

# SFCRM

- 1. Company Background**
- 2. Technology Foundation**
- 3. SFCRM Roadmap**
- 4. SFCRM Design Philosophy**
- 5. SFCRM Features and Functionality**
- 6. Value Propositions**
- 7. Product Comparison**
- 8. Hardware/Software Requirements**

# SFCRM - The Company

SFAFINITY was conceived by a team of experienced marketing and technical individuals with the basic intention to provide affordable business solutions to small and medium enterprises (SME). SME's have traditionally been underserved by business software providers. The feature/functionality set is either inadequate or the total cost of ownership is too high. When existing CRM vendors try and address this market segment, they usually use their high end corporate versions that are too complex for the SME market segment. The current hosted CRM solutions are either too basic or unaffordable when it comes to meeting existing business process requirements. In either of the above two cases, the total cost of ownership (TCO) spirals out of hand leading to CRM project abandons.

With this in mind, SFAFINITY provides a set of affordable products and services that will enable an enterprise to take their unique selling proposition (business processes, methods and methodologies) and provide automation to this USP. The expected goal is a quantum leap in productivity and profitability in a very short period of time.

In order to reduce all barriers to entry for most small to medium enterprises, SFAFINITY provides their software in many business models which will appeal to tiered SME market segments based on their propensity to pay for software services.

- Premise software based on outright purchase
- Hosted CRM solution with single or multi-tenanted solution on a per user per month payment (either by SFAFINITY or Channel partner)
- CRM Appliance with a turnkey solution including O.S, SQL database Server, Web Server and SFCRM app server software
- Hybrid solutions with Premise/Appliance on a subscription basis with management and administration provided as a service.



# SFCRM - The Company

No matter how small a SME customer is, SFAFINITY's core value proposition is to provide an affordable CRM solution that is affordable by all SME customers so that they can definitely enjoy the productivity, cost reduction, revenue and profitability generation in a short period of time.

SFCRM is different from the market offerings - based on a core enabling technology that delivers CRM and is marketed and sold exclusively by authorized Channel partners.

The current competition (MSCRM, Goldmine, SalesLogix, Salesforce.Com, Siebel/Upshot) are all too expensive (based on TCO) and SFAFINITY has based its feature functionality to compete with them on an equal footing with superior technology at a cost that is affordable, generates rapid ROI and reduces TCO.

Features, functionality and business processes and logic can be added to any application - after all, it is only programming. The question is:

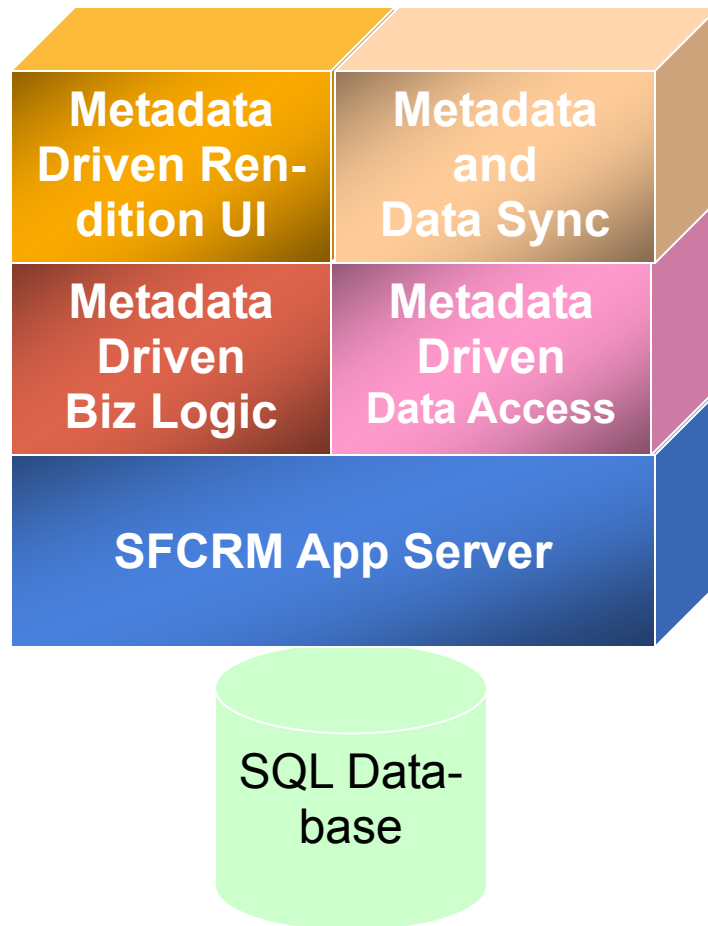
1. How fast can this be done?
2. Can it done by the Channel partners?
3. Does it require complex programming?
4. Can the CRM product provide a broad based set of configuration capabilities that will eliminate such programming?
5. If indeed, customization is required, how easy was it to do?

