The Systems House, Inc.

mds NX

MDS Enhancements

TSH User Group Meeting 2014

Magic And Sorcery….

Learning how your MDS System really works.

Cases Completed By System Area

MDS Base Modifications

Accts Payable	4
Accts Receivable	2
General Ledger	4
Inquiries	23
Inventory	12
File Maintenance	45
Order Entry	101

ODBC	12
Purchasing	19
Pricing	9
Remotenet	68
Reporting	28
General System	19
Pharma	8

392 Cases Updated this Year

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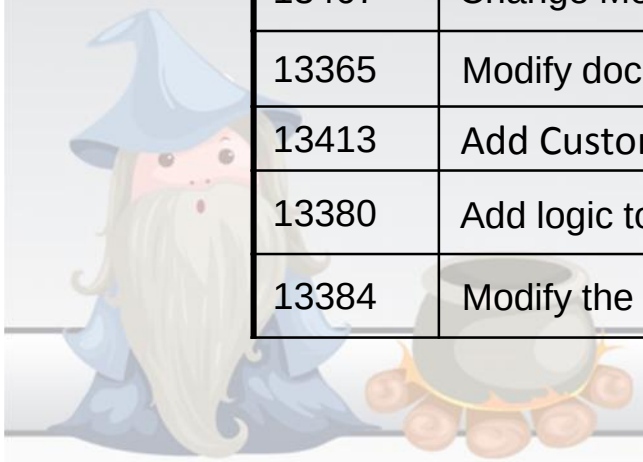
166 Total Customer Cases Updated

Customer Requested Enhancements

Case	Description
13160	Modify Purchase Order Maintenance to allow you to manually reopen a Drop Ship PO line that has been closed..
13195	Add a program to "Invoice Releases with Failed CC Auth Codes" to the A/R Menu.
13654	Modify the Open Order Detail Inquiry to allow entry of a "P" and a Pro Forma #
13569	Add PO# to the Sales Tracing Export to Excel.
13509	Add a new dictionary to PROD.MAST_MDS.ODBC which shows Availability without including ON PO.
13372	Add Menu Option to Create Alerts by salesman for sales managers and sales rep
13415	Add method to cancel order from Order Entry Line items - don't force to total time
13467	Change Mouseover to Popups Web Search Results Page - for tablets, phones, mobile
13365	Modify document.messages maint for a company wide message for emails and faxes
13413	Add Customers Invoices and Statements to Remotenet if a pdf is in the archive
13380	Add logic to MDS NX to allow for a Customer Item# field on the Product Tab.
13384	Modify the Lookups to have a Save button which will save all the current positions



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Updated Customer Support Tools

- TSH User Forum
- Online Training Videos
- Updated Guides
- Updated Data Dictionary

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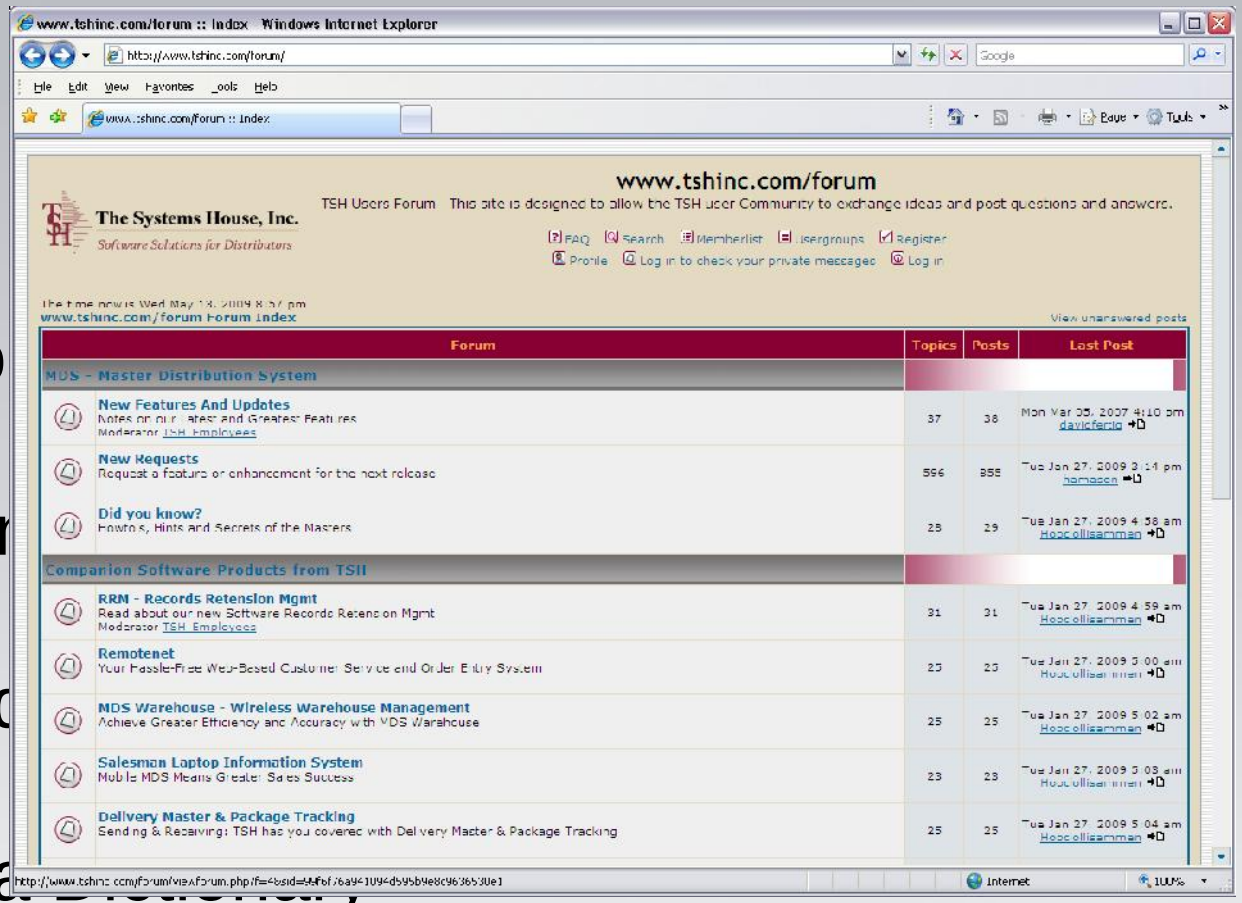
Updated Customer Support Tools

- TSH User Fo
- Online Trainir
- Updated Guic
- Updated Data



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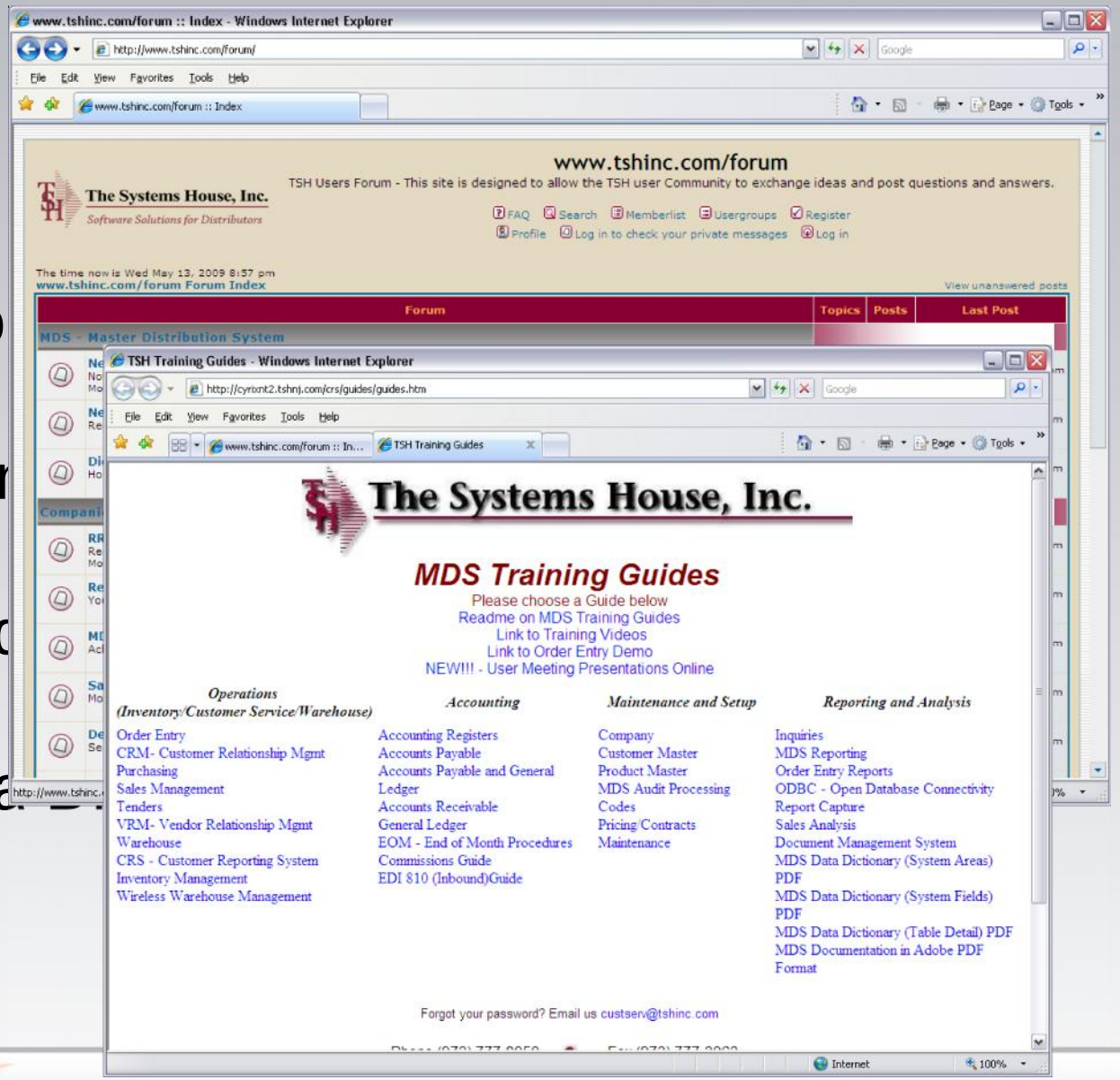
Updated Customer Support Tools

- TSH User Fo
- Online Trainir
- Updated Guic
- Updated Data



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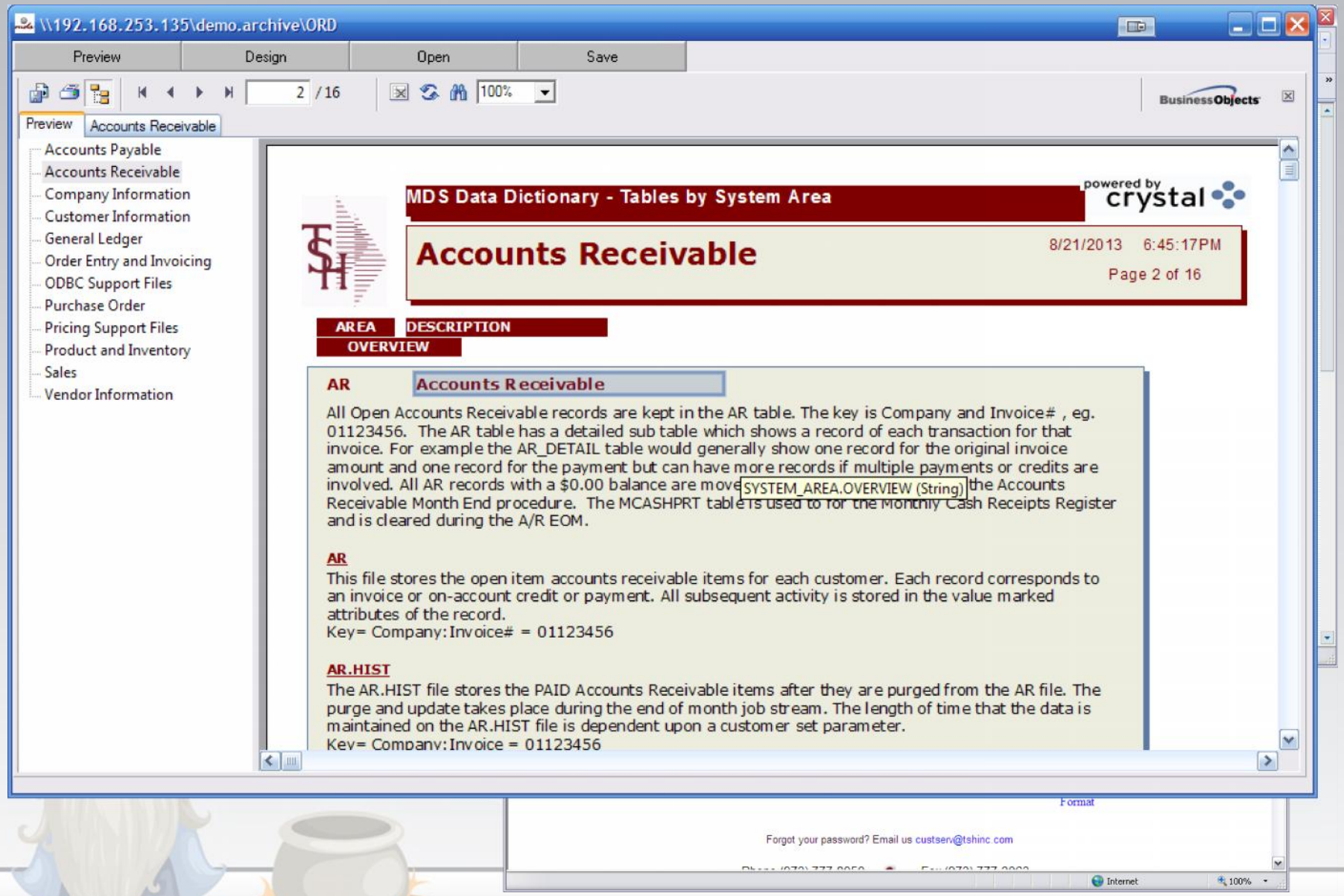
Updated Customer Support Tools



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Updated Customer Support Tools

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MDS Magic and Sorcery

- Apply Analytical Processing Power to create KPI's , Trend Graphs and Data Points
- Generate reusable simplified and automated business processes
- Customize and Beautify your customer communication
- Take advantage of Omni Channel Marketing with email, social media and traditional communications

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Data Analytics

- Trending KPI's – How are we doing?
- Create a set of Metrics to compare your status to a prior period

  Example: Sales dollars vs

  - Previous day
  - Previous week
  - Previous month
  - Previous year

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Data Analysis

Example: Sales dollars vs

- Previous day
- Previous week
- Previous month
- Previous year

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Data Analysis

Example: Sales dollars vs

Key Indicators

Charts | Key Indicators

Indicator	Daily	Monthly	This Year	Last Year
Sales Dollars Daily - Trend Statistics	0%	0%	-40%	137%
Sales Dollars Monthly - Trend Statistics	1%	48%	684%	515%
Sales Dollars Yearly - Trend Statistics	0%	42%	152%	144%

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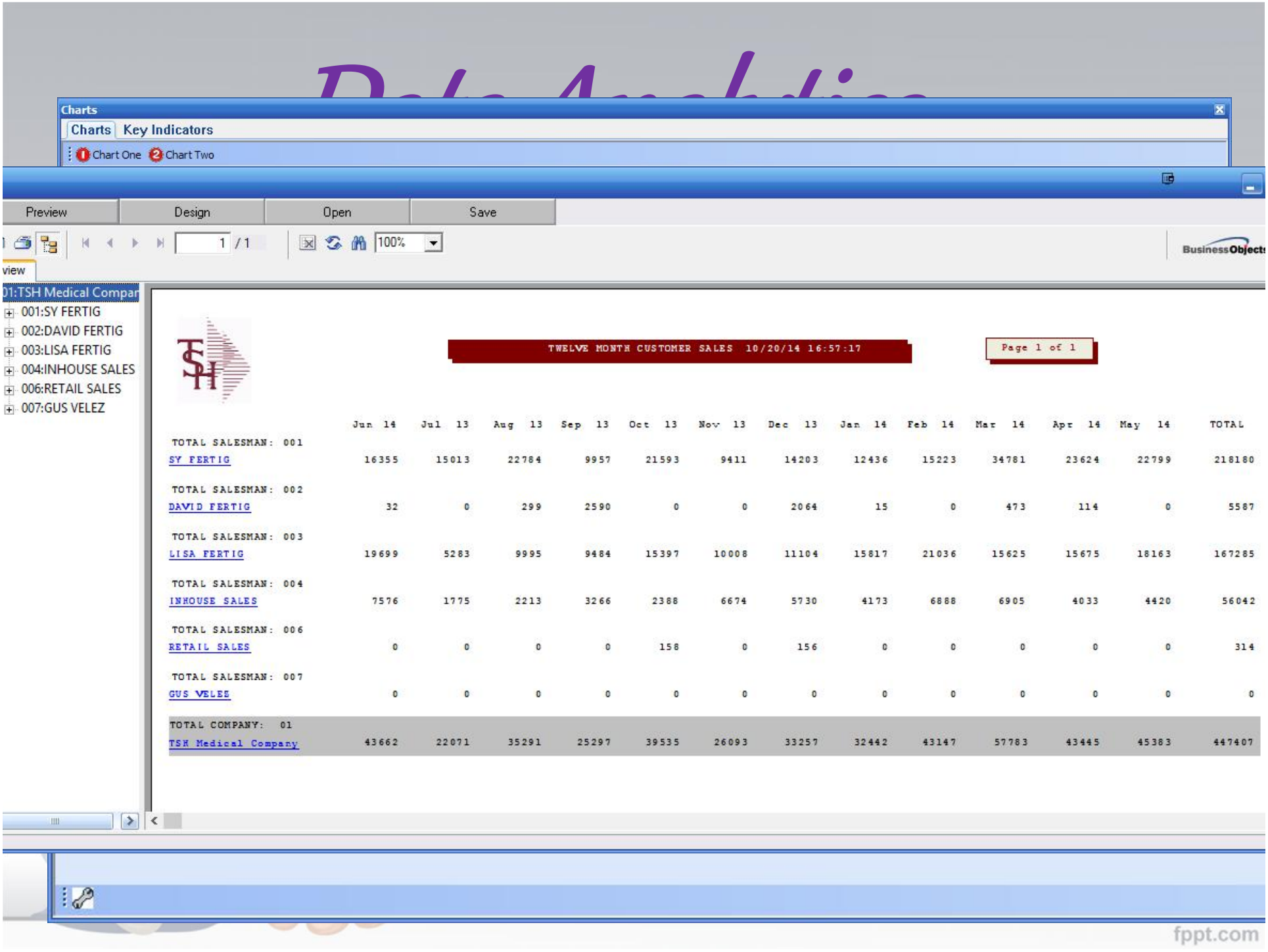
Charts
Charts
Key Indicators
Chart One
Chart Two
Preview
Design
Open
Save
1 / 1
100%
BusinessObjects
view
01:TSH Medical Compar
001:SY FERTIG
002:DAVID FERTIG
003:LISA FERTIG
004:INHOUSE SALES
006:RETAIL SALES
007:GUS VELEZ
TWELVE MONTH CUSTOMER SALES 10/20/14 16:57:17
Page 1 of 1
Jun 14 Jul 13 Aug 13 Sep 13 Oct 13 Nov 13 Dec 13 Jan 14 Feb 14 Mar 14 Apr 14 May 14 TOTAL
TOTAL SALESMAN: 001
SY FERTIG 16355 15013 22784 9957 21593 9411 14203 12436 15223 34781 23624 22799 218180
TOTAL SALESMAN: 002
DAVID FERTIG 32 0 299 2590 0 0 2064 15 0 473 114 0 5587
TOTAL SALESMAN: 003
LISA FERTIG 19699 5283 9995 9484 15397 10008 11104 15817 21036 15625 15675 18163 167285
TOTAL SALESMAN: 004
INHOUSE SALES 7576 1775 2213 3266 2388 6674 5730 4173 6888 6905 4033 4420 56042
TOTAL SALESMAN: 006
RETAIL SALES 0 0 0 0 158 0 156 0 0 0 0 0 314
TOTAL SALESMAN: 007
GUS VELEZ 0 0 0 0 0 0 0 0 0 0 0 0 0
TOTAL COMPANY: 01
TSH Medical Company 43662 22071 35291 25297 39535 26093 33257 32442 43147 57783 43445 45383 447407
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Data Analytics

Individual Dashboards – How am I doing?

