

CRM

Relationship Development

MDS Sales Management



CRM / Telemarketing Tools

- MDS CRM
 - Import of Prospect Contact Information
 - First Contact/Classification
 - Tracking Communication
 - Follow through to Close
 - Custom Reports
 - Key Performance Indicator

CRM / Telemarketing Overview

- Automate and integrate every aspect of Prospect contact and progress
- Prospect information passes smoothly from individual to individual
- All individuals dealing with the Prospect have all of the important information required to properly develop the account at their fingertips
- Reports evaluating progress

Data Can be Loaded from Excel

Microsoft Excel - 2007_NJ_Show_Conf_final.xls

File Edit View Insert Format Tools Data Window Help

Replay with Changes... Edit Review...

	A	B	C	D	E	F
	NAME	TITLE	COMPANY	ADDRESS	CITY STATE	ZIP
307	DAVID M CAPODANNO	OFFICER	AMPER POUTZINER & MATTIA	2015 LINCOLN HWY PCD 900	EDISON NJ	07010-3900
308	ANDREW HERF CPA	CPA	ANDREW HERF CPA	19 RUSTIC RD	UPPER SADDLE RIVER NJ	0745
309	ANGELO TSIMPEDES		ANGELO TSIMPEDES CPA	1051 DLOOMFIELD AVENUE 11	CLIFTON NJ	0701
310	DAVID ANGLIN	TAX ACCOUNTANT	ANGLIN ENTERPRISES USA IN	953 EAST 77TH STREET	BROOKLYN NY	11236-3829
311	JUDITH LEVINSKY CPA	PARTNER	ANNUNZATO & LEVINSKY	4738 162ND STREET	FLUSHING NY	11368-4138
312	J A ANNUNZIATO CPA	PARTNER	ANNUNZATO & LEVINSKY	42-06 162ND STREET	FLUSHING NY	11360-4130
313	ANTHONY J MORE CPA	CPA	ANTHONY JOSEPH MORE CPA	2851 S PALM AIRE DR 304	POMPANO BEACH FL	3303
314	ANTHONY M HIRSH		ANTHONY M HIRSH CPA	15 TRIMMER RD A	MONTICELLO NJ	07014
315	WOLFGANG DAUER		ANTOINETTE DAUER CPA	77 BYRON ROAD	BRICK NJ	0872
316	ANTOINETTE BAUER CPA	OWNER	ANTOINETTE BAUER CPA	77 BYRON ROAD	BRICK NJ	0872
317	ANTONIA PUGLIESE		ANTONIA PUGLIESE CPA	134 RIDGE ROAD	LYNDHURST NJ	07037
318	YARK MARDJAL	CONTROLLER	APOLLO DISTRIBUTION CO	123 PASSAIC AVE	FARFIELD NJ	07003
319	KAISER DATHAN	DEFS	AR700 DEVELOPMENT LLC	207 MILL RACE DRIVE	PAI VERO VA	18014
320	JACK CIPILINSKI CPA	CFO	ASPER CAMPUS	123 DONCASTER ST	WINNIPEG MANITOBA	R0K 2D2
321	ROBERTO F TOBIAS	ACCOUNTANT	ASSOCIATION FOR ENERGY AF	505 ETH AVENUE SLITE 1301	NEW YORK NY	1001
322	HICHAR O SAIBO	PARTNER	AS ROFF & SALCO	34 HENNINGTON AVE SUITE	FRERFORD NY	1157
323	STUART A ASTROFF CPA	PARTNER	ASTROFF & SALCO	10 APPLETREE LANE	EAST DRUNGSWICK NJ	07001
324	KATHLEEN VETZGER CPA	TAX DIRECTOR	AT&T	ONE AT&T WAY ROOM 4A245	BEDMINSTER NJ	0792
325	DOM BARTLEY	CFO	ATLANTIC PACIFIC LOGISTIC	1 SLATER DR	ELIZABETH NJ	0721
326	JEFF PATTERSON	CFO	ATLANTIC PACIFIC LOGISTIC	1 SLATER DR	ELIZABETH NJ	0722
327	ELLIOT ADTER	CIO	ATLANTIC PACIFIC LOGISTIC	1 SLATER DR	ELIZABETH NJ	0722
328	SHANAKHAWAIA	ACCOUNTANT	ATLAS CORP CO NORTH AMERICA	34 MAPLE AVE PO BOX 2188	PINE BROOK NJ	07115
329	ALAN L YSTER	DIRECTOR	ATTORNEYS & ACCOUNTANTS I	307 THIRD AVENUE	ADDURY PARK NJ	0771
330	ERIC FAJANT	QUALIFIED INTERMEDIARY	ATTORNEYS & ACCO. INTANTS I	1238 HIGHWAY 34	ARFFORDEN NJ	0774
331	JO IN HOWLETT	PRESIDENT	AVIZA INC	25 CROMWELL COURT	CLARK NJ	0705
332	V SAUNDERS CPA	ASSISTANT VICE PRESIDENT	AXA EQUITABLE	1230 6TH AVENUE	NEW YORK NY	1010
333	SHARMA CHAUHARY		R CHAUDHARY CPA	7 ADIR COURT SUITE F	FREDERICKSVILLE NJ	0881
334	D L NICKERSON CPA	PRESIDENT	D L NICKERSON & ASSOCIATE	5 GOLD HILL ROAD SOUTH 120	MENDHAM NJ	0794
335	VARY KACAN	ACCOUNTANT	BACK OFFICE SUPPORT SERV	181 HILLSIDE AVENUE	PISCATAWAY NJ	0885
336	VARY C KACAN		BACK OFFICE SUPPORT SERV	181 HILLSIDE AVENUE	PISCATAWAY NJ	0885
337	VARY DAKER	OWNER	DAKER TAX & ACCOUNTING SC	2001 HULLOCK PLACE	RAHWAY NJ	0705
338	JOSE ROCA	VICE PRESIDENT	BANK LEUM USA	952 FIFTH AVENUE	NEW YORK NY	1003

