

SFCRM CUSTOMIZATION

1. **Could you outline SFCRM's customization capabilities?**

sfaFinity provides a complete customization interface from the browser eliminating any need to use custom tools.

Here are the key areas of customization:

- a. Page layouts (for all the four views – List, Tabbed List, Detail and Edit Views) can be modified at a very granular level such as tabs, hiding fields in each of the four page layouts. Page layouts can be created based on user profiles (groups).
- b. Custom Data Fields (CDF) can be added to existing tables with a choice of field types (text, pick-list, date, check-box). Data validation/manipulation/calculations can be assigned to CDF including the ability to assign Javascripts to each field.
- c. Picklists for existing system fields can be changed/modified providing for minimal data entry clicks especially for sales/support reps.
- d. Vocabulary administration provides for universal changes to all labels – fields, main entity names, list names, layout names – a unique function that no other CRM provides at a system level.
- e. Filters (segmented views for each entity) can be added for selection from all main views based on individual user groups.
- f. Rules and processes are currently created within the entities itself for specific business conditions. We are planning an Automated Rules Engine and Business Alerts module (due for release in 1Q '05) with an action sequences engine that has enormous customizability to create automated processes. Until then, we will work with the VARs to create rules and processes as well as the alerts required on a case by case basis.

2. **How difficult is it to customize SFCRM?**

Table and field modifications, validations and others customization can be done using the browser customization interface. There is no requirement to learn Java, C++, VBA or even SQL – only basic skills on how to use the browser.

3. **Can SFCRM be extended by adding tables, views, etc.?**

Regarding adding tables, we are providing an extensive set of tables (such as equipments, Invoices, Payments, Deliveries, Cases, Assets, SLAs, Contracts, Quotas etc) to which custom fields can be added. Most customizations can be accomplished by using the existing tables. We will however respect customer's requests for custom tables and ship the application with these custom tables added on a universal basis. The reason is very simple – SFCRM is based on a very careful “normalized” design of the database and we do not want response time to become an issue by improper table with wrong foreign key relationships created. By controlling the ability to create tables at one source, we will eliminate any performance issues due to improper foreign key allocations.

4. **Are scripts such as VBasic, VBScript, .NET, Javascript on the server side or client side required to customize SFCRM?**

With SFCRM, neither programming nor outside scripts is required. Javascript coding may be required if you want to do extra-ordinary customization such as data validation of custom fields.

sfaFinity Inc.

1400 Coleman Avenue Suite F21

Santa Clara, CA 95050.

Tel: 408-654-0400 Email: info@sfafinity.com <http://sfafinity.com>

5. How easy is it to “verticalize” SFCRM i.e. to create standardized versions of SFCRM specific vertical industries such as HVAC, publishing, professional service providers, mortgage lending services, manufacturing and so on?

There are many aspect of verticalization using the Admin functions and we will address them one by one:

- a. Entity (table) names: Can be changed using Vocabulary Edit functions. For example, you can change Accounts to Hospitals, Contacts to Patients, Activities to Appointments, Opportunities to Billing and so on.
- b. Field Names: Labels can be changed very easily using the Admin functions.
- c. Page layouts can be changed for each of the four views – List, Tabbed List, Detail and Edit views.
- d. Filters : Infinite number of filters can be added and provided for selection for an individual user or group. The filters can be multi-entity based such as show all Accounts which are Major Accounts, have an Opportunity > \$100000, in the closing stage and have an Activity scheduled for this week.
- e. Custom Tables: As we are following a highly normalized database design, we are not offering this capability out of the box. But we do offer domain tables embedded in the database that the customer can use with custom fields to create the verticalized CRM app.
- f. The ability to separate the customization from the standard app and offer it as an add-on is now available at database level now. Customization can now be added as simply as changing the database for the standard application.
- g. Activity processes/checklists: Automated activity/tasks can be assigned to Accounts/Opportunities/Contacts so that sales and support staff are clearly aware of what is expected of them. Multiple checklists are supported.
- h. Custom work-flow processes: Until we release our workflow engine (due in 1Q '05), we will be able to create very rapidly, the workflow processes specific to the vertical.