Default Dashboard Setup:

Operator Specific KPI	Salesman Specific KPI
Total Orders entered Total Lines entered Total Order Dollars Total Percentage of All Orders	Sales Dollars Return Dollars GP Percentage Initial Calls Total Calls

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SF-Localdemo - [djf-DEMO.12-MAIN.MENU]
File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help
Shortcuts
Application
Terminal
MDS Menu
MDS Menu Find
Home Back Help
Customer Service
Purchasing
Warehouse Management & Inventory
Sales Analysis
Sales Management Menu
Accounting Menu
File Maintenance
End of Period Processing
Utility Menu
Customer Special Programs
Optional Systems
Quick Search
Tasks
07/29/2014 8:00 am
Date Time Description Status D... O... Task Nu...
5/16/2014 02:00 pm Opportunity: ALB 5% / 25% Past 0000282
11/25/20... 09:00 pm Opportunity: ALB 25% x 50 ML WON 0000283
12/20/20... 12:30 am Opportunity: ALB 25% 50 ML Past 0000284
12/18/20... 10:00 am Opportunity: ALB 25% 100 ML WON 0000285
6/2/2014 10:30 pm Opportunity: ALB 25% 100 ML Past 0000286
6/2/2014 01:30 pm Opportunity: ALB 25% x 100... Past 0000287
11/25/20... 8:00 am Opportunity: ALB 25% 50 ML LOS 0000280
Products
Customers
Vendors
Key Indicators
Charts Key Indicators
Indicator Daily Monthly This Year Last Year
Sales Dollars Monthly - Trend Statistics 0% 0% 0% 0%
Number of Orders for Chad Salesgood 13 91 91
Number of Lines for Chad Salesgood 40 196 196
Order Dollars for Chad Salesgood $93,023 $628,309 $628,309
Pct of Orders for Chad Salesgood 57% 26% 26%
Sales Dollars for Slsm 001 Chad Salesgood $0 $38,038 $273,305
Returns Dollars for Slsm 001 Chad Salesgood $0 ($2,053) ($6,974)
GP Dollars for Slsm 001 Chad Salesgood $0 $1,481 $1,481
Oe Contacts Maint Drill Execinq Reports Capt Off View Crm.menu Vrm.menu
Help Ok/End Insert Delete Prev Next Inquiry Cancel Off Popup
The Systems House Ready
7/29/2014 5:58:14 PM CAP NUM SCRL

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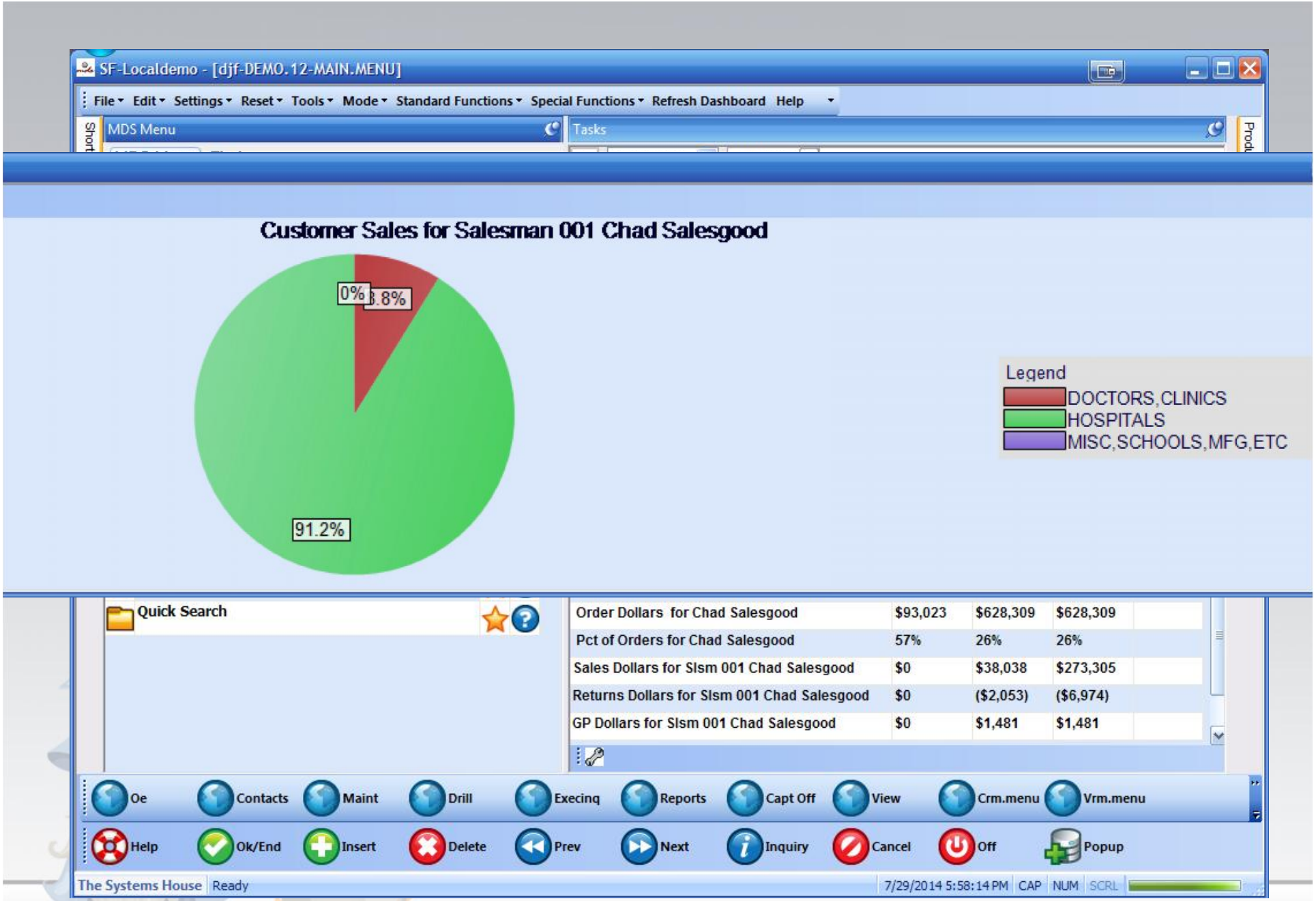
SF-Localdemo - [djf-DEMO.12-MAIN.MENU]
File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help
MDS Menu
Tasks
Customer Sales for Salesman 001 Chad Salesgood
0%
3.8%
91.2%
Legend
DOCTORS,CLINICS
HOSPITALS
MISC,SCHOOLS,MFG,ETC
Quick Search
Order Dollars for Chad Salesgood $93,023 $628,309 $628,309
Pct of Orders for Chad Salesgood 57% 26% 26%
Sales Dollars for Slsm 001 Chad Salesgood $0 $38,038 $273,305
Returns Dollars for Slsm 001 Chad Salesgood $0 ($2,053) ($6,974)
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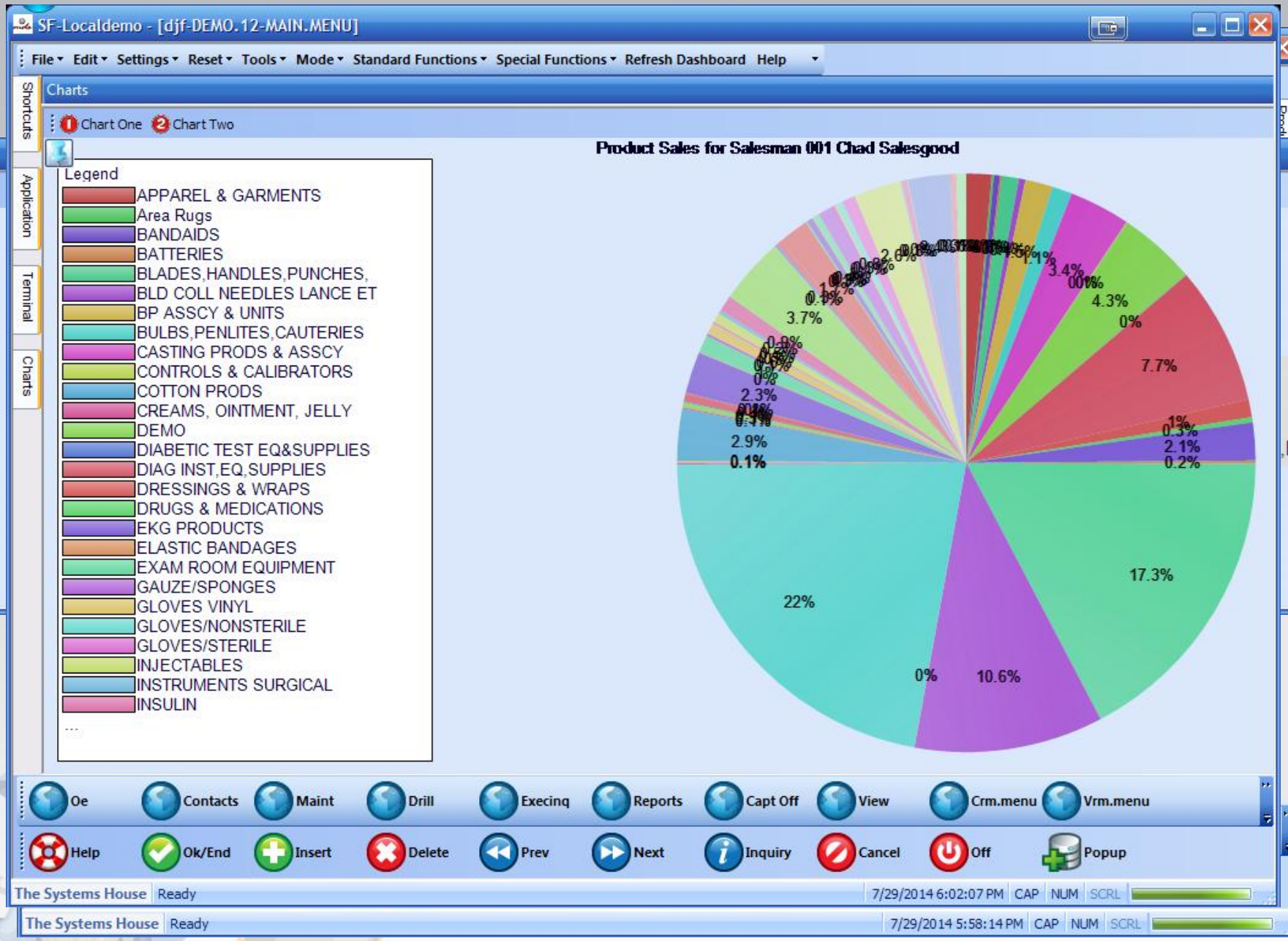
SF-Localdemo - [djf-DEMO.12-MAIN.MENU]
File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help
Shortcuts
Application
Terminal
Charts
Charts
Chart One
Chart Two
Product Sales for Salesman 001 Chad Salesgood
Legend
APPAREL & GARMENTS
Area Rugs
BANDAIDS
BATTERIES
BLADES,HANDLES,PUNCHES,
BLD COLL NEEDLES LANCE ET
BP ASSCY & UNITS
BULBS,PENLITES,CAUTERIES
CASTING PRODS & ASSCY
CONTROLS & CALIBRATORS
COTTON PRODS
CREAMS, OINTMENT, JELLY
DEMO
DIABETIC TEST EQ&SUPPLIES
DIAG INST,EQ,SUPPLIES
DRESSINGS & WRAPS
DRUGS & MEDICATIONS
EKG PRODUCTS
ELASTIC BANDAGES
EXAM ROOM EQUIPMENT
GAUZE/SPONGES
GLOVES VINYL
GLOVES/NONSTERILE
GLOVES/STERILE
INJECTABLES
INSTRUMENTS SURGICAL
INSULIN
...
3.7%
4.3%
0%
7.7%
2.3%
2.9%
0.1%
2.1%
0.2%
17.3%
22%
0%
10.6%
Oe
Contacts
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The Systems House
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7/29/2014 5:58:14 PM
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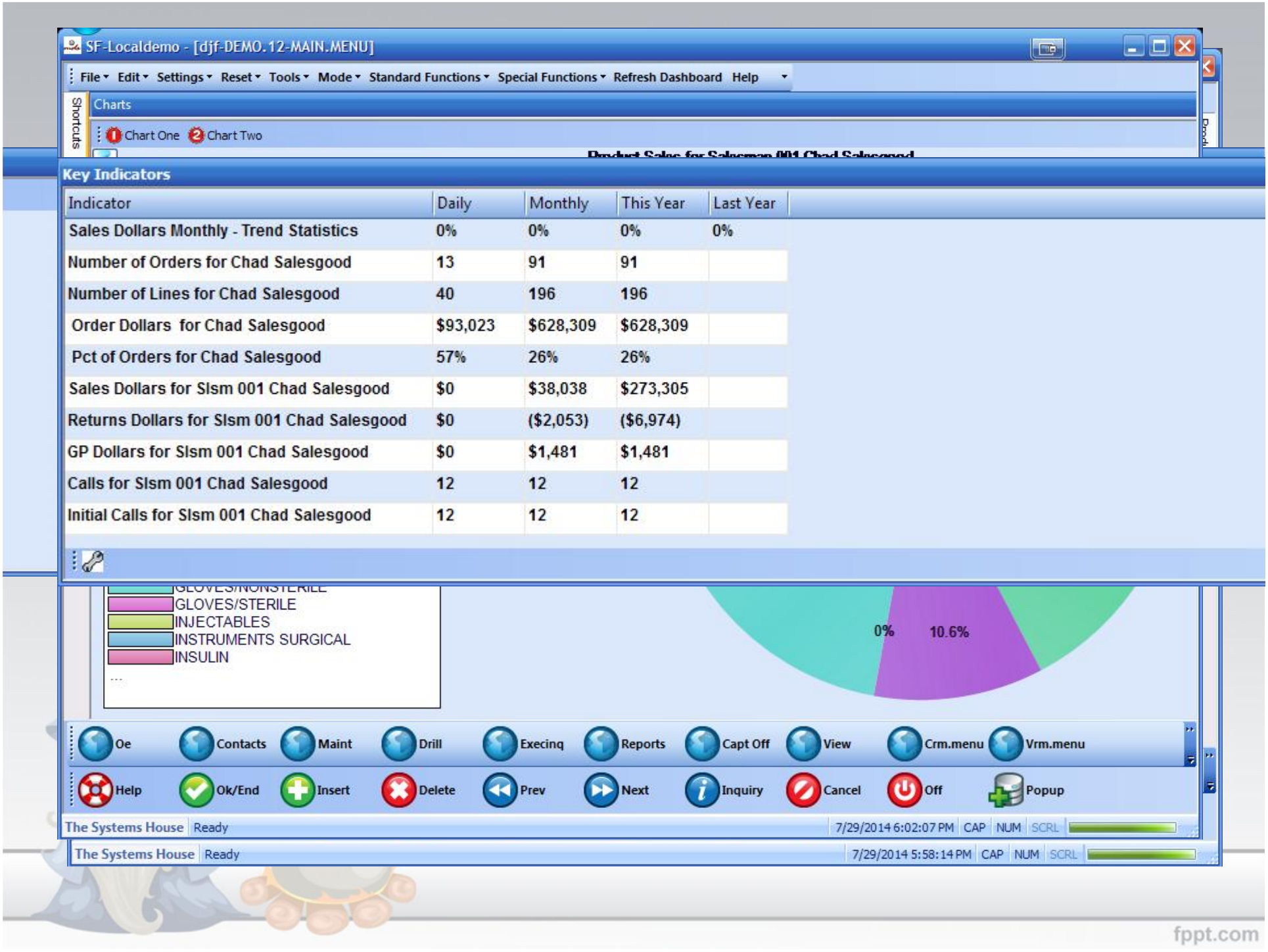
SF-Localdemo - [djf-DEMO.12-MAIN.MENU]
File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help
Shortcuts
Charts
Chart One
Chart Two
Key Indicators
Indicator
Daily
Monthly
This Year
Last Year
Sales Dollars Monthly - Trend Statistics 0% 0% 0% 0%
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Returns Dollars for Slsm 001 Chad Salesgood $0 ($2,053) ($6,974)
GP Dollars for Slsm 001 Chad Salesgood $0 $1,481 $1,481
Calls for Slsm 001 Chad Salesgood 12 12 12
Initial Calls for Slsm 001 Chad Salesgood 12 12 12
GLOVES/STERILE
INJECTABLES
INSTRUMENTS SURGICAL
INSULIN
0%
10.6%
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Contacts
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The Systems House
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Data Analytics

Measuring Customer Value

"Customer Stratification"

Measurements:

Sales Volume

Gross Margin

Cost to Service

Loyalty

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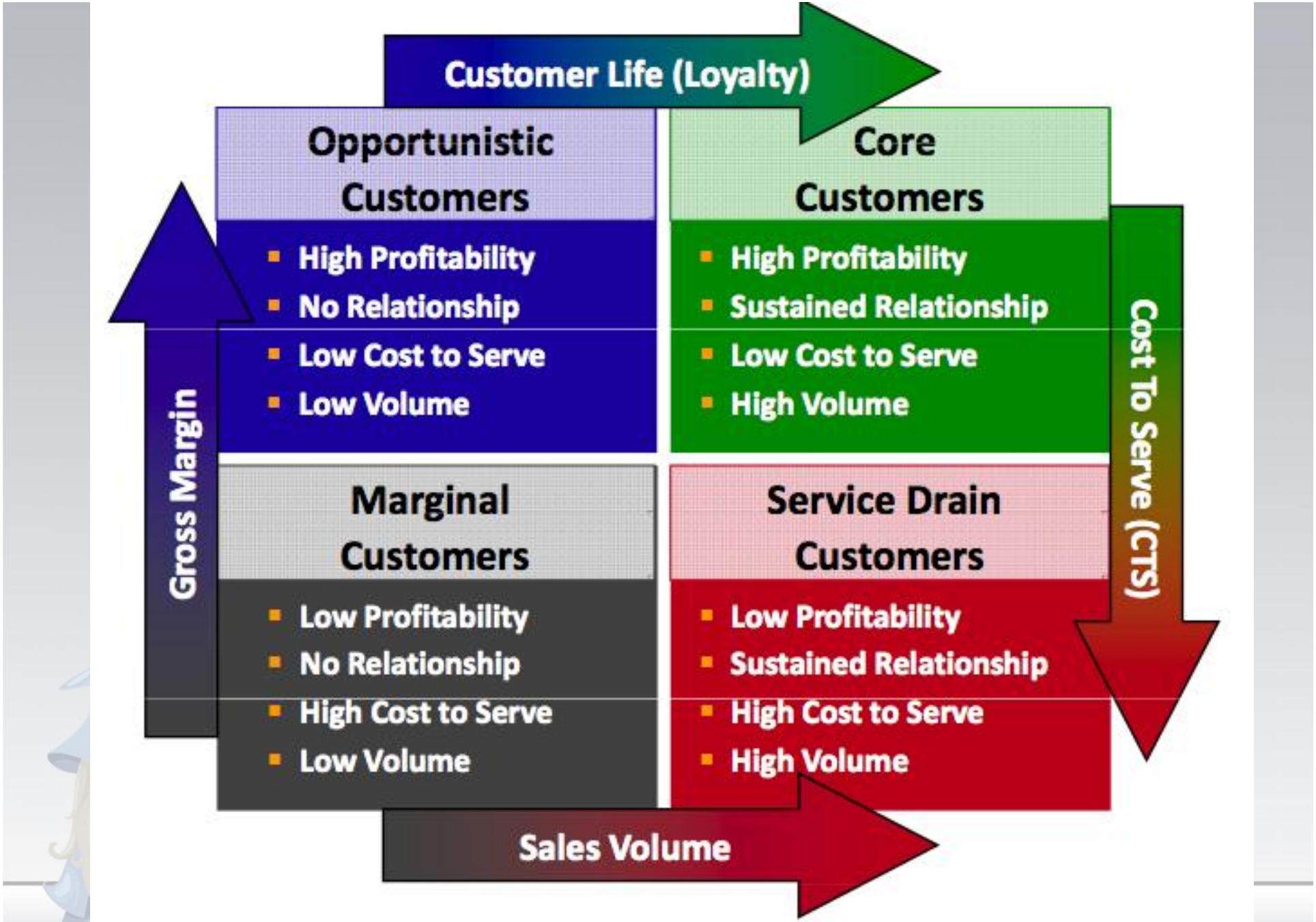
Customer Life (Loyalty)
Opportunistic Customers
High Profitability
No Relationship
Low Cost to Serve
Low Volume
Core Customers
High Profitability
Sustained Relationship
Low Cost to Serve
High Volume
Gross Margin
Cost To Serve (CTS)
Marginal Customers
Low Profitability
No Relationship
High Cost to Serve
Low Volume
Service Drain Customers
Low Profitability
Sustained Relationship
High Cost to Serve
High Volume
Sales Volume

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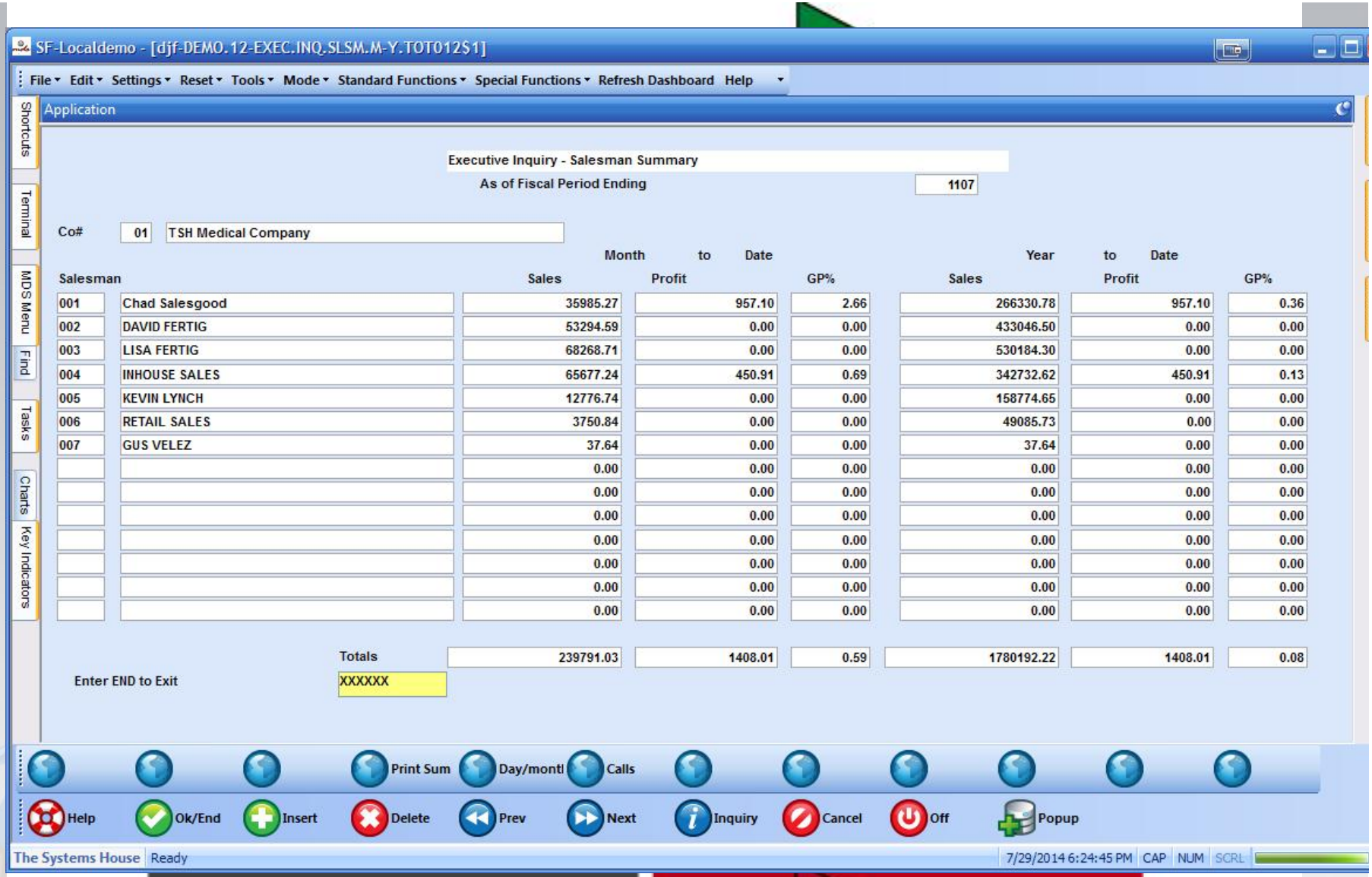
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File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help
Shortcuts
Terminal
MDS Menu
Find
Tasks
Charts
Key Indicators
Application
Executive Inquiry - Salesman Summary
As of Fiscal Period Ending 1107
Co# 01 TSH Medical Company
Month to Date
Year to Date
Salesman Sales Profit GP% Sales Profit GP%
001 Chad Salesgood 35985.27 957.10 2.66 266330.78 957.10 0.36
002 DAVID FERTIG 53294.59 0.00 0.00 433046.50 0.00 0.00
003 LISA FERTIG 68268.71 0.00 0.00 530184.30 0.00 0.00
004 INHOUSE SALES 65677.24 450.91 0.69 342732.62 450.91 0.13
005 KEVIN LYNCH 12776.74 0.00 0.00 158774.65 0.00 0.00
006 RETAIL SALES 3750.84 0.00 0.00 49085.73 0.00 0.00
007 GUS VELEZ 37.64 0.00 0.00 37.64 0.00 0.00
Totals 239791.03 1408.01 0.59 1780192.22 1408.01 0.08
Enter END to Exit XXXXXX
Print Sum
Day/montl
Calls
Help
Ok/End
Insert
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Popup
The Systems House
Ready
7/29/2014 6:24:45 PM
CAP
NUM
SCRL
Sales Volume