Ready

Define Search Parameters

MDS for Windows Version 8.1.6 - [RS6000D.tshinc.com-24 T2002-TEL.MARK.CALL.SUMM010\$1]

File Edit Settings View Reset Tools GUI PCA Standard Functions Special Functions Help

Prosp Sls: Sales Management Prospect Call (Summary)

Prospect // To // in list

Prospect Name

State Range To Action

Zip Code To List

Phone Number

Follow Up Dt To

Status Source

Business Notes

Ln#	Prospect #	Name	City	St	Stat	Follow Up Date	Time
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							

Pros Look	Res #days	Search	Action	List	Mds Inq	Cust Ord	Cust Hist	Add Note		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	OFF		Popup

Prospect Summary

MIS for Windows Version 8.1.6 - [RS600001.shinc.com-74-12007-TH.MARK.CALL.SUMMARY051]

File Edit Settings View Layout Tools LUL PCA Standard Functions Special Functions Help

Prospect Sls: 195 Scott Ostro Sales Management Prospect Call (Summary)

Prospect # To # in list 403

Prospect Name To Action

State Range To List

Zip Code To

Phone Number To

Follow Up Dt To

Status unk Source

Business Notes

Ln#	Prospect #	Name	City	St	Stat	Follow Up	
						Date	Time
1.	212569	1B International LTD	New York	NY	U		
2.	211271	A A Feather Co	New York	NY	U		
3.	214914	A Aronson Inc	New York	NY	U		
4.	210487	A T Greenwood Co	New York	NY	U		
5.	212455	A G Color Inc	New York	NY	U		
6.	210490	A T Harris Formal Wea	New York	NY	U		
7.	214017	Acme Designs Corp	New York	NY	U		
8.	210502	AGIP Petroleum Inc	New York	NY	U		
9.	214857	All Discount Copy Sup	New York	NY	U		
10.	212754	American Glass Light	New York	NY	U		
11.	212755	American Glasslight	New York	NY	U		

