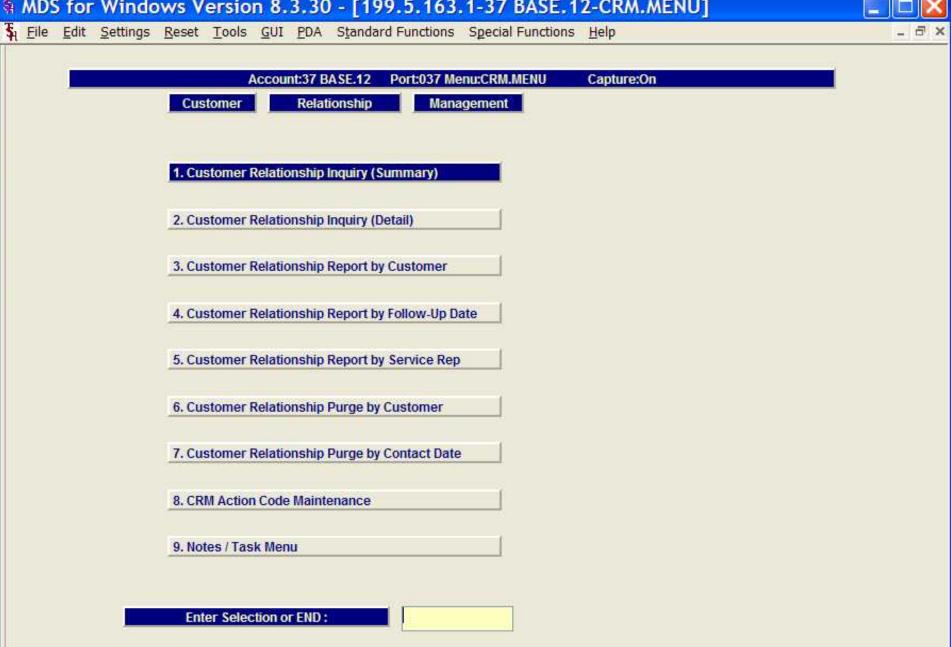
- 2. Purchasing
- 3. Warehouse and Inventory Management
- 4. Sales Analysis
- 5. Sales Management Menu
- 6. Accounting Menu
- 7. File Maintenance
- 8. End of Period Processing
- 9. Utility Menu
- 10. Customer Special Programs
- 11. Optional Systems

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

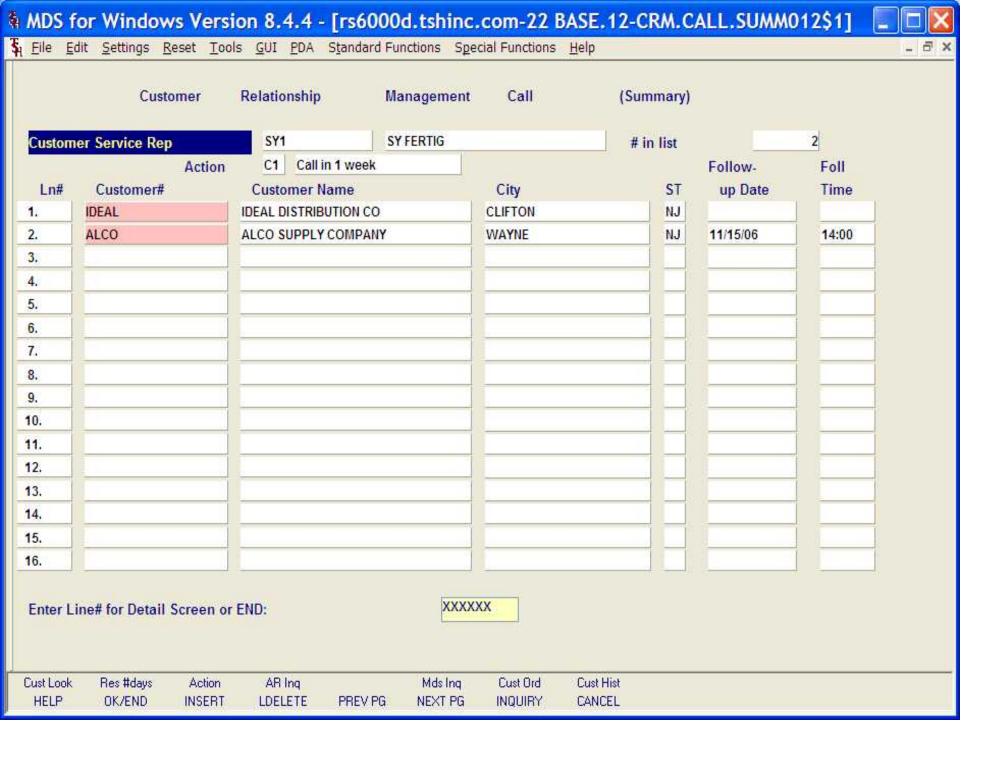


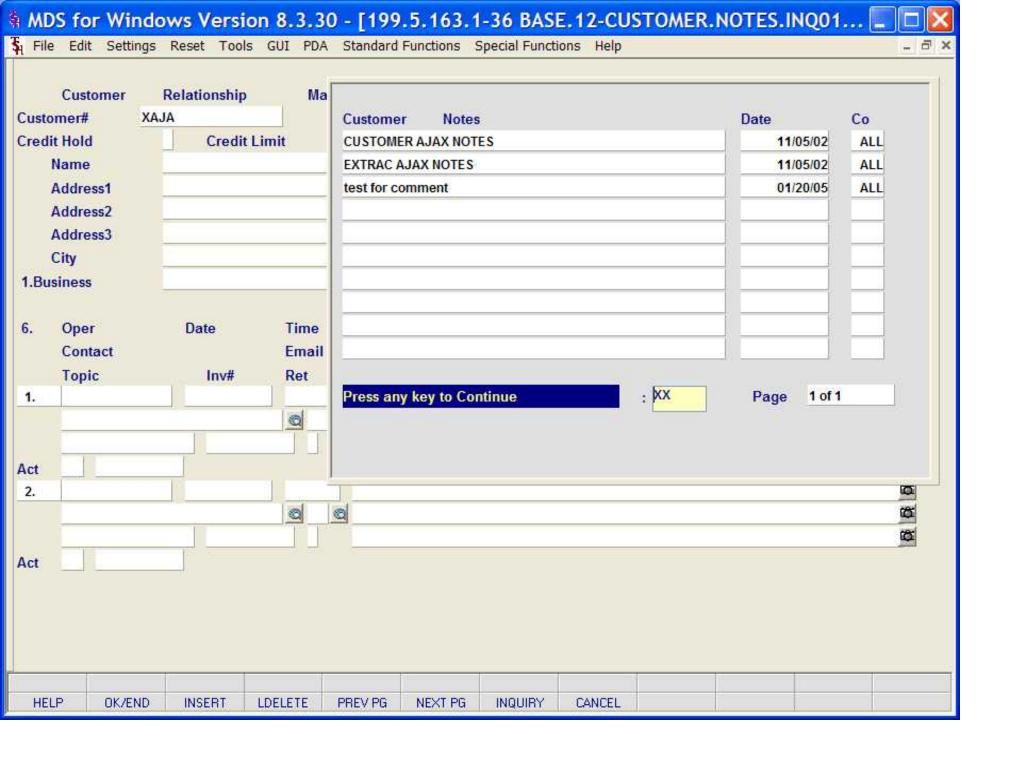
## MDS for Windows Version 8.3.30 - [199.5.163.1-37 BASE.12-CRM.MENU]