Would it require knowledge of ASP, Java, C++, VB?

SFAFINITY has built a lot of configuration tools in SFCRM which requires a short learning curve with no programming or scripting. Additionally, no background knowledge of SQL, Java or VB or other scripting languages is required. The net result is the reduction in the cost of customization, rapid ROI and ultimately, a lowered TCO.



SFCRM is based on the SFAFINITY app server. To give a high level overview, the SFAFINITY app server is an independent (server-side) app server built using Java servlets. The SFAFINITY app server accepts XML constructs (usually business logic) and then generates the code to talk to JDBC (SQL databases), XML engines, http servers, Email servers, 3270 - we have even created connectors for Lotus Notes, MS EXchange and Novell Groupwise using the IMAP construct.



The SFCRM app server is driven by what we call *metadata models*, written in XML. These models produce the dynamic data to be served to the user. The app server weaves this data into *rendition templates*. The rendition templates can be HTML/DHTML, which is what we use for web based CRM. They can also be raw XML for WSDL services for example.

Other rendition templates could produce WML, comma-separated or tab-separated data, EDI data, or other custom data formats for Palm/PocketPC/BlackBerry/Linux handhelds.

The SFCRM application architecture is based on a lightweight, pure-Java servlet-based runtime engine. Its design incorporates the best practices in contemporary web application design:

- Clearly-defined 3-tier architecture, with a rigid separation between database, business logic and user-interface layers, providing for reliable, maintainable software
- Transaction control, ensuring data integrity under heavy loads
- Database connection pooling, for providing better performance
- Database-engine-agnostic, SQL92-compliant SQL query generator, relying on standard JDBC 2.0 APIs, ensuring that the application works seamlessly with most common database engines, including Oracle, Microsoft SQL Server, DB2, PostgreSQL, Sybase and Mckoi
- Pure HTML and Javascript in the user interface layer, with no reliance on ActiveX or Java applets, thus requiring a very thin browser-only client
- Use of standard DOM-compliant DHTML and Java-script, ensuring compatibility with most modern browsers, including Internet Explorer, Mozilla, Konqueror and Safari.

These features provide the following additional benefits:

- Complete platform independence, allowing the application code base to run with no change on virtually all hardware and operating systems, ranging from Microsoft Windows 95/98, Linux, and MacOS to high-end Solaris machines and IBM mainframes.
- Complete independence from particular database engines, avoiding vendor lock-in .
- The ability to provide a complete CRM appliance with a turnkey solution involving an Intel/AMD based server with Linux/Windows OS, SQL database and SFCRM software. Additional appliance features include webserver, storage, file and print capabilities in one small foot print server that is scaleable from 5 to 500 users.



*sfafinity*

## Complete CRM Functionality for the SME Market

SFAFINITY's SFCRM has a complete technology roadmap that will serve all aspects of CRM requirements for the SME market segment. Currently, we have completed the SFA, Email Interface and Lead management modules. In the coming months, we will have the rest of the above functionality ready for delivery.

In the next page, we will present the time frame for each of the above modules.



## SFCRM Projected Roadmap

<b>SFCRM Server Platform Module</b>	Shipping now
<b>SFCRM Runtime Engine</b>	Shipping now
<b>Sales Force Automation Module</b>	Shipping now
<b>Lead Management Portal (Lead Distribution for Outside Independent Sales Reps/ Distributors /OEMs/ Channel Partners)</b>	Shipping now
<b>Email Integration— Generic SMTP-POP &amp; IMAP, MS Exchange, Novell GroupWise and Lotus Notes</b>	Shipping now
<b>SFCRM Customization Tools for Channel Partners</b>	Shipping now
<b>Linux OS and SQL 92 Database Integration Kit</b>	Shipping Now
<b>Hosting SFCRM Management Module</b>	Shipping Now
<b>SFCRM Appliance with SFA with Linux/Windows O.S platforms</b>	Shipping Now
<b>Instant Messaging Server and Client</b>	1Q '05
<b>Website Leads/Tickets Integration</b>	Dec 2004
<b>Customer Service Module/Knowledge Management</b>	1Q '05
<b>Mobile CRM</b>	1Q '05
<b>Customer Portal</b>	1Q '05
<b>Email Response Management</b>	1Q '05
<b>Marketing Automation including Campaign Management</b>	1Q '05
<b>E-Commerce/E-Business Integration modules</b>	1Q '05