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

Pros Look	Res /days	Search	Action	List	IMS Inq	Cust Ord	Cust Hist	Add Note		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	OUT		Popup

Call Detail

Sales Management Call Detail Sism 195 Scott Ostro Total 8
 Prospect# Lifeline LifeLine Pharmaceuticals Current 3
 CitySt Miami FI PROSPECT Business Type 07 Pharma Distribution
 Contact Rick Nielson Status Code S- SUSPECT - INI
 Title PR President Follow Up Date 06/05/08
 Phone 305-643-8841 Ext Next Step answer to proposal
 E-Mail rick@lifelinepharm.net
 Web Url http://lifelinepharm.net source Hygen

Operator	Date	Time	Notes/Text	Note#	1 of 5
SRD	05/20/08	14:27	Hello Scott,		
Contact	Rick Nielson		Hope you are well. I was in several meetings this		
Action	CB Call Back	06/05/08	morning. Your presentation was very informative and I understand how it can benefit us. So I really do not need to meet with him. There are several things that I am evaluating and I will get back to you soon.		
Customer Specific Area					
Current System					
quickbooks					
Number of users			Thanks		
Sales\$					

Status Detail

DEMO.12 [RS6000D.lshinc.com -10 T2002 TEL.MARK.CALL.DET01251]

File Edit Settings Rese. Tools GUI PDA Standard Functions Special Functions Help

Sales Management Call Detail **Slam** 195 **Scott Ostro** **Total** 8

Prospect# Lifeline **LifeLine Pharmaceuticals** **Current** 3

CitySt Miami FL **PROSPECT** **Business Type** 07 Pharma Distribution

Contact Rick Nielson **Status Code** S- SPECT INI

Title PR President **Follow Up Date**

Phone 305-643-8841 **Ext** **Next Step**

L-Mail rick@lifelinepharm.net

Web Url http://lifelinepharm.net

Operator	Date	Time	Notes/Text
ERO	05/20/08	14:27	Hello Scott,
Contact	Rick Nielson		Hope you are well. I was in several
Action	CD Call Back	05/05/08	morning. Your presentation was v
			d I understand how it can benefit us. So I really
			do not need to meet with him. There are several t
Customer Specific Area			hings that I am evaluating and I will get back to
Current System			you soon.
quickbooks			
Number of users			Thanks
			8
Sales\$			
			0

STATUS-CD	DESCRIPTION	PURGE-CODE
H-	HOLD - NEXT YEAR	N
I	Initial call made	N
L	LOST	N
N	NO INITIAL	N
NAF	Not a good fit	Y
O	OPEN	Y
OOB	Out of Business	Y
P	PROSPECT	N
P1	PROSPECT W/IN 30 DAY	N
P-	PROSPECT > 90 DAYS	N
R	ROUTINE	N
S	SUSPECT	N
S1	SUSPECT III	N
S-	SUSPECT INITIAL	N

PAGL 1 OF 3

Click here to begin

start | Inbox | Micros... | DEMO.12 - [R... | Internet E... | User_trainin... | Microsoft Tow... | 100% | 3:48 PM

Note Capture

DLMO.12 - [RS6000D.tshinc.com-40 12002-1LL.MARK.CALL.DL101251]

File Edit Settings Rese. Tools GUI PDA Standard Functions Special Functions Help

Sales Management Call Detail

Slam 195 Scott Ostro Total 8

Prospect# Lifeline Lifeline Pharmaceuticals Current 3

CitySt Miami FL PROSPECT Business Type 07 Pharma Distribution

Contact Rick Nielson Status Code S SUSPECT INI

Title PR President Follow Up Date 06/05/08

Phone 305 613 8811 Ext Next Step answer to proposal

E Mail rick@lifelinepharm.net

Web Url http://lifelinepharm.net Source Hygen

Operator	Date	Time	Notes/Text	Note#
SRO	05/20/08	14:27	Hello Scott, Hope you are well. I was in several meetings this morning. Your presentation was very informative and I understand how it can benefit us. So I really do not need to meet with him. There are several things that I am evaluating and I will get back to you soon.	1 of 5
Rick Nielson			Thanks	
CD	06/05/08			

