



**Overview** – Vendor relationship management involves automating and integrating every aspect of the vendor relationship so that the vendor’s information passes smoothly from individual to individual, and the service rep now dealing with the vendor has at his fingertips all the information required to properly service the account.

Notes:

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documentation - [rs6000d-3824 demo.12-VRM.CALL.SUMM012\$ 1]

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

Vendor Relationship Management Call (Summary)

Vendor Service Rep SY SY FERTIG # in list 9

Ln#	Vendor#	Vendor Name	City	ST	Follow-up Date	Foll Time
1.	ALLIED	ALLIED HEALTHCARE PRO	CHICAGO IL	IL	05/17/05	14:20
2.	ALGER	THE ALGER COMPANY	LOGO VISTA TX	TX	04/07/05	10:15
3.	AIRCAST	AIRCAST INC	NEWARK NJ	NJ	04/08/05	13:00
4.	BANYAN	BANYAN INTERNATIONAL	ABILENE TX	TX	04/08/05	12:00
5.	ROSS	ROSS PRODUCTS INC.	BELLEVILLE KS	KS	04/08/05	14:00
6.	WELCH	WELCH ALLYN	CHICAGO IL	IL	04/08/05	15:00
7.	INVACARE	INVACARE	CHICAGO IL	IL	04/14/05	12:00
8.	DJORTHO	DJ ORTHOPEDICS LLC	CHICAGO IL	IL	04/15/05	11:00
9.	SEMPERM	SEMPERMED USA INC	BRIDGETON NJ	NJ	04/29/05	13:00
10.						
11.						
12.						
13.						
14.						
15.						
16.						

Enter Line# for Detail Screen or END: XXXXXX

Vend Look	Res #days	Mds Inq	Vend Po	AP Inq	Maint				
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL		Popup

## VRM Call Summary

The system maintains and updated “call list” by service rep, and identifies which vendors to contact and in what sequence. The selected vendors are displayed in the requested sequence, in summary mode. The operator can then drill down, by clicking on the vendor number, to obtain detailed information.

**Vendor Service Rep** – The operator code entered. The vendor master file records that have the corresponding vendor service rep, with prior notes, are selected.

The functions located at the bottom of the menu provides with a quick access to other features on the system.

Notes:

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documentation - [rs6000d-3824 demo.12-VRM.CALL.SUMM012\$ 1]

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

Vendor Relationship Management Call (Summary)

Vendor Service Rep SY SY FERTIG # in list 9

Ln#	Vendor#	Vendor Name	City	ST	Follow-up Date	Foll Time
1.	ALLIED	ALLIED HEALTHCARE PRO	CHICAGO IL	IL	05/17/05	14:20
2.	ALGER	THE ALGER COMPANY	LOGO VISTA TX	TX	04/07/05	10:15
3.	AIRCAST	AIRCAST INC	NEWARK NJ	NJ	04/08/05	13:00
4.	BANYAN	BANYAN INTERNATIONAL	ABILENE TX	TX	04/08/05	12:00
5.	ROSS	ROSS PRODUCTS INC.	BELLEVILLE KS	KS	04/08/05	14:00
6.	WELCH	WELCH ALLYN	CHICAGO IL	IL	04/08/05	15:00
7.	INVACARE	INVACARE	CHICAGO IL	IL	04/14/05	12:00
8.	DJORTHO	DJ ORTHOPEDICS LLC	CHICAGO IL	IL	04/15/05	11:00
9.	SEMPERM	SEMPERMED USA INC	BRIDGETON NJ	NJ	04/29/05	13:00
10.						
11.						
12.						
13.						
14.						
15.						
16.						

Enter Line# for Detail Screen or END: XXXXXX

Vend Look	Res #days	Mds Inq	Vend Po	AP Inq	Maint				
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL		Popup

**VRM Call Summary – Function Keys**

**VendLook** – To initiate the Vendor Lookup, MDS gives you the option to use a function to access the feature.

**Res #days** – To reset the number of days for the follow-up date, click on the button labeled, “Res #days”.

**Mds Inq** – To access the full MDS Inquiries, click on the button labeled, “Mds Inq”.

**Vend Po** – To access the Vendor Open Purchase Orders Inquiry, click on the button labeled, “Vend Po”.

**AP Inq** – To access the Vendor Open Payables Inquiry, click on the button labeled, “AP Inq”.

**Maint** – To access the File Maintenance Menu, click on the button labeled, “Maint”.

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documentation - [rs6000d-demo.12-VRM.CALL.DET012\$1]

