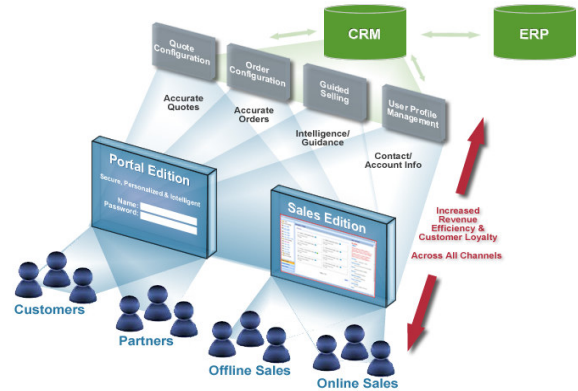


CRM Integrations Feature Datasheet

Let SmartCatalog make even the most complex sales simple. Our selling wizard automates the quote to order process in a web based application, accessible from anywhere via our web portal or within the CRM system used every day. SmartCatalog is user-friendly and can enable your sales team, at all levels, to excel with our personalized and engaging quote and order experience. Our customers worldwide are pleased with their quick and 100% accurate quotes. Anyone who is in manufacturing, technology, telecommunications and services sees huge productivity and profit gains with our tool and it also empowers organizations with top line growth opportunities



KEY FEATURES:

- ✓ **Certified Out of the Box Integration** – Fast installation into any CRM environment.
- ✓ **B2B Portal & Quoting App** – SmartCatalog is a web based selling wizard published to sales people in their CRM application and to dealers/distributors/customers via the internet. Both provide simple to complex quote to order functionality.
- ✓ **Quick Quote** – Empower sales teams using CRM to quickly publish and distribute quotes that automatically create and update opportunities, and close them with sales order conversion.
- ✓ **Paperless Quotes** – Send SmartCatalog quotes through to DocuSign for electronic signature capture and order entry workflow routing.
- ✓ **Guided Selling Wizard** – Profile based question and answer session that guides sales people, customers, partners and prospects to the correct product and/or service catalog and/or configuration.
- ✓ **CPQ (Configure, Price, Quote)** – Product and/or service catalogs are combined with powerful SmartCatalog™ rules engine allowing sales people, partners and customers to configure, price and quote in a catalog and basket error free.
- ✓ **Virtual Catalog Engine** – Automatically reads products and their attributes (such as description, image, SKU number, etc.) from CRM for use in SmartCatalog™
- ✓ **Easy to Use Administrative Console** – Built for and used by Product Managers and Business Professionals. Easy to use GUI administrative interfaces to author and publish Guided Selling paths along with product and pricing rules within minutes

BENEFITS:

- ✓ **Optimize up sell/cross sell** opportunities increasing revenue
- ✓ **Accurately sell** complex products and services
- ✓ **Reduces the complexity** of displaying and allowing for ordering of products/services
- ✓ **Optimize channel** partner performance by proving correct product information, pricing and availability.
- ✓ **Reduce product returns** and discounts due to inaccurate orders
- ✓ **CRM Centric** solution built exclusively for the CRM product; leverage existing CRM environment and extending a quoting wizard out to all sales channels
- ✓ **Increases Revenue and Margins** at the point of sale
- ✓ **Decrease Cost of Doing Business** by getting it right the first time
- ✓ **Improve Customer Satisfaction and Loyalty** when customers expectations are met
- ✓ **Increase Conversion Rates** by publishing Guided Selling to personalize the buying experience and guiding the sales person/partner/customer quickly to what they need and customizing the offering
- ✓ **Easy Administration** allows non-technical staff to update guided selling questions and update rules lowering administration costs
- ✓ **Numerous Technical Benefits** including no new database needed; .net 3.5 application, exclusive use of API's, enterprise class scalability.

