Sales Management Guide

08/06/15 Sales Management Training Guide 1

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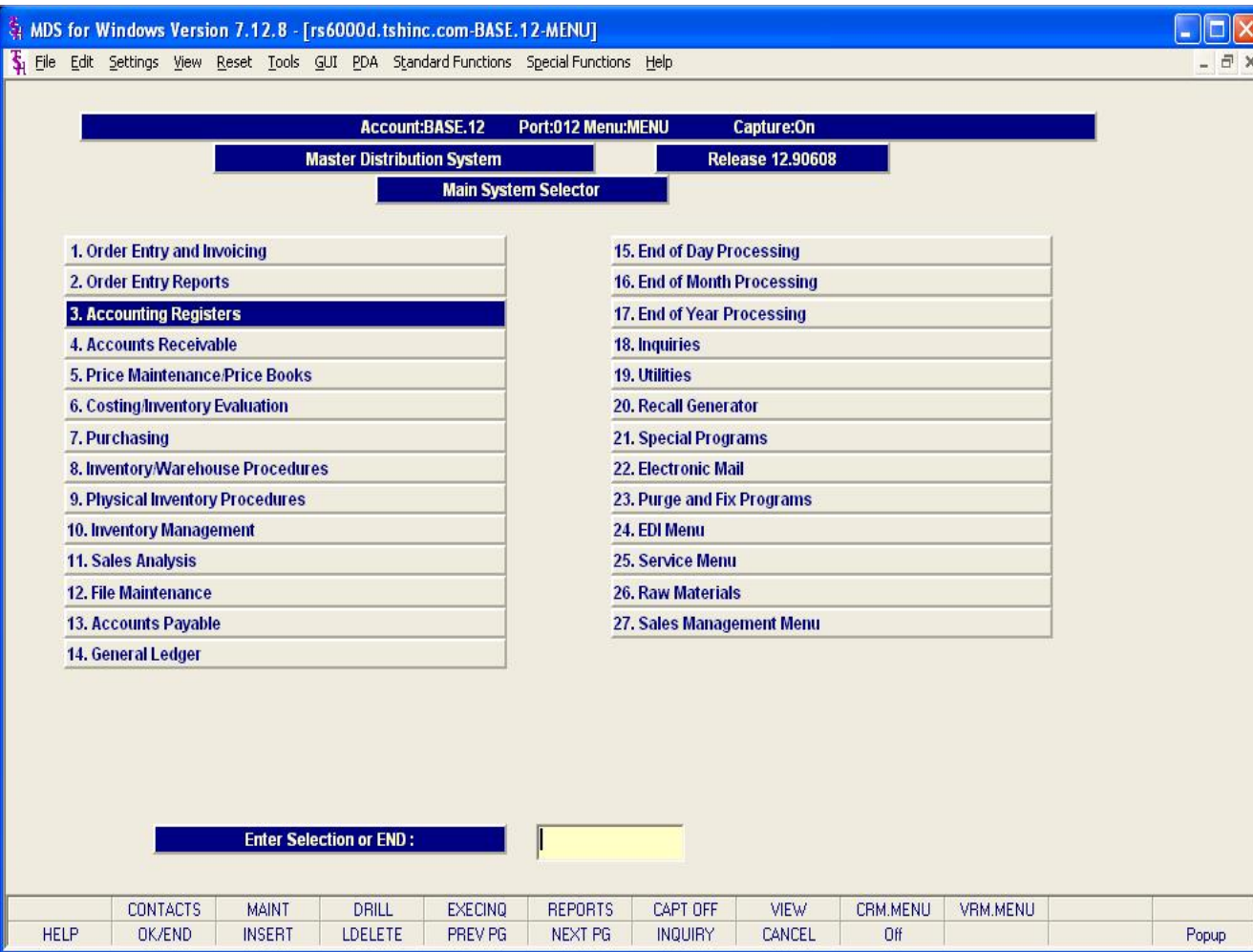
Overview – Sales management involves automating and integrating every aspect of the prospect relationship so that the prospect's information passes smoothly from individual to individual, and the sales rep now dealing with the prospect has at his or her fingertips all the information required to properly service the prospective client.

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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:
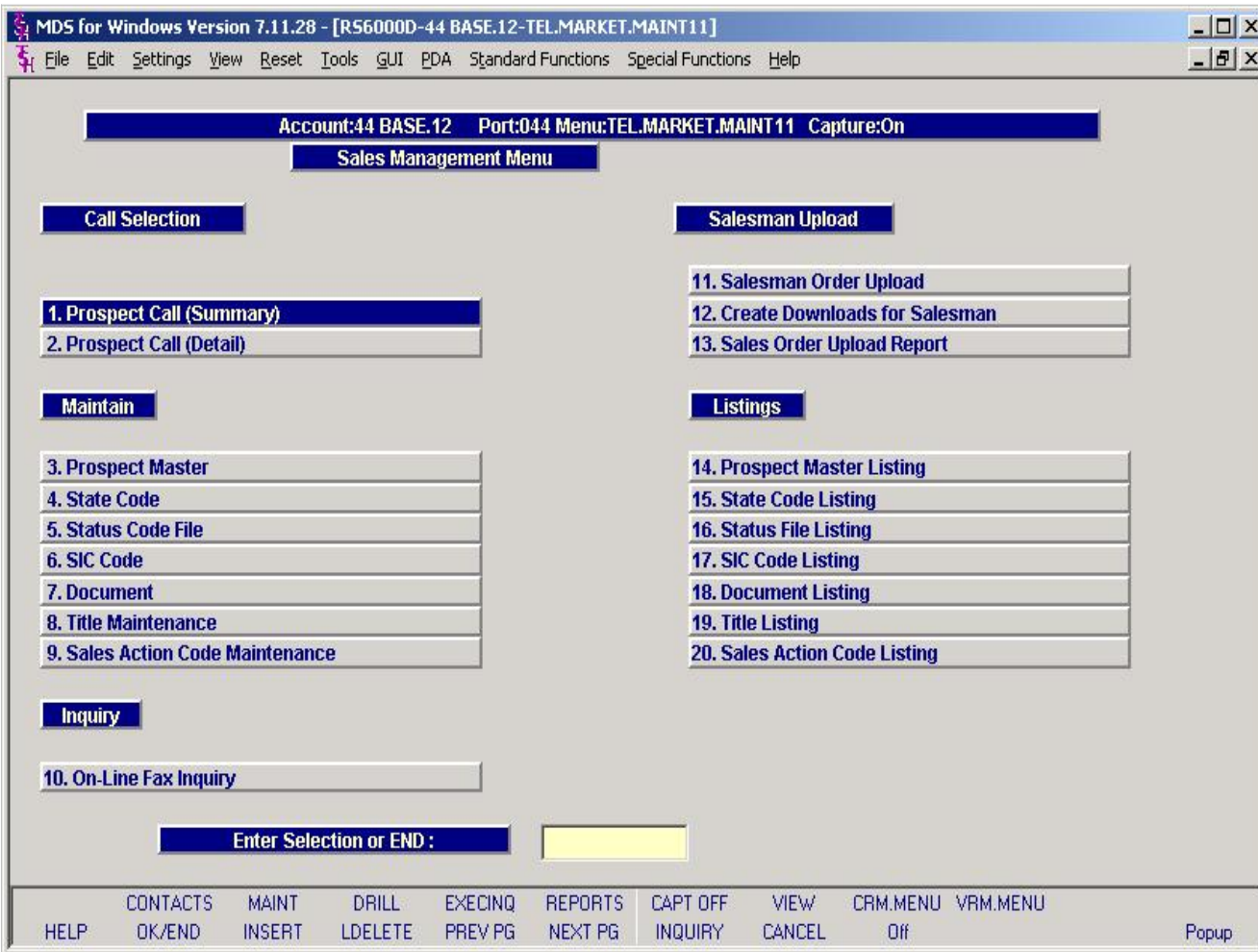
HELP - The HELP function is available by clicking on the 'HELP' icon or by pressing the <F1> function key. Help text is setup as two layers. By pressing 'F1' at the first field on the screen, an overall description of the master file will be displayed. If 'F1' is pressed at a specific field within the 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.
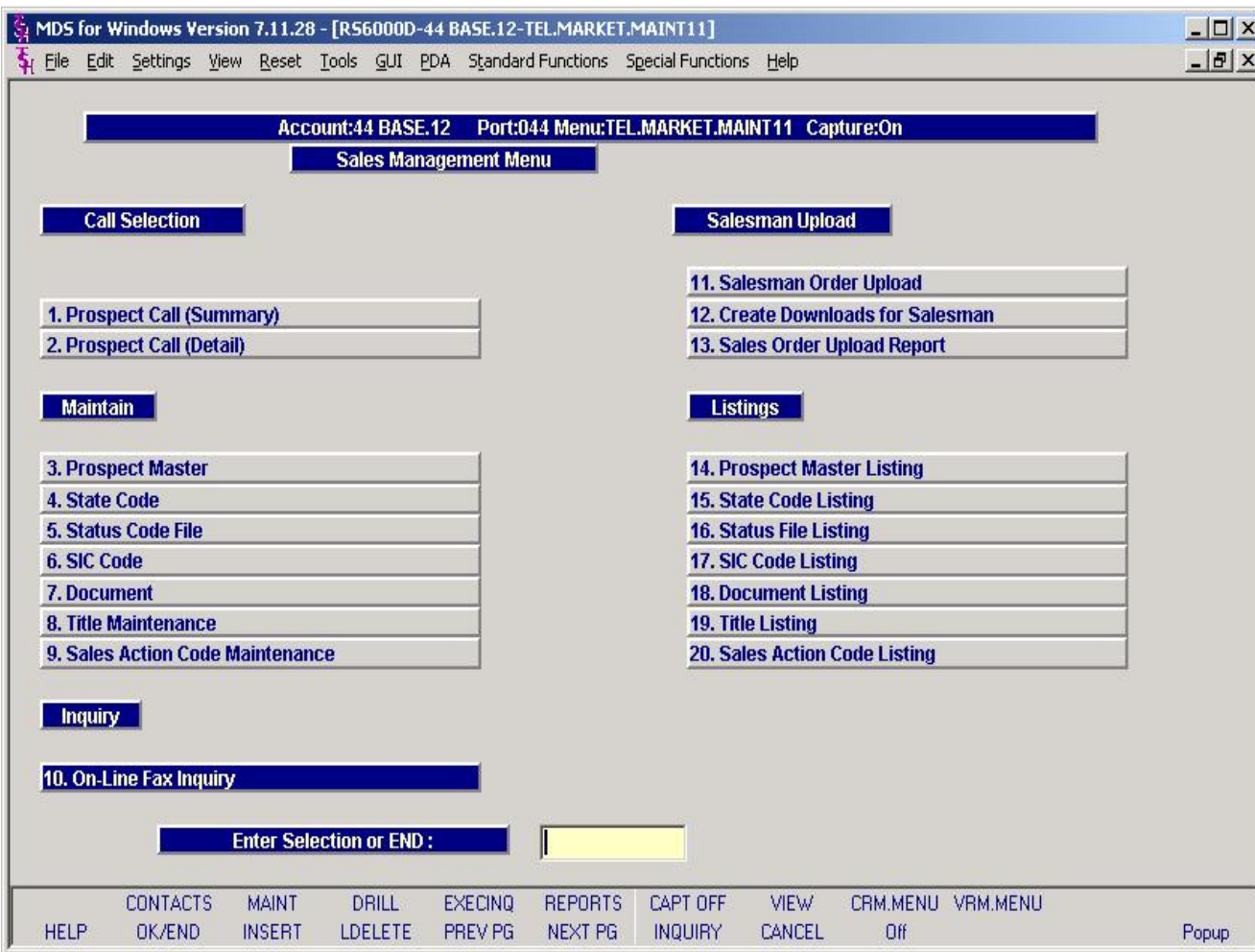
INSERT – The INSERT function is available by clicking on the 'INSERT' icon or by pressing the 'F3' function key. The INSERT mode feature allows insertion of letters or numbers into existing text.

