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# **Commence RM**

# **Technical White Paper**

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## Introduction

Commence® RM is the powerful CRM solution that will make your company a more effective sales and service organization. Designed specifically for small to mid-sized companies, Commence RM consists of a comprehensive suite of integrated applications for sales, marketing and customer support. The applications share a single unified database and workflow engine that ensure that all data captured by phone, fax, email or the web is accessible to the people and departments who need it to effectively do their jobs

Commence RM picks up where Contact Managers leave off allowing people who work in teams to share vital information across multiple departments and job functions. The benefits of leveraging this customer information are numerous, including: increased visibility into the sales process, reduced sales cycles, faster response to customer issues, efficient management of internal and external resources, and improved customer satisfaction.

Commence integrates standard Contact Management features such as group calendaring and scheduling, address and phone book, and journals with capabilities traditionally found in higher end products such as:

- Multi-Level Security
- Rapid Customization
- Robust Remote Synchronization
- Network Administration Tools
- Management Of High Transaction Volumes
- Application Development Environment

For more than a decade Commence has earned the reputation as the most robust and customizable product in the industry. In addition to the features listed above, there are five key areas which help differentiate Commence from other products in the CRM category:

- Commence Database Architecture
- Business Automation and Workflow
- Customization
- Integration
- Programming APIs

## Customer Relationship Management (CRM) Features

The Commence Relationship Management applications are designed for companies that want to manage their your accounts at every stage. All activities, opportunities, and history for each account are stored centrally, allowing you to share this information with other employees and departments throughout the company who may need to interact with the account.

### Contact Management

Commence RM incorporates robust contact management and time management capabilities throughout the integrated applications. Standard contact management features include:

- Calendar views graphically display timed events as a daily, weekly or monthly view with To-Do's and a call list.
- Connect people, companies, tasks, notes, To-Do's, documents, and projects to form a web of information that's accessible to other users
- Global search, sorting, filtering, reporting and printing to analyze and manage the account information that has been captured
- Integration with word processing, fax, email, PDA devices, and the web

### Marketing Automation

The Marketing application supports campaign management and automation along with telemarketing support for finding and qualifying leads and automatically sharing these leads with the sales department.

### Sales Automation

The Sales application provides sales people with the tools they need to develop a strategy for efficiently managing the sales process .Pre-defined views allow each sales representative to quickly review their leads and pipeline, add new opportunities, schedule follow-up meetings or activities and provide consistent and accurate forecasts.

### Customer Service & Support

The Service & Support application provides your support staff with a complete customer profile, including support contacts, history of service activity, open tickets, and follow-up activity. Features include

- Track and manage support tickets
- Manage and support maintenance contracts
- Process return material authorizations (RMA's)

- Manage and update company's knowledgebase

## **Ease Of Use**

Commence provides a superior user interface making it extremely easy to use for such a robust product. Its full Windows utilization makes it as intuitive to use as Windows itself. The drag and drop facility allows for fast and easy manipulation of information. The Agent technology which provides automatic execution of specific tasks and actions, virtually eliminates the need for the end user to get involved with extra steps, procedures or processes.

## **End User Productivity**

Commence's workflow features ensures that network users have reliable up-to-date customer information at their workstations. The integration of Sales, Marketing and Customer Service with office automation products such as word processing, fax, e-mail and the Internet provides a totally integrated system for managing and responding to customer needs.

## **Viewing & Reporting**

Data can be viewed and printed in a variety of ways. Users can display selected data and fields in report form, in familiar address book format, graphically as a Gantt Chart, and in day/week/month/year calendar form. Printing in various day planner and organizer formats is supported as well as envelopes, labels, Rolodex, index cards, and much more.

## **Calendar & Scheduling**

Individual users can keep total control of their schedules and calendar events through powerful calendar capabilities. Users graphically view their calendar by the day, week, month or year which include text and color coded busy bars. Users can drag and drop items to schedule or reschedule appointments as well as enhance their productivity using features such as sounding an alarm prior to an appointment. Conflicts can also be identified which inform the user of multiple appointments booked at the same time.

