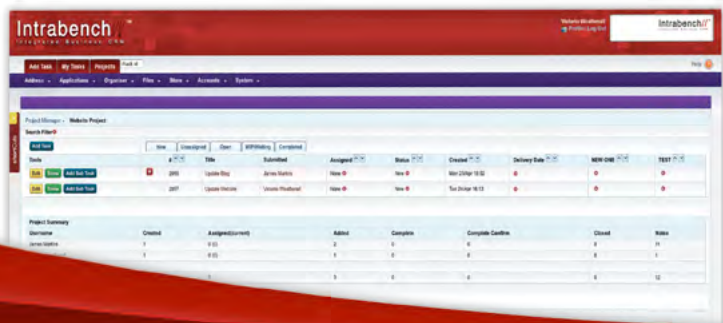


Background

Intrabench has been developed within the U.K., by Turtle Networks Ltd. Providing a completely comprehensive data management system for companies looking to improve work flow, and reduce administration overhead. The Intrabench system has been designed from a business management perspective first, with the technical aspects built around this view. Turtle Networks started designing Intrabench in 2002 as a way to manage our own internal workings and process control as a software design company. In this process, our clients started to enquire about our system and in turn Intrabench became our one single focal point. We now provide Intrabench to many companies from small to large. Intrabench is currently available in English, French, Spanish and Russian, with plans for German and Italian in due course.

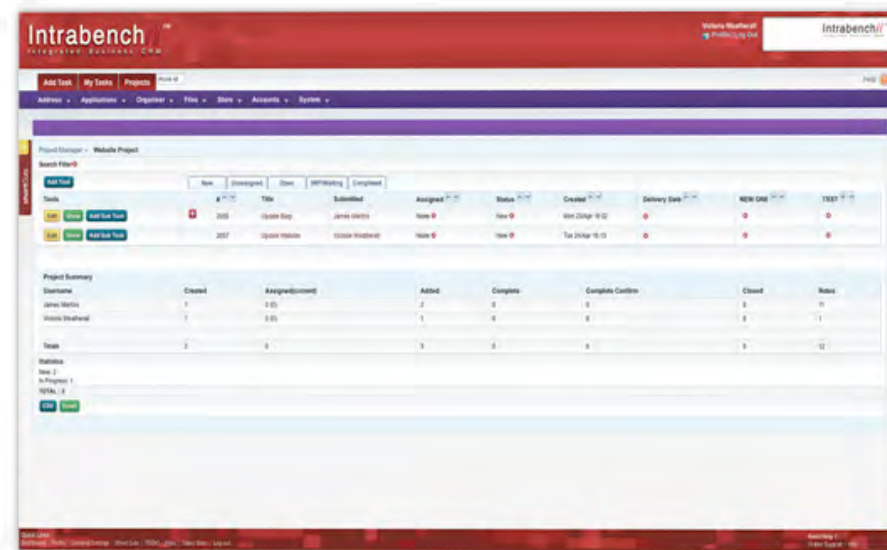
Turtle Networks' fully support the BCS (British Computer Society) and the director, Tushar Joshi is a chartered member. Therefore the ethos of the company top down is on quality software development and best practices to ensure software meets high standards.



Intrabench//TM
Integrated Business CRM

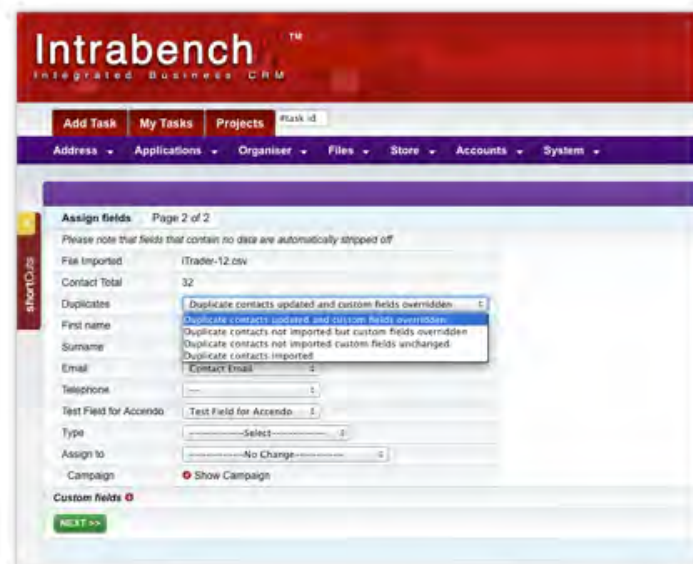
1. Supports Help Desk or problem tracking and support.

Intrabench contains a complete help desk system which allows customers or staff to create tasks. Tasks can be assigned to projects, assigned to teams, priority and statuses changed and custom fields can be created against each task. Customers can email in tasks, to support@company.com as well as login to their own area to see the status, add notes and request completion dates. Full reporting exists, with tables graphs and charts to see how long it's taking to complete a support request. This side of the system is effective, simple to use and very powerful.



Project Manager.

2. Checks for duplicates when creating new records based on user-configurable criteria.

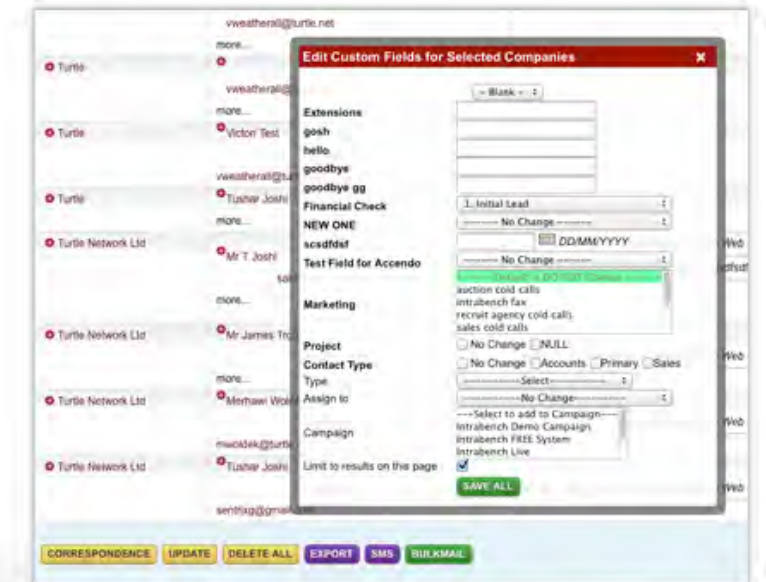


Duplicate Screen.

When creating records an icon appears indicating there is a duplicate. This check is done in the background whilst entering data, duplicates are found by searching for Organisation Name, email and/or Postcode and other configurable options

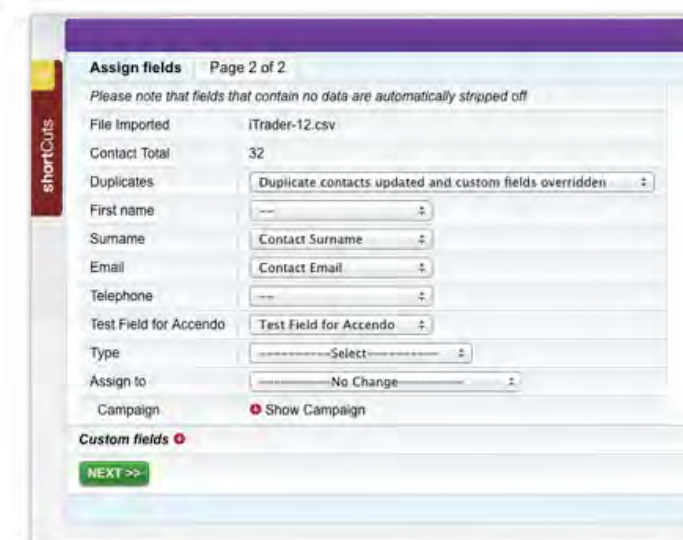
3. Provides global change / add / delete for database cleaning.

The mass update features of Intrabench allow for multiple records to be easily updated. A search can be carried out to find relevant records and then a mass delete or update can be performed on the organisational information. These results can also be mass emailed or direct mailed. Correspondence can be added as well en-mass. Records can also be merged for cleaning using the merge tool.



Custom Fields Pop-up.

4. Allows import of data from Syteline (i.e. customers, addresses, order history etc.) and other platforms, (Excel, CSV etc.).



Import Screen.

Data can be imported easily using the CSV format. Once the file has been added, Intrabench will allow you to map fields in the CSV file to fields within your database, including custom fields you have created or internal fields. The import process automatically detects for duplicates and will allow you to download any duplicated found (allowing you can cross check them). The duplicate rules can be set on importing. Intrabench has an API system which allows for external programs or systems to integrate with Intrabench's functionality. Query and update the Intrabench database and write custom functionality using the in built SOAP/XML connection.

- Allows full access for multiple remote sites and users.

Intrabench is a SaaS (cloud based) system so it's right at home when it comes to multiple users to access from multiple locations. These locations can be locked down, so external users can't login or open so your users can access information on the move or in the office.

User List.

- Supports import and display of current sales history and quotation data from ERP system either through integration or a semi-automated or regular manual import process.

- Supports import/display of current accounts information such as 'account on hold' from ERP system either through integration with ERP or semi-automated or regular manual import process.

Import Screen.

