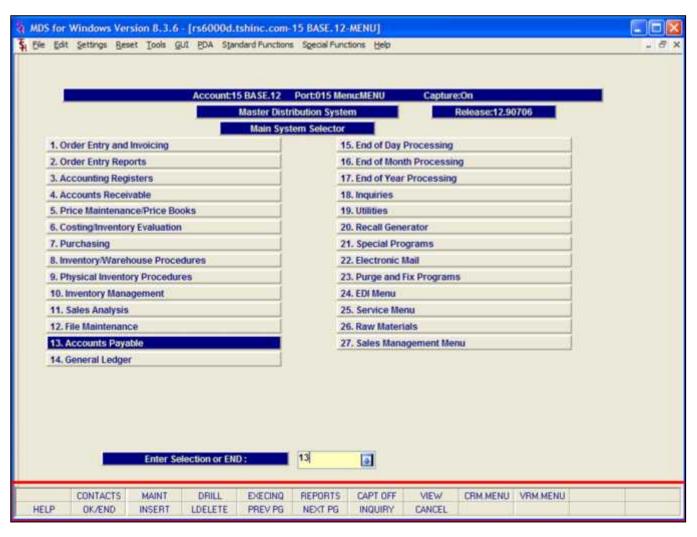
Customer Relationship Management (CRM) Guide

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

Notes:

CRM Training Guide

The following training guide is a User's Guide for CRM (Customer Relationship Management) on MDS for Windows.



Notes:			

Master File Maintenance Function Keys

The first 12 function keys on your keyboard (F1-F12) are reserved for special functions in the MDS master file maintenance programs. They appear on the last line of the screen as follows:

HELP - The HELP function is available by clicking on the 'HELP' icon or by pressing the <F1> function key. Help text is setup as two layers. By pressing 'F1' at the first field on the screen, an overall description of the master file will be displayed. If 'F1' is pressed at a specific field within the master file, a detailed description of the field and its' use will be displayed.

OK/END – The OK/END function is available by clicking on the 'OK/END' icon, pressing the 'F2' function key, or by typing in the word 'END' and hitting <ENTER>. This function key acts an 'accept' within a program. It will also takes you back a menu within menus.

INSERT – The INSERT function is available by clicking on the 'INSERT' icon or by pressing the 'F3' function key. The INSERT mode feature allows insertion of letters or numbers into existing text.

LDELETE – The LINE DELETE function is available by clicking on the 'LDELETE' icon or by pressing the 'F4' function key. The LDELETE function allows you to delete a line from the master file. Simply bring the cursor to the line you wish to delete, and click or press 'F4'.

PREV PAGE — The PREVIOUS PAGE function is available by clicking on the 'PREV PG' icon or by pressing the 'F5' function key. This function would be used for master files which contain multiple input screens, and will allow easy paging to additional screens. This function will be used simultaneously with the NEXT PG function to move back and forth between the screens.

NEXT PG — The NEXT PAGE function is available by clicking on the 'NEXT PG' icon or by pressing the 'F6' function key. This function would be used for master files which contain multiple input screens and will allow easy paging to additional screens. This function can be used simultaneously with the PREV PG function to move back and forth between the screens.

System Release:12.90706 ector 15, End of Day Processing 16, End of Month Processing 17, End of Year Processing	
15. End of Day Processing 16. End of Month Processing	
17. End of Year Processing	
18. Inquiries	
19. Utilities	
20. Recall Generator	
21. Special Programs	
22. Electronic Mail	
23. Purge and Fix Programs	
24. EDI Menu	
25. Service Menu	
26. Raw Materials	
27. Sales Management Menu	
	20. Recall Generator 21. Special Programs 22. Electronic Mail 23. Purge and Fix Programs 24. EDI Menu 25. Service Menu 26. Raw Materials

Notes:	

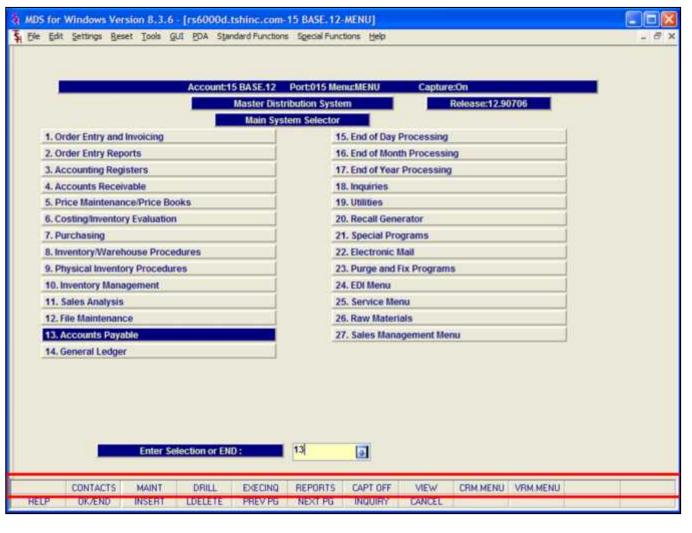
Master File Maintenance Function Keys

INQUIRY – The INQUIRY function is available by clicking on the 'INQUIRY' icon or by pressing the 'F7' function key. This function allows the operator the flexibility to display items in the master file already entered and to display other master files used within the file being created. Example: The Product Master file. At the first prompt for product number, if the operator clicks on the 'INQUIRY' icon or 'F7' is pressed the inquiry can be made to display products on file (to eliminate duplication). If you click on the 'INQUIRY' icon or press the 'F7' function key at another field, for example, product type (which is another master file) the system will display product types on file to help the operator in selecting which product type best fits the product being created. As you can see the inquiry function can be a very useful tool when creating or maintaining master files.

CANCEL – The CANCEL function is available by clicking on the 'CANCEL' icon or by pressing the 'F8' function key. This function is used to end a program without applying changes or additions made and should only be used if you DO NOT want the changes to be updated to the file. If used, the record will be filed as it was before the operator accessed it, in other words, as though no changes were made.

Off – The Off function is available by clicking on the 'Off' icon or by pressing the 'F9' function at any menu. This function will disconnect your session from WinMDS.

Popup – The Popup function is available by clicking on the 'Popup' icon or by pressing the 'F12' function key. This function will bring up a custom menu with personally specified menu options.



Notes:

Master File Maintenance Function Keys

The top row function keys on your keyboard <Shift>+(F1-F8) are reserved for special functions in the MDS master file maintenance programs.

These function keys change in each of the programs that you are in. For example, Product File Price Maintenance's top row of function keys will be different than Batch Price Changes – by Vendor's top row of function keys.

CONTACTS - The CONTACTS function is available by clicking on the 'CONTACTS' icon or by pressing the Shift+'F2' function key. This will bring the user to the Contacts inquiry.

MAINT - The MAINTENANCE function is available by clicking on the 'MAINT' icon or by pressing the Shift+'F3' function key. This will bring the user to the File Maintenance menu.

DRILL - The DRILL function is available by clicking on the 'DRILL' icon or by pressing the Shift+'F4' function key. This will bring the user to the Drill Down menu.

EXECINQ - The EXECUTIVE INQUIRY is available by clicking on the 'EXECINQ' icon or by pressing the Shift+'F5' function key. This will bring the user to the Executive Inquiry.

REPORTS – The REPORTS module is available by clicking on the 'REPORTS' icon or by pressing the Shit+'F6' function key.

CAPT OFF - The CAPTURE OFF function is available by clicking on the 'CAPT OFF' icon or by pressing the Shift+'F7' function key. This will disable all available reports from going to Report Capture.

VIEW - The VIEW function is available by clicking on the 'VIEW' icon or by pressing the Shift+'F8' function key. This will forward the user to Report Capture and display all reports previously ran.

CRM.MENU – The CRM.MENU function is available by clicking on the 'CRM.MENU' icon or by pressing the Shift+'F9' function key. This will forward the user to the Customer Relationship Management menu.

VRM.MENU – The VRM.MENU function is available

by clicking on the	'VRM.MENU'	icon or by pressing the S	hift+'F10' function key.	This will forward the user	to the Vendor Relationship Manage
menu.					