**SFCRM** has been designed with the SFCRM SDK (Software Development Kit), an advanced web-apps development platform developed indigenously by Dr. M.A. Sridhar. The SFCRM SDK provides a development environment that does not require any knowledge of heuristic programming on the server side (such as C++, C#, Java, VBasic, VBScript, ASP or ASP.Net). With a server JSP Servlet engine, the SFCRM SDK delivers XML based business logic, feature and functionality for the SFCRM server platform. Because the SDK is a RAD (Rapid Development Platform), advanced features and functionality as well as SFCRM customization can be achieved in a fraction of the time it takes with other competing platforms. The SFCRM SDK also allows advanced features and functionality normally found in high end systems (such as Email, Mobile, Back-office EAI) in a system designed up-front for the SME market. The basic design philosophies that were set out when the design specifications of SFCRM was laid out are as follows:

- ✦ The average response time for the app should be 3 seconds or less on all hardware platforms for suggested enterprise loads.
- ✦ The server side footprint should be small (<12MB) in all OS platforms.
- ✦ SFCRM should work on all hardware platforms—Intel/AMD/X-86 single and multi-CPU PC platforms, Apple , Sun Sparc, IBM Risc (mini and mainframe), HP and other RISC platforms.
- ✦ In addition, SFCRM should also work with all Operating System platforms—Windows 2K/2K3, XP, XP-Pro, Linux (all flavors), MAC-OSX and all Unix platforms.
- ✦ All SQL 92 compliant databases are supported including Oracle, MS-SQL 2000, Sybase, DB2, McKoi, PostGres-SQL and more.

# SFCRM Design Philosophy

- ✦ SFCRM should be scalable —users from 5 to 500 can be supported on all hardware platforms, all operating systems and all SQL compliant databases
- ✦ Most of SFCRM configuration should be done from within the SFCRM app itself with a standard browser. Only advanced customization should necessitate the need for the SFCRM SDK.
- ✦ The SFCRM server can be administered/configured/customized remotely via the Internet using a browser.
- ✦ The SFCRM server should automatically recognize any client browser such as Mozilla, IE, Opera, Konqueror, Apple MAC Safari or even PDA based browsers such as J2ME, XML or any other based http based mobile PDA browsers.
- ✦ XML/HTML for advanced integration capabilities such as EAI based back office integration are provided out of the box with SFCRM.
- ✦ Server side PDF creation for advanced document creation for SFA features such as online quotes or contracts generated on the fly.
- ✦ Only application of it's kind that automatically reads data from multiple tables (even in multiple databases), perform business logic and write data back into multiple tables—all in one transaction.



## SFCRM Introduction

**SFCRM** has been designed upfront to serve the needs of the small and medium enterprise market (SME) segment. The SME market's demands for advanced features and functionality are sometimes as complex as their corporate peers as they compete with their heavy weight competitors. CRM is definitely no exception and large enterprises use CRM software to largely reduce customer relationship management. It is no wonder that CRM has been reduced to a science by corporate enterprises enabling them to very effectively reduce competition. SFAFINITY aims to change this inequality by providing the same high end features and functionality to the SME segment, but at an affordable cost of ownership.

SFCRM Sales Force Automation is the first of the CRM products from the SFAFINITY stable of products.