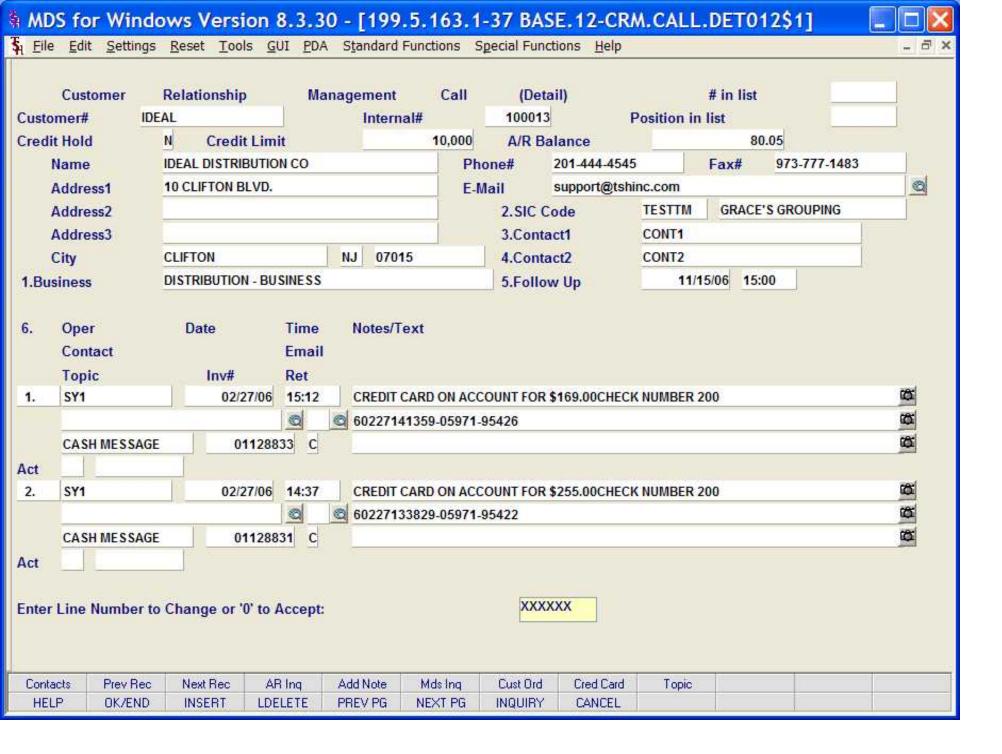


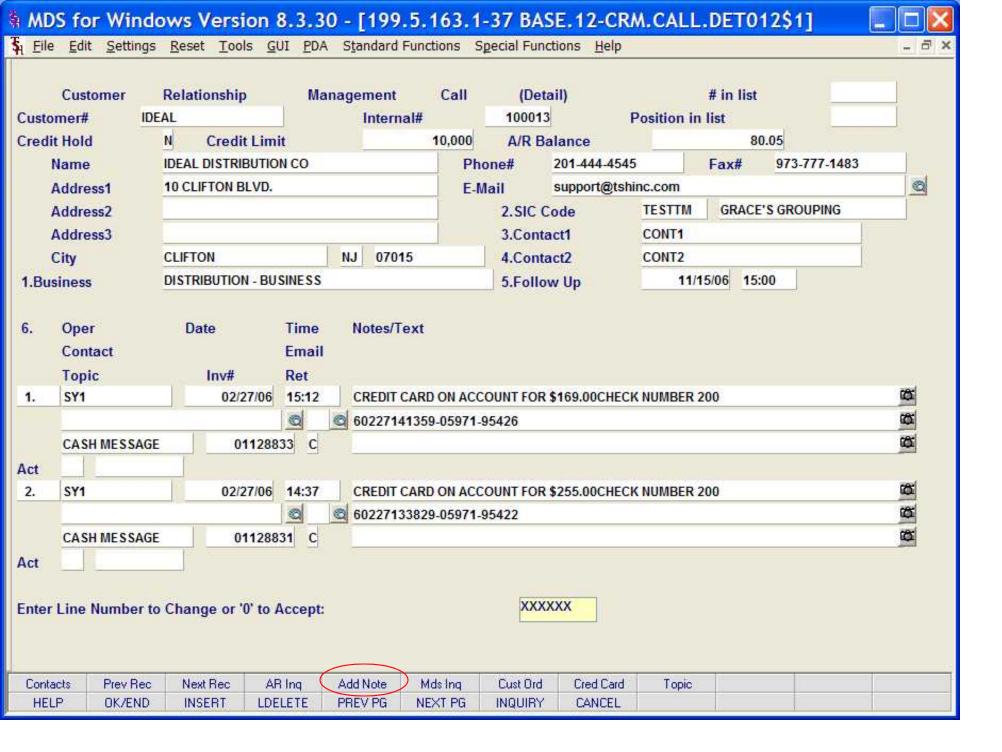


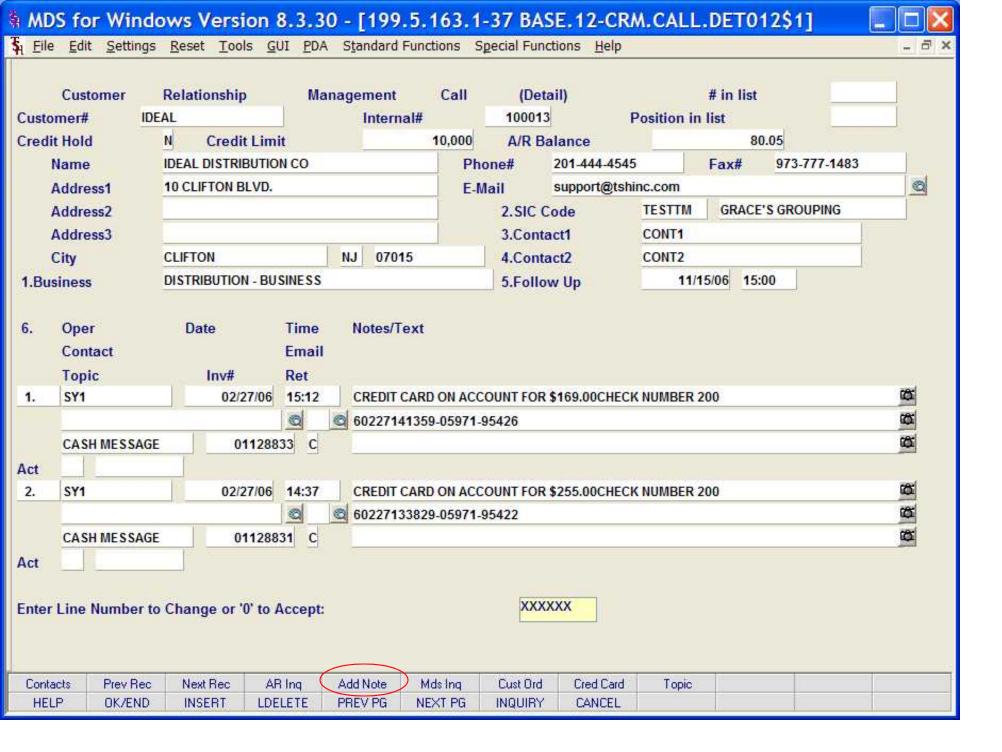
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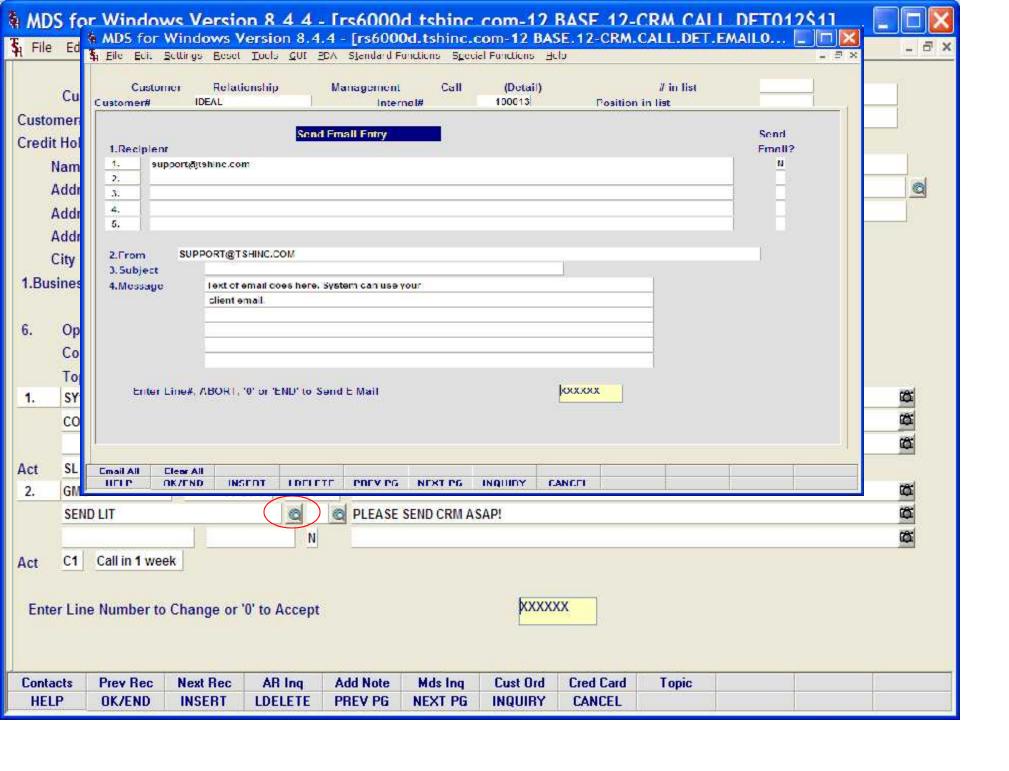