CRM Benefits:

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

Notes:			

CRM Parameter File

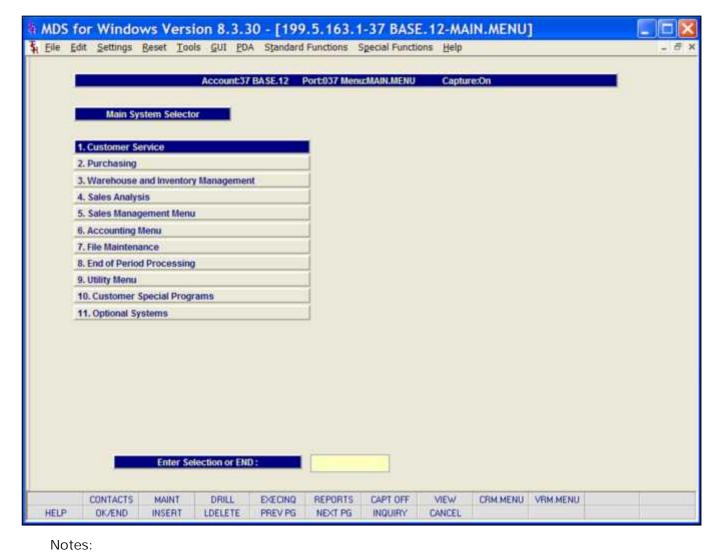
Before using MDS , your account analyst will set the following AR parameters.

We mention them here so you are familiar with them and their various effects on the AR module.

AR Related Parameter Records:

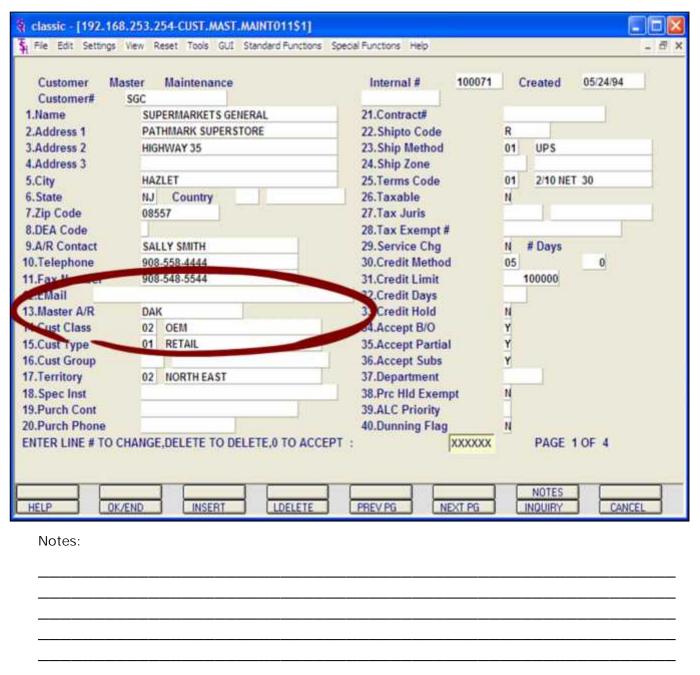
- 14. DUN.PERIOD Aging period dunning cycle should begin (1-6).
- 15. COMM Commission parameter based on sales (S) or gross profit ("Null").
- 16. COMM.FRT Indicates if actual freight should be subtracted from the commissionable amount (Y subtract, N or Null do not subtract).
- 86. AR.HIST.DYS Number of days to retain AR.HIST records.
- 107. COMM.PD.AR- PAID COMMISSIONS OPTION: 0 OR NULL no commissions by PAID AR, 1 commissions based on PAID AR (Update Open.Commission File)
- 119 CRED.CARD.IND CREDIT CARD MODULE INDICATOR
- I Interactive Mode
- N Not Used
- 126. AR.CHECK.REC AR DEPOSIT RECONCILIATION
- Y WILL USE AR.RECON FILE
- N WILL NOT USE THE AR DEPOSIT RECON
- 139. AR.AGE.BUCKET.USED- Aging bucket to use for A/R Overdue report.

NOTE: There are many Parameter files that affect the entire MDS system. These files are reviewed and set with your analyst prior to going live.



Main System Selector

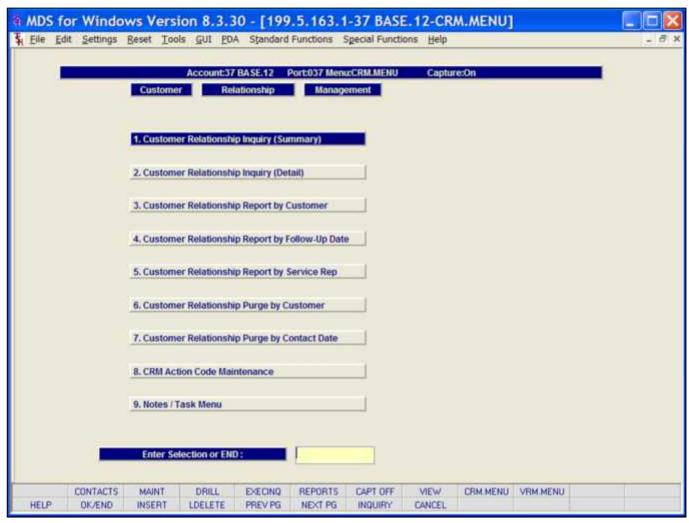
From the main system selector go into Accounting Menu, Accounts Receivable and then Customer Relationship Management.



Customer Master Maintenance

From the main system selector go into File Maintenance Menu, Customer Related Files Menu and then Customer Master Maintenance.

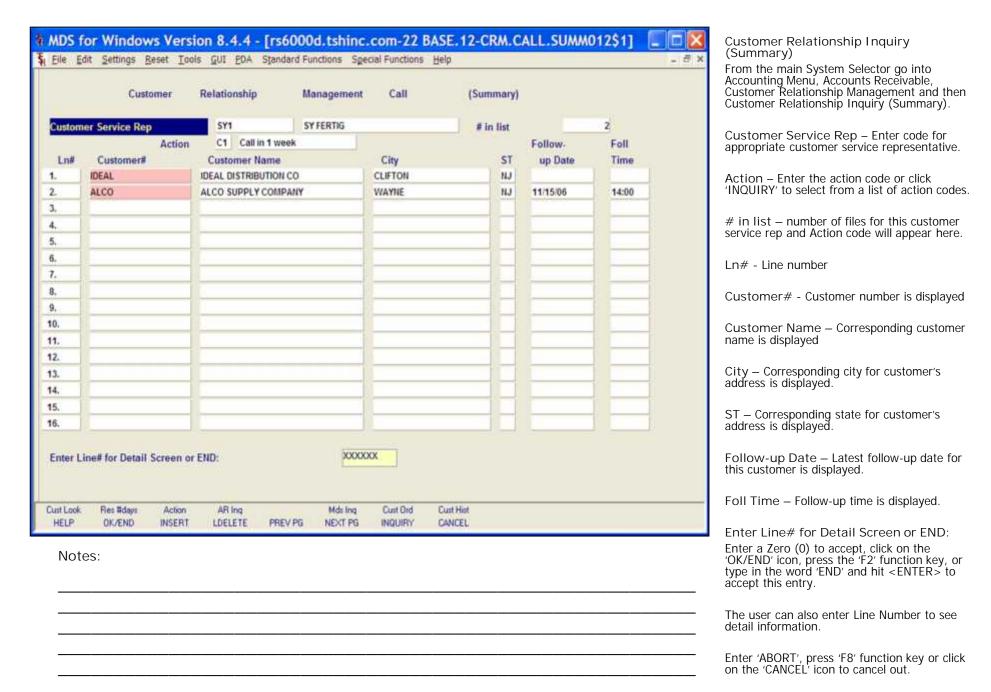
Master A/R - If A/R transactions generated by this account are to be posted to a customer's central billing office, or to a parent company, the customer ID of the central office or parent is entered here. The customer ID entered must already exist on the Customer Master file. This field is located in Customer Master Maintenance.



Main System Selector
From the Main System Selector go into
Accounting Menu, Accounts Receivable and
then Customer Relationship Management.

The CRM main menu includes all the phases of
CRM- the summary inquiry, the detail, reports,
purges maintenance and notes.