2010 KEY ENHANCEMENTS

- ✓ **Deeper CRM Integration** – Advanced quote to order workflow functionality leveraging the CRM API and extending advanced quoting wizards to sales people from within CRM and dealers/distributors/customers via a secure web portal. SmartCatalog is accessible on premise and in the cloud and from any hardware platform including iPads and SmartPhones.
- ✓ **SDK Enhancements** – Additional objects and methods, including cart engine processing of cart level rules and enhanced guided selling engine objects.
- ✓ **Profile Integration** – Evaluate and use profile data from the CRM Account, Contact, or User data.
 - Profile Property Override – Ability to manually set the value of a profile property in the SmartCatalog Administrative Console which will override what is selected by the user that will support data codes and multilingual issues.
 - Multi-Value Profile Properties – When there are multiple answers to a Guided Selling question, the ability to pass to it multiple elements from the profile.
- ✓ **Multiple Language Localization Property** – Support localization of languages stored in another system.
 - Lookup and assign a message id to every element.
 - New Message ID textbox is active in every SmartCatalog entity.
 - Message ID will be tied to various text values in SmartCatalog and will link to MOSS multilingual values or any other multilingual system that may be used.
- ✓ **Saving and Archiving “My Guided Selling”** – Save Guided Selling Questions and Answers with the quote into the CRM database. Saving of assessments is used for retrieval of existing answers during the Guided Selling process as well as for legal archives required by law.
 - Retrieval of configuration data within the user’s profile.
 - “Archive” property added that will be set in the Administrative Console if data should be saved.
- ✓ **Save Guided Selling Responses To Profile:** Property added that is set at runtime by the user to indicate the data must be saved.
- ✓ **Nesting Guided Selling** – The ability to establish Guided Selling Series and Nest an infinite number of Guided Selling paths with an infinite number of nesting levels.
 - Guided Selling Series.
 - Support an infinite number of Guided Selling Trees.
- ✓ **Linking Guided Selling** – The ability to create independent Guided Selling paths and link them to each other. This allows administrators to minimize changes and updates by inserting in one place.
- ✓ **Binding Products to Guided Selling** – Enhanced guided selling by providing the administrator the ability to bind products to answers as recommendations. Once a session is complete, all recommendations can be presented or passed into a scoring system or rule set.
- ✓ **Enhanced Recommendations** – Question and answer session results in recommendation of products, configurations, documents, text or all of the above.
- ✓ **Dynamic Properties Enforced:** Administrative users have the ability to create their own custom properties in use in the Administrative Console via an updated XML schema.
 - Attach property to any entity visible in the SmartCatalog Administrative Console.
 - Exposing own businesses properties in the Administrative Console.
- ✓ **Expanded Web Service Integration Capabilities:** This functionality will allow Administrators to easily pass all data necessary to a service without having to continually update the Data Source.
- ✓ **Advanced Data Migration:** The migration of data from development to staging to production is simplified through a new data migration utility provided in the Administrative Console. Also extensible to allow creation of automated processes for scheduled data migrations.
- ✓ **Advanced Security:** Guided Selling, catalogs and rules are locked down to prevent unauthorized use of elements in the Administrative Console and to ensure that multiple administrative users are not working on the same SmartCatalog or Guided selling tree.
- ✓ **Inline Rules:** Allow individual analysis of conditions against a given product, products in a group, products returned from a query etc, and per product, run set values and actions before the next product is analyzed against a conditional statement. Use of Inline rules can have a dramatic affect on the number of rules to author.
- ✓ **Database Session Persistence:** New SmartCatalog table to store data vs. in process (RAM). Uses vastly smaller amount of memory.
- ✓ **Product Table Queries:** Bind queries to catalogs or categories for dynamic presentation of products
- ✓ **Role Based Security:** Uses Active Directory and can create a SmartCatalog Administrators Group. Apply rights to Active Directory groups in the SmartCatalog Administrator.
- ✓ **Global Field Control:** Lockdown fields to disable certain properties to not allow manipulation of data with SmartCatalog.
- ✓ **Report Generation:** Generate Guided Selling reports that detail all questions, answers, recommendations and rules. Generate Configuration reports that detail each virtual catalog and configuration rule hierarchy and rule contents.