6. Do you plan to release APIs or other customization tools to further help customers to customize SFCRM for their vertical domain...?

- a. There are two aspects of customization that we would like to address:
- b. Verticalization of SFCRM to enable customers to stamp their domain knowledge and capability of providing CRM solutions into the product. To these VARs, our vision is to provide a NO-PROGRAMMING customization such as tables, fields, look ‘n feel, filters, reports and processes.
- c. To the advanced customer/VAR who wishes to provide extensive online back-office integration and improved functionality, we will release XML based APIs.
The SFCRM XML based API toolkit will provide a very flexible environment for the creation of the following:
 - i.) Integration to back-office apps such as Accounting, ERP, Logistics, Manufacturing, e-Commerce for bi-directional data update to/from SFCRM.

sfaFinity Inc.

1400 Coleman Avenue Suite F21

Santa Clara, CA 95050.

Tel: 408-654-0400 Email: info@sfafinity.com <http://sfafinity.com>



- ii.) Custom XML links to provide dashboard functionality within SFCRM such as Financial status of enterprise bank/cash/pipeline/collections data.
- iii.) Integration of e-Commerce/Website apps to SFCRM to populate leads/tickets data directly to Sales/Support reps.
- iv.) Integrated apps outside SFCRM to achieve custom functionality desired by customers at a fraction of the cost as compared to high end portals and integration costs.



MS-OFFICE, EMAIL AND MOBILE INTEGRATION

- 1. What capabilities does SFCRM offer to interact with MS Office? Will it merge selected contacts with MS Word templates, link documents to contacts, accounts, opp's, history, cases.**

Yes. SFCRM is being designed to interact with MSWord for merge single or multiple selected contacts for mass-mailing (1Q '04). Any document (doc, xls, pdf, ppt, etc) can be attached to a record in a selected table. Management of documents is provided by a comprehensive document management system (4Q '04)

- 2. Will it export in Excel format?**

SFCRM has an elaborate reporting tool built-in that provides for creating tabular and matrix reports with columns from multiple tables. Each data item from a column can be based on a set of filter criteria (this is possible only with Siebel On-demand). The reports can be easily exported to XL by clicking an export to XL button.

- 3. Does SFCRM provide email connectors to interact with MS Exchange and Outlook or Lotus Notes?**

Yes. Direct receipt/sending of email to all the email servers (MS-Exchange, Novell Groupwise, Lotus Notes configured for SMTP/IMAP modes). In addition, auto-linkages and copies of in/out emails to Contacts in the Activity table are provided as standard.

- 4. Does SFCRM support IMAP/POP3-SMTP locally or on remote Internet based servers?**

Yes – SFCRM provides support for IMAP/POP3-SMTP email servers located locally or on remote servers. Auto-linking and copies of in/out emails to Contacts in the Activity table are provided as standard.

- 5. Does SFCRM provide desktop Outlook integration?**

We already have direct sync to Outlook client on the user's desktop. This will enable any Outlook user to sync his calendar and address book to SFCRM transparently using the browser. Currently, it is from SFCRM to Outlook – bi-directional sync will be provided in 1Q '05.

- 6. Does SFCRM provide support to Palm/PocketPC/Handheld PDA's both locally and in the wireless modes?**

Yes. The SFCRM server supports both direct (wired via the user's PC) and indirect (using Internet access) handheld access (3Q '04). The SFCRM engine has a browser recognition mechanism and can serve up appropriate content and data based on the type of the wireless device accessing it. Indirect data interchange is provide by using built-in sync tools to transfer data from the SFCRM Server to the handheld using the SFCRM web-client and the user's system.(2Q '05)

- 7. What accounting systems can SFCRM integrate with?**

We can customize SFCRM to read/write data from backend accounting systems to provide selected views to both sales and service reps. Out of the box Quick Books, Great Plains and MAS 90 is being planned for release in 2Q '05 of this year.

sfaFinity Inc.

1400 Coleman Avenue Suite F21

Santa Clara, CA 95050.