Notes:



ust	Customer omer# XA.	Relationship JA	Ma	Customer Notes Date	Co
Cred	lit Hold	Credit L	imit	CUSTOMER AJAX NOTES 11/0	5/02 ALL
	Name			EXTRAC AJAX NOTES 11/0	5/02 ALL
	Address1			test for comment 01/2	0/05 ALL
	Address2				
	Address3				
	City				
1.B	isiness				-11-11
6.	Oper	Date	Time		
W+	Contact	Date	Email		
	Topic	Inv#	Ret		
1.				Press any key to Continue ; XX Page	1 of 1
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	1				
ct			111		
2.			Test 1		
		100	a	0	-
				_	

Notes:

Customer Relationship Management Call (Detail)

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Customer Relationship Inquiry (Detail).

Customer# - Enter the customer number. You can enter the customer number or part of the customer number, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the correct customer.

After acceptance of customer code, active accounts receivable customer notes will appear.

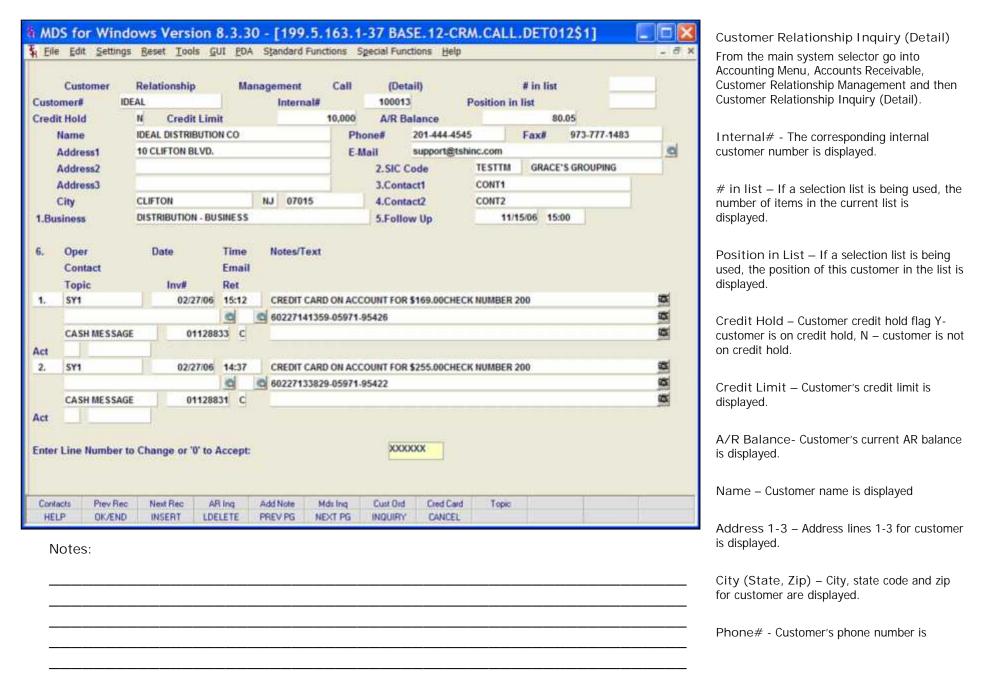
Customer Note – Customer notes are 1 line per message. Notes appear here.

Date – Corresponding date for customer note is displayed here.

Co – Corresponding company number for customer note appears here.

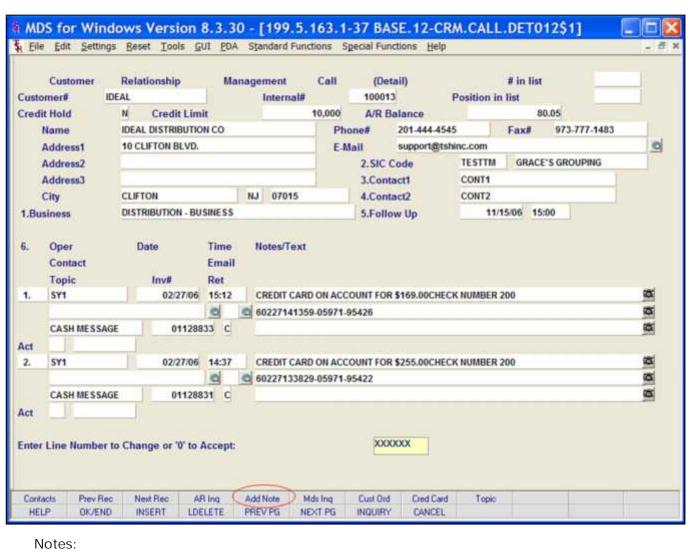
Press any key to continue:

Hit <ENTER> or any key to accept this screen and continue.



	Fax# - Customer's fax number is displayed.
	E-Mail – Customer's email is displayed.
Notes	

displayed.



Customer Relationship Inquiry (Detail)

SIC Code – SIC code assigned to this customer is displayed along with the corresponding description.

Contact 1 - First contact for this customer.

Contact2 – Secondary contact for this customer.

Follow Up – Follow-up date and time is displayed.

The next text fields go together and relate to the customer notes.

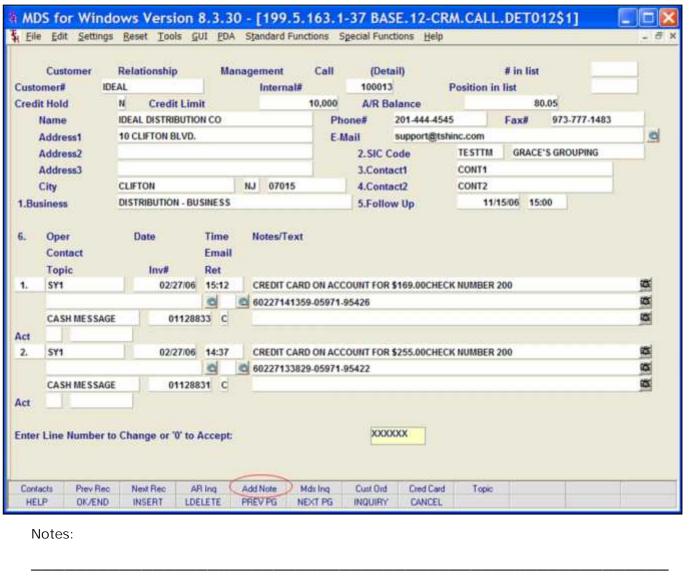
To add a new note click 'AddNote' function key or type CTRL-F5.

Oper – Operator code is displayed.

Date – Corresponding date is displayed.

Time – Corresponding system time for note entry is displayed.

Notes/Text – Customer note is displayed here



Customer Relationship Inquiry (Detail)

Contact – Customer note contact (if entered) is displayed here.

Email – Send email button and email confirmation button.

Topic – Topic entered for this note is displayed.

Inv# - Corresponding invoice number (if applicable) is displayed here.

Ret — The corresponding Retain Code is displayed here. Options are: Y for Yes, N for No, or C for Cash Message.

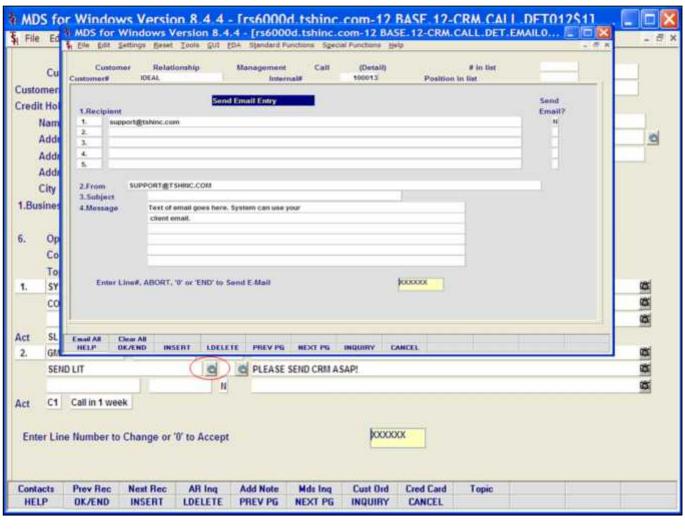
Act – The corresponding Action Code is displayed here. Note: Action codes are defined by your system manager an therefore will be different for every MDS system.

Enter Line Number to Change or '0' to Accept:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.



