

MDS Quick Guide – Mobile Web CRM

V 1.1 updated 04/13/21.

Overview:

This quick guide shows you how to setup your mobile CRM access for salespeople to automatically login and access using Phones or Tablets.

Step 1. Setting up access – you will need the following setup in your Remotenet user maintenance.

Application: RemoteNet User Maintenance

RemoteNet User ID: DAVID

Last Updated: 12/24/20 01:33:05pm

1.Password: DAVID

2.Customer No.: LRMCM LEESBURG REGIONAL MEDICAL

3.Vendor No.:

4.Salutation/Name:

5.Last Name:

6.Title:

7.Department Name:

8.Telephone#:

9.Fax Number:

10.Email Address: DAVID@TSHINC.COM

11.Default Co. No.: 01 Base Medical Supply

12.Default Ship-To: R SAME AS CUSTOMER

13.Default Warehouse: 001 New Jersey Location

14.Cash Customer Flag:

15.Dept No.:

16.Show Master AR Info:

17.Show Credit Cards: Y

18.User Credit Card:

22.Salesman Flag: Y

23.Salesman No.: 111

24.Sism Operator Code: DF

21.Filter By Shipto: N

Please make a selection, OK/END to Save,or Cancel

PAGE 1 OF 2

Help Ok/End Insert Delete Prev Next Inquiry Cancel Off Popup

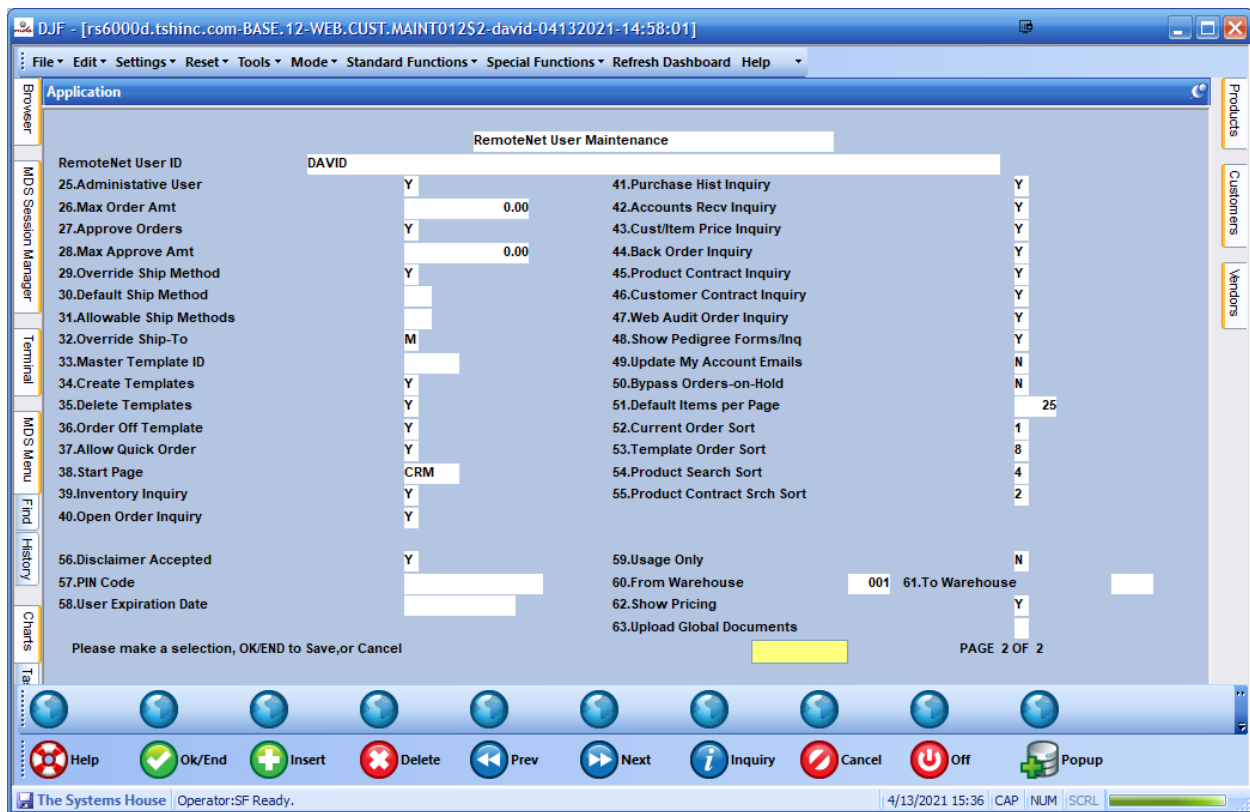
The Systems House | Operator:SF Ready. 4/13/2021 15:35 CAP NUM SCRL

