

MDS Quick Guide RemoteNet Salesman Setup

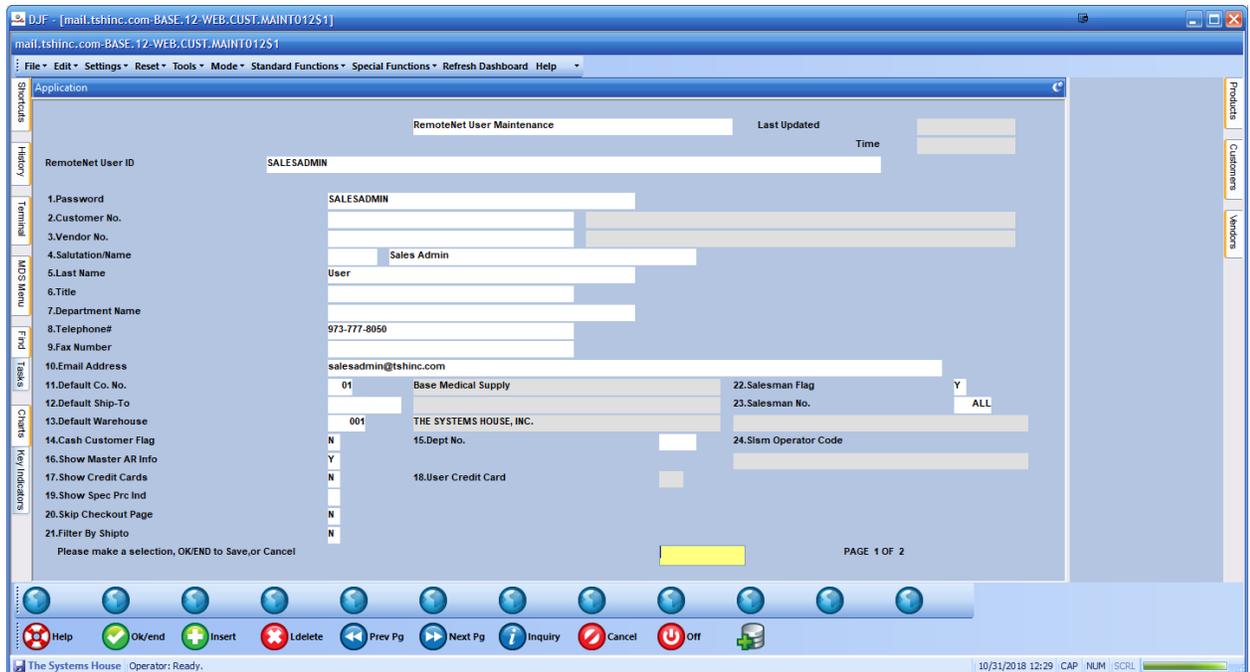
Overview :

Remotenet allows you to setup a number of different types of logins, when using the salesman access tools, your salespeople can have access to Pricing and Costing information as well as detailed inventory by lot number, a salesman dashboard with reporting tools and detailed Gross Profit information for each of their accounts.