Notes:

Customer Relationship Inquiry (Detail)
Email

Email – Right click in first email button to display the email screen. Users can send emails directly from this screen.

Recipient – Emails on file for this customer are displayed. Users can enter an email address here.

Send Email? – If multiple emails are listed, change flag to "Y" for those recipients who should receive the email.

From - Enter your email here.

Subject - Enter subject for email here.

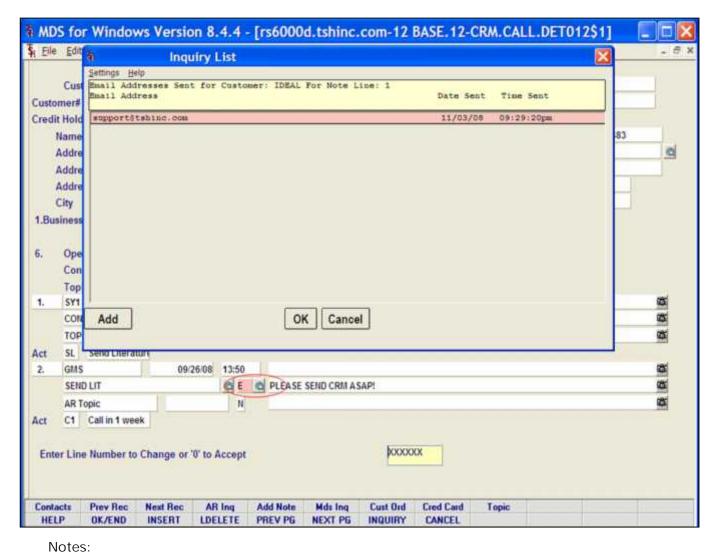
Message – Text of message goes here.

Enter Line#, ABORT, "0" or 'END' to Send E-Mail:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to send this email message.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

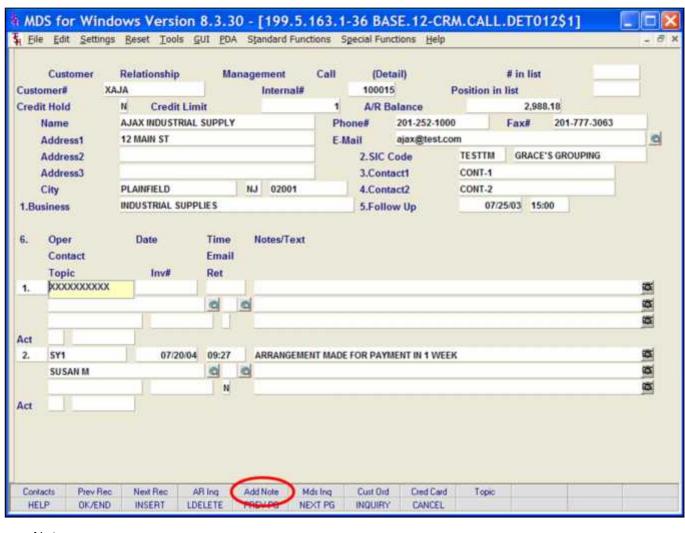


Customer Relationship Inquiry (Detail)

Second Email Button

Email Confirmation – After an email has been sent, users can click the second email button to display the email screen. This displayed the Email Confirmation screen which lists all emails sent

Click on the 'OK' button to accept this entry and return to the Customer Relationship Management Call Detail screen.



Notes:

Customer Relationship Management Call (Detail)

Add Note Function

The bottom nine fields on this screen go together and relate to the customer notes. To add a new note click on the 'Add Note' icon or press the Shift+ 'F5' function key.

Oper – Hit ENTER for your operator code.

Date – Hit ENTER for today's date or Click on the drop down box and select a date or enter date.

Time – Hit ENTER for current time or enter time.

Notes/ Text – Enter Note text here. The MDS editor box will be activated for editing the text.

Contact – Enter contact name here.

Email – Send email button and email confirmation button. The first button pops up the email screen to send a e-mail. The second button displayed a confirmation after the message is sent.

Topic – Enter topic for note here.

Inv# - Enter invoice number here (if applicable).

Ret - Retain code: Enter Y for Yes N for No or C for Cash Message.

Act – Action code- Enter action code or click 'INQUIRY' to select a code from the Action Code drop down.

	Customer	Relation	nship	Ma	nage	ment	Call	(De	tail)		# in list		
Custo	omer# II	DEAL				Internal#		10001	13	Position in	list		
Cred	it Hold	N C	redit Limit	KI.		1	0,000	A/R I	Balance		80.05	5	
	Name	IDEAL DI	STRIBUTION	CO			Pho	ne#	201-444-4	545	Fax# 9	973-777-1483	
	Address1	10 CLIFT	ON BLVD.				E-M	all	support@t	shinc.com	217		
	Address2							2.SIC	Code	TESTTM	GRACE'S	GROUPING	
	Address3							3.Con		CONT1			
	City	CLIFTON			NJ	07015		4.Con		CONT2	-	_	
1.Bu	siness	DISTRIBI	UTION - BUS	INESS				5.Foll	ow Up	11/1	15/06 15:00		
	CASH MESSAC	iE .	0112883	22 C	0 6	0227141359-	059/1-1	0420					9
Act	SY1		02/27/06	4,414					R \$255.00CH	CK NUMBER	200		100
Act 2.	211			d	0 6	0227133829-	05971-9	5422					200
		- 415											ia
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2. Act	CASH MESSAG	to Change	e or '0' to A	ccept:	Add	Note Mds	Inc	XXX		d Topic			

Notes:

Customer Relationship Management Call (Detail)

Function Keys

Contacts — The Contacts function is available by clicking on the 'Contacts' icon or by pressing the Shift+ 'F1' function key. This will bring the user to the Customer Contacts Inquiry.

PrevRec - The PrevRec function is available by clicking on the 'PrevRec' icon or by pressing the Shift+ 'F2' function key. This will bring the user back to the Previous Record in the CRM select list.

NextRec - The NextRec function is available by clicking on the 'NextRec' icon or by pressing the Shift+ 'F3' function key. This will bring the user to the Next Record in the CRM select list.

AR Inq - The AR Inq function is available by clicking on the 'AR Inq' icon or by pressing the Shift+ 'F4' function key. This will bring the user to the Accounts Receivable Inquiry.

Add Note - The Add Note function is available by clicking on the 'Add Note' icon or by pressing the Shift+ 'F5' function key. This will allow the user to enter a new CRM note using the bottom half of the CRM call detail screen.

MdsInq - The Mds Inq function is available by clicking on the 'Mds Inq' icon or by pressing the Shift+ 'F6' function key. This will bring the user to the MDS Inquiry Screen.

Cust Ord - The Cust Ord function is available by clicking on the 'Cust Ord' icon or by pressing the Shift+ 'F7' function key. This will bring the user to the Customer Order Inquiry.

Cred Card - The Cred Card function is available by clicking on the 'Cred Card' icon or by pressing the Shift+ 'F8' function key. This will bring the user to the Message Board Credit Card Entry screen.

MDS for Windows File Edit Settings Re					ACTS.INQ012	- 6 ×	Customer Relationship Management Cal (Detail)
			2 200 - 100V - 10				Contact Function Key
Customer# IDEAL	1	IDEAL DISTRIBUTI					From Customer Relationship Inquiry (Detail) click on the 'Contacts' icon or by press the Shift+ 'F1' function key.
A/R Phone 201	HARD GALVIN 444-4545 port@tshinc.com		Purch Contact Purch Phone				Customer# - The customer number and name will display or you can enter the customer number or part of the customer number, click on the 'INQUIRY' icon or press
Contact Name EMail Address		Description		Phone#	Ext Fax# Cell Phone#		the 'F7' function key which opens the pop-up inquiry box to search for the correct customer Customer Code and corresponding customer name are displayed.
				JI			A/R Contact – Customer's AR contact is displayed here.
							A/R Phone – Phone number for A/R contact is displayed here.
				Ji.			A/R Email – Email for AR contact is displayed here.
NTER LINE # TO CHANG	E,DELETE TO DELET	E,0 TO ACCEPT :		KXXXXX			Purch Contact – Purchasing contact is displayed here.
HELP OK/END	NSERT LDELETE	PREV PG NEXT	PG INQUIRY (CANCEL			Purch Phone – Purchasing contact's phone number is displayed here.
Notes:							Contact Name – Additional contact names are displayed here.
							Description – Corresponding description for

	Phone# - Corresponding phone number for additional contact is displayed here.
Votes	

ustomer#	DEAL	IDEAL DIS	TRIBUTION CO		
R Contact R Phone R EMail	RICHARD GALVIN 201-444-4545 support@tshinc.com	n	Purch Contact Purch Phone		
ontact Name Mail Address		Description		Phone#	Ext Fax# Cell Phone#
				N.	
ER LINE # TO C	HANGE, DELETE TO I	DELETE,0 TO ACCI	EPT :	KXXXXXX	

Customer Relationship Management Call (Detail)

Contact Function Key

Ext - Corresponding phone number for additional contact is displayed here.

