#### **Increasing Your Sales with MDS**

#### **TSH User Meeting**

June 11, 2012





#### **Overview- MDS Sales Tools**

- Direct Fulfillment
- Consignments to Customer
- Memorized Orders/Standing Orders
- Ship Complete/Invoice Complete/Monthly Billing
- Targeting Potential Sales
- Prospect Tracking
- Email Blasting

#### **Direct Fulfillment**

- Allows you to ship to your customer's customers
- Custom forms & labels with your customer's logo and packing documents





# **Selecting Ship To Location**

	t <u>I</u> ools <u>G</u> UI Stardard Function	ns Special Functions Help				- 8
Order Entry Header Order#141819	9 Date 06/04/12		)1 Sell V mpany NEW	Whse 001 YOEK, NY	Ship Whse NEW YORK, NY	001
CONVERSE.	OTTG		Ship-To 1.			
SCOTT G MEDICAL 123 MAIN STREET	Inquiry List Settings Help MDS SHIP TO LOOKUP SHIPTO CUSTOMER	NAME	СІЛА	ST ZIP		000
DALLAS Cust Class (	R - REPEAT			31 211		
2.Req Dt	D00001 SCOTIG 145 Main St		New Paltz	NY 25761		
3.As of Dt 4.Terms 5.Source	DOODO2 SCOTIG 459D East H	John Smith, Inc. older Str Suite 23	Pinebrook	NY 22198	ć	
6.Cust PO# 7.Direct 8.Spec Ins						
9.Caller 10.Ship Via 11.Cash						
12.M/Bill	Add	[	OK Cancel			

# **Selecting Ship To Location**

	t <u>I</u> ools <u>G</u> UI Stardard Function	ns Special Functions Help				- 8
Order Entry Header Order#141819	9 Date 06/04/12		)1 Sell V mpany NEW	Whse 001 YOEK, NY	Ship Whse NEW YORK, NY	001
CONVERSE.	OTTG		Ship-To 1.			
SCOTT G MEDICAL 123 MAIN STREET	Inquiry List Settings Help MDS SHIP TO LOOKUP SHIPTO CUSTOMER	NAME	СІЛА	ST ZIP		000
DALLAS Cust Class (	R - REPEAT			31 211		
2.Req Dt	D00001 SCOTIG 145 Main St		New Paltz	NY 25761		
3.As of Dt 4.Terms 5.Source	DOODO2 SCOTIG 459D East H	John Smith, Inc. older Str Suite 23	Pinebrook	NY 22198	ć	
6.Cust PO# 7.Direct 8.Spec Ins						
9.Caller 10.Ship Via 11.Cash						
12.M/Bill	Add	[	OK Cancel			

# **Selecting Ship To Location**

<u>File</u> Edit Settings <u>R</u> eset <u>T</u> ools <u>G</u> UI Stardard Functions Special Functions <u>H</u> elp
Order Entry Header Company 01 Sell Whse 001 Ship Whse 001 Order# 141819 Date 06:04/12 TSH Medical Company NEW YORK, NY NEW YORK, NY
Bill Ship-To Customer SCOTTG 1.
SCOTT G MEDICAL Inquiry List
123 MAIN STREET
MDS SHIP TO LOOKUP           SHIPTO CUSTOMER         NAME         CITY         ST ZIP
DALLAS
Cust Class 0
D00001 SCOTIG Dr Jim Stockton New Paltz NY 25761
2.Req Dt 145 Main Street
3.As of Dt D00002 SCOTIG John Smith, Inc. Pinebrook NY 22198
4.Terms 459D East Holder Str Suite 23
5.Source
6.Cust PO#
<sup>7.Direct</sup> Scott G Medical is doing direct fulfillment for their
8.Specins
Customer's ship to location in order entry, MDS
will print packing documents as though the
shipment came from Scott Medical.
Add OK Cancel

# Selecting template of shipping label

- 8 ×

🙀 Elle Edit Settings Reset Iools GUI Standard Functions Special Functions Help

Ship To Maintenance										
Customer #	SCOT	ſG	SCO	OTT G MEDI	CAL					
Ship To #	000002					19.Pick Priori	ty			
1.Ship To Name	John S	Smith, Inc.				20.DEA#				
2.Ship To Addr1	4590 E	ast Holder St	eet			21.DEA Expire	s			
3.Ship To Addr2	Suite 2	23			-	22.License#				
4.Ship To Addr3						23.Lic Exp. Da	nte			
5.City	Pinebr	ook				24.Drug Type		1	-	
6.State	NY	Country	000	U.S.A.				2		
7.Zip Code	22193		8.DE/	A Code				3		
9.Ship Method						25.Phone#				
10.Ship Zone						26.Res'Com		С		
11.Special Instr						27.Ship Label	Template	200 010		
12.Tax Juris,	005	OUT OF	STATE			ScottMedical-	PackingLabe	l.pm		
13.Tax Exempt #						Template N				
14.Service Whse						ScottMedic ScottMedic	al-Facking al-Packing	ist.prn		
15.GLN Number										
16.Primary Route		Sto	р							
				· · · · · · · · · · · · · · · · · · ·						
17.Secondary Route		Sto	р							
		x - 051 - 905			_					
18.Attention	Mr. Jo	hn Smith								
HELP OK/END	INSERT LI	DELETE PI	REVPG	NEXT PG	INQUIRY	CANCEL	Off			rfile Popup
UNER ONER			LVPU	MCAT PU	INCONT	CANCEL	01			Popup

# Selecting template of shipping label

- 8 ×

🙀 Elle Edit Settings Reset Iools GUI Standard Functions Special Functions Help

Ship To Mainter	nance				
a construction of the second second	omer#	SCOTTG	se	OTT G MEDI	ICAL
Ship	To #	000002	192		19.Pick Priority
1.Ship To Name		John Smith,	Inc.		20.DEA#
2.Ship To Addr1		4590 East Ho	lder Street		21.DEA Expires
3.Ship To Addr2		Suite 23			22.License#
4.Ship To Addr3					23.Lic Exp. Date
5.City		Pinebrook			24.Drug Type 1
6.State		NY Cou	intry 00	0 U.S.A.	2
7.Zip Code		22193	8.DI	EA Code	3
9.Ship Method					25.Phone#
10.Ship Zone					26 Res'Com C
11.Special Instr					27.Ship Label Template
12.Tax Juris.		005 0	UT OF STATE		ScottMedical-PackingLabel.pm
13.Tax Exempt #		1: JN			Template Name
14.Service Whse					ScottMedical-PackingList.prn ScottMedical-PackingList.prn
15.GLN Number		12 - 13			
16.Primary Route			Stop		
17.Secondary Rou	ite		Stop		In setting up the packing documents,
					TSH will create the template for the
18.Attention		Mr. John Sm	ith		
					shipping forms. You will then only have
					to select the template for that Ship to
					location Maintenance.
HELP OK	insert	LDELETE	PREVPG	NEXT PG	INQUIRY CANCEL Off Popup

# Drop shipping for your Customer with their Packing Slip

Edit Settings Reset Toos GUI Standard Functions Special Functions Hep

File

Customer #	SCOTT	G	SCO	FT G MEDICAL			
Ship To #	000002				19.Pick Priority		
1.Ship To Name	John Si	mith, Inc.			20.DEA#		
2.Ship To Addr1	4590 Ea	nst Holder Stre	et		21.DEA Expires		
3.Ship To Addı2	Suite 23	3			22.License#		
4.Ship To Addı3					23.Lic Exp. Date		
5.City	Pinebro	ook			24.Drug Type	1	
6.State	NY	Country	000	U.S.A.		2	
7.Zip Code	22198		8.DEA	Code		3	
9.Ship Method					25.Phone#		
10.Ship Zone				1	26.Res/Com	С	
11.Special Instr		er m			27.Ship Label Template		
12.Tax Juris.	005	OUT OF S	TATE		ScottMedical-PackingL	abel.prn	
13.Tax Exempt#					28.Pack Slip Template		
14.Service Whse					ScottMedical-PackingLi	st.prn	
15.GLN Number					Template Name		
16.Primary Route		Stop			ScottMedical-Packi ScottMedical-Packi	ngLabel.prn nolist.ncm	
17.Secondary Route		Stop	) (				
18.Attention	Mr. Joh	in Smith					

E X

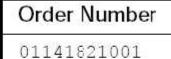
#### Packing Slip

Page: 1



SCOTT MEDICAL SUPPLY INC.

Shipping Document



Ship-to: 000002

John Smith, Inc. 4590 East Holder Street Suite 23 Pinebrook NY 22198

Orde	er Date:		06/04/12		ě.					-0.		
Requ	uired Da	te:	06/04/12	Ship Via:	OUR TR	UCK		Ro	oute:			
Can	cel Date	¢.		Customer	Order #:	9990		1999				
Orde	er Taker	10	SY FERTIG	Caller:		SO						
Licen Spec Instru	ise: ial ictions:	N E	xp:		DE	A#:						
Line	Loc	cation	Item Num	ber / Description	0	rdered	UM	Shipped	UM	B/O Qty	Unit Price	UM
1	0300B		17100 UNIVERSAL PRE	CAUTION KIT		2	EA	2	EA	0	0.0	OCEA

#### **Consignments to Customer**

- Allows you to place merchandise in your customer's hands for sale
- Tracks what is still in your customer's hands until sold or returned
- Automatic Billing when you are notified of end-user sale

#### **Order Entry for Consignment**

💃 Eile Edit Settings Reset Tools GUI Standard Functions Special Functions Help - 5 × **Order Entry Header** 01 Sell Whse Ship Whse Company 001 001 TSH Medical Company NEW YORK, NY 141794 Date Order# 05/27/12 NEW YORK, NY Bill Ship-To 1. SCOTTG Customer SCOTT & MEDICAL Country 000 SCOTT G MEDICAL Country 000 U.S.A. U.S.A. 123 MAIN STREET 123 MAIN STREET TX TX DALLAS 07013 DALLAS 07013 HOSPITALS 004 INHOUSE SALES Cust Class 01 Salesman 2.Req Dt N Bikt Ν 1. Cons/Rent С **Return Date** 06/28/12 05/28/12 Future 3.As of D1 x 춻 Inquiry List 01 4.Terms **NET 30** Settings Help CUSTOMER 5. Source 01 ACCEPTABLE VALUES : 6.Cust PO# 9990 Vendor C Consignment 7.Direct R Rental 8. Spec Ins Exp N Normal 9.Caller 50 10.Ship Via UPS 01 Ν 11.Cash N 12.M/Bill

#### Help for setting Return Date

🙀 Eile Edit Settings Reset Toos GUI Standard Functions Special Functions Help

01 Sell Whse 001 **Order Entry Header** Company Ship Whse 001 141794 Date Order# 05/27/12 TSH Medical Company NEW YORK, NY NEW YORK, NY Bill Ship-To SCOTTG 1. Customer SCOTT G MEDICAL 000 SCOTT G MEDICAL 000 Country Country U.S.A. 123 MAIN STREET U.S.A. 123 MAIN STREET TX DALLAS 07013 DALLAS 07013 TX HOSPITALS Salesman 004 INHOUSE SALES Cust Class 01 C 06/28/12 N 2.Reg Dt 05/28/12 Future N Blkt 13.Cons Rent **Return Date** 3.As of Dt 14.Inv Comp N 🐐 GENERAL HELP 4.Terms 5.Source It the order is a consignment or rental order enter the End Help 6.Cust PO# return date for the items or 'RETURN' for 30 days after the required date system default. 7.Direct Inquiry 8.Spec Ins Exp 9.Caller **10.Ship Via** 11.Cash 12.M/Bill MDS ING AR IND SALES MGT CRM ORD/HOLD CUSTNOTE ORDNOTE CUSTOMER HELP OK/END INSERT LDELETE PREV PG NEXT PG INQUIRY CANCEL Off Popup