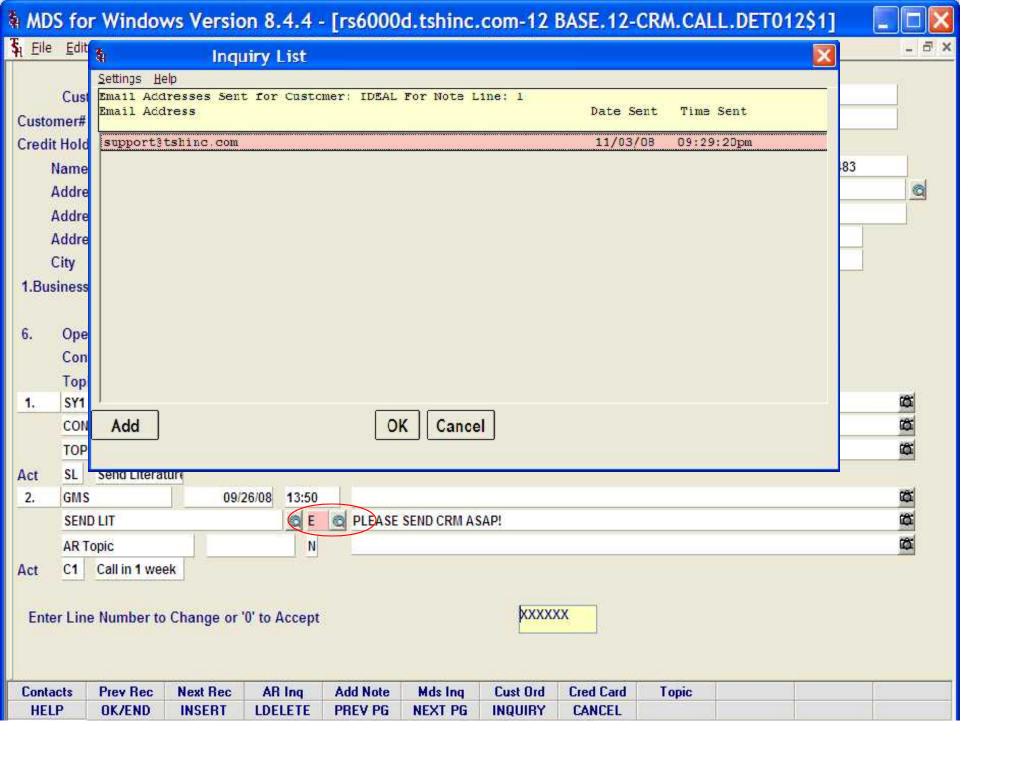


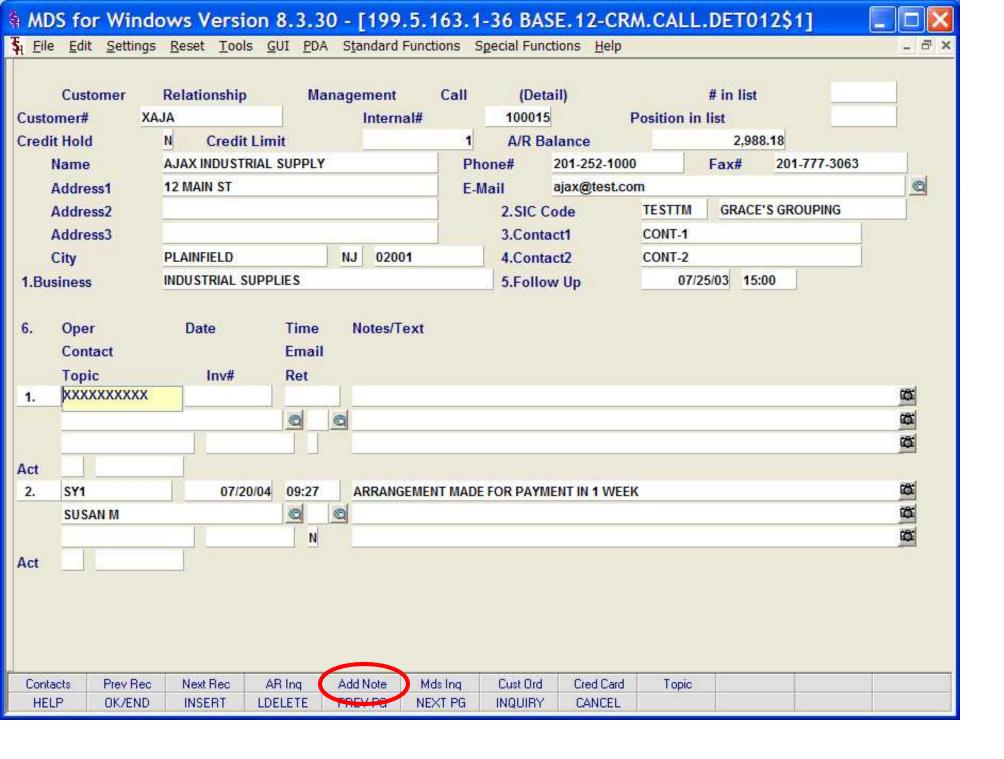


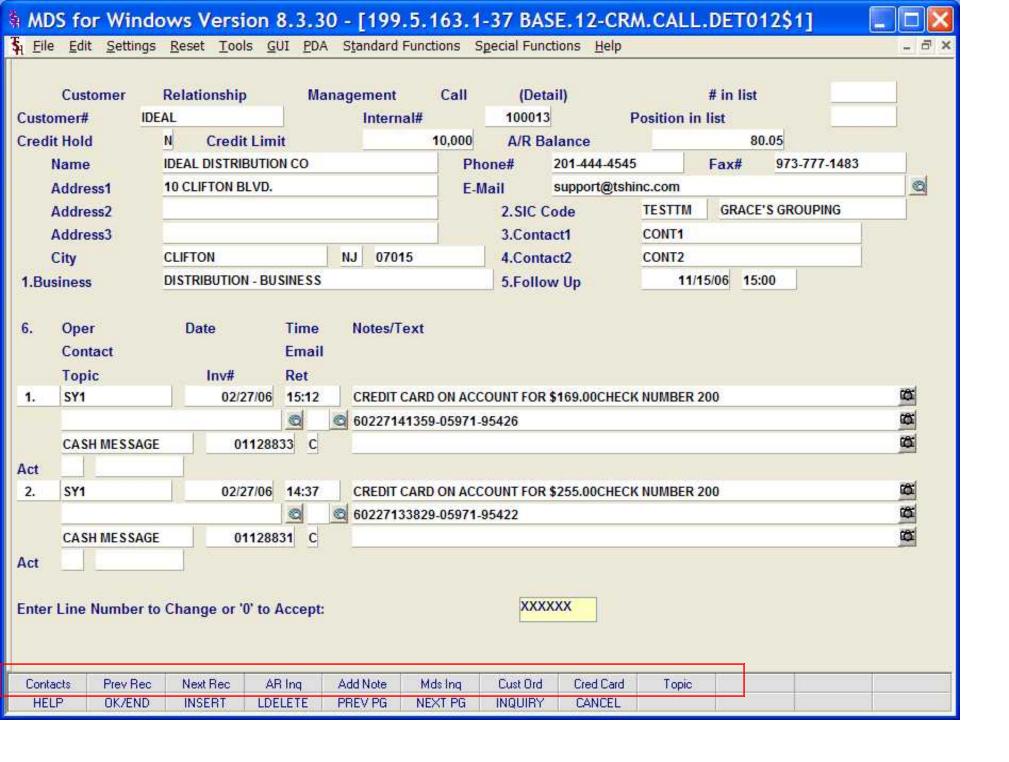


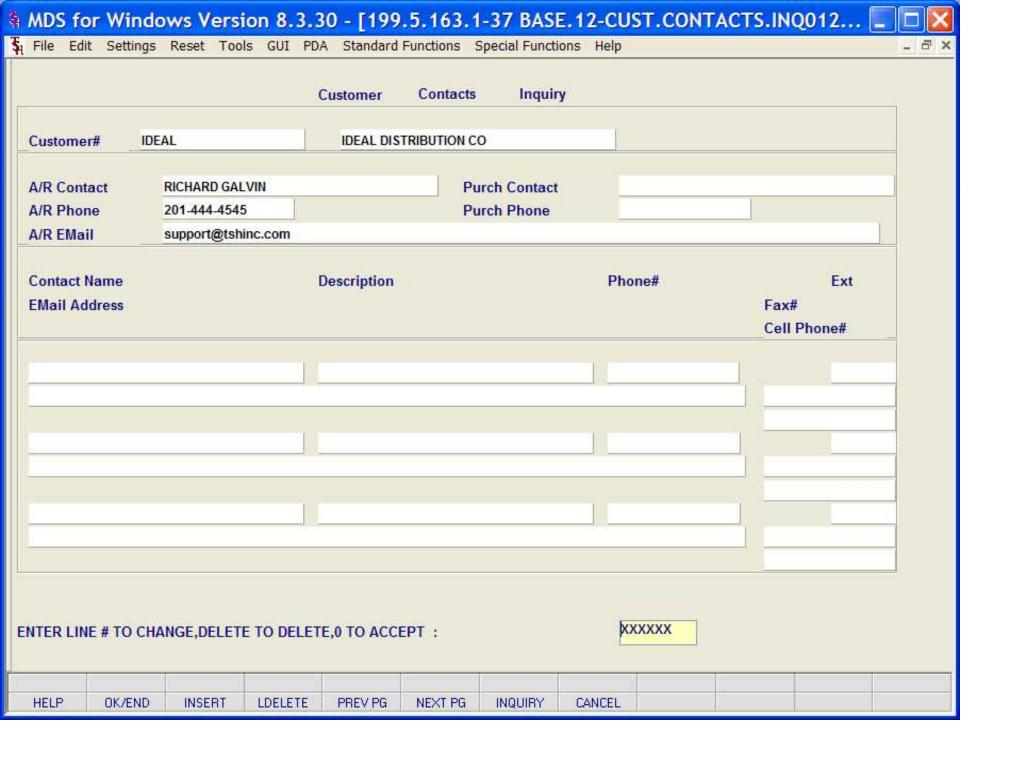


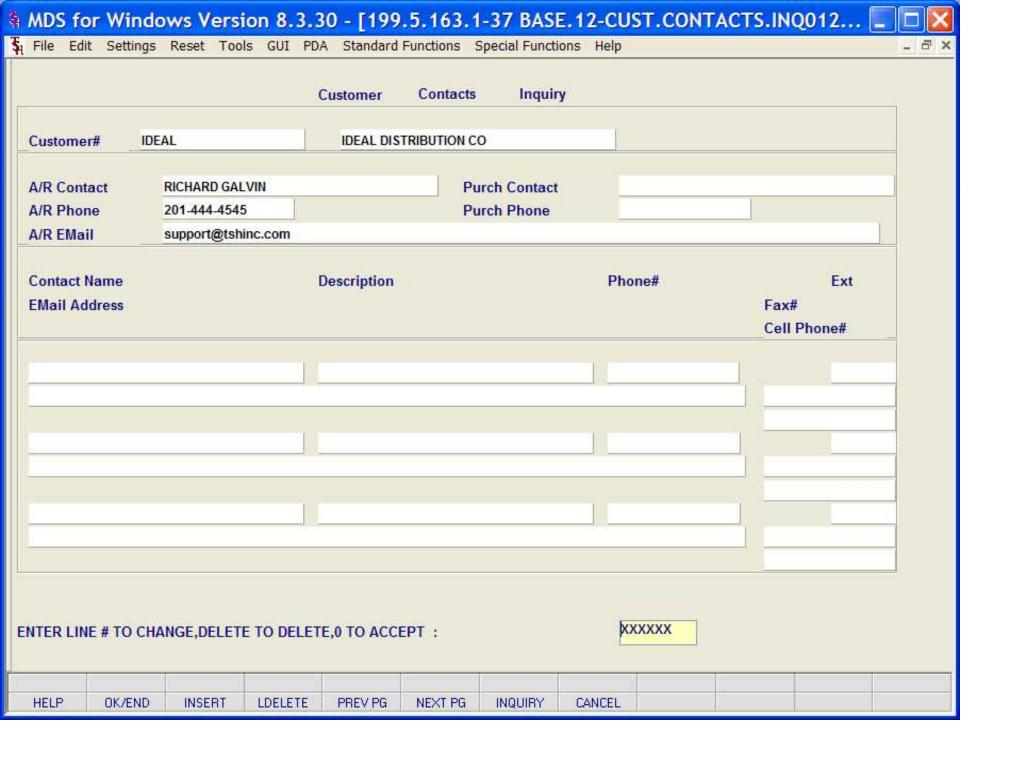


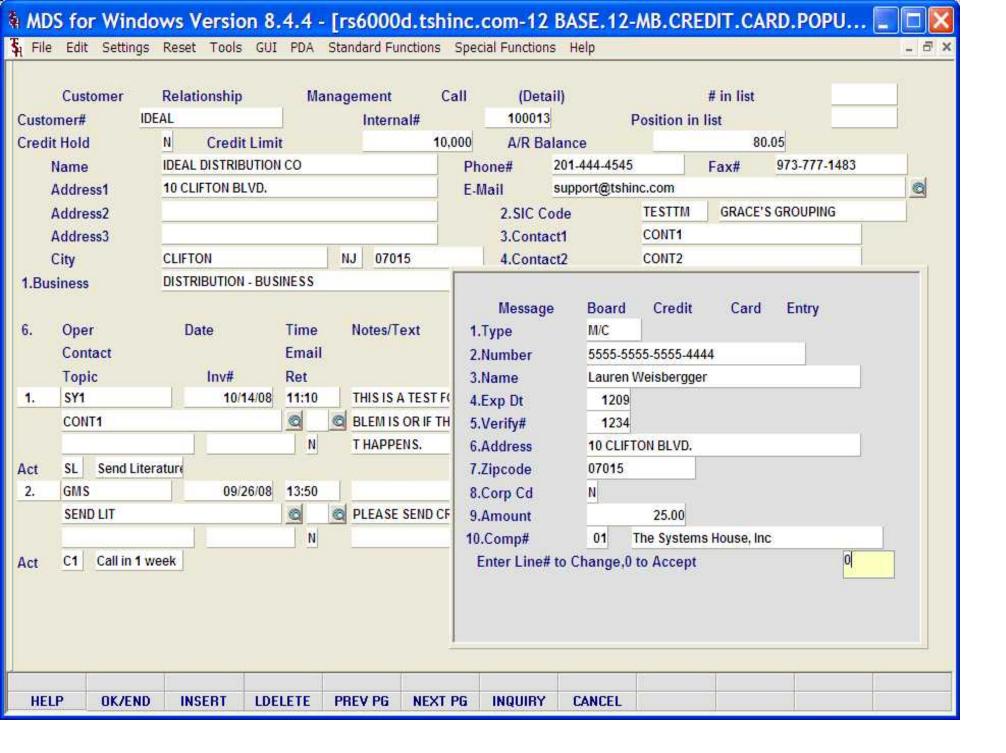














IDEAL

IDEAL DISTRIBUTION CO

13 07/01/03

DATE: 04 1	lov 2008		CUSTOMER RELATIONSHIP REPORT		PAGE: 1	
CUSTOMER#	CUSTOMER HAME	LINE ENTRY DATE	FOLLOW INIT CONTACT UP DATE	MESSAG	E	RET
	IDEAL DISTRIBUTION CO	2 09/26/08	GMS SEND LIT			
	n				************	
IDEAL	IDEAL DISTRIBUTION CO	23 03/14/03	SF	CREDIT CARD ON ACCOUNT FO	R \$100.004A25960807	¢
IDEAL	IDEAL DISTRIBUTION CO	22 03/25/03	SF	CREDIT CARD ON ACCOUNT FO	R \$200,003A26851311	¢
