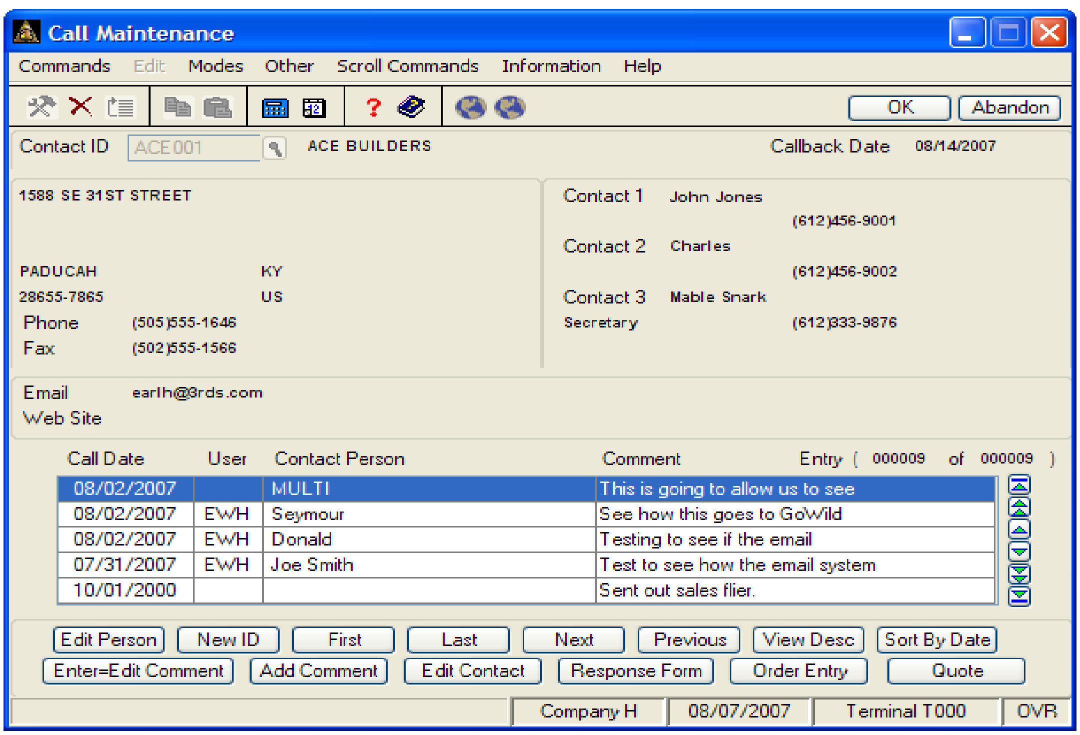
3rd Dimension Systems, Inc.

Contact Relations Manager

CRM is not just for the Sales department any more. Everyone should have access to a place where they can make notes, be reminded of promises, be able to keep track of their important business contacts. But the CRM should go farther, helping to create business transactions quickly and efficiently without having to move somewhere else in their computer. Our CRM is designed to be such a tool – **made for everyone** in the company to work every day with minimum hassle.

CRM is designed to **work seamlessly** with the Open Systems Accounting System, interfacing with many of their existing modules with access from a single screen. CRM does not replace OSAS but gives you, the daily user, access to those modules you use every day so you can get more accomplished every day. The Daily Work, Call Maintenance allows for rapid access to other parts of the program, even allows for creating a Sales Order or Quote in OSAS. If the optional Quantity Quote system is used, you can even generate a Purchase Requisition and manufacturing Work Order all with a single key stroke.



