

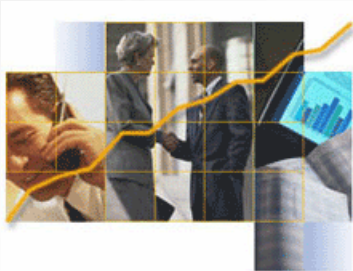
- ◆ Sales Automation
  - ◆ Service Dispatch
  - ◆ Financials
  - ◆ Inventory
  - ◆ Marketing
  - ◆ Workflow Automation
  - ◆ Analytics
- ONE SYSTEM**

## BUSINESS PROCESS COHESION

Open Solutions provides a clear and complete CRM alternative for helping you keep track of not only your customer's life cycle—engage, transact, fulfill, and service, but your whole business. It is about effectively sharing and exchanging information within your organization and with your customers and vendors. Your organization's profitability is driven by customer loyalty and by the efficiencies you build into your business processes. Today, competition is fierce and clients are more demanding than ever, customer loyalty has never been harder to earn or keep.

### *So, how do you attract and retain valuable customers?*

By managing business processes with an evolutionary new concept in Enterprise Business Application design. ResQ Enterprise™ allows you to gather and control information about your whole business by successfully combining conventional Enterprise Resource Planning with Customer Relationship Management functionality on one platform. This unprecedented approach creates a unique package in the industry. The result is a solution for the entire Enterprise that is capable of helping people tackle the key challenges facing their businesses today.



ResQ Enterprise™ is designed as a centralized repository of information that spans your entire organization, providing business stakeholders a full view of each customer's activity across all business units and product lines. Total Business Relationship Management gives you a 360° view of your organization, empowering employees with the

tools and information they need to do their jobs effectively.

This holistic view of your organization provides access to the information you need to examine the pulse of your company and to plan for its future. You can manage the complete life-cycle of your customers from one interface, one system, ResQ Enterprise™.

## A COMPLETE BUSINESS SOLUTION

Customer Relationship Management is a business strategy, not just a software solution. The basic principles of CRM involve: Aligning the organization around customers, sharing information across all aspects of the business, leveraging data from disparate sources to better understand the customer and anticipate their needs to maximize customer loyalty and profitability.

A CRM strategy includes marketing automation, sales-force automation, customer contact-center technologies, and customer service components. ResQ Enterprise™ is designed to optimize these processes to enhance the customer experience through management of the customer life cycle. ResQ Enterprise™ goes one step further by automating your business processes. Electronic workflow between order entry, purchasing, order fulfillment, billing and service provides seamless information flow between the sales, accounting and service departments.

## INTEGRATED ARCHITECTURE

ResQ Enterprise™ is a complete solution, designed to integrate the major components of an organization's front and back office.

ResQ Enterprise™ encompasses back office Enterprise Resource Planning. These components create interactive environments designed to help companies manage and analyze the processes associated with running your business. These include inventory control, branch management, order processing, billing and procurement.

ResQ Enterprise™ centralizes the information from these traditionally separate systems. By doing this it introduces efficiencies to the over all business processes through workflow management and business rule enforcement. ResQ provides staff with accurate, up-to-date information empowering them to make informed decisions and to work at an optimal level. This leads to unprecedented communication across departments, branches and even international locations.

## MAXIMUM CONFIGURATION

What really sets ResQ Enterprise™ apart is the architectural design. ResQ has a modern design easily allowing for Reseller's value additions or customization so the solution can align with a company's existing best practices or existing solutions. ResQ is an open solution providing complete access to its database as well as through object models for third party development.

Centralized workflow allows information to flow from one business center to another without relying on fallible paper trails. Electronic workflow enforces stringent business rules and ensures the smooth and complete flow of information through departments.



ResQ Enterprise™ frees companies from the barriers that hinder corporate expansion and allows them the opportunity to exceed growth expectations. Few companies can match the responsiveness, the value and the quality of OSI Business Automation Solutions.

## THE COMPLETE PICTURE

Sales Automation allows professionals to track and organize prospects as they migrate through the sales funnel. Sales managers can view sales activities, as



Business Automation and  
Process Control Specialists



well as sales forecasts in real-time when ever the need arises. Business rules are flexible so ResQ Enterprise™ can compliment how your sales people work.

Inventory Management and Warehousing are managed and controlled with ResQ Enterprise™. You can take a quick view of how much product is at each of your branches, how much has been allocated and how much is on order. Sales people can build orders that will pull inventory from multiple branches. Inventory is tracked from purchase to warehouse to the customer site through built-in bar-coding software.