- 8 X

#### **Consignment Inquiry by Item**

🙀 File Edit Settings Reset Tools GUI Standard Functions Special Functions Hep

Consignments Item Open by Description **Item Number** Price Um Cost Um Retail Um 3105.000/ EA NS01102-700 EKG MACHINE AT-2PLUS ITRP EA 5253.000/ EA Sel Whs Loc BO D Stk OnHand **On P/O B/O** Avail Future Intran ALL NEW Y Ν EA 40 25 EA 10 Substitutes 1. 2. Consignment# Ln# ConLn# Ord Date Price OnCons InPick Open Billed Customer Name Due Date PrcOvr D/SShipFrom Fut 1 01000005 001 05/27/12 5253.000 5 5 MEDICAL ASSOCIATES OF 05/28/12 ND Ν 001 Z 01000006 001 05/27/12 5253.000 5 5 N SCOTT G MEDICAL 05/28/12 ND 001 3 4 5 5 Totals Value 5253.000 XXXXXX Enter END to exit. NEXT PG or PREV PG HELP OK/END INSERT LDELETE PREV PG NEXT PG INQUIRY CANCEL Off Popup

- 6 ×

#### **Consignment Detail Inquiry**

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

onsi usto	jnment# ner#	01-000005 MERCYCIND		ase# 01	1417990 TES OF	and a	Order Date Due Date	e 05/27/12 05/28/12	_
n#	ltem Nur Descripti Vendor I	on		Consigned DropShip		InPick ShipFrom SellUm	Open Disc% Department	Billed Price Value	F H T
1	NS01102	-700		5 /	EA	/ EA	5 / EA	/ EA	Ņ
	EKG MA	CHINE AT 2PLUS ITRP			ND	001		5253.000/ EA	Contraction of the
					a	EA		26265.00	Y
2					_				-
	-				( <b>1</b>			Aug.	1-
3						1	/	1	
								1	1_
4					<b>n -</b>			1	-
	1			1				1	1-
nter	END to exi	it, NEXT PG or PREV PG	•		kxxx	XXX			

- 5 X

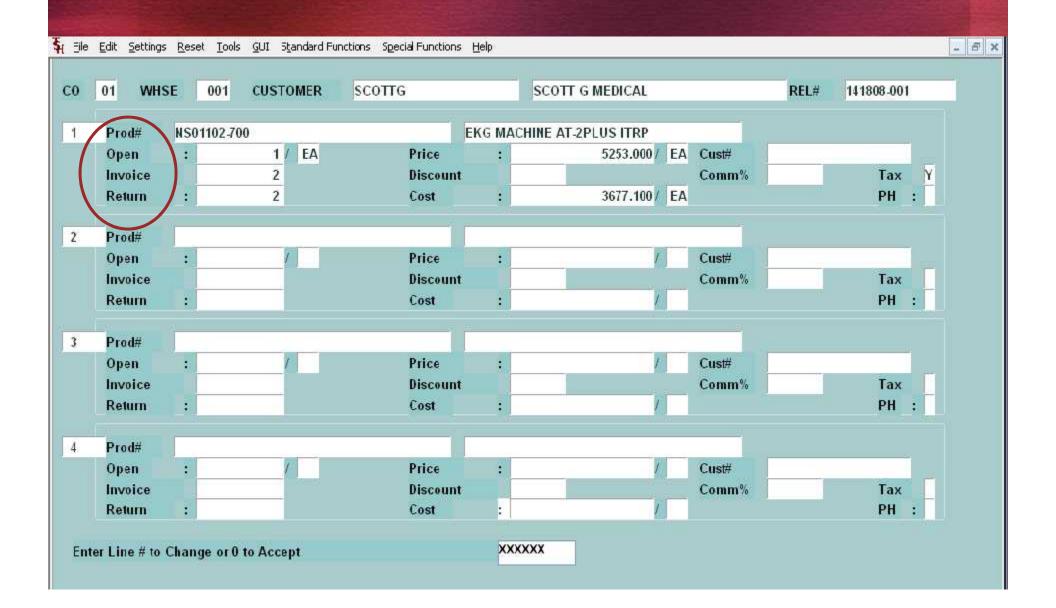
# **Completing the Consignment**

辑 📴 Edit Settings Reset Cools GUI Standard Functions Specia Functions Help

~		TOUL	00000000000	ignment	Header	Input				
Company	01	TSH Medica	Company		Sell Whse	00	1 NEW YORK	G NY		Consign# 000006
ill To	SCOT	rg.	-		1.Ship	Го				000000
COTT G ME			1 12		and the second se	G MEDICAL				Release#
23 MAIN ST						N STREET			-	141808-001
										Date
ALLAS		TX	-	07013	DALLAS		TX		07013	
5.Ship Via 7.Terms 3.Spec Ins 9.Order Sou 0.Cust PO#	IFCe	01 01 1111	UPS NET 30 01 CU	STOMER PHO	NE IN					
		and the second								
1.Monthly B	sini.	N								
er Line# to	Change,	DELETE to De	lete,0 to Ac	cept				(		
INQ. A	RINQ							1		
ELP OI	K/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off		Popu

- 5 ×

#### Identify the Items sold or returned



# Invoicing goods used

<b>Ş</b>	TSH Import Company 1033 ROUTE 46 CLIFTON, NJ 07013 Tel: 973-777-8050		/0	ć	CLI	mit To: Import ROUTE FTON, N 973-777-	Company 46 J 07013 8050	0	v Number 1519286 e: 1
123	TG T G MEDICAL MAIN STREET AS TX 07013			Shi	p-to	SCOTT	G MEDICAL AIN STREET S TX 0701	3	D1 SY
nvoice Date: Ship Date: Our Order No: Special nstructions:	05/29/12 05/29/12 01141508001	Salesmar Ship Via: Customer Terms:		UP: n #: 111	3	E SALES			
1 NS01102	HINE AT-2PLUS ITRP AL	Ordered 5	UM EA	Shipped 2	EA	B/O Qty 1	Unit Price 5253.000	UM EA	Extension \$10,506.00 10,506.00 \$10,506.00

#### **Open Consignments**

CO CUSTOMER	CONS# CON DATE RTN	EATS PRODUCT#	DESCRIPTION	SERIAL# 0	RD QTY	OPN QTY	VALUE	COST	
1 MERCYCIND	000005 05/27/12 07/	15/12 WS01102-700	SKG MACHINE AT-29LUS		5	5	26265.00	18385.	50 01
** TOTALS FOR	CONSIGNMENT NUMBER 00	0005			5	5	26265.00	18385.	50
*** TOTALS FOR	CUSTOMER# MERCYCIND	MEDICAL ASSOCIATES OF		2 <del>9</del>	5	5	26265.00	18385.	50
1 SCOTTG	000006 05/27/12 07/	1C/12 NS01102-700	BKG MACHINE AT-2PLUS		5	5	26265.00	18385.	50 00
	CONSIGNMENT NUMEER 00	귀엽 양 다 걸 것 같은 것을 알았는 것 같아요. 또			5	5	26265.00	18385.	50
** TOTALS FOR	CUSTOMER# SCOTTG	SCOTT G MEDICAL		57	5	5	26265.00	18385.	50
1 SJU	000002 01/11/06 01/	31/06 RSPATROL	ROSS PATROL ENTERAL	VARI	1	1	45.50	25.	00 00
*** TOTALS FOR	CONSIGNMENT NUMBER 00	0002			1	1	45.50	25.	00
** TOTALS FOR	CUSTOMER# SJU	SP. JOHN'S UNIVERSITY			1	1	45.50	25	00
1 UHS	000003 07/02/06 08/	2C/06 RSCOMP	ROSS COMPANION BUTTER	105	1	ા	40.00	300	00 00
	CONSIGNMENT NUMEER DO				1		40.0C	30.	00
*** TOTALS FOR	CUSTORER# UHS	UNIVERSAL HOSPITAL SER	VIC	62	1		40.00	30.	
*** TOTALE POR	CCHENNY# 01			9 <del>7</del>	12	12	52615.50	36326.	00
*** FINAL TOTAL	s					9	52615.50	36326.	00

#### **Recurring Sales/ Memorized Orders**

- Customers who order on a regular basis- obtain list for internal salesperson to call and obtain orders
- Shows which items have previously been bought
- Flexible assignment of re-order cycle

#### **Creating A Recurring Order**

Bill		-		Ship-To				
Customer	SCOTTG			1.	1			
SCOTT G MEDI	CAL	Country	000	SCOTT G MED	ICAL		Country	000
123 MAIN STRE	ET	U.S.A.		123 MAIN STR	EET		U.S.A.	
DALLAS	TX	07013		DALLAS		TX	07013	4
Cust Class	01 HOSPITALS			Salesman	004 INHC	USE SALES	5	
						<b>\$</b>	Inquiry List	
.Req Dt	05/28/12 Futu	ire <mark>N</mark> Blkt	N	13.Cons/Rent		te <u>S</u> ettings <u>H</u>	1997	
3.As of Dt				14.Inv Comp	N	ACCEPTA	BLE VALUES :	
I.Terms	01 NET 30			15.Ship Comp	N	D Dai	1 17	
5.Source	01 CUSTOM	ER PHONE IN		16.Cancel/Exp Dt		W Wee		
6.Cust PO#				17.Ord Hold	ΥF		thly	
.Direct	Vendor			18.LIC#		-	rterly	
B.Spec Ins				19.Dea#			monthly	
).Caller	PHONE			20.Route		S Sem	i annual	
0.Ship Via	01 UPS			21.Dly Stop		L Lis	t Specific Dates	<b>k</b> //
1.Cash	N			22.Frt Class		N Nev	er	
2.M/Bill	N			23.Frequency				
	the second s			•				

		То	To						
ustomer#	То								
ustomer Name									
ext Order Dt	05/27/12 To	06/28/12							
rder Date	То							# In	List
requency	Operator								5
									Last
Ln#Facility	Quote Customer Num	ber Customer Name	Amount Fr	Order Dt	Next Dt	Contact	Phone#	Conv	Conv Ord
1.	01100302 MERCYIC	MERCY HOSPITAL	63.30 M	05/27/12	06/27/12			N	
2.	01100301 MARCOW	MICHAEL MARCOW	42.48 M	05/27/12	06/27/12			N	
3.	01100298 SCOTTG	SCOTT G HEDICAL	142.50 M	05/27/12	06/27/12			H	
4.	01100295 UMC	UNIVERSITY MEDIC	4732.00	04/24/12	05/28/12	JULIANNE RAUCO	212-555-1213	H	
5.	01100300 UMC	UNIVERSITY MEDIC	2.09 M	05/27/12	06/27/12	JULIANNE RAUCO	212-555-1213	N	Au-
6.								1	
7.	1								
8.									
9.								1	
0.									
1.	1	i i							

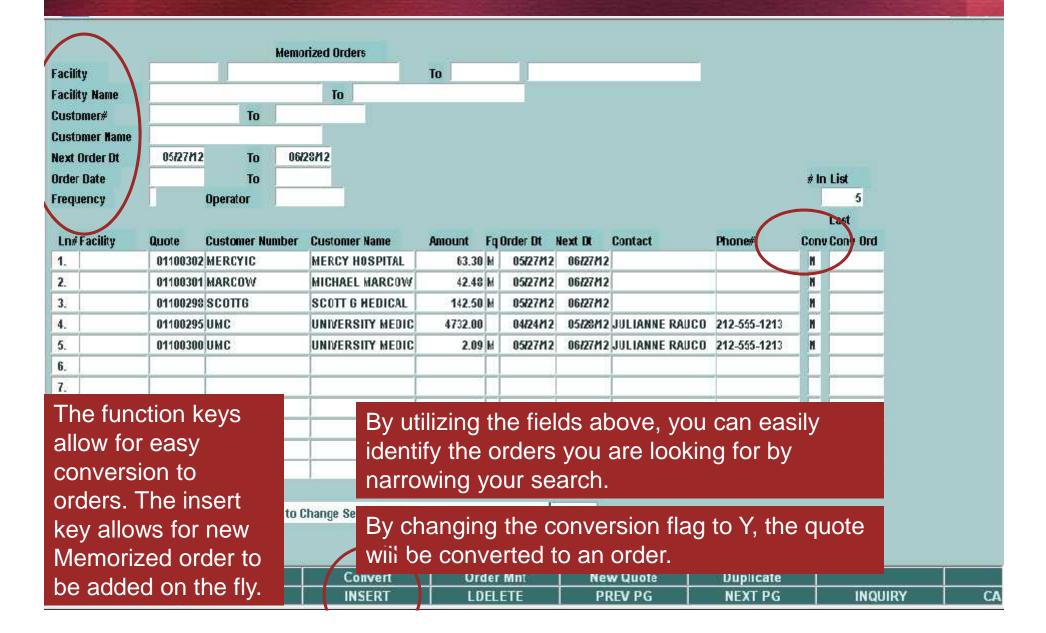
Search	Quote Mnt	Convert	Order Mnt	New Quote	Duplicate		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CA