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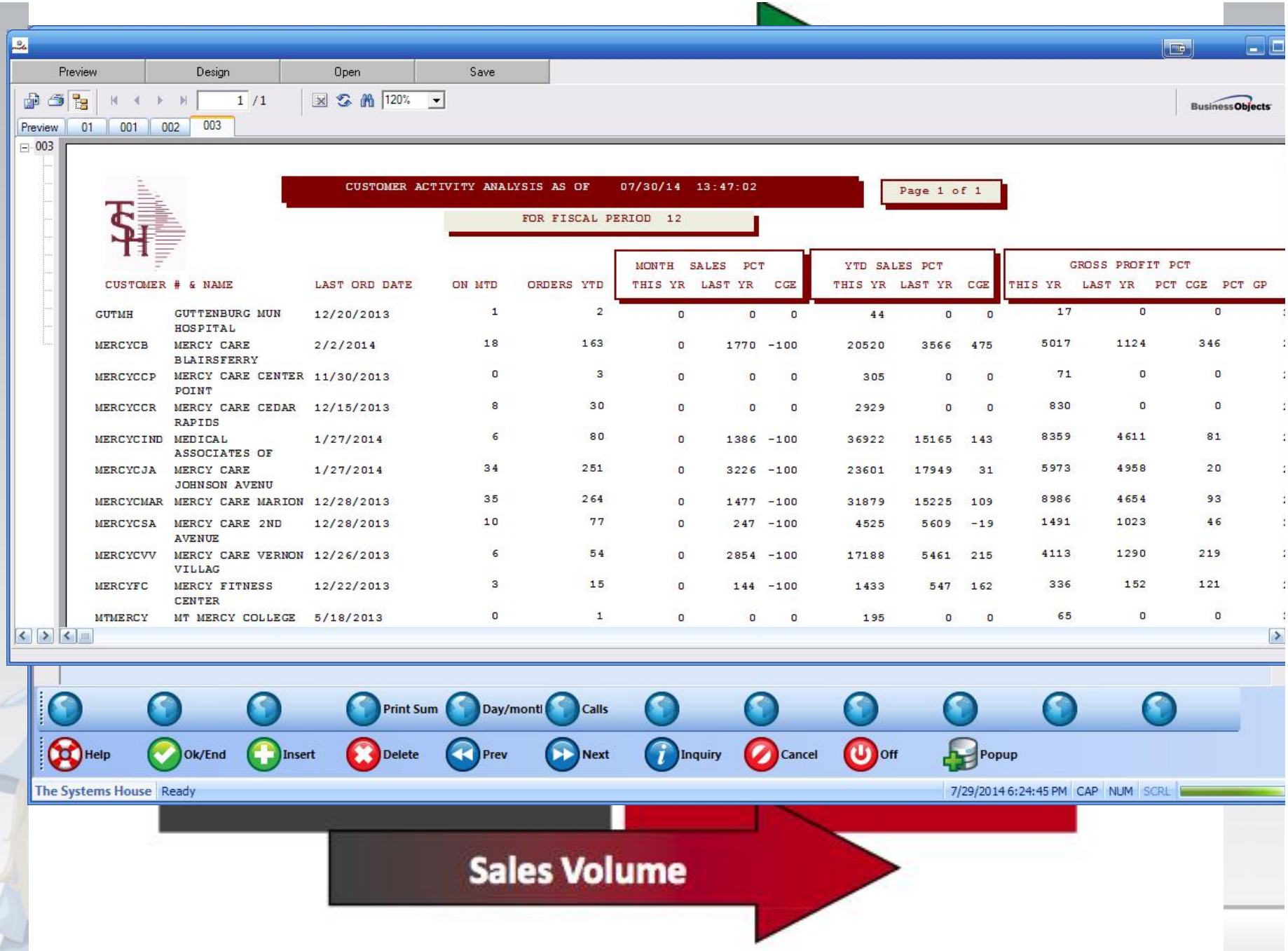
Preview
Design
Open
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1 /1
120%
BusinessObjects
Preview
01
001
002
003
003
CUSTOMER ACTIVITY ANALYSIS AS OF 07/30/14 13:47:02
Page 1 of 1
FOR FISCAL PERIOD 12
CUSTOMER # & NAME LAST ORD DATE ON MTD ORDERS YTD MONTH SALES PCT THIS YR LAST YR CGE YTD SALES PCT THIS YR LAST YR CGE GROSS PROFIT PCT THIS YR LAST YR PCT CGE PCT GP
GUTMH GUTTENBURG MUN HOSPITAL 12/20/2013 1 2 0 0 0 44 0 0 17 0 0
MERCYCB MERCY CARE BLAIRSFERRY 2/2/2014 18 163 0 1770 -100 20520 3566 475 5017 1124 346
MERCYCCP MERCY CARE CENTER POINT 11/30/2013 0 3 0 0 0 305 0 0 71 0 0
MERCYCCR MERCY CARE CEDAR RAPIDS 12/15/2013 8 30 0 0 0 2929 0 0 830 0 0
MERCYCIND MEDICAL ASSOCIATES OF 1/27/2014 6 80 0 1386 -100 36922 15165 143 8359 4611 81
MERCYCJA MERCY CARE JOHNSON AVENU 1/27/2014 34 251 0 3226 -100 23601 17949 31 5973 4958 20
MERCYCMAR MERCY CARE MARION 12/28/2013 35 264 0 1477 -100 31879 15225 109 8986 4654 93
MERCYCSA MERCY CARE 2ND AVENUE 12/28/2013 10 77 0 247 -100 4525 5609 -19 1491 1023 46
MERCYCVV MERCY CARE VERNON VILLAG 12/26/2013 6 54 0 2854 -100 17188 5461 215 4113 1290 219
MERCYFC MERCY FITNESS CENTER 12/22/2013 3 15 0 144 -100 1433 547 162 336 152 121
MTMERCY MT MERCY COLLEGE 5/18/2013 0 1 0 0 0 195 0 0 65 0 0
Print Sum
Day/month
Calls
Help
Ok/End
Insert
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Inquiry
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The Systems House
Ready
7/29/2014 6:24:45 PM
CAP
NUM
SCRL
Sales Volume

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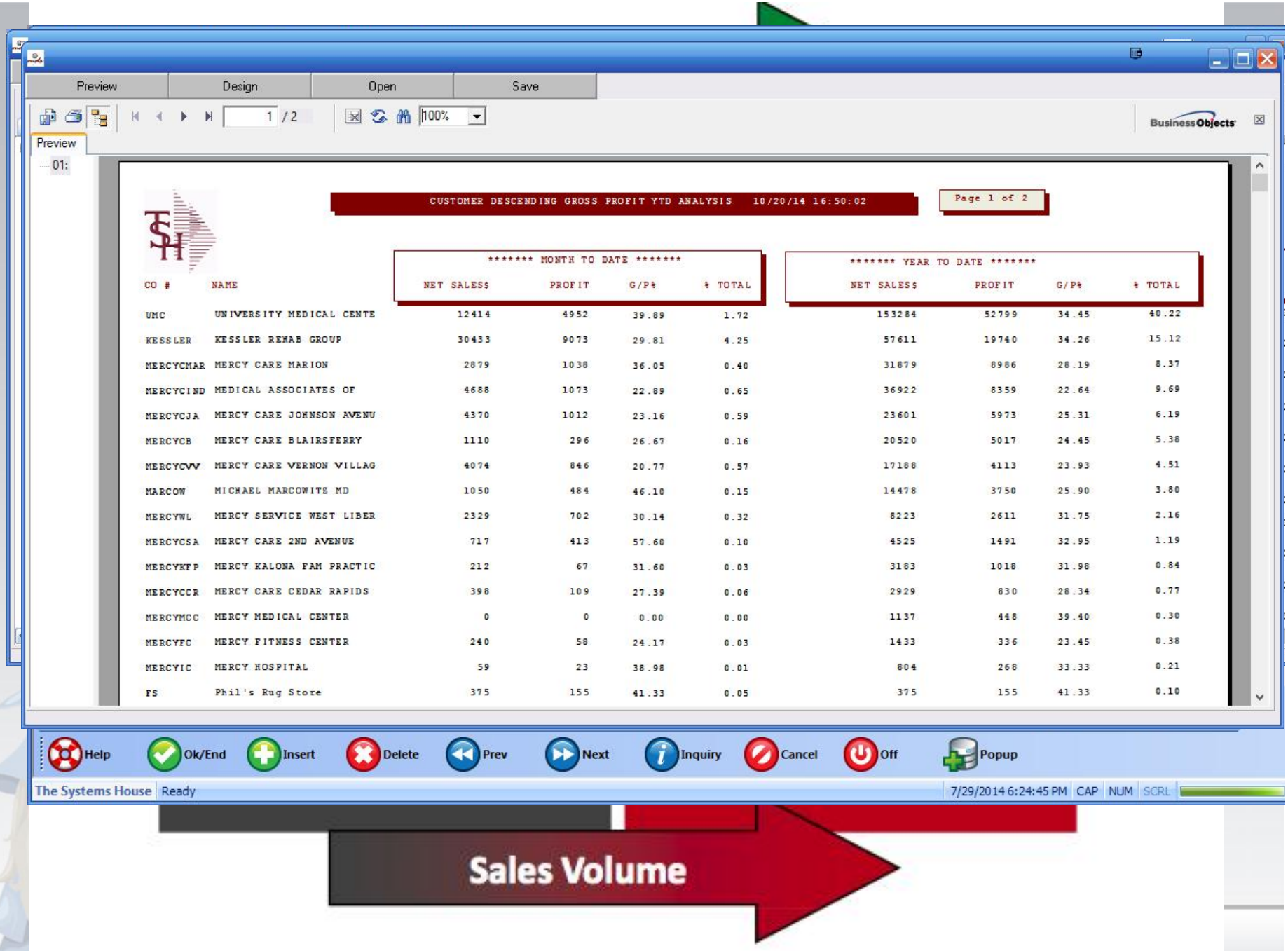

Sales Volume

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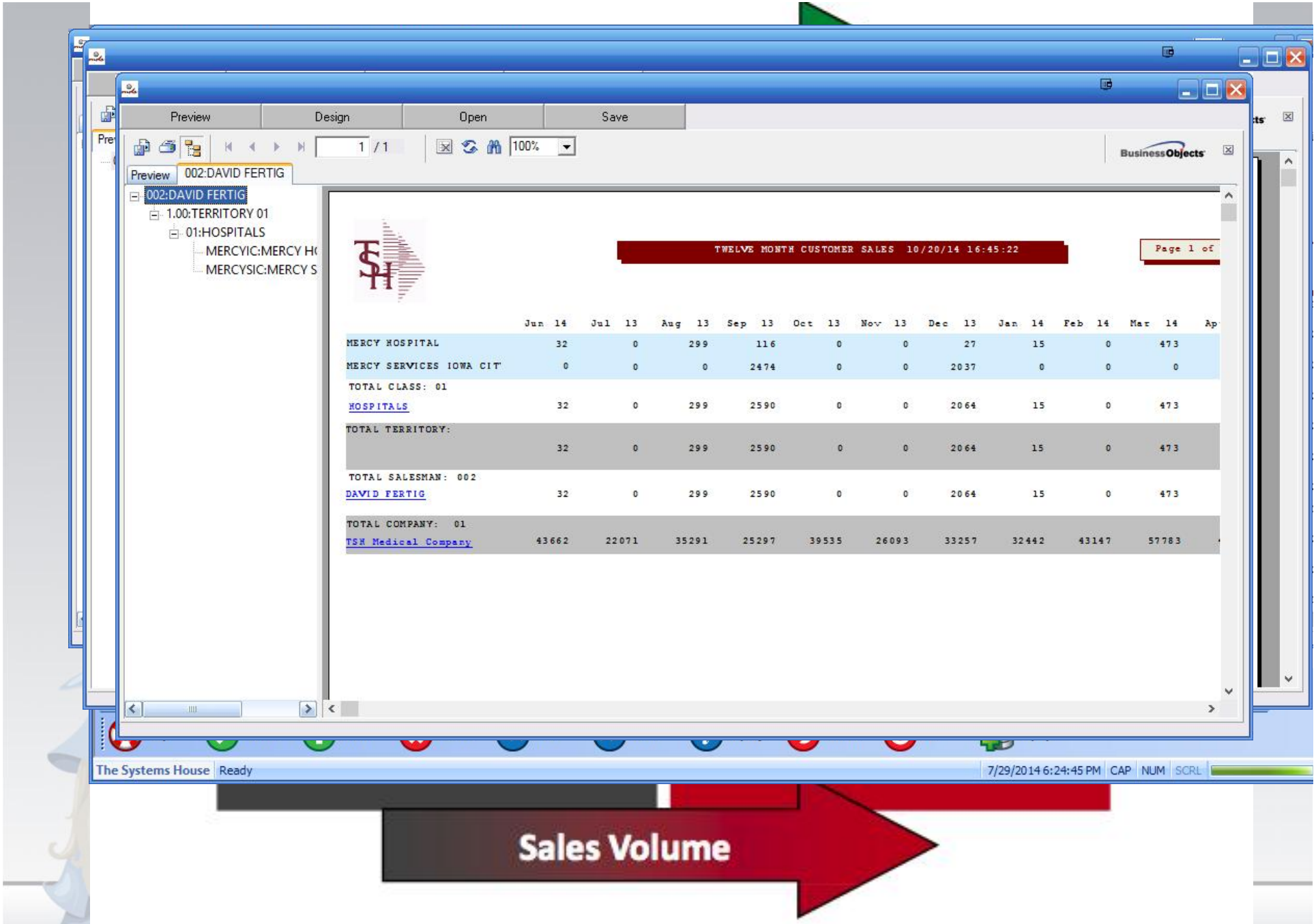
Preview
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BusinessObjects
Preview
002:DAVID FERTIG
002:DAVID FERTIG
1.00:TERRITORY 01
01:HOSPITALS
MERCYIC:MERCY H(
MERCYSIC:MERCY S
TWELVE MONTH CUSTOMER SALES 10/20/14 16:45:22
Page 1 of
Jun 14 Jul 13 Aug 13 Sep 13 Oct 13 Nov 13 Dec 13 Jan 14 Feb 14 Mar 14 Ap
MERCY HOSPITAL 32 0 299 116 0 0 27 15 0 473
MERCY SERVICES IOWA CIT 0 0 0 2474 0 0 2037 0 0 0
TOTAL CLASS: 01
HOSPITALS 32 0 299 2590 0 0 2064 15 0 473
TOTAL TERRITORY:
32 0 299 2590 0 0 2064 15 0 473
TOTAL SALESMAN: 002
DAVID FERTIG 32 0 299 2590 0 0 2064 15 0 473
TOTAL COMPANY: 01
TSH Medical Company 43662 22071 35291 25297 39535 26093 33257 32442 43147 57783
The Systems House
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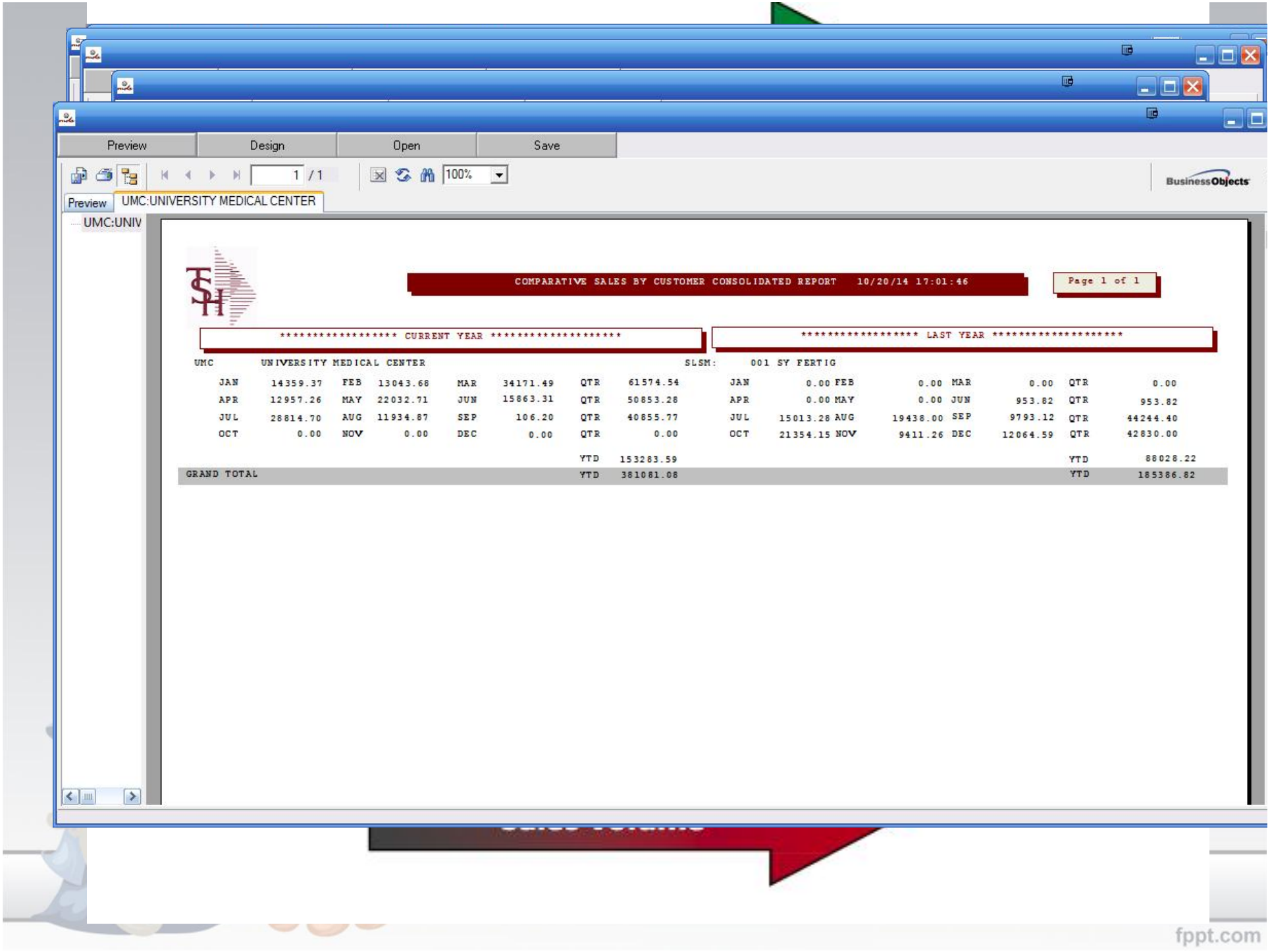
7/29/2014 6:24:45 PM
CAP
NUM
SCRL
Sales Volume

fppt.com


Preview
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1 / 1
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BusinessObjects
Preview
UMC:UNIVERSITY MEDICAL CENTER
UMC:UNIV
COMPARATIVE SALES BY CUSTOMER CONSOLIDATED REPORT 10/20/14 17:01:46
Page 1 of 1
********** CURRENT YEAR **********
********** LAST YEAR **********
UMC UNIVERSITY MEDICAL CENTER SLSM: 001 SY FERTIG
JAN 14359.37 FEB 13043.68 MAR 34171.49 QTR 61574.54 JAN 0.00 FEB 0.00 MAR 0.00 QTR 0.00
APR 12957.26 MAY 22032.71 JUN 15863.31 QTR 50853.28 APR 0.00 MAY 0.00 JUN 953.82 QTR 953.82
JUL 28814.70 AUG 11934.87 SEP 106.20 QTR 40855.77 JUL 15013.28 AUG 19438.00 SEP 9793.12 QTR 44244.40
OCT 0.00 NOV 0.00 DEC 0.00 QTR 0.00 OCT 21354.15 NOV 9411.26 DEC 12064.59 QTR 42830.00
YTD 153283.59 YTD 88028.22
GRAND TOTAL YTD 381081.08 YTD 185386.82