IDEAL	IDEAL DISTRIBUTION CO	4 02/27/06	SF	CREDIT CARD ON ACCOUNT FO	R \$255.00CHECK NUMBE	c
IDEAL	IDEAL DISTRIBUTION CO	8 02/27/06	SP	CREDIT CARD ON ACCOUNT FO	R \$0.00CHECK NUMBER	c
IDEAL	IDEAL DISTRIBUTION CO	9 02/23/06	SF	CREDIT CARD ON ACCOUNT FO	R \$250.00CHECK NUMBE	c
IDEAL	IDEAL DISTRIBUTION CO	5 02/27/06	SF	CREDIT CARD ON ACCOUNT FO	R \$100.00CHECK NUMBE	ď
IDEAL	IDEAL DISTRIBUTION CO	10 02/22/06	SF	CREDIT CARD ON ACCOUNT FO	R \$100.00CHECK WUMBE	c
IDEAL	IDEAL DISTRIBUTION CO	11 10/30/03	SF	CREDIT CARD ON ACCOUNT FO	R \$200.00CHECK WUMBE	c
IDEAL	IDEAL DISTRIBUTION CO	3 02/27/06	SF	CREDIT CARD ON ACCOUNT PO	R \$169.00CHECK WUMBE	c
IDEAL	IDEAL DISTRIBUTION CO	14 07/01/03	SF CONT1	CREDIT CARD ON ACCOUNT FO	R \$500.003A31315356	c