$\frown$	Memo	orized Orders							
acility			То						
cility Name		To							
istomer#	То								
ustomer Name									
ext Order Dt	05/27/12 To 06	28/12							
rder Date	То							# li	n List
equency	Operator								5
									Last
Ln# Facility	Quote Customer Number	Customer Name	and the second se		and the second	Contact	Phone#	Con	v Conv Ord
l	01100302 MERCYIC	MERCY HOSPITAL	63.30 M	05/27/12				N	
	01100301 MARCOW	MICHAEL MARCOW	42.48 M	05/27/12	06/27/12		i	N	
	01100298 SCOTTG	SCOTT G MEDICAL	142.50 M	05/27/12	06/27/12			H	
	01100295UMC	UNIVERSITY MEDIC	4732.00	04/24/12	05/28/12	JULIANNE RAUCO	212-555-1213	H	
	01100300UMC	UNIVERSITY MEDIC	2.09 M	05/27/12	06/27/12	JULIANNE RAUCO	212-555-1213	N	
		Durit	11:i 41	<u>f</u> -					
ç (		By ut	ilizing tr	ne fiel	as ar	oove, you	can eas	sily	
0.		identi	fv the o	orders	vou	are lookin	ha for bv		
1.			•				3 ,		
		nano	wing yo		arcri.				
nter Line#to C	hange Next Order Date, or S to I	Change Search Criteria		k	00000				
					00				
Search	Quote Mnt	Convert	Order	Mnt	Net	w Quote	Duplicate		
HELP	OK/END	INSERT	LDEL	ETE	PF	REV PG	NEXT PG		INQUI

$\frown$	Memo	orized Orders								
Facility			То							
Facility Name		То								
Customer#	То									
Customer Name										
Next Order Dt	05/27/12 To 06/	28/12								
Order Date	То							# In List		
Frequency	Operator							5		
								Last		
Ln# Facility	Quote Customer Number	Customer Name	Amount Fq	Order Dt	Next Dt	Contact	Phone#	Conv Conv Ord		
1.	01100302 MERCYIC	MERCY HOSPITAL	63.30 M	05/27/12	- interneticed			1		
2.	01100301 MARCOW	MICHAEL MARCOW	42.48 M	05/27/12	06/27/12			8		
3.	01100298 SCOTTG	SCOTT G MEDICAL	142.50 M	05/27/12	06/27/12			N		
4.	01100295UMC	UNIVERSITY MEDIC	4732.00	04/24/12	05/28/12	JULIANNE RAUCO	212-555-1213	И		
5.	01100300UMC	UNIVERSITY MEDIC	2.09 M	05/27/12	06/27/12	JULIANNE RAUCO	212-555-1213	N		
6.			1.							
7.										
8.		Dyrut	الاستان م							
9.						oove, you		шу		
10.		identi	fy the o	rders	you	are lookin	ig for by			
11.			wing yo				0			
		Папо								
Enter Line#to Ch	ange Next Order Date, or S to I	Change Se During la		46.0.0				au eta		
		By cr	langing	the c	onve	rsion flag	to r, the	quote		
		will b	e conve	erted t	o an	order.				
Search	Quote Mnt	Convert	Urder	Mint	Nev	w Quote	Duplicate			
HELP	OK/END	INSERT	LDEL	ETE	PF	LEV PG	NEXT PG	INQU	IRY	CA

$\frown$	Mem	orized Orders								
Facility			То							
Facility Name		То		-						
Customer#	То									
Customer Name										
Next Order Dt	05/27/12 To 06	128/12								
Order Date	То							# In List		
Frequency	Operator							5		
Ln# Facility	Quote Customer Number	Customer Name	Amount Fq	Order Dt	Next Dt	Contact	Phone#	Conv Conv Ord		
1.	01100302 MERCYIC	MERCY HOSPITAL	63.30 M	05/27/12	06/27/12			H		
2.	01100301 MARCOW	MICHAEL MARCOW	42.48 M	05/27/12	06/27/12			N		
3.	01100298 SCOTTG	SCOTT G HEDICAL	142.50 M	05/27/12	06/27/12			H		
4.	01100295 UMC	UNIVERSITY MEDIC	4732.00	04/24/12	05/28/12	JULIANNE RAUCO	212-555-1213	N .		
5.	01100300 UMC	UNIVERSITY MEDIC	2.09 M	05/27/12	06/27/12	JULIANNE RAUCO	212-555-1213	N		
6.	1									
7.										
8.		D		- Cal						
9.						oove, you				
10.		ident	ify the c	orders	vou	are lookin	ng for by			
11.			wing yo				5			
		nano	wing-yc		arcri.					
Enter Line#to C	nange Next Order Date, or S to	Change Se Dynak				roion fl <del>or</del>				
						rsion flag	to r, the	e quote		
		will b	e conve	erted	to an	order.				
Search	Quote Mnt	Convert	Urde			w Quote	Duplicate			
HELP	OK/END	INSERT	LDEL	.ETE	PF	REV PG	NEXT PG	INQU	IRY	C

$\frown$	Memo	rized Orders								
Facility			То							
Facility Name		То	and the second s							
Customer#	То									
Customer Name										
Next Order Dt	05/27/12 To 06/	28/12								
Order Date	То							# In List		
Frequency	Operator							5		
Ln# Facility	Quote Customer Number	Customer Name	Amount Fg	Order Dt	Next Dt	Contact	Phone#	Conv Conv Ord		
1.	01100302 MERCYIC	MERCY HOSPITAL	63.30 M	-	and the second	And the rest of the	- Horiton	H		
2.	01100301 MARCOW	MICHAEL MARCOW	42.48 M	05/27/12	- Contraction of the second			N		
3.	01100298 SCOTTG	SCOTT G HEDICAL	142.50 M	05/27/12				N		
4.	01100295 UMC	UNIVERSITY MEDIC	4732.00	04/24/12	and the second s	JULIANNE RAUCO	212-555-1213	H		
5.	01100300 UMC	UNIVERSITY MEDIC	2.09 M	05/27/12	06/27/12	JULIANNE RAUCO	212-555-1213	N		
6.										
7.	l l									
8.						1	-14			
9.		By ut	ilizing ti	he fiel	lds at	pove, you	can eas	sily		
10.		ident	ifv the c	orders	vou	are lookin	ha for by			
11.							.g,			
		Папо	wing yo	Jui se						
Enter Line# to Ch	ange Next Order Date, or S to C	Change Se								
		By cr	nanging	the c	onve	rsion flag	to Y, the	e quote		
		wiii b	e conve	erted t	o an	order.				
Search	Quote Mnt	Convert	Urde			w Quote	Duplicate			
HELP	OK/END	INSERT	LDEL	.ETE	Pf	REV PG	NEXT PG	INQU	IRY	CA



#### **Standing Orders With Pending Dates**

PAGE:

1

DATE: 05/2	7/12	STANDING	ORDERS WITH ONE	OR NO RELEASE DATE LEFT	
COMPANY 01	TSH Medical	Company			
STANDING ORDER#	ENTERED DATE	REMAIN REL DATE	CUSTOMER NUMBER	CUSTOMER NAME	
01100294	04/23/12	04/23/12	UMC	UNIVERSITY MEDICAL CENTER	
01100295	04/24/12	04/24/12	UMC	UNIVERSITY MEDICAL CENTER	
01100298	05/27/12	05/28/12	SCOTTG	SCOTT G MEDICAL	
01100300	05/27/12	05/28/12	UMC	UNIVERSITY MEDICAL CENTER	
01100301	05/27/12	05/28/12	MARCOW	MICHAEL MARCOWITZ MD	
01100302	05/27/12	05/28/12	MERCYIC	MERCY HOSPITAL	



# Setting up Shipping and Invoicing options

- Ship CompleteInvoice Complete
- Monthly Billing

#### Setting Up Ship Complete

A 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	r	ye	Company	01	Sell Whse	001	Ship Whse	001
Order# 14	11806 Date	05/27/	12 TSH Medica	l Company	NEW YORK, N	(	NEW YORK, NY	
Bill			1	Ship-To				
Customer	SCOTTG			1.				
SCOTT G MEDICA			Country 000	SCOTT G			Country	000
123 MAIN STREE	Т		U.S.A.	123 MAIN	STREET		U.S.A.	_
-1								
DALLAS		ТХ	07013	DALLAS		TX	07013	
Cust Class	01 HOSP	1. 1		Salesman	004 INH	OUSE SALES		1
2.Req Dt	05/2	28/12 Futu	e N Bikt N	13.Cons/R	ent N	Return Dat	te	
3.As of Dt				14.Inv Cor	np N	-		1
4.Terms	01	NET 30		5,Ship C	omp N			
5.Source	01	CUSTOME	R PHONE IN	🤹 Inc	juiry List	or other Designation		
6.Cust PO#	0099			Settings <u>H</u> elp	East of the state	_		
7.Direct	Ve	endor		ACCEPTABLE VA	LVES :			
8.Spec Ins					evinenceso ar.			
9.Caller	\$0	(a		Y				
0.Ship Via	01	UPS		B				-
11.Cash	N			A				_
2.M/Bill	N							

# **Utilizing Ship Complete**

Order Entry He	eader		Company	y 01		Sell Whse	001	Ship W	/hse	001
rder#	141806 Date	05/27/12	TSH Med	lical Comp	any	NEW YORK	, NY	NEW Y	ORK, NY	
Bill					Ship-To					
Customer	SCOTTG			1	1.					
SCOTT G ME	EDICAL		Country 0	00	SCOTT G M	MEDICAL		C	ountry	000
123 MAIN ST	REET	1	U.S.A.		123 MAIN S	STREET		U	.s.a.	
		<u></u>			20.00000000000		Provide Land			
DALLAS		x	07013		DALLAS		TX		7013	
Cust Class	01 HOSPE	TALS			Salesman	004	INHOUSE SAL	ES		
	11		-	-			#		-	
.Req Dt	05/2	8/12 Future	N Bikt	N	13.Cons Re		N Return D	ate		
.As of Dt					4.Inv Com	1240	N			
.Terms		NET 30			15.Ship Co	mp	Y			
Source	01	CUSTOMER P	HONE IN		16.Cancel	Dt				
.Cust P0#	0099				17.Ord Hold	d	N Reason		- 2-2-	
.Direct	Ver	ndor			18.LIC#		N			
Spec Ins					19.Dea#			E	хр	
.Caller	SO	(			20.Route					
).Ship Via	01	UPS			21.Dly Stop					
1.Cash	N				22.Frt Class	5	XXX 🛬			
2.M/Bill	N						*			
MDS INQ	AR INQ CUSTOME	And the second s		ORD/HOLD			CUSTNOTE	ORDNOTE		
HELP	OK/END INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			