## **Group Calendaring**

This feature allows users to add an appointment and share it with all other workgroup users. Authorized users can write to the shared calendar, as well as add appointments for other people. Group Calendaring displays a matrix of "free" and "booked" times for all required and optional meeting attendees, thereby allowing the meeting coordinator to choose the appropriate time when all participants are free to attend. Once booked, all of the participants will see the appointment on their shared calendars.

## **Word Processing & Faxing**

Document templates with insertable fields for mail merge operations can be generated from within Commence. External word processors such as Microsoft Word, WordPerfect, and Ami Pro, and Fax software such as Delrina WinFax and Eclipse Fax can be automatically loaded and run from Commence. The name, address and other relevant

fields can automatically be inserted into a letter and the letter (or letters for mass mailings) can be printed or Faxed, all from a simple request from Commence. These features are provided through Commence's DDE capabilities, which are also available for adding, modifying and retrieving information in Commence from other Window applications.

## **Electronic Mail**

Electronic Mail (email) enabling allows the user to send and receive email from within Commence. Using its powerful agent technology, Commence can send either a text message or a letter template. Commence can also filter incoming mail and act on the subject matter, the sender, etc. Commence supports MAPI for access to Microsoft mail and VIM for access to cc:mail and Lotus Notes. The Common Mail Standard (CMS) is also supported by Commence.

## **E-Mail Marketing**

Connect for E-Mail enables email marketing campaigns to be automated and leverages the contact information in the Commence database.

Features/benefits TBD

## **Global Search**

Items can be located through global searches by providing selection criteria to Commence. Fuzzy global searching enables the user to find information in their Commence databases even if they're unsure of the word spelling (for example, proper names such as "Jensen" or "Jenson" can be found through fuzzy searches).

## **Multimedia**

Multimedia playback provides support for defining a Commence agent to play multimedia files, including sound or video clips. These may be used as multimedia alarms triggered by Commence agents.

## **Online Help Facility**

Context-sensitive on-line help is available for any dialog box, menu command or error message. Balloon help is available whenever the mouse is passed over a button. The Help - How Do I command leads to quick help on dozens of questions such as How do I: Open a View? Sort items in a View? Print a Letter from Commence? Work with predefined Agents?

## **Windows™ Platform Integration (Win 98/ME & NT/2000/XP/2003)**

Commence RM is compatible with the current Windows operating system versions, including support for the following Windows features:

- 32-Bit Architecture
- Long File Names

- Windows Registry

## **Telephony (TAPI) Support**

Commence can dial telephone numbers via a PC's modem by simply clicking on the phone icon once a company or person's name is selected. Capabilities include international dialing, outside line access, internal PBX extensions, and long distance access. Commence can also initiate a phone log to keep track of relevant information from the phone call. With its TAPI support, Commence can handle incoming and outgoing communications such as a database lookup and screen-pop from the Caller ID passed from TAPI-compliant phone systems.

## **Commence Database Architecture**

Most workgroup products rely on a central database with a single set of files that are accessed by all users. These systems use file and record locking to make sure that two users do not update the same information at the same time. This means that a user must work on some other task until the data they need becomes available. It also means that every user must use the same centrally defined database definitions and must be connected to the LAN to access shared data. Commence allows a group of users to share information as well as to maintain private or local information. Each client can function independently on the network and access the network at anytime to receive updated information. If the server is down, each individual client can continue to operate and receive updates when the server comes back on-line. This is extremely effective for mobile professionals who often require separate databases and dial in periodically to receive updates from the server.

## **Shared & Distributed Network Databases**

The Workgroup version of Commence allows users to share one or more databases with other Commence users and gain the full benefits of network-based information sharing. Commence automatically synchronizes any additions or updates to the database with other authorized users on the network. When one user/client makes a change, all other users will see the change on their systems as well. Users can disconnect from the network and still have their own local copy of the shared database to take with them. When they return and reconnect to the network, all their changes will be synchronized with the other users, and vice-versa. Anyone who needs business information both in the office and on the road gets the best of both worlds with Commence.

Commence Workgroup uses a distributed database architecture where each client in the workgroup uses a local copy of the database that is replicated with the server. The Commence server is responsible for responding to client requests. As the server receives database updates from each client it incorporates those changes into the server database. The server then responds to the client by sending them a synchronization packet with all pending database changes.