Customer Specific Area

Current System

quickbooks

Number of users 8

Sales\$ 8

OK Cancel Check F 3

start Inlucy - Micros... DEMO.12 - [R... 2.0 Internet E... User_meeting... Microsoft Pow... 100% 3:50 PM

CRM Call Detail Page Two

DEMO.12 - [RS6000D.tshinc.com-22 T2002-TEL.MARK.CALL.DET01252]

File Edit Settings Reset Tools GJJ FDA Standard Functions Special Functions Help

Sales Management Prospect Call Detail

Prospect#	200251	Phone	800-442-9288	Ext	
Contact1	David Trussell	Fax	318-255-4785		
Title					
E-Mail					

Additional Contacts					
Contact Name	Title	E-Mail Address	Phone	Fax	Ext
1	David Trussell	dtussell@dhwholesale.com	800-442-9288	318-255-4785	
2					
3					
4					

Click on a field to update or OK/END to Accept: XXXXXX

PAGE 2 OF 3

Sales Detail Page 3

DEMO.12 - [RS6000D.tshinc.com-22 T2002-TEL.MARK.CALL.DET012\$3]

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

Sales Management Prospect Call Detail

Prospect#	200251	PROSPECT	Create Date	03/11/03
Name	D & H Wholesale Medical,			
Address1	P.O. Box 40			
Address2	609 Willow Glen			
Address3				
City/State	Ruston	LA	71273-0040	Country
Contact	David Trussell			
Title				
Phone	800-442-9288	Ext		
Business	01	Medical Distribution		
Status Code	S+	SUSPECT +++		
Comments				
SIC Code	5047	Medical and hospital equi		
E-Mail				
Web Uri	www.dhwholesale.com			

Number of Users	12	Probability of Close	
Number of Employees		Proposal Date	
Close Date			

Tracking Communications

MDS for Windows Version 8.1.6 - [RS6000D.tshinc.com-24 T2002-CRM.CALL.DET.EMAIL012\$1]

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

Sales Management Prospect Call Detail

Prospect# GEMLINE

Credit Limb [] Total 6

Credit Hold [] Current 1

Send Email Entry

Send Email?

1. Recipient

1.	esaman@gemlinebags.com	Y
2.	sgreenspon@gemlinebags.com	N
3.	mlbarclay@gemlinebags.com	N
4.		
5.		

2. From esoto@tshinc.com

3. Subject

4. Message

Proposal submitted we will have an answer by the end of May.

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

Email Created

The screenshot displays two overlapping windows from the MDS for Windows software. The top window, titled "Sales Management Prospect Call Detail", shows a form for prospect information. The bottom window, titled "re: Proposal Response - Message", shows an email composition interface with a message body containing the text "Proposal submitted we will have an answer by the end of May."

MDS for Windows Version 8.1.6 - [RS6000D.tehinc.com-24 T2002-TEL.MARK.CALL.DETO1051]

Sales Management Prospect Call Detail

Prospect#	GEMLINE	Credit Limit		Total	6
1.Comment	PROMOTIONAL PRODUCTS	Credit Hold		Current	1
2.Name	Gemline	A/R Balance		Ext.	
3.Addr1	Nine International Way	12.Phone#	800 800 3200		
4.Addr2		13.Fax#	978-691-2086		
5.Addr3		14.Source	scott's contact		
6.City	Lawrence MA Country	15.SIC Code			
7.Zip	01043	16.Contact1	Ross M. Seaman		
8.Slsn	195 Scott Ostro	Title1	CO Chief Operating Offi		
9.Bus	02 Wholesale Distribution	17.Status	P PROSPECT > 90		
10.E-Mail	rseaman@gemlinebags.com	18.FollowUp	06/05/07		

re: Proposal Response - Message

File Edit View Insert Format Tools Table Window Help

Send [Icons] Options: HTML

To: rseaman@gemlinebags.com

Cc:

Subject: re: Proposal Response

Times New Roman 12

Proposal submitted we will have an answer by the end of May.

start | Microsoft Outlook | Internet Explorer | User: nesth2... | Microsoft Power... | MDS for Windo... | 100% | 2:00 PM

Email Confirmation

MDS for Windows Version 8.1.6 [RS60000.lshinc.com 21 | 2002 TEL.MARK.CALL.DE | 01031]

File Edit Settings View Report Tools SQL PDA Standard Functions Special Functions Help

Sales Management Prospect Call Detail

Prospect# GEMLINE

1.Comment PROMOTIONAL PRODUCTS

2.Name Gemline

3.Addr1 Nine International Way

4.Addr2

5.Addr3

6.City Lawrence MA **Country**

7.Zip 01843

8.Slan 195 Scott Oströ

9.Dus 02 Wholesale Distribution

10.E-Mail rseaman@gemlinebags.com

11.WebUrl www.gemlinebags.com

Credit Limit

Credit Hold

A/R Balance

12.Phone# 800-800-3200

13.Fax# 978-691-2005

14.Source Scott's contact

15.SIC Code

16.Contact1 Ross M. Seaman

Title1 CO Chief Operating Offi

17.Status P- PROSPECT > 90

18.FollowUp 06/05/07

Total 6

Current 1

19.Next Step prepare formal proposal

20.	Oper	Date	Time	Email	Notes/Text
1.	SRO	05/11/07	16:44		Proposal submitted we will have an answer by the end of May.
Cont	Ross M. Seaman				
Act					
2.	SRO				
Cont	Ross M. Seaman				
Act					

Enter Line Number to C

Ord Entry Prev Rec HELP OK/END

Inquiry List

Selling Help

Email Addresses Sent for Prospect: GEMLINE For Note Line: 1

Email Address	Date Sent	Time Sent
rseaman@gemlinebags	06/05/07	01:27:50pm
sgreenapen@gemlinebags.com	06/05/07	01:27:50pm
mthardlay@gemlinebags.com	06/05/07	01:27:50pm
rseaman@gemlinebags.com	06/05/07	02:21:12pm

facts pup

Microsoft PowerPoint - [CEM]

start | Internet Explorer | Firefox | MSN | Microsoft Power... | Windows D... | 100% | 2:24 PM

Crystal Reports Design

The screenshot displays the Crystal Reports Design view. The main report area is titled "TSH Prospect Listing By Salesman" and features a logo for TSH Systems. Below the title, the report is grouped by "Salesman: SLSMAN". The data is presented in a table with the following columns:

Customer Name	Status	Contact	# of Users	Lead Source	Next Step
City	State	Industry	Phone #	Ext.	Current System
Group Header #1: PRUSPECT_MAST.SLSMAN - A (GroupHeaderSection1)					
Group #1 Name					
Group Header #2: PRUSPECT_MAST.STAT - A (GroupHeaderSection2)					
Group #2 Name					
Group Header #3: PRUSPECT_MAST.CUST_NAME - A (GroupHeaderSection3)					
A_PROSPECT_ID	STAT	PROS_CONTACT1	NO_L_RFRS	LEAD_SRC	NEXT_STEP
Group #3 Name					
CITY	STATE	INDUSTRY	PHONE#	EXT	CURR_SYSTEM
Details (DetailSection1)					
Notes: CITIES_CA (NOTES_ACTUAL)					
Group Footer #3: PRUSPECT_MAST.CUST_NAME - A (GroupFooterSection3)					
Group Footer #2: PRUSPECT_MAST.STAT - A (GroupFooterSection2)					
Group Footer #1: PRUSPECT_MAST.SLSMAN - A (GroupFooterSection1)					
Report Footer (ReportFooterSection1)					