# **Utilizing Ship Complete**

HELP

OK/END

INSERT

LDELETE

PREV PG

NEXT PG

INQUIRY

CANCEL

Of

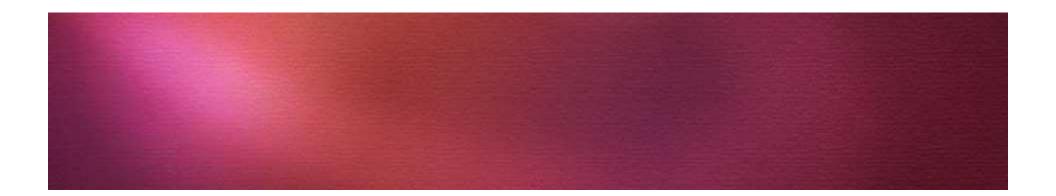
Order Entry He	ader				Company	01		Sell Whs	e O	01	Ship Whse	001
Order#	141806	Date	05/27	/12	TSH Medi	cal Comp	any	NEW YOF	RK, NY		NEW YORK, NY	
Bill							Ship-To					
Customer	SC	OTTG				14	1.					
SCOTT G ME	DICAL			Countr	y 000	0	SCOTT GI	MEDICAL			Country	000
123 MAIN ST	REET			U.S.A.			123 MAIN 9	STREET			U.S.A.	
					26							
DALLAS			TX	07013	3		DALLAS		TX		07013	-
Cust Class	0	1 HOSI	PITALS				Salesman	004	INHOUSE	SALES		()
						_			444			
2.Req Dt		05	/28/12 Fut	ire <mark>N</mark>	Blkt	N	13.Cons/Re	ent	N Retu	n Date		
3.As of Dt							14.Inv Con	1p	N			
4.Terms		01	NET 30				5.Ship Co	mp	Y			
5.Source		01	CUSTOM	ER PHONE	IN		16.Cancel	Ut				
6.Cust PO#		0099					17.Ord Hol	d	N Reas	on		
7.Direct		V	endor				18.LIC#		N			
8.Spec Ins							19.Dea#				Exp	
9.Caller		\$0					20.Route			312		
10.Ship Via		04	UDC				24 DL Cr.					
11.Cash	Onc	ce shi	o comple	ete is s	selecte	d, M[	DS will i	not	XXX	2		
12.M/Bill		-	order to						10			
						пень		50				
	are	availa	able to s	nip.								
MDS INQ	AR INQ	CUSTO	WER SALES N	IGT C	RM OF	RD/HOLD	0	1	CUSTNO	TE OR	DNOTE	



DATE 02:37:15pm 27 May 2012 SHIP COMPLETE SHIPMENTS NOT BILLED REGISTER PAGE 1

ORDER	A.CUST.NO	CUST.NAME	ORD DATE	TOT.AMT
01141806	SCOTTG	SCOTT G MEDICAL	05/27/12	575.28
***				575.28

1 records listed.



#### **Invoice Complete feature**

- Scott G Medical does not want multiple invoices on his orders.
- By Selecting the Invoice complete option, Scott G Medical will only get one invoice per order.
- MDS offers reporting tools so you can keep track of orders that have shipped, but have not yet been billed.

#### Invoice Complete

🐐 🕫 Edit Settings Reset Cools GUI Standard Functions Special Functions Help

)rder Entry Heade )rder# 1	41822 Date	06/04/	1000	mpany H Modical	01	Sell Whse NEW YORK, NY	001	Ship Whse NEW YORK, NY	001
Bill	41022 Date	06/04/	12 15	H Medical	and the second se		N	NEW TORK, NT	
Customer	SCOTTG				Ship-To 1.				
SCOTT G MEDIC		-	Country	000	2 BELL	G MEDICAL		Country	000
123 MAIN STREE			U.S.A.	000		N STREET		U.S.A.	000
125 MAIN STREE			0.5.A.	-	125 MAI	I SIKEEI		0.5.A.	
					-			P	
DALLAS		ГХ	07013		DALLAS		TX	07013	
Cust Class	01 HOSP		01015		Salesma		OUSE SALE		-
cust cities	or most	THE S			Juiconn		OUDE DALL		
2.Req Dt	06/0	04/12 Futu	e N E	Bikt N	13.Cons	Rent	Return Da	te	
3.As of Dt					14.Inv C		rician Du		
1.Terms	01	NET 30			15 Shin				
5.Source	01		R PHONE IN		5	Inquiry List			X
S.Cust PO#	44499				Settings	heip			
7.Direct	A CONCEPTION	ndor			ACCEPT	ABLE VALUES :			
3.Spec Ins					Y				
).Caller	\$0				N				15
0.Ship Via	01	UPS		-					
1.Cash	N								
2.M/Bill	Ŷ								
	10 mm 10								
					ot p				
MDSINQ ARI	NQ CUSTOM	ER SALES M	GT CRM	ORD/H	OLD				

- 6 ×

#### Invoice Complete

🐐 🕫 Edit Settings Reset Cools GUI Standard Functions Special Functions Help

Order Entry Heade	and the second se		-	npany	01	Sell Whse	001	Ship Whse	001
	41822 Date	06/04/12	2 TSł	l Medical	Company	NEW YORK, I	IY.	NEW YORK, NY	
Bill			-		Ship-T	0			
Customer	SCOTTG		1	1000	1.			Country	
SCOTT G MEDICAL			Country	000		T G MEDICAL			000
123 MAIN STREET			U.S.A.		123 M	123 MAIN STREET			
DALLAS			07042		DALL	10	TV	07642	
DALLAS TX C Cust Class 01 HOSPITALS			07013		DALL/ Sales		TX HOUSE SALE	07013	
cust class	of nospin	ALS			Sales	nan 004 IN	NUUSE SALL	3	
2 Deg Dt	06/04/	/12 Future	N B	lkt N	14.50	ns/Rent	N Return Da	ata	_
2.Req Dt 3.As of Dt	00/04/	Future	D N	IKI N		Comp		ate	
4.Terms	01 N	NET 30			141	n Comp	N		
5.Source	01 CUSTOMER PHONE IN					Inquiry Lat			
6.Cust PO#	44499				Settings	Settings Heip			
7.Direct	Vendor				ACCEI	ACCEPTABLE VALUES :			
8.Spec Ins	v cin		1						
9.Caller	\$0				Y N				
10.Ship Via	1977	UPS		-	III III				
11.Cash	N					This option (	can be	set in	
CARACTER PROPERTY.	Ÿ					he custome			
12.M/Bill	No. of the second se								
12.M/Bill						selected on	an indiv	/idual	
12.M/Bill									
12.M/Bill						order.			
12.M/Bill MDS INQ AR	ING CUSTOMER	R   SALES MGT	CRN	ORDA		order.			

- 6 ×

### Monthly Billing

- MDS offers your customers the option of getting all their invoices at the end of the period.
- The invoices can be printed with an end of period consolidated statement.
- Invoices are created during the period, but the printing is suppressed. At month end the statement prints with all invoices behind it.

## Setting up Monthly Billing

🐐 🔂 Edt Settings Reset Tools GLI Standard Functions Special Functions Help

Customer Master Customer#	SCOTTG	60.ALC Priority	Internal #	100639		
42.Dea#	500110	61.Freight Class		<u> </u>		
43.Dea Exp Date		62.Charge Freight	Ŷ			
44.Drug Type	1.	63.Frt Surcharge %		00		
thorng type	2.	64.Frt Surcharge \$		0.00		
45.License Name		65.Surcharge Basis	h <mark>at</mark>			
46.License #	-	66.Frt Min Dol		0.00		
47.Lic Exp Date		67.EDI Cust#				
46.Med Data Sh		68.Recv 850.EDI	N			
49.Monthly Bill	Y	69. Send 855 EDI	N			
50.Serv Co#	01	70.Send 856 EDI	N			
51 Serv Whse	001	71.Send 810 EDI	×			
52.GLN Number		72.Cust.P0 #				
53.Admin Fee %	0.00	73.Cust PO Mask				
54.Label Fee	0.00	74.Cust P0 Match				
55.Facility	1	75.Wild Card				
56.Department		76.DUNS Number				
57.Pick Priority		77.Dunning Flag	N	1		
58.Allocate By		78.Ship Complete				
59.GP0						
					PAGE 2 OF 7	
			IOTES			Userfile
HELP OK/EN	D INSERT LDELETE		QUIRY CANCEL	Off		Popup

- 3 ×

### Monthly Billing Info at Order Entry

💃 🗐 Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Order Entry H				Compa	1000 C		Sell Whse	001	Ship Wh		001
Order#	141307	Date	05/29/12	TSH M	edical Comp	any	NEW YORK,	NY	NEW Y0	RK, NY	
Bill						Ship-To					
Customer	SCO	ΠG				1. 0	00001				
SCOTT G MI	DICAL			Country	000	Dr. Dr. Micha	nel Scott		Co	untry	000
123 MAIN ST	REET			U.S.A.		145 Main Str	eet		U.9	S.A.	
DALLAS		Т	X	07013		Scranton		PA	257	61	
Cust Class	01	HOSPI	TALS			Salesman	004 II	NHOUSE SAL	ES		
2.Req Dt		05/2	9/12 Future	N Blkt	N	13.Cons/Ren	t	Return D	ate		
3.As of Dt											
4.Terms		01	NET 30			Monthl	y Billin	ig Info	ormation		
5.Source		01	CUSTOMER	PHONE IN							
6.Cust PO#		9988				1.Dept#	XXXXXXX	XXXXXXXXXXX	XXXXXXXX		
7.Direct		Vei	ndor			2.Req#					
B.Spec Ins											
9.Caller		so									
0.Ship Via		01	UPS								
1.Cash		N Y									
2.M/Bill		Ŷ									
					-						
	3							Î			
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG		CANCEL	Off			