As data can be imported into the Intrabench CRM system, information can be updated from external systems, either manually or using the Intrabench API by writing an automated update routine. Intrabench contains credit limits as well as account locks which prevent quotes or sales being created once an account reaches it's limit. Locks can be overridden by key personnel and are automatically unlocked once invoices are paid.

- Supports integration with ERP RMA system for repairs/help desk use.

RMA integration can be achieved by linking updates of the ERP system to either correspondence and/or the ticketing system. When an RMA is raised a ticket on the help desk can be raised at the same time linking the task to the RMA, updates can then be made against this RMA ticket number which in turn update the Intrabench system ticket.

Project Screen.

Import Screen.

Intrabench contains a full invoicing and quoting system along with reporting and statistics functions. You can drill down and see who your customers are, when they last bought and who hasn't bought recently. You can target customers who have bought certain product groups as well as those that haven't. Importing data from another ERP package is also possible by importing a CSV list of quotes/invoices.

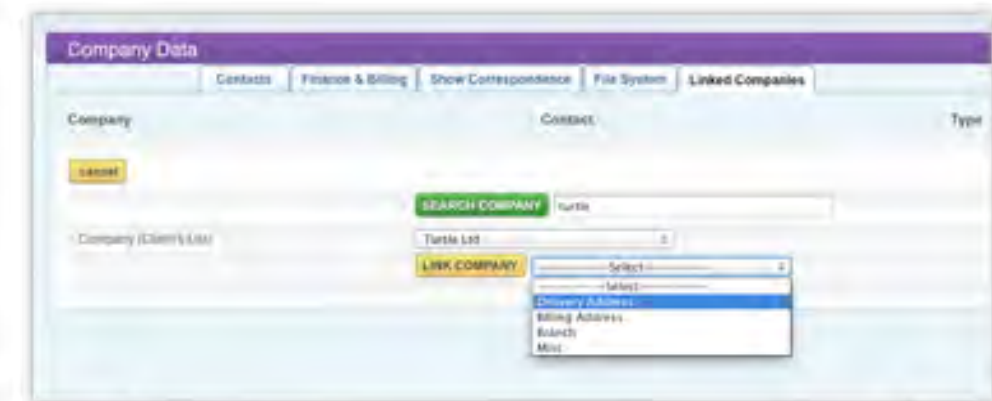
9. Records unlimited addresses per organisation, contacts per address and events per contact.

Intrabench allows cross linking of companies, e.g. Accounts, Finance, Technical or Support can all be created and interlinked. These can either be existing companies or companies added. Each company can have multiple delivery addresses and these details can also be imported in to the system. Each organisation can have unlimited contacts and correspondence/ events added to each. These can be linked to either a contact or the organisation and then viewed and printed out to a PDF.

Functions	Contact	Details
Mr Ward	Mr Ward	E-mail
Mr Andy Russell	Office Management	E-mail
Mr Andy Russell	IT Management	E-mail
Mr Andy Russell	IT Management	E-mail
Mr Andy Russell	IT Management	E-mail
Mr Andy Russell	IT Management	E-mail
Mr Andy Russell	IT Management	E-mail
Mr Andy Russell	IT Management	E-mail
Mr Andy Russell	IT Management	E-mail
Mr Andy Russell	IT Management	E-mail

Company Contacts.

11. Enables entry of procurement dept. / address, work dept. / address, etc., and displays relationship between contacts / depts.



Link Organisations.

Contacts can be linked to addresses and their relationship specified. Each contact can have a main company link and secondary links to other companies or addresses within the same organisation.

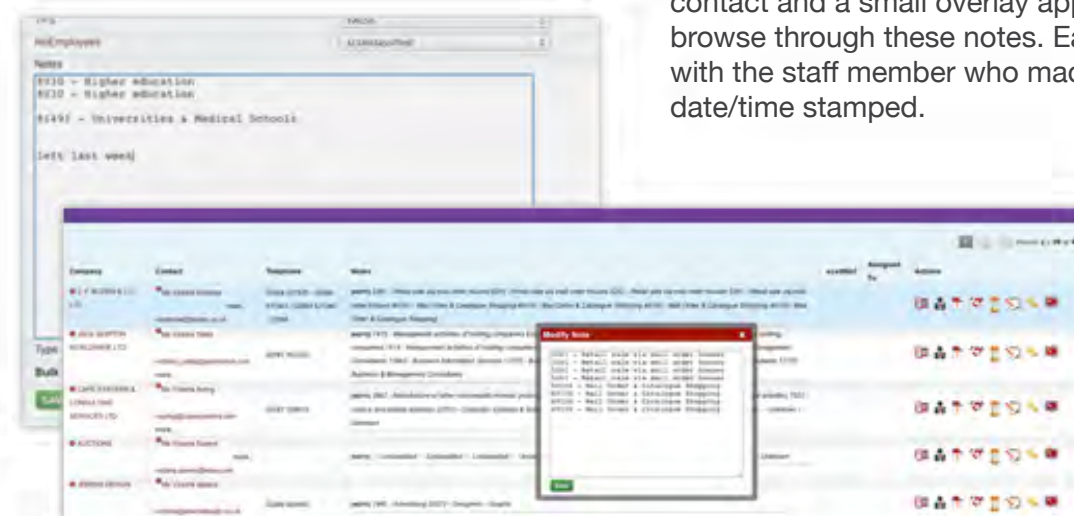
10. Records contact status, e.g. left, retired.

Using custom fields, a contact can have a field that states their status. These can be updated over time and new field items added. This can be viewed and searched against. Periodically contacts marked as left can be searched for and purged.

Edit Contact Page.

12. Supports adding free text notes to an organisation, address or contact and gives clear indication that notes are present.

Notes that are time independent can be added against the company and/or contact. These are viewable on screen where you can see the contact or company records, there is no need for additional clicks to view this information. Time dependant notes can be added such as correspondence or notes such as meetings, calls, letters, reminders, calendar events and more user definable entries. These notes can be see via an icon that appears next to the company and contact and a small overlay appears so you can browse through these notes. Each note is marked with the staff member who made the notes and date/time stamped.



Edit / View Notes.

13. Records interests, mailing requirements & preferences, opt-in / opt-out choices & dates, sources, etc.

The screenshot shows a web form titled 'Edit Contact Screen'. It has a 'Type' dropdown menu with 'Bulk email recipient' selected. Below it, there are radio buttons for 'Yes' and 'No', with 'Yes' being selected. A green 'SAVE' button is at the bottom left.

Edit Contact Screen.

Intrabench contains contact preferences for companies and contacts within the system. These are automatically used when you send out mailers and the users can choose to opt out whenever they want. Email addresses that bounce are automatically removed. Using custom fields, you can store the source of the contact, preferences and dates. Intrabench automatically includes unsubscribe links in emails and you can override these settings in the control panel. Email preferences can be created using custom fields and changes to these are time stamped.

14. Records products purchased/quoted or simply enquired about for targeted communication.

Company Data					
Type	Reference	Client refPO	Status	Date	Amount
Credit Note	7115-20120314		Incomplete	Created: 14 March 2012	£ 1201.00
Invoice	7067-20120113		Invoice Credited - Unpaid	Created: 13 January 2012	£ 1201.00

Company Data					
Correspondence (From/To)	Method	Subject/Comment	Last	Next	
From: Victoria Weatherall To: Company's Email Address	Bulk mailing	Job notification	Tue 21/Feb/2012 15:07	Not set	
From: Victoria Weatherall To: Company's Email Address	Email	Invoice	Fri 13/May/2012 9:48	Not set	
From: Gloria Shawley To:	Bulk Mailing	Is your business worth an investment of £50?	Fri 13/May/2011 17:31	Not set	
From: Tushar Joshi To:	Bulk Mailing	Visit London Exhibition 2011 - Exhibit and Promote your business offer for 25 pounds	Fri 6/May/2011 37:46	Not set	
From: Tushar Joshi To:	Bulk Mailing	12th April London V2 - 7th expert marketing prices (please read)	Thu 31/Mar/2011 2:28	Not set	

Company Data.

Intrabench can show you a list of products a customer has enquired about either by looking at quotes, statistics or a custom field to link the customer to products interested in. Quotes can be searched and you can for example find all organisations located in the south of France that have purchased a particular product in the last 4 weeks. You can then use this list to email, mail merge, direct mail, SMS or phone. Intrabench also supports sending direct mail from within the system so you don't even need to lick a stamp!

15. Supports move, merge & purge of contacts / addresses / organisations / event history.

The screenshot shows a 'Merge Screen' with a list of contacts. Each contact has a checkbox to its right. The contacts listed are: Intrabench, Intrabench, NLIS Hub, NLIS Hub, iBase Media Services, iBase Media Services, Red Booth LTD, Red Booth LTD, Red Booth LTD, 7ICAANE, and 7ICAANE. A yellow 'MERGE' button is at the bottom.

Merge Screen.

Moving and merging companies and contacts can be performed using the merge module, it's easy to move contacts as well as select a group of contacts and delete them. The system automatically cleans any data linked to a contact on delete and purges the records and events. These features can be restricted to certain members of staff.