IDEAL	IDEAL DISTRIBUTION CO	6 02/27/06	SF	CREDIT CARD ON ACCOUNT FO	R \$10000.00CHBCK NUM	С

SF

CREDIT CARD ON ACCOUNT FOR \$700.004A30254241 C

PAGE: 1 DATE: 04 Nov 2008 FOLLOW UP REPORT Service Rep: FOLLOW UP DATE EQUAL TO: 11/13/09 CCNTACT FOLLOW CUSTOMER# CUSTOMER NAME UP DATE INIT CONTACT LINE -----COMMENTS-----DATE 1 she wants a week to think it over ANN'S GARDEN 11/03/09 11/13/09 GMS Ann ANN 11/05/09 11/13/00 5Y Kim 1 get credit card for outstanding balance ALCO ALCO HOLDINGS INC 1 will send partial this week 11/03/09 11/13/00 5Y John IDEAL IDEAL CORF

11/03/09 11/13/00 5Y Seth

JR

JR CORP

1 wants a call in 2 weeks

DATE: 04 Nov 2008

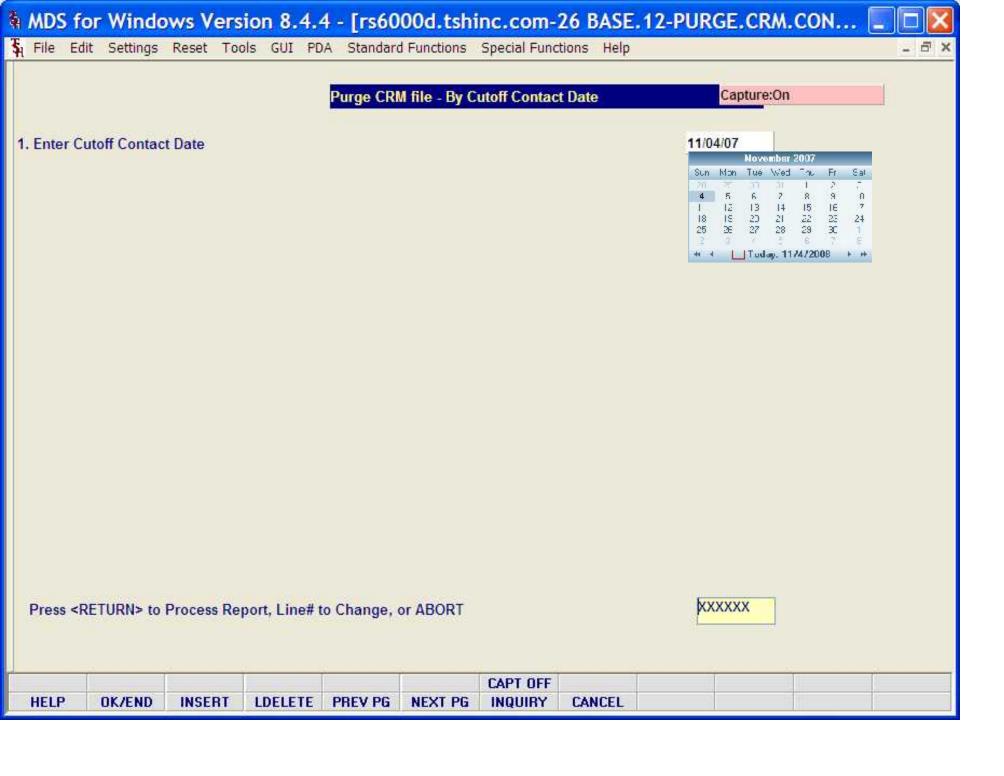
CRM FOLLOW UP REPORT by Service Rep Service Rep: ALL FOLLOW UP DATES: ALL