- 8 ×

### Monthly Billing Info at Order Entry

💃 🗐 Edit Settings Reset Tools GUI Standard Functions Special Functions Help

Order#       141307       Date       0529/12       TSH Medical Company       NEW YORK, NY       NEW YORK, NY         Bill       Ship.To       1.       000001         SCOTT G MEDICAL       Country       000       Dr. Dr. Michael Scott       Country       000         123 MAIN STREET       U.S.A.       145 Main Street       U.S.A.       145 Main Street       U.S.A.         DALLAS       TX       07013       Scanton       PA       25761         Cust Class       01       HOSPITALS       Salesman       004       INHOUSE SALES         2.Req Dt       05/29/12       Future       N       Bilk       N       13.ConsRent       Return Date         5.Source       01       NET 30       N       Nonthly       Billing       Information         5.Source       01       CUSTOMER PHONE IN       Coust Op/9       9988       Nonthly       NOOXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Order Entry	Header			Comp	any 01		Sell Whse	001	Ship Wh	se	001
Customer       SCOTTG       1.00001         SCOTT G MEDICAL       Country       000         123 MAIN STREET       U.S.A.         DALLAS       TX       07013         Cust Class       01       HOSPITALS         Scource       01       NET 30         Scource       01       USTOMER PHONE IN         6.Cust PO#       9988         9.Caller       SO         9.Caller       SO         11.Cash       N         12.M/Bill       Y         Monthly billing allows the entry of a Department and/or Requisition number. This can be used to generate custom reports.	Terre Parents - an owner		Date	05/29/12	and the second se	11000	any	NEW YORK	NY	and the second second second	35611	CONTRACT OF CONTRACT
SCOTT G MEDICAL       Country       000       Dr. Dr. Michael Scott       Country       001         123 MAIN STREET       U.S.A.       145 Main Street       U.S.A.       145 Main Street       U.S.A.         DALLAS       TX       07013       Scianton       PA       25761         Cust Class       01       HOSPITALS       Salesman       004       INHOUSE SALES         2.Req Dt       05/29/12       Future       N       13.ConsRent       Return Date         3.As of Dt       4.Terms       01       NET 30       Monthly       Billing       Information         5.Source       01       CUSTOMER PHONE IN       Monthly       Billing       Information         6.Cust PO#       9988       7.Direct       So       Source       01       UPS         10.Ship Via       01       UPS       Monthly billing allows the entry of a Department and/or Requisition number. This can be used to generate custom reports.	Bill						Ship-To					
123 MAIN STREET       U.S.A.         DALLAS       TX         OTOTI3       Scranton         Cust Class       01         01       HOSPITALS         Salesman       004         Iterms       01         01       NET 30         Scource       01         Cust Class       01         Nerrows       01         Otscource       01         Cust Conscience       01         Cust Conscience       01         Cust Conscience       01         Outscource       01         Otscource       01         Cust Conscience       01         Cust PO#       9988         7.Direct       Vendor         8.Spec Ins       9.Caller         SO       0.0         10.Ship Via       01         UPS       Monthly billing allows the entry of a Department and/or Requisition number. This can be used to generate custom reports.	Customer	SCO	DITG				1.	000001				
DALLAS       TX       07013       Scranton       PA       25761         Cust Class       01       HOSPITALS       Salesman       004       NHOUSE SALES         2.Req Dt       05/29/12       Future       N       Blkt       N       13.Cons:Rent       Return Date         3.As of Dt       01       NET 30       Monthly       Billing       Information         5.Source       01       CUSTOMER PHONE IN       Monthly       Billing       Information         6.Cust PO#       9988	SCOTT G	MEDICAL		(	Country	000	Dr. Dr. Mic	hael Scott		Co	untry	000
Cust Class       01       HOSPITALS       Salesman       004       INHOUSE SALES         2.Req Dt       05/29/12       Future       N       Bilkt       N       13.Cons®rent       Return Date         3.As of Dt       01       NET 30       Monthly       Billing       Information         5.Source       01       CUSTOMER PHONE IN       Monthly       Billing       Information         6.Cust PO#       9988       9988       1.Dept#       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	123 MAIN	STREET			J.S.A.		145 Main S	treet		0.9	S.A.	
Cust Class       01       HOSPITALS       Salesman       004       INHOUSE SALES         2.Req Dt       05/29/12       Future       N       Bikt       N       13.Cons®ent       Return Date         3.As of Dt       01       NET 30       Monthly       Billing       Information         5.Source       01       CUSTOMER PHONE IN       Monthly       Billing       Information         6.Cust PO#       9988       9988       Req#       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX												
Cust Class       01       HOSPITALS       Salesman       004       INHOUSE SALES         2.Req Dt       05/29/12       Future       N       Bilkt       N       13.Cons®rent       Return Date         3.As of Dt       01       NET 30       Monthly       Billing       Information         5.Source       01       CUSTOMER PHONE IN       Monthly       Billing       Information         6.Cust PO#       9988       9988       1.Dept#       XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX												
2.Req Dt       05/29/12       Future       N       13.Cons/Rent       Return Date         3.As of Dt       1       Image: Solution of the solution of	CONTRACTOR NO.		Contain Constain		07013		a second a second as		and the second se		61	
3.As of Dt 4.Terms 01 NET 30 5.Source 01 CUSTOMER PHONE IN 6.Cust PO# 9988 7.Direct Vendor 8.Spec Ins 9.Caller SO 10.Ship Via 01 UPS 11.Cash N 12.M/Bill Y 12.M/Bill Y	Cust Class	01	HOSPIT	ALS			Salesman	004	INHOUSE SAL	ES		
3.As of Dt 4.Terms 01 NET 30 5.Source 01 CUSTOMER PHONE IN 6.Cust PO# 9988 7.Direct Vendor 8.Spec Ins 9.Caller SO 10.Ship Via 01 UPS 11.Cash N 12.M/Bill Y 12.M/Bill Y									1 <b>-</b> 108 - 4		T	
4.Terms 01 NET 30 5.Source 01 CUSTOMER PHONE IN 6.Cust PO# 9988 7.Direct Vendor 9.Caller SO 10.Ship Via 01 UPS 11.Cash N 12.M/Bill Y			05/29/	12 Future	N Blkt	N	13.Cons/Re	nt	Return D	ate		
5.Source 01 CUSTOMER PHONE IN 6.Cust PO# 9988 7.Direct Vendor 8.Spec Ins 9.Caller SO 10.Ship Via 01 UPS 11.Cash N 12.M/Bill Y											_	
6.Cust PO# 9988 7.Direct Vendor 8.Spec Ins 9.Caller SO 11.Cash N 12.M/Bill Y	A State of the second		and the second se				Mont	hly Billi	ng Inf	ormation		
7.Direct       Vendor       2.Req#         8.Spec Ins       9.Caller       50         9.Caller       01       UPS         10.Ship Via       01       UPS         11.Cash       N       Y         12.M/Bill       Y       Vendor         2.Req#       Monthly billing allows the entry of a Department and/or Requisition number. This can be used to generate custom reports.				CUSTOMER P	HONEIN			tanana				
8.Spec Ins 9.Caller SO 10.Ship Via 01 UPS 11.Cash N 12.M/Bill Y Market Harmonic Andrew Streen Solution Streen Solution Streen Solution Streen Solution Solution Solution Streen Solution Sol	NAME OF A DESCRIPTION OF A		100000					RXXXXX	XXXXXXXXXXXX	XXXXXXXX		_
9.Caller 10.Ship Via 11.Cash 12.M/Bill V V V V V V V V V V V V V	H BROADS		Vend	lor			2.Req#					
10.Ship Via       01       UPS         11.Cash       N       Y         12.M/Bill       Y       Via         Monthly billing allows the entry of a Department and/or Requisition number. This can be used to generate custom reports.			La carc									
11. Cash       N         12.M/Bill       V         Monthly billing allows the entry of a Department and/or Requisition number. This can be used to generate custom reports.			سر. مستعد									
and/or Requisition number. This can be used to generate custom reports.	CONTRACTOR AND			JPS								
and/or Requisition number. This can be used to generate custom reports.			N			Month	ly billing	g allows	the enti	ry of a L	Departi	ment
generate custom reports.	12.M/Bill		Ĩ			and/or	Requis	sition nu	mber. 1	his can	be us	ed to
							-					
						genera		omrepo	лts			
			1	1								
HELP   OK/END   INSERT   LDELETE   PREVPG   MEATPO   INQUINT   CANCEL   OT   I   PO	HELP	OK/END	INSERT	LDELETE	PREV PG							ј Рор

- 8 ×

# Monthly Billing Invoice

Monthly Billing Invoice Print       Capture:On         1. Fiscal Period	👫 Eile Edit Settings Reset	Tools GUI Standard Functions S	Special Functions Help		-
2. Customer#		м	onthly Billing Invoice Print	Capture:On	
Inquiry List   Settings   Fiscal Period   Options     All Fiscal Periods   Fiscal Period   Specific Fiscal Period   END     Add     OK	1. Fiscal Period				
Settings Help         Fiscal Period Options         All Fiscal Periods         Fiscal Period Range         Specific Fiscal Period         END         Add	2. Customer#				
Fiscal Period Options     All Fiscal Periods   Fiscal Period Range   Specific Fiscal Period   END     END     Add     OK     Cancel					
All Fiscal Periods         Fiscal Period Range         Specific Fiscal Period         END         Add         OK			A Marco and A M		
Fiscal Period Range Specific Fiscal Period END Add OK Cancel			Fiscal Period Options		
Fiscal Period Range Specific Fiscal Period END Add OK Cancel			All Fiscal Periods		
Add OK Cancel					
Add OK Cancel			Specific Fiscal Period		
			END		
			Add	OK Cancel	
	HELP OK/END	INSERT LDELETE I			Рорь

### **Selecting Customers to Print Invoices**

		Monthly Billing I	Invoice Print	Capture:On
1. Fiscal Period	1205		1205	
2. Customer#	[ Province 1	Inquiry Lis ettings Help customer Options All Customers Customer Range Specific Customer END		
	l l	Add	ОК	Cancel

## Prints Statement Plus All Invoices for the Period Selected

### Statement



TSH Import Company 1033 ROUTE 46 CLIFTON, NJ 07013

Tel: 973-777-8050

SCOTT G MEDICAL 123 MAIN STREET DALLAS TX 07013 Please Remit To: TSH Import Company 1033 ROUTE 46 CLIFTON, NJ 07013

Tel: 973-777-8050

SCOTTG	
INHOUSE SALE	S
05/30/12	
03/15/71	\$0.00
01 NET 30	
	INHOUSE SALE 05/30/12 03/15/71

Tnx	Date	Transaction	Reference	Original Amount	Payment/Credits	x	Balance
INV INV		01519285 01519286	9990 1111	135.50 10,506.00	0.00 0.00		135.50 10,506.00
	Total			10641.50	0.00		10,641.50
INV	05/18/12	01519284	1245	118.00	0.00		118.00
	Total 145 Main	000001 Street	PA 25761	118.00	0.00		118.00

## Prints Statement Plus All Invoices for the Period Selected

### Statement



TSH Import Company 1033 ROUTE 46 CLIFTON, NJ 07013

Tel: 973-777-8050

SCOTT G MEDICAL 123 MAIN STREET DALLAS TX 07013 Please Remit To: TSH Import Company 1033 ROUTE 46 CLIFTON, NJ 07013

Tel: 973-777-8050

SCOTTG	
INHOUSE SALE	S
05/30/12	
03/15/71	\$0.00
01 NET 30	
	INHOUSE SALE 05/30/12 03/15/71

Tnx	Date	Transaction	Reference	Original Amount	Payment/Credits	x	Balance
INV INV		01519285 01519286	9990 1111	135.50 10,506.00	0.00 0.00		135.50 10,506.00
	Total			10641.50	0.00		10,641.50
INV	05/18/12	01519284	1245	118.00	0.00		118.00
	Total 145 Main	000001 Street	PA 25761	118.00	0.00		118.00

# Prints Statement Plus All Invoices for the Period Selected

### Statement



TSH Import Company 1033 ROUTE 46 CLIFTON, NJ 07013 Please Remit To: TSH Import Company 1033 ROUTE 46 CLIFTON, NJ 07013



### Invoice

Inv Number 01519286 Page: 1

TSH Import Company 1033 ROUTE 46 CLIFTON, NJ 07013

Tel: 973-777-8050

Bill-to: SCOTTG

SCOTT G MEDICAL 123 MAIN STREET DALLAS TX 07013 Please Remit To: TSH Import Company 1033 ROUTE 46 CLIFTON, NJ 07013

Tel: 973-777-8050

Ship-to:	001	SY
SCOTT G MEDICAL 123 MAIN STREET DALLAS TX 0701		

Invoice Date:	05/29/12	Salesman:	INHOUSE SALES
Ship Date:	05/29/12	Ship Via:	UPS
Our Order No:	01141808001	Customer Order #:	1111

### **Targeting Potential Sales**

- Missing Sales
- Inactive Customers
- Similar Customers and what they have purchased

### **Missing Sales Report selection**

\\192.168.253.135\demo.archive\CAPTU	RE			
Preview Design	Open Report	Save Report		
Enter Values				x
nter Fiscal Period (YYMM)			Fiscal Period	^
1205				
nter The Number of Periods To Have "0" Sale	<b>2</b> \$		Periods To Have "0" Sales	
6				
nter Number of Previous Periods To Include	ļ		Previous Periods To Include	
6				
nter Minimum Units To Print			Minimum Units To Print	
1				
nter Company # or 'A' For All			Company #	
A				
nter Customer # or 'A' For All			Customer #	

## **Missing Sales Report**



### FROM FISCAL PERIOD 1205 FOR 6 PERIODS OF SERO SALES AND TOTAL SALES OF 12 PERIODS 05/27/12 15:19:50

MISSING SALES REPORT

Fage 1 of 1

11		0% U/M VENDO			PREVIOUS 1111 T	100 00 00 00 00 00 00 00 00 00 00 00 00	LAST 6 PERIODS 1205 TO 1112		
FRODUCT CODE	DESCRIPTION	U/M	VENDOR	P/C	UNITS	SALES	UNITS	SALESS	
580320	GOWN EXAM 30X42 DSP 50/CS	CS	ABCO	058	2	39	0	0	
82003	SCOTCHCAST 3" WHITE 10/BX	BX	MMM	038	2	179	0	0	
82005	SCOTCHCAST 5" WHITE 10/BX	BX	NOM	038	2	289	٥	٥	
NIPFT102	GLOVES NITRILE P-F SMALL	BX	ABCO	006	2	23	a	٥	
NIPFT103	GLOVES NITRILE P-F MEDIUM	BX	ABCO	006	2	23	σ	٥	
NIPFT104	GLOVES NITRILE P-F LARGE	BX	ABCO	006	2	23	0	0	
NIPFT105	GLOVES NITRILE P-F X LGE	BX	ABCO	006	2	23	0	00	
NS11200-1	STEP STOOL	EA	BREWER	048	5	200	0	0	
NS5-568	CAST SHEARS 8" ESMASRCH	EA	MILTEX	047	4	32.4	٥	0	
NS7324	ORTHOFLEX 4" J&J	BX	SENECA	028	в	643	σ	٥	
NS7374-1	PLASTER BDGE 4"	BX	SENECA.	038	4	166	a	٥	
N37376	PLASTE BDGE 6"	BX	SENECA	035	4	230	0	008	
NS81120	STOCKINETTE 12"N/S 2RL/CS	CS	ABCO	038	2	164	0	0	
NSN0781220	STOCKINETTE 2" N/3	EA	ABCO	038	4	26	٥	0	
NSN0761320	STOCKINETTE 3" N/S	EA	ABCO	038	4	41	a	0	
NSN0781620	STOCKINETTE 5" N/S	EA	ABCO	038	4	80	a	0	
NSV927-3100	CAST BREAKER	EA	MILTEX	047	4	461	0	0	
NSV95-50455	SCISSORS BANDAGE 5 1/2	EA	MILTEX	047	9	73	0	0	
STANFORD	STANFORD UNIVERSITY				66	3003	0	0	
01	TSH Medical Company				66	3003	0	0	
FINAL RESULT					66	3003	0	0	