GUIDED SELLING – BEST IN CLASS

- ✓ **Guided Selling Series** – Categorize all Guided Selling Trees under one series.
 - Display Name
 - Description
- ✓ **Guided Selling Tree** – Create new Virtual Catalogs within SmartCatalog or use Virtual Catalogs created in CRM.
 - Display Name
 - Description
 - State (Design, Test, Stage, Production)
 - Effective Date
 - Expiration Date
 - Activate Check Box
 - Archive Check Box
- ✓ **Nesting Guided Selling** – The ability to establish Guided Selling Series and Nest an infinite number of Guided Selling paths with an infinite number of nesting levels.
 - Guided Selling Series
 - Support an infinite number of Guided Selling Trees.
- ✓ **Questions** – Engage the user into a virtual conversation by authoring questions of numerous types.
 - Standard Question
 - Multiple Selection Question
 - String Value Prompt Question
 - Value Prompt Question
 - String Multiple Value Prompt Question
 - Multiple Value Prompt Question
 - Lookup Question
 - Information Target
- ✓ **Question Properties**
 - Question ID
 - Display Name
 - Description
 - Alternate Text
 - Image File Name
 - Status Group
 - Data Source
 - Condition
- ✓ **Conditional Questions** – Implement dynamic question asking by deciding what questions to ask based on current situation.
 - Add/Edit Condition on any question
 - Condition Builder Dialogue
 - Condition Elements include Profile, Global Parameters, external data, and previous Questions.
- ✓ **Web Service Integration** – Call on a web service during the dialogue to retrieve and use data from another system.
 - Lookup Question
 - Data Source Property
 - External Data Source Wizard
- ✓ **Assign Element to Question** – Provide one or multiple results to every question.
 - Answers
 - Set Global Parameter
 - Assign a Profile Property
 - Link to a Virtual Catalog
- ✓ **Answer** – Provide one or many answers to a single question based on the question type.
 - Answer(s)
 - Answer(S) id
 - Answer(S) Name
 - Answer Description
 - Image File Name
 - Exclusionary Answer (if selected, clears all other selections)
- ✓ **Set Global Parameter** – Link a value to a specific parameter that can be used later in the Guided Selling session or in the catalog rule authoring.
 - Select the Global Parameter
 - Assign a value
- ✓ **Assign Profile Property** – Update a Profile Property with an answer provided by the user.
 - Select Profile Property to Update
- ✓ **Multiple Language Localization Property** – Support localization of languages stored in another system.
 - Ability to assign a message id to every element
 - This message id will be tied to various text values in SmartCatalog and will link to MOSS multilingual values or any other multilingual system that may be used.
 - New Message id textbox is active in every SmartCatalog entity.

Guided Selling – Your Virtual Sales Engineer

Amway Global uses Guided Selling to engage online users into a virtual Assessment to then Recommend products and services. While Guided Selling is utilized extensively in B2C eCommerce, it is gaining rapid adoption in B2B Portals and Sales Quoting tools. Guided Selling empowers every sales person with the tribal knowledge they need to quickly and accurately configure, price and quote any product or solution without assistance from anyone.

The screenshots illustrate the user journey through the Amway Global Skin Age Test. The first screenshot shows the initial assessment questions, including 'Your Current Age', 'Sun Exposure', and 'Lifestyle'. The second screenshot shows the continuation of the assessment with questions about stress, sleep, and exercise. The third screenshot shows the final 'Skin Age report' for John Doe, which includes a 'Your Skin Age' of 40 and personalized recommendations for skin care and lifestyle changes.