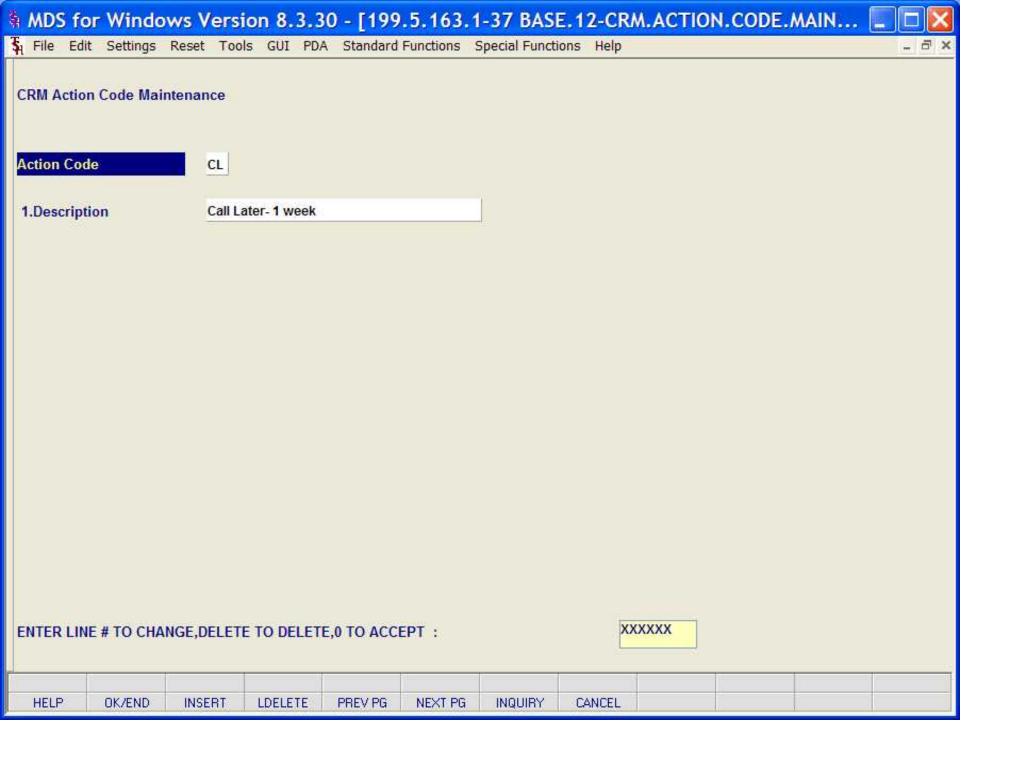
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	CONTACT	FOL OW					
CLSTOMER NAME	DATE	UP DATE	INIT	CONTACT	LINE	COMMENTS	RET
CCLUMBIA*PRESBYTERIAN	11/03/08	11/02/08	SF	ТОМ	1	SENDING SALES POWERPOINT	N
ANN'S GARDEN	11/03/08	11/03/08	GMS		1	she wants a week to think it over	N
AFB DISTRIBUTING, INC	07/10/08	04/01/08	SF		1	CREDIT CARD ON ACCOUNT FOR \$556.67	N
CONNIE'S SUPPLY	09/15/08		SF	JANE	1	NEW CUSTOMER	N
IDEAL DISTRIBUTION CO	03/27/08		5F		1	CREDIT CARD ON ACCOUNT FOR \$100.00 CHECK NUMBER V54A26967547	C
IDEAL DISTRIBUTION CO	03/27/08		SF		2	CREDIT CARD ON ACCOUNT FOR \$133.00 CHECK NUMBER V54A26967400	C
IDEAL DISTRIBUTION CO	03/27/08		SF		3	CREDIT CARD ON ACCOUNT FOR \$333.00 CHECK NUMBER V53A26967241	C
IDEAL DISTRIBUTION CO	03/27/08		RJ	JANE	4	TEST	C
IDEAL DISTRIBUTION CO	03/27/08		SF	LAURA	5	CREDIT CARD ON ACCOUNT FOR \$277.00 CHECK NUMBER V53A26966988	C
IDEAL DISTRIBUTION CO	03/27/08		RJ	JOE	5	OVERDUE CHARGING CARD	Y
JULIANNE TEST	11/03/08	11/03/08	SLS	LI5A	1	tried to call, call again in 1 week	N
David's Holding Inc.	12/28/08	12/28/08	KPL	JUNO	1	initial call	N
David's Holding Inc.	01/20/09	01/13/09	kp1	MARY	2	called for credit card payment	N
MABIS HEALTH	09/26/08		SF		1	discussed topic	N
MABIS HEALTH	09/26/08		TEY	THIS ONE	2	follow up call in 1 month	N
MABIS HEALTH	09/25/08		MAB	AR CONTACT3	3	FINAL ADDITION	N
MABIS HEALTH	09/19/08		SF	AR CONTACT 2	4	ADDED credit card info to file	N
	COLUMBIA® PRESBYTERIAN  ANN'S GARDEN  AFB DISTRIBUTING, INC  CONNIE'S SUPPLY  IDEAL DISTRIBUTION CO  JULIANNE TEST  David's Holding Inc.  MABIS HEALTH  MABIS HEALTH  MABIS HEALTH	CCLUMBIA*PRESBYTERIAN 11/03/08 ANN'S GARDEN 11/03/08 APB DISTRIBUTING, INC 07/10/08 CCNNIE'S SUPPLY 09/15/08 IDEAL DISTRIBUTION CO 03/27/08	CUSTOMER NAME  COLUMBIA*PRESBYTERIAN  ANN'S GARDEN  APB DISTRIBUTING, INC  CONNIE'S SUPPLY  IDEAL DISTRIBUTION CO  IDEAL DISTRIBUTION CO	CUSTOMER NAME  COLUMBIA*PRESBYTERIAN  ANN'S GARDEN  AFB DISTRIBUTING, INC  CONNIE'S SLPPLY  IDEAL DISTRIBUTION CO  IDEAL DISTRIBUTION CO	CUSTOMER NAME  DATE  UP DATE  INIT CONTACT  COLUMBIA*PRESBYTERIAN  11/03/08 11/02/08 SF  TOM  ANN'S GARDEN  11/03/08 11/03/08 GMS  AFB DISTRIBUTING, INC  07/10/08 04/01/08 SF  CONNIE'S SLPPLY  09/15/08  SF  IDEAL DISTRIBUTION CO  03/27/08  SF  LAURA  IDEAL DISTRIBUTION CO  03/27/08  SF  LAURA  IDEAL DISTRIBUTION CO  03/27/08  RJ  JOE  JULIANNE TEST  11/03/08 11/03/08 SLS LISA  David'S Holding Inc.  12/28/08 12/28/08 KPL  JUNO  David'S Holding Inc.  01/20/09 01/13/09 kpl MARY  MABIS HEALTH  09/26/08  TEY THIS ONE  MABIS HEALTH  09/26/08  MAB AR CONTACT3	CLISTOMER NAME  DATE  UP DATE  INIT CONTACT  LINE  CCLUMBIA°PRESBYTERIAN  11/03/08 11/02/08 SF TOM  1  ANN'S GARDEN  11/03/08 11/03/08 GMS  1  APB DISTRIBUTING, INC  07/10/08 04/01/08 SF  1  CCNNIE'S SLPPLY  09/15/08  SF JANE  1  IDEAL DISTRIBUTION CO  03/27/08  SF  1  IDEAL DISTRIBUTION CO  03/27/08  SF  2  IDEAL DISTRIBUTION CO  03/27/08  SF  3  IDEAL DISTRIBUTION CO  03/27/08  SF  3  IDEAL DISTRIBUTION CO  03/27/08  SF  1  ANNE  4  IDEAL DISTRIBUTION CO  03/27/08  SF  1  ANNE  4  IDEAL DISTRIBUTION CO  03/27/08  SF  LAURA  5  IDEAL DISTRIBUTION CO  03/27/08  RJ  JANE  4  IDEAL DISTRIBUTION CO  03/27/08  RJ  JOE  5  LISA  1  DAVId'S Holding Inc.  12/28/08 12/28/08 KPL  JUNO  1  DAVId'S Holding Inc.  01/20/09 01/13/09 Kpl  MARY  2  MABIS HEALTH  09/26/08  TEY THIS ONE  2  MABIS HEALTH  09/25/08  MAB AR CCNTACT3  3	CCLUMBIA PRESBYTERIAN 11/03/08 11/03/08 SF TOM 1 SENDING SALES POWERPOINT  ANN'S GARDEN 11/03/08 11/03/08 SMS 1 SHE WANTS A WEEK TO THINK IT OVER  AFB DISTRIBUTING, INC 07/10/08 04/01/08 SF 1 CREDIT CARD ON ACCOUNT FOR \$536.67  CCONNIE'S SLPPLY 09/15/08 SF JANE 1 NEW CUSTOMER  IDEAL DISTRIBUTION CO 03/27/08 SF 2 CREDIT CARD ON ACCOUNT FOR \$100.00 CHECK NUMBER V54A26967547  IDEAL DISTRIBUTION CO 03/27/08 SF 2 CREDIT CARD ON ACCOUNT FOR \$133.00 CHECK NUMBER V54A26967540  IDEAL DISTRIBUTION CO 03/27/08 SF 2 CREDIT CARD ON ACCOUNT FOR \$333.00 CHECK NUMBER V53A26967241  IDEAL DISTRIBUTION CO 03/27/08 RJ JANE 4 TEST  IDEAL DISTRIBUTION CO 03/27/08 RJ JANE 4 TEST  IDEAL DISTRIBUTION CO 03/27/08 RJ JOE 5 OVERDUE CHARGING CARD  ILLIANNE TEST 11/03/08 11/03/08 SLS LISA 1 tried to call, call again in 1 week  David's Holding Inc. 12/28/08 12/28/08 KPL JUNO 1 initial call  David's Holding Inc. 01/20/09 01/13/09 kpl MARY 2 called for credit card payment  MABIS HEALTH 09/26/08 FF THIS ONE 2 follow up call in 1 morth  MABIS HEALTH 09/26/08 NAB AR CONTACT3 3 FINAL ADDITION