SFCRM has two main components:

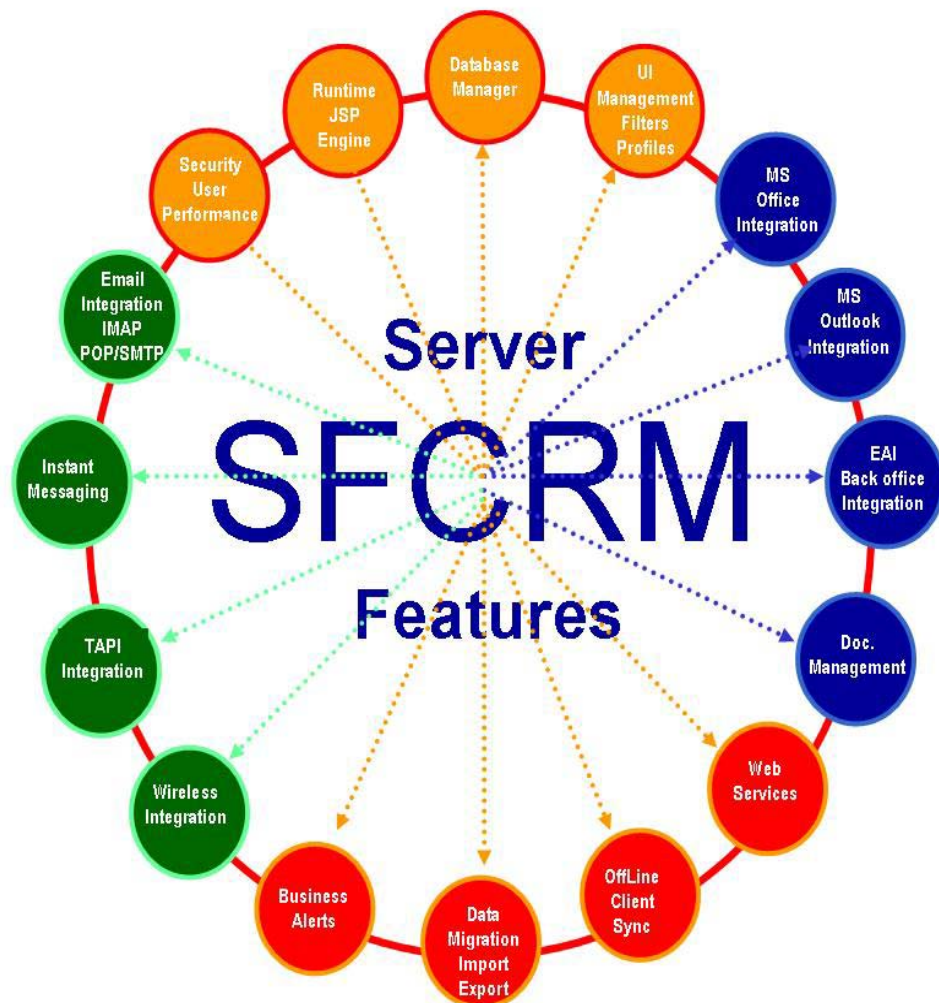
- ☆ Core SFCRM platform that supports common functions such as Email, Back-office, Database, Operating System, Wireless and other business functions
- ☆ Business Functions defined by the core CRM modules such as Sales Force Automation, Customer service and other functional modules.

In the ensuing pages, we will provide detailed information on the above two components of SFCRM.



## SFCRM Core Server Platform

The SFCRM Server platform has extensive features and functionality such as Email, Fax, Voice or Instant messaging communication. Add to this, impressive MS Office integration as well as extensive back office integration capabilities. Of course, the SFCRM core platform is based on a unique patent pending robust Java engine that supports almost all known hardware, operating systems, databases without any extensive software stacks.



## SFCRM Server Platform Highlights

- Core Technology: Fast, Scaleable Runtime Java Engine
- Entity (Table) Management
- Graphical User Interface Configuration
- Document Management
- Hardened Security Management
- Advanced User Management
- Browser Client Side Integration
- MS Word, Excel Integration
- MS Outlook Integration
- IE/Mozilla/Opera/Konqueror Browser Support
- TAPI/Cisco VOIP Integration
- Back Office Integration: EAI Capabilities built in to the SFCRM SDK
- Advanced Data Migration capabilities
- Web Services
- Communication Integration— Extensive Email Server (IMAP, SMTP-POP,
- MS-Exchange, GroupWise, Lotus Notes)
- Private Instant Messaging (Web Chat)
- Online Fax Integration
- Mobile Integration: Online Mobile CRM Services for Palm/PPC/Phone
- Offline Integration to Palm/PPC: Offline laptop Client with Sync



