



P1 / THE SITUATION



P2 / THE SOLUTION



P3 / THE PLAN OF ACTION



P4 / BENEFITS

ANALYTIKZ CRM/ ERP System Development

OBJECTIVE

Develop a cost effective, comprehensive and sustainable enterprise planning software to assist Client X in its waste oil collection services.

SITUATION

- CLIENT X collects waste cooking oil from a variety of sources (called clients / restaurants). CLIENT X has a fleet of vehicles to collect this oil and must eventually look at cost-effective routing.
- When collecting receptacles are filled clients call CLIENT X and a "collection" is scheduled.
- Collections can either be called-in or scheduled regularly.
- Clients are paid for the oil collected (or not). Payments made must be tracked / invoiced.
- Date, Volume, Amounts paid and client and other pertinent oil collection data should be recorded.
- CLIENT X already has a history of oil collections and a client base that will need to be imported into the ERP solution.
- The ERP solution should be able to schedule and manage oil collections, manage Customer Relations, track and monitor oil collection services and customer accounts as well as sales campaigns and acquisition of new clients.

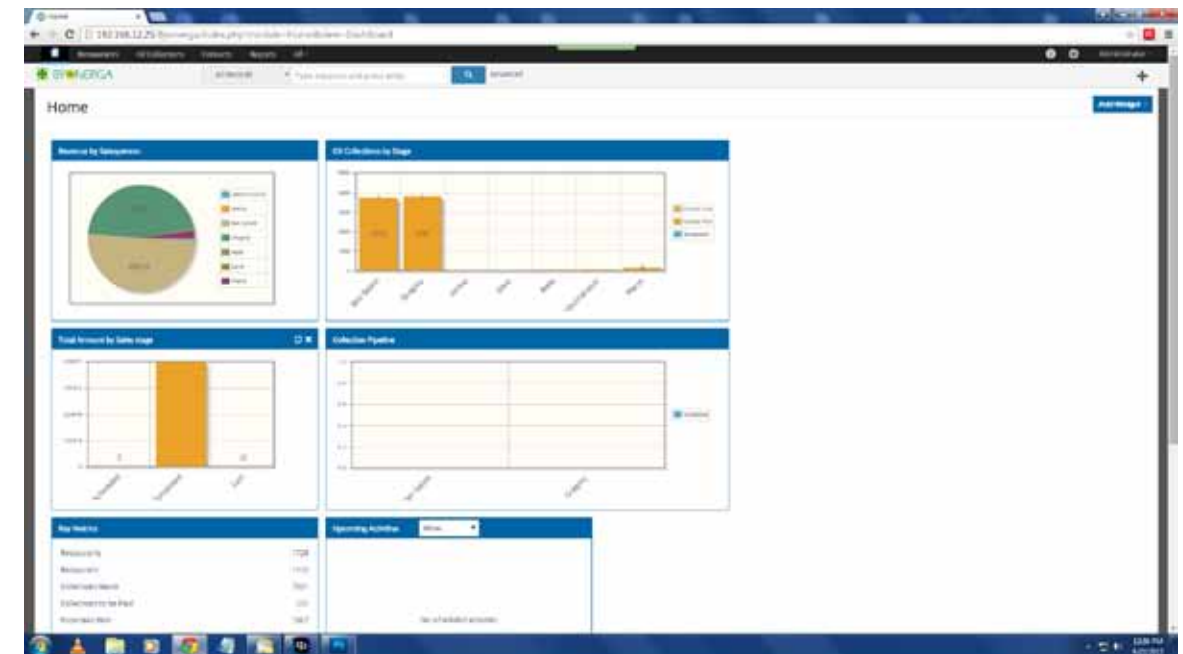
- The ERP should also be able to provide consolidated and filtered reporting on enterprise activity (customers, oil collections, assets, financials, inventory).
- The ERP should also manage employee records and performance and allow for personalized access and restrictive access depending on roles assigned (e.g. manager, driver, salesperson, etc.).
- CLIENT X would like to explore the possibility of voicemail to e-mail integration and other mobile and remote applications for their employees and clients.
- CLIENT X has also expressed an interest in automating their processes as much as possible. The ERP will allow for customer portal access for self-scheduling and sign-up, as well as integrate with VOIP interactive telephony services (for automatic telephone scheduling) should they be available.



ANALYTIKZ

IS001

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ABOUT US:

ANALYTIKZ CONSULTING uses the power of Analytics and Information Technology to liberate your business potential. Our Business Consultants and our staff of IT engineers will work with you to determine the solution you need.

Our strengths come from leveraging the proper technology and understanding to meet our clients' business needs. Whether it's a game theory decision model you need, IT support or development, or how to meet demand or smoothen your supply chain, we are here to walk you through the process.