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.

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MDS for Windows Version 7.11.28 - [RS6000D-44 BASE.12-TEL.MARKET.MAINT11]         _ □ ×
File  Edit  Settings  View  Reset  Tools  GUI  PDA  Standard Functions  Special Functions  Help    _ ₆ ×

         Account:44 BASE.12    Port:044 Menu:TEL.MARKET.MAINT11  Capture:On
                         Sales Management Menu

  Call Selection                                    Salesman Upload

                                            11. Salesman Order Upload
  1. Prospect Call (Summary)                 12. Create Downloads for Salesman
  2. Prospect Call (Detail)                  13. Sales Order Upload Report

  Maintain                                          Listings

  3. Prospect Master                         14. Prospect Master Listing
  4. State Code                              15. State Code Listing
  5. Status Code File                        16. Status File Listing
  6. SIC Code                                17. SIC Code Listing
  7. Document                                18. Document Listing
  8. Title Maintenance                       19. Title Listing
  9. Sales Action Code Maintenance           20. Sales Action Code Listing

  Inquiry

  10. On-Line Fax Inquiry

               Enter Selection or END : [          ]

        CONTACTS    MAINT    DRILL    EXECINQ   REPORTS   CAPT OFF   VIEW    CRM.MENU  VRM.MENU
  HELP   OK/END    INSERT   LDELETE   PREV PG   NEXT PG   INQUIRY   CANCEL     Off              Popup
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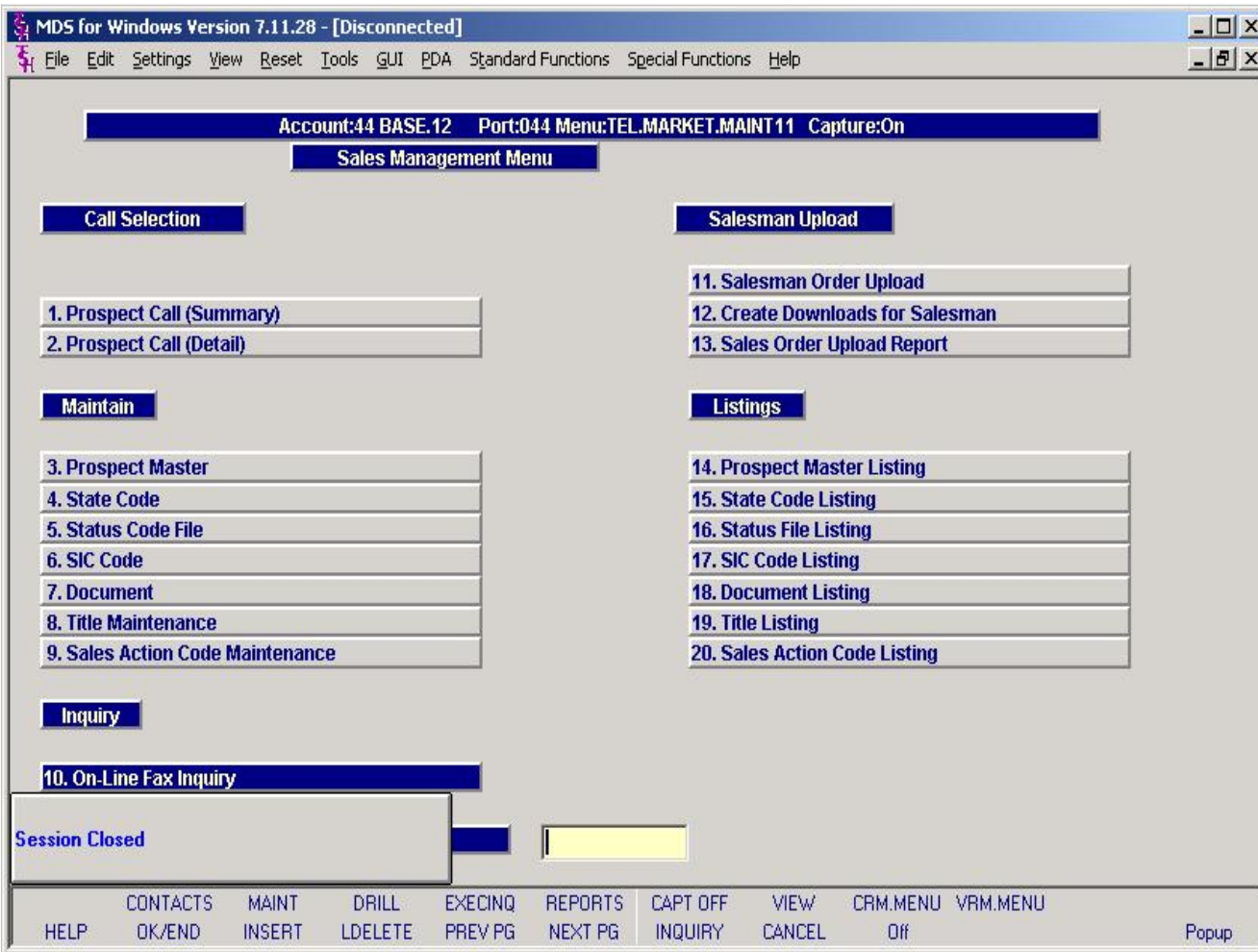## Master File Maintenance Function Keys

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.

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.

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MDS for Windows Version 7.11.28 - [Disconnected]

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

Account:44 BASE.12   Port:044 Menu:TEL.MARKET.MAINT11 Capture:On

Sales Management Menu

Call Selection

1. Prospect Call (Summary)
2. Prospect Call (Detail)

Maintain

3. Prospect Master
4. State Code
5. Status Code File
6. SIC Code
7. Document
8. Title Maintenance
9. Sales Action Code Maintenance

Inquiry

10. On-Line Fax Inquiry

Session Closed

Salesman Upload

11. Salesman Order Upload
12. Create Downloads for Salesman
13. Sales Order Upload Report

Listings

14. Prospect Master Listing
15. State Code Listing
16. Status File Listing
17. SIC Code Listing
18. Document Listing
19. Title Listing
20. Sales Action Code Listing

	CONTACTS	MAINT	DRILL	EXECINQ	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU	
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off		Popup

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 Shift+'F10' function key. This will forward the user to the Vendor Relationship Management menu.

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MDS for Windows Version 7.11.28 - [RS6000D-13 BASE.12-MENU]                    _ □ ×
 File  Edit  Settings  View  Reset  Tools  GUI  PDA  Standard Functions  Special Functions  Help    _ 🗗 ×

              Account:13 BASE.12    Port:013 Menu:MENU       Capture:On
                    Master Distribution System              Release 12.90502
                           Main System Selector

     1. Order Entry and Invoicing              15. End of Day Processing
     2. Order Entry Reports                    16. End of Month Processing
     3. Accounting Registers                   17. End of Year Processing
     4. Accounts Receivable                    18. Inquiries
     5. Price Maintenance/Price Books          19. Utilities
     6. Costing/Inventory Evaluation           20. Recall Generator
     7. Purchasing                             21. Special Programs
     8. Inventory/Warehouse Procedures         22. Electronic Mail
     9. Physical Inventory Procedures          23. Purge and Fix Programs
    10. Inventory Management                   24. EDI Menu
    11. Sales Analysis                         25. Service Menu
    12. File Maintenance                       26. Raw Materials
    13. Accounts Payable                       27. Sales Management Menu
    14. General Ledger


                   Enter Selection or END :         [        ]

         CONTACTS   MAINT    DRILL    EXECINQ   REPORTS  CAPT OFF    VIEW    CRM.MENU  VRM.MENU
  HELP    OK/END   INSERT   LDELETE   PREV PG   NEXT PG  INQUIRY   CANCEL      Off                  Popup
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Sales Management Menu

The sales management menu can be found from the main system selector.

