

Redlien Account Executive 1.5 Executive Whitepaper Overview.

Redlien Account Executive is a full-featured sales and contact relationship management application for Mac OS X that combines powerful activity and opportunity tracking features with an intuitive and quick user interface. For more information on the various elements of Redlien Account Executive discussed below, please refer to the application documentation available at www.redlien.com/download.html.

Key Features of Redlien Account Executive

Redlien Account Executive has many features which users will appreciate when using it in a day-to-day situation. Some of these features are outlined in this document below.

- Contact data management
- Contact activities tracking
- Customizable and flexible contact management architecture
- Contact activity and opportunity reporting
- Intuitive and Quick Access User Interface
- Accessible Back-end Data Architecture

Contact data management

Redlien Account Executive allows users to store and manage more than 70 unique data elements for each contact entered into the system. These data elements range from the basic name and company fields common in all address books to more in-depth activity tracking, organization-specific fields and other business-related data fields. In addition, many of these data fields are customizable to suit the users needs and can be reported on independently or in-conjunction with other data elements.

Contact activities tracking

Redlien Account Executive was designed primarily as a tool for sales and account professionals to track, manage and report on activities with their contacts. To accomplish this, Redlien Account Executive provides tools to manage the following activity types:

- Phone Calls
- Scheduled Events
- Meeting Notes
- Tasks
- Attachments
- Basic Notes
- Opportunities
- Sending Emails
- Received Emails

Each activity type maintains its own data store and is represented to the user as a unique activity type with its own appropriate and relevant data options. All activity elements can be reported on independently so that the user can perform the necessary actions based on those activities.

Phone Calls

Tracks: Call subject, call result, next action required, next follow up date, call note, contact initiated phone call or not.

Options: Timing of phone call, dialing of contact using built-in modem.

Scheduled Events

Tracks: Event subject, event note, event type, event status, event start and end date, repeating and alarming options (only available via iCal synchronization), event location, event URL

Options: iCal publishing of events.

Meeting Notes

Tracks: Meeting subject, meeting start and end date, meeting evaluation, meeting goals accomplished rating, participants, agenda items, discussion items, tasks, attachments, free style notes

Options: Link to existing scheduled events, printable / exportable meeting summary

Tasks

Tracks: Task name, priority, due date, % complete, complete or not, task note.

Options: Tasks with due dates are available for display on the internal Redlien Account Executive calendar.

Attachments

Tracks: Local file or URL address, descriptive name, attachment note.

Options: Copy local attachment file to central location, display image file in preview, drag and drop attachment onto contact attachment listing.

Basic Notes

Tracks: Subject and note field

Options: Print note field.

Opportunities

Tracks: Opportunity name, type, stage with probability, estimated close date, status, won / lost / suspended reasons, multiple invoices with multiple products in invoice, auto-invoice numbering, invoice note, shipping and handling costs, tax costs

Options: Display opportunity % of quota (if set), weighted value and profit, commission amount, export of invoice data.

Sending Emails

Tracks: To, Cc, Bcc headers, attachments, subject and email body.

Options: Emails may be sent via Redlien Account Executive's internal emailer, Apple Mail and Microsoft Entourage. Email templates may also be applied.

Received Emails

Tracks: From, to Cc, subject, date, email body and attachments.

Options: View email in preview pane or separate email viewer. Received attachments may be attached to contact or system file library, print email, view email in Apple Mail (if email file local on machine)

Customizable and flexible contact management architecture

Redlien Account Executive provides to users extraordinary means of working with, and understanding their contact database. Redlien Account Executive accomplishes through various methods.

- User definable templates for call scripts
- User definable templates for emails
- User definable drop-down data lists
- System-wide product catalog
- System-wide file library
- Customizable Contact Window
- Custom list views
- Browse-by-Anything

User definable templates for call scripts

Redlien Account Executive provides users the ability to create custom call scripts, sometimes referred to as “Cold call scripts”. This feature lets users who are in a high-volume sales environment create custom call scripts that are based on contact data for use when dialing a sales prospect. Almost all contact data fields are available for the template. In addition, the Call Script window is a special window that floats on top of all other windows in the system, displaying the appropriate default Call Script (if set) when a contact is selected. The Default Call Script (set in the Contact Window) can also be tracked, allowing for users to cross-reference call script viability versus contact opportunity status. Templates created in this system are available to all users.

User definable templates for emails

Similar to the Call Scripts template system, Redlien Account Executive provides users the ability to generate custom email templates for use when sending emails out. Template usage may also be tracked for contact opportunity status cross-reference. Templates created in this system are available to all users.