## **SFCRM Business Features and Functionality**

### **1. B2B, B2C & Verticals**

- \* B2B - Business to Business selling: Focus on Account based selling ex. Manufacturing, high tech etc.
- \* B2C - Business to Consumer: Focus on Contact based selling ex. FMCG, Magazine sales etc
- \* B2B - Opportunity focused - Ability to focus on few selling opportunities such as airline sales
- \* Vertical CRM: Highly specialized CRM sales such as insurance, real estate, health, Debt tracking etc

### **Benefits**

- \* Without any customization, SFCRM provides three broad vertical CRM apps
- \* Easy to setup vertical CRM apps by changing table/field labels
- \* Ability to create easy to use UIs for different user roles - for ex - sales rep may be Account focused, but Business Alliance Manager may choose to use Contact focus and CFO may be Opportunity focus

### **Leads Management**

- \* Ability to import contact/account files to the relevant Entities including the linkages
- \* Flag Duplicates by testing combination of Account/Contact name, address, zip code, Tel #, Title, Location, City, State) against existing records
- \* Provide auto allocation of leads based on business rules such as territory and/or product category, opportunity value, company size or other user defined rules



## **Leads Management (Contd.)**

- ✿ Ability to import contact/account files directly to the database
- ✿ Flag Duplicates by testing combination of Account/Contact name, address, zip, tel#, Title, Location, City, State) against existing records
- ✿ Provide auto allocation of leads based on business rules such as territory and/or product category, opportunity value, company size or other user defined rules
- ✿ Provide auto-assignment of leads to inside/outside sales or to authorized distributors, agents etc
- ✿ Track leads based on duration time (user specified) with the sales rep, track activities with assigned leads by sales reps
- ✿ Monitor changes to lead status
- ✿ Provide Email/PDA/Cellphone/SMS notification of sales leads, orders to sales reps and specific users (managers, regional sales controllers etc)

## **Benefits**

- \*\* Ensures that no leads are dropped
- \*\* Improvement of responsiveness to prospect inquiries
- \*\* Standardization of lead qualification best practices
- \*\* Increasing lead conversion rates
- \*\* Building different lead management processes for different groups
- \*\* Optimization of marketing spend
- \*\* Optimization of lead flow from capture to close

## **Opportunity Tracking:**

- ✿ Opportunity Tracking : Centrally track all opportunity-related data, including milestones, decision makers, partners, customer communications, and all other custom information unique to the customer.
- ✿ Sales Methodologies: Built-in support for branded sales methodologies (Miller Heiman), or set up customized sales methodology or sales process.
- ✿ Multiple Sales Processes: Set up different sales processes and page displays for different sales situations, whether it be different business units, different product lines, or different sales channels.
- ✿ Product Tracking: Track product-level information on each sales opportunity, including quantity, standard price, quoted price, and product codes. Additionally, set up revenue and quantity schedules for each product to mirror payment and delivery terms.
- ✿ Competitor Tracking: Track the competition and key competitive issues on each deal. Roll up competitive data in win-loss reports to understand competitive trends and emerging threats.
- ✿ Opportunity Analysis: Easily analyze your sales pipeline so you can quickly identify and eliminate any bottlenecks in the sales cycle or determine the cause of downgraded sales opportunities.

## **Benefits**

- \*\* Forecasting of accurate revenue
- \*\* Identification of trouble spots early in the sales cycle patterns
- \*\* Using of historical trends to better predict future patterns (Analytics)
- \*\* Reduction of administration time and effort



## **Global Forecasting**

- \* Sales Quotas: Definition of sales quotas for each sales rep and territory (bi-weekly, monthly, quarter, Year)
- \* Real-Time Forecasts: Generation of accurate, up-to-the-minute forecasts, giving everyone in the organization a clear, reliable understanding of near-term events so they can focus their resources accordingly.
- \* Forecast Customization and Roll Up: Using any forecasting methodology choose and view sales data by timeline, manager, territory, individual sales rep, and more.
- \* Forecast Audit Trail: Maintain complete forecast history to track critical changes made to forecasts.
- \* Automatic Currency Conversion: Forecasts are automatically and instantly converted into each user's default currency. Managers and corporate executives see forecasts in the default corporate currency irrespective of the currencies of the underlying opportunities.
- \* Forecast Analysis: Measure the accuracy of forecasts by analyzing the deviation between forecast and projected.