### **Missing Sales Report**

2 L

STANFORD

FINAL RESULT

STANFORD UNIVERSIT

TSH Medical Company

		1 million (1997)				
5	FROM FISCAL PERIOD 1205	FOR 6 PERIODS	OF SERO SALES AND TOTAL SAL	ES OF 12 PERIO	OS 05/27/12 15:19:50	0
TT FRODUCT CODE	DESCRIPTION	U/M	VENDOR	P/C	PREVIOUS 6 1111 TO 0 UNITS	PER 16.
580320	GOWN EXAM 30X42 D3P 50/CS	CS	ABCO	058	2	
82003	SCOTCHCAST 3" WHITE 10/BX	BX	MMM	038	2	
82005	SCOTCHCAST 5" WHITE 10/BX	BX	NMM	035	2	
NIPFT102	GLOVES NITRILE P-F SMALL	BX	ABCO	006	2	
NIPFT103	GLOVES NITRILE P-F MEDIUM	BX	ABCO	006	2	
NIPFT104	GLOVES NITRILE P-F LARGE	BX	ABCO	006	2	
NIPFT105	GLOVES NITRILE P-F X LGE	BX	ABCO	006	2	
NS11200-1	STEP STOOL	EA	BREWER	048	5	
135-568	CAST SHEARS 8" ESMASRCH	EA	MILTEX	047	4	
NS7324	ORTHOFLEX 4" J&J	BX	SENECA	028	а	
NS7374-1	PLASTER EDGE 4"	BX	SENECA.	038	4	
NS7376	PLASTE BDGE 6"	BX	SENECA	035	4	
NS81120	STOCKINETTE 12"N/S 2RL/CS	CS	ABCO	038	2	
NSN0781220	STOCKINETTE 2" N/S	EA	ABCO	035	4	
NSN0761320	STOCKINETTE 3" N/S	EA	ABCO	038	4	
NSN0781620	STOCKINETTE 5" N/S		du ata thataw		maka hay	
NSV927+3100	CAST BREAKER VVE CAN	see pro	ducts that ou	CUSIO	mers nav	e
NSV95-50435	SCISSORS BANDAGE 5 DROVIOUS	ly and h	have not done	s en in	the nact (	R r

MISSING SALES REPORT

We can see products that our customers have bought from us previously and have not done so in the past 6 months. Do you want to know why?

Fage 1 of 1

SALESS

Û.

ō.

ò

LAST 6 PERIODS

1205 TO 1112

UNITS

ġ.

Ó.

ũ

ġ.

ũ

ġ.

PERIODS

SALESS

## **Inactive Customers by Sales Rep**

14.		INACTIVE CUST	MER REPORT AS	OF 04/30/12	09:34:24				Page 1 of	ť 1.					
5				FOR FISCAL PE	RIOD 04		1								
П				ſ	MONTH SA	LES PCT		YTD SALA	S PCT			IROSS FROF	IT PCT		_
CUSTOMER	# 4 NAME	LAST ORD DATE	ON MTD	ORDERS YTD	THIS YR	LAST YR	OGE	THIS YR.	LAST YR	COE	THIS YR	LAST YR	PCT COE	PCT GP	
WTHE	GUTTENBURG MON BOSPITAL	7/4/2011	1	2	0	0	0	44	0	0	17		0	0	-1
ERCYCB	MERCY CARE BLAIRSFERRY	8/17/2011	18	163	5422	٥	٥	12699	0	0	2970		0	0	1000
ERCYCCP	MERCY CARE CENTER POINT	6/14/2011	G	3	68	٥	٥	68	0	0	16		0	0	100
ERCYCCR	MERCY CARE CEDAR RAPIDS	4/25/2012	9	31	0	0	0	0	0	0	0		0	0	
ERCYCIND	MEDICAL ASSOCIATES OF	B/11/2011	6	80	3544	0	0	20422	0	0	4549		0	0	100
ERCYCJA	MERCY CARE JOHNSON AVENU	B/11/2011	34	251	2591	0	0	11236	0	0	2957		0	0	100
ERCYOMAR	MERCY CARE MARION	7/12/2011	35	264	2045	0	0	11981	0	0	3270		0	0	1
ERCYCSA	MERCY CARE 2ND AVENUE	7/12/2011	10	77	532	0	0	2266	0	0	655		0	0	(07)
ERCYCVV	MERCY CARE VERNON VILLAG	7/10/2011	6	54	1364	٥	٥	8494	0	0	1962		0	0	
ERCYFC	MERCY FITNESS CENTER	7/6/2011	3	15	108	٥	٥	746	0	0	173		0	0	100
mercy	MT MERCY COLLEGE	11/30/2010	6	1	0	0	0	195	0	0	65		0	0	
003	LISA FERTIG		122	941	15675	0	0	68152	0	0	16633		0	c	1
1	TSB Medical Company		167	1338	40693	0	0	160356	0	0	46535		0	0	3
THAL TOTAL	L		167	1338	40693	0	0	160356	0	0	46535		0	0	

# How can I find out what my customers want?

- MDS can group like customers together.
- If we know what similar customers are buying, this customer should also be buying.
- Direct your sales efforts by using this information .







### Associating Customers with a Class

- 8 ×

🙀 Eie Edt Settings Reset Tools GUI Standard Functions Special Functions Help

Customer Master M	aintenance		Internal #	100639	Created	08/07/08
Customer#	SCOTTG		21.Special Pricing			
1.Name	SCOTT G MEDICAL		22.Spec Prc Cont#			
2.Address 1	123 MAIN STREET	£	23.Spec Prc Alert			
3.Address 2			24.Shipto Code	R		
4.Address 3			25.Ship Method	0	I UPS	
5.City	DALLAS	2	26.Ship Zone			
6.State	TX Country	000 U.S.A.	27.Terms Code		01 NET 30	
7.Zip Code	07013	8.Res/Comm	C 28.Taxable	N		
9.DEA Code			29.Tax Juris		00S OUT	OF STATE
10.A/R Contact			30.Tax Exempt#			
11.Telephone			31.Exempt Exp Dt			
12.Fax Number			32.Service Chg	N	# Days	0
Email			33.Credit Method		5	
13.Master A/R			34.Credit Limit		40000	
14.Cust Class	01 HOSPITALS		35.Credit Days	9	)	
15.Cust Type	02 DOCTORS,CI	LINICS	36.Credit Hold	N		
16.cust Group			37.Accept B/O	Y		
17.Abc Co Territory			38.Accept Partial	Y		
18.Spec Inst			39.Accept Subs	Y		
19.Purch Cont			40.Prc HId Exempt	N		
20.Purch Phone			41.Inactive Flag			
ENTER LINE # TO CH	ANGE, DELETE TO DELE	TE,0 TO ACCEPT	XX	XXXX	PAGE 1	0F 7

### **Similar Potential Sales**

 $F_{\rm r}$  Edit Settings Reset Tools GU: Standarc Functions Special Functions Hep

							-		
		Targeted P	otential Sales	\$			Capture:On		
1. Company Number	All								
2. Customer#	All			_					
3. Vendor#	All								
4 Devel Class	411								
4. Prod Class	All				-				
5. Fiscal Period					fin .	1111		-0	
6. Number of Months (01-36)						6			
er manne er mennare (er ev)									
7. Customer Type	Rai								
8. Salesman	TYPE I	DESC		to					
	01 02	HOSPITALS DOCTORS,CLI	INICS						
9. Product#	03 04 05	NURSING HOM PHARMACY							
	06 07	MISC, SCHOOL DENTISTS CHIROPRACTI							
	08	VETERINARY							
								í –	
HELP OK/END I	INSERT LDELE	TE PREV PG	NEXT PG	INQUIRY	CANCEL	Off		1	

- 6 ×

## Selecting a Specific Sales Rep

### $\frac{1}{4}$ Eile Edit Settings Reset Tools GUI Standard Functions Special Functions Help

	Targeted Potential Sales	Capture:On
1. Company Number	All	
2. Customer#	All	
3. Vendor#	All	
4. Prod Class	All	
5. Fiscal Period		1111
6. Number of Months (01-3	3)	6
7. Customer Type	Rai	
8. Salesman	01 to 01	
9. Product#	SLM NAME OO1 SY FERTIG OO2 DAVID FERTIG OO3 LISA FERTIG OO4 INHOUSE SALES OO5 KEVIN LYNCH OO6 RETAIL SALES OO7 GUS VELEZ	
HELP OK/END	INSERT LDELETE PREV PG NEXT PG INQUIRY C	ANCEL Off Pe

-

### **Selecting Specific Products**

🙀 📴 Edit Settings Reset Tools GUI Standard Functions Special Functions Help

	Targeted Potential Sales	Capture:On
1. Company Number	AII	
2. Customer#	All	
3. Vendor#	All	
4. Prod Class	All	
5. Fiscal Period		1111
6. Number of Months (01-36		6
7. Customer Type	Rai	
8. Salesman	Inquiry List	
9. Product#	Product Options All Products	
	Product Range	
	Specific Product END	
Help ok/end	INS	Off

-

# Products that similar Customers have purchased

12:09:56pm 30 May 2012	Targeted Potential Sales Report Page 1
CUSTOMER#: BNDA	BAHAMAS NATIONAL
Product#	Description1 Description2
001205	EKG ULTRASOUND GEL 8 02
001222	EKG ULTRASOUND GEL 5LTR
001290	STIRRUP MATES PAIRS
00185	SUCKERS SAFETY FOF 100/CT ASSORTED
002-0396-01	SPEEDCLEAN
00200	BULB HALOGEN 3.5V
002002	TOURNIQUET 1X18 250/BOX
00553	ACCUCHER STRIPS (1191857)
0074-4276-01	LIDOCAINE 1% PL 20ML 1152636
0074-4277-01	LIDOCAINE 2% PL
007868	EKG PAPER THERM 200SHT/PD
007981	EKG CHART PAPER E800
007984	EKG PAPER THERM 200SHT/PD 50 YEAR QUALITY ASSURANCE
007987	EKG PAPER 200/PAD
007989	EKG PAPER THERM 300SHT/PD 50 YEAR QUALITY ASSURANCE
01131	BACITRACIN OINT 102
01209	TRIPLE ANITHIOTIC OINTIGT 144/BX
012290	INST DETERGENT FWD 4LB/CT ALCONOX LIKE
01500	TOWEL, C-FOLD SURPASS
016659	BULB ONLY FOR SPHYG
01679-200	SURETEMP THERMOMETER
0178	FREG TEST CARDS Q.S. 30/K
0179	PREG TEST CARDS Q.S. 90/K
01804	TOWEL, MULTIFOLD SURPASS
02-5300	GLOVE NS ULTRACARE SM 100 POWDER FREE INNER SURFACE
02-AL	ANKLE STIRRUP AIRCAST LFT
02-AR	ANKLE STIRRUP AIRCAST RT
0205-36	LUBE JELLY SURGILUBE 402 12/BX
0230	BAND AID COVERLET 3/4"
0231	BAND AID COVERLET 1"
02500	BULB FOR HEADLIGHTS
0257	FREG TEST RAFIDVUE 25/KIT

### **Prospect/Customer Tracking**

Tracking Sales Efforts through Drill Down
 Assigning prospects and follow-up dates
 Tracking Sales efforts Executive inquiry