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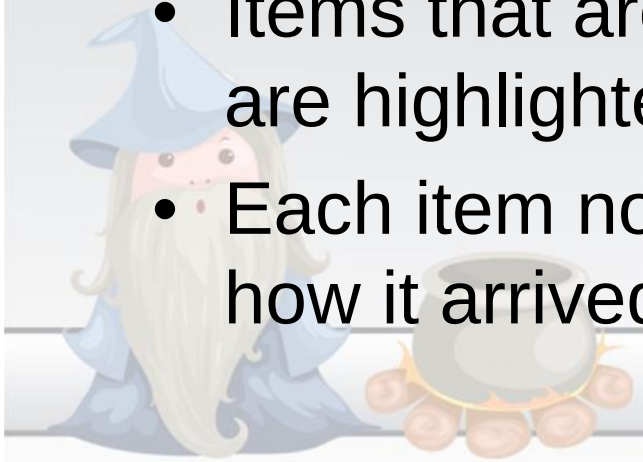
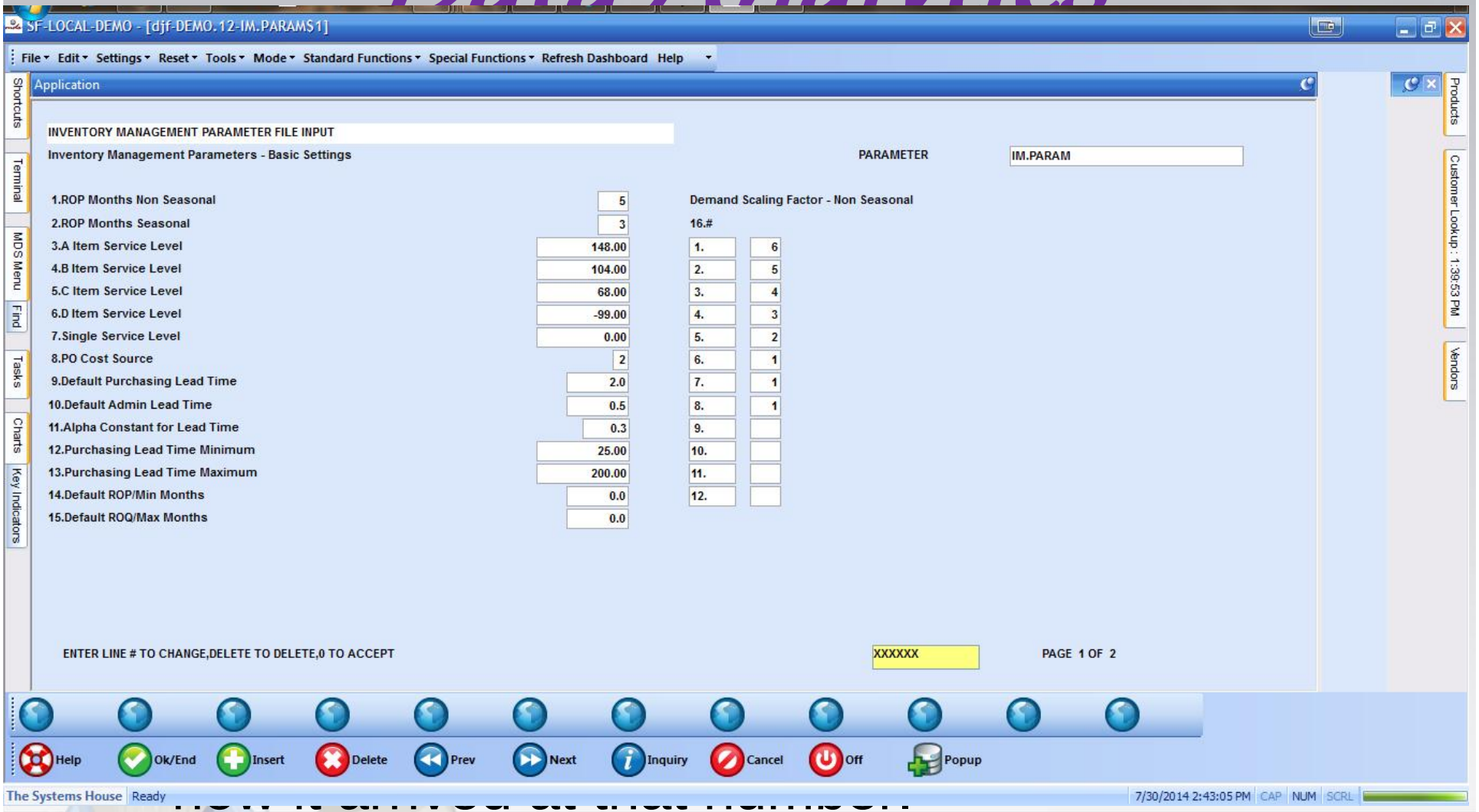
Data Analytics

- Product Stratification, finding out what items should not be part of your product offering.
- We offer ABC analysis which builds safety stock with the latest release we allow for negative safety stock effectively allowing you to no longer order items considered as a “D” item.
- Items that are overridden with a manual ROP are highlighted in color.
- Each item now has an ROP Audit to show you how it arrived at that number.



fppt.com

Data Analytics



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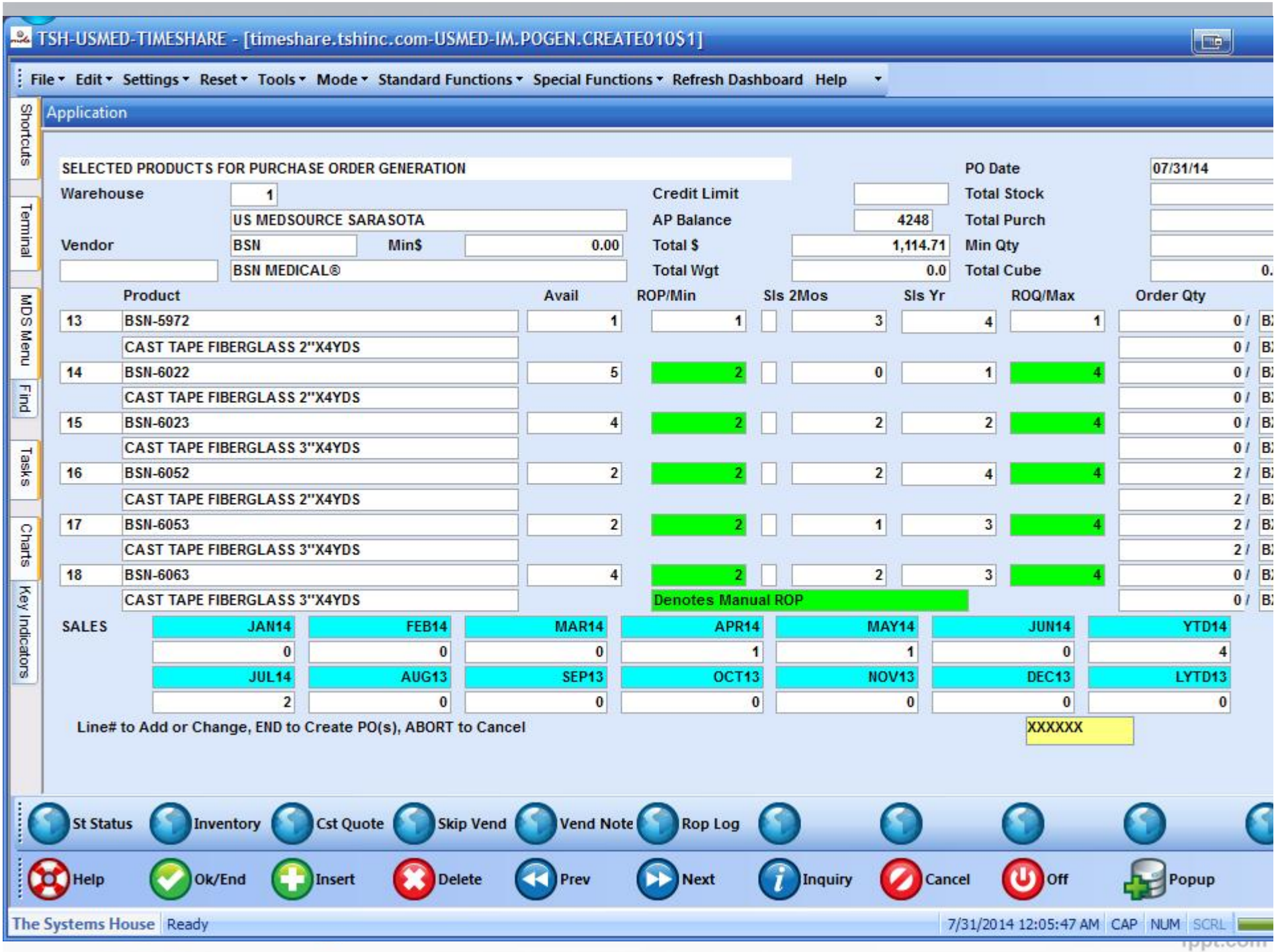
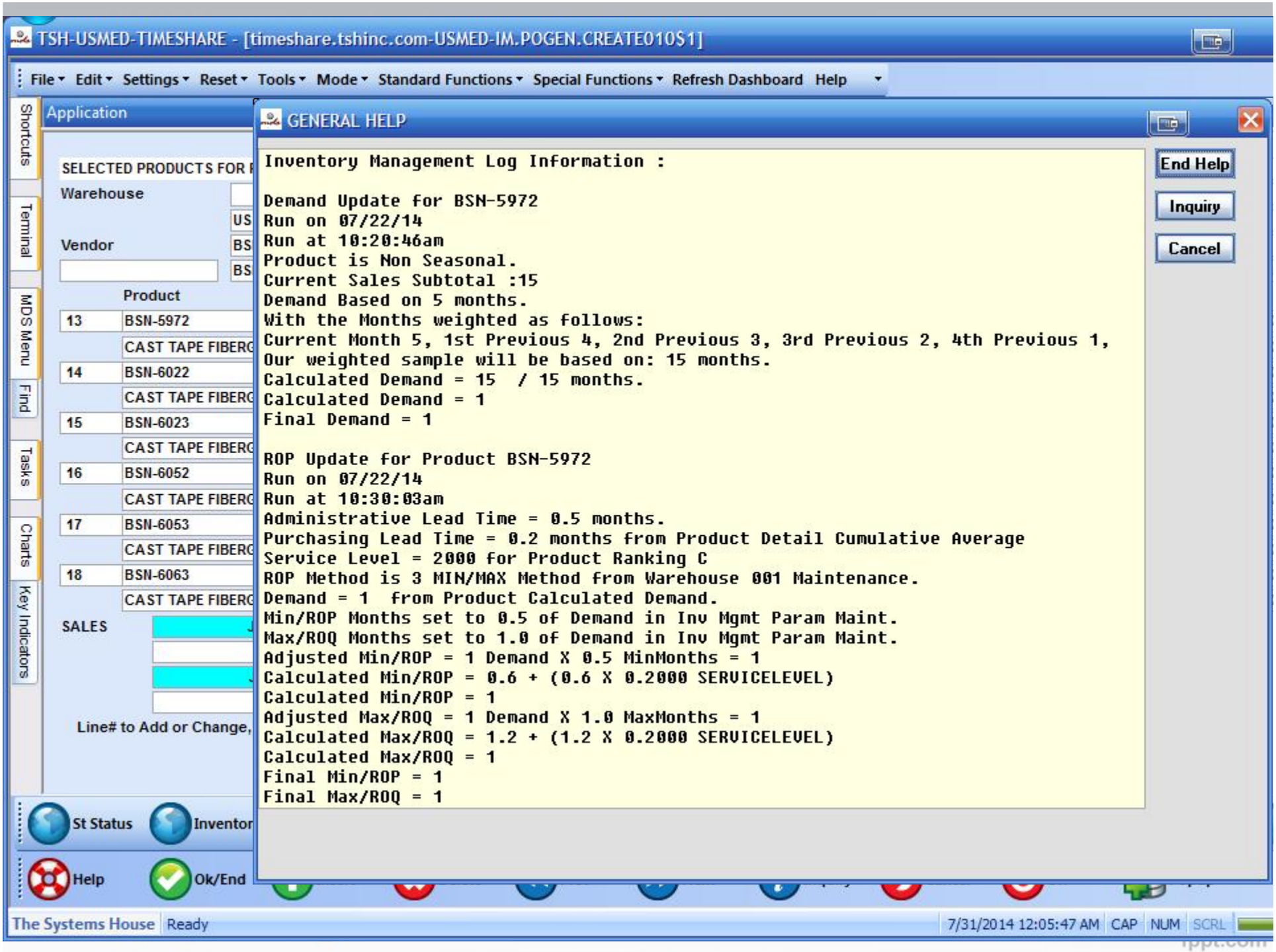
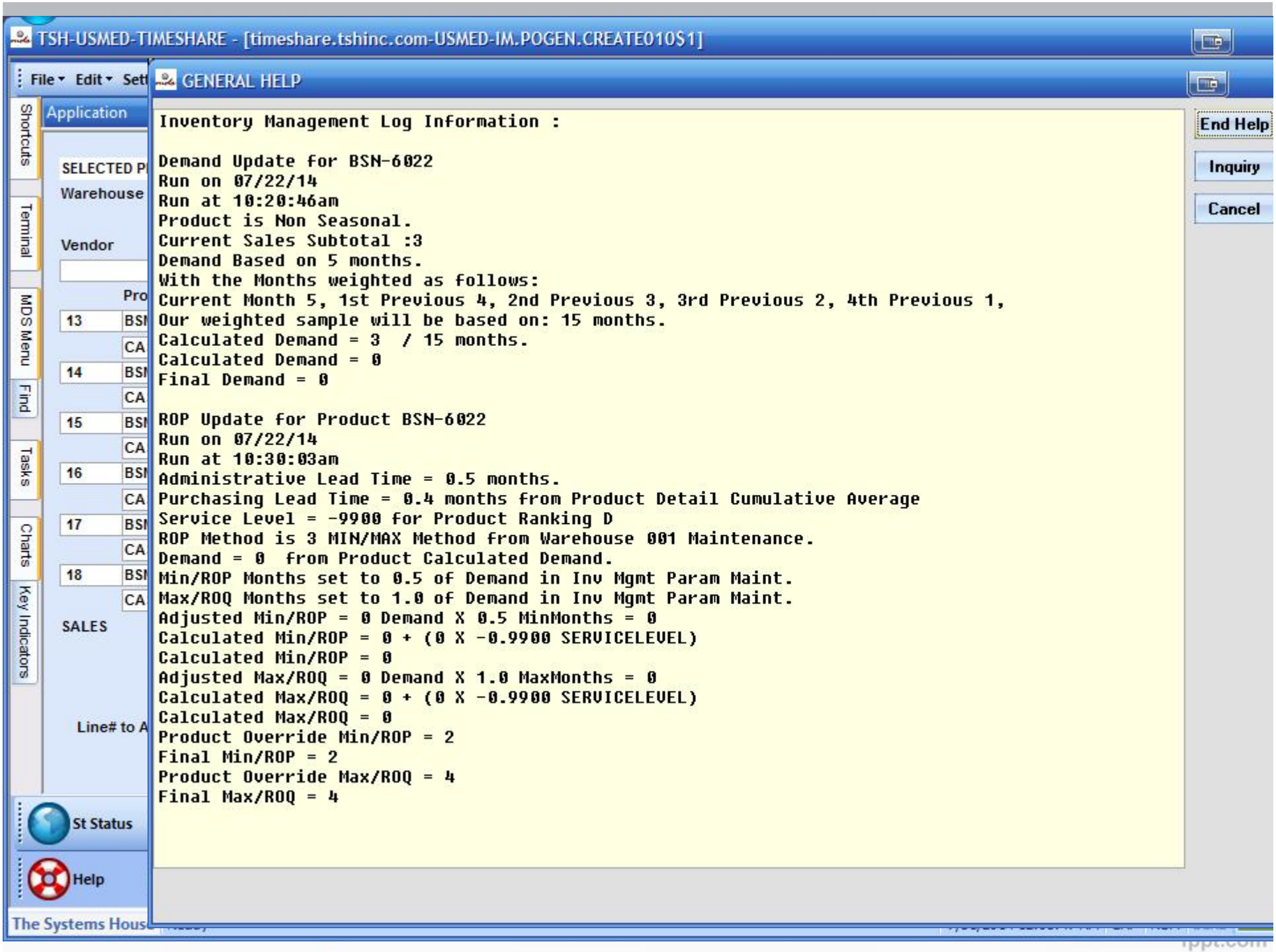

TSH-USMED-TIMESHARE - [timeshare.tshinc.com-USMED-IM.POGEN.CREATE010$1]
File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help
Shortcuts
Terminal
MDS Menu
Find
Tasks
Charts
Key Indicators
Application
SELECTED PRODUCTS FOR PURCHASE ORDER GENERATION
Warehouse 1
US MEDSOURCE SARASOTA
Vendor BSN Min$ 0.00
BSN MEDICAL®
Credit Limit
AP Balance 4248
Total $ 1,114.71
Total Wgt 0.0
PO Date 07/31/14
Total Stock
Total Purch
Min Qty
Total Cube 0.
Product Avail ROP/Min Sls 2Mos Sls Yr ROQ/Max Order Qty
13 BSN-5972 1 1 3 4 1 0 /
CAST TAPE FIBERGLASS 2"X4YDS 0 /
14 BSN-6022 5 2 0 1 4 0 /
CAST TAPE FIBERGLASS 2"X4YDS 0 /
15 BSN-6023 4 2 2 2 4 0 /
CAST TAPE FIBERGLASS 3"X4YDS 0 /
16 BSN-6052 2 2 2 4 4 2 /
CAST TAPE FIBERGLASS 2"X4YDS 2 /
17 BSN-6053 2 2 1 3 4 2 /
CAST TAPE FIBERGLASS 3"X4YDS 2 /
18 BSN-6063 4 2 2 3 4 0 /
CAST TAPE FIBERGLASS 3"X4YDS Denotes Manual ROP 0 /
SALES
JAN14 FEB14 MAR14 APR14 MAY14 JUN14 YTD14
0 0 0 1 1 0 4
JUL14 AUG13 SEP13 OCT13 NOV13 DEC13 LYTD13
2 0 0 0 0 0 0
Line# to Add or Change, END to Create PO(s), ABORT to Cancel
XXXXXX
St Status Inventory Cst Quote Skip Vend Vend Note Rop Log
Help Ok/End Insert Delete Prev Next Inquiry Cancel Off Popup
The Systems House Ready
7/31/2014 12:05:47 AM CAP NUM SCRL


TSH-USMED-TIMESHARE - [timeshare.tshinc.com-USMED-IM.POGEN.CREATE010$1]
File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help
Shortcuts
Terminal
MDS Menu
Find
Tasks
Charts
Key Indicators
Application
SELECTED PRODUCTS FOR
Warehouse
Vendor
Product
13 BSN-5972
CAST TAPE FIBERG
14 BSN-6022
CAST TAPE FIBERG
15 BSN-6023
CAST TAPE FIBERG
16 BSN-6052
CAST TAPE FIBERG
17 BSN-6053
CAST TAPE FIBERG
18 BSN-6063
CAST TAPE FIBERG
SALES
Line# to Add or Change,
St Status
Inventor
Help
Ok/End
GENERAL HELP
Inventory Management Log Information :
Demand Update for BSN-5972
Run on 07/22/14
Run at 10:20:46am
Product is Non Seasonal.
Current Sales Subtotal :15
Demand Based on 5 months.
With the Months weighted as follows:
Current Month 5, 1st Previous 4, 2nd Previous 3, 3rd Previous 2, 4th Previous 1,
Our weighted sample will be based on: 15 months.
Calculated Demand = 15 / 15 months.
Calculated Demand = 1
Final Demand = 1
ROP Update for Product BSN-5972
Run on 07/22/14
Run at 10:30:03am
Administrative Lead Time = 0.5 months.
Purchasing Lead Time = 0.2 months from Product Detail Cumulative Average
Service Level = 2000 for Product Ranking C
ROP Method is 3 MIN/MAX Method from Warehouse 001 Maintenance.
Demand = 1 from Product Calculated Demand.
Min/ROP Months set to 0.5 of Demand in Inv Mgmt Param Maint.
Max/ROQ Months set to 1.0 of Demand in Inv Mgmt Param Maint.
Adjusted Min/ROP = 1 Demand X 0.5 MinMonths = 1
Calculated Min/ROP = 0.6 + (0.6 X 0.2000 SERVICELEVEL)
Calculated Min/ROP = 1
Adjusted Max/ROQ = 1 Demand X 1.0 MaxMonths = 1
Calculated Max/ROQ = 1.2 + (1.2 X 0.2000 SERVICELEVEL)
Calculated Max/ROQ = 1
Final Min/ROP = 1
Final Max/ROQ = 1
End Help
Inquiry
Cancel
The Systems House
Ready
7/31/2014 12:05:47 AM
CAP
NUM
SCRL


TSH-USMED-TIMESHARE - [timeshare.tshinc.com-USMED-IM.POGEN.CREATE010$1]
File
Edit
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Application
Shortcuts
Terminal
MDS Menu
Find
Tasks
Charts
Key Indicators
SELECTED P
Warehouse
Vendor
Pro
13
14
15
16
17
18
SALES
Line# to A
St Status
Help
The Systems Hous
GENERAL HELP
Inventory Management Log Information :
Demand Update for BSN-6022
Run on 07/22/14
Run at 10:20:46am
Product is Non Seasonal.
Current Sales Subtotal :3
Demand Based on 5 months.
With the Months weighted as follows:
Current Month 5, 1st Previous 4, 2nd Previous 3, 3rd Previous 2, 4th Previous 1,
Our weighted sample will be based on: 15 months.
Calculated Demand = 3 / 15 months.
Calculated Demand = 0
Final Demand = 0
ROP Update for Product BSN-6022
Run on 07/22/14
Run at 10:30:03am
Administrative Lead Time = 0.5 months.
Purchasing Lead Time = 0.4 months from Product Detail Cumulative Average
Service Level = -9900 for Product Ranking D
ROP Method is 3 MIN/MAX Method from Warehouse 001 Maintenance.
Demand = 0 from Product Calculated Demand.
Min/ROP Months set to 0.5 of Demand in Inv Mgmt Param Maint.
Max/ROQ Months set to 1.0 of Demand in Inv Mgmt Param Maint.
Adjusted Min/ROP = 0 Demand X 0.5 MinMonths = 0
Calculated Min/ROP = 0 + (0 X -0.9900 SERVICELEVEL)
Calculated Min/ROP = 0
Adjusted Max/ROQ = 0 Demand X 1.0 MaxMonths = 0
Calculated Max/ROQ = 0 + (0 X -0.9900 SERVICELEVEL)
Calculated Max/ROQ = 0
Product Override Min/ROP = 2
Final Min/ROP = 2
Product Override Max/ROQ = 4
Final Max/ROQ = 4
End Help
Inquiry
Cancel

MDS Automation

- MDS Triggers are a new subsystem that can be used to automatically call a program and perform an action whenever a record is changed in a specified MDS Table.