## **Benefits**

- \*\* Forecast revenue accurately
- \*\* Identify trouble spots early
- \*\* Use historical trends to better predict future patterns
- \*\* Reduce administration time and effort

## **Territory Management**

- ✿ Sales Territories: Define sales territories with multiple hierarchical levels.
- ✿ Territory Roll Up: Manage the roll up of information across territories based on role hierarchy and your organization's sharing model.
- ✿ Territory-Based Lead Assignment: Set up lead queues and lead assignment rules to automatically route leads to the right sales organization and sales rep based on territories.
- ✿ Territory Re-Assignments: Reassign customers from one sales rep to another when your sales team goes through a reorganization or you hire new reps.
- ✿ Define independent territories in addition to standard territories to provide more in depth analysis of opportunities

## **Benefits**

- \*\* Better insight into sales effectiveness and performance by territory
- \*\* Easy set up of territories assignment
- \*\* Simplification of territory realignments after sales reorganizations
- \*\* Elimination of lag time in lead assignment

## **Workflow Automation**

- ✿ Workflow Rules: Creation of custom workflow rules with triggers based on any business event. As internal processes evolve, workflow rules can be easily modified to keep pace with your changing business needs.
- ✿ Dynamic Task Creation & Assignment: Automatically create activities/tasks when workflow rules are triggered. These tasks/activities are dynamically assigned to the right person based on role.



## **Workflow Automation (Contd.)**

- \* Customizable Task Templates: Pre-defined tasks are created and these are populated with standard data such as priority, status, and due date to make sure follow through is prompt.

## **Benefits**

- \*\* Enforce standard business processes
- \*\* Minimize administrative overhead
- \*\* Lower cycle times and eliminate process delays
- \*\* Improve data quality
- \*\* Help reps work smarter and faster

## **Business Networking**

- \* Linking of Accounts, Contacts, Activities, Emails and Opportunities or other entities including other records within the entity itself.
- \* Tracking of such relationships and presentation in the UI especially Activities and Opportunities
- \* Creation of primary relationship of one entity with respect to the other entities

## **Benefits**

- \* Networking is fast becoming the new mantra for sales. it is estimated that 50% to 60% of new sales are created by business networking and so-called "referrals".
- \*\* Graphical representation of Business Networks will stimulate creative selling and marketing (1Q '05)
- \* Maximizes the intellectual capital of an enterprise by using networking to enhance sales.

## **Business Alerts**

- ✿ Trigger Rules: Creation of custom rules based on standard and custom fields to trigger alerts.
- ✿ Instant, Dynamic Alerts: Alerts are automatically sent in real time to the right individuals based on their roles, ensuring that no business opportunity or issue goes unnoticed.
- ✿ Anytime, Anywhere Delivery: Alerts are delivered via email, including to email-enabled wireless devices such as a Black Berry, Palm/PPC or mobile phone using SMS or J2ME.
- ✿ Alert Templates: Creation of templates that are pre-defined with standard information depending on the business situation and urgency.

## **Benefits**

- \*\* Increase responsiveness to customer needs
- \*\* Ensure no critical issue goes unnoticed
- \*\* Eliminate lag time
- \*\* Increase efficiency

## **Team Collaboration**

- ✿ Sales Teams: Creation of teams for each account or opportunity as well as define default sales teams for individual reps.
- ✿ Team Roles: Identification of roles that each team member plays; e.g., executive sponsor, sales rep, account manager, consultant, etc.
- ✿ Data Security: Assignment of different security levels to different team members depending on the access they require to the account and opportunity data.
- ✿ Participation Summary: Users can quickly get a summary of all accounts or opportunities for which they are a part of the team.

## **Team Collaboration (Contd.)**

### **Benefits**

- \* All stakeholders in Account management are clearly defined
- \* Effective selling to large, complex organizations
- \* Coordination of selling efforts across multiple business units
- \* Customers get a consistent interface determined by the team roles

### **Account Management**

- \* Complete Account and Contact Repository: Provide online, company-wide access to all account data including contact information, customer org charts, relevant documents, partners involved in the account, and more.
- \* Integrated Account History: View all customer history in one place — including marketing campaigns, sales opportunities, customer service cases, and every interaction.
- \* Account Hierarchy: Define parent-child relationships between accounts to depict complex organizations with multiple subsidiaries or divisions.
- \* Team Account Management: Define all the people involved in managing an account along with their respective reference roles
- \* Management: Manage customer reference programs by identifying and managing the accounts that can serve as marketing and sales references.