Tel: 408-654-0400 Email: info@sfafinity.com <http://sfafinity.com>



8. Can third party reporting tools such as Crystal reports or Visual Studio.Net or others be used to directly provide reports connecting to the SFCRM database?

Yes. Any third party tool such as Crystal reports can access the SFCRM database as it is SQL 92 compliant, open design database with a published schema that the VARs can use to setup custom reports. Out of the box, SFCRM uses McKoi as it ships out of the box for instant deployment without any connectivity required. We also supply connectors to other SQL '92 compliant databases such as MS-SQL Server 200x, IBM DB2, Sybase, PostGres-SQL, Pervasive SQL etc.



SFCRM DATA MANAGEMENT

1. Does SFCRM have limitations and capabilities for importing data into the application?

There are no limitations on data import to the system. Our browser based import tool not only provides for de-duping, but also provides for field level update of selected fields in selected records. All rejected records are provided in an XL format for further analysis, modification and re-import to the SFCRM database.

2. What are the export capabilities provided in SFCRM?

Data export is the easiest as SFCRM provides auto CSV export and, MS Excel import from the SFCRM client or administration client.

3. What tools are provided in SFCRM to interact with the data?

SFCRM browser-based tools provides data migration (import/export) capabilities out of the box including multi-tables maintaining foreign key relationships.

4. Are there import maps built to import data into SFCRM from ACT!, GoldMine, Maximizer, SLX, Salesforce.com, others?

Currently, we are in the process of collecting data formats from these applications. We encourage customers to specify the file format and layouts to us so that we can provide easy custom migration tools from SFCRM itself.

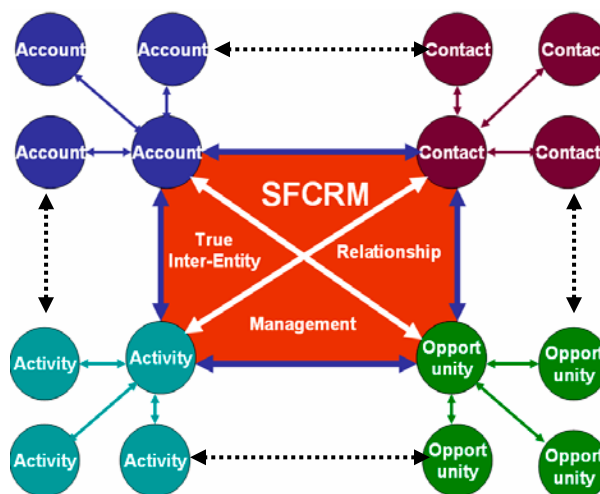
5. Does SFCRM provide CRM database field updates (without SQL programming) such as global replaces, territory realignments, etc.

Yes. Using the browser based data migration tools, global replacements including territory alignments, specific fields such as Account types or product categories can be made.

FUNCTIONALITY/CAPABILITY

1. Is SFCRM an account or contact manager? What do you mean by business networking?

SFCRM is being designed as a true CRM application. Out of the box, SFCRM can be designed as a B2B application (Account Centric) or B2C (Contact Centric) or hybrid applications with user settings defining the mode of operation. We also have true relational design for setting multi-way relationships. Please see enclosed diagram showing the possibilities:



Accounts (Main Entity) are related directly to related Entities such as Contacts, Activities or Opportunities (auto linkages during creation of related entities) or by directly linking with the help of the UI linked buttons. In addition, we have the notion of “primary-ness” of a relationship. For ex – Account has a primary Contact, primary Opportunity and vice versa. This is true of all the major entities and this relationship can be changed at will – for ex – change the Primary Account for a Contact from one Account to another. Also equally important is the relationship type definition – for ex. a Contact can be primary to one Account, Consultant to another and so on. In addition, an Entity can be related to other records in the Entity – for ex. an Account can be linked to another Account – for ex. System integrator, Distributor etc. The same is true for all entities. Even Activity can be linked to other Activities such as Emails, tel calls etc.