16. Auto date-and time-stamps notes/events; auto-adds author name.

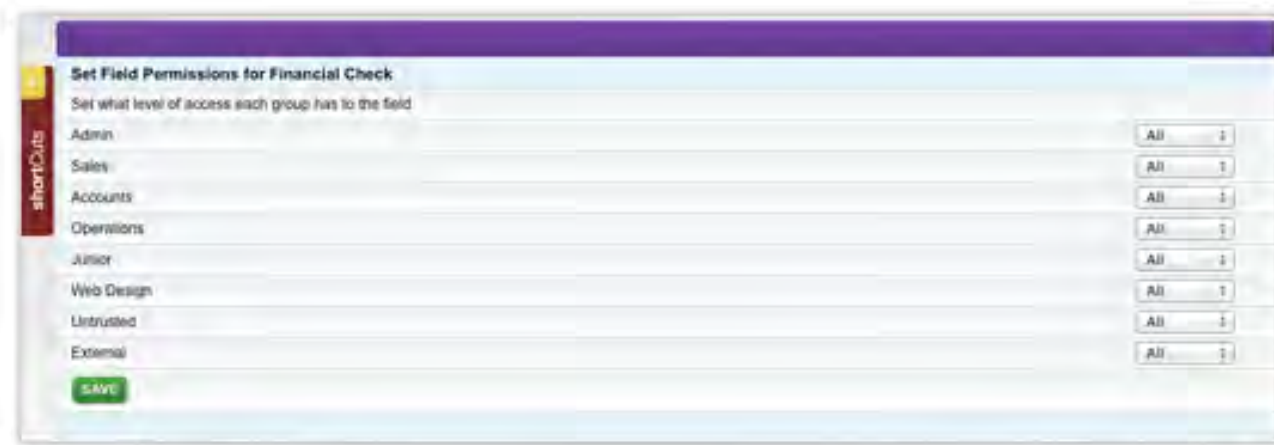
The screenshot shows a 'Date Stamp Fields' window. It has a 'Live; (22/11/2011);' status and a 'Category' field. Below it, there's a 'Correspondence (From/To)' table with columns for From, To, Method, Subject/Comment, Last, and Next. The table contains several entries with dates and times. A 'Last' column on the right shows the most recent timestamp for each entry.

Date Stamp Fields.

Intrabench automatically time/date stamps and adds the authors name against any correspondence added. It also time and date stamps changes to company fields, invoices, calls, calendar entries and quotes. Part of Intrabench's appeal is knowing who has updated what and when. Statistics can be viewed about the number of entries made per user per day as well as drilling down to see them.

17. Enables security filtering according to note / event category.

Intrabench allows you to configure who can access what, and each staff member can be assigned different levels of security clearance to your data. You can assign this to groups such as Sales staff and allow access to only certain groups of customers and to updated only certain fields. This can be configured and designed to meet your exact needs.



Group Screen.

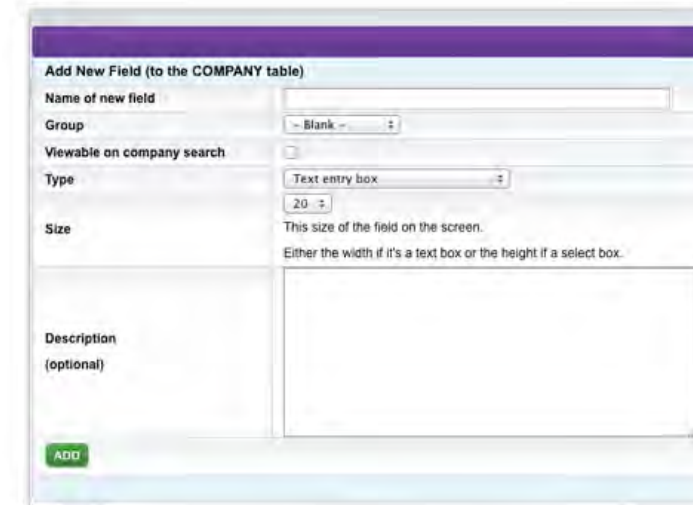
18. Integrates with word processor; documents can be created/merged directly from system, copy stored against relevant record(s).



File Areas.

Documents are created in Intrabench using the built in word processor, these documents can then be printed to letter, mail merged with address and contact details and then exported. These documents are linked against the contact and date time stamped. Extra documents can be uploaded in to the system and stored against the contact in the file area for that customer. Intrabench contains a document management system for internal, external customers as well as a file area for customers to login to access and add to their own internal file area.

19. Supports user-defined additional fields / attributes.

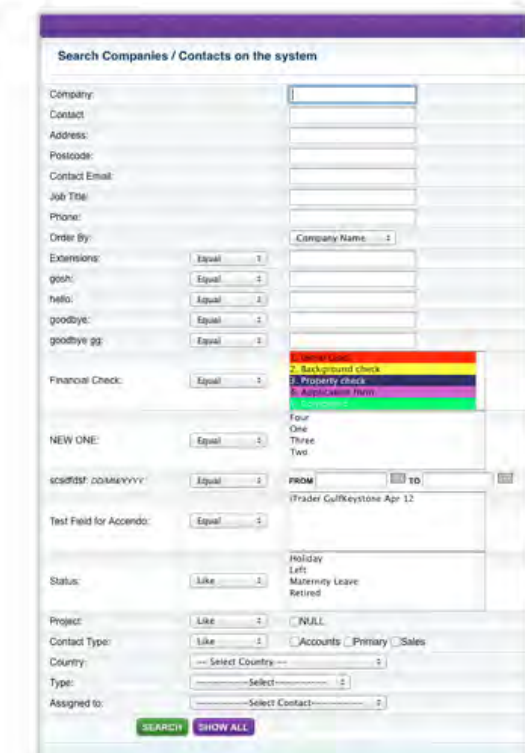


Custom Fields.

You can create additional fields in Intrabench which can be against the Company, Contact, Event, Products, Form, Wiki and many other areas within the System. These fields can be from the following list, drop down boxes, select boxes, radio buttons, tick boxes, date, date time fields, free text, file fields, multi- select boxes, groups, urls, users and more are being added all the time. You can restrict access to these per user, search through them, drill down, update, and change.

20. All contact fields index-able/searchable for look-up/filters/groups.

Contacts can be searched for in the system by selecting combinations on the search page. These can be custom fields or built in fields and you can find the contact you are looking for. If more than one is found a list is shown on the screen and from this single place you can perform many functions with one click. Filters can be colour coded to make usage easier.



Search Screen.

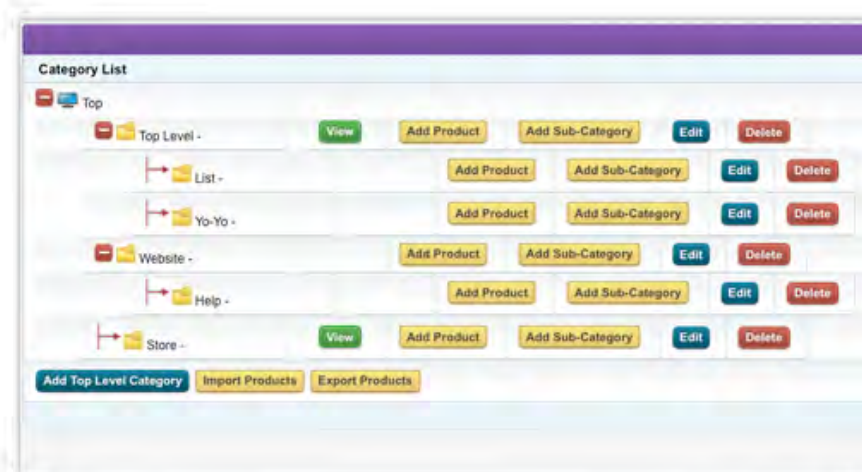
21. Supports an Internet knowledge base.

Intrabench contains an extensive Wiki (knowledge base), again you can have custom fields against this and updates are made using a build in word processor. These notes can be searched for and updated, updates are also emailed to staff. The Wiki also allows images, videos and files to be linked in, as well as the usual tabular data, forms, font and colours.



Wiki Screen.

22. Supports customer-specific Internet content.



Online Store.

Intrabench contains a total e-commerce store which is unified with the products you use for your quotes and invoicing. These can be imported and the users can view pricing relevant to themselves which includes discount plans, pricing and groups. The online store can be designed and customised using style sheets and templates and has complete flow from product details right through to order processing and delivery notes, packaging labels.

23. Optionally downloads web-based enquiry form direct to system and alerts relevant staff.

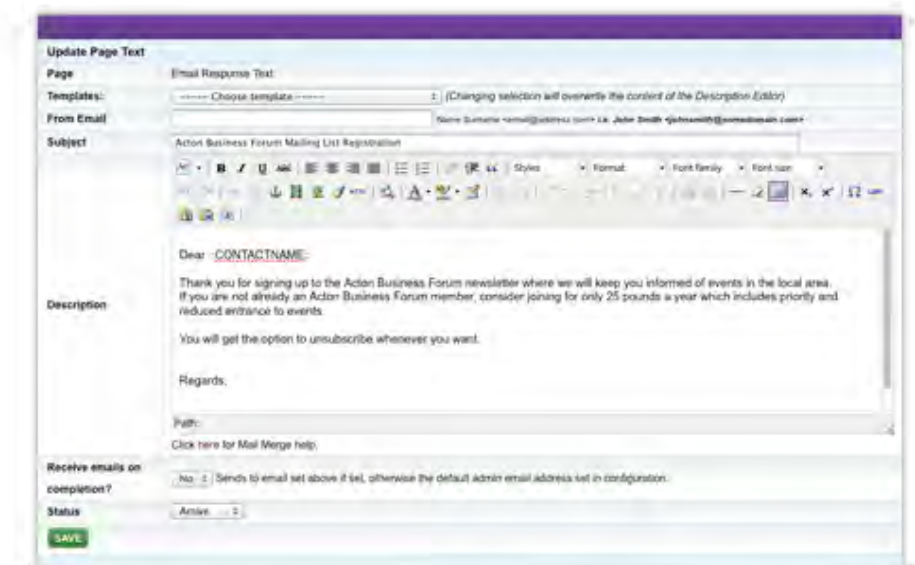


Intrabench contains a complete form creation system, with custom questions, fields and pages. These can look just like your website and can be customised. When a customer or someone on the web fills this in, your staff are alerted and an email is fired back to the customer automatically. Intrabench shows these customers in a list so you can market to them in exactly the same way. You can link these forms transparently directly in your website.