Each change sent from a client is stored by the server and then transmitted to every other client in the workgroup. The Commence server optimizes this process by gathering all the changes from the workgroup clients into a single synchronization packet.

## **Scalability**

Some products tend to break down or perform poorly when additional users are added or transaction volumes increase. Commence has been specifically designed to support the needs of growing businesses. During the past decade significant architectural changes have been made to support larger customers by improving synchronization, handling larger transaction volumes, adding additional customization features such as Visual Basic Scripting and full integration to the Internet. Whether your needs call for networking 20 or 250 users, you can feel confident that Commence will support your business.

## **Information Availability**

Whether on a network or standalone, local or remote, the information contained within Commence is readily available to users. Commence's distributed database architecture insures that a local copy of data is always available to access, view and update. Reliable data integrity means the information can always be counted on for accuracy while data file scrambling offers security from unauthorized access.

## **Categories**

A category represents the type of information that is to be stored. For example, if tracking information about people, a contact category is used to store the data entered into Commence.

Categories consist of a series of named fields. For instance, a category used to store contact information may consist of fields such as Name, Address, and Business Phone. When entering data into Commence, it is entered into these fields just as data would be entered onto a paper form or application.

## **Connection Relationships**

Commence supports relationships between data records in the same category or in entirely different categories using its unique Connection feature. This feature supports many-to-many relationships in addition to the traditional one-to-many relationships supported by most CRM products. This capability allows the Commence CRM solution to capture real-world situations such as:

- appointments that have attendees from multiple contacts or companies
- sales opportunities with more than one business partner or vendor involved in the sales process
- and many more real-world scenarios

In addition, the Connection feature offers ease of use by enabling the user to "hyper-link" between related records. Double-clicking an attached record launches a detail form

window displaying the details of the related record. This enables users to quickly access related information without having to switch to a different screen.

## Security

Commence includes several levels of security to ensure that your data is protected and visible only to the appropriate authorized users.

### Database Passwords

Commence provides for passwords that can be assigned to a database to prevent unauthorized access to important data. Commence Workgroup Information Manager provides Login IDs and Passwords for workgroup users, as well as permissions for various record level access.

### Database Encryption

All the information in a Commence database is stored in data files that are scrambled automatically which prevents anyone from reading the data from outside a Commence environment, such as with low-level DOS utilities.

## Permissions

Commence includes permissions that are used to control what information each user is able to view and modify within a Shared Database. The following describes the types of permissions that can be configured.

### User Permissions

User Levels control which users can enroll to a Shared Database, as well as which users are able to change the Shared objects in that database. An object is any one of the following: Category, Connection, Agent, Detail Form, Color Code, Letter Template, Import/Export Template, View, or Desktop.

One of three (3) User Levels may be defined as the default for the Shared Database.

These User Levels are:

- **Author** - can access the Shared Database, and add, edit, and delete shared definitions.
- **User** - can access the Shared Database, but cannot add, edit, and delete shared definitions. Most users will have this user level.
- **None** - cannot access the Shared Database. This will prevent any new users from being registered and enrolled to the shared database. Access must then be granted on a per-user basis via the Permissions dialog box.

Each of these User Levels may be assigned on a per-user basis.

## Category Permissions

Category Permissions determine whether shared items in each category can be viewed, modified, or deleted for each shared category within a Shared Database.

- **Read Permission** - determines whether shared items can be viewed for the selected categories.
- **Write Permission** - determines whether shared items can be added or modified in the selected categories.
- **Delete Permission** - determines whether shared items can be deleted from the selected categories.

For each permission, the following choices determine how items in the selected categories are handled:

- **All** - All items in the category are synchronized to the user.
- **Selective** - A subset of items in the category is synchronized to the user.
- **None** - No items in the category are synchronized to the user. The user receives an empty category.

These permissions can be assigned as a default for all users or on a per-user basis.

**Note:** Category Permissions do not affect access to local data. So granting a user None or Selective category permissions does not prevent a user from adding and modifying local data in that category. Any changes made by a user to non-shared items would not synchronize and would only affect their local Client Database.

## Desktop Permissions

Workgroup administrators have control over what desktops each user is able to access, allowing the administrator to hide functionality the user doesn't need in order to simplify the application and prevent access to information they don't need.