### **Benefits**

- \* Get an end-to-end, 360-degree customer view
- \* Improve customer satisfaction levels
- \* Increase rep productivity
- \* Establish collaborative customer management



## **Account Management (Contd.)**

### **Benefits**

- \*\* Provide a consistent face to customers
- \*\* Shorten ramp-up time for new reps

### **Activity Management**

- ✿ Activity Tracking and Collaboration: You can track tasks and activities, schedule joint meetings, assign tasks to other users, and set up activity templates for frequently or automatically assigned tasks.
- ✿ Calendaring: Manage appointments and other scheduled activities.
- ✿ Activity History: Maintain a historical record of all activities (complete and pending) related to an account, contact, or opportunity.
- ✿ Link activities to other Accounts, Opportunities, Contacts or Opportunities to enhance business networking

### **Benefits**

- \*\* Increase productivity
- \*\* Improve coordination and collaboration
- \*\* Ensure that critical tasks don't fall through the cracks
- \*\* Keep everyone informed of all account activities
- \*\* Increase customer service levels

### **Literature Management**

- ✿ Central Repository: A one-stop shop for all the most up-to-date sales materials — including marketing collateral, presentations, and more — instantly available online, 24-7.



## **Literature Management (Contd.)**

- ✿ Folders and Search: Documents can be organized into folders for easy reference, and a keyword search capability helps reps find exactly what they're looking for.
- ✿ Attachments: Reps can easily attach documents from the library to messages they send from SFCRM, ensuring that they are always sending customers the most recent versions.
- ✿ Document Security: You can limit access to sensitive documents and folders.

## **Benefits**

- \*\* Ensure everyone is using your most up-to-date materials
- \*\* Eliminate time spent tracking down documents
- \*\* Help sales reps be more responsive to requests for information

## **Email prospecting and Tracking**

- ✿ Email Templates: Set up professional-looking HTML email templates for your sales rep to use in prospecting activities. Email templates can include company branding and graphics for maximum impact.
- ✿ Personalization: Reps can personalize email templates with relevant notes and information before sending to prospects and customers.
- ✿ Mass Email: Reps can send a large number of emails in one shot as part of their own prospecting and pipeline-building activities.
- ✿ Tracking: Track the success of prospecting emails by monitoring key metrics such whether the recipients opened the messages, when they opened them, and more.

## **Email prospecting and Tracking (Contd.)**

- \* Benefits
- \* Improve effectiveness and productivity
- \* Increase the professionalism of your external communications
- \* Refine your messages by monitoring which templates are most successful

## **Opportunity Alerts**

- \* Alert Audience: Select key executives and other stakeholders — including non-SFCRM users — as recipients for big deal alerts.
- \* Alert Triggers: By setting alert triggers, you'll define the opportunity amount and probability percentage that will trigger an alert.
- \* Email Notification: Big deal alerts, with a snapshot of the opportunities are automatically sent via email to your audience when your trigger criteria are met.

## **Benefits**

- \* Publicize key deals
- \* Keep executives in the loop
- \* Ensure your sales reps' efforts are recognized

## **Sales Analytics**

- \* Win-Loss Analysis: Identify the key issues that are costing you sales deals, and stay on top of past and emerging competitive trends.
- \* Pipeline Analysis: Easily perform segmented and rolled-up pipeline analysis for insight to help shape your business and drive it forward.
- \* Reporting and Charting Tools: Easy-to-use wizards help users create and customize reports on the fly as well as add custom-built charts.

## Sales Analytics (Contd.)

### Benefits

- \* Improve sales processes and operations
- \* Get better insight into critical sales metrics and issues
- \* Increase competitiveness

## Mobile Solutions

- \* Offline Client Edition: With Offline Edition management of key customer data using the familiar, easy-to-use interface, but on a disconnected laptop.
- \* Wireless Edition: Wireless Edition allows retrieval and update your critical, real-time customer data from a Web browser or email-enabled handheld wireless device such as a wireless Pocket PC, Palm OS® device, BlackBerry™, or mobile phone.
- \* Mobile Edition without wireless: For handheld devices without wireless connectivity, Mobile Edition powered by Intellisync/ Companion-link allows to access key customer data via Palm OS® device or Pocket PC.