WE OFFER:

IT Support & Development

Intelligence Systems

Data Mining & Statistical Data Analyses

Forecasting, and Predictive Modeling

Strategic Business Consulting

Process Engineering

Game Theory and Decision Modeling

Sales Force Automation

Lead Management
Lead Conversion Mapping
Account & Contact Management
Opportunity Management
Quote Generation

Customer Support & Service

Trouble Tickets
Knowledge Base
Customer Self Service
Online Knowledge Base
Support Statistics

Security Management

User Management
Profiles
Roles
Organization-level Sharing Model
Organization-level Field Access

Marketing Automation

Online Lead Forms
Mailing Lists
E-mail Templates
Mail Merge Templates
Mass E-mail

Inventory Management

Products Catalog
Price Books
Vendors List
Purchase Orders
Sales Orders
Invoices

Activity Management

Tasks, Meetings, and Calls
Recurring Events
Group/Shared Calendar
Activity History
E-mail Notifications
Notes

Productivity Tools & Add-ons

Incoming & Outgoing E-mail Integration
Outlook Plug-in
Office Plug-in
Thunderbird Extension
Customer Portal
RSS Feeds

Reports & Dashboards

Key Metrics
Customizable Reports
20 Pre-built Reports
Dashboards for Sales Force
Report Folders

Product Customization

Custom Fields
Pick Lists
Custom List Views
Automation
Drag & Drop Modules

For a full list of features see www.analytikz.com

“ The Analytikz ERP minimal system comes with the following features which we configure and customize to your specific business needs... ”

Plan of Action

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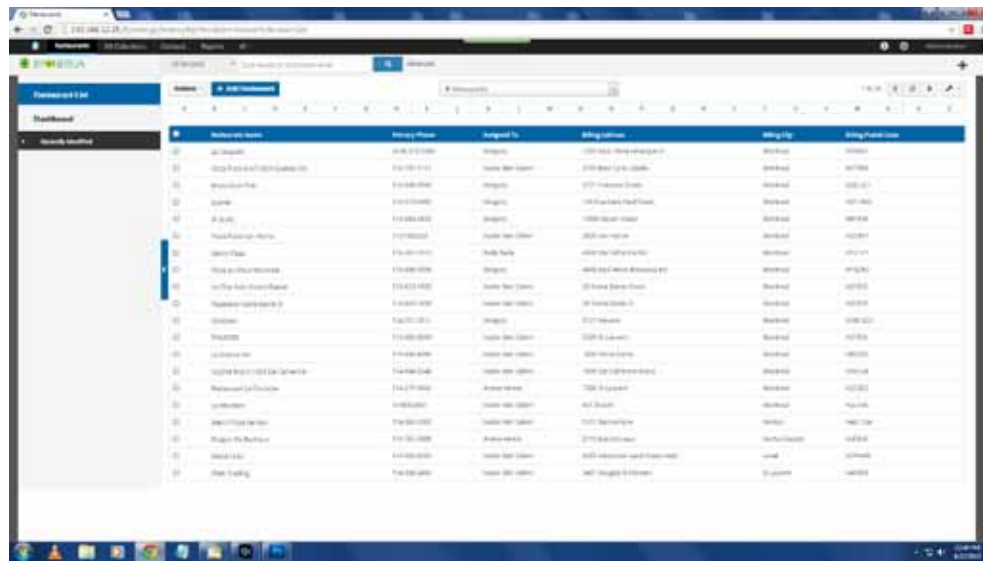
ERP SOLUTION – Minimal Set-up

Analytikz proposes the Analytikz ERP Solution to handle the needs of CLIENT X. Analytikz ERP will manage all client records and oil collections, as well as employees, inventory and prospecting. It can also handle accounting, purchasing, logistics and manufacturing (transformation) should the need arise.

The Analytikz ERP will have a LAMP (Linux-Apache-MySQL-Php) architecture and will be accessible via web browser from the internal LAN network (or via the internet – as required). It is responsive in design and can be viewed from a desktop or from a mobile device.

The Analytikz ERP is a complete scalable solution able to handle ALL the operations of a business. Most features will be precluded from this deployment as deemed either unnecessary or undesirable. CLIENT X management should discuss any feature or integration they do not see here with Analytikz for the possibility of inclusion within the scope of this implementation.

The Analytikz ERP will also be able to integrate with many 3rd party applications (e.g. Quickbooks or Sage software for accounting; any database driven engine – existing CRMs, etc; any existing CMS – for document and site management, e.g. Joomla, Wordpress, Drupal, etc.)