Examples of forms used on websites.

24. Supports prospect entry.

Prospects can be entered into Intrabench using the opportunity management module, this links directly to the rest of the system and you can enter in a value of order, date to start, title, description and probability of completion based on stage or any other custom fields you wish to create and link the opportunity to quotes and invoices. You can on the fly calculate estimated income based on these opportunities combined with probability across all members of staff.



Edit Forms.

25. Enables creation of new records where full information not available, e.g. email address but no postal address.

Intrabench does not dictate that all fields need to be filled in, you can customise obligatory fields. In practise it's best to let the user choose and this also makes operation quicker. Details can be updated later and Intrabench allows you to enter organisation and contact details on one page to speed up data entry.

Additional contacts can be entered in at a later stage with ease.

Contact Entry Screen.

27. Supports lead origin by channel and specific activity (e.g. Exhibition – Civils 2012) & status tracking from initial enquiry through quote to order at company and individual contact level.

Edit Fields.

All lead status changes are logged and date and time stamped, therefore it's possible to drill down to find organisations/contacts tagged with a special activity and track the status of each. A report can be created to show how the statuses have changed over a time period and how many are in each group.

Using the opportunity system this result can be combined to product detailed reports including value of business and time taken for the order. Workflow management can help with organising status changes.

26. Distinguishes at organisation and contact level as lead, qualified prospect, has had quote, is customer, etc.

Custom Fields.

Using custom fields it's possible to specify details at both contact and organisation level. These custom fields allow you to set up lead status and additional indicating attributes about your contacts. Quotes generated are automatically flagged up on the record so you can see who you've quoted for as well as marking who your customers are.

28. Events (e.g. correspondence) can be linked to other relevant records, e.g. quote or order.

All quotes and /or invoices can be linked to correspondence. This way when a quote is sent out it will be time stamped with a correspondence entry and also a reminder date is set as when to chase up the quote. The entire call back system integrates with email so you never miss a call back or forget to chase up a quote.

Quote / Invoice Screen.

29. Supports email list management with bulk emails auto-added to event history on all selected records.

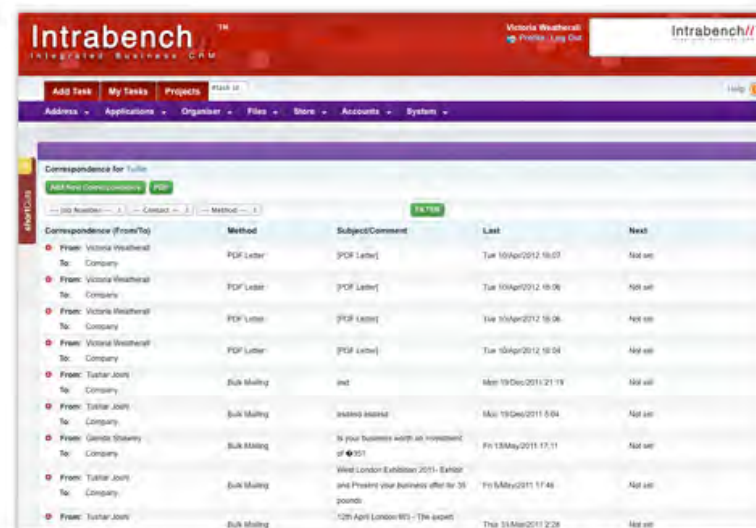
Bulk email and bulk direct mail can be achieved from Intrabench. Direct email is sent from Intrabench and logged as correspondence, if required, against those that sent the email.



Bulk Email Detail.

Tracking is also performed and you can track who has received, opened, clicked and unsubscribed from an email communication. Statistics and reports are shown and you can use this report interface to further market to the customer. Direct mail is sent from within Intrabench, including printing and posting in the background.

30. Integrates with MS Outlook; enables creation of contact record from incoming email.



Correspondence Screen.

Microsoft outlook can be linked to Intrabench so that incoming emails can be CC'd into Intrabench.

Intrabench then stores these emails under the contact's correspondence so that all communications can be seen in one place. If the contact doesn't exist, Intrabench will create the contact record automatically within the system and try and link this to an existing organisation.

31. Provides calendar / task functionality or integrates with MS Outlook Calendar; auto-adds event record when task / action complete.

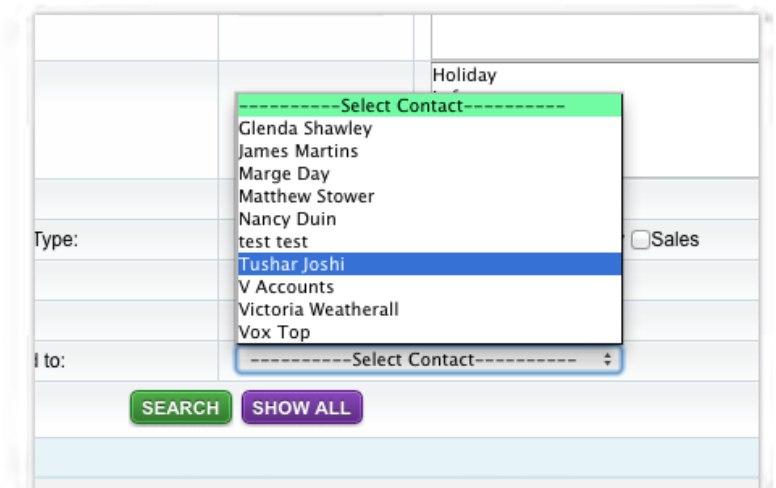


Calendar.

Intrabench has a detailed calendar within the system which can be accessed from anywhere on the move. Users on the system can view their tasks, groups of tasks and availability of others on a particular day. An overview shows how busy people are and all new events, or calendar entries are sent to Outlook as a reference.

32. Supports assignment of sales representative per prospect or customer.

Each customer can have sales representative assigned to them. You can then further limit the ability of other sales reps making changes to the account if they are not the allocated rep. Sales reps can search for all contacts assigned to them and order by the last contact date either oldest first or newest first to see who they haven't contacted recently.



Assign To Selection.

33. Allows creation of rules for auto-assignment of account manager, e.g. by country.

Groups		
Functions		Name
View DELETE		KL Test
View DELETE		Sales
View DELETE		EMEA
View DELETE		America
Add		

Groups.

Auto assignment is currently done on import of a record but can also be done when a customer fills in a request form with the system (e.g. web based system). At the moment there is no way to setup auto assignment rules but this is a feature that could easily be added as it has not been requested before. Contacts at the moment appear in a pool and sales reps can pick records in the central pool.

34. Supports lead probability tracking per prospect or customer.

Lead probability tracking is covered in opportunities where you can set the probability of each lead status stage. This is then viewable on the reporting screen where you can see the likelihood of prospects completing and a value for each.

Opportunity Configuration for Stages			
DELETE EDIT	New		12%
DELETE EDIT	Quote Sent		15%
DELETE EDIT	Price Agreed		33%
DELETE EDIT	Sold		100%
Add New Stage View Custom Fields			

Opportunity Stages.

35. Supports tagging individual contacts for mailings, etc. where there is no common data to query by.

Active Campaigns						
Functions						Title
Delete Export (CSV) Edit Communications View Registered						Intrabench Demo Campaign
Delete Export (CSV) Edit Communications View Registered						Intrabench FREE System
Delete Export (CSV) Edit Communications View Registered						Intrabench Live
Delete Export (CSV) Edit Communications View Registered						Intrabench Trial
Delete Export (CSV) Edit Communications View Registered						testr
New Campaign						

Campaigns.

Using a custom field, contacts can be tagged for individual mailers. This is common practise and allows for the contact to then be searched for using this custom tag. The list can be exported, emailed or direct mailed using the bulk emailing intrabench system.

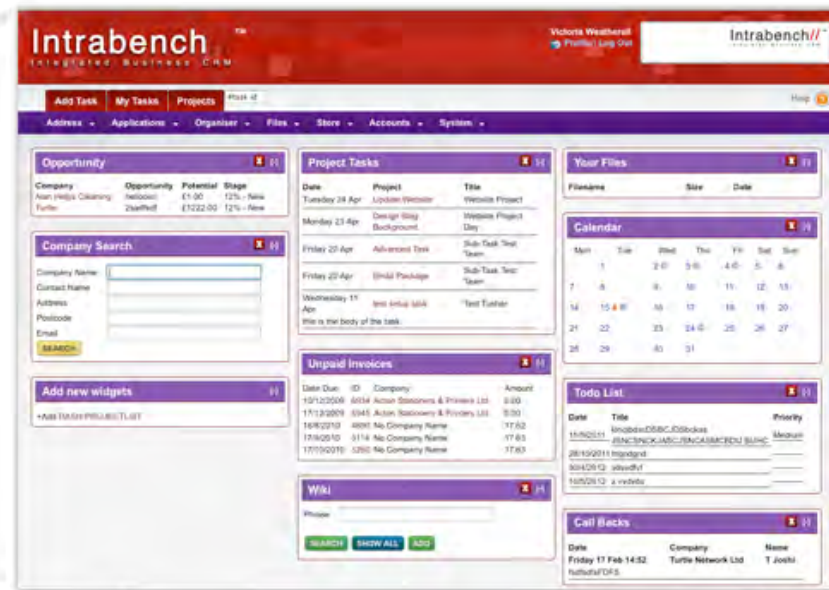
36. User can create, re-use and share multiple queries / mail groups / filters.