EMail Address - Corresponding e-mail for additional contact is displayed here.

Fax# - Corresponding fax number for additional contact is displayed here.

Cell Phone# - Corresponding cell phone number for additional contact is displayed here.

ENTER LINE # TO CHANGE, DELETE TO DELETE, O TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by Y*** to delete an existing record.

Custo	Customer	Refe	ntionship	Ma	nagement	t C	all	(Det	700		Position in	# in list		-	-
	Hold	N	Credit Lir	nit	inter		.000		alance		OSIDON III		0.05	-	-0.
	Name	IDEA	L DISTRIBUTI				Pho			44-4545		Fax#	973-777-	1483	
1	Address1	10.0	LIFTON BLVD.	į.			E-Ma	ill	suppo	rt@tshir	nc.com	12.			0
	Address2							2.SIC C	ode		TESTIM	GRACE	'S GROUPIN	IG	
	Address3							3.Conta	act1		CONT1				
- 1	City	CLIF	TON	[]	NJ 07	015		4.Conta	act2		CONT2				
1. Business 6. Oper Contact Topic 1. SY1 CONT1 Act SL Send L 2. GMS SEND LIT		Date Time Notes/Text Email Inv# Ret 10:14:08 11:10 THIS IS A TEST BLEM IS OR IF T HAPPENS. Iterature 09/26:08 13:50 PLEASE SEND				S A TEST FI IS OR IF TH PENS.	1.Type M/C 2.Number 5555- 3.Name Laure 4.Exp Dt 120 5.Verify# 123 6.Address 10 CL 7.Zipcode 07015 8.Corp Cd N			5555-55 Lauren \ 1209 1234 10 CLIFT 07015	55-5555-5555-4444 uren Weisbergger 1209 1234 CLIFTON BLVD.				
Act		1 week	NSERT LE	DELETE	PREV PG	NEXT	En	omp# ter Line			The Systen to Accept		nc	a	

Notes:		

Customer Relationship Management Call (Detail)

Credit Card Function Key

From Customer Relationship Inquiry (Detail) click on the 'Cred Card' icon or by press the Shift+ 'F8' function key.

Type – Enter credit card type or click on the 'INQUIRY' icon to select a credit card type.

Number – Enter credit card number

Name – Enter name as it appears on the credit card.

Exp Dt – Enter the expiration date for the credit card.

Verify# - Enter the verification code.

Address – Enter the billing address for the credit card.

Zipcode - Enter the billing zip code for the credit card.

Corp Cd — Is this card a corporate card? Enter Y for Yes or N for No.

Amount – Enter amount to be charged.

Comp# - Enter company number or click 'INQUIRY' to select from a list of available companies.

Enter Line# To Change, 0 To Accept:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make

desired char	nges.		
Notes			
votes			

60						
DATE: 04 1	Nov 2008		custosa	R RELATIONSHIP REPOR	T PAGE: 1	
CUSTOMES #	COSTORER VALLE	LINE ENTRY DATE	POLLOW UP DATE	INIT CONTACT	NEESAGE	FRE
TOBAL PLEASE SE	IDEAL DISTRIBUTION CO	2 09/24/08		OHE SEND LIT		
DEAL	IDEAL DISTRIBUTION CO	29 03/14/03		er	CHERCIT CARD ON ACCOUNT FOR \$100.004AJ5940007	c
IDBAL	IDEAL DISTRIBUTION CO	22 03/23/03		17	CREDIT CARD OF ACCOUNT FOR \$200.003A24851311	e
IDEAL.	IDEAL DISTRIBUTION CO	4 02/27/06		ø	CHARLET CARD ON ACCOUNT FOR \$255.00CHECK WINNIE	
DEAL	IDEAL DISTRIBUTION CO	8 02/27/06		a	CHEDIT CARD ON ACCOUNT FOR \$0.00CHBCK WINNIER	¢
IDBAL	IDEAL DISTRIBUTION CO	9 02/23/06		ø	CHEDIT CARD OF ACCOUNT FOR \$150,000KECK HOMES	
DEAL.	IDEAL DISTRIBUTION CO	5 02/27/06		er	CHREST CARD OR ACCOUNT FOR \$100.00CHECK WINNER	
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TORAL	IDEAL DISTRIBUTION CO	14 07/01/03		se com:	CHEDIT CARD ON ACCOUNT FOR \$500.003A31315354	c
IDEAL.	IDEAL DISTRIBUTION CO	6 02/2T/06		er	CHEET CARD ON ACCOUNT POR \$10000.00CHECK MIN	200
DEAL	IDEAL DISTRIBUTION CO	13 07/01/03		ur.	CREDIT CARD OR ACCOUNT FOR \$700.004A30254241	e

Notes:		

Customer Relationship Report – by Customer

This report shows CRM messages by customer. It lists Customer Number, Customer Name, Line number (for note), Entry Date, Follow Up Date, Initials, Customer Contact Information, Massage and the retain flag.

Customer# - In this field the operator has the option of selecting 'All Customers', 'Customer Range' or 'Specific Customer'. For Customer Range or Specific Customer

enter the customer number.

Oper Initials – In this field the operator has the option of selecting 'All Operators', 'Operator Range' or 'Specific Operator'.

Follow Up Date- In this field the operator has the option of selecting 'All Dates', 'Date Range' or 'Specific Date'.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

DATE: 04 N	ov 2008	Ι	Service Re FOLLOW UP				PAGE: 1
CUSTOMER#	CUSTOMER NAME		CONTACT	FOLLOW UP DATE	INIT	CONTACT	LINECOMMENTS RET
ANN	ANN'S GARDEN N		11/03/09	11/13/09	G45	Ann	1 she wants a week to think it over
ALCO	ALCO HOLDINGS INC		11/05/09	11/13/00	5Y	Кіп	1 get credit card for outstanding balance
IDEAL	IDEAL CORP		11/03/09	11/13/00	SY	ndoc	1 will send partial this week
)R	JR CORP		11/03/09	11/13/00	SY	Seth	1 wants a call in 2 weeks
ľ							

Customer Relationship Report by Follow-Up Date

This report shows CRM notes by follow up date. It lists Customer Number, Customer Name, Contact Date, Follow-up Date, Operator Initials (customer rep) Customer Contact Name and comments. It also shows the retain flag at the end of each line.

Follow Up Date - In this field the operator has the option of selecting 'All Dates', 'Date Range' or 'Specific Date'.

Cust Serv Rep – In this field the operator has the option of selecting 'All Customer Service Reps', 'Customer Service Rep Range' or 'Specific Customer Service Rep'.

Customer# - In this field the operator has the option of selecting 'All Customers', 'Customer Range' or 'Specific Customer'.