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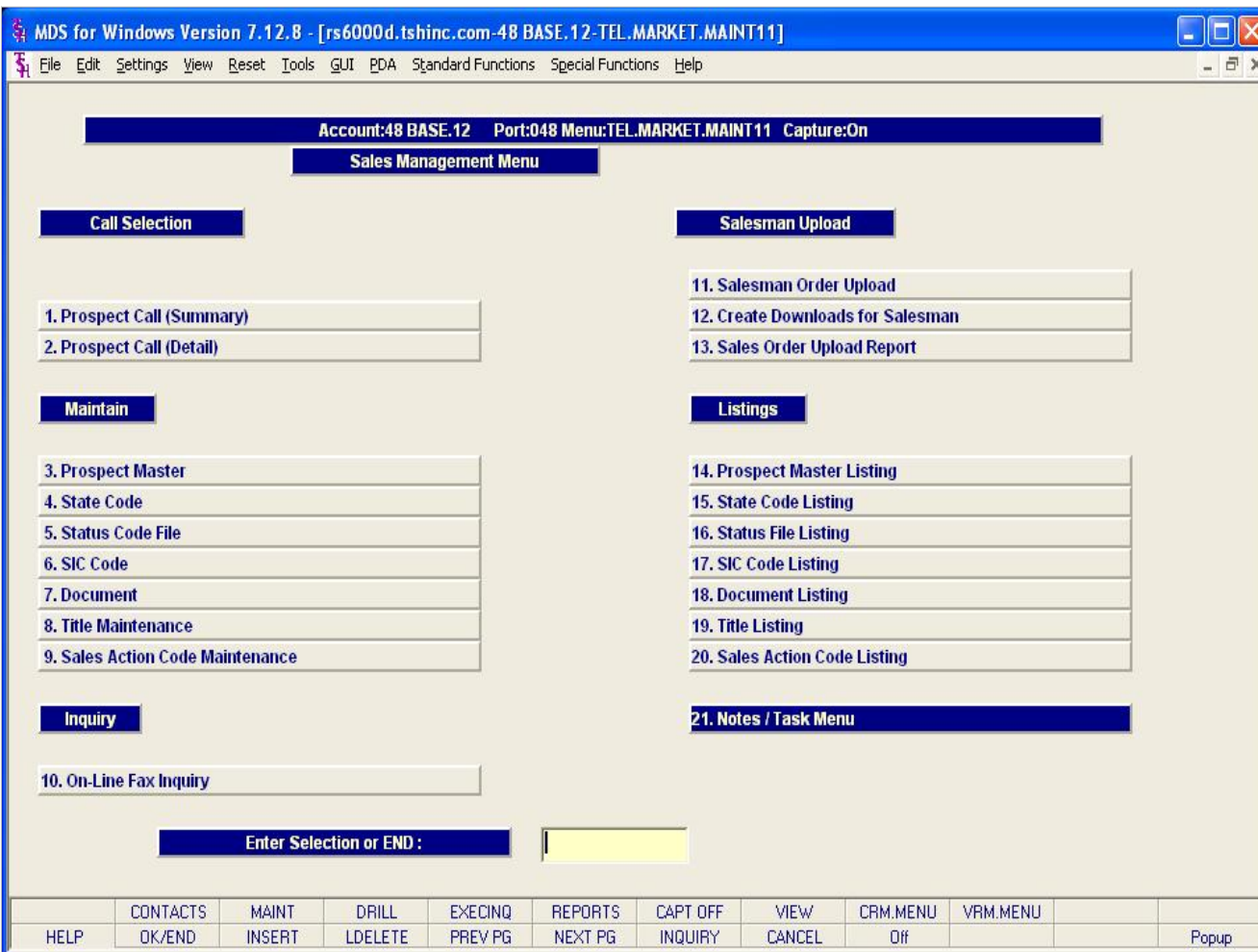
Sales Management Guide

The sales management menu provides access to many sales management features.

The salesman upload functionality will not be addressed in this training guide. Please see the salesman laptop guide for more information.

The notes/task menu will be covered in the customer relationship management guide.

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Prospect Maintenances

Maintenances must be performed to enter prospect call details. Some maintenances must be performed before you can enter a new prospect into the prospect master maintenance. A valid Prospect Master record is required to enter call details.

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Prospect Master Maintenance

The prospect master is dependent on the state code and status codes they are required fields and must be entered before completing a new Prospect Master record. If optional maintenances have not been performed the fields and inquiries that are available may not be used until they are completed.

Ex Prospect # -At the prospect number prompt you can enter the prospect number, enter the beginning prospect number to initiate the lookup routine, click on the "INQUIRY" icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Name – This is a required field. Enter the prospect name.

Address1 – Enter the first line of the address field for the prospect

Address2 –Additional lines for entering the prospect address are provided.

Address3 - Additional lines for entering the prospect address are provided.

City –Enter the city where the prospect company resides. Enter the state, and zip code of the prospect address.

Slsmn – Enter the salesman code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the salesman code.

Business –This field is populated from the customer class it is the same field for customer class that is found in the Customer Master file. Enter the business code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the business code.

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Prospect Master Maintenance

Comments – This is a text entry field you may enter in any comments you may have about the prospect in general.

Phone# - Enter the phone number for the prospect

Fax# - Enter the fax number for the prospect

E-Mail – Enter an email address for the prospect

WebUrl – Enter the corporate website address for the prospect

SIC Code – Enter the standard industry code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the standard industry code.

Contact1 – Enter the name of the contact for the prospect.

Title1 – Enter the title of the contact for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the title.

Contact2 – Enter the name of an additional contact for the prospect.

Title2 - Enter the title of the additional contact for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the title.

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Prospect Master Maintenance

PROSPECT MASTER MAINTENANCE

Ex Prospect#   UMC   100139

18.Lead Source
19.Current System
20.Number of Users
21.Sales Dollars   0.00
22.Number of Employees
23.Close Date
24.Probability of Close
25.Proposal Date
26.Competition
27.Next Step

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :   XXXXXX   PAGE 2 OF 2

| HELP | OK/END | INSERT | LDELETE | PREV PG | NEXT PG | INQUIRY | CANCEL | Off | | | UserFile |
Popup

Status Cd – Enter the status code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the status code.

Follow Up – Enter a date to follow up with the prospect. This date will be used on the prospect call summary inquiry to determine prospects to follow up with by date.

Lead Source – Enter the information of where the lead was generated an example would be the name of a trade show, website, or direct marketing.

Current System – Enter the name of the system the prospect is now using.

Number of Users – Enter the number of users that the prospect currently includes in their system use.

Sales Dollars – Enter the number of sales dollars that prospect produces each year.

Number of Employees – Enter the number of people that the prospect employs.

Close Date – Enter the close date of the prospect for example the date the sale was completed or rejected.

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PROSPECT   MASTER   MAINTENANCE

Ex Prospect#   UMC   100139

18. Lead Source
19. Current System
20. Number of Users
21. Sales Dollars   0.00
22. Number of Employees
23. Close Date
24. Probability of Close
25. Proposal Date
26. Competition
27. Next Step

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :   XXXXXX   PAGE 2 OF 2

| HELP | OK/END | INSERT | LDELETE | PREV PG | NEXT PG | INQUIRY | CANCEL | Off | | | UserFile |
| | | | | | | | | | | | Popup |

Prospect Master Maintenance

Proposal Date – Enter the date that the proposal was sent to the prospect.

Competition – Enter the names of any direct competitors that the prospect is considering.

Next Step – Enter the next step to take in the sales cycle.

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.

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

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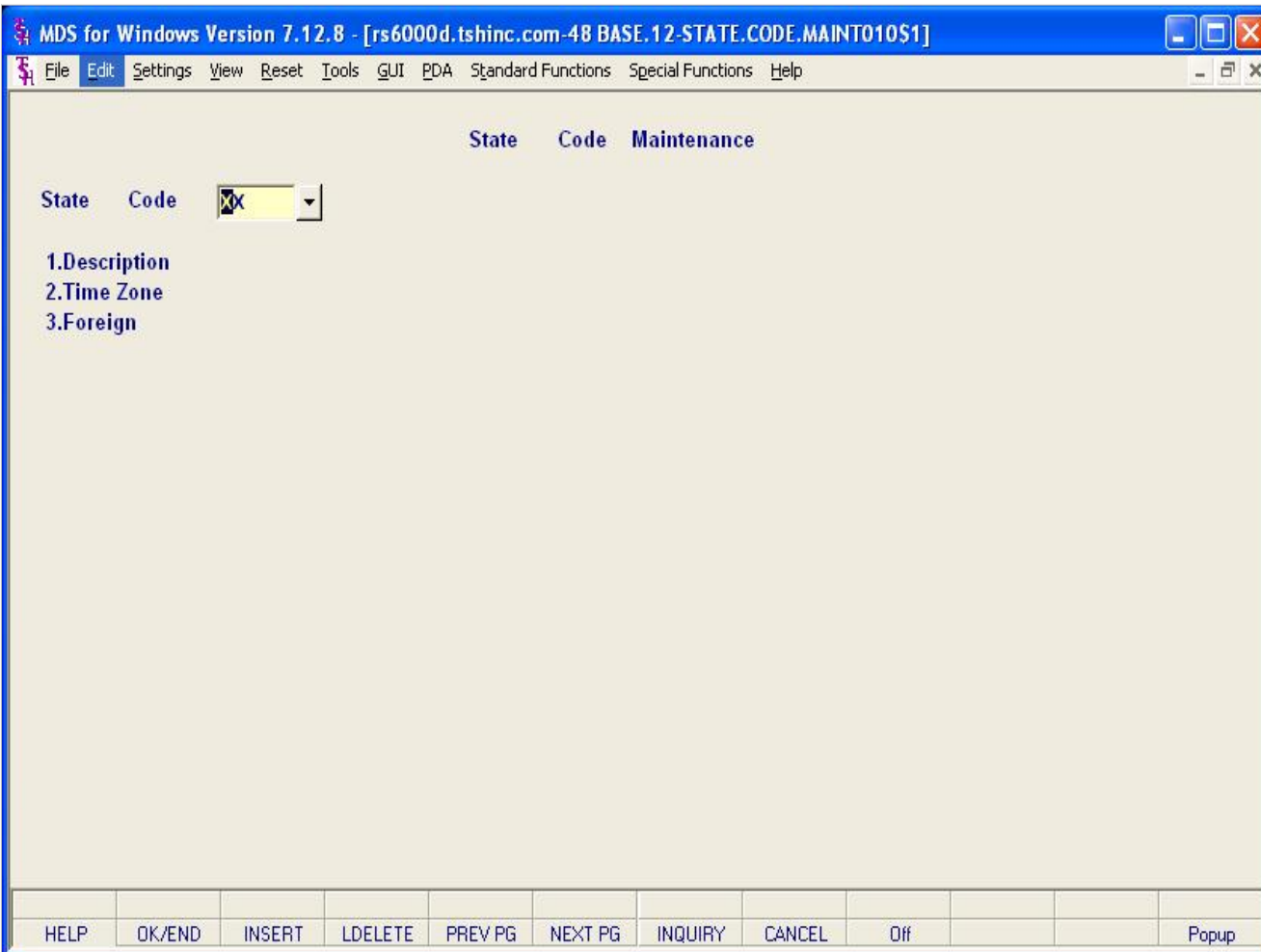
State Code Maintenance

State code maintenance is required to enter a new prospect in the prospect master maintenance. In many cases the state codes are preloaded with your system install. Please verify they are available.