Shortcuts Tab.

In Intrabench, all searches, screens and queries can be saved, shared and changed. A shortcuts tab appears on the left of the screen always allowing you to get to the part of the system you most use quickly. This can also be made your home page so when you login you are taken straight to your screen. Any filters you select can be saved in your shortcuts panel as well as any mailing groups you use regularly.

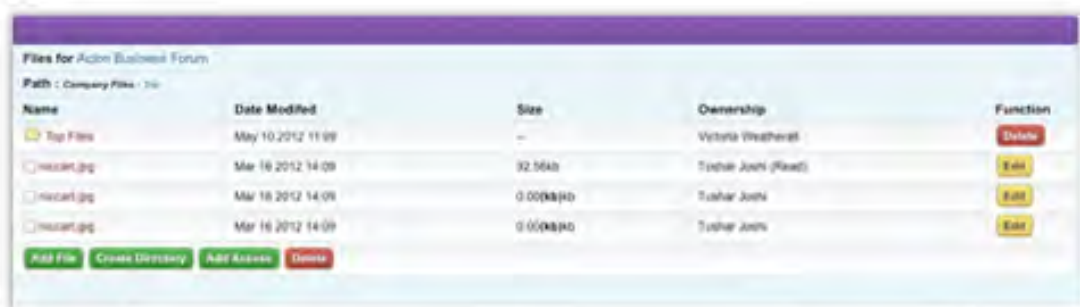
37. Provides real time 'view' of all outstanding scheduled activities - calls, quotes, to-do's etc.



Dashboard.

Intrabench has a screen which lists call backs that need to be made, grouped by staff member and visible by day. The screen also shows a list of missed call backs as well as a list of calendar events, to-do entries and project tasks. The dash board shows most of this information in an over-view so you can see from one screen what you need to do.

38. Supports document attachments or links per contact/customer.



Add Files.

Each company and contact has a file area where documents, spreadsheets, images, videos, products, word documents and PDFs can be linked internally. These files can then be accessed from anywhere (if you have permission) and can be uploaded, changed and downloaded to any PC. There is also a public file area in Intrabench for company document management and a personal file area for your staff. Files can be shared or emailed to people from here or simply provide a link to the file so others can view it without Intrabench access.

39. Supports online enquiry of contact history; all related information clearly accessible without multiple clicks or windows.

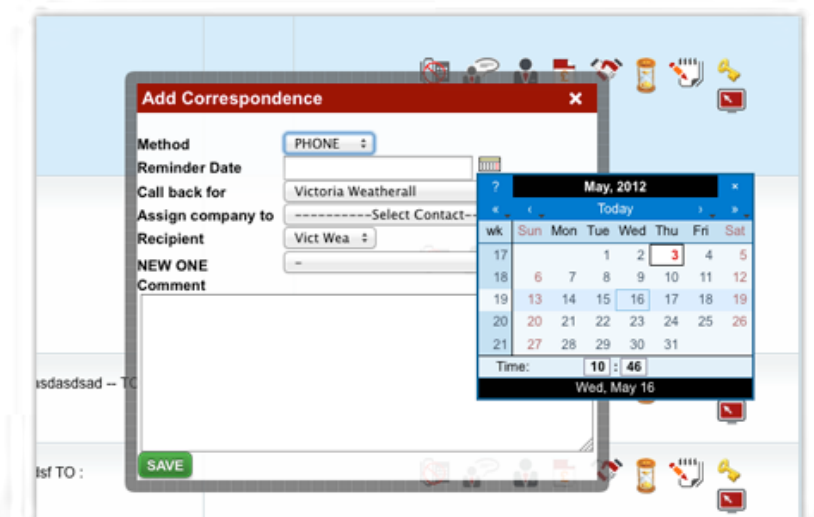


Correspondence Screen.

The complete contact history of an organisation or contact can be viewed with a single click from either the company overview screen or the search results screen. Items can be filtered through for example quote emails, call backs, notes, meetings, calls, letters or emails. However to save on even one click, the latest correspondence and call back is always visible on the search results screen.

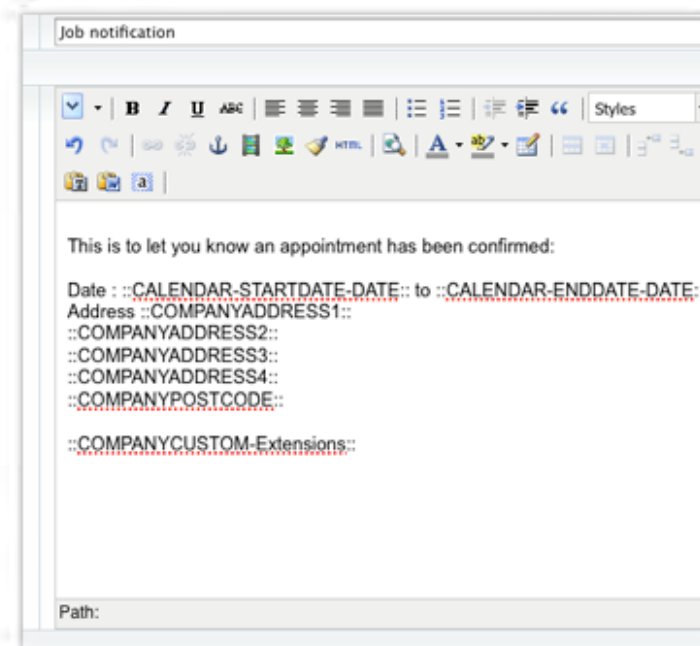
40. Enables scheduling of next event when individual or bulk history records are written.

It's possible to bulk add correspondence and call backs to a set of records. However using the campaign management part of the system contacts assigned to a campaign will automatically be scheduled for the next activity. A campaign example could be designed to email customer after 2 days, send letter after 4 days, call back 5 days later, another email 10 and 14 days later. Emails and letters are sent automatically, call backs are made by sales staff. The contact may move through multiple campaigns in their life cycle.



Add Call Back.

41. Provides mail merge facilities to documents, emails or labels, with auto event update in history.

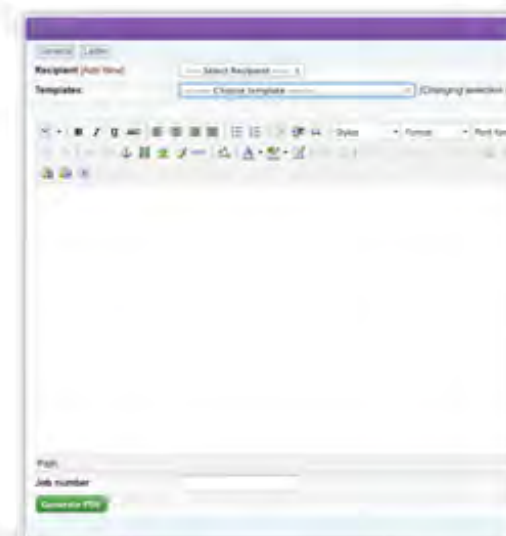


Mail Merge.

Intrabench has complete mail merge with full details, including address, name, company and any custom fields you may have created. Programming logic can be put in to mail merge to make the letters look more personalised. Furthermore mail merge may be applied to SMS, email and direct mail. Using email templates makes this task easier and when you send a single email you can select an email template so you don't need to type out the same email again and again. Labels can be created using the export to PDF option (custom template) and entries are also added to the history.

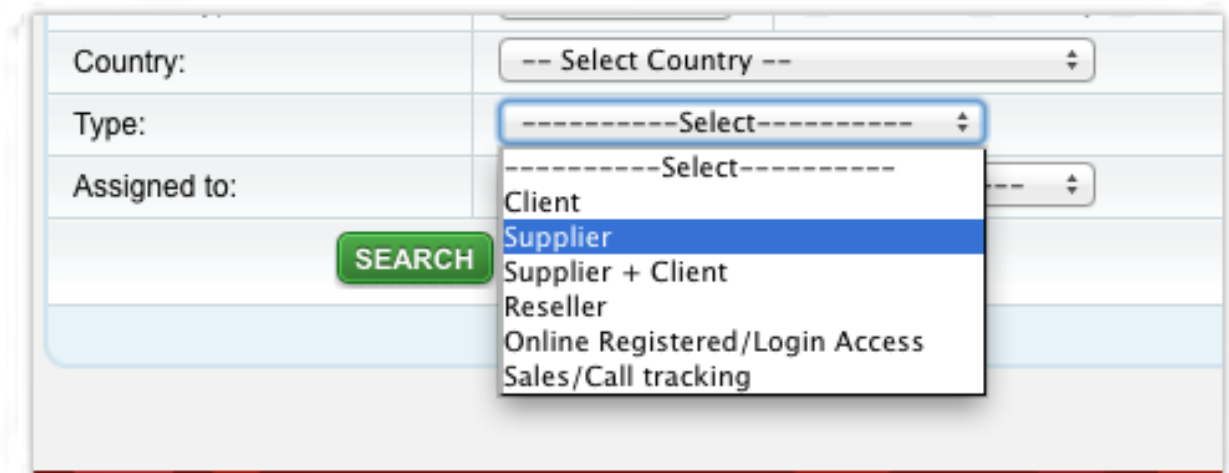
42. Intelligently processes address info for DM, e.g. excludes record where address is missing or incomplete & reports excluded records.