FIELD 22 – SALESMAN – needs to be a Y

Field 23 Salesman No. – needs to be a valid salesman NUMBER or ALL

Field 24 Sism Operator code – needs to be a valid MDS operator code – this is to track notes made on the backend and on the web , using the same id – if you do not have one it's just going to use the web operator..

To start them off at CRM – go to Field 38. Start Page and choose CRM.



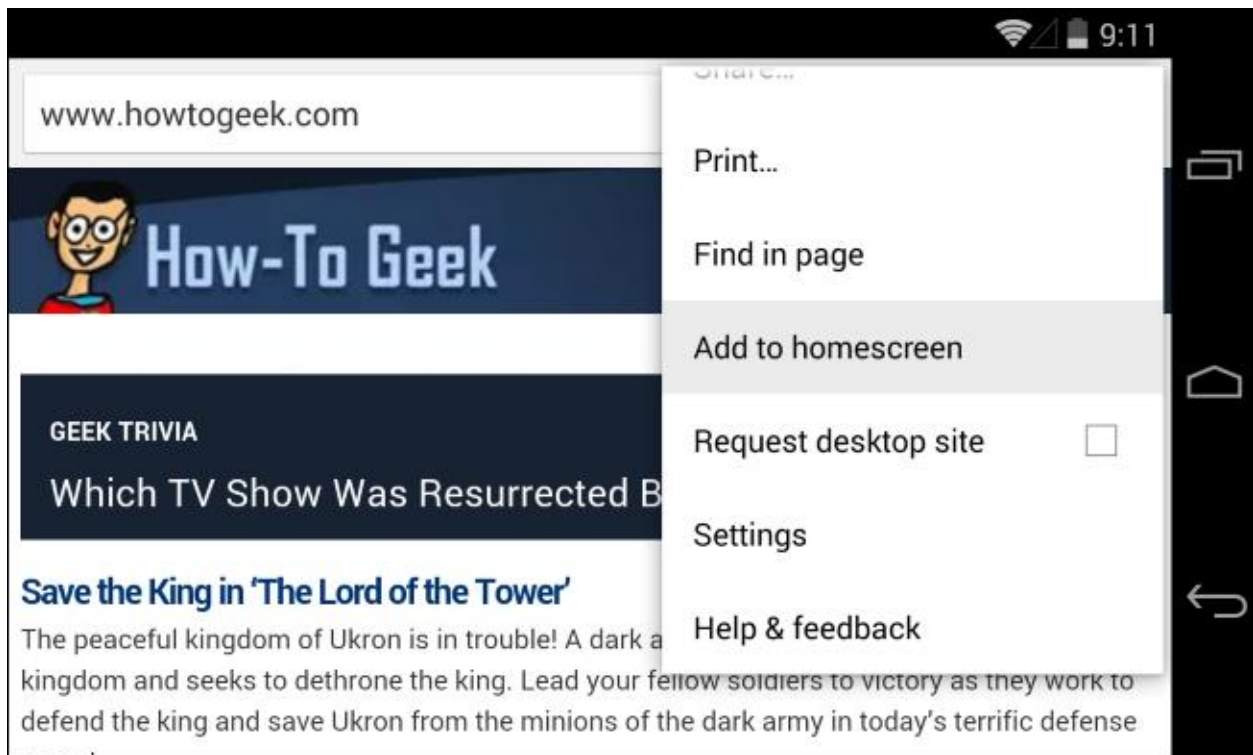
Step2. – Setting up your device, you will need your Remotenet Website URL (or standard website with a Remotenet login)