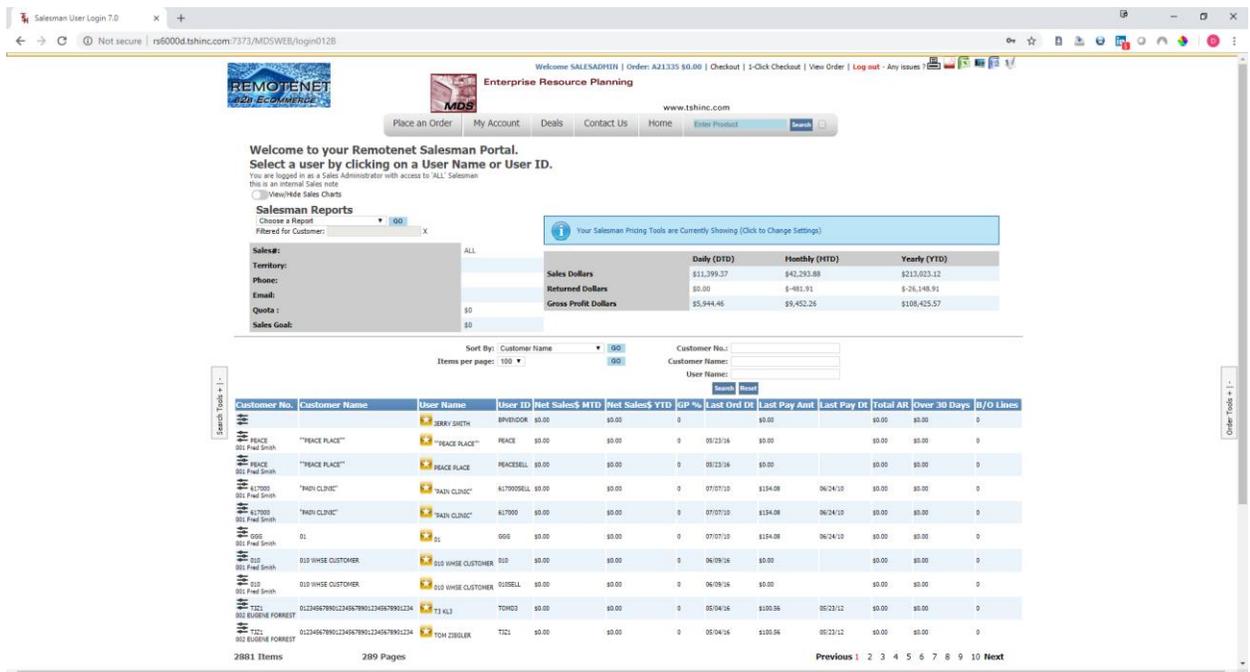
1. Salesman Setup- Create an Initial Login there up to three levels of access for a salesman login
 - A. Superuser / Sales Administrator – Can see any web login for any customer
 - B. Sales Managers – Can see a list of other salesman’s customer web logins as well as their own
 - C. Salesman user – Can only see their customers (defined in the customer details as salesman 1 or salesman 2)
 - D. Salesman user manually setup and or override the customers available on the Web



Example 1 – Sales admin – view all salesman – enter “ALL” in the salesman field after setting the salesman flag in the remotenet user maintenance to a “Y”



WEB VIEW: - Will add note to the Sales Message and show the salesman for each login/customer



Example 2 – Sales Manager , setup the remotenet user with the standard salesman code Then setup access to multiple salesman using the web sales manager maintenance

Remotenet Enterprise Resource Planning

Welcome Fred Smith to your Remotenet Salesman Portal.

Select a user by clicking on a User Name or User ID.

You are logged in as a Sales Manager with access to:
 002 EUGENE FORREST
 003 LARRY MERAN
 004 ROBERT PRATT
 This is an internal Sales note
 View/Hide Sales Charts

Salesman Reports

Choose a Report: X

Filtered for Customer:

Sales#: 001
 Territory: 02 NORTH EAST
 Phone: 973-777-8050
 Email: support@tshinc.com
 Quota: \$0
 Sales Goal: \$0

Your Salesman Pricing Tools are Currently Showing (Click to Change Settings)

	Daily (DTD)	Monthly (MTD)	Yearly (YTD)
Sales Dollars	\$15,881.43	\$46,639.63	\$173,231.74
Returned Dollars	\$0.00	\$-465.07	\$-25,651.49
Gross Profit Dollars	\$4,069.14	\$7,445.84	\$86,653.96

Sort By: Customer Name | Items per page: 100 | Customer No.: | Customer Name: | User Name: |