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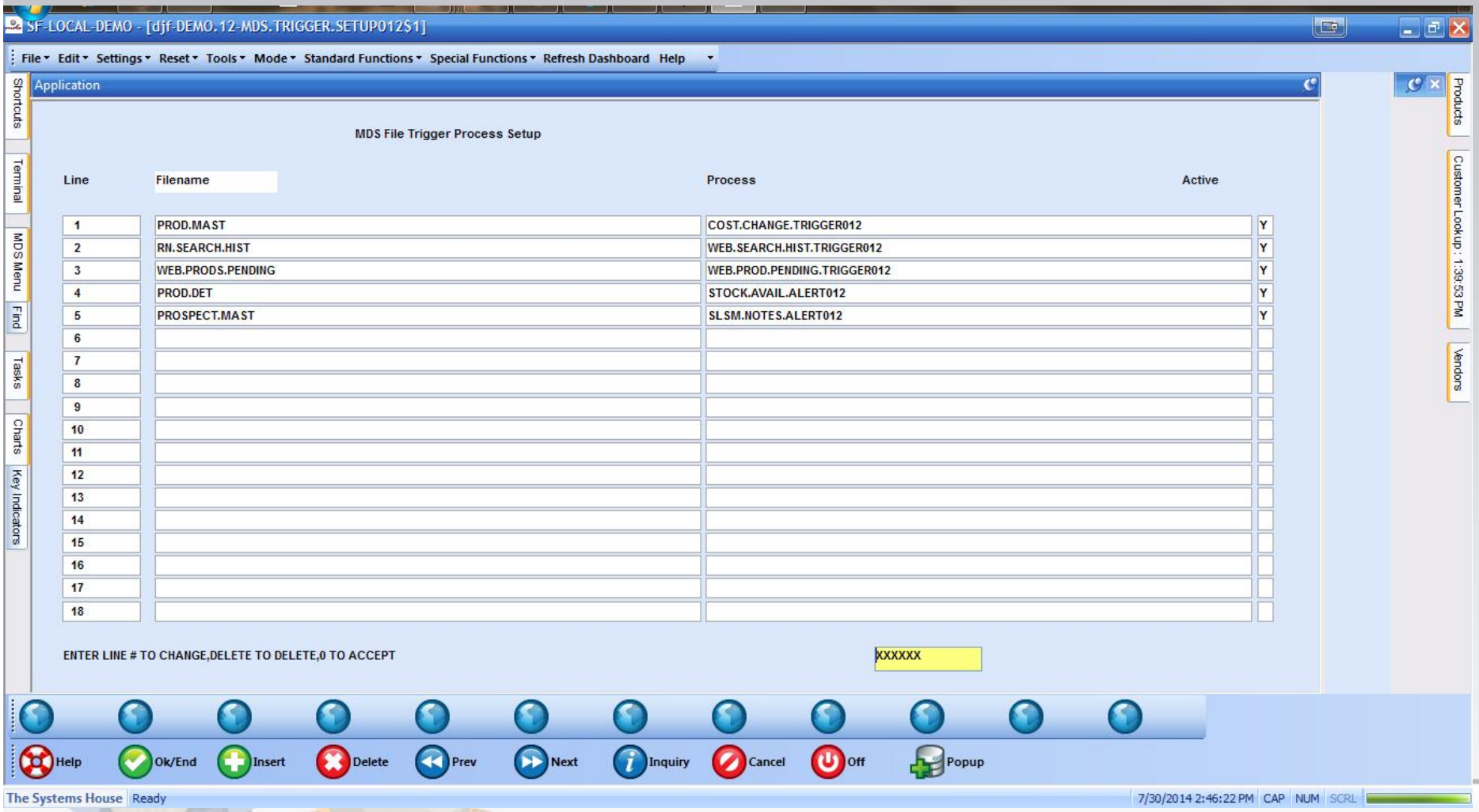
MDS Automation



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MDS Automation

- Cost Change Trigger – updates GL with cost changes to track item cost changes.
- Web Search Trigger – Emails sales/customer service when a web customer searches for a particular product or term.
- Web Prods pending – Sends changes to the website in real-time when items are updated.
- Stock alert – when an item that was on backorder, or a new item is now available to sell, it emails the customer/salesman to alert them it's now available , if on an order it will ship if not they can call and order it.
- Salesman notes alert – sends a report to a salesman/ sales manager about activity for the day/time period.
- Salesman Follow-up Reminder – sends email to remind salesman about overdue follow-up dates.

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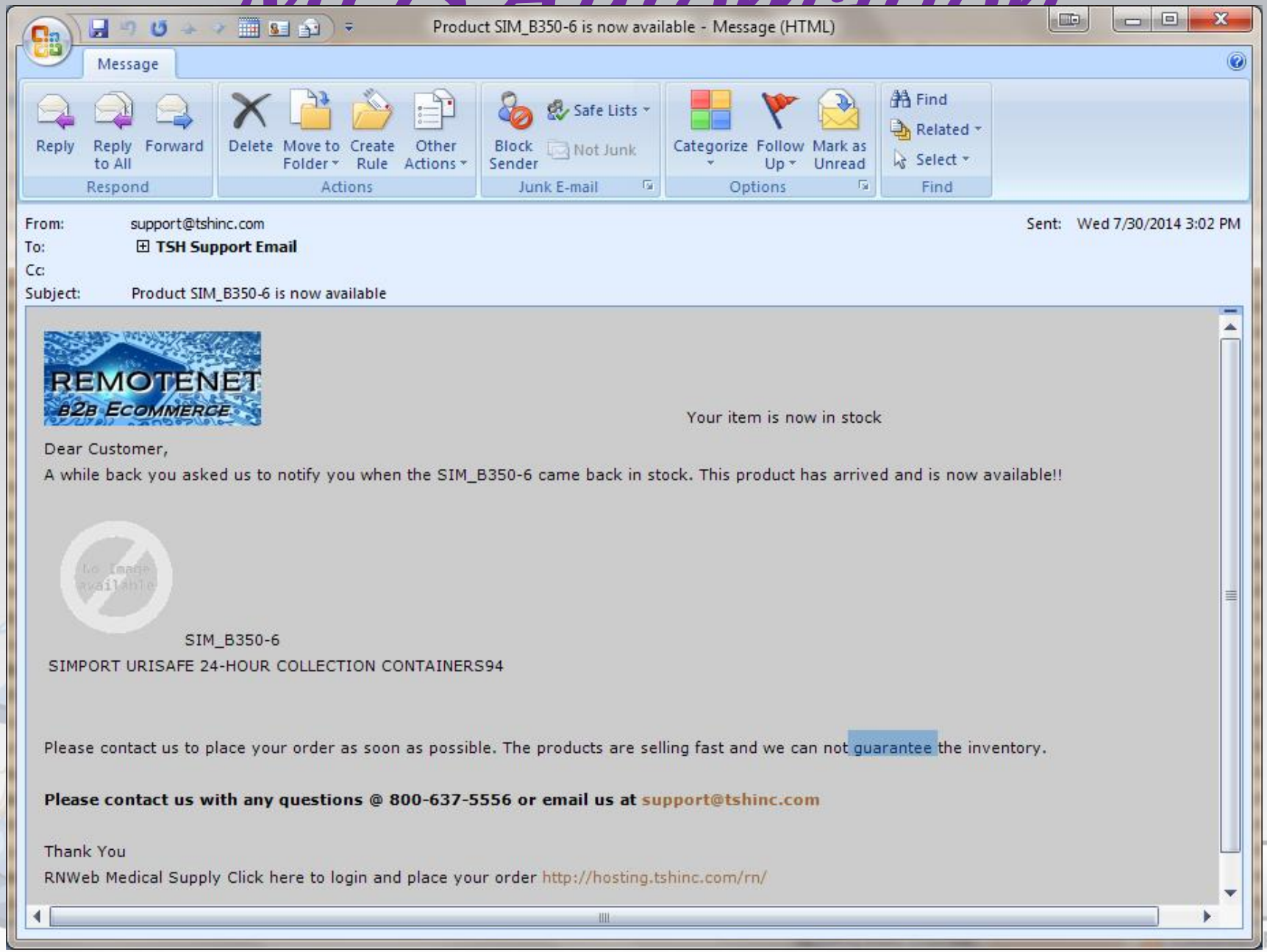
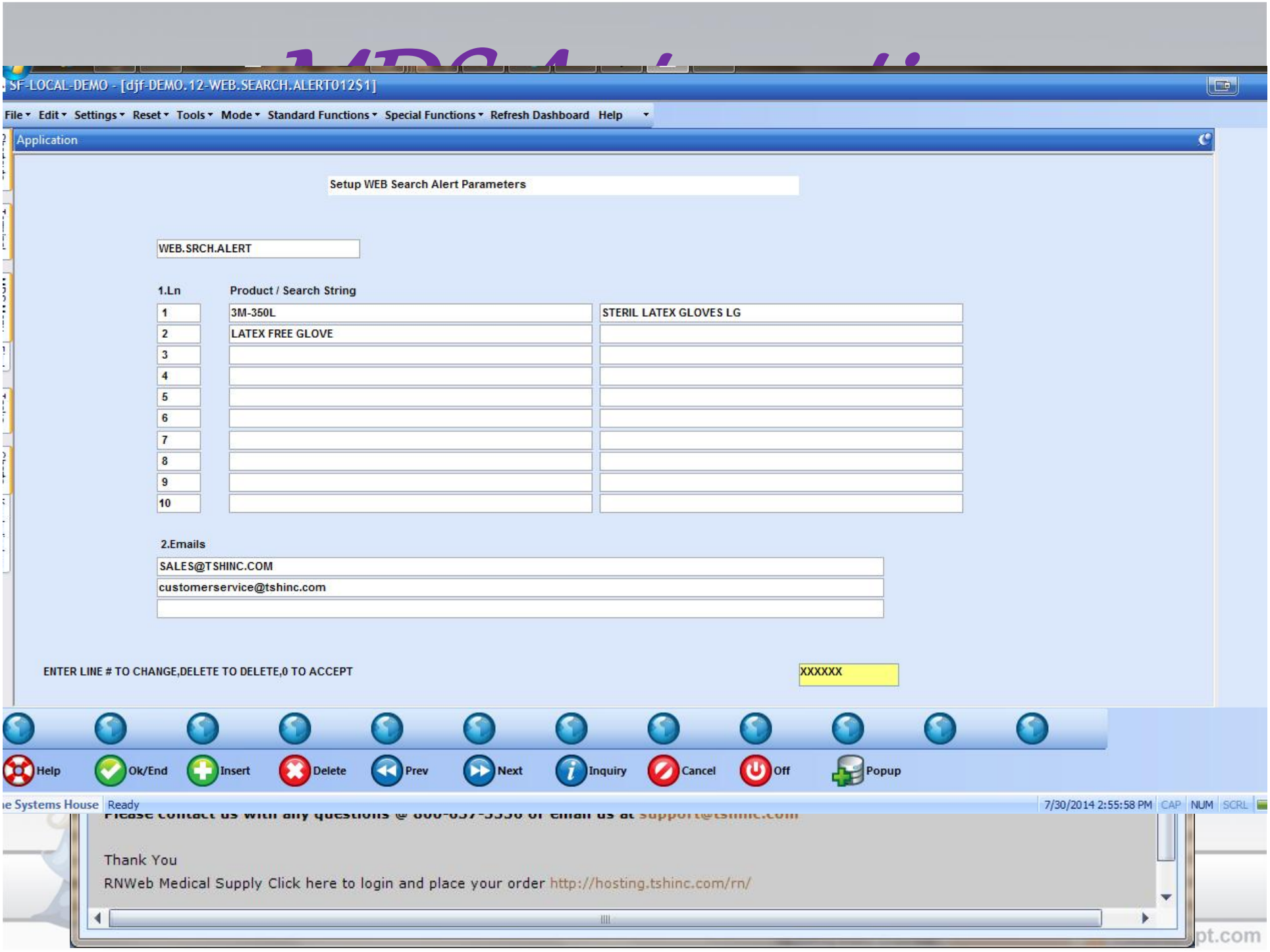
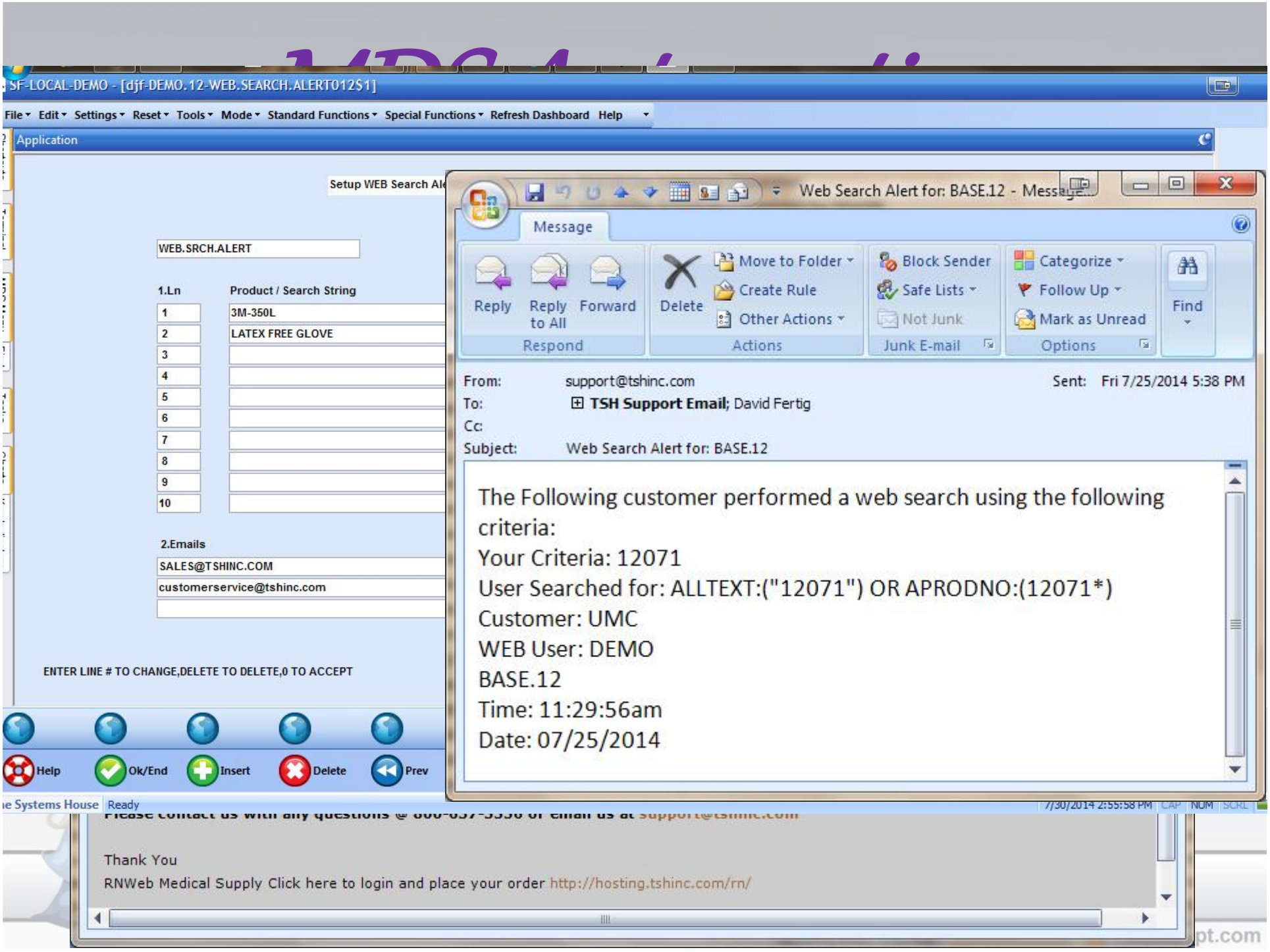
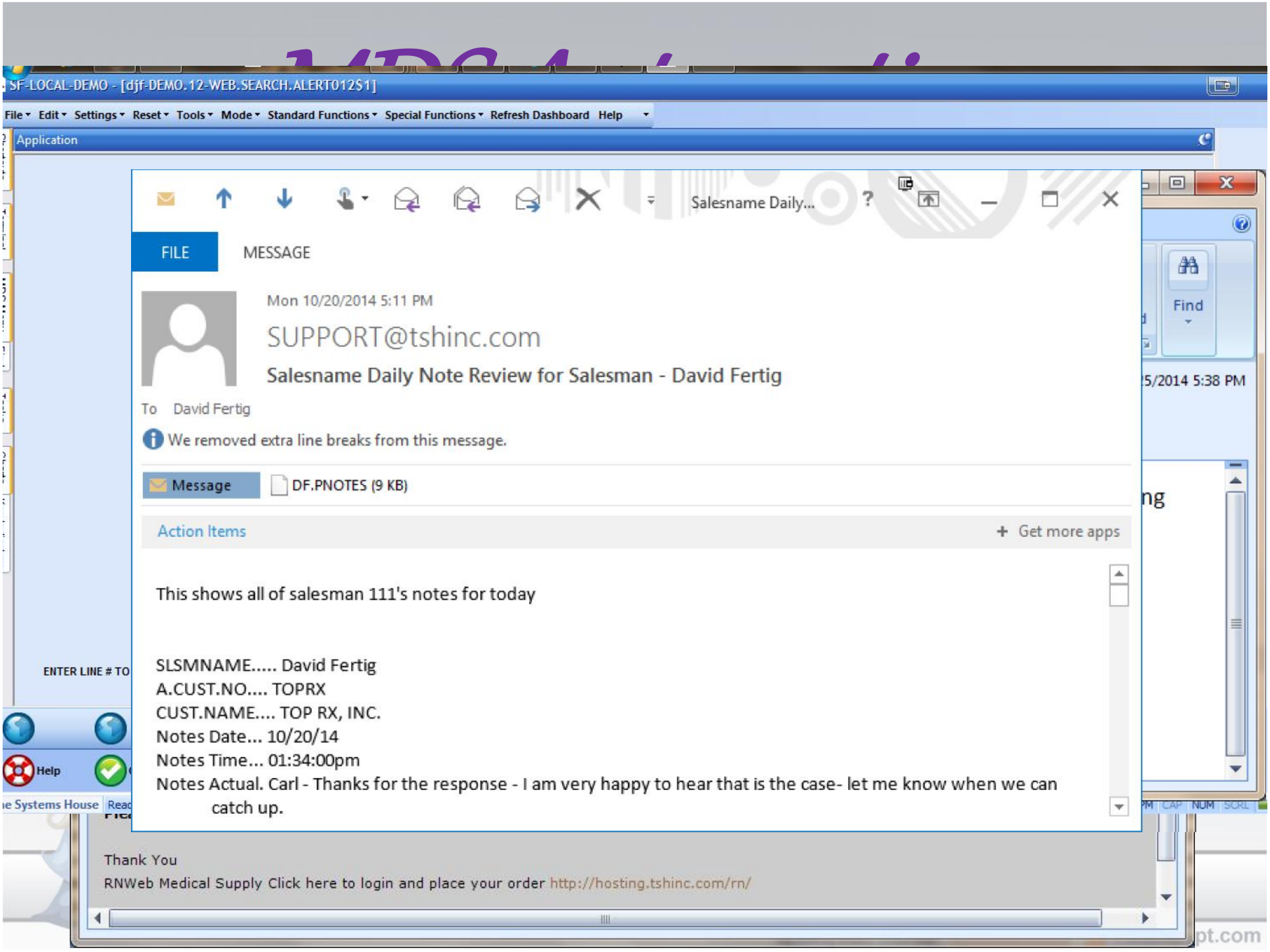
MDS Automation




SF-LOCAL-DEMO - [djf-DEMO.12-WEB.SEARCH.ALERT012$1]
File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help
Application
Setup WEB Search Alert Parameters
WEB.SRCH.ALERT
1.Ln
Product / Search String
1 3M-350L STERIL LATEX GLOVES LG
2 LATEX FREE GLOVE
3
4
5
6
7
8
9
10
2.Emails
SALES@TSHINC.COM
customerservice@tshinc.com
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT
XXXXXX
Help
Ok/End
Insert
Delete
Prev
Next
Inquiry
Cancel
Off
Popup
Ready
7/30/2014 2:55:58 PM
CAP
NUM
SCRL
Thank You
RNWeb Medical Supply Click here to login and place your order http://hosting.tshinc.com/rn/


SF-LOCAL-DEMO - [djf-DEMO.12-WEB.SEARCH.ALERT012$1]
File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help
Application
Setup WEB Search Al
WEB.SRCH.ALERT
1.Ln
Product / Search String
1 3M-350L
2 LATEX FREE GLOVE
3
4
5
6
7
8
9
10
2.Emails
SALES@TSHINC.COM
customerservice@tshinc.com
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT
Help
Ok/End
Insert
Delete
Prev
Web Search Alert for: BASE.12 - Message
Message
Reply
Reply to All
Forward
Delete
Move to Folder
Create Rule
Other Actions
Block Sender
Safe Lists
Not Junk
Categorize
Follow Up
Mark as Unread
Find
Respond
Actions
Junk E-mail
Options
From: support@tshinc.com
Sent: Fri 7/25/2014 5:38 PM
To: TSH Support Email; David Fertig
Cc:
Subject: Web Search Alert for: BASE.12
The Following customer performed a web search using the following criteria:
Your Criteria: 12071
User Searched for: ALLTEXT:("12071") OR APRODNO:(12071*)
Customer: UMC
WEB User: DEMO
BASE.12
Time: 11:29:56am
Date: 07/25/2014
Ready
Thank You
RNWeb Medical Supply Click here to login and place your order http://hosting.tshinc.com/rn/


SF-LOCAL-DEMO - [djf-DEMO.12-WEB.SEARCH.ALERT012$1]
File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help
Application
Salesname Daily...
FILE
MESSAGE
Mon 10/20/2014 5:11 PM
SUPPORT@tshinc.com
Salesname Daily Note Review for Salesman - David Fertig
To David Fertig
We removed extra line breaks from this message.
Message
DF.PNOTES (9 KB)
Action Items
Get more apps
This shows all of salesman 111's notes for today
SLSMNAME..... David Fertig
A.CUST.NO.... TOPRX
CUST.NAME.... TOP RX, INC.
Notes Date... 10/20/14
Notes Time... 01:34:00pm
Notes Actual. Carl - Thanks for the response - I am very happy to hear that is the case- let me know when we can
catch up.
Find
ENTER LINE # TO
Help
Thank You
RNWeb Medical Supply Click here to login and place your order http://hosting.tshinc.com/rn/

MDS Automation

- Create a QC Audit function that will track updates to any MDS File using MDS Triggers and create QC tasks based on number or percentage of updates.