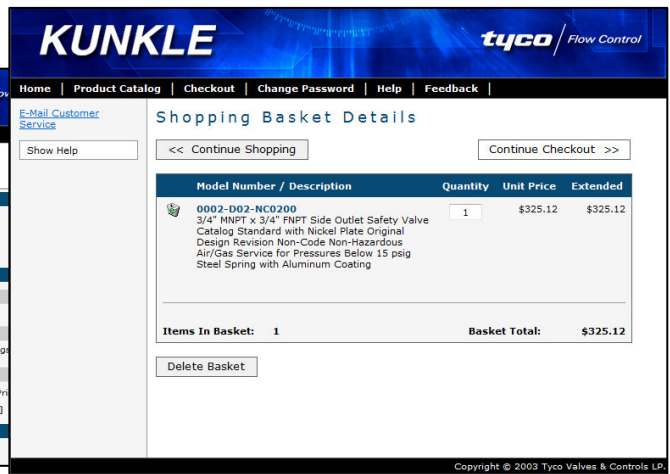
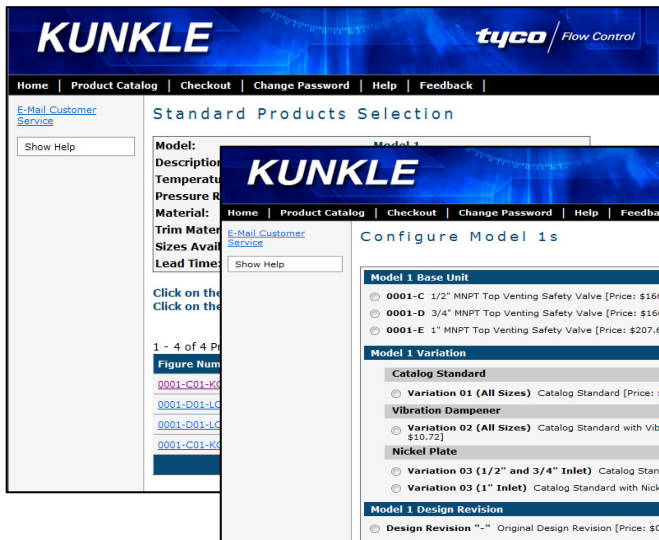
CONFIGURATOR - POWERFUL AND EXTENDABLE

- ✓ **SmartCatalog Catalog Series** – Categorize all Virtual Catalogs under one series.
- ✓ **SmartCatalog Catalogs** – Create new Virtual Catalogs.
 - Catalog ID & Display Name
 - Catalog Layout (Tree View or Step View)
 - Catalog Type (Standard or Query)
 - State (Design, Test, Stage, Production)
 - Active Check Box
 - Effective Date
 - Expiration Date
 - Sort Order
- ✓ **Categories** – Each catalog may have an infinite number of categories assigned to it with an infinite hierarchy.
 - Category ID
 - Category Name
 - Category Description
 - Allow Subcategory Check Box
 - Category Style (Standard, Radio Group, Check Box, Hidden, User Input)
 - Global Query Dialogue
 - Define Content Template Dialogue
- ✓ **Query Catalogs** – The ability to define a query that will run at runtime and present to the user only the products in the CRM catalog that match the query.
- ✓ **External Data Source Catalogs** – The ability to bind a catalog to a web service call and bring in data from an external source to use in a configuration setting and apply rules.
- ✓ **Content Templates** – Establish a series of unique elements that are assigned to a product (s), category or catalog for display use as well as inclusion in rule sets.
- ✓ **Groups** – Very powerful and used in most deployments, the ability to Group products and/or categories together to simplify and minimize rule authoring.
- ✓ **Global Parameters** – Establish virtual elements and set values to them for inclusion in Guided Selling and Rule Sets.
- ✓ **Rule Anatomy.** – All rules within SmartCatalog consist of three elements.
 - Rule Name: Identify the Rule Uniquely.
 - Condition (IF): Establish the condition that the rule will initiate an action on.
 - Action (Then & Else): The result of a condition is that an action occurs on the true side, or the false side, or both.
- ✓ **Rule Types** – There are numerous types of rules that are authored in the Administrative Console. Highlights include:

Mutual Include	Mutual Exclude
Include	Exclude Hide
Recommend	Discourage
Set Default Value	Set a Value/Calculated Value
Set a Minimum Limit	Set a Maximum Limit
- ✓ **Rule Nesting** – Rules may be nested under each other. This means that the condition of the first (parent) rule has to be met and only when then will the second rule condition be evaluated and fired if true. You can write rules on both the true and false side of a condition. This means that if the condition is true, then the nested rule will fire. If you place a nested rule on the false side, it means that if the parent condition is not true, then the nested rule will fire. Most of the time, you will write rules on the true side only but using the false side can be a powerful way to author rules and can decrease the number of rules authored.
- ✓ **Rule Root: Hierarchy of Rules** – All rules are nested under the rules root or what is displayed as “Hierarchy of Rules”. You can open this root rule and write actions against it. Because it is at the root level, no condition is applied. The actions are run every time the catalog is opened.