Customer No.	Customer Name	User Name	User ID	Net Sales\$ MTD	Net Sales\$ YTD	GP %	Last Ord Dt	Last Pay Amt	Last Pay Dt	Total AR	Over 30 Days	I/O Lines
001	TZL	TZL	TZL	\$0.00	\$0.00	0	06/04/16	\$100.56	06/23/12	\$0.00	\$0.00	0
002	EUGENE FORREST	023456789012345678901234	023456789012345678901234	\$0.00	\$0.00	0	06/30/15	\$0.00		\$0.00	\$0.00	0
002	LINDA	02 3456789012345678901234	02 3456789012345678901234	\$0.00	\$0.00	0	06/30/15	\$0.00		\$0.00	\$0.00	0
002	EUGENE FORREST	ABC123	ABC123	\$0.00	\$0.00	0		\$0.00		\$0.00	\$0.00	0
002	EUGENE FORREST	ABC123	ABC123	\$0.00	\$0.00	0		\$0.00		\$0.00	\$0.00	0
001	NCUST-AR	BENUS TEST CUSTOMER	BENUS TEST CUSTOMER	\$0.00	\$0.00	0	04/15/13	\$0.00		\$0.00	\$0.00	0
001	Fred Smith	BENUS TEST CUSTOMER	BENUS TEST CUSTOMER	\$0.00	\$0.00	0	02/29/16	\$600.00	01/29/10	\$1,494.26	\$1,494.26	0
002	LARRY MERAN	BENUS-CUSTOMER	BENUS-CUSTOMER	\$0.00	\$0.00	0	05/13/09	\$30.00	01/12/04	\$557.42	\$557.42	0
002	CORBEN	CORBEN CORP	CORBEN CORP	\$0.00	\$0.00	0	05/13/09	\$30.00	01/12/04	\$557.42	\$557.42	0
002	EUGENE FORREST	CUSTOMER TYPE	CUSTOMER TYPE	\$0.00	\$0.00	0	06/09/06	\$0.00		\$15.00	\$15.00	0
002	LARRY MERAN	CUSTOMER TYPE	CUSTOMER TYPE	\$0.00	\$0.00	0	06/09/06	\$0.00		\$15.00	\$15.00	0
002	DAL	DAL INC	DAL INC	\$0.00	\$0.00	0	12/17/08	\$0.00	01/28/74	\$350.00	\$350.00	0
002	LARRY MERAN	DAL INC	DAL INC	\$0.00	\$0.00	0	12/17/08	\$0.00	01/28/74	\$350.00	\$350.00	0
002	EUGENE FORREST	GOLIATH PRINTING	GOLIATH PRINTING	\$0.00	\$0.00	0	10/22/09	\$0.00	09/02/84	\$431.02	\$431.02	0
002	EUGENE FORREST	GOLIATH PRINTING	GOLIATH PRINTING	\$0.00	\$0.00	0	10/22/09	\$0.00	09/02/84	\$431.02	\$431.02	0

Example 3 – Salesman user with access to just their customers

Application: Remotenet User Maintenance

Last Updated: 10/31/18
Time: 12:50:36pm

RemoteNet User ID: SALES002

1. Password: SALES002

2. Customer No.: UMC UMC MEDICAL

3. Vendor No.: UMC MEDICAL

4. Salutation/Name: Sale Demo

5. Last Name: only 002

6. Title:

7. Department Name:

8. Telephone#:

9. Fax Number:

10. Email Address: sales-002@tshinc.com

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

12. Default Ship-To:

13. Default Warehouse: 001 THE SYSTEMS HOUSE, INC.

14. Cash Customer Flag: N

15. Dept No.:

16. Show Master AR Info: Y

17. Show Credit Cards:

18. User Credit Card:

22. Salesman Flag: Y

23. Salesman No.: 002

24. Sism Operator Code: EUGENE FORREST

25. Sism Operator Code: FW

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

PAGE 1 OF 2

Help Ok/End Insert Ldelete Prev Pg Next Pg Inquiry Cancel Off

The Systems House Operator: Ready. 10/31/2018 12:42 CAP NUM SCRL

WEB VIEW:

Salesman User Login 7.0

Welcome SALES002 | Order: A21337 \$0.00 | Checkout | 1-Click Checkout | View Order | Log out - Any issues

Electronic Document Management

Place an Order | My Account | Deals | Contact Us | Home | Enter Product

Welcome EUGENE FORREST to your Remonet Salesman Portal.
Select a user by clicking on a User Name or User ID.

Choose a Report: View/Hide Sales Charts

Salesman Reports

Filtered for Customer: 003

Sales#: 003
Territory: 01 MIDWEST
Phone: 315-454-6544
Email: EFORREST@TSHINC.COM
Quota: \$25,000
Sales Goal: \$0

Your Salesman Pricing Tools are Currently Showing (Click to Change Settings)

	Daily (DTD)	Monthly (HTD)	Yearly (YTD)
Sales Dollars	\$0.00	\$122.10	\$122.10
Returned Dollars	\$0.00	\$0.00	\$0.00
Gross Profit Dollars	\$0.00	\$120.88	\$120.88

Sort By: Customer Name | 100 | Customer No.:
Items per page: 100 | User Name:

Customer No.	Customer Name	User Name	User ID	Net Sales\$ MTD	Net Sales\$ YTD	GP %	Last Ord DT	Last Pay Amt	Last Pay DT	Total AR	Over 30 Days	I/O Lines
1221	01234567890123456789012345678901234	1221SELL	000	\$0.00	\$0.00	0	09/04/16	\$100.00	09/23/12	\$0.00	\$0.00	0
LINDA	52 SUNNET ROAD	LINDASSELL	000	\$0.00	\$0.00	0	04/30/15	\$0.00		\$50.00	\$50.00	0
ABC123	ABC123	ABC123SELL	000	\$0.00	\$0.00	0		\$0.00		\$0.00	\$0.00	0
NCUST#01	BENIG TEST CUSTOMER	NCUST#01SELL	000	\$0.00	\$0.00	0	04/15/10	\$0.00		\$0.00	\$0.00	0
CORBIN	CORBIN CORP	CORBINSELL	000	\$0.00	\$0.00	0	05/13/09	\$35.00	01/12/04	\$587.42	\$587.42	0
GOLATH	GOLATH PRINTING	GOLATHSELL	000	\$0.00	\$0.00	0	10/12/09	\$0.00	08/02/94	\$452.02	\$452.02	0
HITT	HITT	HITZSELL	000	\$0.00	\$0.00	0	08/26/94	\$0.00		\$0.00	\$0.00	0
RACHEL	RACHEL	RARRSELL	000	\$0.00	\$0.00	0	01/19/94	\$170.00	04/05/94	\$200.00	\$200.00	0
REBATE	REBATE CONTRACT TESTING	REBATEZSELL	000	\$0.00	\$0.00	0	11/16/94	\$0.00		\$200.00	\$200.00	0
SY	SY	SYSELL	000	\$0.00	\$0.00	0		\$0.00		\$0.00	\$0.00	0

24 Items | 3 Pages | Previous 1 2 3 Next

Example 4 – Salesman user with access to to a list of specific customers, setup the standard salesman then use the Assign Customer to salesman screen to list the web logins and or customers they have access to.

NOTE: if you use the automated options ie. Create Salesman Web Login or Add/Update New customers to salesman they will override your manual settings.

DJF - [mail.tshinc.com-BASE:12-WEB.CUST.MAINT01251]

mail.tshinc.com-BASE:12-WEB.CUST.MAINT01251

File Edit Settings Reset Tools Mode Standard Functions Special Functions Refresh Dashboard Help

Application

RemonetNet User Maintenance

Last Updated: 10/31/18
Time: 12:47:44pm

RemonetNet User ID: SALESFEW

1.Password: SALESFEW
2.Customer No.: UMC
3.Vendor No.: UMC MEDICAL
4.Salutation/Name: Salesman Access
5.Last Name: only 3 customers
6.Title:
7.Department Name:
8.Telephone#:
9.Fax Number:
10.Email Address:
11.Default Co. No.: 01 Base Medical Supply
12.Default Ship-To: 001 THE SYSTEMS HOUSE, INC.
13.Default Warehouse:
14.Cash Customer Flag: N
15.Show Master AR Info: Y
16.Show Credit Cards: N
17.Show Spec Prc Ind: N
18.Skip Checkout Page: N
19.Filter By Shipto: N

22.Salesman Flag: Y
23.Salesman No.: 003 LARRY MERAN
24.Slm Operator Code: ALATONA.OLD