State Code - Enter the state code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the state code.

Description – Enter the description for the state code.

Time Zone – Enter the time zone for this state. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the time zone.

Foreign – Enter "Y" or "N" to specify if the state code is foreign.

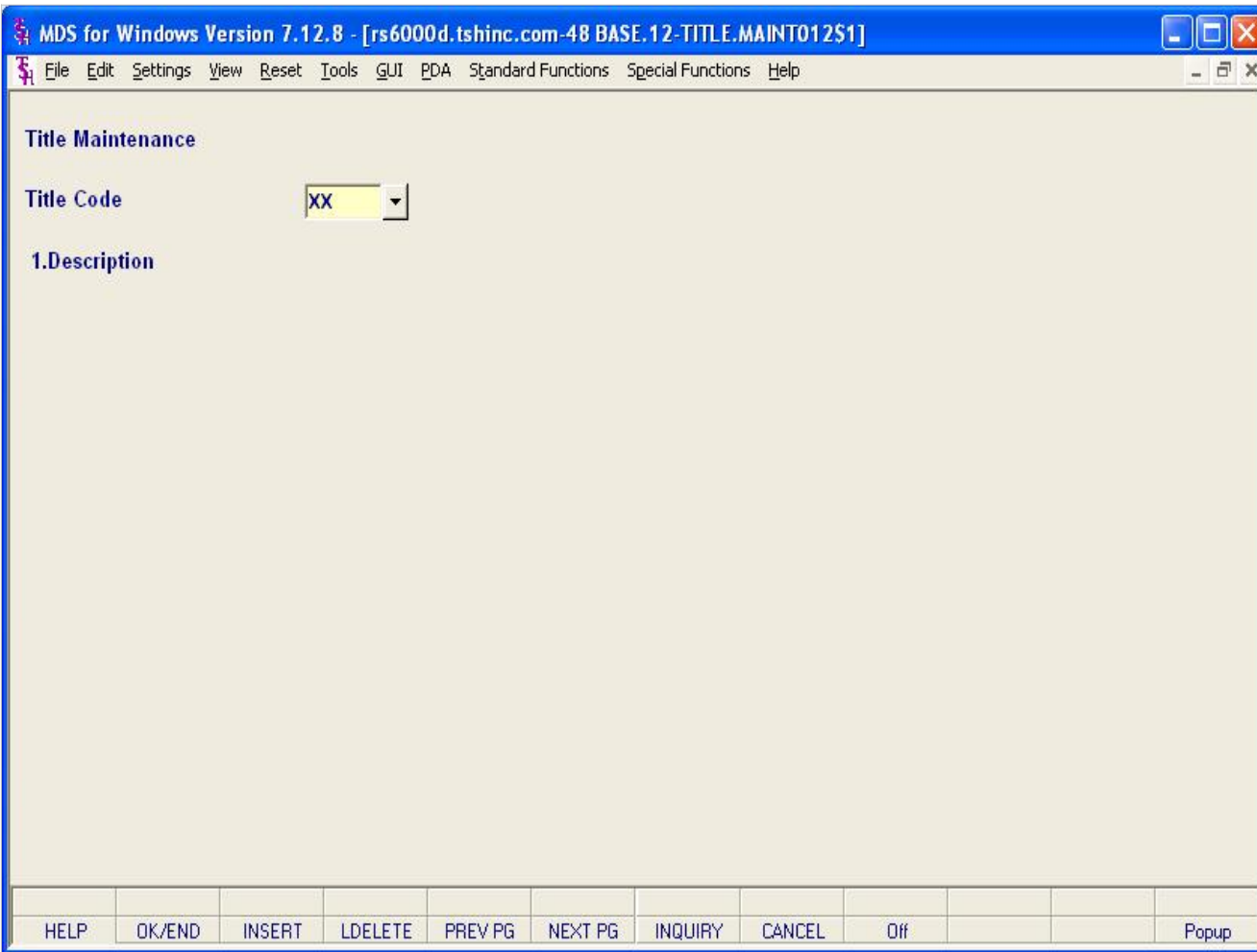ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

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.

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

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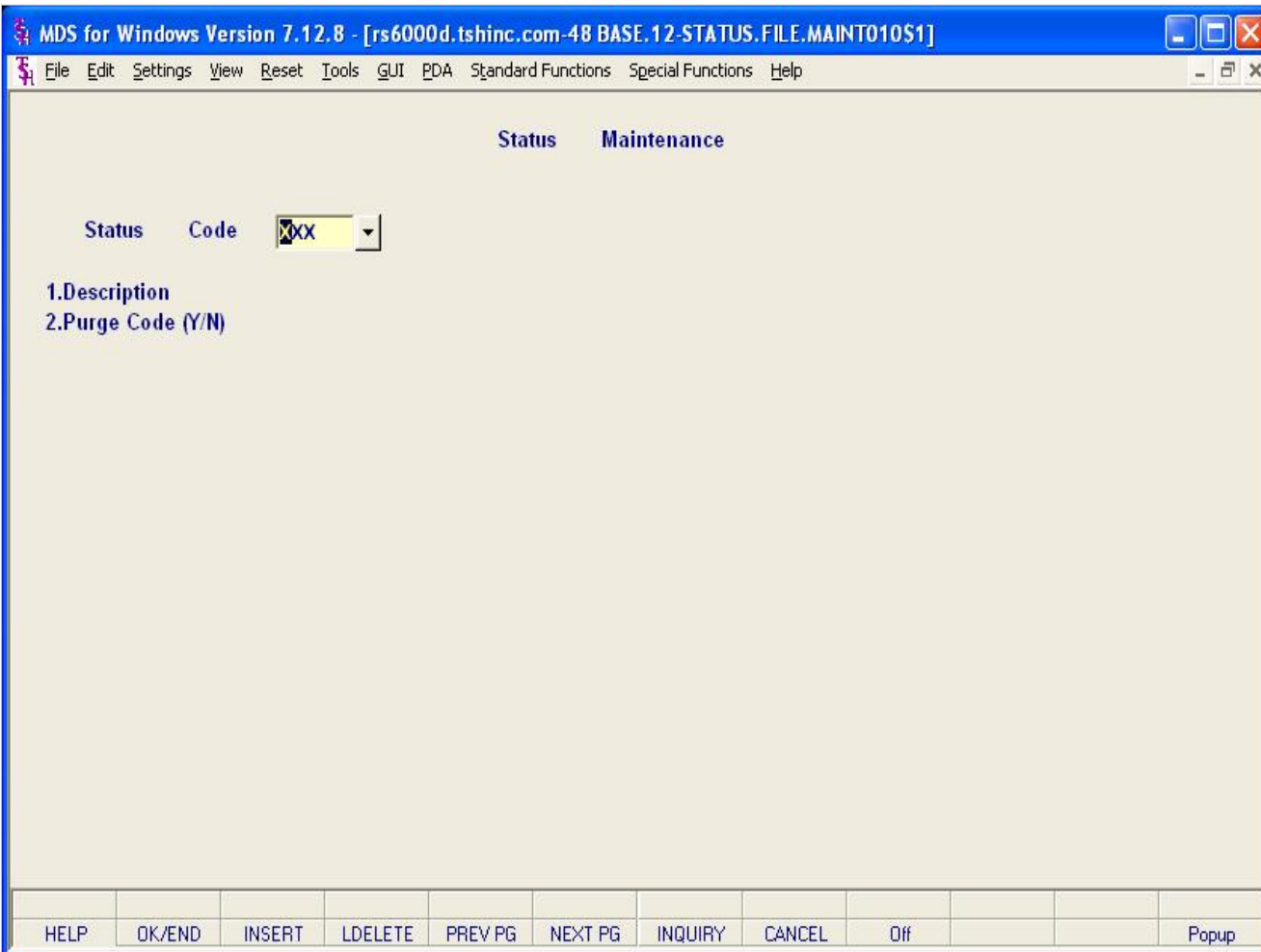
Status Code Maintenance

Status code maintenance is required to enter a new prospect in the prospect master maintenance

Status Code - Enter the 1,2, or 3 digit status code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the status code.

Description – Enter the description for the status code.

Purge Code (Y/N) – Enter "Y" or "N" for the purge code. The default is "N" The purge code will be used to identify a specific status code as ready to be deleted from the system.

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.

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

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SIC Code Maintenance

Standard industry code is not a required field for the prospect master maintenance.

SIC Code – Enter the standard industry code for this prospect. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the standard industry code.

Description – Enter the description for the standard industry code.

Short Desc. – Enter the short description for the standard industry 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.

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

Sales Management Training Gui   15

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Document Maintenance

Document maintenance is not required to enter a new prospect. Document maintenance allows a user to define each document that will be faxed. You cannot fax the document without defining it in document maintenance.

Document Name - Enter the document name. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for an existing document.

Description – Enter the description for the document.

Location of Document – Enter the location of where your document exists on your server.

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.

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

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Title Maintenance

Title maintenance is not a required field for entering a new Prospect Master record. Title maintenance allows the user to define a title for each contact in the Prospect Master records.

Title Code - Enter the 1, or 2 digit title code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the title code.

Description – Enter the description for the title 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.