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

Vendor	Relationship	Management	Call	(Detail)	# in list
Vendor#	BANYAN				9
Vend Cust#		Terms	NET 28 DAYS	A/P Balance	0.00
Name	BANYAN INTERNATIONAL CORP		1.Contact	MIKE	
Address1	PO BOX 1779		2.Phone#	800-224-5544	Ext 545
Address2			3.PO Contact	STEVE	
City	ABILENE TX	TX 79604	4.PO Phone#	800-224-5544	Ext 658
Country	U.S.A.		5.E-Mail	MIKE@BANYAN.COM	
			6.Fax#	800-224-6302	
			7.Follow Up	04/08/05	
8.Comments					
9.Ln	OperRef	Date	Time	Notes/Text	
1.	SY	03/31/05	10:51	Spoke to Mike regarding changing of pay	
	MIKE				
2.					

April 2005

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Prev Rec Next Rec Add Note MDS Inq Vend PO AP Inq Maint  
 HELP OK/END INSERT LDELETE PREV PG NEXT PG INQUIRY CANCEL Popup

## Vendor Relationship Management Call Detail

When a vendor is selected, the selected Vendor record is displayed. This is the process where individual calls, or notes, are recorded.

The operator can update the record by making changes to any of the numbered line items. For example, they can change the contact name by clicking on the contact name field and typing over it.

They operator can also update the Follow Up date by clicking on the field, then clicking on the drop down arrow to display the calendar, then clicking on the correct date.

Notes:

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documentation - [rs6000d-demo.12-VRM.CALL.DET012\$1]

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

Vendor	Relationship	Management	Call	(Detail)	# in list
Vendor#	BANYAN				9
Vend Cust#		Terms	NET 28 DAYS	A/P Balance	0.00
Name	BANYAN INTERNATIONAL CORP		1.Contact	MIKE	
Address1	PO BOX 1779		2.Phone#	800-224-5544	Ext 545
Address2			3.PO Contact	STEVE	
City	ABILENE TX	TX 79604	4.PO Phone#	800-224-5544	Ext 658
Country	U.S.A.		5.E-Mail	MIKE@BANYAN.COM	
			6.Fax#	800-224-6302	
			7.Follow Up	04/08/05	12:00
8.Comments					
9.Ln	OperRef	Date	Time	Notes/Text	
1.	SY	03/31/05	10:51	Spoke to Mike regarding changing of payment terms.	
	MIKE				
				N	
2.					

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

↓

HELP	Prev Rec	Next Rec	Add Note	MDS Inq	Vend PO	AP Inq	Maint				Popup
	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL				

## Vendor Relationship Management Call Detail

To add a new note, you can simply click on the button labeled "Add Note". See arrow on page.

Notes:

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documentation - [rs6000d-3628 demo.12-VRM.CALL.DET012\$1]

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

Vendor	Relationship	Management	Call	(Detail)	# in list
Vendor#	BANYAN				9
Vend Cust#		Terms	NET 28 DAYS	A/P Balance	0.00
Name	BANYAN INTERNATIONAL CORP		1.Contact	MIKE	
Address1	PO BOX 1779		2.Phone#	800-224-5544	Ext 545
Address2			3.PO Contact	STEVE	
City	ABILENE TX	TX 79604	4.PO Phone#	800-224-5544	Ext 658
Country	U.S.A.		5.E-Mail	MIKE@BANYAN.COM	
			6.Fax#	800-224-6302	
			7.Follow Up	04/08/05	12:00

8.Comments

9.Ln	OperRef	Date	Time	Notes/Text
1.	XXX			
2.	SY	03/31/05	10:51	Spoke to Mike regarding changing of payment terms.

Topic	PO/Inv#	Ret

Prev Rec	Next Rec	Add Note	MDS Inq	Vend PO	AP Inq	Maint			
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL		Popup

## Vendor Relationship Management Call Detail

**OperRef** – Enter the operator initials, if different than your own. You can hit <ENTER> to select your own operator initials.

**Date** – Enter date of note or hit <ENTER> to use the system date.

**Time** – Enter the time, in military format, or hit <ENTER> to use the system time.

**Contact** – Enter the contact name.

**Notes/Text** – Enter the actual note. You may use word processing features to cut/copy/paste information into this field, if you wish.