The left-hand pane shows the "Main Report" tree with a list of database fields including PROSPECT_MAST, Z_ID, ADR1, ADR2, ADR3, A_PROSPECT_NO, CITY, CLOSE_DATE, COMP, CRFATE_DT, CURR_SYSTEM, CUST_NAME, L_MAIL, EXT, LEAD_SRC, NEXT_STEP, NO_FMP, NO_LBLN, UPLN_ACTION, PROB_CLOSE, PROP_DATE, PROS_COMMENT, PROS_CONTACT1, PROS_CONTACT2, PROS_TAX_NO, PROS_PHONE_NO, PROS_SLSM, PROS_SLSM_NAME, PURCH_CODE, SALLS, SLLMAN, STAT, STATE, STATUS_CODE, STATUS_DATE, and STATUS_LINK.

Telemarketing Report

Enter Values

Choose Salesman: Salesman

Available Values:
All Salesmen
Sy Fortig
Phil Sturm
Scott Ostro
David Hertig
Fil Gray
Ayda Monbora
Customers

Selected Values:

Enter a Value:

Remove Remove All

Enter Status Code: State Code

Available Values:
All Status Codes
II
P
A
C
D
I
L

Selected Values:

Enter a Value:

Remove Remove All

OK Cancel

Selected Values

The image shows a software dialog box titled "Enter Values" with a blue title bar and standard window controls (minimize, maximize, close). The dialog is divided into two main sections: "Choose Salesman" and "Enter Status Code".

Choose Salesman: This section has a title "Choose Salesman:" and a label "Salesman" in the top right. It contains two list boxes: "Available Values:" and "Selected Values:". The "Available Values:" list includes "All Salesmen", "Sy Fortig", "Phil Sturm", "Scott Ostro", "David Hertig", "Fil Gray", "Ayda Monbora", and "Customers". The "Selected Values:" list currently contains "All Salesmen". Between the lists are three buttons: a single arrow pointing right, a double arrow pointing right, and a single arrow pointing left. Below the "Available Values:" list is a text input field labeled "Enter a Value:" with a single arrow pointing right button to its right. At the bottom right of this section are "Remove" and "Remove All" buttons.

Enter Status Code: This section has a title "Enter Status Code:" and a label "Status Code" in the top right. It contains two list boxes: "Available Values:" and "Selected Values:". The "Available Values:" list includes "C", "D", "I", "I", "N", "R", "S", and "I". The "Selected Values:" list currently contains "P" and "S". Between the lists are three buttons: a single arrow pointing right, a double arrow pointing right, and a single arrow pointing left. Below the "Available Values:" list is a text input field labeled "Enter a Value:" with a single arrow pointing right button to its right. At the bottom right of this section are "Remove" and "Remove All" buttons.

At the bottom right of the entire dialog box are "OK" and "Cancel" buttons.