Desktop Permissions allow you to control which shared desktops will synchronize to each user. When setting desktop permissions, only the Read Permissions can be controlled; write and delete permissions do not apply to desktops. Shared desktops can be modified and deleted by users who have been granted Author level access. For each shared desktop within a Shared Database, the following read permissions may be assigned.

- **All** - This translates to read permission to the desktop. The desktop in its entirety will synchronize to the selected user(s).
- **None** - The desktop will not synchronize to the selected user(s).

These permissions can be assigned as a default for all users or on a per-user basis.

## Network Administration Tools

### ComAdmin

Commence includes a specialized program that is used for the administration of Users and Shared Databases. This program, **ComAdmin**, is a stand-alone program which may be run independently of the Server Software.

### Workgroup Expert

The Workgroup Expert is a reporting tool that gathers information about every client in the workgroup, reports on the status of the workgroup, and offers recommendations for resolving any problems detected in the workgroup.

Once you setup the Workgroup Expert, the program will periodically capture snapshots of status information from the Commence server and clients. The data will be analyzed by the Workgroup Expert and a report will automatically be e-mailed to the Commence administrator.

## Commence Server system requirements

The recommended system requirements for the Commence server software is a 1.5 Ghz processor or higher running Microsoft Windows 2000/XP/2003 Server or later. The server system should contain at least 384MB of RAM and have a fast hard disk of at least 1 GB and preferably SCSI (due to its higher performance) for the largest workgroups.

## Database Capacities

The following table indicates the maximum allowed of the listed item.

### Database Capacities

<i>Categories</i>	800
<i>Connections</i>	1000
<i>Views</i>	1000
<i>Color Codes</i>	1000
<i>Import/Export templates</i>	600
<i>Agents</i>	1000
<i>Letter Templates</i>	600
<i>Desktops</i>	100
<i>Tool Bar Pick agents</i>	100

### Desktop Capacities

<i>View Bar views</i>	50
<i>Views menu views</i>	40
<i>Menu Pick agents</i>	16

**Open views** 50

**Category Capacities**

**Items** 500,000

**Detail Forms** 50

**Fields (incl. Name)** 100

**Other Capacities**

**Selections in a combo box** 4000

**Databases** 1000

**Business Automation and Workflow Technology**

Having Commence at your workstation is like having an executive assistant at your side. Commence Workflow Technology automates routine tasks to make your life easy while increasing productivity.

**Automated Business Processes**

Commence's automated business processes enable the automation of an organization's best practices and ensure that leads, prospects, and customers are contacted on a regular basis. Tagging of accounts for follow-up activity such as automated letters, emails or reminders may be sent to specific accounts based on their status.

Each step of a process has a sequence number that provides for the ordering of the steps. You can think of an event's sequence number as being similar to a step number in a set of assembly instructions (as with a child's bicycle). Commence does not process a particular sequential event until all of the events with a lower sequence number have been processed.

For example, here is a sample sequence of events:

Sequence	Event
100	Wait one day, then print letter "Thank you for Inquiry"
110	Wait seven days, then schedule a call back

When Commence executes this process, the "Thank you for Inquiry" letter will be printed one day after the process is started. Then, Commence will begin counting days for the event number 110 as soon as event 100 has been processed.

Commence can trigger actions based on a variety of conditions, such as the existence of a Calendar activity or completed History record or the value of a particular field in the contact record.

## Agents

Agents can be used for simple tasks such as producing follow-up letters to sales prospects or something more difficult such as downloading detailed information from another internal system at mid-night each day. This fully automates many repetitive tasks, taking care of details that could fall between the cracks, providing information when it is needed without even asking.

An agent is composed of one trigger event, up to two optional conditions, and from one to four actions. The simplest agent has a trigger and one action.

## Trigger

An agent “fires”, or performs some action(s), when a particular event occurs in the currently open Commence® database. An event that causes the agent to execute its prescribed action(s) is called a trigger and occurs at a discrete, or single, point in time. The trigger might be the occurrence of a particular time, the saving of an item in a category, the receipt of a DDE message from another Windows application, or some other event that you specify from the list of available triggers.