## MDS for Windows Version 8.3.30 - [199.5.163.1-37 BASE.12-NOTES.TASK.MENU] File Edit Settings Reset Tools GUI PDA Standard Functions Special Functions Help 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: **EXECINQ** CONTACTS DRILL CAPT OFF VIEW CRM.MENU VRM.MENU MAINT REPORTS OK/END INSERT LDELETE PREV PG NEXT PG INQUIRY CANCEL HELP

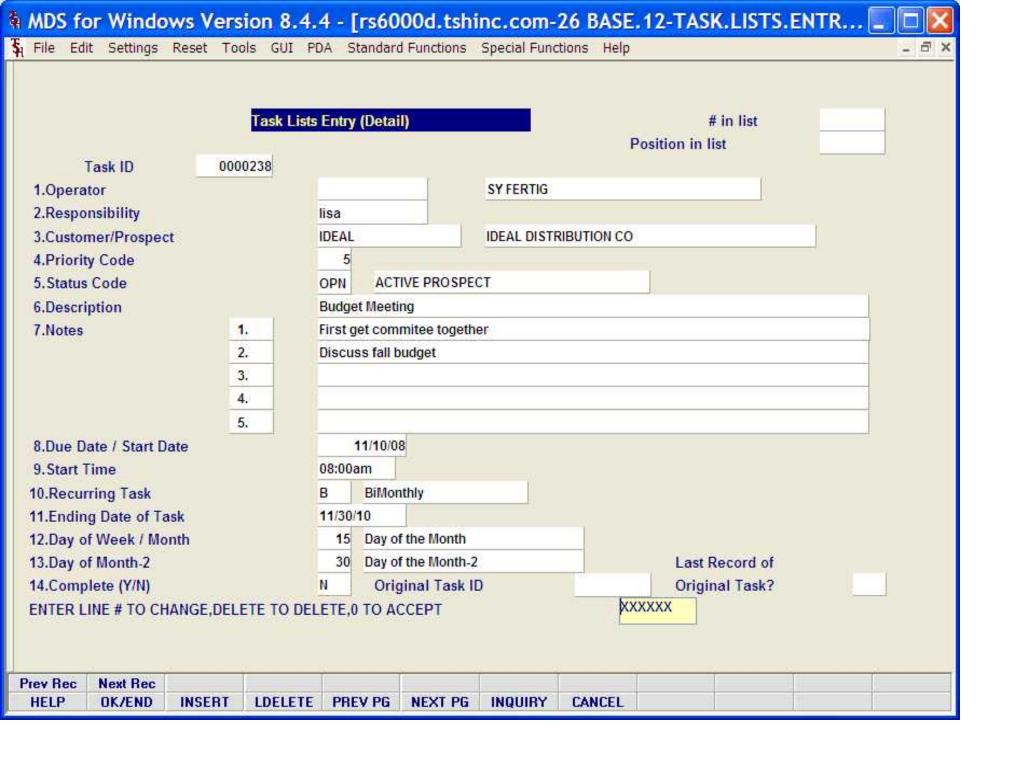
## MDS for Windows Version 8.3.30 - [199.5.163.1-37 BASE.12-QUICK.NOTES.MAINT012... File Edit Settings Reset Tools GUI PDA Standard Functions Special Functions Help **Quick Notes Maintenance** CB **Note Key** 1.Note Call Back Later XXXXXX ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT: HELP OK/END INSERT LDELETE PREV PG NEXT PG CANCEL INQUIRY

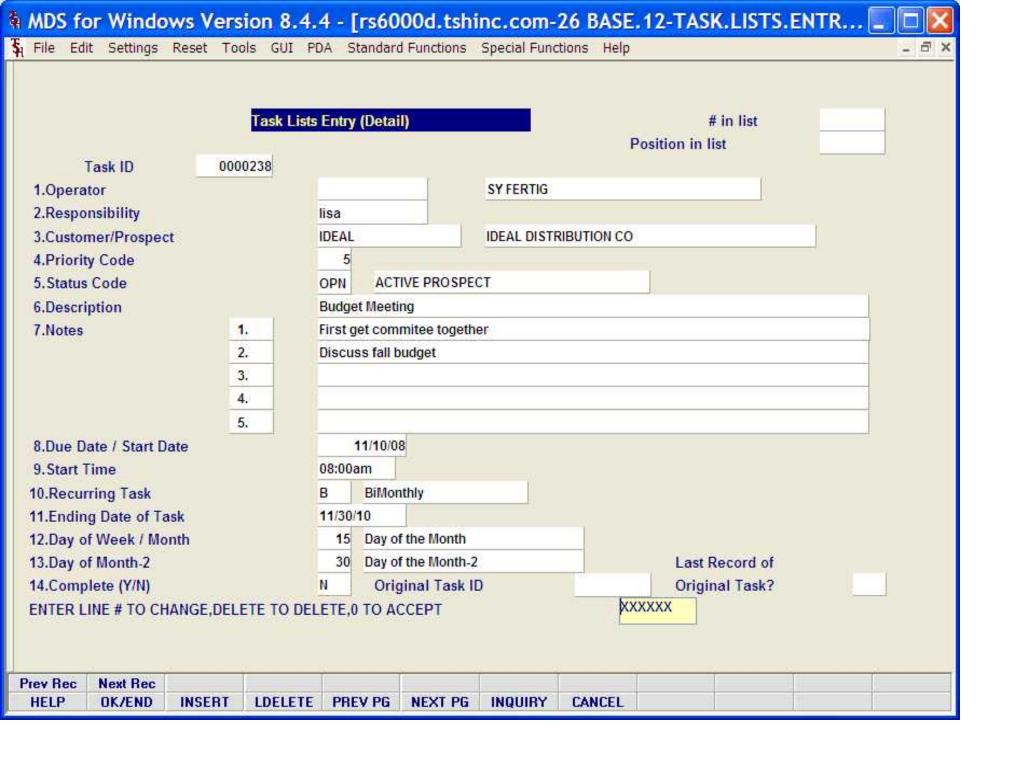
#### MDS for Windows Version 8.4.4 - [rs6000d.tshinc.com-26 BASE.12-TASK.LISTS.SUM... File Edit Settings Reset Tools GUI PDA Standard Functions Special Functions Help Task Lists Entry (Summary) SY FERTIG Y Operator Allow # in list Responsibility To IDEAL IDEAL Customer/Prospect To Cust/Prospect Name **Priority Code** To Due Date To Description Status Code To State To **Customer Class** To TaskID Cust/Prospect Name Due.Date Description Ln# Respons Stat 1. 0000082 GMS IDEAL IDEAL DISTRIBUTION CO 10/16/06 Arrange demo date OPN IDEAL 2. 0000084 SF IDEAL DISTRIBUTION CO 10/16/06 new system ABC IDEAL OPN 3. **IDEAL DISTRIBUTION CO** 11/10/08 **Budget Meeting** 0000238 lisa 4. 0000233 GMS IDEAL IDEAL DISTRIBUTION CO 12/01/08 Put together powerp OPN 5. 6. 7. 8. XXXXXX Enter Line# for Detail or S to Change Search Criteria Add Tasks Search HELP **OK/END** INSERT LDELETE PREV PG **NEXT PG** INQUIRY CANCEL