Report

Preview Design User Report Save Report

BusinessObjects

Preview

TSH Prospect Listing By Salesman 6/7/2007 Page

Salesman: Monique Amabile

Cust#	Status	Contact	# of Users	Lead Source	Next Step	Status Date
Customer Name		Industry		Competition		
City	State	Phone #	Ext.	Current System		
311000	B	Joseph Parayil		NJW HOLESALE		11/14/2007
Implex Corp Jersey City	NJ	Wholesale Distribution 201-792-1189				
<p>Notes: 5/21/2007 s/w Joseph and he can't s/w us now for they are moving I must touch base in six months. Contact: Joseph Parayil</p> <p>Notes: 5/17/2007 s/w Joseph again his brother is still out of the country I scheduled a call back. Contact: Joseph Parayil</p> <p>Notes: 5/8/2007 s/w Mr. Joseph Parayil the company is moving in two months and I need call back on Thursday May 17th to speak with his brother Philip. Contact: Joseph Parayil</p>						
311500	B	Jack Guarnieri		NJW HOLESALE		10/12/2007
PINBALLS Lakewood	NJ	Wholesale Distribution 732-354-9840				
<p>Notes: 6/4/2007 Spoke with Jack, who advise they are to small right now, but have doubled there sales last year and if they do the same they would have an interest. Keep him on our list. Contact: Jack Guarnieri</p> <p>Notes: 5/22/2007 S/W MR. GUARNIERI AND HE IS INTERESTED IN RECEIVING OUR E-MAIL BLAST. HE HAS SEVEN USERS HE MAY BE INTERESTED. I WILL FOLLOW UP IN TWO WEEKS. Contact: Jack Guarnieri</p>						
311600	B	Daniel Fu		NJW HOLESALE		10/18/2007
Wetstone Inc Hackensack	NJ	Wholesale Distribution 201-488-8282				
<p>Notes: 5/18/2007 I spoke with Sean Zhang who informed me that he received the package and they like our product. However they want me to touch base with them in 6 months. Contact: Daniel Fu</p> <p>Notes: 5/9/2007 s/w Mr. Sean Zhang Networking Engineer and per his request I sent out a package with an Intro letter. I also scheduled a call back. Contact: Daniel Fu</p>						
311658	B	Howard Powell		NJW HOLESALE		6/3/2007

Executive Inquiry Sales Summary

MDS for Windows Version 8.1.6 - [RS6000D.tshinc.com-DASC.12-EXEC.INQ011\$1]

File Edit Settings View Reset Tools GUI PCA Standard Functions Special Functions Help

COO: 01 The Systems House, Inc. EXECUTIVE INQUIRY SALES SCREEN

As of Date: 05/25/07

Customer	Orders	Sales	Day	M-T-D	Y-T-D
In Pick	0,402,007	Sales	125	125	14,027
Backord	713,547	Credits	-61,304	-61,304	-68,487
Future	5,000,125	Net Sls	61,179	61,179	51,159
Direct	1,265,153	Cost of Sls	16	16	3,602
On Hold	9,073,507	Gross Prof	-61,195	-61,195	-58,062
Total	04,462,729	CP Per	100.03	100.03	106.61

Accounts	Receivable	Invoiced	Day	M-T-D	Y-T-D
Current	339,215	Cash Recd	61,910	61,910	341,212
31-60	5,114	Write Offs		2,923	5,846
61-90	4,296	Adjustments		40	81
91-120	3,555,437	A/R Change		4,113,011	8,226,022
121-150	11,371	Avg Dly Sales			511
151 Ovr	2,932,265	Days in A/R			-1817
Future	10				
Total	983,178				

Enter F10 to exit: XXXXXX

PAGE 1 OF 3

Sales	Purch	Acctg	Op Stats	Sism Sum						
FHELP	OKEND	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	OK	Language Bar: Help	Popup

Sales Report Summary

MDS for Windows Version 8.1.6 - [RS6000D.tshinc.com-DASC.12-EXEC.INQ.SLSM.M-Y.TD01251]

File Edit Settings View Reset Tools GUI PCA Standard Functions Special Functions Help

Executive Inquiry - Salesman Summary
As of Fiscal Period Ending 07/05

Co# 01 The Systems House, Inc.

Salesman	Month to Date			Year to Date		
	Sales	Profit	GP%	Sales	Profit	GP%
000 HOUSE ORDERS	11111.10	6611.10	77.50	57010.23	35795.12	62.79
001 ISH	46930.00	6116.52	00.31	44543.83	56739.41	77.38
002 HUGHIE FORREST	0.00	0.00	0.00	0.00	0.00	0.00
003 LARRY MERAN	0.00	0.00	0.00	0.00	0.00	0.00
004 ROBERT PRATT	0.00	0.00	0.00	0.00	0.00	0.00
005 GIL SINCLAIR	0.00	0.00	0.00	0.00	0.00	0.00
006 JOHN TOMKINS	0.00	0.00	0.00	0.00	0.00	0.00
007 MORRIS EKSTROM	0.00	0.00	0.00	0.00	0.00	0.00
008 NICHOLAS GRACE	0.00	0.00	0.00	0.00	0.00	0.00
009 RICHARD MARINO	0.00	0.00	0.00	0.00	0.00	0.00
010 SAM CERBER	0.00	0.00	0.00	0.00	0.00	0.00
011 BENJI P	25.00	50.00	00.00	6149.40	5088.69	82.75
017 Steve West	0.00	0.00	0.00	0.00	0.00	0.00
111 David Fertig	0.00	0.00	0.00	0.00	0.00	0.00
Totals	49793.90	52556.42	05.55	380967.48	48866.45	-7.46