## Conditions

Conditions specify special circumstances required for the agent to execute its action(s). When an agent’s trigger event occurs, any condition(s) defined for the agent are also examined and the agent’s actions performed only if all the conditions are met. By specifying a condition on the agent, you limit its execution to meet your needs. You might, for example, want an agent to execute once every day at 5:00 AM, but only if there are items in a particular category that have a certain value in a field. If more than one condition is setup, then both conditions must be true before the agent will fire.

## Actions

When an agent’s trigger occurs, it performs from one to four specified **action(s)**. The agent might display a message box, edit an item, launch a Windows™ application, print a letter, etc. For agents with more than one action, it is important to know that an agent’s actions are performed in the order that they appear in the agent’s definition. This is significant because if one action edits the trigger item or the condition items, then a subsequent action will receive the edited items - not the original ones.

Some actions, notably the edit item action, can manipulate data passed from the trigger event or the condition(s). For example, a save item trigger waits for the next time you save an item. When this occurs, the item that tripped the trigger is “remembered” by the agent and can be manipulated by the action(s). This item (or any data passed to an action by a trigger), is called the trigger data.

Conditions can also pass data (**condition data**) to an agent’s actions. While a trigger can pass only one item, conditions can pass data from multiple items, as many as meet the criteria of the condition(s). This allows you to define an agent that will work on multiple items, instead of having to execute the agent repeatedly, once for each item you want to modify.

## Customization Features

Unlike traditional Contact Managers that are often structured and offer only limited customization, every field within Commence can be tailored to meet your requirements. This flexibility has made Commence a favorite among software companies, system integrators, consultants and department heads who need to create tailored solutions to meet their business requirements.

Commence provides a powerful, yet easy to use, development facility which allows for fast prototyping of applications and rapid deployment of production systems. The product is designed specifically with the end user in mind and does not require programming knowledge. The product is therefore extremely beneficial for the development of departmental solutions.

Known as the most customizable product in the industry, Commence works like your business works. Therefore, users do not have to compromise their requirements to support the architectural inefficiencies of lower level Contact Managers or incur the cost of expensive programming and professional services teams to customize higher-end CRM solutions. Every screen and field within Commence may be tailored to address the needs of your growing business.

### Customizable Desktop

The Commence "desktop", like the Windows desktop, gives the user the ability to change the look and feel of their Commence environment. Users can change the size and position of their Commence windows as well as add colors, change fonts, and modify other attributes. The user has the option of saving their favorite window environment either on demand or upon closing a Commence database. Multiple desktops can be created to save different sets of view windows for various uses.

### Application Development Tools

A number of areas within the product may be modified without impacting the key CRM Applications database design. Desktops, views, reports, detail form (layout & labels only), import/export templates, letter templates and preferences may be modified.

The end-user of a Commence RM client database has access to all these customization features, based on their workgroup permission. It is recommended that Commence end-users be configured with the "USER" permission which prevents saving changes to the shared database design.

The Commence Administrator has "AUTHOR" permission and has the ability to change shared database design elements to meet their company's business requirements.

### Report View

Displays fields from one or more categories in a row-column format. Report views can be displayed in a horizontal format that arranges all fields next to each other on a line, or in vertical format which displays the items with one field on top of another.

## Calendar View

Displays names of items by date and time and displays a busy bar that summarizes the entire day. The calendar view can be displayed in several different modes: Image, Day, Two Days, Week, Two Weeks, Month, Six Weeks, Year, and Grid. A calendar view can be used when there is at least one date field and one time field in the category.

## Book View

The book view looks like a familiar address book. It contains pages with alphabetical tabs that allow for easy selection of a tab in order to see the items beginning with that letter.

## Multi-View

A Multi-View window displays one or more primary views and one or more secondary views in a split window format. A multi-view window can be split into two panes, either horizontally or vertically. The primary view can be presented as a detail form or a view.

- Combines multiple views into a single window and also opens faster than a desktop
- The filtering toolbar enables users to easily find and display the information they need
- Allows easy access to related information with a single click.
- Combine Multi-views with desktop to offer different sets of functionality to users, managers, and different departments.
- A built-in wizard makes it easy to setup a multi-view and select how it is displayed and what related information is included.

## Grid View

Displays data in a row/column format. A grid can be used in read-only mode or in update mode. Update mode allows field values to be modified directly without opening a detail form.