Business Networking is a concept that says for an individual to be successful, he should network with his peers – people who are not only customers, but consultants, channel partners, direct and indirect recommenders, opinion leaders and even associated businesses. For ex – if you want to sell small business software, networking with hardware providers will provide you valuable leads that you will spend a fortune in acquisition costs. SFCRM provides the environment for business networking by clearly documenting each contact and it’s many to many relationships with other contacts accounts and leads.

2. Does SFCRM provide marketing campaign management?

Marketing Campaign management is being planned for a Q2 ‘05 release.



3. Is there a customer service module in SFCRM

Yes – a very elaborate customer service is being planned for Feb '05 release.

4. Is there a field service component and dispatching capabilities?

Yes. We are currently working on a comprehensive Workforce management specifications. If as a Channel VAR, you have opportunities with existing customers for Work Force Automation, we have the basic infrastructure – what we need is a live prospect.

5. Will SFCRM provide SLA's, escalation, alarms/invoices when contracts expire?

Yes. We have two modules being planned.
The first is a Customer service module for external customer helpdesk management with SLA, escalation, alarms/invoices when contracts expire in addition to customizable business alerts.(1Q '05 release).
The second is an external workforce management for outside field force automation, support and management.(1Q '05 release)

6. Will SFCRM provide automated pager messaging and integrate via SMTP?

Pager/SMS messaging is already part of the email infrastructure. Based on the Business Alerts module (due in 1Q '05), there will be a setup for each alert that needs to be sent outlining the conditions. The module will also specify which form of alert needs to be sent – SMS or email – at which times of the day and what specific business activity is done or will be done.

7. What is the function of SFCRM's Partner Opportunity Manager (POM)?

The POM is shipping now. Leads assigned to partners, manufacturing reps, agents and out-sourced sales and tele-marketing reps are auto-notified whenever a lead is assigned to them. The email contains all the relevant lead information such as contact name, address, tel#, intent to buy, level of interest, potential value, product category and comments if any. This email can be sent as an email or an SMS or both (depends on the setup). In addition, a URL to access the lead is also enclosed with the email. The lead has a definite assign time for response by the outside sales rep (usually 3 to 5 days or can be setup) during which the time the sales rep has to login and change the status of the lead (from new to qualified for ex) along with an activity entry justifying the change. And the POM does not consume any user seats on SFCRM.

8. Does SFCRM include an outbound e-mail client?

Yes – SFCRM has an internal email web client that can send and receive email.

9. Are there limits on the # of outbound e-mails sent?

No – there are no limits on inbound/outbound emails.

10. Does SFCRM have an app based inbound e-mail client?

Yes – this is standard with a html mail editor/composer and links to “known” contacts automatically as an activity.

**11. Will SFCRM support HTML email?**

Yes – it will render html email in both inbound and outbound email. There is an in-built html editor which also allows you to cut ‘n’ paste html pages from other html editors such as **FrontPage** or others.

12. Are links from inbound/outbound email to contact, account, opportunity, history, case copied and linked automatically?

As a default, all emails (in/out) are auto-linked and a copy of the email and attachments are copied and setup as an activity to the contact (identified by the email id). By the nature of SFCRM’s design once a Contact is linked, related entities such as Account, Opportunity and Activity are automatically related. To add to the impressive design inherent in SFCRM, the email activity can be edited to link to other contacts, accounts or opportunities.

13. Email blasts with pre-formatted templates - does SFCRM provide this?

Yes (1Q ‘05)– the Contact filter can be used to identify a selected group of Contacts and this will be used to send emails individually to selected contacts. Templates (html with graphics) can also be included in the email blasts.

14. Will SFCRM connect to client mail services such as POP3, Exchange, Groupwise, etc.?

SFCRM connects to MExchange, Novell Groupwise and Lotus Notes (in the IMAP mode) and to generic POP3/SMTP servers.

15. Can you specify SFCRM’s approach to opportunity management?

SFCRM supports opportunities as an entity related to Accounts, Activities and Contacts. Opportunity stages can be defined for each type of opportunity (for ex. Automotive, Chemical, Regular etc).