“ Better manage your sales, operations and employees with built-in tools. ”

For Managing Sales

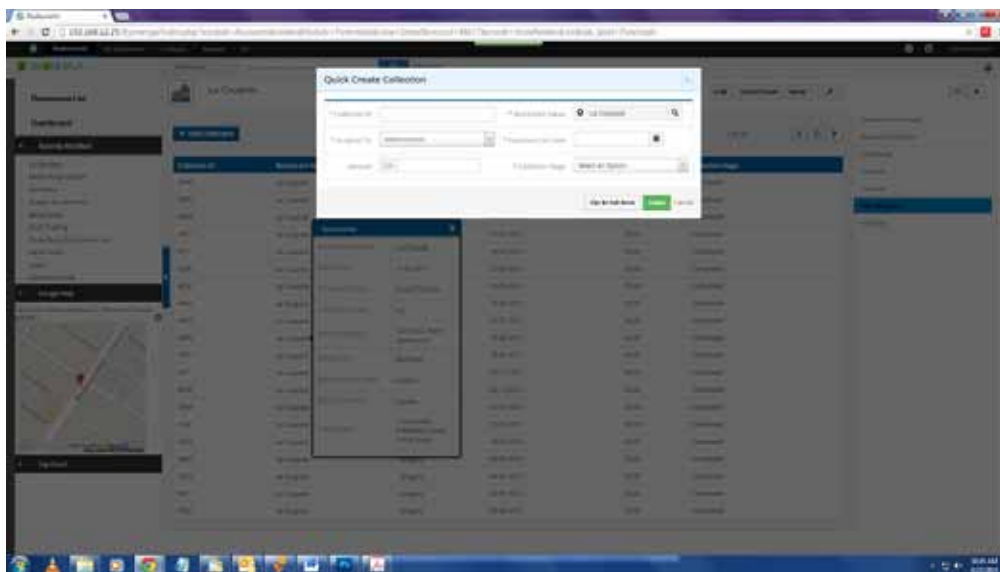
- CRM
- Point of Sale
- Quote Builder
- Mass Mailing
- Survey
- Events
- Community Builder
- Lead Automation
- Live Chat

For Managing Operations

- Project Management
- Billing
- Accounting
- Warehouse Management
- Manufacturing
- Procurement

For Managing Employees

- Employees Directory
- Enterprise Social Network
- Recruitment
- Expenses
- Appraisals
- Fleet
- Human Resources Software



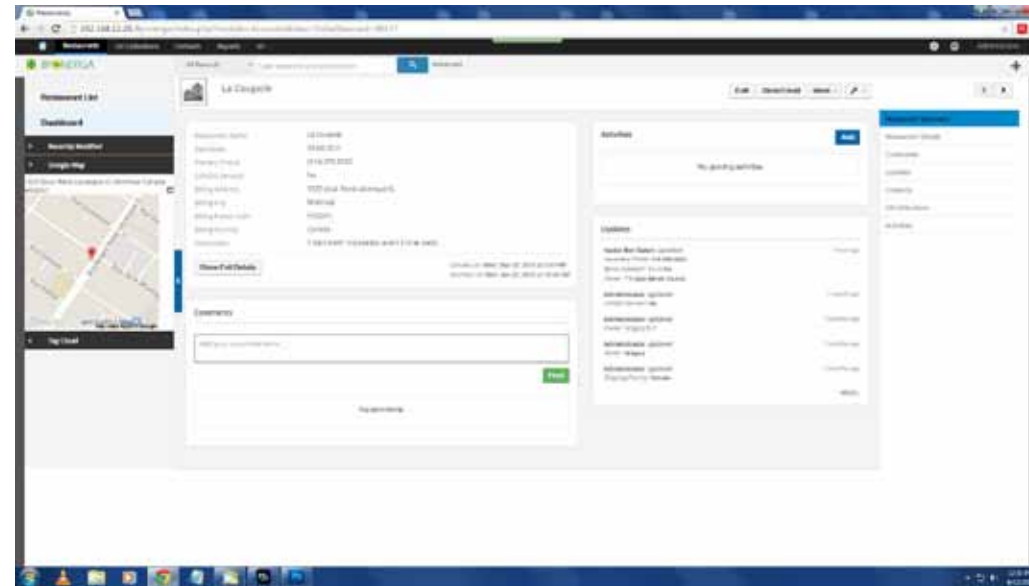
Advance Innovation while controlling costs

Some Features of ANALYTIKZ ERP/CRM

- Lead management
- Account & contact management
- Customer support & service
- Campaign management
- Mass mailing

- Inventory management
- Integrated calendar
- Activity & notification management
- Email integration and extensions
- Performance reporting
- Product customization

- Security management
- Opportunity prioritization
- Automatic lead capture
- FAQ creation
- Teams and access control
- Integrations



ERP/CRM BENEFITS

The real strength of an Analytikz CRM / ERP is in the benefits it delivers to your business.