Intrabench allows for direct mail to be sent, either by printing to your own printer or using our gateway that automatically sends post on your behalf. Letters with no postcode, no second line of address and those with incomplete details will not be mailed. A report is then downloadable to see which contacts and addresses were missed so that details can be filled in correctly.



Generate Letter.

43. Manages contacts with external marketing suppliers and supports or can link to purchase orders.

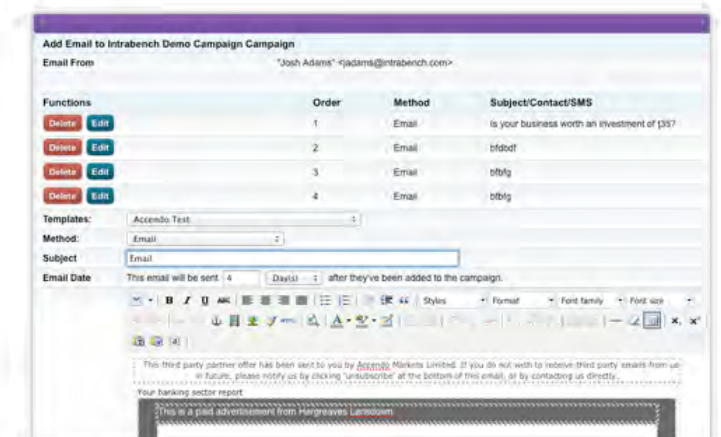


Assigned To.

Intrabench has a built in purchase order system. You can add your suppliers in to Intrabench and flag them up as suppliers. In this way you can search for them and create purchase orders in PDF format. Purchase orders automatically create a unique reference and can be searched and exported from the system.

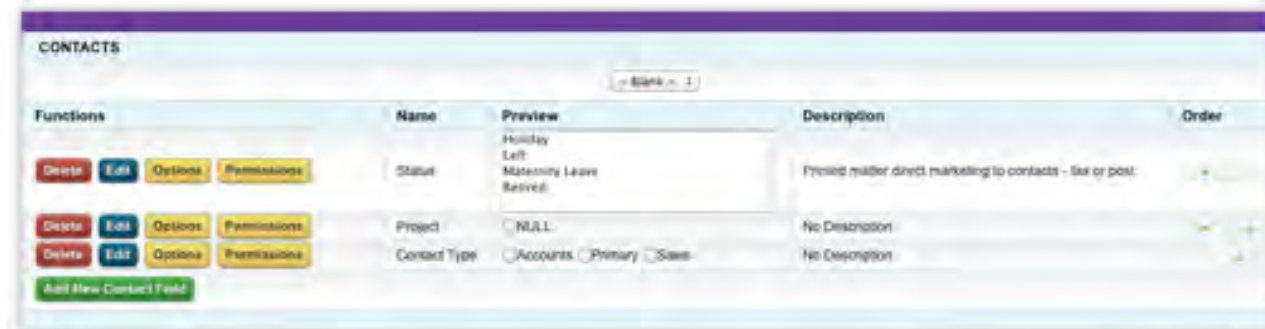
44. Manages press advertising and PR (media details, contacts, publishing deadlines, mail merge).

In a similar fashion to supplier Intrabench can manage PR contacts, correspondence with each of them, media contacts and you can set up reminders for deadlines as well as entries in your global calendar. The mail merge facility exists like other parts of the system where you can mail merge your email templates, press release information with the contacts name, address and any other details you hold against their record to truly personalise communication. PR contacts can be automatically chased up from Intrabench to check they have received the communication by use of the campaigns module.



Campaign Screen.

49. User defined priority codes.



Custom Fields.

Each task can have custom fields and can be assigned a user definable priority code. There is also an internal priority field which can be used or hidden. Priority codes can be listed on the summary view as well as statistics created against the codes.

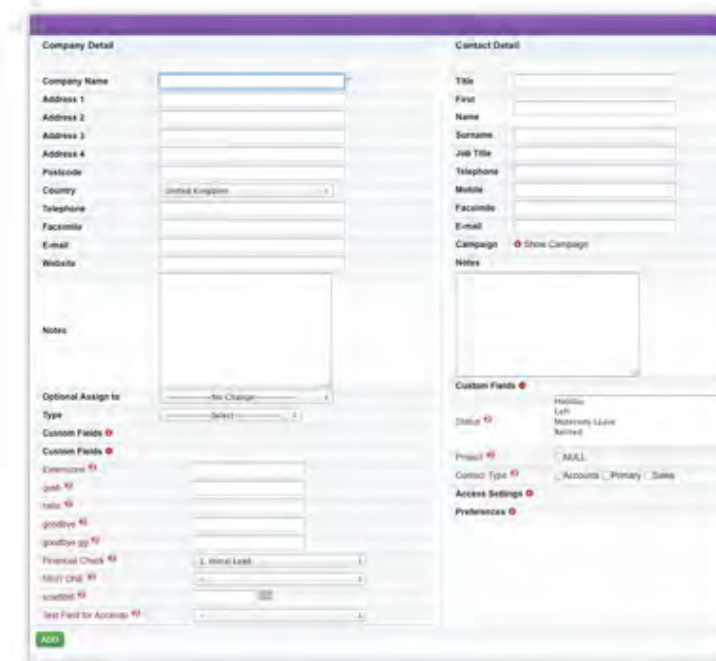
50. User defined minimum response time requirements.

You can configure SLA's for tasks, this could be time to assign the task, time to complete and time to close the task. It's also possible for the user submitting the task to specify their required date and then a manager set the agreed date based on this date. Customers can login to see and submit tickets, field agents can login to see work allocated, changes and communicate with the customer.



Assign Delivery Date.

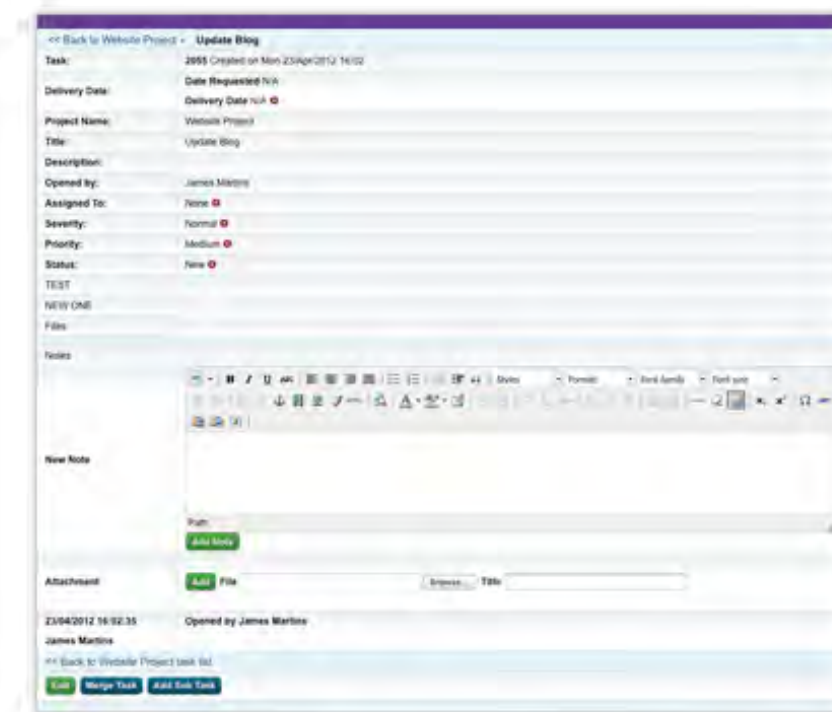
51. Supports entry of service personnel by company, division or cost centre.



Service personnel can be entered as system users with an address specified for each. This way you can also create groups for service personnel.

Add Company Screen

52. Help Desk tracks customer and contact.

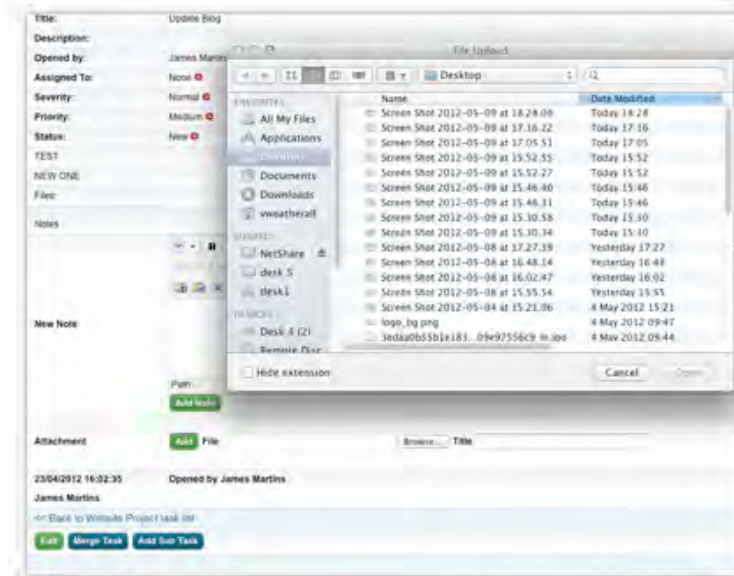


Task Detail Screen.