16. What is SFCRM’s strategy for sales processes?

Currently, we have a opportunity process that creates stages and probabilities of closing depending upon the type of opportunity. We are in the process of creating activity process flows (due for release in 2Q ‘05) for each category of activity such as pre-qualifying, farming, account management, presentations, negotiation etc.

17. How is SFCRM managing sales territories?

SFCRM provides very comprehensive Territory Management. Every Account and Contact record must have a territory associated with it. The database design calls for a hierarchical territory map with multiple territories associated with a single territory and several single territories associated with another territory at a higher level. In addition, we have two definitions of a territory – type and class. Types and classes are used to further define the territory for categorizing the territory. Territories can be geographic, product category, sales rep specific or any arbitrary territory definition.

18. How does SFCRM manage territory re-assignment?

Each territory is associated with an owner (sales rep) or in the case of a sales manager, a set of rolled-up territories. Roll-up territories are used only to support the hierarchical reporting structure and has the option of disabling Accounts, Contacts or Opportunities associated with it. The sales manager or the administrator has to merely re-assign the



territory from sales rep A to sales rep B. Individual accounts or set of accounts can also be similarly assigned.

19. Is there the facility in SFCRM for territory auto-assignment upon record creation?

Yes – as soon as an account is created (with/without an associated lead), an auto-assignment module based on business alerts for auto- assignment of leads based on zip code, city, state, product category or other custom rules can auto-assign the lead.

20. Does SFCRM support field level security?

Currently, field level security does not exist. But we are planning to design specific page-layouts and edit screens to hide specific fields from specific users (due in 2Q '05).

21. Are user groups or teams supported in SFCRM?

Yes - users can be grouped based on work type. For ex – you can have a group called Sales Managers and all of them can be setup with specific filters and reports. Teams can be created for specific Accounts/ Opportunities so that information can be shared by all team members in a collaborative fashion.

22. In user management, can users be cloned?

This is being planned for release in 1Q '05.

22. Does SFCRM support user-definable filters, queries, groups?

Yes – we have comprehensive user-defined filters (public and private) and the ability to create user groups (Filters and queries are the same in our system).

**23. Does SFCRM provide facilities for users to run pre-defined reports?
How about custom report creation**

Yes – we have the concept of public and private reports. In addition, we have canned reports that are custom designed for specific functions such as pipeline reports. There is an extensive report generator (custom to SFCRM without any reliance on Crystal Reports or other third party report writers). Reports can be designed by reporting across all major entities (AAOE).

24. Does SFCRM capture web leads, perform assignment logic and automatically get them into the system and have follow-up scheduled?

Yes – we are in the process of designing an advanced UI at the admin level to achieve the above lead processing (due in 4Q '04 unless there is business need to create this earlier)

25. Business alerts – does SFCRM provide an in-built facility?

Yes – this is in the process of being developed including SMS paging for critical alerts. Please see point # 6 for more details.

26. Does SFCRM provide zip code lookup or address standardization capabilities (certify address, barcode, and Carrier Route)?

While this is not a standard feature, we have the database design to achieve this. Address certification such as zip code against city, state and tel. area code can be provided. This can be implemented if customers can come up with a business case to provide this.



27. Do Not Call List – does SFCRM provide the ability to check this online for tele-sales?

In the Contact table, we have a field for Do No Call, Do not Email selections. However, we do not have an online link to the Do Not Call list – but can be easily provided if required as an option.

28. Can SFCRM support de-dupinge functionality on new record adds?

We do have de-duping in data imports of new records. At this stage, we do not have a de-duping facility while doing data entry. If required, we can provide this.

29. Is there a de-dupe utility for data cleansing?

Yes – we can identify duplicate records by doing a search by Account/ Contact name. These records can be marked for deletion and deleted by the Administrator.

29. Is there a quoting tool? How simple is it to add products to a quote, turn the quote into an opportunity, then into a sale for the accounting system?

This is being planned in 2Q '05.

30. Does SFCRM provide a document management capability for storing information like PDF files, sales ppt presentations, telesales scripts etc?

Yes – there is a library function that allows a user to upload/download documents even from a remote site using the browser. There is also the facility to create folders and subfolders under the main directory of the folders. All folders are stored on the main CRM server. In 1Q '05, we will provide the capability of private/public folders. Please see point # 30 below for more details.