Your smartphone or tablet's home screen is not just for apps. Whatever platform you are using, you can pin your mobile CRM website to your home screen so you can quickly access it.

Ref: <https://www.howtogeek.com/196087/how-to-add-websites-to-the-home-screen-on-any-smartphone-or-tablet/>

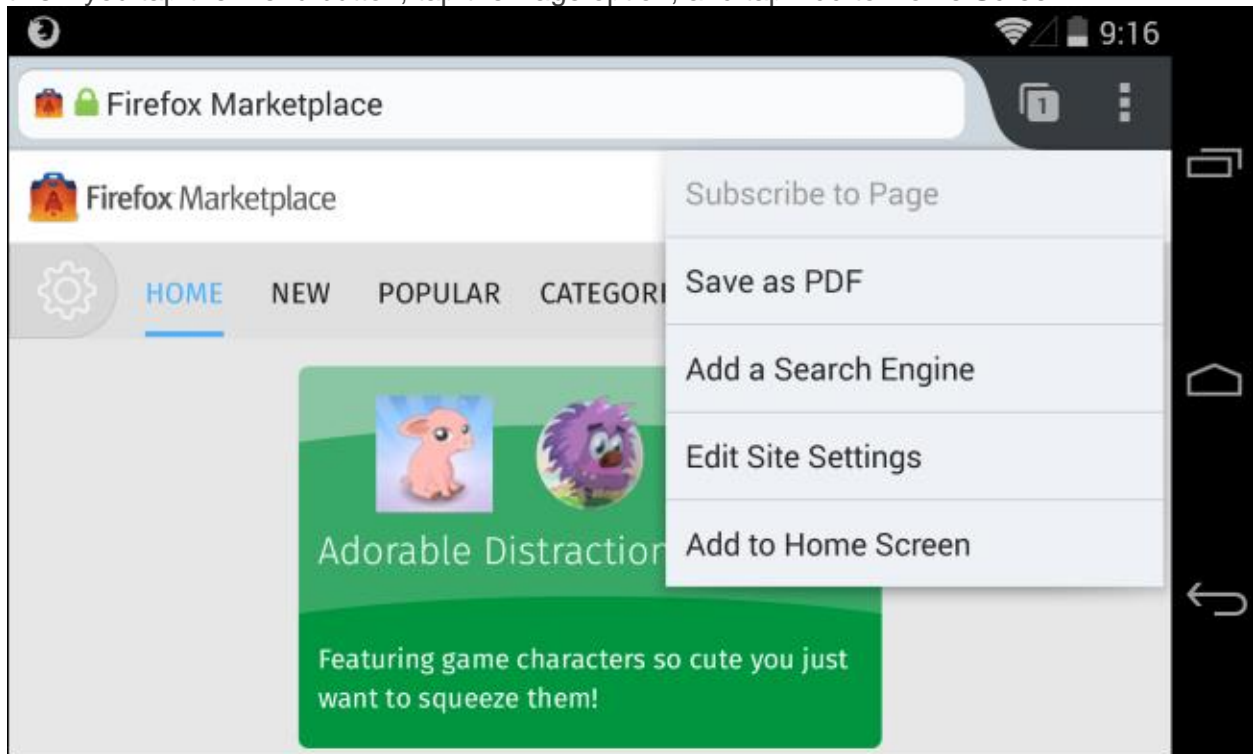
Android

Launch Chrome for Android and open the website or web page you want to pin to your home screen. Tap the menu button and tap Add to home screen. You will be able to enter a name for the shortcut and then Chrome will add it to your home screen.