Each help desk issue/task is linked to a company and contact within the system. You can drill down and see a list of all tasks by a particular company as well as a user. All communication is via configurable email communication.

53. Links to support resources (documents, web pages) by product or by order.

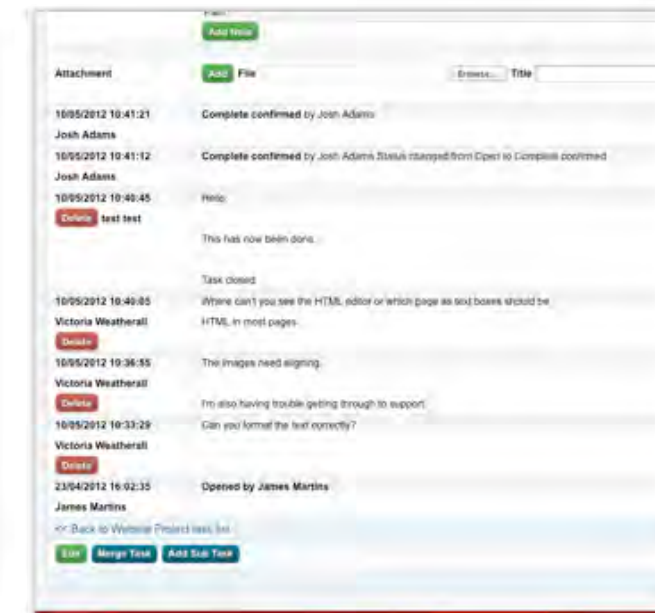
Each task can have files attached to it, either via email automatically or added by a service engineer. Additional links can also be added as either a custom field or in the notes section as the notes section allows embedding images, audio, video and documents. These links can also be to products within the system.



Add Files to Task.

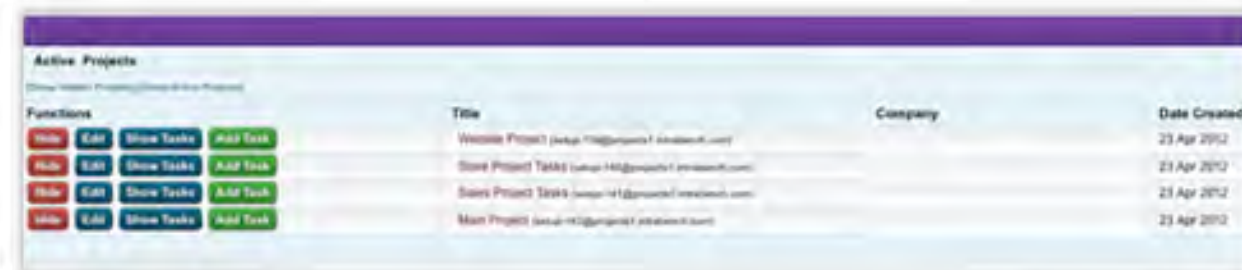
55. Help Desk allows unlimited note entry.

Each help desk task allows for any number of notes to be added to a task. These are entered either via email or via the help desk software directly. The help desk software allows for text to be entered similar to a word processor. Files can also be added.



Add Notes to Tasks.

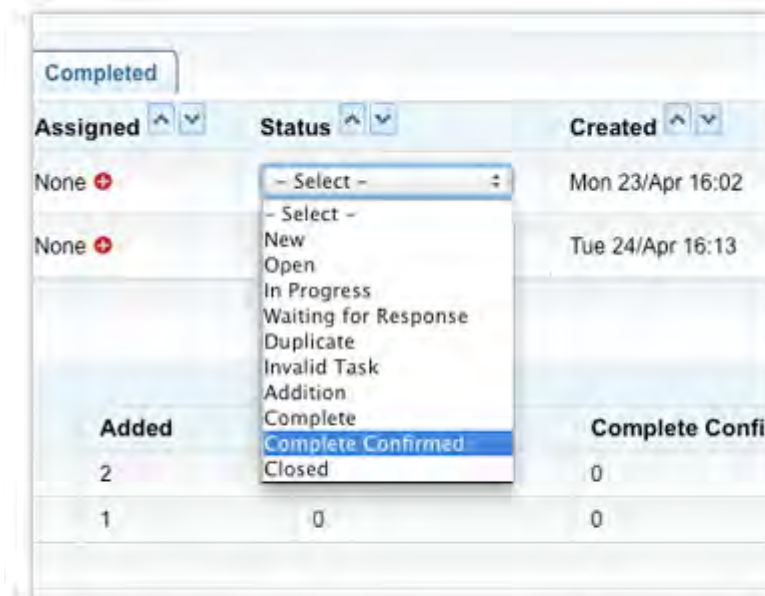
54. Tracks customer complaints & resolution.



Project Screen.

A separate project can be created to track customer complaints and resolution. These can be processed differently to other projects and you will be able to see a list of complaints. Each complaint can be completed and the confirm completed for QA purposes. The task will close automatically after a duration of no activity from the customer.

56. Help Desk allows entry of solution or resolution.



Project Manager.

Help desk system allows for entered a resolution description when the task is completed.

This can either be a note or an actual resolution comment. Once a resolution has been added the task is automatically set to complete.

57. Help Desk allows routing to responsible parties for resolution.

#	Title	Submitted	Assigned	Status
2055	Update Blog	James Martins	- Select -	New
2057	Update Website	Victoria Weatherall	- Select -	New

Assign To.

The help desk system allows assign as task to a particular team or person to deal with. That person, or team will receive an email to alert them to a new task in their queue. They can view the tasks assigned to them in the task dashboard.

58. Online query of open cases or reported problems.

Task Search .

Cases can be searched for and open cases listed on the screen. Managers can see a list of cases and who is assigned to each, the powerful interface allows for one click updating without changing the screen. From here tasks can be re-assigned, dates assigned, merged, closed, priorities changes, severity set, custom fields added or changed, sub tasks added and tasks moved to sub tasks all without changing the screen from the open view of tasks. Furthermore the bottom of the screen shows reports all the time on case totals and work carried out by staff.

59. Online query of response times.

Created	Assigned(current)	Added	Complete Confirm	Closed	Notes
1	9 (0)	2	0	0	11
1	0 (0)	1	0	0	1

Status Updates.

The help desk system shows a report for response times for tasks, this includes time to first acknowledge a task to the time to carry out the work. As well as this task time estimates can be put in and compared to actual time for the case. Over time as cases are categorised, time estimation can be automatically calculated based on the case categorisation and past case history.

60. Standard report for open problems by category & assigned engineer.

Email Reports.

A report for each engineer can be produced showing the tasks they have been assigned historically by how many, status and how long they have taken as well as amount of work carried out. The task screen can be drilled down to the tasks they have open by simply clicking on their name and a screen will show the open tasks for them. They can also see this screen to see what work they have to do.

61. Standard report for total calls and time spent by customer and category.



Statistics Screen.

A report shows the number of calls, correspondence, emails and meetings each customer has had. This report is broken down by staff members and by clicking on the number you can drill down in to a particular day for a customer and see what has been achieved.

References:

Reference 1

Reference Company Name: Accendo Markets
Reference Company Address: Accendo Markets
64 London Wall
London
EC2M 5TP
2007
Customer since
Contact Name: Shahed Zaman
Phone: 02030517461
e-Mail: sz@accendomarkets.com

Any Other Relevant Information Financial markets, staff of about 25 using CRM to manage marketing, sales and work flow

Reference 2

Reference Company Name: Kaspersky
Reference Company Address: 97 Milton Park
Abingdon
Oxfordshire
Customer since 2011
Contact Name: Kevin Wood
Phone: 07590735386
e-Mail: kevin.wood@kaspersky.com

Any Other Relevant Information Popular anti-virus company using Intrabench for project management, case management and helpdesk across all country regions. Reporting by managers and resource allocation based on work load.

Reference 3

Reference Company Name: Airclean Ltd
Reference Company Address: Bays 2 and 3 Pattenden Lane
Marden
Tonbridge
Kent
TN12 9QS
Customer since 2008
Contact Name: James Ford
Phone: 01622 832777
e-Mail: James@airclean.co.uk

Any Other Relevant Information Manufacturers of airfilers, use Intrabench for complete ERP, invoicing, quotes, discounts, despatch as well as marketing, online shop and CRM

Methodology:

Consultancy will depend on the number of days you require to get up and running, on-site training and initial customisation is best and will involve importing data, setting up custom fields and configuring help desk software, this process normally takes about a day of set up with details on how to configure passed on to the CSL internal project manager who can tweak settings based on the knowledge of CSL. There will be an initial set of requirements that will include data to be provided for the initial system, which includes data export of customers, invoices, quotes, tasks, staff/users, custom fields and example forms (paper/electronic). Using these details it will be possible to create a system that can be used for training and tutorials.

Data conversion is usually done on the fly whilst importing into Intrabench as Intrabench deals with mapping data on import. This process usually takes about a day to set up and import but depending on the format can take a few minutes if the format is already in CSV/Excel.