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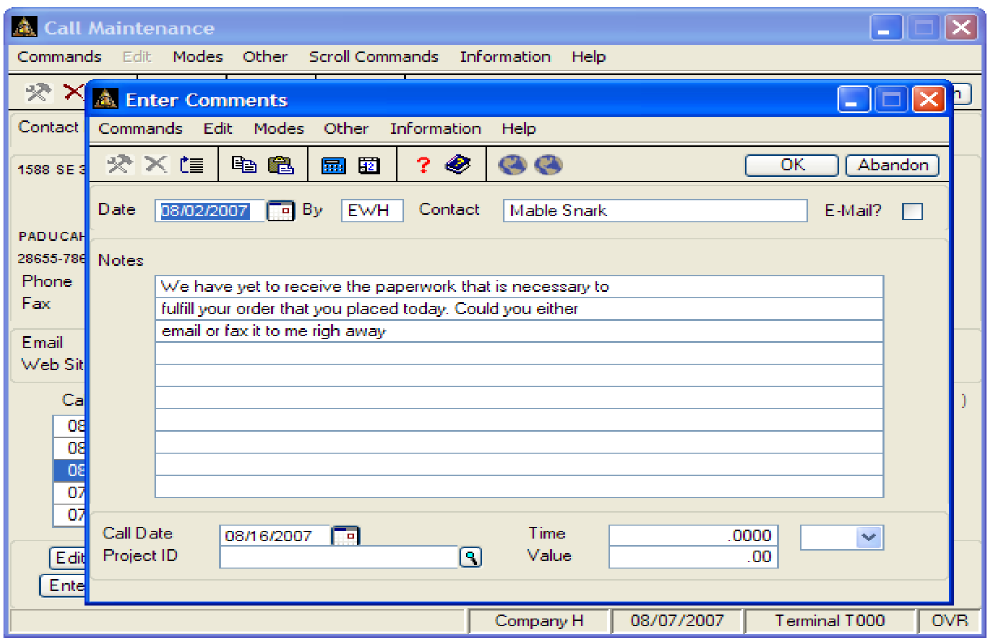
Most work done outside of the company is usually on the phone and this is where the CRM advantage truly shines. The main screen is reflects the important contact information, including three most frequently called persons in the contact company. Although you can access 999 contacts for each company, the screen will reflect any three you want, selected either by frequency of call or in the order you select.

We already have a Customer Phone Directory?

The CRM directory is just a side benefit of our process. The true power lies in being able to **replace all those notes** kept in the spiral notebooks on your desk to remind you of the phone conversations , providing enough information to keep you informed instantly.



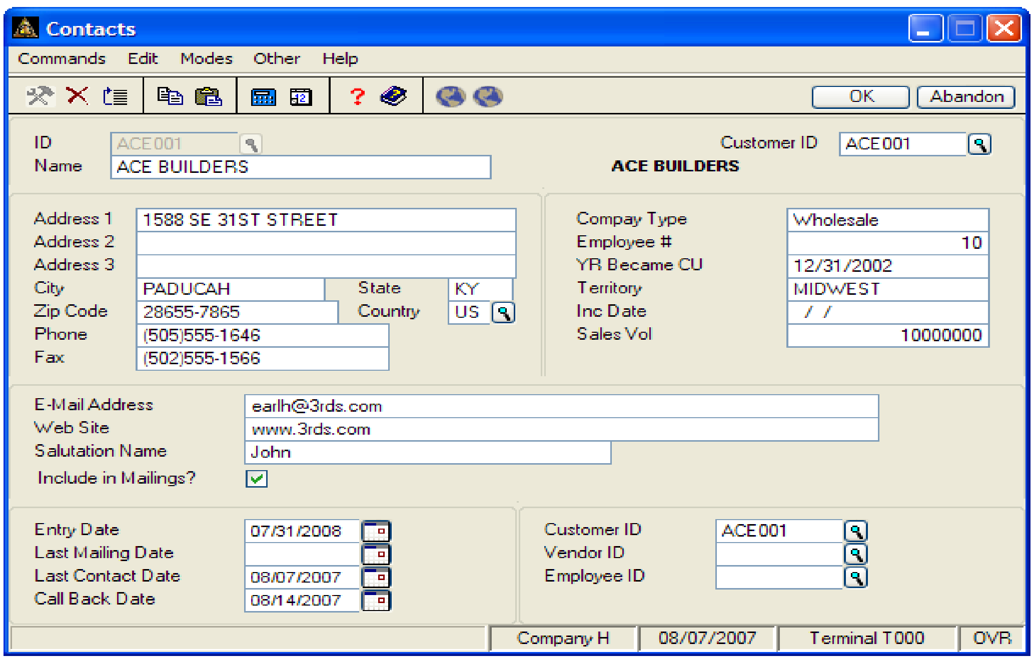
Comment Screen

One key opens the Comment screen and allows a short note pad to jot down the main facts. Furthermore, if you are working with several outside companies or contractors, assigning a Project ID from the included Project Management feature, you have all the notes in a single place. Each comment details the person taking the note, who they talked to, the note itself, a call back date, and the Project ID. If you wish, you can even record the amount of time spent on the call in minutes or hours. **You can even email** this comment to the person noted above by just checking the email box – when you exit, the email goes.