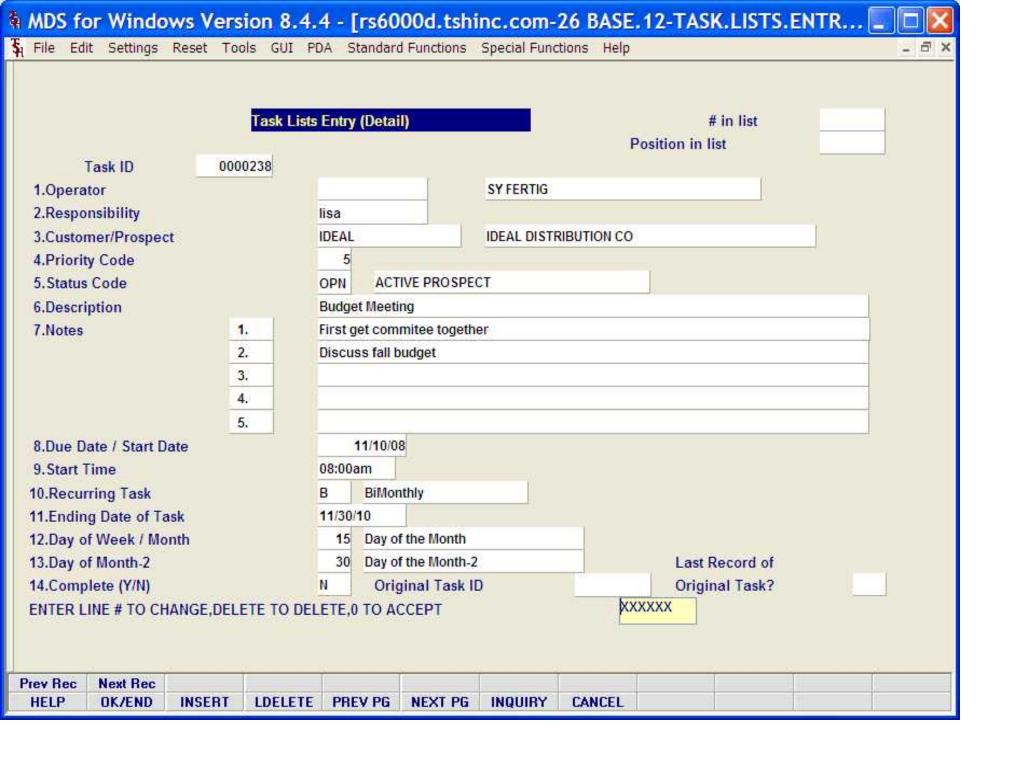
#### MDS for Windows Version 8.4.4 - [rs6000d.tshinc.com-26 BASE.12-TASK.LISTS.SUM... File Edit Settings Reset Tools GUI PDA Standard Functions Special Functions Help Task Lists Entry (Summary) SY FERTIG Y Operator Allow # in list Responsibility To IDEAL IDEAL Customer/Prospect To Cust/Prospect Name **Priority Code** To Due Date To Description Status Code To State To **Customer Class** To TaskID Cust/Prospect Name Due.Date Description Ln# Respons Stat 1. 0000082 GMS IDEAL IDEAL DISTRIBUTION CO 10/16/06 Arrange demo date OPN IDEAL 2. 0000084 SF IDEAL DISTRIBUTION CO 10/16/06 new system ABC IDEAL OPN 3. **IDEAL DISTRIBUTION CO** 11/10/08 **Budget Meeting** 0000238 lisa 4. 0000233 GMS IDEAL IDEAL DISTRIBUTION CO 12/01/08 Put together powerp OPN 5. 6. 7. 8. XXXXXX Enter Line# for Detail or S to Change Search Criteria Add Tasks Search HELP **OK/END** INSERT LDELETE PREV PG **NEXT PG** INQUIRY CANCEL

#### File Edit Settings Reset Tools GUI PDA Standard Functions Special Functions Help \_ 5 X Task Lists Entry (Summary) SY FERTIG Y Operator Allow # in list Responsibility To IDEAL IDEAL Customer/Prospect To Cust/Prospect Name **Priority Code** To Due Date To Description Status Code To State To **Customer Class** To Ln# TaskID Cust/Prospect Name Due.Date Description Respons Stat 1. 0000082 MS IDEAL IDEAL DISTRIBUTION CO 10/16/06 Arrange demo date OPN 0000084 SF IDEAL 2. IDEAL DISTRIBUTION CO 10/16/06 new system ABC IDEAL 00002381 sa **IDEAL DISTRIBUTION CO** 11/10/08 **Budget Meeting** OPN 3. 4. 0000233 GMS IDEAL IDEAL DISTRIBUTION CO 12/01/08 Put together powerp OPN 5. 6. 7. 8. XXXXXX Enter Line# for Detail or S to Change Search Criteria Add Tasks Search **OK/END** INSERT LDELETE PREV PG **NEXT PG** INQUIRY CANCEL HELP

MDS for Windows Version 8.4.4 - [rs6000d.tshinc.com-26 BASE.12-TASK.LISTS.SUM...







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

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 TASK ID	OPR	RESPONS	A. CUST. NO	PRI	DUE DATE DESCRIPTION	STAT.CODE	STAT.DATE	RECC	END.DATE	DAY.WK.MM/
	. (37,8335), 55)					VELTER PER LINETO			A.195705		11/2023276270000
0000080		SY1	0045	DRACE		10/16/06 PRODUCT GUIDE	ABC	10/16/06	H		
0000081		SYL	COMS	GRACE	1	12/17/07 TEST	5.5	12/17/07	И		
0000082		SYL	OMS	IDEAL		10/16/06 Arrange demo date	OPH	11/04/08	H		
0000083		SYL	OMS	GRACE		10/16/06 TET	A00-00-0	10/16/06	M		
0000084		SYL	SF	IDEAL	1	10/16/06 new system	ABC	11/04/08	H		
0000085		SYL	OMS	GRACE		10/16/06		10/16/06	H		
0000087	1800000	SY1	OMS	GRACE		10/16/06 TEST		10/16/06	H		
0000088	0000081	SYL	COMS	GRACE		10/17/06 TEST		10/16/06	H		
0000089	0000091	SY1	OMS	GRACE		10/18/06 TEST		10/16/06	31		
0000090	0000081	SYL	OMS	ORACE		10/19/06 TEST		10/16/06	M		
0000091	0000081	SY1	OMS	URACE		10/20/06 TEST		10/16/06	H		
0000092	0000082	SX1	<b>0MS</b>	ORACE		10/16/06 TESTING		10/16/06	H		
0000093	0000082	SYL	GMS	ORACE		10/23/06 TESTING		10/16/06	H		
0000094	0000082	SYL	OMS	GRACE		10/30/06 TESTING		10/16/06	N		
0000095	0000082	SYL	OMS	ORACE		11/06/06 TESTING		10/16/06	M		
0000096	0000082	SYL	OMS	ORACE		11/13/06 TESTING		10/16/06	Ħ		
0000097	0000083	SYL	OMS	GRACE		10/16/06 TET		10/16/06	M		
0000098	0000083	SY1	CDMS	GRACE		11/16/06 TET		10/16/06	M		
0000099	0000083	811	OMS	ORACE		12/16/06 TET		10/16/06	H		
0000100	0000084	SY1	GMS	GRACE		10/16/06 TEST 1		10/16/06	H		
0000101	0000084	SYL	CMS	GRACE		10/20/06 TEST 1		10/16/06	H		
0000102	0000084	SY1	OMS	GRACE		11/16/06 TEST 1		10/16/06	H		
0000103	0000084	SYL	GMS	ORACE		11/20/06 TEST 1		10/16/06	H		
0000104	0000084	SY1	OMS	GRACE		12/16/06 TEST 1		10/16/06	38		
0000105	0000085	SY1	OMS	ORACE		10/16/06		10/16/06	M		
0000106	0000085	SYL	OMS	ORACE		10/16/07		10/16/06	H		
0000107	0000085	SYL	OMS	GRACE		10/16/08		10/16/06	M		
0000122	0000081	SYL	OMS	GRACE	1	12/20/07 TEST	5.5	12/17/07	M		
0000125		SY1	david	L-MODELT M		08/22/08 Call Prospect david	OPN	08/01/08	H		
0000233		SYL	OMS	IDBAL	1	12/01/08 Put together powerpoint for	OPH	09/25/08	H		
0000238		971	lisa	IDEAL	5	11/10/08 Budget Heeting	OPH	11/04/08	В	11/30/10	15/30

<sup>31</sup> 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