For Customer Range or Specific Customer enter the customer number.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

Notes:

DATE: 04 N	iov 2008	CRM FO Service Rep: FOLLOW UP DA	ALL	REPO	ORT by Service R	tep	PAGE: 1	
CUSTOMER#	CUSTOMER NAME	CONTACT FO	OLLOW P DATE :	INIT	CONTACT	LINE	COMMENTS	RET
1020	COLUMBIA*PRESBYTERIAN	11/03/08 1	1/02/08 :	SF	TOM	1	SENDING SALES POWERPOINT	N
ANN	ANN'S GARDEN	11/03/08 1	1/03/08 (3×5		1	she wants a week to think it over	N
APB	APB DISTRIBUTING, INC	07/10/08 0	4/01/08	SF.		1	CREDIT CARD ON ACCOUNT FOR \$556.67	N
CONNIE	CONNIE'S SUPPLY	09/15/08		SF	JANE	1	NEW CUSTOMER	N
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08	3	SF		1	CREDIT CARD ON ACCOUNT FOR \$100.00 CHECK NUMBER V54A2696754?	c
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08		SF		2	CREDIT CARD ON ACCOUNT FOR \$133.00 CHECK NUMBER V54A26967400	C
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08		SF.		3	CREDIT CARD ON ACCOUNT FOR \$333.00 CHECK NUMBER V53A26967241	c
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08		23	JANE	4	TEST	Ç
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08		SF	LAURA	5	CREDIT CARD ON ACCOUNT FOR \$277.00 CHECK NUMBER V53A26966988	c
IDEAL1	IDEAL DISTRIBUTION CO	03/27/08	3	13	JOE	6	OVERDUE CHARGING CARD	γ
JR.	JULIANNE TEST	11/03/08 1	1/03/08	SLS	LISA	1	tried to call, call again in 1 week	N
KPL	David's Holding Inc.	12/28/08 1	2/28/08	(PL	3UN0	1	initial call	N
KPL	David's Holding Inc.	01/20/09 0	1/13/09	cp1	MARY	2	called for credit card payment	N
MAB	MABIS HEALTH	09/26/08		SF.		1	discussed topic	N
MAB	MABIS HEALTH	09/26/08		TEY	THIS ONE	2	follow up call in 1 month	N
MAB	MABIS HEALTH	09/25/08	,	IAB.	AR CONTACT3	3	FINAL ADDITION	N
MAB	MABIS HEALTH	09/19/08	- 3	SF	AR CONTACT 2	4	ADDED credit card info to file	N

Notes:			

Customer Relationship Follow Up Report by REP

This report shows follow up notes by service rep. it lists Customer Number and Name, Contact date and Follow-up Date, Service rep/operator initials, Customer Contact, Comment and the Retain flag.

Cust Serv Rep – In this field the operator has the option of selecting 'All Customer Service Reps', 'Customer Service Rep Range' or 'Specific Customer Service Rep'.

Follow Up Date - In this field the operator has the option of selecting 'All Dates', 'Date Range' or 'Specific Date'.

Customer# - In this field the operator has the option of selecting 'All Customers', 'Customer Range' or 'Specific Customer'.

For Customer Range or Specific Customer enter the customer number.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

		Purge CRM file - Spec	elfic Customer	Capture:On	
. Customer#	IDEAL		IDEAL DISTRIBUTION CO		
	-				
Press <return> to I</return>	Process Report, Line	# to Change, or ABORT		pooxxx	
Press <return> to I</return>	Process Report, Line	to Change, or ABORT		XXXXXX	

Customer Relationship Purge by Customer

This process will delete all notes for the specific customer if the retain flag is set to ${\sf N}$.

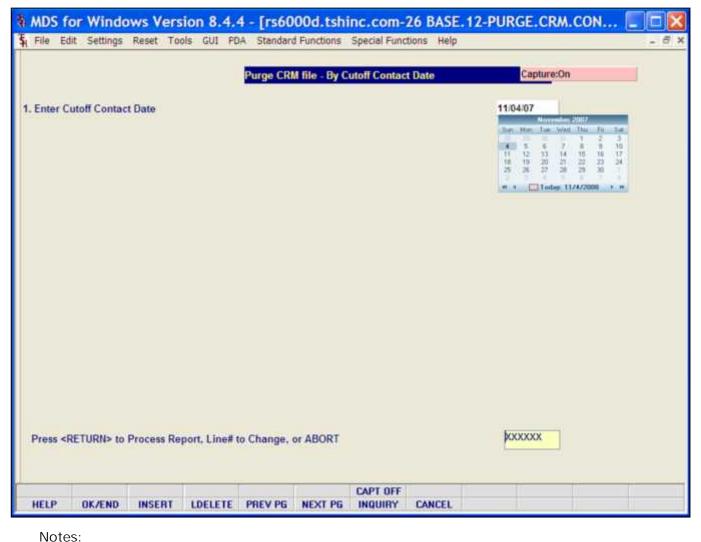
Customer# -Enter the customer number. You can enter the entire customer number or part of it, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the correct customer.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to PURGE.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

NOTE: This will purge CRM records for this customer. There is no report produced.



Customer Relationship Purge by Contact Date

This process will delete all notes specified by contact date if the retain flag is set to ${\sf N}$.

Enter Cutoff Contact Date – Enter the cutoff date for contact for this purge. Click on the drop down box and select a date or enter date format 'DDMMYY'.

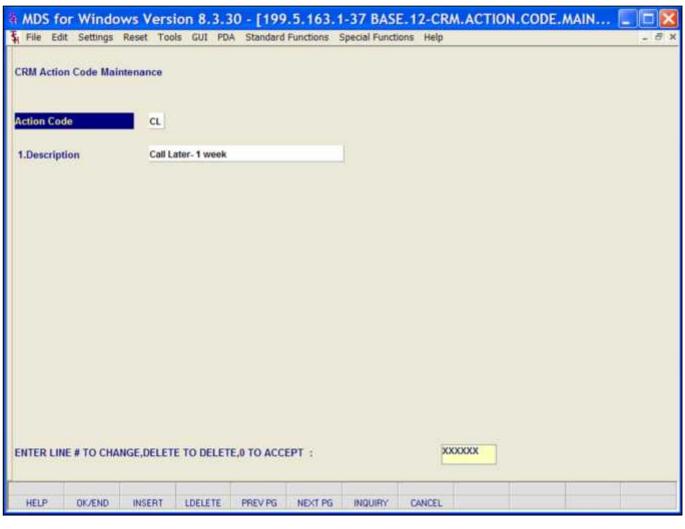
Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to PURGE.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

NOTE: This will purge CRM records for this customer. There is no report produced.

MDS Customer Relationship Management Training Guide



Notes:

CRM Action Code Maintenance
This maintenance is utilized to create or
maintain action codes.

Action Code – Enter a new or valid action code, you can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu for you to select from the available action codes.

XX not on file, Create it (Y/N) – If it'a a new action code type "Y" to create a new action code.

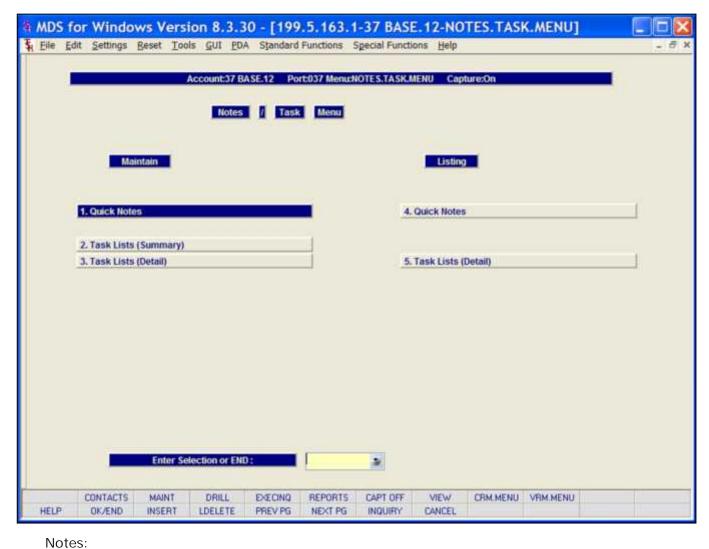
Description – Enter corresponding description for this action code.

ENTER LINE# TO CHANGE, DELETE TO DELETE, '0' to Accept:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.



Notes/ Tasks Menu

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Notes/Task menu.



Ouick Notes Maintenance

This maintenance is utilized to create or maintain quick notes.

Note Key – Enter the 2 digit Note Key or click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu for you to select from the available note keys.

Note – Corresponding note for this note key will display here.