All in all, setup normally takes around 2 days to complete as the package is already setup to deal with most requirements. More time will be needed to tweak based on user feedback but this is generally an ongoing process once users get more familiar.

Intrabench also has a number of training videos and documentation which explain how various sections of the system work in bite sized 5 minute videos. However the great thing about Intrabench is that considerable time is spent making the system intuitive and simple to use so that a basic user can get up and running with the system quickly.

- Training includes customisation and configuration so that the CSL project manager can get up and running with local changes as quick as possible (once initial set up is done by Turtle)
- System admin, such as adding users, viewing logs and access privileges, importing data and exporting reports.
- Database admin is not needed and is carried out by our system admins if there is a need.
- GUI customisation is carried out by creating custom fields and changing access levels for staff. If a feature is not needed by a member of staff it can be hidden. Likewise all menus are dynamic based on the users access levels to the system. The basic look and feel can be configured by Turtle, and costing can be seen in Pricing. This is however only an aesthetic change.
- Releases will not cause a problem for day to day user, however our new feature lists can be enabled on a per user basis depending on whether the new feature is relevant.
- We provide constant communication with our clients so that we can foresee new features and ideas to further help businesses organise and effectively manage their processes. We also have many features in the system which have not been highlighted in this specification which will benefit your business and workings which will be explained in due course.
- Data interfaces can be designed by our technical team, where some interfaces have already been designed. For example invoicing modules, data syncing and update. Having the technical team in house to deal with these requirements greatly speeds up development. Pricing for these will depend on requirements and complexity. Day rates for programmers is given in the pricing section.

Project Management:

Turtle Networks will assign a project manager to deal with the implementation phase. This will be the same person throughout the process.

Invoicing:

Turtle Networks are happy with the standard payment structure of the 20th of the following month.

Pricing:

	Number	Price per calendar month	Fixed price
Enterprise system user license	20	1180	
Each additional user	1	59	
Blocks of 10 users after 20	10	500	
System backup per second		50	
Security certificate		25	
Phone support (per user)	20	400	
Email support		FREE	
On-site training (per day)			450
Custom development (per day)			350
Consultancy for setup (estimated at 2 weeks ad hoc – off site)			4000
Custom interface (colours/header/banner)			3000

All prices are in GBP (£) and exclude VAT at the current rate of 20%

Intrabench's pricing includes maintenance, hardware and upgrades as well as support options. Intrabench is hosted in a Tier level 1 data centre with power redundancy, server fail over and load balancing. Your data is never held on a single server and is replicated at all times. All systems under go regular testing by both Security Metrics and Kaspersky labs (who are also a customer). Intrabench's servers are PCI compliant and the Turtle Networks suite hosts applications from the BBC, Lloyds, Legal and General to financial information and international events companies.

This SaaS model allows you to be secure that your data is safe, secure and costly management hardware upgrades and software upgrade costs are not needed. If you require additional changes to your system we can develop these inhouse and a very modest price, bearing in mind some of your required changes may already be under development by other companies wanting the same features.

Functional Requirement		Primary Function	Secondary Function	Project Team's Priority Level	Supplier Response
1	Supports Help Desk or problem tracking and support	CRM	System	Essential	3
2	Checks for duplicates when creating new records based on user-configurable criteria	CRM	System	Essential	3
3	Provides global change / add / delete for database cleaning	CRM	System	Essential	3
4	Allows import of data from Syteline (i.e customers, addresses, order history etc) and other platforms, (Excel, CSV etc.)	CRM	System	Essential	3
5	Allows full access for multiple remote sites and users	CRM	System	Essential	3
6	Supports import and display of current sales history and quotation data from ERP system either through integration or a semi-automated or regular manual import process	CRM	System	Desirable	2
7	Supports import/display of current accounts information such as 'account on hold' from ERP system either through integration with ERP or semi-automated or regular manual import process	CRM	System	Desirable	3
8	Supports integration with ERP RMA system for repairs/help desk use	CRM	System	Desirable	2
9	Records unlimited addresses per organisation, contacts per address and events per contact	CRM	Contact Management	Essential	3
10	Records contact status, e.g. left, retired	CRM	Contact Management	Essential	3
11	Enables entry of procurement dept / address, work dept / address, etc., and displays relationship between contacts / depts	CRM	Contact Management	Essential	3
12	Supports adding free text notes to an organisation, address or contact and gives clear indication that notes are present	CRM	Contact Management	Essential	3
13	Records interests, mailing requirements & preferences, opt-in / opt-out choices & dates, sources, etc.	CRM	Contact Management	Essential	3
14	Records products purchased/quoted or simply enquired about for targeted communication	CRM	Contact Management	Desirable	3
15	Supports move, merge & purge of contacts / addresses / organisations / event history	CRM	Contact Management	Desirable	3
16	Auto date- and time-stamps notes/events; auto-adds author name	CRM	Contact Management	Essential	3
17	Enables security filtering according to note / event category	CRM	Contact Management	Desirable	3
18	Integrates with word processor, documents can be created / merged directly from system, copy stored against relevant record(s)	CRM	Contact Management	Desirable	3
19	Supports user-defined additional fields / attributes	CRM	Contact Management	Essential	3
20	All contact fields indexable/searchable for look-up/filters/groups	CRM	Contact Management	Desirable	3
21	Supports an Internet knowledge base	CRM	E-Commerce	Desirable	3
22	Supports customer-specific Internet content	CRM	E-Commerce	Desirable	3
23	Optionally downloads web-based enquiry form direct to system and alerts relevant staff	CRM	E-Commerce	Desirable	3
24	Supports prospect entry	CRM	Sales Enquiries	Essential	3
25	Enables creation of new records where full information not available, e.g. email address but no postal address	CRM	Sales Enquiries	Essential	3
26	Distinguishes at organisation and contact level as lead, qualified prospect, has had quote, is customer, etc.	CRM	Sales Enquiries	Essential	3
27	Supports lead origin by channel and specific activity (eg Exhibition – Civilis 2012) & status tracking from initial enquiry through quote to order at company and individual contact level	CRM	Sales Enquiries	Essential	3
28	Events (e.g. correspondence) can be linked to other relevant records, e.g. quote or order	CRM	Sales Enquiries	Desirable	3

29	Supports email list management with bulk emails auto-added to event history on all selected records	CRM	Marketing	Essential	3
30	Integrates with MS Outlook; enables creation of contact record from incoming email	CRM	Marketing	Essential	3
31	Provides calendar / task functionality or integrates with MS Outlook Calendar: auto-adds event record when task/action complete	CRM	Marketing	Desirable	3
32	Supports assignment of sales representative per prospect or customer	CRM	Marketing	Desirable	3
33	Allows creation of rules for auto-assignment of account manager, e.g. by country	CRM	Marketing	Desirable	2
34	Supports lead probability tracking per prospect or customer	CRM	Marketing	Desirable	3
35	Supports tagging individual contacts for mailings, etc. where there is no common data to query by	CRM	Marketing	Essential	3
36	User can create, re-use and share multiple queries / mail groups / filters	CRM	Marketing	Essential	3
37	Provides real time 'view' of all outstanding scheduled activities - calls, quotes, to-do's etc.	CRM	Marketing	Essential	3
38	Supports document attachments or links per contact/customer	CRM	Marketing	Essential	3
39	Supports online enquiry of contact history; all related information clearly accessible without multiple clicks or windows	CRM	Marketing	Essential	3
40	Enables scheduling of next event when individual or bulk history records are written	CRM	Marketing	Desirable	3
41	Provides mail merge facilities to documents, emails or labels, with auto event update in history	CRM	Marketing	Essential	3
42	Intelligently processes address info for DM, e.g. excludes record where address is missing or incomplete & reports excluded records	CRM	Marketing	Desirable	3
43	Manages contacts with external marketing suppliers and supports or can link to purchase orders	CRM	Marketing	Desirable	3
44	Manages press advertising and PR (media details, contacts, publishing deadlines, mail merge)	CRM	Marketing	Desirable	3
45	Provides a suite of standard marketing-related reports	CRM	Reporting	Desirable	3
46	Provides "dashboard" functionality for marketing-related KPIs	CRM	Reporting	Desirable	3
47	Help desk analyses support requests for trends & reports status of requests	CRM	Reporting	Desirable	3
48	Supports the planning and management of field service teams	Service	General	Desirable	3
49	User defined priority codes	Service	Set Up	Desirable	3
50	User defined minimum response time requirements	Service	Set Up	Desirable	3
51	Supports entry of service personnel by company, division or cost centre	Service	Set Up	Desirable	3
52	Help Desk tracks customer and contact	Service	Problem Entry	Essential	3
53	Links to support resources (documents, web pages) by product or by order	Service	Problem Entry	Desirable	3
54	Tracks customer complaints & resolution	Service	Problem Entry	Essential	3
55	Help Desk allows unlimited note entry	Service	Problem Entry	Essential	3
56	Help Desk allows entry of solution or resolution	Service	Problem Entry	Essential	3
57	Help Desk allows routing to responsible parties for resolution	Service	Problem Entry	Essential	3
58	Online query of open cases or reported problems	Service	Reporting	Essential	3
59	Online query of response times	Service	Reporting	Desirable	3
60	Standard report for open problems by category & assigned engineer	Service	Reporting	Essential	3
61	Standard report for total calls and time spent by customer and category	Service	Reporting	Desirable	3