**Topic** - Enter a value that can be used to categorize this set of comments. This value can then be used at a later time to view all comments related to a specific topic.

**PO/Inv#** - Enter a Valid PO Transaction/Invoice Number – if applicable.

**Ret** – Enter retain code, “Y” or “N”.

When completed, the system will forward the operator to the bottom of the screen, with the prompt:

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

Enter “0” to save the changes.

Notes:

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documentation - [rs6000d-3628 demo.12-VRM.CALL.DET012\$1]

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

Vendor	Relationship	Management	Call	(Detail)	# in list
Vendor#	BANYAN				9
Vend Cust#		Terms	NET 28 DAYS	A/P Balance	0.00
Name	BANYAN INTERNATIONAL CORP		1.Contact	MIKE	
Address1	PO BOX 1779		2.Phone#	800-224-5544	Ext 545
Address2			3.PO Contact	STEVE	
City	ABILENE TX	TX 79604	4.PO Phone#	800-224-5544	Ext 658
Country	U.S.A.		5.E-Mail	MIKE@BANYAN.COM	
			6.Fax#	800-224-6302	
			7.Follow Up	04/08/05	12:00
8.Comments					
9.Ln	OperRef	Date	Time	Notes/Text	
1.	SY	03/31/05	10:51	Spoke to Mike regarding changing of payment terms.	
	MIKE				
2.					
Enter Line Number to Change or '0' to Accept:				XXXXXX	

HELP	Prev Rec OK/END	Next Rec INSERT	Add Note LDELETE	MDS Inq PREV PG	Vend PO NEXT PG	AP Inq INQUIRY	Maint CANCEL				Popup
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### VRM Call Detail – Function Keys

**Prev Rec** – To view the previous vendor in the summary list, click on the button labeled, “Prev Rec”.

**Next Rec** – To view the next vendor in the summary list, click on the button labeled, “Next Rec”.

**Add Note** – To add a new note, click on the button labeled, “Add Note”.

**MDS Inq** - To access the full MDS Inquiries, click on the button labeled, “MDS Inq”.

**Vend PO** - To access the Vendor Open Purchase Orders Inquiry, click on the button labeled, “Vend Po”.

**AP Inq** – To access the Vendor Open Payables Inquiry, click on the button labeled, “AP Inq”.

**Maint** – To access the File Maintenance Menu, click on the button labeled, “Maint”.

Notes:

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DATE: 20 Apr 2005		VENDOR RELATIONSHIP REPORT					PAGE: 1
VENDOR#	VENDOR NAME	LINE	ENTRY DATE	FOLLOW UP DATE	INIT CONTACT	----- MESSAGE -----	EBT
ABCO	ABCO DEALERS INC	1	04/02/04	04/21/05	DF Barney	Called to check new pricing on latest product	N
AIRCAS	AIRCAS INC	1	03/31/05	04/30/05	DF MARK	Spoke to Mark about receiving special quant	N
ALGER	THE ALGER COMPANY	1	03/31/05	04/25/04	SF MINDY	Spoke with Mindy on status of special orders	N
ALLIED	ALLIED HEALTHCARE PROD	1	03/31/05	05/17/05	SF JOEL	CONVERSATION REGARDING PAYMENT TERMS	N
BANYAN	BANYAN INTERNATIONAL CORP	1	03/31/05	05/01/05	SF MIKE	Spoke to Mike regarding changing of payment t	N
DJOETHO	DJ ORTHOPEDICS LLC	1	03/31/05	04/25/05	SF ROY	Conversation regarding contract pricing.	N
INVACARE	INVACARE	1	03/31/05	04/25/05	SF FRED	Conversation regarding special pricing.	N
HBM	JH COMPANY	1	04/20/05		DF John	Conversation re-pricing contracts 2006	N
ROSS	ROSS PRODUCTS INC.	1	03/31/05	04/27/05	SF DAVID	Spoke with David regarding special pricing.	N
SIMPERM	SIMPERMED USA INC	1	03/31/05	04/29/05	SF TOM	Spoke with Tom regarding special pricing.	N
WELCH	WELCH ALLYN	1	03/31/05	04/29/05	SF JOHN	Spoke to John regarding setting up contract p	N

### Vendor Relationship Report by Vendor

This report prints a vendor relationship report, sorted by vendor, for the information selected below.