- Modern look and feel is based upon common spreadsheet views.
- Supports all of the features and formatting of report views, but enhanced to work in a spreadsheet style view.
- Groups of items can be hidden to display only the subtotals.
- Allows direct manipulation of values from the grid view without having to open a detail form. Allows faster updates and improved usability since the user can “click and update” without having to open a whole new window.

## Document View

View Internet- and intranet-based applications and pages directly on the Commence desktop; creates seamless link between local data and applications and remote applications and content.

Web Companion integrates web-based services with your contact information to enable access to map information, driving directions, company information, and more – using the contact information right from your database. Removes the need to retype contact information into Web service pages – the web companion does it for you automatically.

Incorporates the Microsoft Internet Explorer browser, including all of the extensibility, scripting, and programming support offered on the web, including but not limited to HTML, DHTML, VBScript, JavaScript, Java objects, and ActiveX controls.

## Report Viewer

Displays WYSIWYG reports TBD.

- WYSIWYG report writer and printing
- Modern look and feel similar to other report writers
- Supports all of the features and formatting of report views, but enhanced to work in a spreadsheet style view.

## Detail Forms

A detail form is used to enter data into a category. Detail forms are also used to view particular items in a category. Detail Forms can be divided into multiple "pages" also known as tabs which make the form easier to use.

## Customizing Views

Once a view has been started or opened, it can be customized as needed by selecting the **Tools -> Customize -> Design View** command . Each of the view types has its own set of options which may be customized. These options fall into the following general categories:

- **DISPLAY** - customizes the overall appearance and layout of the view being designed
- **FIELDS** - identifies which fields (from within the selected category) are to be included in the view being designed
- **COLORS** - customizes how colors are used within a view, and identifies which color code (if any) is to be assigned to the view being designed
- **FONTS** - customizes the fonts to be used within the view being designed

## Custom Multi-Views

Multi-Views allow you to group related views into one window frame. You decide which views work together. Use the View Linking wizard to dynamically link the data in one or more secondary views to the one primary view. Then run the multi-view wizard to create the view. Once you create a multi-view, the related views open simultaneously using the window arrangement you saved.

Multi-views are ideal for situations where you have many secondary views all View Linked to one or more primary views. The top or left window in a multi-view is known as the primary window and displays the set of primary views that you selected in the wizard. All linked views are then arranged on individual tabs in the secondary window.

## Sorting Views

The order in which the items appear in a view is called the sort order. Calendar views always sort items by date and time, while Book views always sort items alphabetically by the Name field. The sort order can be set for items in Report, Grid, and Gantt views. In Commence up to four sort fields can be specified. For example, items in a To-Dos list can be sorted by the due date, and then by the assigned priority.

## Filtering Views

A filter creates a subset of the items based on field values and displays only those items in the view. For example, a view can be filtered to show only those appointments scheduled for today, or only those To-Dos that are not completed. Filters can also be on a connection to another category. For instance, a filter can be set to list all People employed by Widgets, Inc. Finally, up to four filter criteria can be combined to get a set of items. For example, a filter can be created to display all To-Dos that are due today, are Priority 1, and are not completed.

## View Linking

View Linking is a special type of filter that links two open views by a date or date range. If a day planner calendar is the primary view, the secondary view will only show items that occur on that day. If the display mode of the calendar is changed to display the current month, then the items in the secondary view will update to show any items that occur within the current month.

View Linking can also be driven by the highlighted item, or whichever item is selected in the primary view. This relationship becomes evident as you scroll through the list of items in the primary view. The secondary view content refreshes automatically to display only the items connected to the highlighted item in the primary view.

View Linking establishes a dependency between the primary view and any secondary views. Secondary linked views are dependent on the data in the primary view and require that the primary view be open.

## Integration Features

Commence includes many features used for integration with desktop productivity applications, such as Microsoft Office, with other applications or database software to automatically exchange information, or with the Internet or your internal intranet.