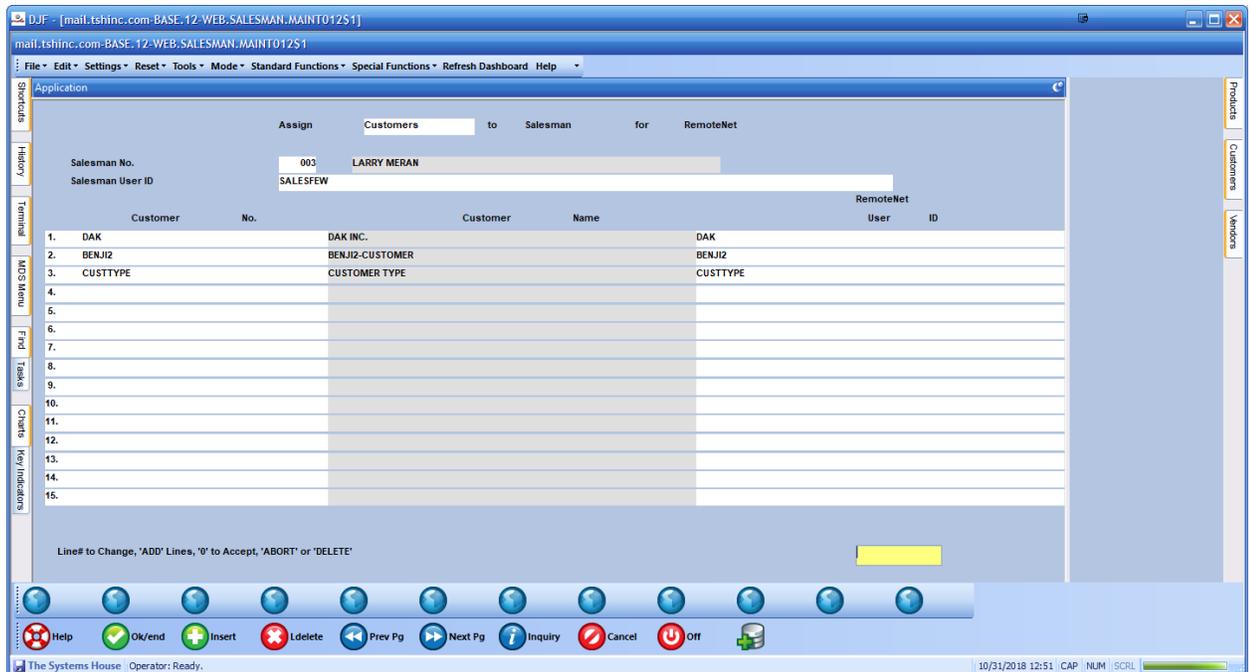
18.User Credit Card:

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

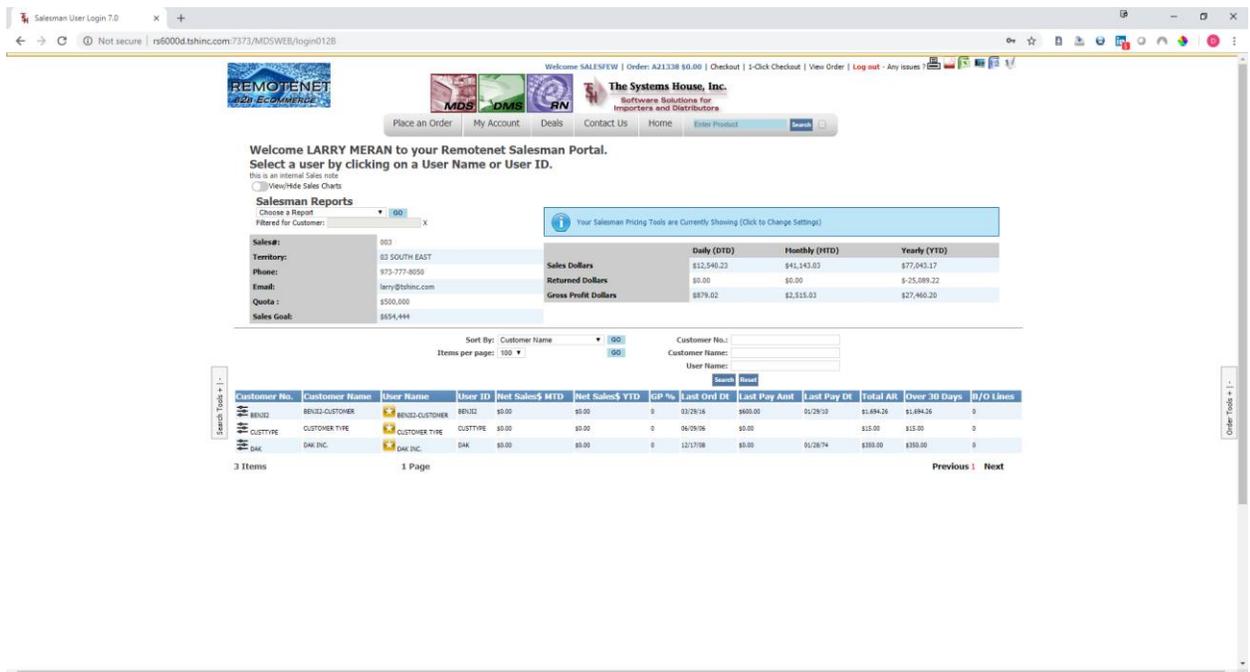
PAGE 1 OF 2

Help OK/end Insert Ldelete Prev Pg Next Pg Inquiry Cancel Off

The Systems House Operator: Ready. 10/31/2018 12:47 | CAP | NUM | SCRL



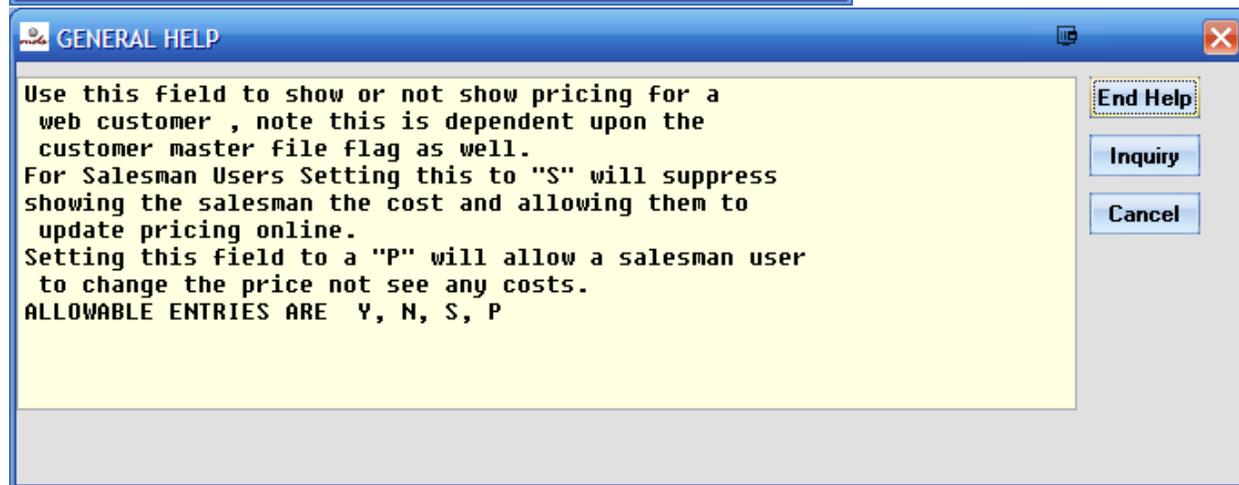
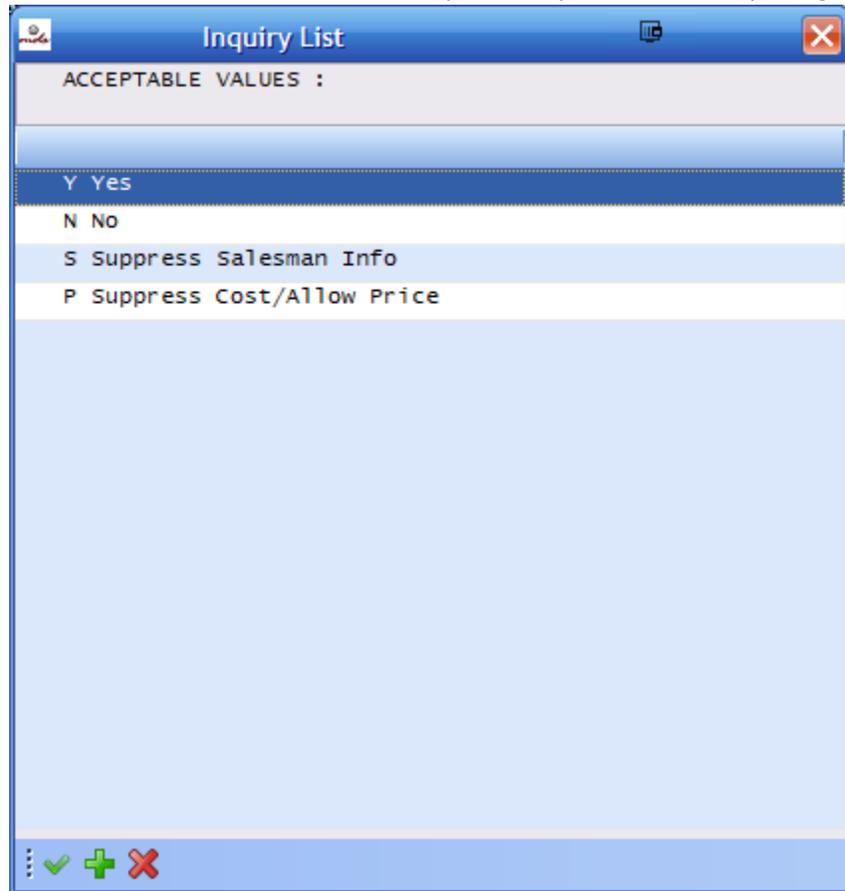
WEB VIEW:



Now that you have setup the logins here are some of the things that only salesman users will see and some options for Pricing and Costing for Remotenet Salesman Users .

1. Pricing Flag by Remotenet Login or Customer master

Under remotenet user maintenance you can update the show pricing field

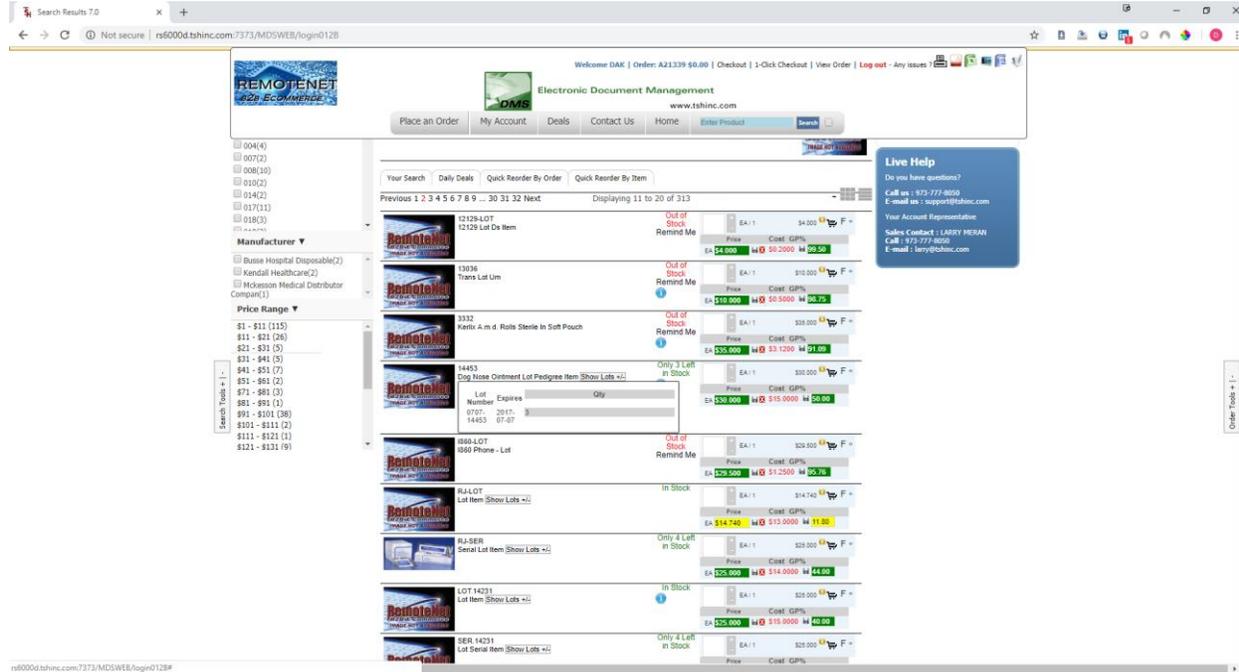


2. Pricing tools on search/entry pages (assuming you have not suppressed it on the pricing option)

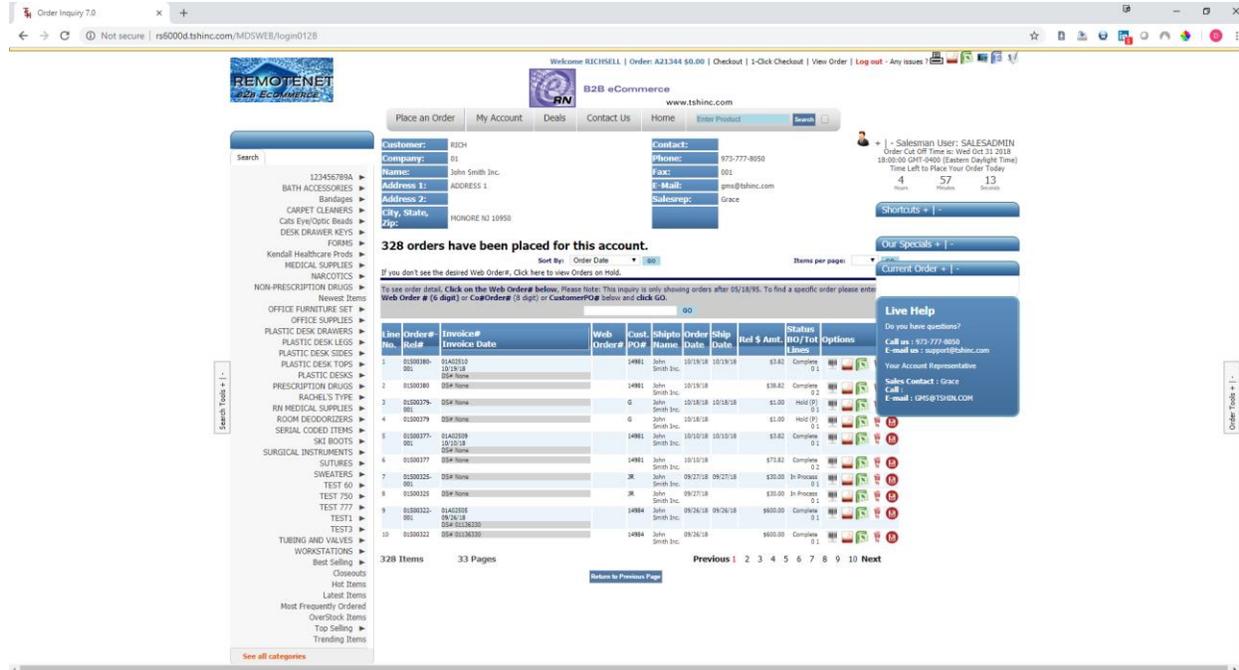
Web view:

Salesman can choose to update the price for a customer and save it , it will show the costs as well as any contracts or rebates available on the item , the colors will be based

on your price hold parameters, and if lot details are available they can see the quantity for each lot available.



3. Lot Details on product search (see above)
4. Drop ship PO details on Order Inquiry



5. Optional , Create Product , Create Customer

The screenshot displays the tshinc.com website interface. At the top, there is a navigation bar with links for 'Place an Order', 'My Account', 'Deals', and 'Contact Us'. A search bar is also present. The main