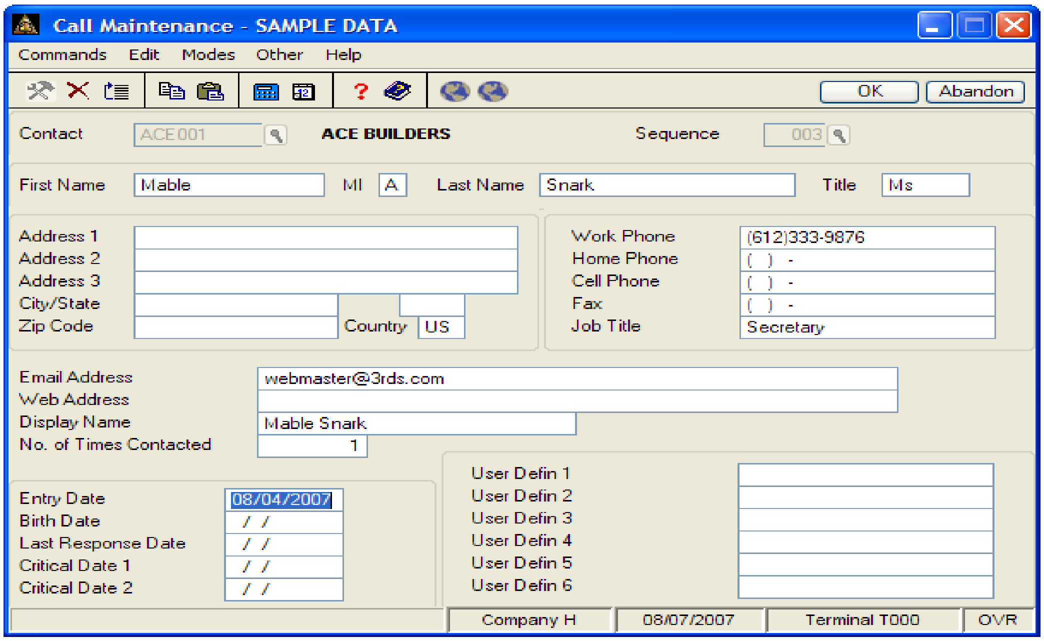
The final advantage is that this "notebook" is **available to everyone** who has access to CRM. No more scrambling around looking for Bob's notes because he is on vacation when your best customer calls to confirm that last conversation with him.

We now have more information on our Contacts than just name, address, telephone number and email address?

Not a problem. CRM is designed to allow **creating your own categories** for your contacts. Besides the big three stakeholder, customers, vendors and employees, CRM provides for six fields you can define yourself to customize CRM to fit your company.



Company Contact Screen

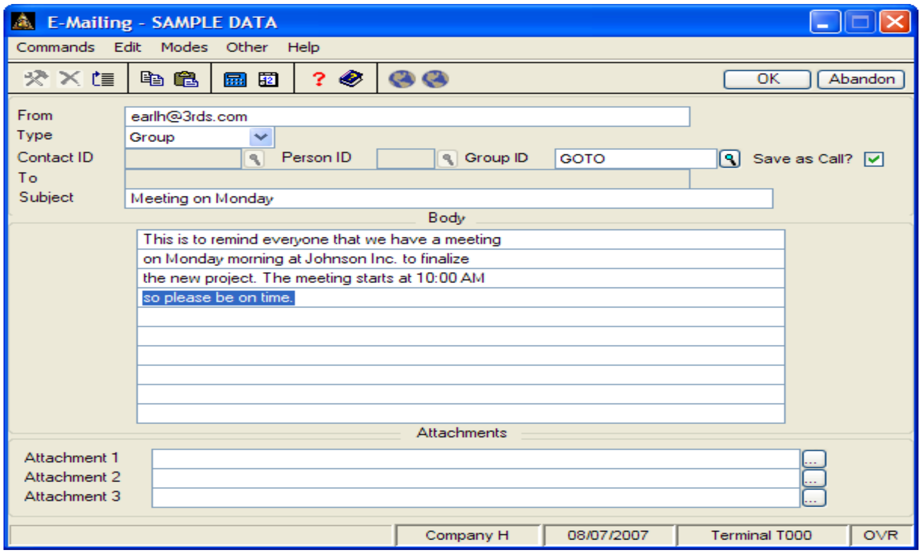


Person Contact Screen

It also has an additional six field for the contact person for a total of twelve added classifications. All this information is available from the Comment screen with a single keystroke.