## **Prospect Selection**

辑 Eile Edit Settings Reset Tools GUI Standard Functions Special Functions Hep

ect	Name							
Ra	nge	To		Action	100		1	
ode		То		List :				
ie N	umber							
ow U	p Dt	То						
tus			Source					
siness			Notes					
							Follow Up	
Ln#	Prospect #	Name		City	St	Stat	Date	Time
1.	UMC	UNIVERSITY MEDICAL CEN	TER	NEW YORK CITY	NY	CUS	06/13/12	12:00
2.	TRINITY	TRINITY MEDICAL CENTER		STATEN ISLAND	NY	PR0	06/21/12	14:00
3.	ABCOFS	ABCO FINANCIAL SERVICE	S	HILTON HEAD	SC	PR0	07/12/12	13:00
4.								
5.					_			-
6.							-	
7.								
8.					_			
9.						1		
10.								-
1.					1.	2		17
inter L	ine# for Detail or S t	o Change Search Criteria		×	XXXXX			

- 8 ×

### **Prospect File Detail**

ales Mana	agement Call	Detail			SIs	sm 00	1 SY F	ERTIG				Tota	1		6
rospect#	TRINI	TY		TR	INITY ME	DICAL	CENTER					Curr	ent		4
itySt	STATEN IS	LAND	N	PR	OSPECT		Busines	s Type		01	HOSPITALS				
ontact	JOE BUS	Η		Sachta		0	Status C	ode		PRO	PROSPEC	Г			
ïtle					1		Follow	Jp Date			06/21/12	14:00	6	a	
hone	718-111-1	111	Ex	t			Next Ste	ep		F/U v	vith pricing				1
-Mail	ELAB@TI	RINITY.COM							1					0	
Veb Url									Courc	е	HIDA list			_	
Opera	ator	Date	8	Time	Note	s/Text						Note#	1	of	3
OSY		04	/26/12	15:19	Larry	y Will b	e taking	over for Jo	e over the	e nex	t 3				CC
ontact	Larry Hu	sh		6 Col 9 Col 6 Col	@ wee	eks. He	can be re	ached at J	oe conta	ct nui	nber.				ð Ø
Action		ID LETTER	05/0	5/12	Hev	would I	ike a call	next week	about ge	etting	a				Ø
			-				upplies.								8 8 8 8 8 8 8 8 8 8
							and the second second								100
ustomer S	Specific Area														æ
	Custom Field				-										œ
															6
vailable (	Custom Field														8
Wallable (					-										6
vailable (	Custom Field				in the										6
waname (	Sustom Field				110										
															6
Click on	a field to upd	ata ar OK/EN	ID to Acc	out					XXXXXX	111		PAGE 1	AE 2		
CIICK OIL &	a nera to upu	ate of OR/EN	ID TO ACC	ept								FAGE	OF 3		
Ord Entry	Prev Rec	Next Rec	Cred	App	Add Not	te I	Vids Inq	Cust Ord	Cust	Hist	Quote	Quote Inq	E	Mail	Contac
HELP	OK/END	INSERT	LDEL	ETE	PREV P	GIN	EXT PG	INQUIRY	CAN	CEL	Off	P			Popu

### **Prospect File Detail**

ales Mana	agement Call	Detail			SI	sm 00	1 SY F	ERTIG				Tota	1		6
rospect#	TRINI	TY		TR	INITY ME	DICAL	CENTER					Curr	ent		4
itySt	STATEN IS	LAND	N	Y PF	ROSPECT		Busines	s Type		01	HOSPITALS				
ontact	JOE BUS	Н		0000		0	Status (	ode		PRO	PROSPECT	F**			
itle							Follow	Up Date			06/21/12	14:00	6	8	
hone	718-111-1	111	E	đ			Next Ste			F/U v	vith pricing				1
-Mail	ELAB@T	RINITY.COM												0	4
Veb Url									Coourc	e	HIDA list				-
Opera	ator	Date	2	Time	Note	s/Text						Note#	1	of	3
CY		1		15:19	511 YE		e taking	over for Jo	e over the	e nex	t 3				
ontact	Larry Hu	1		1255 (0.1055)		Name and Address of the Owner, where the	desired and provide the	ached at .		Constant and the second	No.				88888
Action	100	D LETTER	05/0	5/12	and it is not it			next weel							Ø
					1		upplies.								Ø
															6
ustomer 9	Specific Area					-									8
	Custom Field				lhe	e Pro	ospec	t CRM	allow	/s t	or entry	of			- m
vanable (	custom Freid				not	tes a	nd fol	llow up	o infor	ma	tion				
usilahla (	Custom Field					.00 0									~
valiable	Lastom Field														~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
	с. <u>ст. н.</u>														
vallable (	Custom Field				767										888888
out to		or ch		1980-1991	_				XXXXXX	17		DAGE 4	0.E. 0		
Click on a	a field to upd	ate or OK/EN	D to Ac	cept					~~~~~			PAGE 1	OF 3		
Ord Entry	Prev Rec	Next Rec	Cred	Арр	Add Not	te I	Vids Inq	Cust Ord	l Cust	Hist	Quote	Quote Inq	E	Mail	Contac
HELP	OK/END	INSERT	LDEL	ETE	PREV P	GN	IEXT PG	INQUIRY	CAN	CEL	Off	2	12		Popu

# **Prospect File Detail**

ales Mana	agement Call Detail			Sism	001 SY	FERTIG			Tota	ป		6
rospect#	TRINITY		TRIN	ITY MEDI	ICAL CENTER	6			Curi	rent		4
itySt	STATEN ISLAND	NY	PRO	SPECT	Busin	ess Type	01	HOSPITALS				
ontact	JOE BUSH			4	Status	Code	PRO	PROSPEC	Г			
itle					Follow	v Up Date		06/21/12	14:00	8	8	
hone	718-111-1111	Ext		1	Next S	Step	F/U w	/ith pricing				2
-Mail	ELAB@TRINITY.COM										0	
Veb Url							ource	HIDA list				
Opera	ator Date	Ti	me	Notes/	Text				Note#	1	of	3
OSY	04/26/	12 15	i:19	Larry	Will be takin	g over for Joe (	over the nex	t 3				Ø
ontact	Larry Hursh			week	s. He can be	reached at Joe	e contact nui	nber.				6 6 6 6 6 6 6 6 6 6 6 6 6 6 6
Action	LT SEND LETTER	05/05/	12	He we	ould like a ca	ill next week a	bout getting	a				ι <b>ά</b>
				quote	on supplies.	15						6
												100
ustomer S	Specific Area			The	Droopo		allouro f	or optru	of			ιœ.
vailable (	Custom Field					ct CRM a		-	OI			(C)
				note	es and fo	ollow up i	informa	tion				ici i
vailable (	Custom Field					•						6
												(C)
vailable (	Custom Field			1.5								Ø
												Ø
	By using the full	Incti	on k	key Q	uote, a							Ø
Click on a	🔐 new quote can	be	aen	erate	d. To	KX	XXXXX		PAGE	1 OF 3		
			<b>U</b>			100	p.					
	review existing	-			-							
Ord Entry	🔚 Inq, will bring y	ou t	to th	e ne>	<u><t< u=""></t<></u>	Cust Ord	Cust Hist	Quote	Quote In 1	E	Mail	Conta
HELP	screen.					INQUIRY	CANCEL	Off	Quote III 1		man	Pop
A Market						Integentit	CHITCLE	- One				, opi

## Quote Inquiry

Customer Company lame Address 1	SCOTT A DKJFDK 1033 Rou	te 46		-	Phone# Contact Salesman Credit Limit			01			
address 2 City	CLIFTON		NY 11111		Credit Hold ALC Priority			N			
1.Line	Quote⊭	Cust Ref	0	dDt		Whs	ST	F	DS	0P	Order\$
1	01A00086			06/04		001	OP	N	ND	\$0	630.00
2										_	
3		5		_		a <u></u> 23	-			1	
4		-		_				-		-	
6		- (1		_		1	1	-		1	3 <mark></mark>
7											
8											
9											
10											
11						1			-		

### **Executive Inquiry Track Sales Calls**

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

C	o# 0'	I TSH Medical Company		lumber of Calls		# of Initial Ca	lle	
ŧ	Salesr	nan	Daily	MTD	YTD	Daily	MTD	YTD
1	001	SY FERTIG	1	4	4	0	3	
2	002	DAVID FERTIG	0	1	1	0	1	1
3	003	LISA FERTIG	0	1	1	0	1	į
4	004	INHOUSE SALES	0	0	0	0	0	
5	005	KEVIN LYNCH	0	0	0	0	0	
6	006	RETAIL SALES	0	0	0	0	0	
7	007	GUS VELEZ	0	0	0	0	0	
8						1. La		
9								
0								
1								
2								
3								
4								

### **Executive Inquiry Sales by Rep**

🐐 Elle Edit Settings Reset Toos GUI Standard Functions Special Functions Help

		E	xecutive Inquiry - Sal As of Fiscal Period			1205		
Co#	01 TSH Medica	l Company	_					
5/19V			Mon		CDAL	Year	to Date	CRM
Sales			Sales	Profit	GP%	Sales	Profit	GP%
01	SY FERTIG		34665.70	13917.53	40.15	265011.21	104407.08	39.40
02	DAVID FERTIG		53294.59	22870.00	42.91	433046.50	200000.00	46.18
03	LISA FERTIG		68268.71	20005.14	29.30	530184.30	220005.14	41.50
04	INHOUSE SALES		-26187161.29	-7875272.10	30.07	-25910105.91	-7875272.10	30.39
05	KEVIN LYNCH		12776.74	6054.22	47.38	158774.65	60876.55	38.34
06	RETAIL SALES		3750.84	1489.80	39.72	49085.73	20562.05	41.89
07	GUS VELEZ		37.64	15.00	39.85	37.64	15.00	39.85
	-		0.00	0.00	0.00	0.00	0.00	0.00
			0.00	0.00	0.00	0.00	0.00	0.00
			0.00	0.00	0.00	0.00	0.00	0.00
			0.00	0.00	0.00	0.00	0.00	0.00
			0.00	0.00	0.00	0.00	0.00	0.00
			0.00	0.00	0.00	0.00	0.00	0.00
			0.00	0.00	0.00	0.00	0.00	0.00
		Totals	-26014367.07	-7810920.41	30.03	-24473965.88	-7269406.28	29.70
Ente	r END to Exit	XXXXXX					120010020	10110
HEL	P OK/END	Print Sun INSERT LDELETE	The Action of Contract of Contract	Calls XT PG INQUIRY	CANCE	. Off		Рори

- 8 ×

### **Email Blasting**

- How to create a Blast
- Creating Contact List
- Adding notes to all contacts
- Setting Follow-up Dates

## **Creating a List**

🐐 📶 Edit Settings Reset Tools GUI Standard Functions Specia Functions Help

Prosp SIs	001	Sales	nan-001		Sales	Management	Prospect Cal	l (Summ	narv)			
Prospect	Contraction of the second	Lindole Lindol		To	10,001,000		51,575 <b>,</b> 675,575,575	en Nameran		n list		11
Prospect		-									H	
State Ran				To		Ac	tion	141			11	
Zip Code	98.00 			To		Lis	Nexus 1	1511			1	
Phone Nu	ımber	-		1		-2						
Follow Up	o Dt	-		То								
Status		-			Source				_			
Business		-			Notes							
						-				Follow	Up	
Ln#	Prospect #		Name			City		St	Stat	Date	20040	Time
1.	RICH		John Smith In	ic.		MONORE		NY	ABC			
2.	KESSLER		KESSLER			EAST ORAN	IGE	NJ	OPN			
3.	TJZNEW2		New York Gia	ints		CITY		NJ	ABC			
4.	BENJI5		The New York	< Yankees		CLIFTON		NJ	OPN			
5.	BENJI4		The Simpson	Group		CLIFTON		NJ				
6.	ME1		The Systems	Group		F		NY				
7.	TJZNEW		Tom Harris In	c.		1		NJ	55			
8.	BENJI3		BENJI Medica	d Inc.		CLIFTON		NJ	OPN	0	1/29/07	
9.	BENJI1		Lodus Medica	al Supply		CLIFTON		NJ	OPN	0	3/08/07	14:30
10.	europa		Europa Crysta	al Sculptures		St Paul		MN	OPN	0	7/30/07	
11.	TRTEST		ABC COMPAN	IY INC		CLIFTON		NJ	55	0	9/11/07	
Enter Sa	ave List Name		June Blast									
			20						/			
Pros Look		Search	Action	Get List	Mds inq	Cust Ord	Cust Hisl	Add No	te	Save List		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off				Popup

- 8 ×

#### Help in Creating Email 🙀 File Edit Settings Reset Tools GUI Standard Functions Special Functions Help. $-\mathbf{x}$ GENERAL HELP You will need to have an email template in the form.archive.blast End Help folder prior to sending your emails. The following keywords are replaced in the email body: Inquiry [TITLE] = Prospects Contact Title [COMPANY] = Company/Prospect Name [CITY.SZ] - Prospect City/State/Zip 1.Enter Html F [ADDRESS] = Prospect Address Line 1 2.Enter Text F [FNAME] = Prospect First Name 3.Enter Attach [CUST.NAME] = Prospect Contact Name

ILenter Attach
[EMAIL.ADDR] = Prospect Contact Email Address
ALEnter Attach
Please note:
Each contact in the prospect record will receive a separate email

5.Enter Prospe

6.Enter List of Prospects or 'ALL'

7.Enter Email Subject

8.Enter Sender Address

9.Enter Sender Name

ENTER LIN	E # TO CHAN	NGE,DELETE	TO DELETE,0	TO ACCEPT			×	XXXXX		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off		Popup
/		and the second second		12.2			1.000		222-21	

### Information for body of blast

[COMPANY] [FNAME] [CUST.NAME]

Please Note: Please find the June special attached for your supply needs.