### Outlook Integration

#### Logging Outlook E-Mail

E-mail integration with Outlook has been streamlined to simplify the storing of email messages to a Commence database, to improve the display of stored email messages, and to provide a means for capturing and managing attachments within Commence. Users can store and view their Outlook E-mail in Commence. Supported features include:

- One-button logging of email messages into the Commence database
- Stores original message in rich-text or HTML format along with attachments
- Works with incoming and outgoing email

#### Synchronizing with Outlook Contacts and Calendar

The synchronization feature provides the ability to share information between a Commence database and Microsoft Outlook® 98, Outlook 2000 or later versions. Information is shared by two-way synchronization between Commence and Outlook using the **Tools -> Outlook Sync** menu command. This synchronization copies information added or modified in Commence into Outlook, and then copies information from Outlook and adds or modifies the items in Commence.

This feature enables Commence users to share Contacts and Calendar information resulting in a comprehensive calendar and address book in both applications. In addition to sharing information, Microsoft Outlook's group scheduling features can be accessed directly from within Commence using the **Tools -> Schedule Meeting** menu command.

#### Scheduling Meetings in Outlook

The **Tools -> Schedule Meeting** command in Commence can be linked directly with Outlook. This allows users to schedule group meetings using the scheduling feature in Outlook.

#### Using the Commence Address Book

In some cases, it may be preferable to simply lookup email addresses in Commence without actually synchronizing all your Commence data to Outlook. Configuring the Microsoft Exchange Address Book preference creates an external Commence Address Book that can be accessed from within Outlook.

### Word Processor Integration

Commence includes macros for integration with common word processor software. These macros enable letters and mail merges to be created automatically, using information from the Commence database.

## **Palm PDA Integration**

The Commence® Palm Pilot™ Link provides two-way information synchronization between a Commence database and a Palm handheld. The synchronization process copies information added or modified in the Commence database and stores it in the Palm handheld. It also copies information from the Palm handheld and adds or modifies the items in the Commence database. The Commence Palm Pilot Link works with both Commence Personal and Workgroup to synchronize information with the built in Palm handheld applications:

- Address Book
- Date Book
- Memo Pad
- To Do List

## **Internet/Intranet Integration**

### **Document (HTML) View**

- View Internet- and intranet-based applications and pages directly on the Commence desktop; creates seamless link between local data and applications and remote applications and content.
- Web Companion integrates web-based services with your contact information to enable access to map information, driving directions, company information, and more – using the contact information right from your database. Removes the need to retype contact information into Web service pages – the web companion does it for you automatically.
- Incorporates the Microsoft Internet Explorer browser, including all of the extensibility, scripting, and programming support offered on the web, including but not limited to HTML, DHTML, VBScript, JavaScript, Java objects, and ActiveX controls.

### **Web Companion**

The Web Companion allows your Commence database to interact directly with the Internet. A Commence document view is used to display Web-based information related to the data in Commence. Online forms that would typically require manual data entry can instantly capture data from the highlighted contact in Commence.

The Web Companion simplifies common tasks performed on the Web, including:

- Finding information (such as maps and local weather) on the web for the selected contact in Commence
- Searching the Web for news, images, audio and video related to the selected contact in Commence
- Locating businesses in the same area as the selected contact in Commence

### **FTP Synchronization**

Commence can be configured to use File Transfer Protocol (FTP) commands to send and receive updated information for the Shared Database over the Internet. This capability is used with remote users and can be implemented over a standard dial-up connection to the Internet.

### **Web Site Integration**

Many companies claim to be Internet enabled, but do nothing more than provide a vehicle to access someone's Web site. Commence has the ability to integrate your internal business process with the Internet by publishing views and forms from existing applications on the Web. Internal routing of customer information via workflow provides total integration between your internal staff and external customers, vendors, suppliers and remote employees. (Requires Allure Product)

### **Exchanging Data via OLE DB/ODBC**

As an OLE DB client, Commence can directly exchange data with other databases that support OLE DB/ODBC. Compatible databases include Oracle, SQL Server, and Microsoft Access.

Templates that access OLE DB/ODBC data files can be created allowing Commence to write data directly into an ODBC database. All templates are bi-directional, so the same template can be used to import data from an ODBC database into Commence.

An SQL query can optionally be specified while defining the template to select the records and columns from the ODBC data source. When importing data, the query is used to define which columns are available for mapping to Commence fields and also what set of records in the ODBC database to consider. When exporting data from Commence, the query simply defines which columns are available for mapping to Commence fields.