#### Report Generator Prompts:

**Vendor#** - Select ALL Vendors, enter a range of vendor numbers, enter the specific vendor number.

**Oper Initials** – Select ALL Operator Initials, enter a range of operator initials, or enter a specific operator initial.

**Follow Up Date** – Select ALL follow up dates, enter a range of follow up dates, or enter a specific follow up date.

Press <RETURN> to Process Report, Line# to Change, or Abort:  
 Press <ENTER> to process the report.  
 Click "CANCEL" to abort the running of the report.

Notes:

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## Vendor Relationship Report by Follow Up Date

This report prints a vendor relationship report, sorted by follow up date, for the information selected below.

### Report Generator Prompts:

**Follow Up Date** – Select ALL follow up dates, enter a range of follow up dates, or enter a specific follow up date.

**Vendor Serv Rep** – Select ALL vendor service reps, enter a range of vendor service rep codes, or enter a specific vendor service rep code.

**Vendor#** - Select ALL Vendors, enter a range of vendor numbers, or enter the specific vendor number.

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

Press <ENTER> to process the report. Click "CANCEL" to abort the running of the report.

```

DATE: 20 Apr 2005          FOLLOW UP REPORT          PAGE: 1
ALL FOLLOW UP DATES

VENDOR#  VENDOR NAME      CONTACT  FOLLOW  INIT CONTACT  LINE  COMMENTS  EBT
      DATE      UP DATE
HBM      3M COMPANY          04/20/05      DF  John          1  Conversation repricing contracts 2006      N
    
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Notes:

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## Vendor Relationship Report by Service Rep

This report prints a vendor relationship report, sorted by service rep, for the information selected below.

```

DATE: 20 Apr 2005          FOLLOW UP REPORT          PAGE: 1
ALL FOLLOW UP DATES

VENDOR#  VENDOR NAME      CONTACT  FOLLOW  LINE  COMMENTS  EST
DATE     UP DATE  INIT CONTACT  -----
ABCO     ABCO DEALERS INC      04/02/04 04/21/05 DF  Barney    1  Called to check new pricing on latest product  N
    
```

### Report Generator Prompts:

**Vendor Serv Rep** – Select ALL vendor service reps, enter a range of vendor service rep codes, or enter a specific vendor service rep code.

**Follow Up Date** – Select ALL follow up dates, enter a range of follow up dates, or enter a specific follow up date.

**Vendor#** - Select ALL Vendors, enter a range of vendor numbers, or enter the specific vendor number.

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

Press <ENTER> to process the report. Click "CANCEL" to abort the running of the report.

Notes:

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documentation - [rs6000d-2756 demo.12-PURGE.VRM.VENDS1]

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

Purge VRM file - Specific Vendor

1. Vendor#      MMM      MMM

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

XXXXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL				Popup
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### Vendor Relationship Purge by Vendor

The Vendor Relationship Purge by Vendor program will purge all VRM records (call notes) for the vendor number selected.

#### Report Generator Prompts:

**Vendor#** - Enter the vendor whose VRM records (call notes) you wish to purge.

**Press <RETURN> to purge, Line# to Change, or Abort:**

Press <ENTER> to purge the records. Click "CANCEL" to abort the purging of the report.

Notes:

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documentation - [rs6000d-2756 demo.12-PURGE.VRM.CONTACT.DATES1]

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

Purge VRM file - By Cutoff Contact Date

1. Enter Cutoff Contact Date

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

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL				Popup
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## Vendor Relationship Purge by Contact Date

The Vendor Relationship Purge by Contact Date program will purge all VRM records (call notes) for the dates less than and equal to the contact date entered.

### Report Generator Prompts:.

**Enter Cutoff Contact Date** - Enter the cutoff date for the VRM records (call notes) deletion. The system will then delete all VRM records (call notes) for the dates less than and equal to the contact date entered.

### Press <RETURN> to purge, Line# to Change, or Abort:

Press <ENTER> to purge the records. Click "CANCEL" to abort the purging of the report.

Notes:

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## Where to Get More Information

To contact support call 973-777-8050 or fax 973-777-3063.

To access the The System's House website the address is: [www.tshinc.com](http://www.tshinc.com)

Notes:

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