### Benefits

- \* Improved productivity on the road
- \* More accurate and timely data
- \* Real-time visibility into sales pipeline from any location
- \* Improved collaboration and team work
- \* Better communication between sales management, field sales reps, and inside sales
- \* Higher responsiveness to customers

## **MS Office (Word/Excel) Integration**

- ✿ Document Templates: Setup Word or Excel templates for commonly used sales documents so that reps can painlessly create documents populated with data without retyping or copying and pasting.
- ✿ Report Export: Easy export of SFCRM reports into Excel so that data can be added from external sources or simply accessed, saved, or shared in a familiar format.
- ✿ Offline Analysis: Multiple reports are pulled into an Excel workbook for future analysis or when working offline (User should be provided access to this).
- ✿ Mail Merge: Creation of Word mail merge templates that can be populated with information from SFCRM, including product and schedule line items for building quotes.

## **Benefits**

- ✿ Increase productivity and effectiveness
- ✿ Give sales reps the tools they are familiar with
- ✿ Eliminate data entry or copy-and-paste errors

## **MS Outlook Integration**

- ✿ Capture Outlook Emails: From Outlook, add incoming or outgoing Outlook emails to the appropriate record in SFCRM. Flexibility to select the emails ensures that only relevant emails are logged into SFCRM and the system is not cluttered with irrelevant communications.
- ✿ Address Book and Calendar Synchronization: Synchronization of Outlook address book and calendar with SFCRM to keep all contacts and activities up to date in both places.



## MS Outlook Integration (Contd.)

### Benefits

- \* Reduce manual processes and increase productivity
- \* Ensure all critical customer communications are captured
- \* Eliminate email clutter

## Palm/PDA Sync

(via the browser while connected online using the Intelli-sync client)

### Synchronization

- \* Data is entered once — in SFCRM or on the Palm/PDA — and have that information available and up-to-date in both SFCRM and your PDA.
- \* Conflict Resolution
- \* Synchronization helps eliminate duplicates by detecting conflicts in your records and allowing conflict resolution painlessly.

### Benefits

- \* Save time and avoid double entry
- \* Keep information up-to-date in two places at once
- \* Ensure that the most recent information is always readily available.

# SFCRM—Value Propositions



SFCRM is laden with features and functionality designed specifically for the SME market with the following value propositions:

- ✿ Fast instantaneous implementation in all business delivery modes for immediate results
- ✿ Easily maintained without any IT staff
- ✿ Customizable from within the browser to meet unique business goals
- ✿ Scalable to accommodate fast growth
- ✿ Facilitates long-term customer loyalty and satisfaction

**Strong value propositions deliver results:**

Increased revenue, faster time to market, decreased costs, improved operational efficiency, increased market share, decreased employee turnover, improved customer retention levels. Sales increase, leads are generated, retention rates blossom, and people "get" it.

***sfa**finity*

## Hardware and Operating System Platforms :

CPU	Windows	Linux	Unix	Other
Intel	✓	✓	✓	✓
AMD	✓	✓	✓	✓
Apple		✓	✓	Mac OSX
PowerPC		✓	✓	
Sun Sparc	✓	✓	✓	Solaris
IBM Risc		✓	✓	AIX
HP – Risc		✓	✓	HP-UX
Via C3	✓	✓	✓	✓

### Suggested Hardware requirements:

No of Users	Configuration
5 to 10 Users	<ol style="list-style-type: none"> <li>Via C3/Intel/AMD P3/P4 Class CPU, 1.0/1.5 Ghz, 1GB RAM, IDE /SCSI Drives in Raid 1 Configuration</li> <li>Apple G4 Class Server (1.0GHz+), 2 GB RAM, SCSI Drives in Raid 1 Configuration</li> </ol>
11 to 50 Users	<ol style="list-style-type: none"> <li>Intel/AMD P4 Class CPU, 2.4Ghz, 2 GB RAM, IDE /SCSI Drives in Raid 1 or 5 Configuration</li> <li>Apple Xserve Jaguar Server (1.0GHz+), 2GB RAM, SCSI Drives in Raid 1 Configuration</li> </ol>
51 to 100 Users	Intel/AMD P4 Class CPU, 3.4Ghz, 2 GB RAM, IDE /SCSI Drives in Raid 5 Configuration
101 to 250 Users	<b>Quad Intel/AMD Xeon/Opteron Class CPU, 3.0Ghz, 4 GB RAM, IDE /SCSI Drives in Raid 5 Configuration</b>
251+ Users	Sun/IBM/HP High end servers (configurations to be provided on request)