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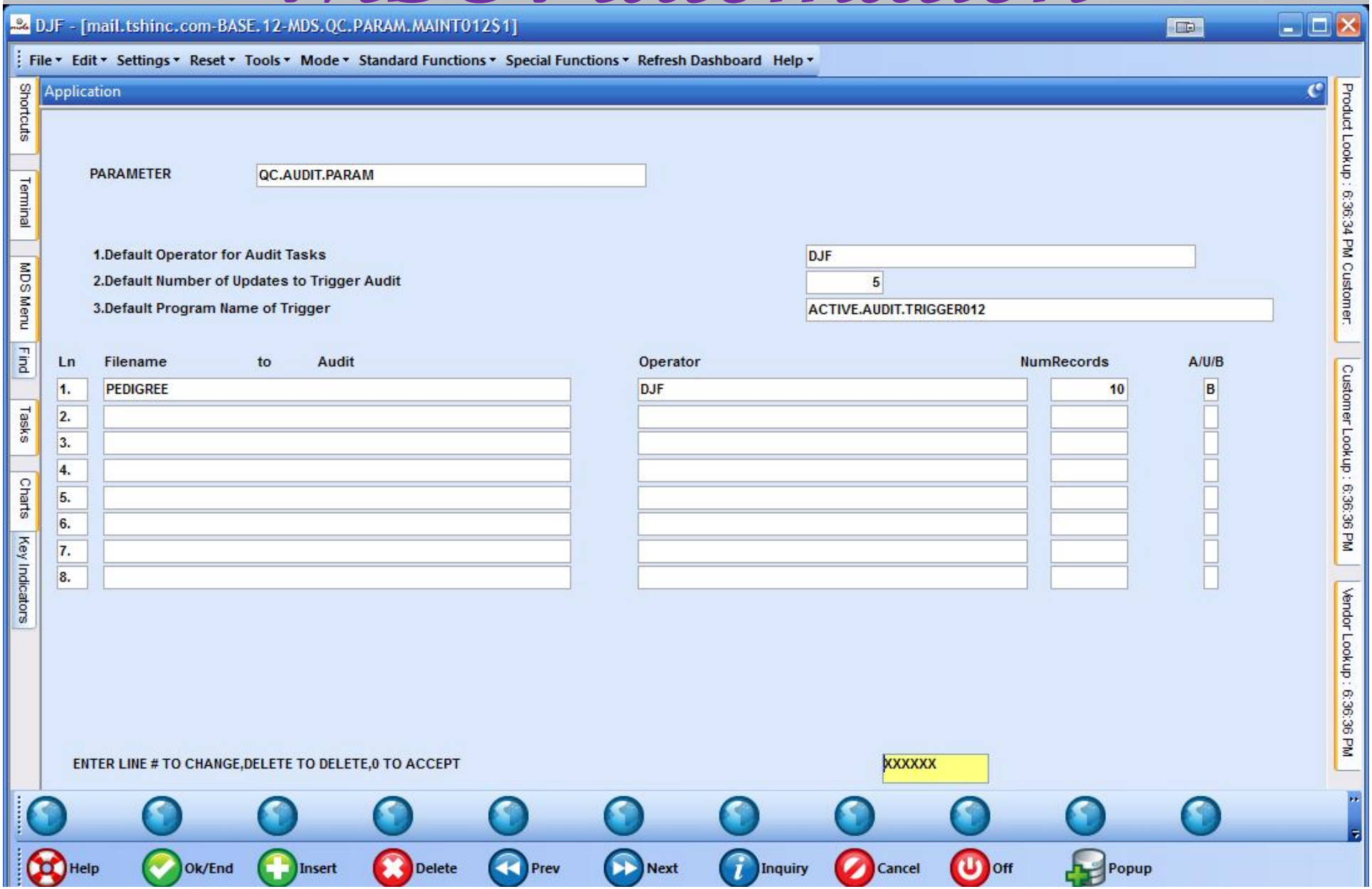
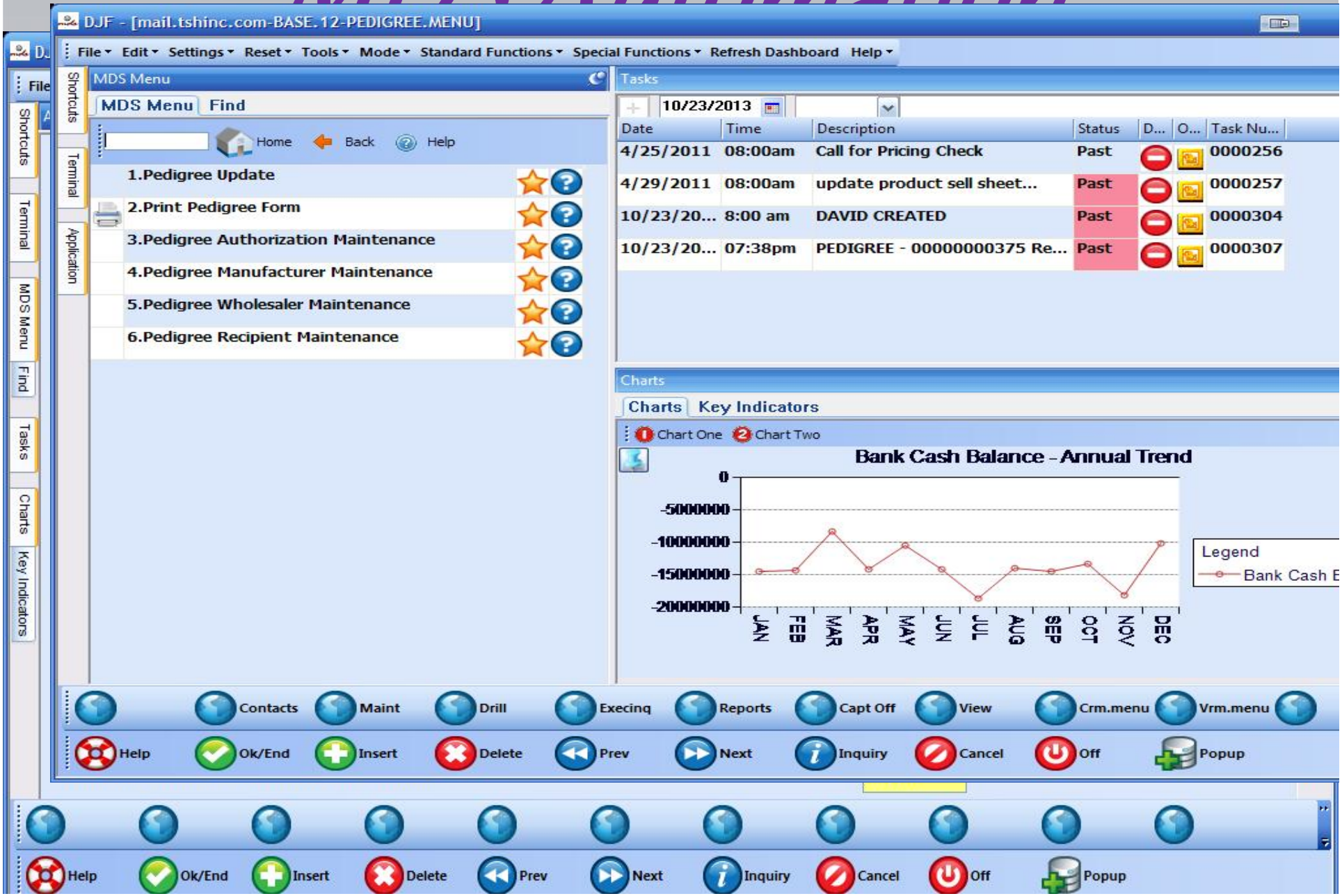
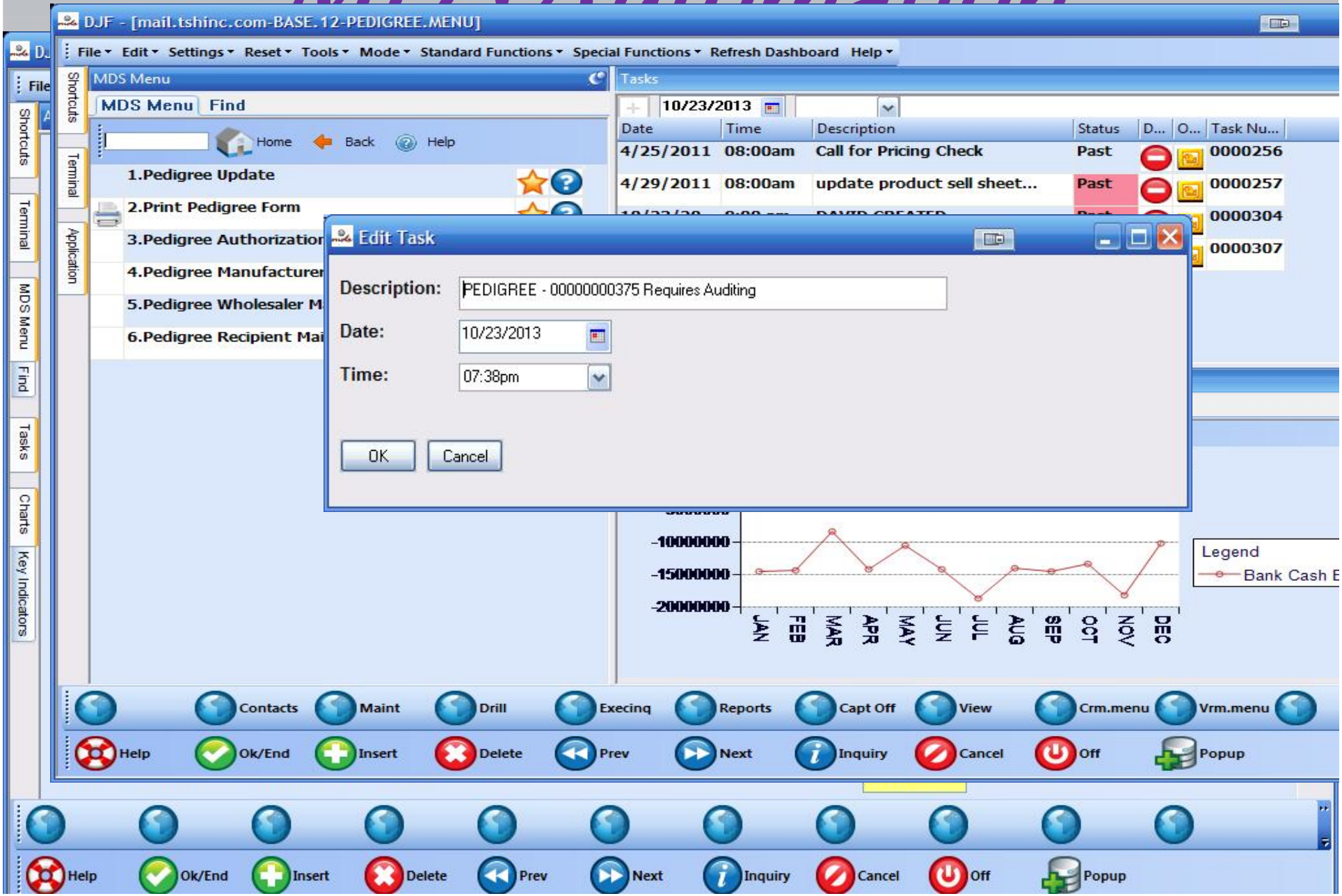
MDS Automation



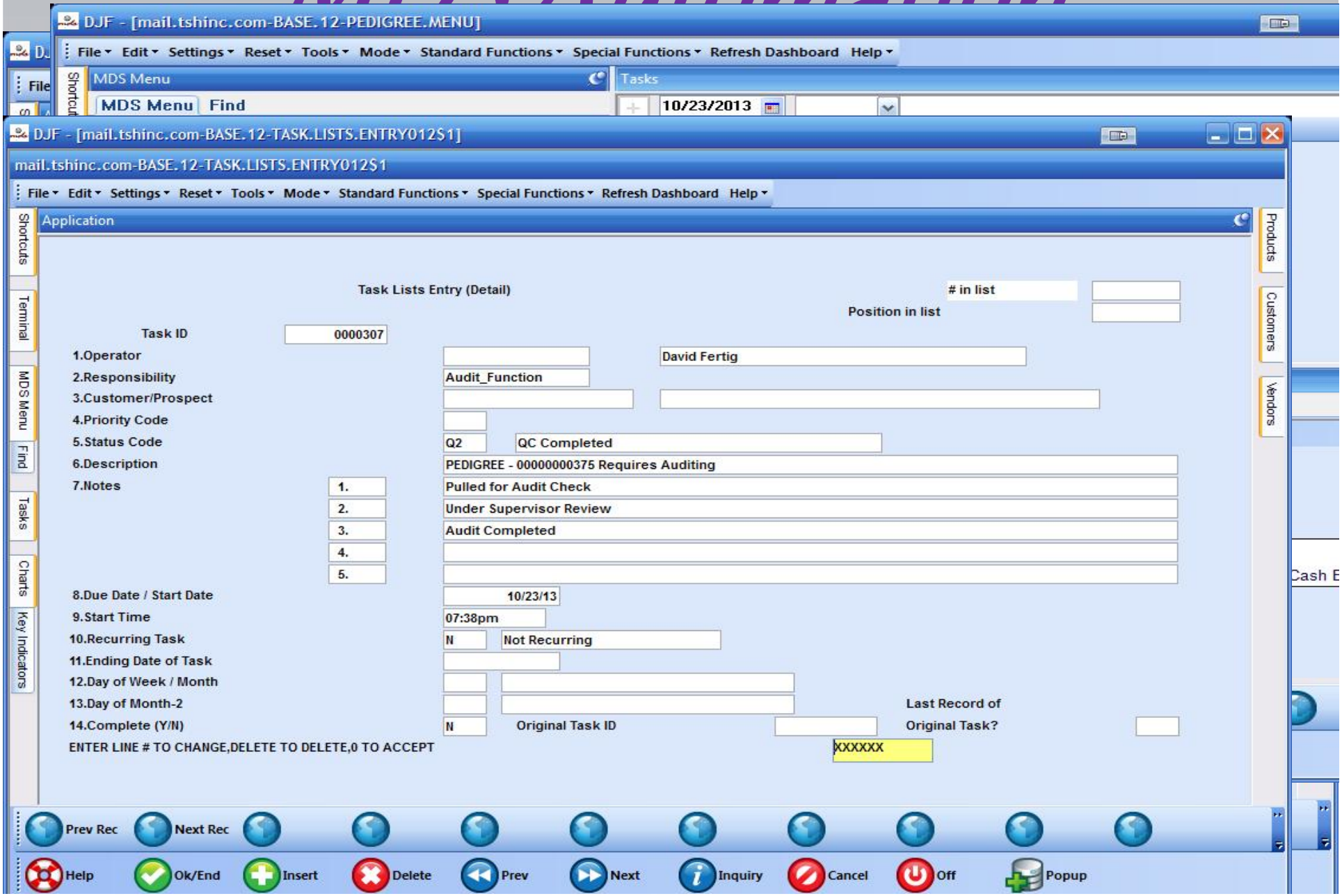
MDS Automation



MDS Automation



MDS Automation



MDS Beautification

- Modify the Base Form processes to allow for HTML type forms to be used.

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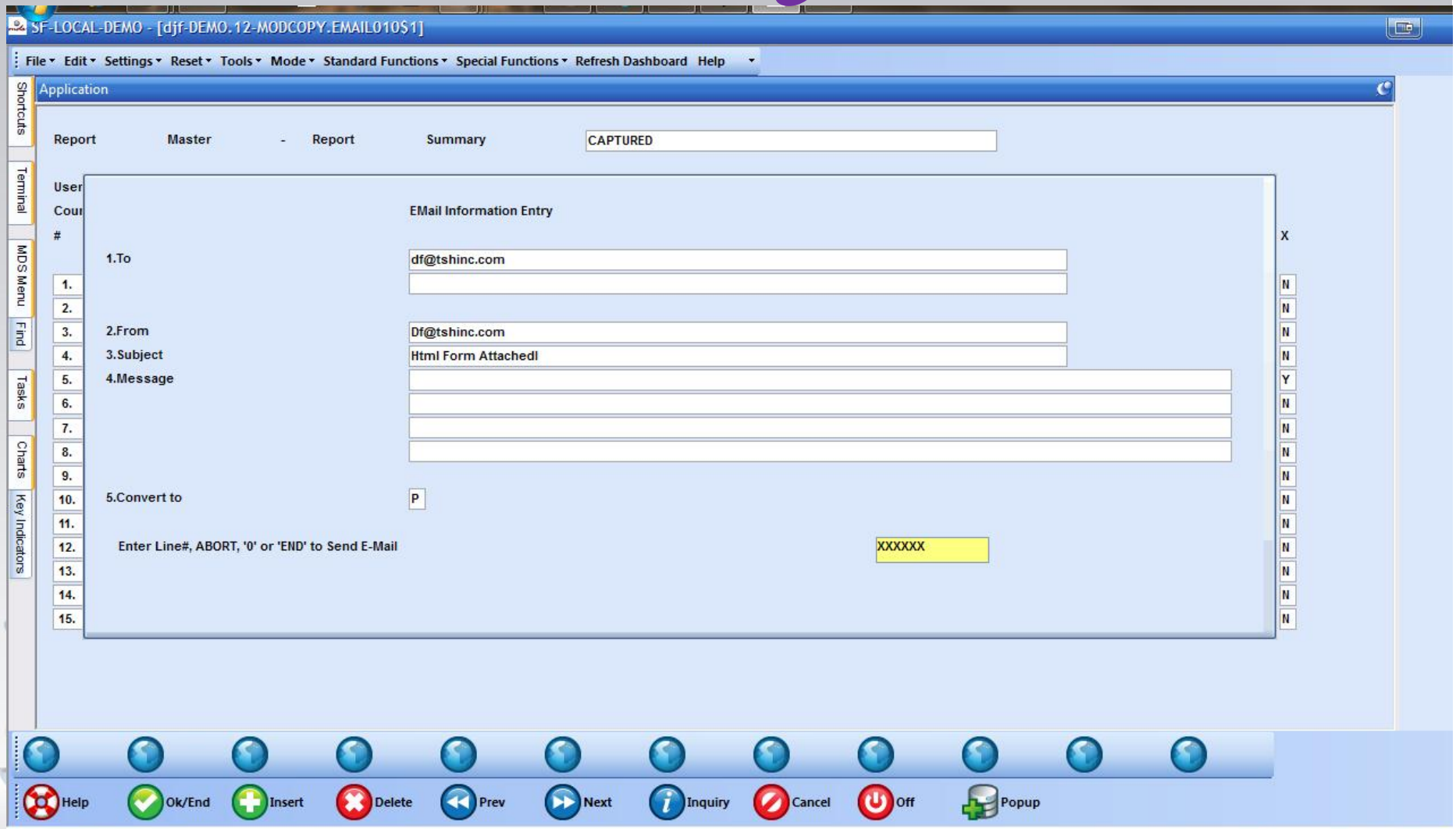
MDS Beautification



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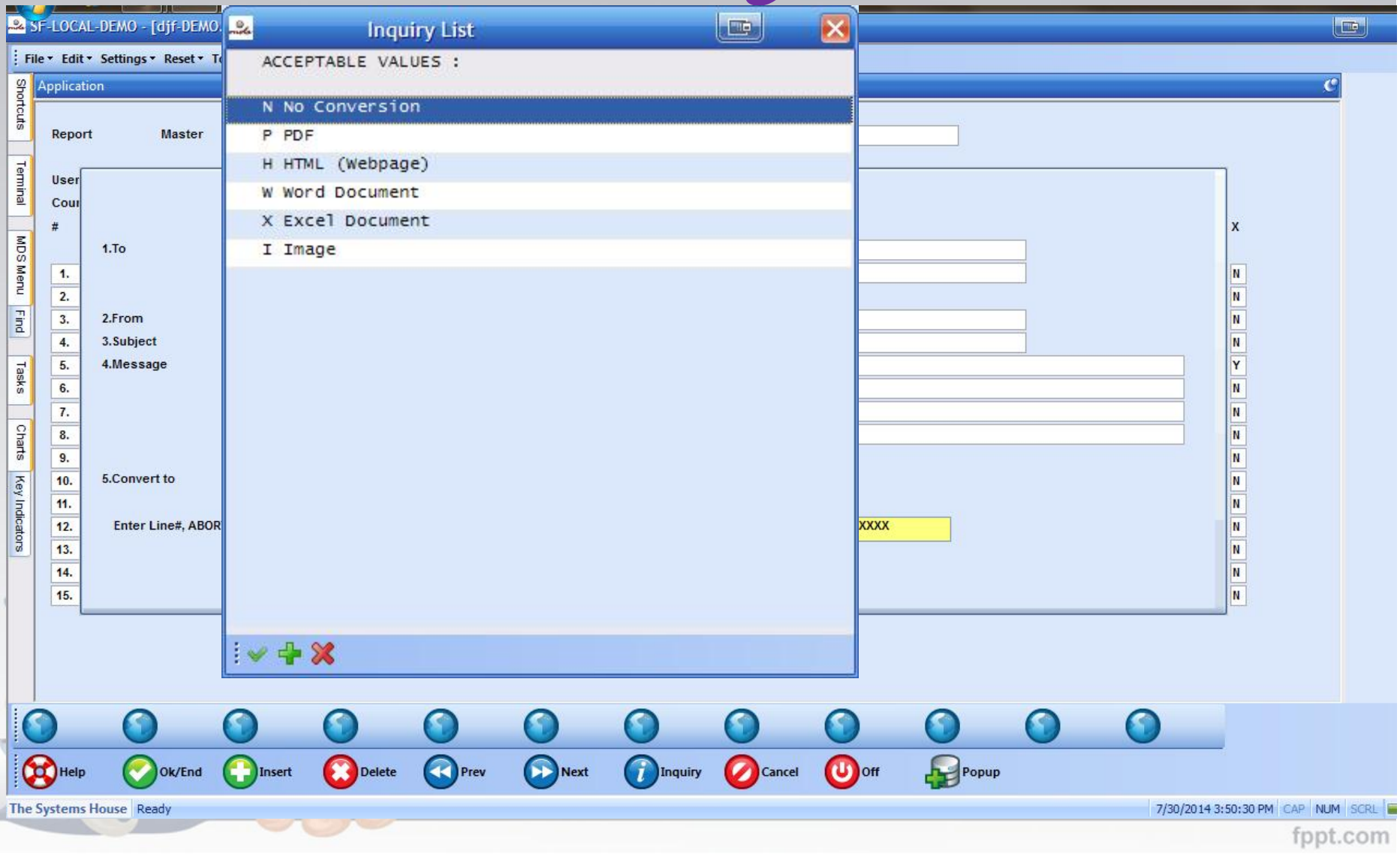
MDS Beautification