content area shows a list of products, each with a 'Remotenet' logo and a detailed pricing table. The pricing table for each product includes columns for 'Price', 'Cost', 'GPI%', and 'F'. A 'Live Help' sidebar is visible on the right, providing contact information for Larry Meran. The bottom of the page shows the URL 'rs600d.tshinc.com/7373/MDSWEB/login0128'.

Product ID	Description	Price	Cost	GPI%	F
12128-LOT	12129 Lot Os Item	\$4,000	\$0	0%	F
13036	Trans Lot Um	\$10,000	\$0	0%	F
3332	Kerix A m d. Rolo Sterile in Soft Pouch	\$30,000	\$0	0%	F
14403	Dog Nose Ointment Lot Pedigree Item (Show Lots <+>)	\$30,000	\$0	0%	F
860-LOT	860 Phone - Lot	\$28,000	\$0	0%	F
RJ-LOT	Lot Item Show Lots <+>	\$14,740	\$13,000	11.8%	F
RJ-SER	Serial Lot Item Show Lots <+>	\$28,000	\$14,000	50%	F
LOT 14231	Lot Item Show Lots <+>	\$28,000	\$15,000	43%	F
SER 14231	Lot Serial Item Show Lots <+>	\$28,000	\$15,000	43%	F

As you can see there are many options for pricing and costing as well as display and access for your salesman users.

Should you have any questions or comments please feel free to email support@tshinc.com

Or call us at 973-777-8050