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

Sales	Purch	Acclg	Print Sum	Day/Month	Calls	INQUIRY	CANCEL	OFF	Popup
FHELP	OKEND	INSERT	LDELETE	PREV PG	NEXT PG				

Call Report

MDS for Windows Version 8.1.6 - [RS6000D.tshinc.com-24 DASH.12-EXEC.INQ.SLSM.CALLS01251]

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Executive Inquiry - Salesman Calls

As of Date: 05/25/07

Co# 01 The Systems House, Inc.

Salesman	Number of Calls			# of Initial Calls		
	Daily	MTD	YTD	Daily	MTD	YTD
000 HOUSE ORDERS	0	10	15	0	0	15
001 ISH	0	15	20	0	0	16
002 EUGENE FORREST	0	50	100	0	0	0
003 LARRY MERAN	0	0	0	0	0	0
004 ROBERT PRATT	0	0	0	0	0	0
005 GIL SINCLAIR	0	0	2005	0	0	57
006 JOHN TOMKINS	0	0	0	0	0	0
007 MORRIS EKSTROM	0	0	0	0	0	0
008 NICHOLAS GRACE	0	0	0	0	0	0
009 RICHARD MARINO	0	0	0	0	0	0
010 SAM CERBER	0	0	0	0	0	0
011 BENJI P	0	0	0	0	0	0
017 Steve West	0	0	0	0	0	0
111 David Fertig	0	0	0	0	0	0
Totals	0	80	2204	0	0	99

Enter END to Exit: XXXXXXXX

HELP	OK/END	INSERT	L/DELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	OFF	Popup
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Dashboard Key Performance Indicator

TSHPE2-DEMO12 - [192.168.253.135-demo.12-MENU]

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Calendar

12:45:09 PM

June 2007

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	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

Shortcuts

- Purchasing
- Inventory Warehouse Procedures

MENU on demo.12

- Order Entry and Invoicing
- Order Entry Reports
- Accounting Registers
- Accounts Receivable
- Price Maintenance/Price Books
- Costing/Inventory Evaluation
- Purchasing
- Inventory/Warehouse Procedures
- Physical Inventory Procedures
- Inventory Management
- Sales Analysis
- File Maintenance
- Accounts Payable
- General Ledger
- End of Day Processing
- End of Month Processing
- End of Year Processing

Back Home

Things to do

Date	Time	Description	Status
5/14/2007	8:00am	Run Purchasing Report for Cardinal	Past
5/15/2007	9:30am	Meeting with Pat Scott	Past
5/17/2007	9:00am	Expected Delivery of MedHealth shipment	Past

Key Performance Indicators

Indicator	Daily	Monthly	This Year	Last Year
Salesman Calls	34	662	5579	
Sales Dollars		\$250,027	\$1,240,500	

Salesman Calls

Category	Month to Date	Year-to-Date
001	~200	~2000
002	~200	~2000
003	~200	~200
004	~200	~1500

OE	CONTACTS	MAINT	DRILL	EXECINQ	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU	
HELP	OKEND	INSERT	DELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	OFF		Popup

CRM Summary - Benefits

- Better, more efficient management of Telemarketing efforts.
- Instant access to all relevant information
- Contact information is easily available throughout enterprise (MDS)