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

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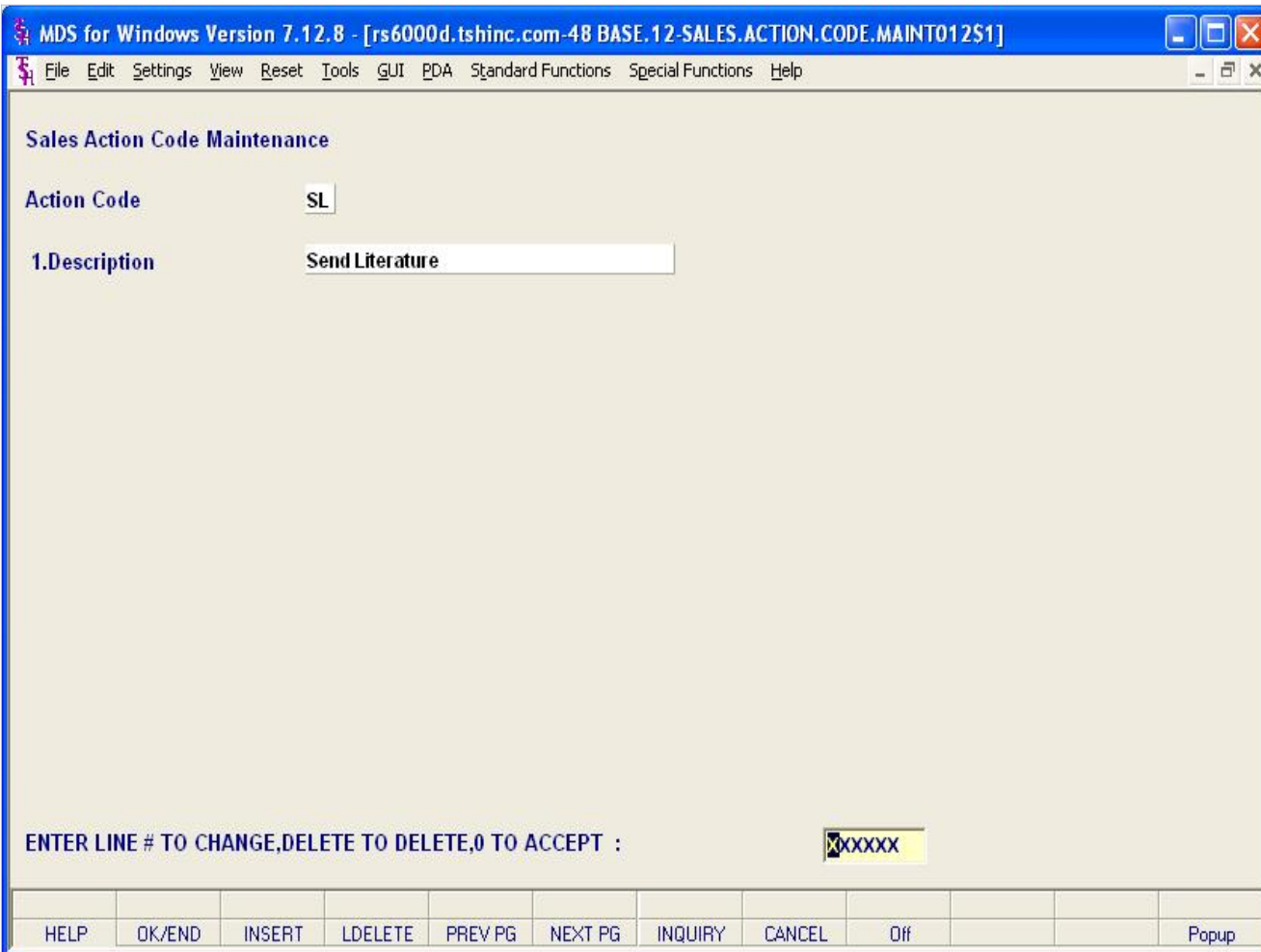
Sales Action Code

Sales action code's are not required to enter a new prospect or a new Prospect Call Detail record. Sales action code's can be used to filter prospects in the prospect call summary inquiry. The sales action code maintenance provides a brief description for the next action to be taken in the sales process.

Action Code - Enter the 1 or 2 digit sales action code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the sales action code.

Description – Enter the description for the sales 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.

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

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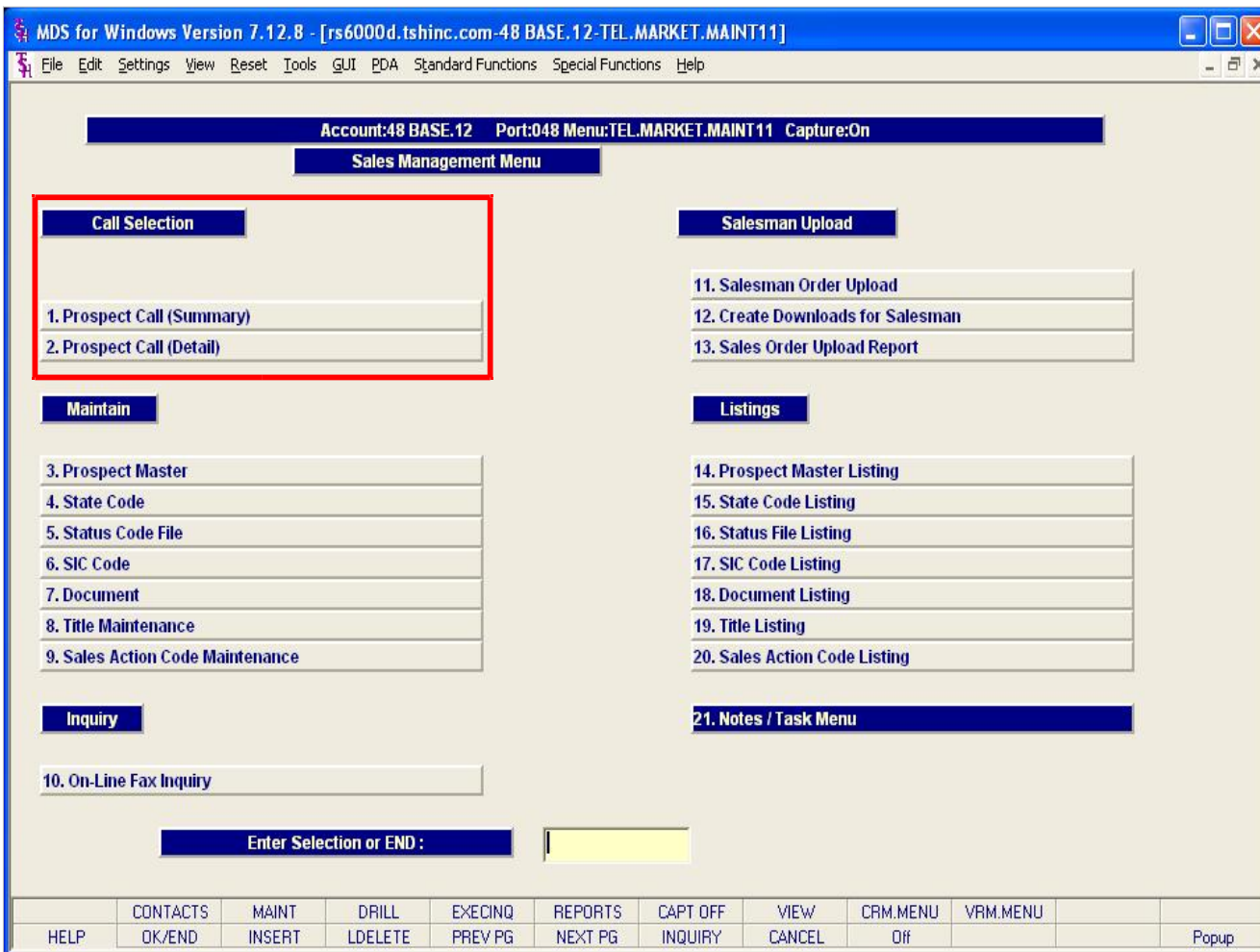
Call Selections

Call selections provide the prospect call summary inquiry and drill down as well as the prospect call (detail) entry screen. Prospect master maintenances must be completed before utilizing the call selections.

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Prospect Call (Summary)

The Prospect call summary is an interactive inquiry. An overview of prospect results can be displayed and a user may choose to drill down to the prospect call detail from the inquiry.

The system maintains and updated "prospect list" by sales rep, and identifies which prospects to contact and in what sequence. The selected prospects are displayed in the requested sequence, in summary mode. The operator can then drill down, by clicking on the prospect number, to obtain detailed information.

Prospect Sls – Enter the salesman code for this inquiry. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the salesman code.

Prospect# - At the prospect number prompt you can enter the prospect number, enter the beginning prospect number to initiate the lookup routine, click on the "INQUIRY" icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Prospect Name – Enter the Prospect Name. Use the "ENTER" key to bypass this field criteria.

State Range

1. Enter the starting 2 digit state range. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the state code.

2. Enter the ending 2 digit state range. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the state code.

Use the "ENTER" key to bypass this field criteria.

Prospect Call (Summary)

Zip Code

1. Enter the Starting Zip Code Range.

2. Enter the Ending Zip Code Range.

Use the "ENTER" key to bypass this field criteria.

Phone Number – Enter the prospect phone number. Use the "ENTER" key to bypass this field criteria.

Follow Up Dt

1. Enter the starting follow up date range, or click on the down arrow next to the field to display the calendar

2. Enter the ending follow up date range, or click on the down arrow next to the field to display the calendar

Use the "ENTER" key to bypass this field criteria.

Status - Enter the status, or click on the down arrow next to the field to display a list of valid status codes and their descriptions. Use the "ENTER" key to bypass this field criteria.

Business - Enter the business code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the business code.

Source – Enter the source. Use the "ENTER" key to bypass this field criteria.

Notes – Enter part of a note comment. Use the "ENTER" key to bypass this field criteria.

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Prospect Call (Summary)

After the user has entered the summary criteria that is to be displayed the bottom half of the inquiry screen will populate with results.

The prospect number, name, city, state, status code, follow up date, and follow up time are populated from the Prospect Call Detail record.

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

The user can enter line number to display Prospect Call Detail records

The user may refresh the inquiry to a begin a new inquiry by typing 'S' and pressing <ENTER>.

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

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Prospect Call Summary Function Keys

Pros Look – The Prospect Look up function is available by clicking on the "Pros look" icon or by pressing the 'F1' function key. This function allows the operator to use the Inquiry to look up a prospect.

Res #days – The Reschedule Number of Days function is available by clicking on the "Res #days" icon or pressing the Shift "F2" function key. This function gives the user the ability to modify the search criteria for the current prospect summary by the specified number of days or follow up date.

Search – The Search function is available by clicking on the "Search" icon or pressing the Shift "F3" function key. This function initiates a new prospect call summary look up.

Action – The Action function is available by clicking on the "Action" icon or pressing the Shift "F4" function key. This function gives the user to modify the search criteria for the current prospect summary by the specified "Action" code.

List – The List function is available by clicking on the "List" icon or pressing the Shift "F5" function key. This function gives the operator the ability to bring up a selection of prospects that were saved to a list.

Mds Inq – The MDS Inquiry is available by clicking on the "MDS Inq" icon or pressing the Shift "F7" function key. This function launches the MDS Inquiries menu.