The icon will appear on your home screen like any other app shortcut or widget, so you can drag it around and put it wherever you like. Chrome for Android loads the website as a “web app” when you tap the icon, so it will get its own entry in [the app switcher](#) and won't have any browser interface getting in the way.

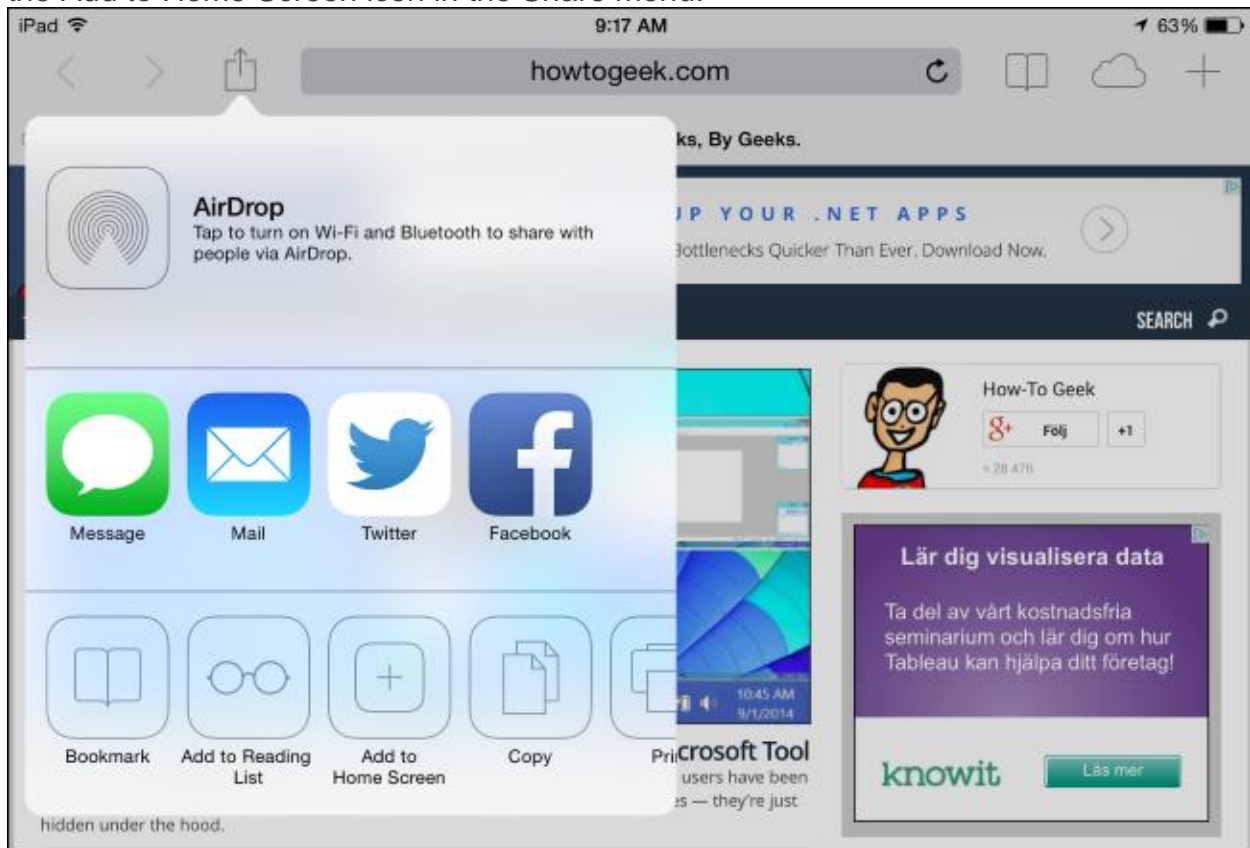
Other popular Android browsers also offer this feature. For example, Firefox for Android can do this if you tap the menu button, tap the Page option, and tap Add to Home Screen.