### Save the document as an HTML document

## Template to Fill Contact Information from Prospect File

1.Enter Html File Name		
2.Enter Text File Name	juli!55011!16202!BLAST.TEMPL!TOMBLAST.htm	
3.Enter Attachment #1	File Name	
4.Enter Attachment #2	<pre>sostro!59764!16202!BLAST.TEMPL!flyer.xml tomz!30418!16203!BLAST.TEMPL!TEST3.HTML tomz:30432!16203!BLAST.TEMPL!PROSPECT.txt</pre>	
5.Enter Prospect Code 6.Enter List of Prospects or 'ALL'	tomz:30512!16203!BLAST.TEMPL:PROSPECTweb.htm tomz:30523:16203:BLAST.TEMPL:PROSPECT.txt tomz:30546!16203:BLAST.TEMPL:CRS117416.docx tomz:30552!16202:BLAST.TEMPL:TZQP4.txt tomz:34449!16203:BLAST.TEMPL:SRTEST.jpg	
7.Enter Email Subject	tomz!37751!16202!BLAST.TEMPL!TZQP.txt tomz!47915!16202!BLAST.TEMPL!TZUPLOAD.txt tomz!49763!16202!BLAST.TEMPL!csc.whse.txt tomz!49819!16202!BLAST.TEMPL!1stext.txt	
8.Enter Sender Address		
9.Enter Co	ntextual Help	
Choose a template by clicki		

### **Acquiring Attachment**

🙀 Eile Edit Settings Reset Tools GUI Standard Functions Special Functions Help

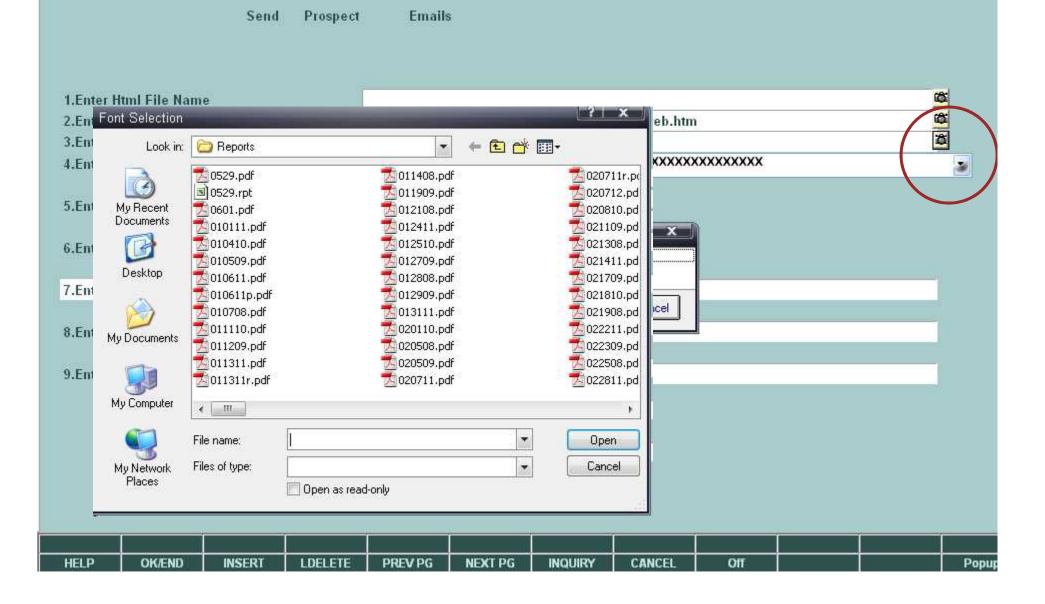
Send Pr	ospect Emails	
1.Enter Html File Name		Ø
2.Enter Text File Name	tomz!30512!16203!BLAST.TEMPL!PROSPECTweb.htm	1
3.Enter Attachment #1		
4.Enter Attachment #2	*****	3
5.Enter Prospect Code		
6.Enter List of Prospects or 'ALL'	Choose Source:	
7.Enter Email Subject		
8.Enter Sender Address	OK Cancel	
9.Enter Co	ontextual Help	

Choose a template by clicking on the inquiry button or choose OK/END and then click on the camera icon to upload a nu template.

					ļ.					
HELP	OKÆND	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off		Popup

### **Acquiring Attachment**

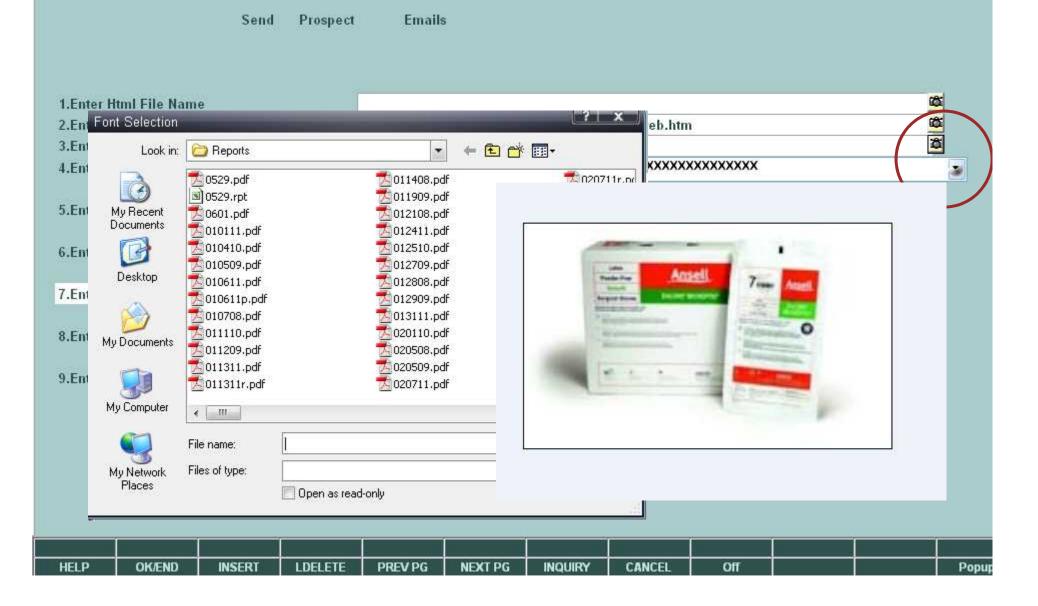
🙀 Eile Edit Settings Reset Tools GUI Standard Functions Special Functions Help



-

### **Acquiring Attachment**

🙀 Eile Edit Settings Reset Tools GUI Standard Functions Special Functions Help



- 4

### **Complete Blast to Send**

🐐 Ele Ecit Settings Reset Tools GUI Standard Functions Specia Functions Hep

2.Enter Text File Name     Image: Content of the second seco	Send Pros	spect Emails	
5.Enter Prospect Code         6.Enter List of Prospects or 'ALL'         SCOTT         7.Enter Email Subject         Monthly Special         8.Enter Sender Address	1.Enter Html File Name	tomz!30377!16221!BLAST.TEMPL!TEST3.HTML	
5.Enter Prospect Code         6.Enter List of Prospects or 'ALL'         SCOTT         7.Enter Email Subject         Monthly Special         8.Enter Sender Address	3.Enter Attachment #1	Ansell_EncoreMicrOpticSFT_high.JPG	
6.Enter List of Prospects or 'ALL'     SCOTT       7.Enter Email Subject     Monthly Special       8.Enter Sender Address     sostro@tshinc.com	4.Enter Attachment#2		<u></u>
7.Enter Email Subject     Monthly Special       8.Enter Sender Address     sostro@tshinc.com	5.Enter Prospect Code		
8.Enter Sender Address sostro@tshinc.com	6.Enter List of Prospects or 'ALL'	SCOTT	
	7.Enter Email Subject	Monthly Special	
9.Enter Sender Name Scott Ostro	8.Enter Sender Address	sostro@tshinc.com	
	9.Enter Sender Name	Scott Ostro	

- 8 ×

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	н	i i i	Popup

Blast I	E-mail	Examp	le
		Елептр	

🖃 <u>S</u> end   ((	🔹 🛄 🍇 🛃 🤰 🐺 🏠 👔 Options 🍝 HTML 🔹	
<b>₩</b> °o, .		
🛄 Cc		
Subject:	FW: June Special	
Attach	🗊 Untitled attachment 00132.txt (78 B); 🖻 sostro!57617!16227!BLAST TEMPL!Ansell EncoreMicrOpticSFT high.JPG (16 K3)	📳 Attachment Optons

From: Scott Ostro [mailto:sostro@tsh] Sent: Monday, June 04, 2012 4:03 PM To: JULI@TBHINC.COM Subject: June Special

The Systems House TOM SMITH

Flease Note: Please find the June special attached for your supply needs.

This email has been scanned by the Outbound TSH Mail Filter Please Report any issues to support@tshinc.com

This email has been scanned by the Inbound TSE Mail Filter Flease Report any issues to support@tshinc.com

### Adding a note to all selected Prospects

🗲 Eile Ecit Settings Reset Cools GUI Standard Functions Specia Functions Lelp												- 8 ×
		8.7										
Prosp Sls	12	Sales	The second se			s Management Prospect Call (Summary)						
Prospect #		To			# in			list	11			
Prospect Name							100					
State Range			Τu		Actio	an 📃	5					
Zip Code			To		List	2						
Phone Number												
Follow Up Dt			To									
Status					Source	1						
Business				Notes	1							
										Follow Up		
∣n#	Prospect#		Name			City		St	Stat	Date	Time	
1.	RICH		John Smith I	nc.		MONORE		NY	ABC			-
2.	KESSLER		KESSLER			EAST ORANGE		NJ	0PN		14	
3.	TJZNEW2		New York Giants			CITY		NJ	ABC			
4.	BENJI5		The New York Yankees			CLIFTON		NJ	0PN	5		
5.	BENJI4		The Simpson Group			CLIFTON		NJ			10	
б.	MF1		The Systems Group			F		NY				
7.	TJZNEW		Tom Harris II	NC.		1		NJ	55	8		
8.	BENJI3		<b>BENJI</b> Medic	al Inc.		CLIFTON		NJ	0PN	01/29/07		
9.	BENJI1		Lodus Medical Supply			CLIFTON		NJ	0PN	03/08/07	14:30	
10.	europa		Europa Crystal Sculptures			St Paul		MIN	0PN	07/30/07		
11.	TRTEST		ABC COMPANY INC			CLIETON		NJ	55	09/11/07		
Enter N	ote June F	last										
Pros Look	Kes#days	Search	Action Get List Mds Ing			Cust Ord Cust Hist Add Note			te 🛛 S	Save List		
HELP	OK/END	INSERT	LUELETE	PREVPG	NEXT PG		CANCEL	UIT			e e	'apup

### Thank You

### **Questions and Answers?**