Cust Ord – The Customer Order Inquiry is available by clicking on the "Cust Order" icon or pressing the Shift "F7" function key. This function launches the MDS Customer Order Inquiry.

Cust Hist – The Customer History Inquiry is available by clicking on the "Cust Hist" icon or pressing the Shift "F8" function key. This function launches the MDS Customer Sales History Inquiry.

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Prospect Call Detail

The prospect call detail maintenance allows users to enter specific details related to a prospect master record. This menu option allows the user to enter a valid prospect that has been entered in the prospect call maintenance. Information from the prospect master is displayed in fields 1 through 16.

To the right of the "Prospect#" field a highlighted box labeled "CUSTOMER" is displayed. This identifies the current prospect as an existing customer. The credit limit and credit hold information fields are populated from the Customer Master record. The AR balance field is populated from the Customer Detail record.

Fields from the prospect master maintenance may be maintained from this screen. Click on the appropriate function key or field to make changes.

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Prospect Call Detail

Adding a Note

Clicking the "Add Note" icon or pressing 'F5' function key brings the user to notes section.

The user must enter a valid operator code OR press Enter and the system will populate the operator code for the user that is currently logged in.

Press Enter to access the "Date" field enter a date for the note in the "Date" field or press Enter and the system will enter the current date.

Press Enter to access the "Time" field enter a time for the note in the "Time" field or press Enter and the system will enter the current time.

Press Enter to access the "Cont" field enter a contact name for the note in the "Contact" field or press Enter and the system will enter the name of the current operator that is logged in.

Press Enter to access the the "Notes/Text" field. The user may then enter free form text. The User may then click "OK" to save the Note or "Cancel" to cancel the note.

The user must then choose a valid action that has been entered in the sales action code maintenance.

Press Enter to access the "Comp" field enter the completion date of the action or press Enter and the system will enter the current date.

Press Enter to access the "FollowUp" field enter a follow up date for the prospect.

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MDS for Windows Version 7.12.8 - [rs6000d.tshinc.com-3548 DEMO.12-TEL.MARK.CALL.DET010$1]

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

Sales Management Prospect Call Detail

Prospect#	UMC	"CUSTOMER"	Credit Limit	50,000	Total
1.Comment			Credit Hold	N	Current
2.Name	UNIVERSITY MEDICAL CENTER		A/R Balance	7,681.13	
3.Addr1	ACCOUNTS PAYABLE/TRAVEL		12.Phone#	212-777-1111	Ext
4.Addr2	400 BROADWAY AVE		13.Fax#	212-817-1111	
5.Addr3			14.Source		
6.City	NEW YORK CITY NY Country		15.SIC Code		
7.Zip	10016-1460		16.Contact1	JOHN DOE	
8.Slsm	001 SY FERTIG		Title1		
9.Bus	01 HOSPITALS				
10.E-Mail	sf@tshinc.com		7.Status	CUS CUSTOMER	
11.WebUrl			8.FollowUp	05/22/03 12:00	

19.Next Step

20.	Oper	Date	Time	Notes/Text
1.	SY	05/21/03	22:59	Puchased a new exb-5000 pitched supplies
Contact	Fran Drescher			
Act		Comp		
2.				
Contact				
Act		Comp		

Enter Line Number to Change or '0' to Accept: XXXXXX   PAGE 1 OF 3

Ord Entry	Prev Rec	Next Rec	Cred App	Add Note	Mds Inq	Cust Ord	Cust Hist	Quote	Quote Inq	EMail	Contacts
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup

Prospect Call Detail

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.

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

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Sales Management Prospect Call Detail

Prospect#	UMC	"CUSTOMER"	Credit Limit	50,000	Total

Prospect Call Detail Function Keys

Ord Entry – The Prospect Look up function is available by clicking on the "Pros look" icon or by pressing the Shift 'F1' function key. This function allows the operator to use the inquiry to look up a prospect.

Prev Rec – The Previous Rec function is available by clicking on the "Prev Rec" icon or by pressing the Shift 'F2' function key. This function will display the previous record associated with the current prospect

Next Rec – The Next Rec function is available by clicking on the "Next Rec" icon or by pressing the Shift 'F3' function key. This function will display the next record associated with the current prospect

Cred App – The Cred App function is available by clicking on the "Cred App" icon or by pressing the Shift 'F4' function key. This will launch the credit application print program for the current prospect.

Add Note – The Add Note function is available by clicking on the "Add Note" icon or by pressing the Shift 'F5' function key. This function will give the user the ability to add a new note for the current prospect.

Mds Inq – The MDS Inq function is available by clicking on the "Mds Inq" icon or by pressing the Shift 'F6' function key. This function displays the MDS Inquiries menu.

Cust Ord – The Cust Order Inquiry function is available by clicking on the "Cust Order" icon or by pressing the Shift 'F7' function key. This function brings the user to the MDS Customer Order Inquiry.

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Prospect Call Detail Function Keys

Cust Hist – The Customer History function is available by clicking on the "Cust Hist" icon or pressing the Shift 'F8' function key. This function launches the MDS Customer Sales History Inquiry.

Quote –The Quote function is available by clicking on the "Quote" icon or pressing the Shift 'F9' function key. This function launches the MDS sales quote program.

Quote Inq – The Quote Inquiry is available by clicking on the "Quote Inq" icon or pressing the Shift 'F10' function key. This function launches the MDS customer sales quote Inquiry.

Email – The Email function is available by clicking on the "Email" icon or pressing the Shift 'F11' function key. This function launches with a blank new message.

Contacts – The "Contacts" function is available by clicking on the "Contacnts" icon or pressing the Shift 'F12' function key. The contacts page of the sales management prospect call detail screen is displayed for the current prospect.

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On-Line Fax Inquiry

The online fax Inquiry allows users to fax documents that have been specified in the document maintenance entry.

Prospect – At the prospect number prompt you can enter the prospect number, enter the beginning prospect number to initiate the lookup routine, click on the "INQUIRY" icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Contact - Contact # 1 from the Prospect Master record will be displayed in field 1. You may override the contact information.

Fax# – The Fax Number from the Prospect Master record will be displayed in field 1. You may override the fax information.

Document # - At the Document# prompt you can enter the document number, enter the beginning document number to initiate the lookup routine, click on the "INQUIRY" icon or press the 'F7' function key which opens the pop-up inquiry box to search for the document.

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.

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Listings

The listings will provide a report of each of the maintenances.

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PAGE   1   *************** PROSPECT MASTER FILE LISTING   ********   DATE 11:18:46am 29 Dec 2006

PROSPECT.MAST A.PROSPECT.NO NAME AND ADDRESS......... Contact1:............... PROS.PHONE.NO PROS.SLSM STATUS.DATE STATUS.TIME

000129	000129	LEBNON PEEK SURGICAL 1511 BASSETT AVENUE BRONX NY 10461	ROBERT KING	718-828-6300	900	12/12/95
000378	000378	SHRINK PACKAGING SYSTEMS 15 PROGRESS STREET EDISON NJ 08820	MRS. NANCY K. GIEBER	908-753-2525	960	
000565	000565	FORD MODEL AGENCY 344 EAST 59TH STREET NEW YORK NY 10022	JERRY FORD	212-753-6500	999	01/01/99
000836	000836	GOOD FRIEND ELECTRIC 265 HIGHWAY 37 EAST TOMS RIVER NJ 08753	RICHARD BOLOTSKY	732-349-4100	960	05/05/95
000932	000932	PALESMO SUPPLY COMPANY 369-373 ANDERSON AVENUE FAIRVIEW NJ 07022	JIM MCMORROW	201-387-1141	999	01/01/99
001106	001106	GROSSMAN PAPER & PLASTIC 673 SOUTH 21ST STREET IRVINGTON NJ 07111	MR. ROBERTO NUNEZ	973-371-6500	960	01/01/99
001160	001160	ALLIED OFFICE PRODUCTS 65 ROUTE 17 SOUTH HASBROUCK HEIGH NJ 07604	JERRY BEDRIN	201-393-9100	960	
001161	001161	AGW TRIMSOURCE	WEBB SKEID	212-643-7300	960	

11.00 x 8.50 in

1 of 6

Prospect Master Listing

The Prospect master listing provides a listing of existing prospect master records.

The user may press <RETURN> to process the prospect master listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".

Notes:

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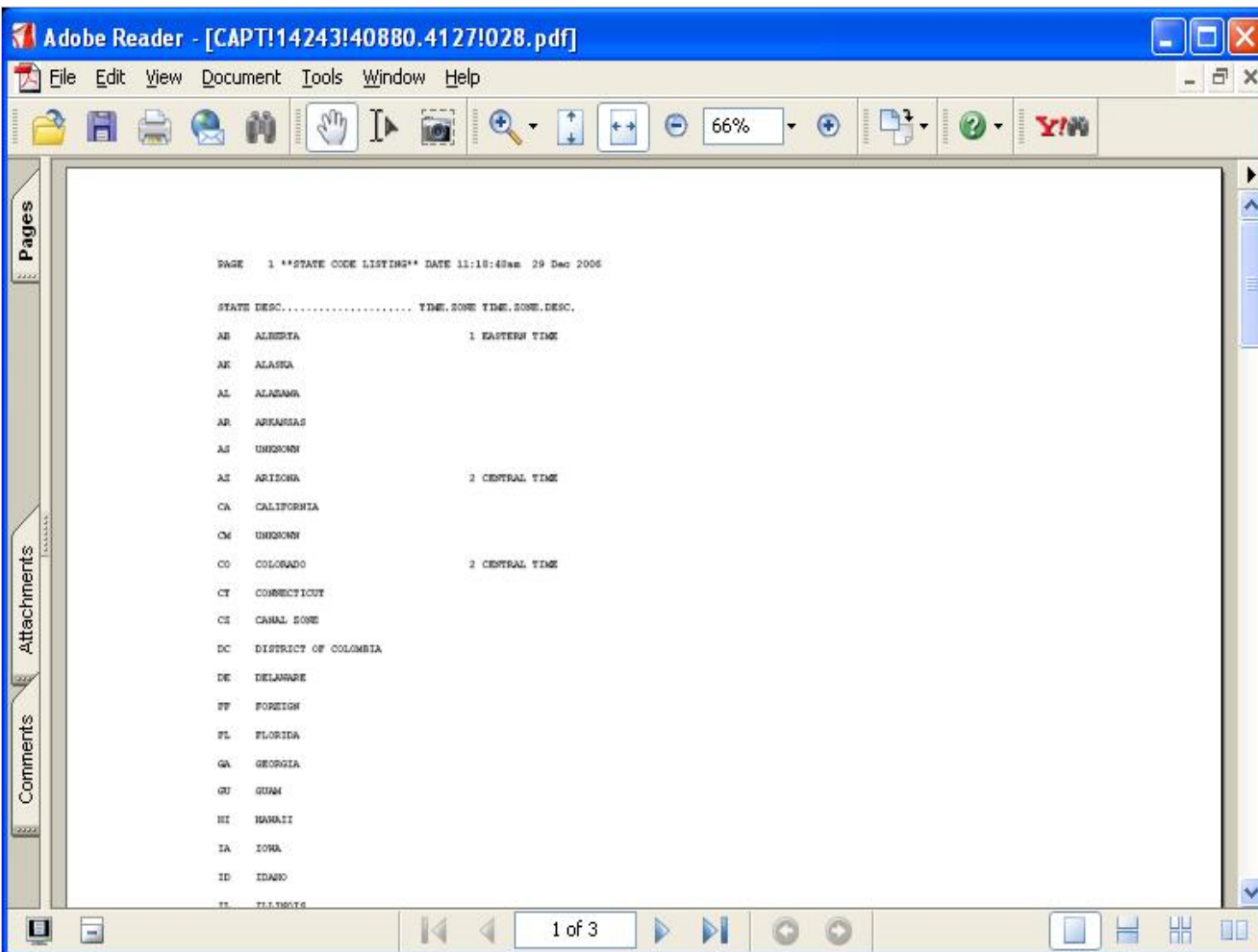
State code Listing