30. Does SFCRM provide functionality for the user store attachments to the contact, account, opportunity, case, etc?

Yes. In addition to storing this to AAOE records, we plan to provide document management of these attachments from the library function. Email attachments management is also being planned as the library/document management function.

31. Is there an SFCRM feature to provide TAPI functionality to interact with a telephone systems/PBX/soft switches/VOIP/Call centers for screen pops or outbound dialing?

The application certainly can – but we need more information on the type of telephone system (digital, soft-switch, VOIP Routers, voice-modem etc). This capability needs to be considered on a case by case basis. We can even consider predictive dialing on a project basis. Please also see Call Logging capability (where you can add activities to contacts such as quick phone calls). We can add TAPI to this if required or XML interfaces to PBXs, CISCO VOIP routers.

32. Are there product tables for use in quoting with current pricing, costs, product availability information?

Yes – we do have a products table. Currently, we can have a product category – but in 1Q '05, we plan to add pricing, part #s, EOQ, and other product/inventory fields for full



fledged quote management. In addition, we can link multiple products to an opportunity so that you can now report of multiple product lines in your forecast reports.

33. Does SFCRM provide rules for lead assignment when new records are entered into the system?

Yes – every lead is auto-assigned to a territory depending upon the territory name. Every territory has a defined owner (sales rep, support rep, tele-marketer etc) and can be assigned based on city, state, zip code, area code, product category, prospect type or other user defined parameter.

34. Does SFCRM provide business networking – for ex - Can contacts be associated with more than one account? Can accounts be associated with one another? Please see point # 1 above

Yes – this is one of the main features of the system where we can have the following:
Accounts, Contacts, Opportunities, Activities => Accounts
Accounts, Contacts, Opportunities, Activities => Contacts
Accounts, Contacts, Opportunities, Activities => Opportunities
Accounts, Contacts, Opportunities =>Activities

35. Does SFCRM provide a good roll-up view of contact details at the account level?

This is a standard function that provides a comprehensive view of all Contacts from the Account level and vice versa. In addition, roll-up views are provided at all entity levels for working in B2B, B2C, B2O or in a pure calendar view for PIM oriented users.

36. Does SFCRM provide quotes based on the product table?

Yes – we can create a quotes form that can be linked and stored as a HTML document.



37. INSTALLATION - PLATFORM – TOPOLOGY

1. What are the various software delivery modes utilized in SFCRM?

SFCRM is available in four modes:

- a. Premise based (outright license sale)
- b. Hosted (multi-tenanted)
- c. Appliance (subscription or outright sale)
- d. Hybrid (premise, but managed remotely)

2. Does sfaFinity provide hosting facilities and is truly secure and power protected?

No – at this stage, all hosting is provided by our Channel VARs.

3. What options do customers have as far as hosting is concerned?

Unlike the other hosted vendors like Salesforce.com, Siebel and others who do not permit direct hosting by VARs, we will provide customers with a choice of hosting options:

- a. Use their own hosting centers in their data centers with SFCRM appliances
- b. Use third party ASP co-location facilities approved by SFAFINITY or SFAFINITY channel VARs with a root server access
- c. Hybrid hosting – provide a sfaFinity appliance to their customer to host in-house using the customer's Internet bandwidth, but provide administration and management from the VAR's office using the built-in tools within the SFCRM appliance.
- d. Use sfaFinity's channel VAR's datacenter all over the US.

5. What are the payment options for customers for in-premise installation?

Yes – SFCRM can be installed in two modes.

- a. Outright license purchase: The client pays a perpetual license fee and owns the right to use the software perpetually opt to pay yearly PAS (Premium Annual Maintenance)
- b. Hybrid “Hosting” solution: The client can pay a monthly subscription fee for the software usage and host SFCRM in it's own premises. Administration, management and support as an SLA management and insurance fee will have to provided by the VAR separately.

SFCRM may be managed remotely from the VAR's office for operations such as installation, backup, customization and administration. Utilities such as Windows, VPN, VNC, GotoMyPC or other remote control software can be used.