ENTER LINE# TO CHANGE, DELETE TO DELETE, '0' to Accept:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

		Tasi	k Lists Entry	(Summary	1)				
Operator	i I		SY FERTIG			A	llow Y	# in list	4
Respons	ibility				To	-			
Custome	r/Prospect	ID.	EAL		To	IDEAL.			
	spect Name								
Priority (To				
ue Date	T				To				
escripti									
itatus C	ode				To				
state					To				
ustome	r Class				To				
	2002	220	22 11/2				V 22 - 5250	120 100	120.00
Ln#	TaskID 0000082 Gr	Respons	Cust/Pro	spect	Nan	RIBUTION CO	Due.Date	Description	Stat
1.	0000084 SF		IDEAL		A STATE OF THE PARTY OF	RIBUTION CO	10/16/06	Arrange demo date new system	ABC
3.	0000084 SF		IDEAL		The second second second	RIBUTION CO	11/10/08	Budget Meeting	OPN
	0000238 iis	200	IDEAL			RIBUTION CO	12/01/08		OPN
5.	00002336	115	IUEAL		IDEAL DIST	RIBUTION CO	12/01/08	Put together powerp	OPN
6.			-				1		
7.							1		
8.									
	to the part		a una proper de la constante d	E POR			lvs	OOXXX	11 11
Enter L	ine# for Deta	ii or S to Ch	ange Sear	in Criteria			~	NAAA .	
Search HELP	Add Tasks	meror	LOCIETE	DOCY DC	NEW DE	IMPAUDIA.	CANCEL		
	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL		

Task Lists (Summary)

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Notes/Task menu, then Task Lists (Summary).

The system maintains a task list by operator. This inquiry allows you to search tasks by various criteria. Entry of F2 after any search criteria fields will initiate the search with criteria entered to this point. The selected tasks are displayed in summary mode. The operator can then drill down to obtain detailed information on each listed task.

Operator – The current operator entering this this search will be filled in here.

Allow – Allow this operator to look at any tasks regardless of which operator is assigned or entered this task? Hit ENTER for default (Y) or enter "Y" for yes or "N" for No. If a Y is entered, at least one search criteria must be entered.

Responsibility (2 fields) – Enter starting and ending name for the person that is responsible.

Customer/ Prospect (2 fields) – Enter starting and ending Customer or Prospect code.

Cust/ Prospect Name – Enter any part of the customer/prospect name.

Priority Code (2 fields) – Enter starting and ending priority code (1-99) for this search.

Due Date (2	fields) – Enter starting and	d ending due date for search.	Click on the drop down box	x and select a date or enter	date format 'DDMMYY'.
es					
					

		Ta	sk Lists Entry	(Summary	n)					
Operator			SY FERTIG			A	llow Y	# in	list	4
Responsi	bility				To					
	r/Prospect	- 11	DEAL		To	DEAL				
	spect Name									
Priority C					To					
Due Date					To					
Descripti					100					
Status Co	ode				To					
State			_		To					
Custome	Class				To					
Ln#	TaskID	Respons	Cust/Pro	snect	Nan	ne	Due Date	Des	scription	Stat
1.	0000082 GM		IDEAL	Median.		RIBUTION CO	10/16/06		e demo date	OPN
2.	0000084 SF		IDEAL		IDEAL DIST	RIBUTION CO	10/16/06	new sy		ABC
3.	0000238 lisa	Na.	IDEAL		IDEAL DIST	RIBUTION CO	11/10/08	Budget	Meeting	OPN
4.	0000233 GM	5	IDEAL		IDEAL DIST	RIBUTION CO	12/01/08	Put tog	ether powerp	OPN
5.										
6.										
7.	Ī									1 1
8.										
Enter L	ine# for Detail	or S to C	hange Searc	ch Criteria			X	OOOOX		
	Add Tasks								li li	
Search	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL			

Task Lists (Summary)

Description – Enter any part of the description for this search.

Status Code (2 fields) – Enter starting and ending status code for this search. You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu for you to select from the available status codes.

State (2 fields) – Enter starting and ending State Code for this search. You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu for you to select from the available States.

Customer Class (2 fields) – Enter starting and ending Customer Class code for this search. You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu for you to select from the available Customer Classes.

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

Enter a line number to see task detail, "S" to change search criteria and search again.

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

		Task Lists Entry	Summary)						
perator		SY FERTIG			Allov	w Y	# in	list	.4
lesponsi	bility		To						
ustome	r/Prospect	IDEAL	To	IDEA	(V)				
ust/Pros	spect Name								
riority C	ode		To						
ue Date			To						
escripti	on								
tatus Co	ode		To						
tate			To	V.					
ustome	Class		To						
Ln#	TaskID Respon	ns Cust/Prosp	ect	Name	D	ue.Date	Des	cription	Stat
1.	0000082 dr.15	IDEAL	IDEA	L DISTRIBU	TION CO 1	0/16/06	Arrange	e demo date	OPN
2.	0000084 9	IDEAL	IDEA	L DISTRIBU	TION CO 1	0/16/06	new sy	stem	ABC
3.	000023815a	IDEAL	IDEA	L DISTRIBU	TION CO 1	1/10/08	Budget	Meeting	OPN
4.	0000233 GMS	IDEAL	IDEA	L DISTRIBU	TION CO 1	2/01/08	Put tog	ether powerp	OPN
5.									
6.									
7.									
8.					1				
Enter L	ine# for Detail or S to	Change Search	Criteria			XX	XXXXX		
_									
Search	Add Tasks				QUIRY CA	ANCEL			
Carrie	AMTurk				ENGINEERS THE	Calmer			

Task Lists (Summary) Functions

Drill Down – To access the drill down capabilities of this inquiry, click on the 'TaskI D'. This will take the operator to the detailed information for this task.

Function Keys:

Search – The Search function is available by clicking on the 'Search' icon or by pressing the 'F1' function button. This function will clear the current data and allow you to perform another search.

Add Tasks – The Add Tasks function is available by clicking on the 'Add Tasks' icon or by pressing the 'F2' function button. This function takes the user to the Task List Detail screen to enter a new task.

MDS for Windows Version 8.4.4 - [rs6 File Edit Settings Reset Tools GUI PDA Stands	000d.tshinc.com-26 BASE.12-TASK.LISTS.ENTR	Task Lists (Detail) From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Notes/Task menu, then Task Lists (Detail).
Task ID 0000238 1.Operator	Position in list SYFERTIG	This screen allows you to enter and maintain tasks by operator.
2.Responsibility lisa 3.Customer/Prospect IDEAL 4.Priority Code 5 5.Status Code OPN AG	IDEAL DISTRIBUTION CO	Task ID- Enter a valid task ID or press the down arrow for the next available Task ID number.
6.Description Budget Med	nting mmittee together	Operator – The current operator entering this this task will be filled in here. Responsibility – Enter a name of person
5. 8.Due Date / Start Date	onthly of the Month of the Month-2 Last Record of	responsible for this task. Customer/ Prospect — Enter Customer or prospect code for this task. You can enter the customer number or part of the customer number, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the correct customer.
14.Complete (Y/N) N O	ACCEPT Original Task?	Priority Code – Enter a number for priority code 1-99.
Prev Rec Next Rec HELP OK/END INSERT LDELETE PREV PO	NEXT PG INQUIRY CANCEL	Status Code – Enter a valid status code or click on the drop down box to select from a list of status codes.
		_ Description – Enter short description for this task (50 characters)
		Notes - Enter notes associated with this task

			Task Lists	Entry (Deta	ii)		n	sition in	# in list			
	Task ID	000	0238					isidon in	Het	-		
1.Opera	Control of the Control					SY FERTIG						
Marie State	nsibility			lisa								
NAME OF THE OWNER, WHEN	mer/Prospec	t		DEAL		IDEAL DIST	RIBUTION CO					
4.Priorit	William Street, Street, Square, St. Co., London, St. Co.,			5		2 skirkuntskiskiprekintn		27				
5. Status				OPN ACT	TIVE PROSPE	СТ						
6.Descri	iption			Budget Meeting								
7.Notes	Water County			Alternative and reducing the photographs	nmitee togeth	er						
			2.	Discuss fall I	budget							
			3.									
			4.									
			5.									
8.Due D	ate / Start D	ate		11/10/08 08:00am B Billionthly								
9. Start	Time											
10.Recu	rring Task											
11.Endin	g Date of Ta	rsk		11/30/10	2010							
12.Day o	f Week / Mo	nth		15 Day o	of the Month							
13.Day o	of Month-2			30 Day o	of the Month-2	9		Last	Record of			
14.Comp	elete (Y/N)			N Ori	ginal Task II	D			inal Task?			
ENTER L	INE # TO CH	IANGE,DEL	ETE TO DEL	ETE,0 TO A	CCEPT		boo	XXX				
	Next Rec	Inanco	110101011011	THE PARTY OF THE	7745	102022707070	PENGLUCIA					
rev Rec HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL					

Task Lists (Detail)

Due Date / Start Date — Enter Due date if this is NOT a recurring task, Enter start date if this is a recurring task. Click on the drop down box and select a date or enter date.