The state code listing provides a listing of existing state codes.

The user may press <RETURN> to process the state code listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".

Adobe Reader - [CAPT!14243!40880.4127!028.pdf]

File   Edit   View   Document   Tools   Window   Help

66%   1 of 3

```
PAGE   1 **STATE CODE LISTING** DATE 11:18:48am  29 Dec 2006

STATE DESC.................... TIME.ZONE TIME.ZONE.DESC.

AB    ALBERTA                    1 EASTERN TIME

AK    ALASKA

AL    ALABAMA

AR    ARKANSAS

AS    UNKNOWN

AZ    ARIZONA                    2 CENTRAL TIME

CA    CALIFORNIA

CM    UNKNOWN

CO    COLORADO                   2 CENTRAL TIME

CT    CONNECTICUT

CZ    CANAL ZONE

DC    DISTRICT OF COLUMBIA

DE    DELAWARE

FF    FOREIGN

FL    FLORIDA

GA    GEORGIA

GU    GUAM

HI    HAWAII

IA    IOWA

ID    IDAHO

IL    ILLINOIS
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Notes:

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Adobe Reader - [CAPT!14243!40920.9601!028.pdf]

File   Edit   View   Document   Tools   Window   Help

```
PAGE    1 **STATUS FILE LISTING** DATE 11:18:51am  29 Dec 2006


STATUS.CODE DESC...............  PURGE.CODE

55          1                    N

ABC         STATUS-DESC-ABC      Y

DEF         STATUS-DESC-DEF      N

GHI         STATUS-DESC-GHI      Y

OPN         ACTIVE PROSPECT      N


5 records listed.
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11.00 x 8.50 in   1 of 1

Sales Management Training Gui

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Status File Listing

The status file listing provides a listing of existing status codes.

The user may press <RETURN> to process the status code file listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".

Notes:

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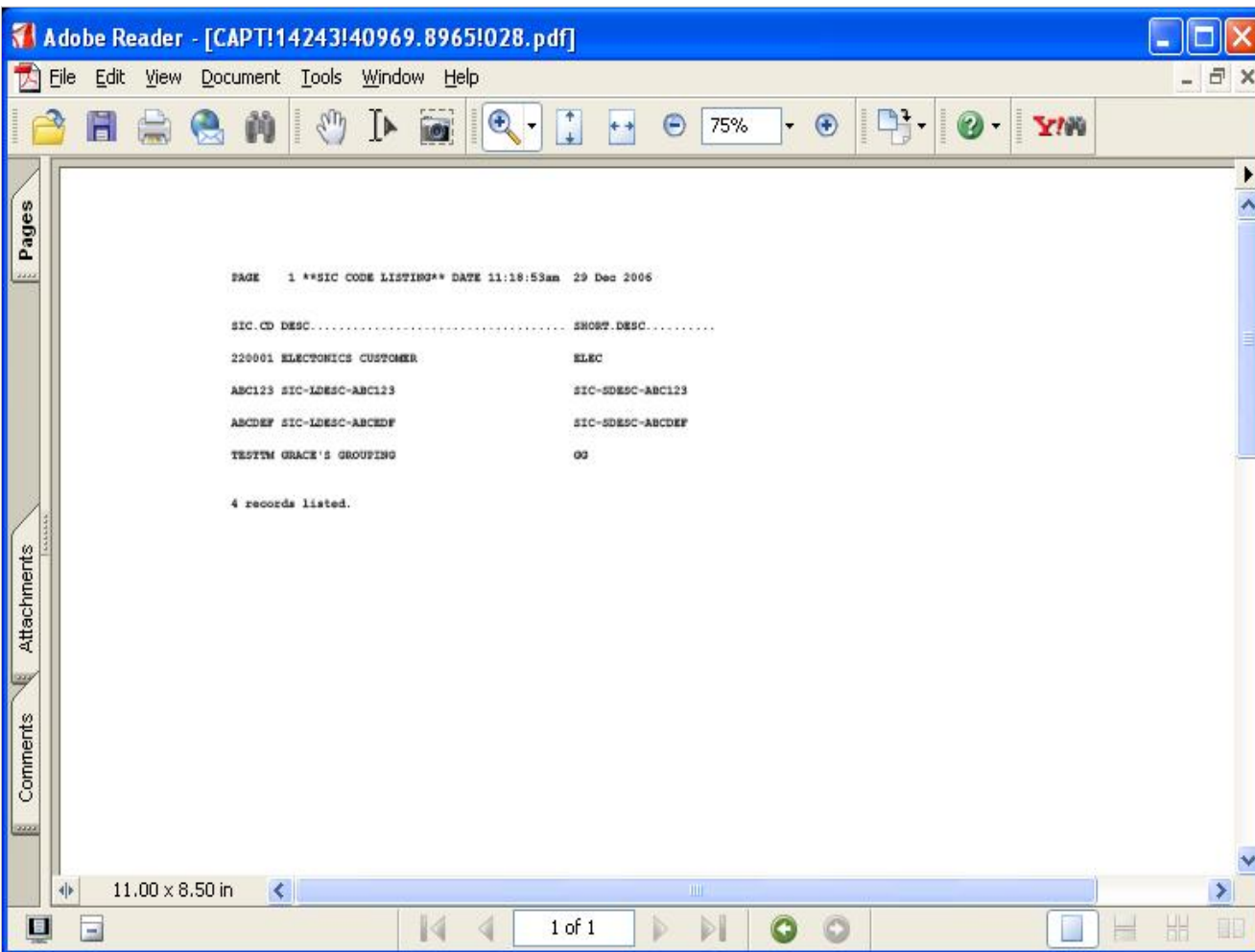
SIC Code Listing

The SIC listing provides a listing of existing standard industry codes.

The user may press <RETURN> to process the SIC code listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".
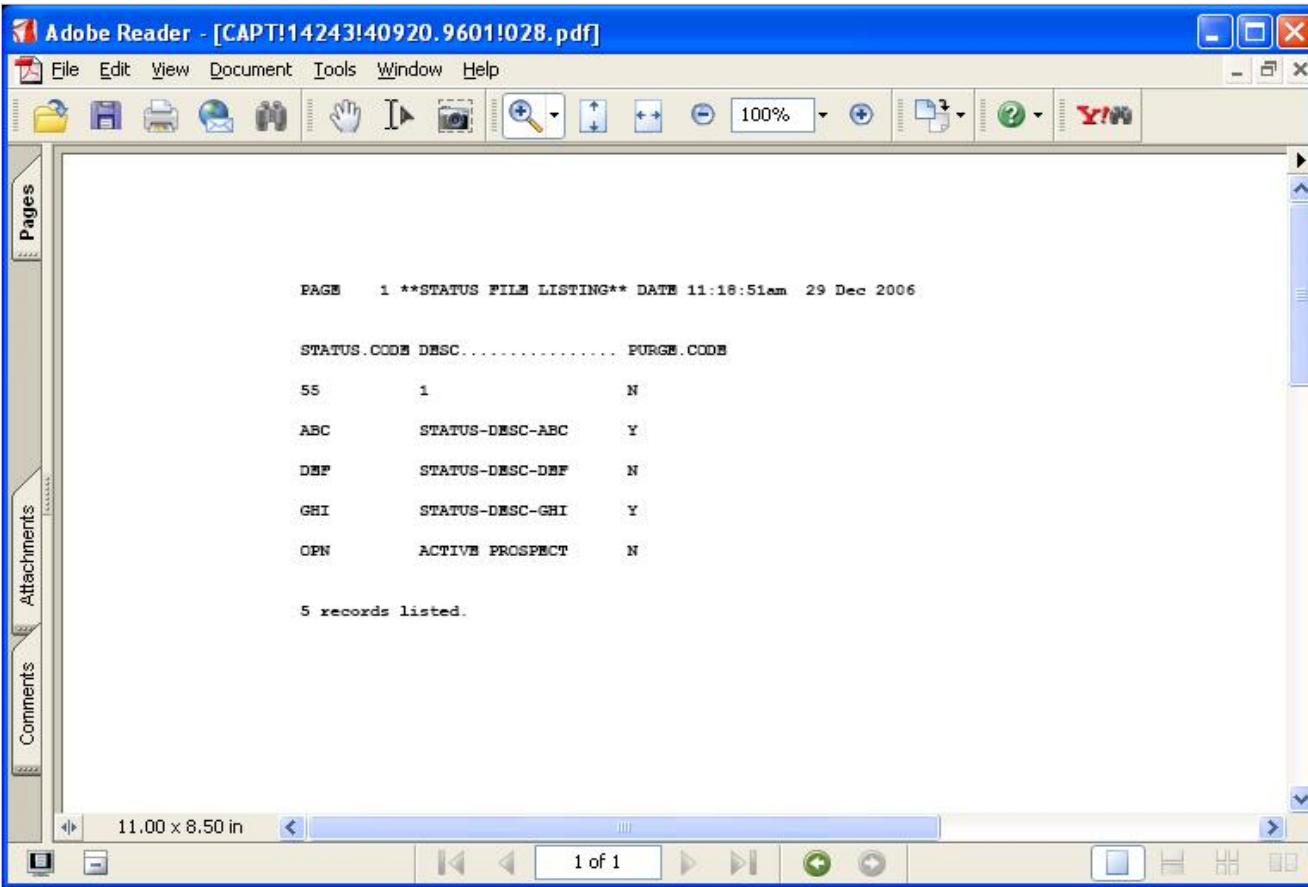
Notes:

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Document Listing

The document listing provides a listing of existing documents.