7. Can SFCRM be hosted at first and moved to the client's premises or vice-versa at a later period ?

With the open design and directory layout of SFCRM, the above is possible by simply taking a backup and restoring it on the target PC. SFCRM does not involve any registry changes in Windows. Another prime advantage we have in SFCRM is that the host server and target servers can be different hardware and operating systems – for ex – the host can be a Linux based server and the in-house premise server can be Windows or Mac server.

sfaFinity Inc.

1400 Coleman Avenue Suite F21

Santa Clara, CA 95050.

Tel: 408-654-0400 Email: info@sfafinity.com <http://sfafinity.com>



8. Is SFCRM a true web client or does it need citrix or VPN for client side access?

SFCRM uses a browser based true web-client (please see Technology architecture white paper). SFCRM has been designed from ground up as an Internet web application and we do not have any client side dependencies on any server OS platform (Windows, Linux, Mac, Solaris). The end user is via a web browser which is currently IE or Mozilla (Phoenix/FireFox) as well as Konqueror and Apple's Safari browser. Plug-ins are not required to be downloaded and even Java is not required on the user PC. Citrix may be used, but it is not required.

9. What choice of databases does SFCRM integrate with as standard?

SFCRM supports any SQL 92 compliant database – choice of Oracle, MS-SQL Server, DB2, Sybase, Interbase, PostGRES SQL, McKoi and other open source databases. We are also evaluating the newly released IBM's Clearscape for SQL 92 compliance. McKoi is shipped as a standard SQL database in all SFCRM installations and will support database sizes upto a few GB (millions of records in the SME).

10. What technology does SFCRM used on the client side? Does an end user need to install a 32 bit client ?

SFCRM's user access is by using a web based browser. Please see point # 7 above for client side dependencies (none).

11. Does SFCRM plan to have an offline (laptop) client? How complete is it?

SFCRM's offline client is an exact 100% replica of the main system (the administration and other features have been left out) with a true SQL compliant relational database running on the offline client laptop. We are working on the sync interface and are planning for a release in 1Q '05 (unless there is a marketing justification to speed it up).

12. What OS platforms does SFCRM support ? What hardware recommendations are required to host SFCRM?

SFCRM supports Windows (W2K, W2K3, WINNT 4.0), Linux (all popular Linux OS work with SFCRM – but we support Redhat, Mandrake and Nitix as the standard choice), MacOSX, Solaris, Unix (IBM, HP, BSD) as standard.

From a hardware perspective, we have provided the server configuration required in our whitepaper which can be downloaded from our website.

sfafinity Inc.

1400 Coleman Avenue Suite F21

Santa Clara, CA 95050.

Tel: 408-654-0400 Email: info@sfafinity.com <http://sfafinity.com>



SFCRM PRICING

1. What is SFCRM's Software Distribution Model: Beyond Software As A Service

We have five specific distribution models:

- a) Licensed, outright sale for installation on customer premises
- b) Licensed, outright sale for installation on a colo hosted basis or at the VAR's data centre
- c) Hosted subscription, month to month (two months advance required) on either a colo hosting basis, or VAR's datacenter
- d) Subscription basis (10 seats or more with a setup fee shared by VAR and sfaFinity with a six month advance subscription pre-paid) for installation on the customer's premises
- e) Outright appliance sale including licensed software

2. How is SFCRM priced in terms of each of the above models?

We have a pricing schedule for each of the above distribution models. Please request your sfaFinity VAR for the latest price list.

3. Are there any setup fees?

We have a nominal setup fee shared with our VAR partners only on for Subscription or Hosted models of installation

4. Named users?

The system is based on named users only. We provide concurrent access by an additional 25% if the total number of named users are more than 25 .

5. Costs for professional services group to do turnkey implementations?

We will discuss this on a case by case basis.

6. Any hidden costs when a customer would be charged and they didn't expect it?

We have no hidden costs at all. We have a very clear published price list. In the case of a outright licensed purchase, we will charge 20% of the license fee as an Annual support fee which includes free version upgrades.