- ★ Organize leads, accounts & contacts and prioritize opportunities with Sales Force automation tools.
- ★ Manage marketing campaigns and generate leads with automated processes.
- ★ Import leads and contacts from anywhere.
- ★ Track customer purchase and other account histories down to uniquely identifiable items and services.
- ★ Build a knowledge base accessible to customers through the customer portal, eliminating repeat customer questions and increasing the speed of customer service.
- ★ Integrate document management systems and workflows allow for automatic notices and the attachment of files to project tasks.
- ★ THE LIST GOES ON...

Can your company keep up? The true cost of innovation and its effect on your bottom line

BUSINESS BENEFITS

CUSTOMER / CLIENT DATABASE

Manage your restaurant customers. Keep track of customer history, oil collections history, payments history, contacts, collections notes, whether a barrel or other container is installed, etc. See your customer in all its particulars and history with a click.

SERVICE SCHEDULING / MANAGEMENT

- Schedule oil collections automatically (periodically, or by quantities expected) or manually.
- Input quantities collected and amounts paid at customer site or at end of day, from a workstation or mobile device.
- Generate daily collection schedules and reports.
- Generate forms, invoicing, payment, restaurant collection histories automatically and at customer site.
- Keep track of collection data: date, time, driver/agent, quantities, payments effected, terms and conditions, contact information and notes.

INVENTORY MANAGEMENT & SUPPLY CHAIN

Keep track of total quantities collected and of warehousing. Gain oversight over collection volumes, material stocks, and company assets (bins, barrels, etc), including their locations, movements, transactions, and more. Increase your ROI by reducing or eliminating idle inventory and shortages.

CUSTOMER PORTALS

Allow customers to sign on and request or schedule an oil collection on their account via your website or portal. Allow customers to keep track of their accounts / oil volumes / payments, etc.

ANALYTICS AND REPORTING

Instantly see how your business is performing in different sectors. Run analyses on historical oil collections by quantities, dates, locations and other criteria. Filter by any database field. Sort on screen. Clickable entries. User interface for report modifications and creation. Automatic exports into Excel, csv or xls. Leverage company data to make better-informed business decisions. Use in-depth reports to monitor the health of any stage of your company's operations (financials, collections, sales performance, etc.)

CLIENT RELATIONSHIP MANAGER

(MINIMAL - INCLUDED) Manage all your business's contacts: whether they be confirmed customers, prospects, partners, vendors etc: keep track of them and their history with your company in one place. (OPTIONAL) E-mail integration and automation, collaborative agendas, lead automation, marketing campaigns. Manage your sales funnel through a centralized interface. Create and track marketing campaigns. Attract leads via newsletters and campaigns, follow-up on clicks, inquiries, phone calls and e-mails.

CRM AND VOIP TELEPHONE INTEGRATION. (REQUIRES IP -PBX INSTALLATION)

Streamline your customer service process, increase customer retention, decrease customer acquisition costs, accelerate your team's performance and leverage customer data to increase the effectiveness of marketing campaigns. Allow users to schedule a collection on the system via the phone. Notify drivers / managers of oil collections and voicemails via sms, e-mail, etc.

EMPLOYEE MANAGEMENT

Keep track of hours, expenses and performance via employee. Provide them tools to improve on their performance. Grant secure access to a centralized data entry portal to minimize errors and even capture real-time analytics if you need to.

SALES AND LEAD DEVELOPMENT

Prospect for leads, create marketing campaigns, keep track of conversions and sales / promotion performance by salesperson, geographical location, time, campaign, etc.

FREE INTER-OFFICE CALLS W/ MULTI-BRANCH PABX

Every Analytikz PBX has the ability to connect to one or more Analytikz PBXs. This means that its very easy to connect multiple offices and route calls between them. Add a reliable Internet Connection at each end and you can start making free calls between offices even if they are located interstate or internationally.

SCALABILITY

Analytikz technology scales from small offices with 6-7 phones, to large scale enterprises with thousands of phones spread across the globe. You can scale up an Analytikz PBX by adding additional PBXs or upsizing the existing server.

ACCOUNTING

Full double verification accounting system. Including customized templating for invoicing, quotes, payments etc and 3rd party integration with Quickbooks. Electronic invoicing, automatic invoicing, online payment and automated follow-ups. Manage ledgers, cash flow, payables & receivables, and assets - all integrated with your business processes.

PROJECT MANAGEMENT

Ideal for support services, helpdesk, bug tracker, etc. Track customer complaints/issues. Resolve and follow-up on 'tickets'. Kanban View, Gantt Charts, Calendars. Chat in real time, share documents, integrate your emails