Tyco – Configure, Price, Quote

Tyco Valves and Controls has utilized SmartCatalog Configurator since 2000, recognizing significant ROI by decreasing administrative overhead and decreasing order errors and product returns by 60%. This has greatly improved operating profit and sales team and customer satisfaction.



RULE ADMINISTRATION - BEST IN CLASS

- ✓ **Administrative Console Description** - The SmartCatalog Rule Manager is the administrative tool that allows Product Managers, Sales Engineers, or even Power Sales Users to create product and pricing rules.
- ✓ **Administrative Console Technology** – The Administrative Console is a .net Windows Form application that is written in Microsoft's C# language on the .net 3.5 platform
- ✓ **CRM Connection** – The Administrative Console connects directly to the CRM product table in order to retrieve product elements and information required to author virtual catalogs and complex product and pricing rule relationships.
- ✓ **Administrative Console UI** – In order to provide an easy, intuitive experience during the rule building process, the Administrative Console utilizes a Tree View drag and drop UI along with simple, easy to use rule builder dialogue.
- ✓ **SmartCatalog Web Service** – Service installed on a web server that has visibility into the application database. It is responsible for providing the connectivity the source database and API. Window authentication is enforced for this web service as well as SSL to ensure security within the application.
- ✓ **CRM Catalog Explorer** – View and use all catalog and virtual catalog data in the CRM Catalog to author Virtual Catalogs for rule authoring.
- ✓ **SmartCatalog Explorer** – Presents a series of modules for Administrators to use for new authoring or editing.
 - Author new Virtual Catalogs series
 - Author new Virtual Catalogs
 - Author new Guided Selling series
 - Author new Guided Selling Trees
 - Author new Global Messaging Series
 - Author new Global Messages
 - Author new Global Parameter Series
 - Author new Global Parameters
 - Author new Product Queries
 - Author new Content Templates
 - Support an infinite number of Guided Selling Trees.
- ✓ **Properties Explorer** – Presentation of all properties available with the current entity in use.
- ✓ **Import Utilities** – Import from other SmartCatalog instances.
 - Import Catalogs and Rules
 - Import Guided Selling
 - Import Products
 - Import SmartCatalog Metadata
- ✓ **Export Utilities**
 - Export Catalogs and Rules
 - Export Guided Selling
 - Export Catalogs and Guided Selling CSV
 - Export SmartCatalog Metadata
- ✓ **Restore Utilities**
 - Restore Catalogs
 - Restore Rules
- ✓ **Catalog Script** – Publish a Catalog Report that details all categories and the organization of products within them.
- ✓ **Rule Script** – Publish a Rule Report that details all configuration rules authored and the order that they will fire.
- ✓ **Rule Testing** – Test all catalog and rules authored within the Administrative Console prior to publishing them to the next stage (Development, Test, Stage, and Production).
- ✓ **Web Control Settings**
 - Environment: The Environment properties allow you to set specific settings for your session of the Administrative Console.
 - Application: Adjust settings to control Application-wide functionality.
 - Web Control Display: This section will control any Web Control settings that affect the display rendered to the user. The Product Catalog Property Settings control what will be displayed in the Web Control as well as what properties will be available for rule creation.
 - Application Access: Assign Virtual Catalogs and Guided Selling Trees to Application Groups.
 - Import SmartCatalog Metadata
- ✓ **License Manager** – Wizard to guide the process of licensing the application using a web service call to the Endeavor production license manager.

SmartCatalog - Administrative Console

The SmartCatalog™ Administrative Console consists of Guided Selling Builder, Catalog Builder and Rule Manager and provides an easy-to-use user interface for creating product catalogs, authoring product/service/bundling/pricing rules and managing guided selling wizards. Business Users who have the product/ market intelligence are empowered to quickly implement and maintain SmartCatalog™ significantly cutting down on the time-to-market and