Start Time – Enter Start time for this task in half hour increments.

Recurring Task — Enter recurring task code or click on the 'INQUIRY' icon or press the 'F7' function to choose from a list of available recurring task codes . Options are: "D" — Daily, "W" — Weekly, "M"- Monthly, "B" — BiMonthly, "Y" — Yearly. If this is not a recurring task enter "N".

Ending Date of Task – For recurring tasks, enter ending date of task. Click on the drop down box and select a date or enter date.

Day of Week/ Month — If you are using this task to create a recurring task, then enter a valid day of the week or day of the month (whichever is applicable) for the type of recurring task entered. Enter a recurring task day code or click on the 'INQUIRY' icon or press the 'F7' function to choose from a list of available days of the week. For days of the week, options are: "1-5" — Monday- Friday. If "M", "B" or "Y" was entered in the recurring

task field, then you must enter a valid day of the month 1 to 31.

Day of Month–2 – If this task is a bimonthly task enter the second Day of the month here.

	Task L	ists Entry (Detai	I)			# in	list	
	- Committee				Po	sition in list		
Task ID	0000238							
Operator				SY FERTIG				
Responsibility		lisa						
Customer/Prospect		IDEAL		IDEAL DISTR	IBUTION CO			
Priority Code		5		220				
Status Code		The same of the sa	IVE PROSPE	CT				
Description		Budget Meeti	Section in concession in Fig.					
Notes	1.	First get com		er				
	2.	Discuss fall b	udget					
	3.							
	4.	-						
Due Date / Start Date	5.	11/10/0						
Start Time		08:00am	3					
		B Biffor	e Plaka					
Recurring Task Ending Date of Task		11/30/10	itrity	_				
.Day of Week / Month			f the Month		-7			
.Day of Month-2			f the Month-2) :		Last Rec	ord of	
.Complete (Y/N)			ginal Task II			Original		
ITER LINE # TO CHANGE	DELETE TO	and the same of th	CONTRACTOR STATE		boxo	Committee of the Part of the P	10001	
TER CINE # 10 CHARGE	WELL IV	DECEMBER 10 A	- Carlot					
Rec Next Rec								
LP OK/END INSE	RT LDELE	TE PREV PG	NEXT PG	INQUIRY	CANCEL			
(100 marks)								
Notes:								

Task Lists (Detail)

Complete (Y/N) – Is this task complete "Y" for Yes, "N" for No.

Original Task ID – The original task ID will display.

ENTER LINE# TO CHANGE, DELETE TO DELETE, O TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can enter Line Number to make desired changes on the header screen.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

	PAGE	1 **QUICK NOTES LISTING** DATE 01:32:41pm 04 Nov 2008	
Ι	QUICK.N	NOTES NOTES	
	CB	Call Back Later	
	N1	NOTE-1 Initial contact note	
	N2	NOTE-2 Second contact note	
	N3	NOTE-3 Third contact note	
	PR	PRIORITY	
	4 recor	ds listed.	
Si .			
	Notes:		

Quick Notes Listing

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Notes/Task menu, then Quick Notes Listing.

This report will give you a listing off all Quick Note Codes and the corresponding note.

There are no selection criteria.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.

	TA	OK L	ISTS REPORT		0	1:32:55pm	1 04 Nov 2009 TAGE:	1				
TASK. ID	ORIO TASK ID		RESPONS	A.CUST.NO M	ri.	DUB.DATE START.DT	DESCRIPTION	. STAT.CODE	STAT.DATE	REC		NK. HIL/
0000080		STI	CDASS	GRACE.		10/16/06	PRODUCT GUIDE	ABC	10/16/06	н		
0000081		SYL	CHS	CRACE	1	12/17/07	TEST	55	12/17/07	N		
0000082		STL	CDHS	IDEAL		10/16/06	Arrange demo date	029	11/04/08	H		
0000083		571	CHIS	GRACE		10/16/06	THT		10/16/06	N		
0000084		STI	SF	IDEAL	1	10/16/06	new system	ABC	11/04/08	M		
0000085		STI	CD4S	GRACE		10/16/06			10/16/06	N		
0000087	00000081	SYL	OHS	GRACE		10/16/06	TROT		10/16/06	H		
0000088	0000081	SYL	CHS	GRACE		10/17/06	TROT		10/16/06	Ж		
0000089	0000061	SYL	CMS	GRACE		10/18/06	TRUT		10/16/06	H		
0000090	0000081	STI	OHS	CRACE		10/19/06	TROT		10/16/06	N		
0000091	0000081	SYL	CHIS	ORACE		10/20/06	TEST		10/16/06	Ж		
0000092	0000002	STI	OMS	CRACE		10/16/06	TESTINO		10/16/06	м		
0000093	0000082	STI	CHIS	CRACE		10/23/06	TESTINO		10/16/06	M		
0000094	0000082	STL	ONS	GRACE		10/30/06	TESTINO		10/16/06	н		
0000095	0000082	SYL	CHS	GRACE		11/06/06	TESTINO		10/16/06	H		
0000096	0000082	STL	CHS	ORACE		11/13/06	TESTINO		10/16/06	H		
0000097	0000083	SYL	COHES	GRACE		10/16/06	THY		10/16/06	ж		
0000098	0000083	STL	CHS	GRACE		11/16/06	TRY		10/16/06	H		
0000099	0000083	STL	OHS	GRACE		12/16/06	THT		10/16/06	и		
0000100	0000084	271	OMS	GRACE		10/16/06	TEST 1		10/16/06	H		
0000101	0000084	SYL	CHS	GRACE		10/20/06	TEST 1		10/16/06	ж		
0000102	0000084	SYL	CHS	GRACE		11/16/06	TROT 1		10/16/06	H		
0000103	0000084	STI	CDHS	ORACE		11/20/06	TROT 1		10/16/06	и		
0000104	0000084	SYL	CHS	GRACE		12/16/06	TEST 1		10/16/06	и		
0000105	0000005	STL	CHIS	GRACE		10/16/06			10/16/06	H		
0000106	0000085	SYL	CHIS	GRACE		10/16/07			10/16/06	H		
0000107	0000085	STL	OHS	GRACE		10/16/08			10/16/06	н		
0000122	0000081	SYL	CHS	GRACE	1	12/20/07	TRST	55	12/17/07	×		
0000125		STL	david			08/22/08	Call Prospect david	CEN	08/01/08	H		
0000233		STL	CHS	IDEAL	1	12/01/08	Put together poverpoint for	OTH	09/25/08	Ж		
0000238		571	lisa	IDEAL	5	11/10/08	Budget Heeting	CER	11/04/08	В	11/30/10	15/30
31 1000	rds list	nd.										

Notes:			

Quick Notes Maintenance

From the main system selector go into Accounting Menu, Accounts Receivable, Customer Relationship Management and then Notes/Task menu, then Task List (Detail) Listing.

This report shows all tasks for the selected task operator, status code and status date combination. It lists Task ID number, Operator code, person Responsible, Customer Number, Priority, Due date/ Start Date (for recurring tasks), Description, Status Code, Status Date, Recurring task status, End Date, Day of the week and day 2 (for bimonthly recurring vouchers).

Task Operator - In this field the operator has the option of selecting 'All Task Operators', 'Task Operator Range' or 'Specific Task Operator'.

Status Code – In this field the operator has the option of selecting 'All Status Codes', 'Status Code Range' or 'Specific Status Code'.

Status Date - In this field the operator has the option of selecting 'All Status Dates', 'Status Date Range' or 'Specific Status Date'.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Click on the 'ABORT' icon or press the 'F8" function key to abort out of the report.



Where to Get More Information

- Additional Training Sessions
- Place a support call on CRS system: http://crs.tshinc.com/
- Call The Systems House, Inc. at 973-777-8050

our documentation department at:	
documents@tshinc.com	

Please send any comments on this guide to

More Information

Notes:			