iPhone, iPad, & iPod Touch

Launch the Safari browser on Apple's iOS and navigate to the website or web page you want to add to your home screen. Tap the Share button on the browser's toolbar — that is the rectangle with an arrow pointing upward. It is on the bar at the top of the screen on an iPad, and on the bar at the bottom of the screen on an iPhone or iPod Touch. Tap

the Add to Home Screen icon in the Share menu.



You will be prompted to name the shortcut before tapping the Add button. The shortcut can be dragged around and placed anywhere, including in app folders — just like a normal app icon. (To create app folders on iOS, touch-and-drag an app’s icon onto another app’s icon and hold it there for a moment.) When you tap the icon, it will load the website in a normal tab inside the Safari browser app.

Other browsers, like Chrome for iOS, do not offer this feature. Due the limitations in Apple’s iOS, [only Apple’s own Safari browser is allowed to do this](#). If you have another type of smartphone or tablet, it probably has this feature, too. Just open its browser and look in its menu for an option named something like “Add to home screen” or “Pin to home screen.”

To remove a website shortcut from your device’s home screen, just long-press the shortcut and remove it like you would any other app icon.

Step 3. Accessing your WebCRM and Adding notes.

Once you have logged in you will have the option to search your prospect list and select a prospect/customer to add a note or update.

CRM Call List 7.0

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0 Item(s) \$0.00

Remotenet CRM - Daily Call and Contact List

Initial Calls:	Daily:	1	Weekly:
Total Calls:	Daily:	5	Weekly:
01 PHONE:	Daily:	2	Weekly:
02 EMAIL:	Daily:	2	Weekly:
03 LINKED IN:	Daily:	1	Weekly:

REFRESH UNIVERSAL SEARCH

Salesman Activity and Notes to Filter Last Note Date

to Filter Follow Up Date

Copy CSV Excel Print

Search:

Customer Prospect Number	Salesman	Account Status	Customer Information
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
100665	001 MARK SPIECKER	Customer	CRAIG GE CRAIG DY 201-555-1 CDYKESg
100666	001 MARK SPIECKER	Customer	Joanne H joanne m 610-506-C jmakely@

After selecting your customer or prospect you can view details and or make notes about your interaction with them.

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

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

Last Updated at: 03:29:45pm on 04/13/21

Customer Details +

Prospect Details +

Custom Data Fields +

Document Archive +

Follow-up and Notes +

Note #:	1
Date Time:	05/14/2020 02:05pm
Created By:	DAVID
Contact Person:	👤 CRAIG DYKES
Notes:	👤 added a note
Action:	👤 02
Completion Date:	👤
Note #:	2
Date Time:	05/01/2020 04:24pm
Created By:	DAVIDCRM
Contact Person:	👤 CRAIG DYKES
Note:	👤 Call back next week

After viewing and adding your note you can schedule and appointment for your next follow-up and return to your prospect list.

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Custom Data Fields +

Document Archive +

Follow-up and Notes -

Prospect Status: CUS

Next Step: Call Back

Lead Source: Trade show 2020

Business Class: 04

Note Contact: CRAIG DYKES

Date: 04/10/2021

Time: 3:30pm

Select a Quick Note ADD NOTE

Office visit - said to come back next week

Select an Action Code Action Completion Date

Follow Up Date: 04/29/2021

Follow Up Time: 4:00pm

Days Until Call: -19462

Schedule Appointment: MSPIECKER@STAQPHARM

EMAIL/ADD APPOINTMENT TO CALENDAR DELETE FOLLUP DATE/TIME

Note #: 1

Date Time: 05/14/2020 02:05pm

Created By: DAVID

Contact Person: CRAIG DYKES

Notes: added a note

Actions: 02