User definable drop-down data lists

Redlien Account Executive employs the use of drop-down lists throughout many of its data collection areas, including the Contact Window, Contact Opportunities window and other sections, to ensure consistency of data collection. This helps prevent users from accidentally entering in data that’s the same, but spelled or referred to differently than what is desired for reporting reasons. Redlien Account Executive allows users to edit these drop-down lists to match their needs more appropriately. By default, Redlien Account Executive provides a set of generic options for these drop-down lists. Changes made to these user lists are available to all users.

System-wide product catalog

Redlien Account Executive provides users with a means of creating custom products and services that can be used in conjunction with creating Contact Opportunities. Custom products may contain both fixed-cost and variable-cost items, and allow for multiple price points. Products and services created in this system are available to all users.

System-wide file library

Redlien Account Executive’s File Library feature allows users to select local files or URL’s to add to the systems general database. Files or URL’s entered into this system are available to all users, and may be selected for email attachments.

Customizable Contact Window

One of the more powerful features of Redlien Account Executive is its new (in version 1.5) customizable Contact Window. Using this feature, a user may edit almost all data labels displayed on the Contact Window and have those changes reflected back throughout the rest of the system, including custom list views, user definable drop-down lists and more. In addition, the Contact Window maintains 10 user definable text fields and 1 user definable image field. The user-definable fields allow users to change the text display format from one of eight different formats (Basic, Phone, Date, Number (#.##), Number (#), Percentage, Currency, Email and URL). Both the contact image and user definable image field accept dropped JPG images. Changes made to the Contact Window are available to all users.

Custom List Views

The Redlien Account Executive Main Window Contacts listing headers and the data it displays are customizable to user preference with this feature. Users may create multiple custom list views from which they may view particular data elements. For instance, a user can create a custom list view that shows all sales activity, including number of phone calls, weighted revenue, and the next follow-up date of a contact in addition to a more generic list view that display just name and company. Once created, a user can then switch between multiple views easily. Please note that there is a limit of 64 elements that may be displayed in a custom list view header. Custom list views created are available only to the user creating them.

Browse-by-Anything

To accommodate the different searching and filtering needs of its users, Redlien Account Executive allows users to view their data by one of the many contact data elements available in the Main Window Contacts listing. When a user has selected a browse element (for instance, Company), only contacts, and their activities with the appropriate field data will be displayed throughout the rest of the non-Dashboard Main Window. Combined with Custom List Views, Preview Pane and Info Pane, a user can quickly view almost all of the 80+ data elements of a contact in one glance, as opposed to opening several different sections or windows to find the same data.

Contact activity and opportunity reporting

Redlien Account Executive provides several formal and informal means of reporting on users progress with their contact database. Informal means relate to using custom list views and browse features to create unique and exportable data sets. More formal reporting mechanisms include the Dashboard and User Activity Report.

Dashboard.

The Redlien Account Executive Dashboard is a user-customizable graphical display of various contact-related activity and opportunity data. The dashboard provides 42 unique components from which users may select to display a real-time assessment of their contact database's progress. These components provide graphical views of contact opportunity data, quota and commission data, contact activities overviews and more. This display is customizable by the user to include as many or as few components as they wish. Changes made to this section are specific to the user.

User Activity Report.

The user activity report provides a more in-depth data chart of a users activity, including contact management, activities and opportunity progress. Reports generated from this feature include data generated throughout the system, either by individual or multiple users to allow for management comparison. Non-administrative users only have access to their own report. User activity report data generated with this feature may be exported or printed.

Intuitive and Quick Access User Interface

Redlien Account Executive strives to provide a user interface that is as simple and quick to use as possible. Understanding its core audience of users, Redlien Account Executive provides a simple contact-oriented data structure that is easily understood, viewed and manipulated with by those users with a minimum of formal training required. Redlien Account Executive also provides keyboard access to nearly all the elements of its user interface allowing experienced users to work with Redlien Account Executive in an extremely quick fashion. Icons and field tag descriptions are designed for simplicity and quick user insight while powerful features are provided in an approachable and easy to understand manner. Where possible, Redlien Account Executive also uses basic Mac OS X and other popular application's usage conventions, allowing for an even further reduction of user training required.

Accessible Back-end Data Architecture

Redlien Account Executive utilizes the OpenBase SQL database system from OpenBase International for its data warehouse needs. OpenBase SQL is a powerful SQL based database that is cross platform and integrates with many existing application development environments. Redlien Account Executive provides open access to this back-end data store so that application developers may integrate Redlien Account Executive throughout the enterprise as necessary.