### **WinFax Phonebook support**

Commence can be configured as a WinFax phonebook will allow faxes to be sent easily to people stored in a Commence database. This eliminates the need to re-enter any data in WinFax.

## **Programming Features**

Commence offers several Application Programming Interfaces (APIs) to enable integration between external software and utilities and the Commence user interface and database.

### **Dynamic Data Exchange (DDE) API**

Commence includes a DDE API that can be used to control the Commence user interface, such as opening views and forms or triggering Agents, and can read and write information to the Commence database.

Dynamic Data Exchange (DDE) is a form of communication that allows Windows applications to communicate with each other. This communication is referred to as a DDE

conversation. The application which initiates the conversation is known as the client. The application responding to the client is known as the server. The client can request data from the server, send data to the server, and perform any other tasks which are allowed by the server. Commence can function as both a client and a server, which means Commence can initiate a DDE conversation with any DDE capable application, including itself.

## **Visual Basic Scripting**

Commence includes integration with the Visual Basic Scripting (VBScript) engine to enable scripts that will guide the user through data entry for a detail form. Field validation criteria can be defined so that newly-entered data is checked immediately.

Commence permits VBScript code to be written for each form within a database. This enables such operations as setting default values, filling in fields, and navigating within the form, as well as performing validation checks before an item is saved.

VBScript code can be written to handle various events, such as the loading of a form, entering or leaving tabs, pressing the Save button, etc.

While processing these events, VBScript code can read and write field values, move the cursor to different fields and/or tabs, display messages, abort a requested save, and interact with the Commence Database API or other Automation servers (such as Microsoft Office).

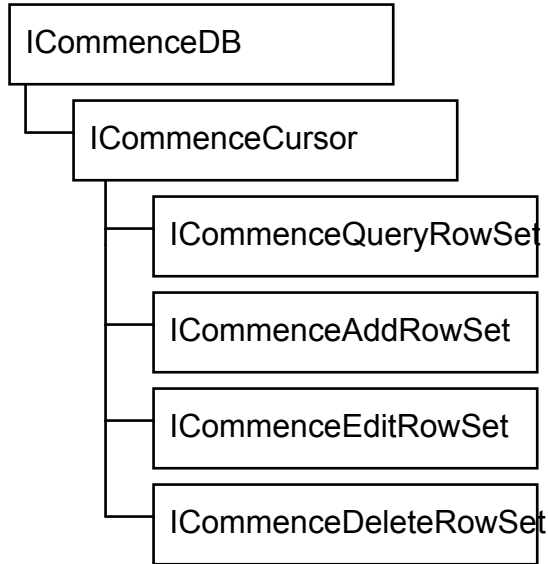
## **Commence Database API**

Commence uses Microsoft's Automation technology (formerly OLE Automation) to seamlessly integrate Commence with other applications that support Automation. Commence can act as an Automation server, whereby external applications can access data from the Commence database or store data into Commence.

This standards based API (Application Programming Interface) makes Commence data more accessible than ever before. Commence can communicate with any Automation-enabled application, such as the entire complement of Microsoft Office products.

The Database API allows customer IT departments, value-added resellers, and 3<sup>rd</sup> party developers to create add-ons in the programming language of their choice, such as Visual Basic®, Visual C++, VBScript, Delphi™, Power Builder, Visual FoxPro, and Visual Basic for Applications (i.e. VBA, the scripting language used by Microsoft Office).

The Commence database interface is based on a cursor/row set model that is used by many modern database engines (e.g. the Microsoft Jet engine). Our object model is called Commence.DB and is organized as follows:



Conceptually, the cursor is a pointer to data extracted from the database that meets specified criteria. The cursor has attributes such as a filter, sort criteria and a column set; it is also scrollable (you can move both forwards and backwards through the data). The cursor does not include the actual data (field values), instead it allows you to instantiate row sets for data access.

## Summary

Commence® RM provides an easy to implement, comprehensive “out of the box” Customer Relationship Management (CRM) solution for small and mid-market companies, while recognizing that companies of all sizes require a solution that can be tailored to their unique business requirements. Commence RM’s customization and integration features enable these changes without requiring extensive and expensive programming efforts in order to give the lowest “total cost of ownership (operation)” of any CRM solution.