ResQ Enterprise™'s Financials manage the numbers. It has a complete accounting component built-in allowing shipped orders to automatically create invoices and printing invoices create journal entries, automatically. Purchase orders drive vendor vouchers and vendor vouchers create checks. There is no duplication of data entry required. Management reports like income

how many orders have been booked or shipped in any time period. Quickly see on screen who is your best customer, your best product line, who owes you money.

Customer Service uses the same customer information as the Sales and Accounting Departments. Everyone can have access to information containing the customer's total experience with your company. Staff can manage all customer touch points, ensuring a good and consistent experience during every contact.

ResQ Enterprise™ ties a company together, providing complete and accurate information to allow staff to make quality decisions and to ultimately provide excellent customer service and improved profits.

ResQ Enterprise™ provides robust functionality to help bridge the gap between your current practices and your business goals. Quality software, a quality team and a focus on long term customer commitment and satisfaction; that is what you are investing in with ResQ Enterprise™.



statements or trial balances are created in real-time when ever you wish. Real-time views are available to see

*"The best thing we ever did was go with OSI for our CRM and ERP solutions. They really took the time to know our business and their software design reflects this.*

*They have been providing us with new solutions for more than 5 years now and there is no end in sight. Their software is allowing us to grow at a spectacular rate. We are now processing over 50,000 service calls per month and managing over 500 field technicians with ResQ Enterprise™"*

Peter Regnier, Efmak  
The nations #1 independent ATM sales and service company, runs ResQ in all their departments

## Configurable Dashboards



Define what's important for you to see and measure as it happens

## FEATURES

### Sales Automation

- Sales Opportunities manage the sales cycle
- Orders are created from built in price lists and real-time inventory
- Built-in complete workflow from quotes to shipping without duplicate data entry
- Automated business rules control work queues and flow
- Product Kits and Bill of Materials
- Automatic workflow audit tracking
- Built-in email and fax support
- Sales forecasting analysis and reports
- Sales cycle tracking and auditing
- Access Customer Accounting information
- Access to inventory details in real-time
- Integration with Microsoft® Outlook® calendar and email
- Centralized marketing materials
- Mail lists for mail/email merging
- Built-in Calendar and Activity lists
- To Do List Queue

### Service & Support

- Shared database with Sales & Accounting
- Customer RMA's & Tech returns
- Service dispatch for multi-product and multi-branch implementations
- Integrated mapping software for customer site and field technician tracking
- Automated Work Order creation with Inventory integration
- Track technician's stock levels
- Technician Scheduling
- PDA integration for service & sales

- Customer service history and performance/ response reporting
- Customer eSupport Web Portal for service call creation & inquires
- Field technician Web Portal for dispatched calls and call updates
- Interactive Voice Response access to service call options
- Built-in Knowledge-base
- Truck Routing & Scheduling
- GPS & Wireless Integration
- Dash-board view of all activity
- Service Contracts with Automated Billing

### Financials

- Integrated A/P, A/R & GL for complete accounting
- Automated journal entry creation for Customer and Vendor Invoices
- Invoices are driven by sales and service processes
- Dashboard views of financial activity
- Dynamic Accounting views with drill-down
- Job/Project Management Accounting
- Multi-branch Inventory supported
- Batch invoicing and check printing
- PO conversion to Vendor Invoice
- Credit and Activity management
- Access to complete customer activity from sales and service
- Dynamic financial statement creation
- SQL report generator built in for quick custom reports
- Excel® automation & Pivot Tables
- Recurring orders with auto invoices

- Automated Bank Reconciliation
- Automated work flow rules
- Zip-code tax table support
- Multi-Currency support
- Credit Card Processing Workflow
- Budgeting
- Vendor Inventory Integration
- Inventory control & tracking with image storage

### General

- Dashboard views of critical information
- Document Management
- Drill down design with detailed views
- Open system design; the latest standard development practices
- Web portal development hooks
- Existing application integration
- Web store-front integration
- Project Management Web Portals
- N-tier client server design
- Built-in report writer
- Contact Center—Email Centralization
- Data mining and analysis
- Closed loop Work flow with drill down schematic
- Acrobat® compatible PDF writer included
- Built-in Document Editor (.doc)
- Extensive Permission structure
- Telephony Integration: IVR, Artisoft's TeleVantage® API & MS/TAPI
- MS/SQL Server® Platform
- Open database with data dictionary