The user may press <RETURN> to process the document listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".
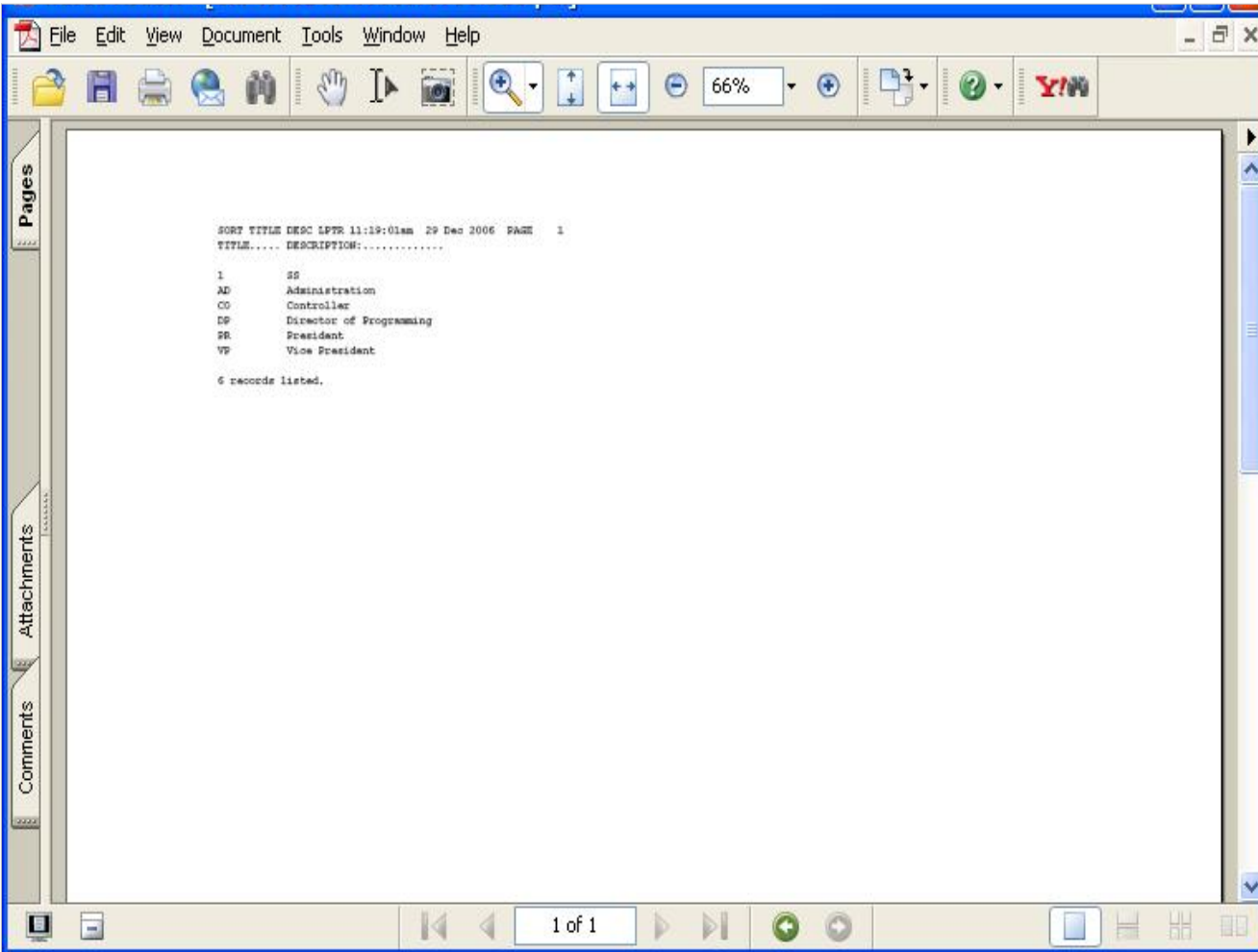
Notes:

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```
SORT TITLE DESC LPTR 11:19:01am  29 Dec 2006  PAGE   1
TITLE..... DESCRIPTION:............

1         SS
AD        Administration
CO        Controller
DP        Director of Programming
PR        President
VP        Vice President

6 records listed.
```

Title Listing

The title listing provides a listing of existing title codes.

The user may press <RETURN>, click the "OK/END" icon or use the 'F2' function key to process the title code listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".

Notes:

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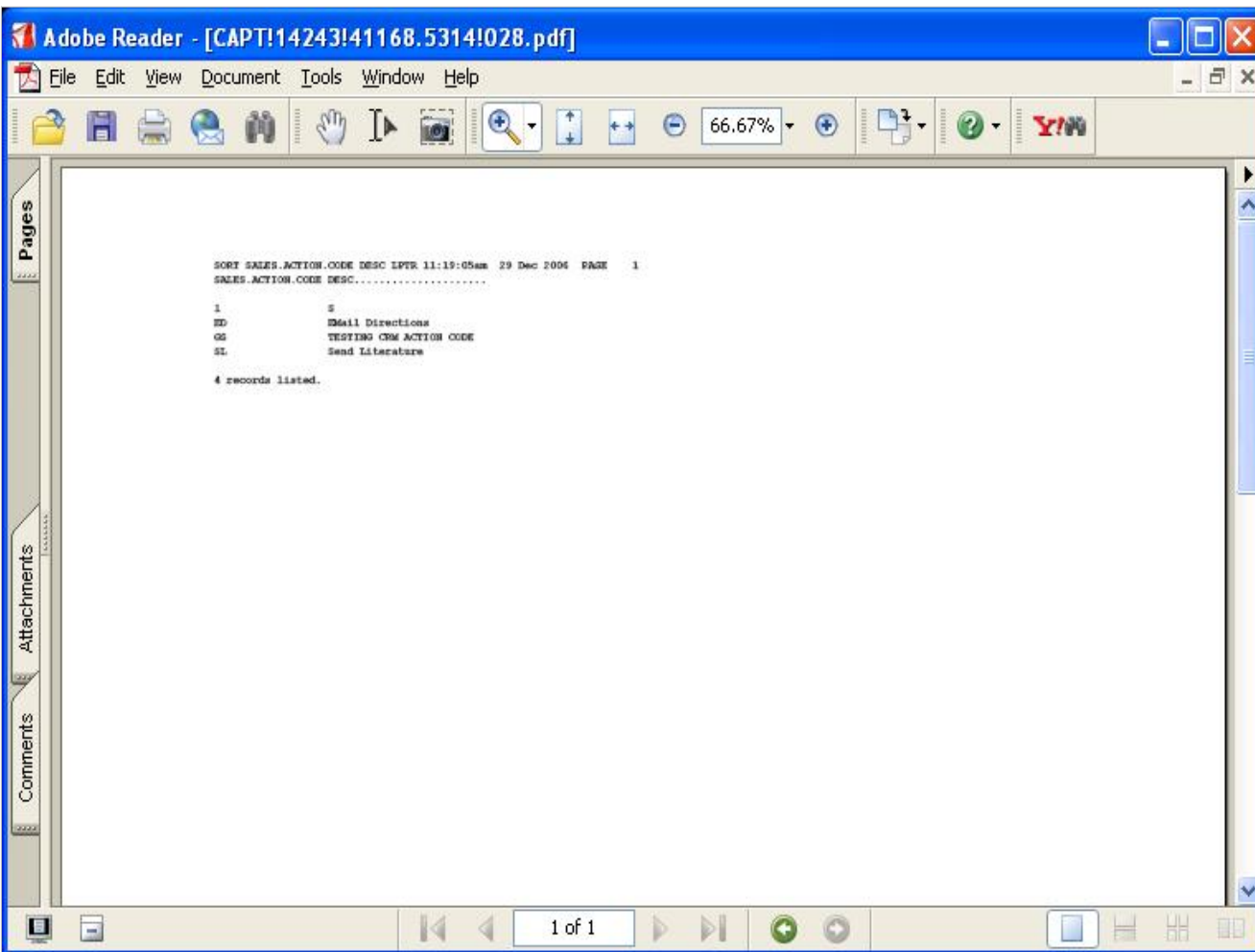
Sales Action Code Listing

The sales action code listing provides a listing of existing sales action codes.

The user may press <RETURN>, click the "OK/END" icon or use the 'F2' function key to process the sales action code listing. Alternatively the user may type "END" and press <RETURN> to be brought back to the sales management menu. The report may then be viewed, printed, faxed or emailed from "MDS Report Capture".

```
SORT SALES.ACTION.CODE DESC LPTR 11:19:05am 29 Dec 2006 PAGE  1
SALES.ACTION.CODE DESC....................

1                    S
ED                   EMail Directions
GS                   TESTING CRM ACTION CODE
SL                   Send Literature

4 records listed.
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Notes:

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Where to get more Information

- Additional training Sessions

- Place a support call using the CRS system: http://crs.tshinc.com

- Call The Systems House, Inc. at 973-777-8050

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Sales Analysis Training Guide

Where to get more information

Please send any comments or questions on this guide to our documentation department at: documents@tshinc.com

Note: This guide was made using WINMDS.

If you still have questions after reviewing this guide, you have several options:

1. Order additional training Sessions- TSH personnel can train you on the specifics of your system.

2. Place a support call using the CRS system: http://crs.tshinc.com – The most efficient way of entering and tracking Support calls. Plus, you will have a written record of the resolution for future reference. If you do not have a login, call TSH today to set on up.

3. Call The Systems House, Inc. at 973-777-8050 – were here to serve you in any way we can.

Notes:

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