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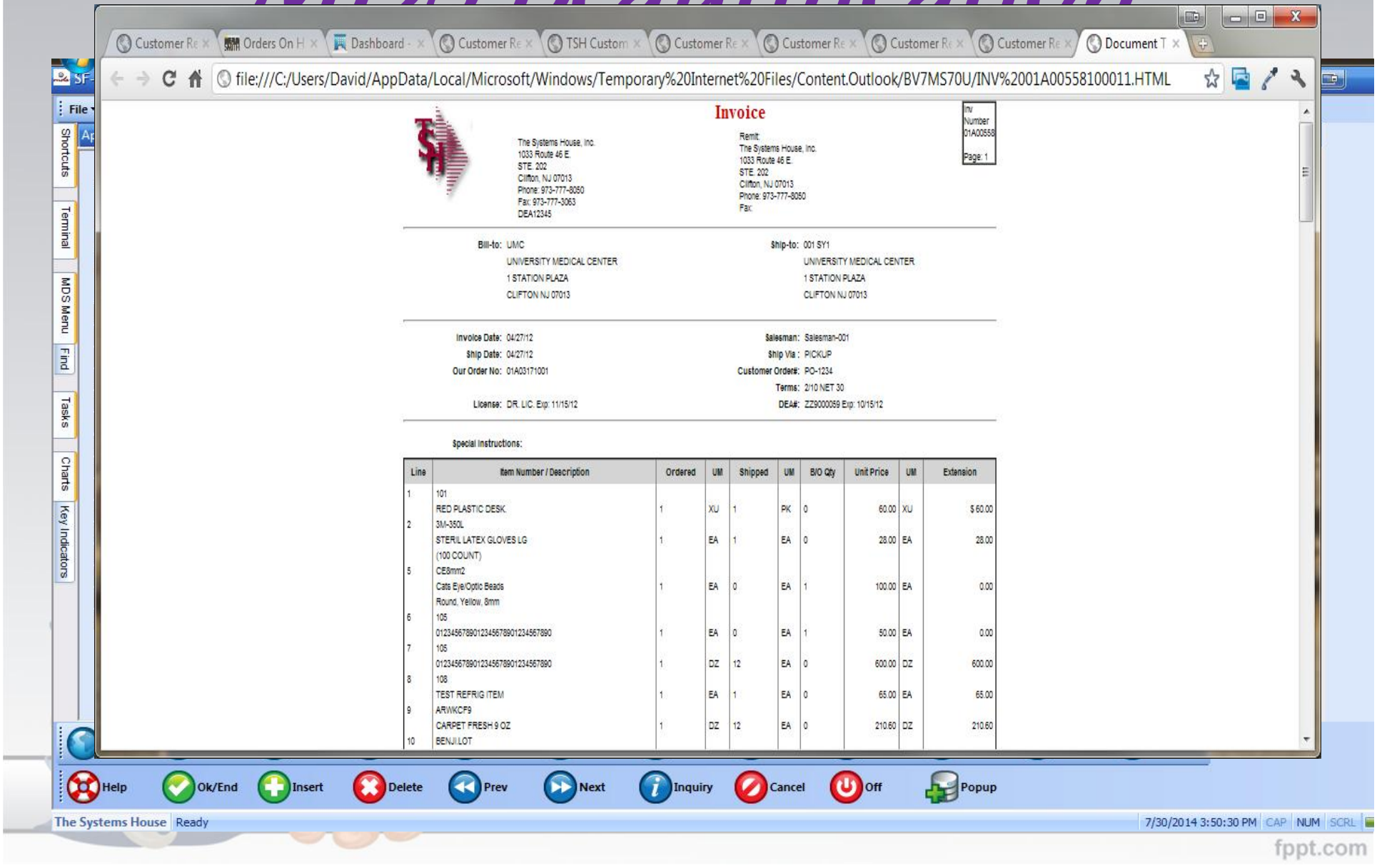
MDS Beautification



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MDS Multichannel Communication

- Prospect Email Blast Enhancement
- Add a Library of Prebuilt templates to choose for blast email
- Add option for Campaign ID’s to track emails and convert to sales using special discount codes or tracking information

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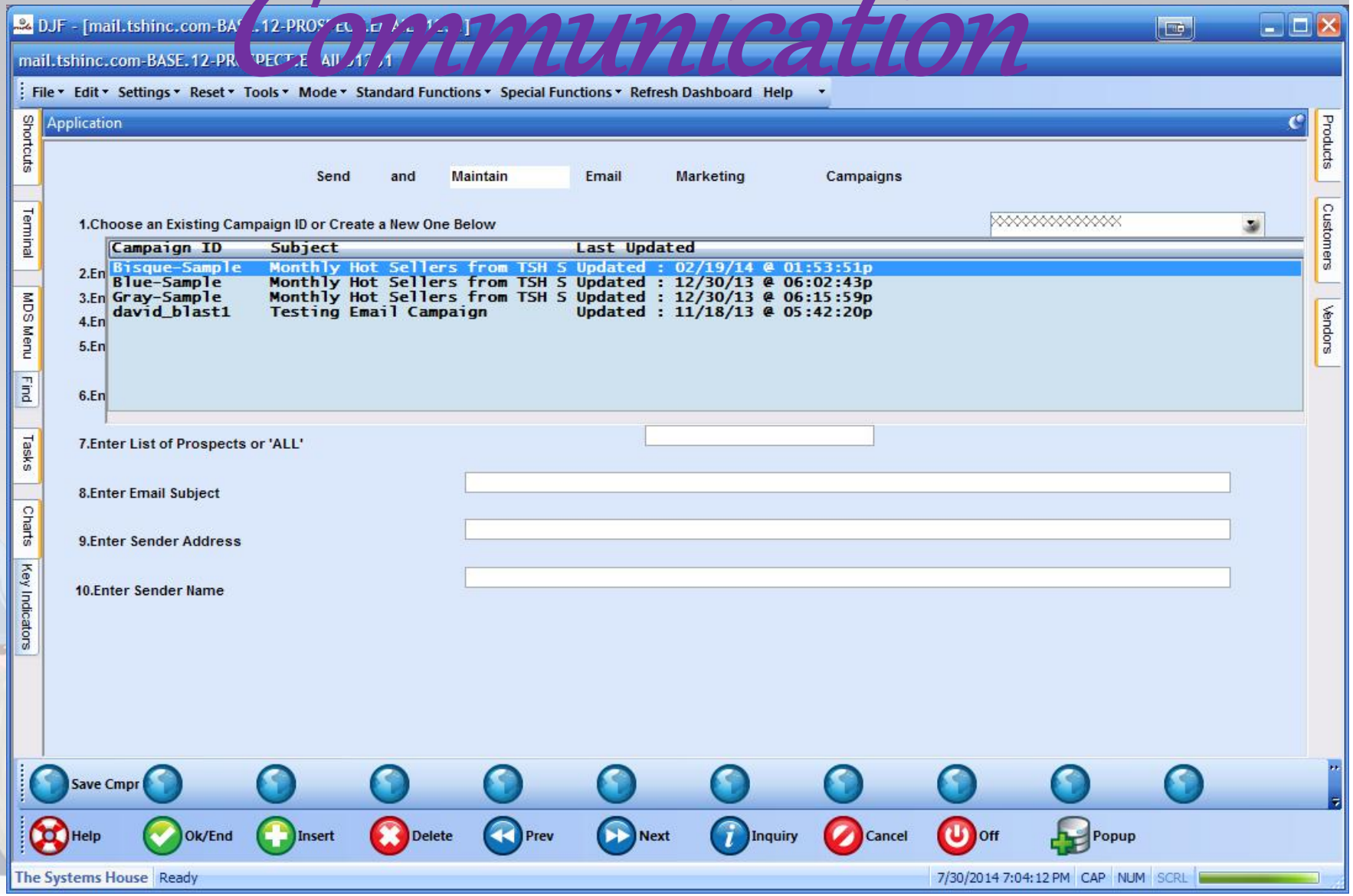
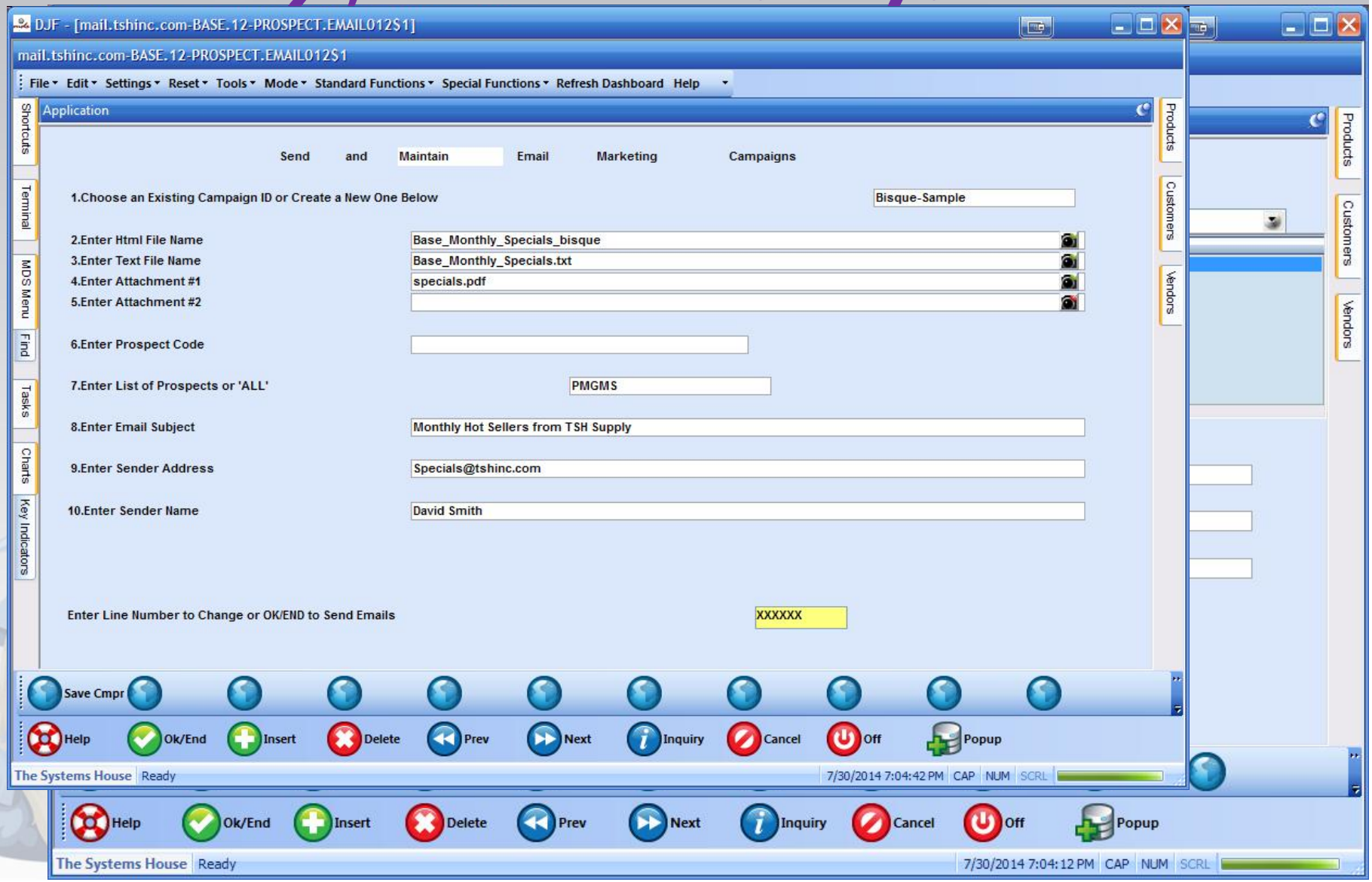
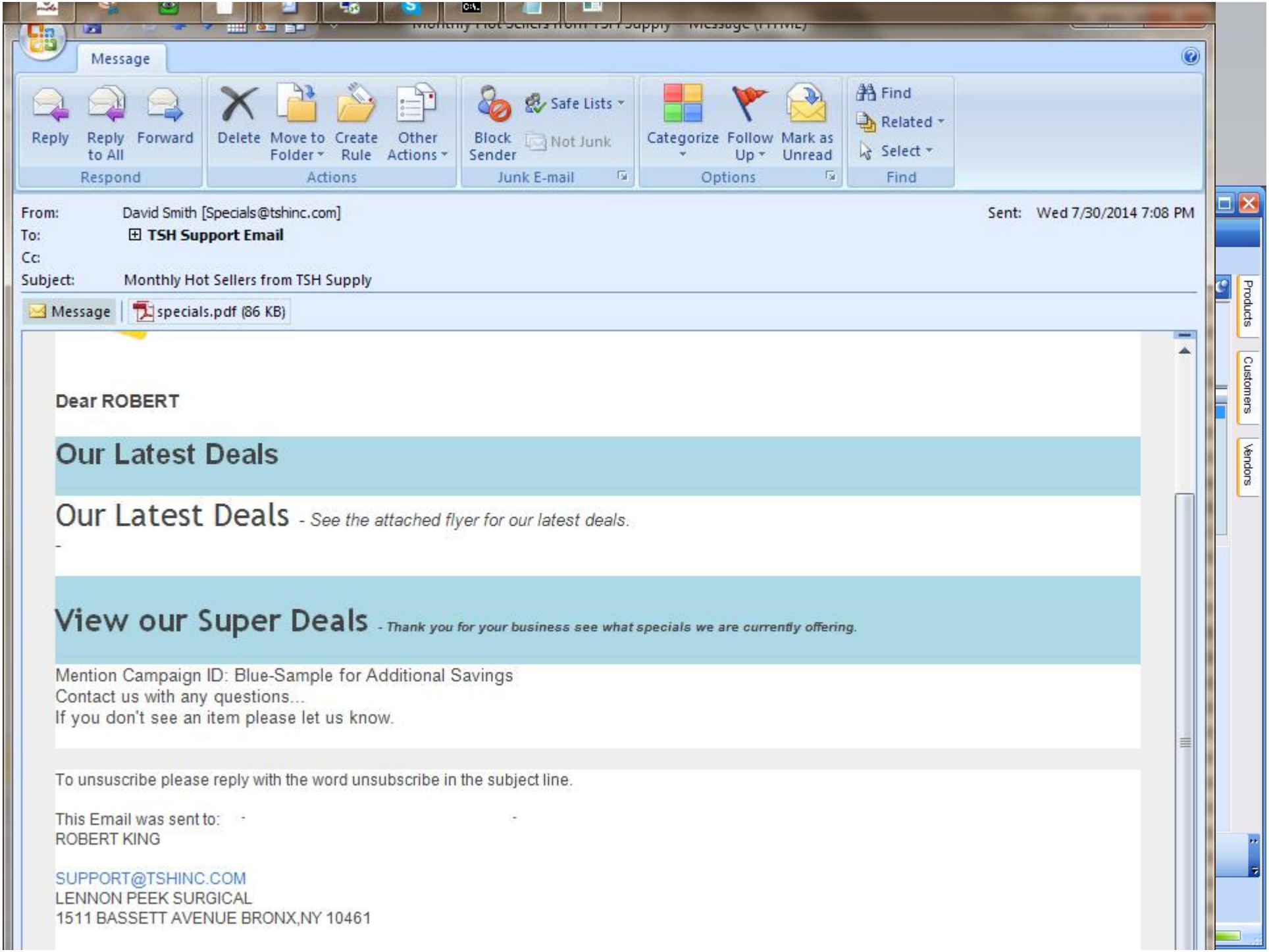
MDS Multichannel Communication

-
-
-



MDS Multichannel




Message
Reply
Reply to All
Forward
Delete
Move to Folder
Create Rule
Other Actions
Respond
Actions
Block Sender
Safe Lists
Not Junk
Junk E-mail
Categorize
Follow Up
Mark as Unread
Options
Find
Related
Select
Find
From: David Smith [Specials@tshinc.com]
Sent: Wed 7/30/2014 7:08 PM
To: TSH Support Email
Cc:
Subject: Monthly Hot Sellers from TSH Supply
Message
specials.pdf (86 KB)
Dear ROBERT
Our Latest Deals
Our Latest Deals - See the attached flyer for our latest deals.
View our Super Deals - Thank you for your business see what specials we are currently offering.
Mention Campaign ID: Blue-Sample for Additional Savings
Contact us with any questions...
If you don't see an item please let us know.
To unsuscribe please reply with the word unsubscribe in the subject line.
This Email was sent to:
ROBERT KING
SUPPORT@TSHINC.COM
LENNON PEEK SURGICAL
1511 BASSETT AVENUE BRONX,NY 10461
Products
Customers
Vendors

MDS Multichannel Communication

- Add Ability to customize messages on all emails from MDS and add form name as well as document number to all emails

Confirmation	Return Authorization	Shipment
Credit Application	Release Label	Work Order
Invoice	Statement	Shipment
Location Label	Service Work Order	Packing Slip
Manifest	Vendor Return	Vendor Return
Monthly Specials	Transfer	Purchase Order
Picking Ticket	Purchase Order	Vendor Return
Pack Label	Receipt	Picking Ticket
Pedigree	Voided Invoice	
Quote	Invoice Void	
Pick Label	Credit Memo	
Purchase Order	Credit Void	
Product Label	Consignment	

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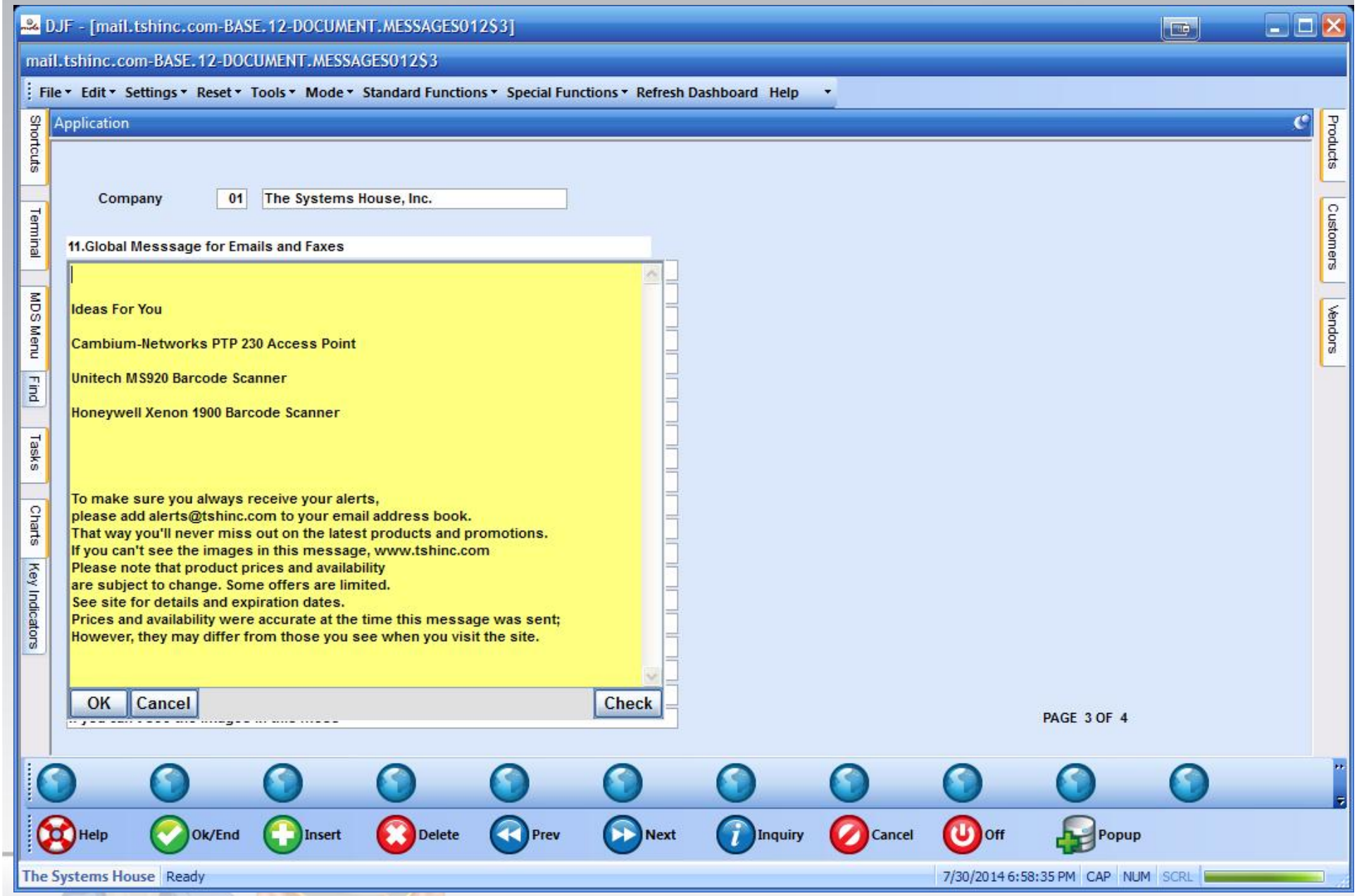
MDS Multichannel