What if I want to email my Comments to more than one person? Do I have to enter the comment in many times?

CRM realizes that there may be **several people collaborating on a projec**t so it has the capability to create groups. If this is not just a single comment, you can use the direct email screen and invoke the group function.



Group Email Screen

This function will also write the comment into the appropriate Contact file for a permanent record. You can also attach documents with this email.

Does this mean that CRM is going to replace our email?

Definitely not. CRM uses your existing email system to send messages quickly and efficiently. However, it is designed to be a record of important facts and communications from you to your business associates. It is NOT intended to keep everything said or sent back and forth. This is not a data collector but a repository for **important information**.

We currently use a tool in our sales department for prospecting and keeping contact with our customers. Is CRM intended to replace that system? What else will CRM do?

Not necessarily. Many sales department have extensive data needs and track leads, prospects and general information about the sales process. Those systems are designed specifically for sales people. CRM can be used for this function by using the user defined fields, projects, and email capability. If the sales force is internal and needs to track prospects, generate mailing labels, track advertising campaigns and send information to prospects and customers, CRM can be used in that fashion. Beyond that, your sales people will also have access to all the notes and comments that your other people memorialize in the system through their comments.

How do I get started?

To run CRM, the Open Systems Accounting Software Accounts Receivable module is required. (if creating sales orders from CRM is desired, OSAS Sales Order is also required). Once Accounts Receivable is set up, you **install** CRM, **update** the Contacts **from** the **Accounts Receivable** master file (a function of CRM that takes about 15 seconds) and **start** documenting calls in CRM. If you have a prospect list in an outside database, CRM has a user defined **import routine** included in File Maintenance. If additional imports are required, CRM is fully Open Data Base Compliant (ODBC/JDBC).

Specifications:

1. CRM requires Open Systems Accounting Software Resource Manager and Accounts Receivable.
2. OSAS Sales Order is required to create Sales Orders from the Comments Screen.

Please call your Open Systems authorized reseller or 763-502-0400 for further information.

ADDITIONAL 3rd Dimension Systems, Inc. PRODUCTS

Manufacturing Production Management Suite – full MRPII suite

1. **Bills of Manufacturing** – module to create and manage Bills including assemblies, sub assemblies, materials, work centers, external process and by products. Multi-level bills costed in FIFO, LIFO, AVERAGE and Standard cost. Allows for work order back flush at standard usage, full General Ledger and Inventory accountability and Standard Cost maintenance. Engineering Change Orders tracking included. Requires Opens Systems Accounting Inventory module.
2. **Work Order Processing** – module to create and manage shop floor work flow, integrating with MPM: Bill of Manufacturing (required) for creating all paper flow through the shop floor. Allows for actual material, labor and overhead application to specific jobs. Full accounting interface to OSAS General Ledger, tracking each shop floor transaction automatically. Variance reporting on material, labor and overhead variances. Allows for nine different methods of overhead capture. Further integrates with OSAS Sales Order for tracking work orders to sales orders, Payroll for time capture from the shop floor and CRM for integration with Project Management.
3. **Forecast/MRP** – module to perform “what ifs” based upon either projected sales or purchase by sku. MRP interfaces with OSAS Sales Order, Purchase Order , Inventory and MPM Work Order Processing (required) to provide plant and purchasing management and personnel all needs and availability for products either manufactured or purchased. Forecasts can be combined with actual for companies that build to master schedules. Shortages can automatically generate work orders to the shop floor for manufactured assemblies or generate purchase requisitions for purchased materials.
4. **Shop Floor Control** – module to manage personnel on the shop floor, calculating the manpower requirements based on work orders created in the Work Order Processing module. Fully functional software time clock that integrates with OSAS Payroll. Time clock is functional for both hourly and salaried personnel. Bar coding capability is included.

Inventory Requirements Planning – module to perform “what ifs” based upon either projected sales or purchase by SKU. IRP interfaces with OSAS Sales Order, Purchase Order and Inventory to provide purchasing management and personnel all needs and availability for products either sold and purchased. Forecasts can be combined with actual transactions.

Shortages can automatically generate purchase requisitions for in OSAS Purchase Order.