Product Label Consignment

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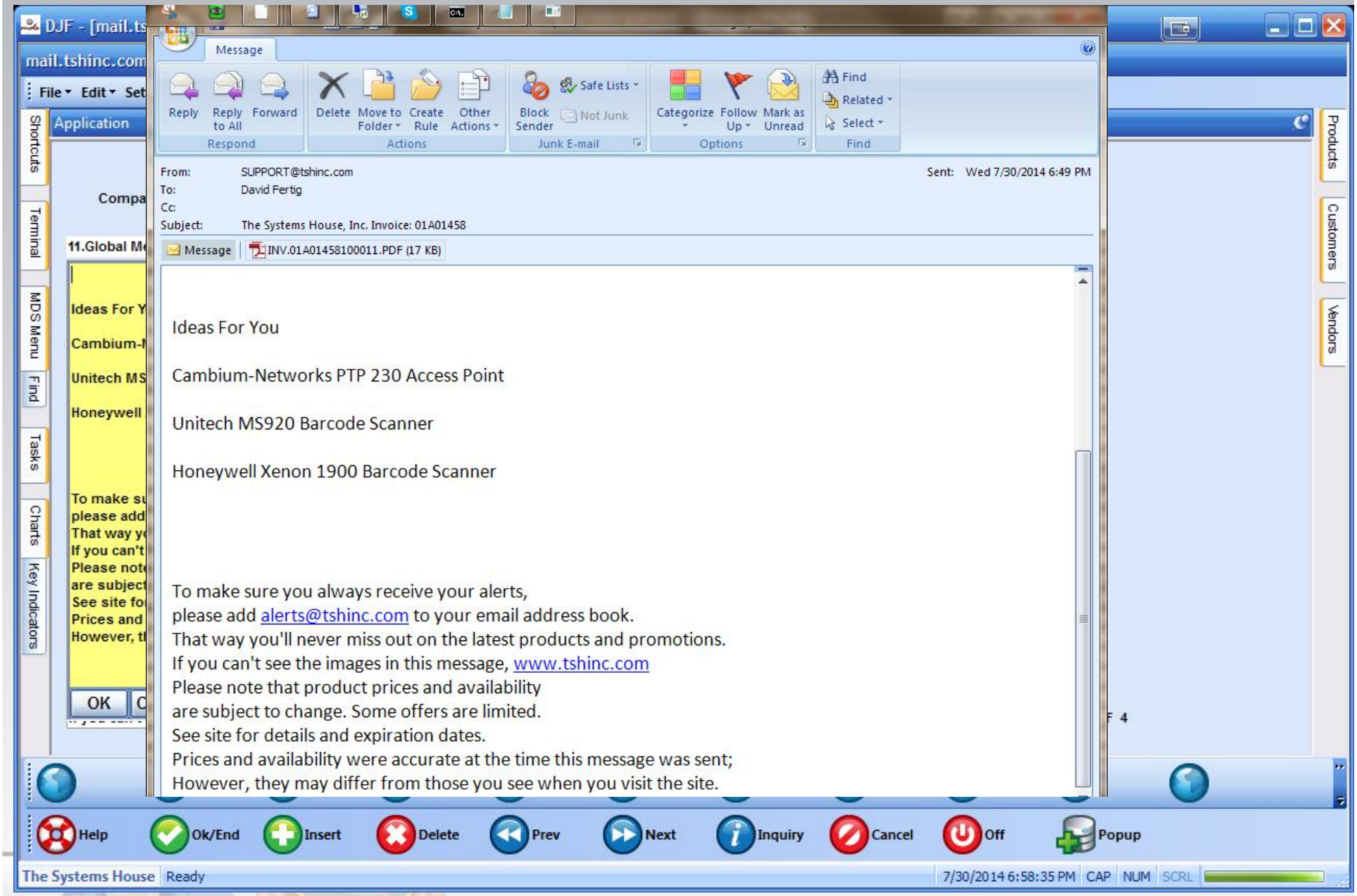
MDS Multichannel



Product Label Consignment

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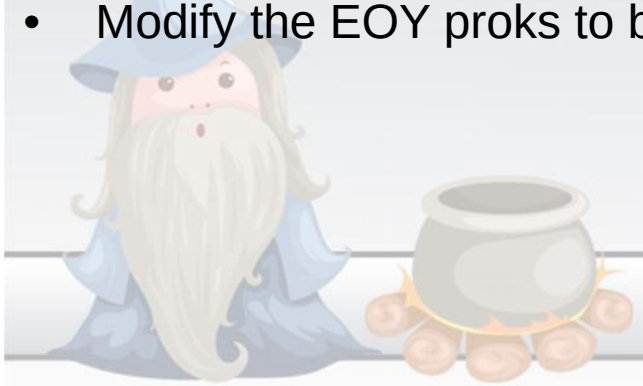
New Capabilities Added

EDI

- EDI 832 Enhancements for adds/deletes/changes and drug type
- EDI 846 Enhancements for inventory
- Create a new EDI Partner Maintenance which allows you to set up incoming / outgoing EDI folders by EDI Trading Partner.

General

- Form Changes: Add a global message to all forms emails/faxes
- Ar Specific fields as allowable for customer lookup –
- Create an MDS Triggers system that can be used to automatically call a program and perform an action whenever a record is changed in a specified MDS Table.
- Modify the Specials/Template creation from Sales.4 : Add option to select by product class
- Prospect EMail Blast Mods
- Modify the EOM and EOY processes to lock users out of the system the same way that EOD currently does.
- Modify the EOY proks to be Scheduler Jobs instead of proks.



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Inquiry

- Modify the Daily Balance Inventory Update to not skip numbers that are 0 or less.
- Modify the Open Order Detail Inquiry to allow entry of a "P" and a Pro Forma # and have it use the PO.ORD.XREF to get the resulting Order# and display it.
- Add a new dictionary to PROD.MAST_MDS.ODBC which shows Availability without including ON PO.
- Add DAILY.BAL.HIST to ODBC and add trending KPI's - create a set of kpi to compare the current Kpi for sales dollars –
- Add Graphs and Charts of Trends Modify
- . Modify the Inventory History by Product Inquiry to speed it up.
- Change color on the items on the Executive Inquiry that are calculated on line,
- Modify the Location lookup in Stock Status to show the Receipt Date
- Add a button on the Stock Status Inquiry that goes to the Lot Inventory Inquiry.
- Add the Customer Name to display on the Product Lookup when a customer.

Inventory

- Create a Lot Tracking Report to select a Product, Lot , Serial or Whse and a Date Range
- Modify Credit Memo Maintenance to have an option to choose the default location based on Primary or Bulk location.
- Modify Warehouse Maintenance to maintain the option credit memo location.
- Modify the Purchase Order Generation screen to show ROPS with Manual Overrides in a different color.

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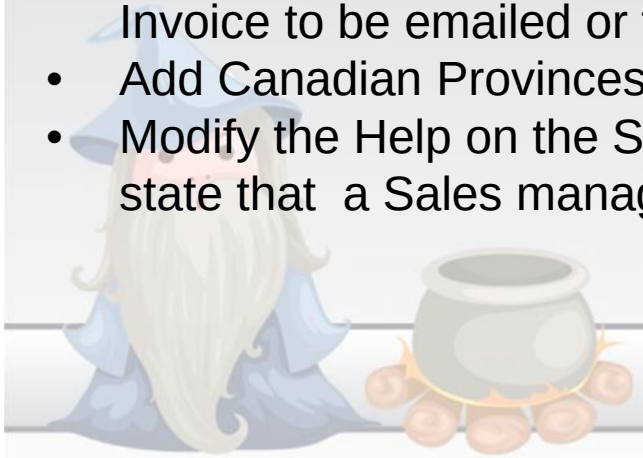
Maintenances

- Add new field to customer master for Website ID
- Create a QC Audit function that will track updates to any MDS File using MDS Triggers and create QC tasks based on number or percentage of updates.
- Add the ability to copy a WEB Customer record.
- Modify the Customer Contract Inquiry to let you enter a Customer OR a Customer and a Shipto.
- Increase customer, shipto and vendor name to 35x. Change all forms to have smaller font to handle the larger field.
- Modify all forms to increase the size of the comments to the size that can be entered. This will cause the comment to print over the line.
- Modify the Contract Detail file import to load the UM Price matrix fields
- Update Unit of Measure Maintenance to allow for UN Recommendation 20 Standard ID - this is a 3 digit alpha code slightly different then the ansi tables Change the Help for the Invoice Copies field in Customer Maintenance to say that setting invoice copies to 0 will not print the Invoice in EOD but will still allow the Invoice to be emailed or faxed
- Add Canadian Provinces to the State Code table
- Modify the Help on the Salesman field in Sales Management Call Summary to state that a Sales manager can enter ALL to see Prospects for All Salesmen.



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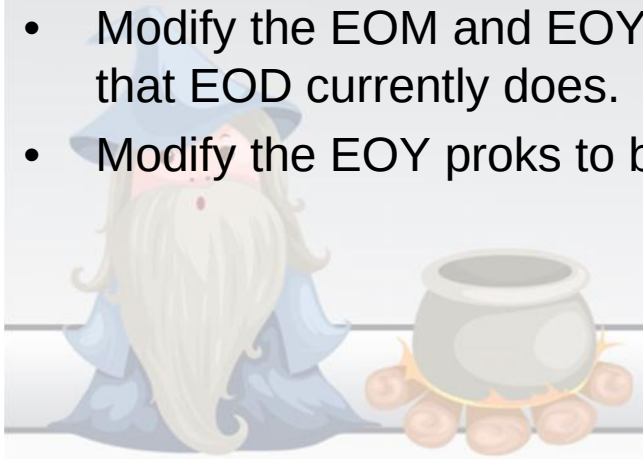
- Modify Warehouse Maintenance to allow for 60 characters in all Email addresses.
- Modify Product Master Maintenance to allow you to set a URL instead of an Image path for the Remotenet image.
- Update Country Code Maintenance to allow for IS0-3166 - 3 Digit Alpha Code and Numeric Code (3 digit) - needed to transmit data.

General

- Form Changes: Add a global message to all forms emails/faxes
- AR Specific fields as allowable for customer lookup –
- Create an MDS Triggers system that can be used to automatically call a program and perform an action whenever a record is changed in a specified MDS Table.
- Modify the Specials/Template creation from Sales.4 : Add option to select by product class
- Prospect Email Blast Modifications
- Modify the EOM and EOY processes to lock users out of the system the same way that EOD currently does.
- Modify the EOY proks to be Scheduler Jobs instead of proks.



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- Create a new function key in OE line input to allow the operator to enter an email address to receive an email when backordered items come into stock.
- Modify the Invoice Print to show a line with the total due based on the Terms discount if paid early.
- Add a new field to Price.1 Maintenance for Price Hold Exempt.
- Add the HCHB interface program to Base.
- Add the overall Order GP% to the Order Entry Line Item screen.
- Modify Customer Deletion to check before Deleting any Price.1 Records that are used as price contracts by any other Customers and give the Operator a warning message.
- Add support for Speedtax to Base in addition to the ESalesTax support.
- Add Picking Alert to MDS Alerts to show what is currently in Pick in the Warehouse.
- Create a new ODBC subroutine dictionary to Calculate Pricing on the fly and display in the new lookup.
- Modify Purchase Order Maintenance to allow you to manually reopen a Drop Ship PO line that has been closed.
- Modify the DEA Transaction Register to show the DEA Form# for PO Receipts as it already does for Shipments.

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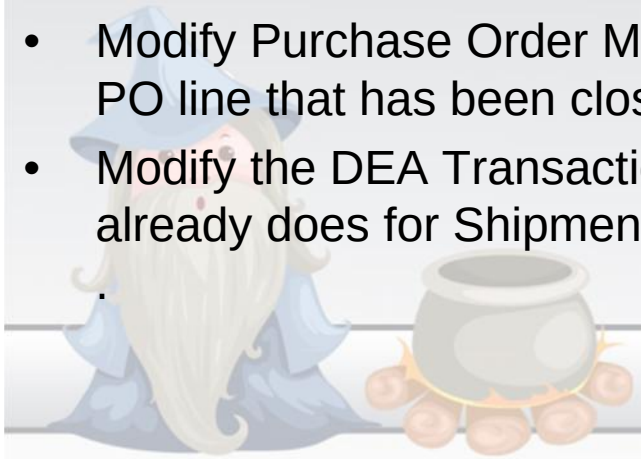

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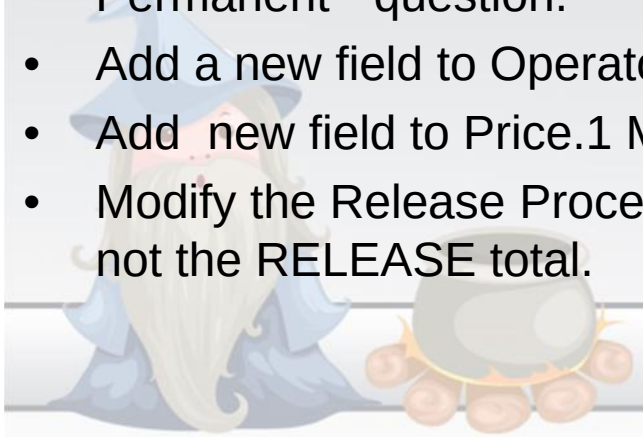
- Modify the Picking Location program so that if the first primary doesn’t have inventory then send it to the next primary
- Add a new parameter for "Check for duplicate orders in the last "X" days“
- Modify the Release Processing Credit Check to not allow shipment if the Credit Hold flag is set to Y on the Customer Master.
- Add XML Order Import for EDI to the EDI Menu
- Add additional Cost fields to the ALL record in Lookup.Options so that they can be added to the Product Lookup.
- Modify the Pedigree Update to allow the Authenticator to have 2 values.
- Add new fields to company record for website and company email address. Add email and website for all forms at top under the document number.
- Add a parameter that specifies whether EDI type orders (WEB, HCHB, standard EDI) should be printed automatically based
- Add an option to Company maint that assigns the default for the "Make this Shipto Permanent " question.
- Add a new field to Operator Maintenance for Reorder Label Queue
- Add new field to Price.1 Maintenance for Taxable.
- Modify the Release Processing Minimum Order check to check the ORDER total and not the RELEASE total.



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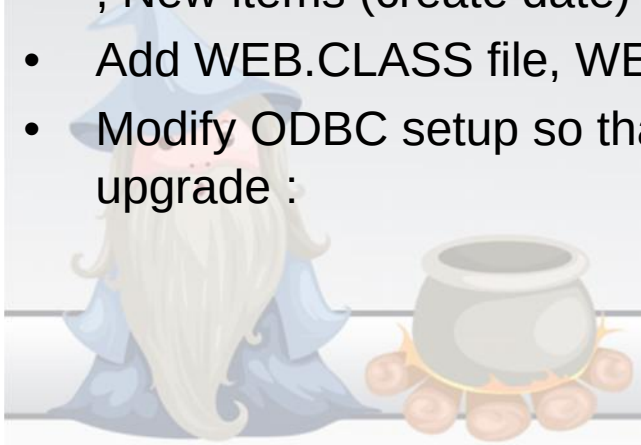
- Create a Template based upon price.1 call it Order Guide –
- Modify the Order Purge in EOD to check a Parameter and allow for a number of days of Completed Orders to keep before moving to ORDER.HIST.,
- Add method to cancel order from Order Entry Line items - don’t force to total time
- Add method to show Frt minimum from Customer Master in OE Line Input - top of screen next to order total
- Modify RA Returns so that if you enter a Lot with an Expiration Date and the Lot is no longer on file, it defaults to the original Expiration Date on the Release and not use the return date.
- Add the Ship Date to the Packing form.
- Update invoice print to print a message for pedigree items . from document messages file
- Remove old pricing code from the Product Grid style lookup
- Add new dictionaries to Prod Mast ODBC for :Hot Seller (2mos) Best Seller (12mos) , New items (create date)
- Add WEB.CLASS file, WEB.CLASS.DESC and WEB.CLASS.IMAGE to ODBC.
- Modify ODBC setup so that Custom Dictionaries don’t get overwritten during an upgrade :



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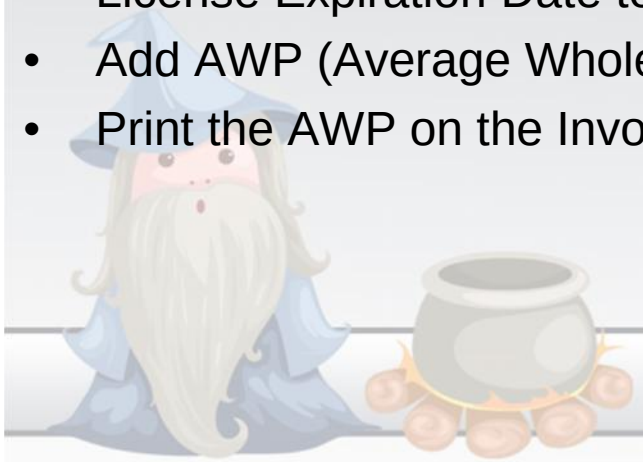
- Add Lic.Exp.Date to the ODBC setup for the Ship.To file.
- Modify PO Receipts to have the option of bypassing the Putaway to the Receiving Location.
- Modify the Purchase Order Receipt adjustments and the Lot Expiration Date maintenance to update the Serial.Audit file when changing a Lot Expiration date.
- Add Total Qty to the Receipts Posting Register
- Add a popup message in Purchase Order Receipt Adjustments to warn when a pedigree item must be manually updated or the Receipt should be cancelled and re-received..
- Modify PO Receipts Line item screen to not automatically go to the Location/Qty popup screen if there is only one location on the line.
- Add a new function to Shift F7 called "Locations" and have it bring up the Location/Qty popup on demand as long as they are on a line.
- Add fields for DEA License Expiration Date, Wholesale License# and Wholesaler License Expiration Date to the VENDOR SHIP TO AND VENDOR MAINTENANCES.
- Add AWP (Average Wholesale Price) to the Prod.Pharma file.
- Print the AWP on the Invoice form and the Reorder Label.



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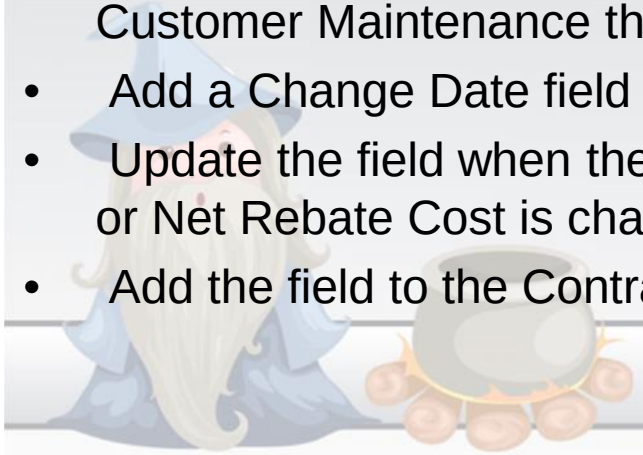
- Modify the Rebateable flag in Customer Contracts to read "Use Contract" instead of "Rebateable"
- Create a Special Price Listing by Product.
- Add the Cost field in INV.RCPT to the PRICE.COST.FILE for proper conversions.
- Create a library of standard MDS Rebate Formats that can't get overwritten.
- Modify the GLN to come from the shipto file and if not there then the customer file.
- Make the UPN match up with the GTIN unit of measure in the prod.mast file.
- Add new field to company maint Buying Group for DealerID - use in sales tracing if not null add to help in contract header to advise them to enter this for sales tracing.
- Add Vendor Name, Salesman Code and Salesman Name to the sales export
- Modify the Price Maintenance for a Product to add the option for P (entered Price) to the available options for UM pricing.
- Add an option to Pricing to specify that if the Price.1 record for the actual customer is expired or returns 0 price and if there is a Contract Customer set to 1 or 3 in Customer Maintenance then use the Contract Customer price.
- Add a Change Date field to the Contract Detail Maintenance.
- Update the field when the Contract Detail is created and when the Agree Sell Price or Net Rebate Cost is changed.
- Add the field to the Contract.Det Dict and ODBC Dict.



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- Create Default Dashboard Setup options, Create Operator Specific KPIs such as Total Orders entered by an Operator or Total Lines entered by an Operator.
- Create a program to generate the KPIs for each Operator in the Operator table., Also Add Option to Create Salesman Specific if a Salesman Number exists in the Operator File
- Add an Audit Trail to Ship Tos changed or created in Order Entry or Remotenet.
- Create a Ship To Audit report to show any ship tos updated for a date range
- Add a program to "Invoice Releases with Failed Auth Codes" to the Base A/R Menu.
- Update prospect status code to have a sort code for reports allowing the report to sort P+,P,P- , S+, S, S- etc
- Add Vendor and PO# to the Intransit Listing.
- Modify the Lot Tracking Report to show Invoice# in addition to Release#.
- Add to Button on Lot Serial Inquiry and add serial # and other fields from the inquiry to the report.
- Add Menu Option to Create Alerts by salesman for sales managers and sales rep by service rep

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- Modify Report Capture to allow you to enter a line # and have it go directly to the page containing that line without actually going into view on the report.
- Add the Account Name to the emails that get sent out by the EOD/EOY.
- Modify the quote reports by customer and by product to add additional dates
- Add PO# to the Sales Tracing Export to Excel.
- Modify the Base Form processes to allow for HTML type forms to be used.
- Add logic to MDS NX to allow for a Customer Item# field on the Product Tab.
- Modify the Lookups to have a Save button which will save all the current positions

- Addl Remotenet Mods Not listed

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mds NX

Thank You

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