



# CARMEL VISION



Our Vision is your *edge*



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## II. Executive Summary

[Carmel Vision](#) is a Toronto based Microsoft Gold certified partner & a Cisco developer software development company focused on delivering a powerful management infrastructure designed to collect, search, and archive all content, contact and communication activities that take place in a typical office.

Our flagship product, [InfoFlo](#) is a central management system specifically designed to combat one of the biggest technical challenges facing any professional organization, how to efficiently organize, archive, filter and search the vital information that bombards our desktops on a daily basis.

The revolutionary InfoFlo infrastructure solves this problem by allowing all office activities to coexist together under one umbrella, making all critical information readily available at your fingertips from a **single application with a single click**. These activities include email, bulk email, contact management, PBX-telephone, fax, scan, document management, document collaboration, VoIP, calendar, notes, voice recordings and more.

The InfoFlo system is language independent (can be easily translated into any language) and the support, maintenance and installation of the system is over the Web, giving an organization great value with low maintenance cost. Configuration and installation is very simple with very little training required. The system is available for the **Enterprise, SMB and SOHO markets**.

InfoFlo is by far the best value, easiest to use and has been perfectly designed to meet all office needs. Its innovative technology infrastructure delivers features and benefits not found in another office software application.

Our sister company, Carmel Interactive, has developed [nanoPBX](#) (hardware appliance), a simple, yet powerful **VoIP & PSTN** based PBX that complements our InfoFlo technology creating the complete office management solution. nanoPBX is a full-featured IP and PSTN based PBX telephone system, fully integrated with InfoFlo technology and other SIP PBX systems.

Carmel Vision's software products are not market specific and as such are open to the global market. They can be used by all enterprises from a single user to a large company. We foresee our software being sold into all aspects of the market place whether it is the medical, business, professional or personal market.

### **III. General Company Description**

The Carmel Vision team is highly experienced in both software development and customer service. We understand and listen to all of our customers' needs. Our software development team is well educated, rigorously trained, and highly qualified. Carmel Vision's management team has over 30 years experience in the computer industry.

Carmel Vision's knowledge in software development, networking and system integration dates back to 1990 when we started our first company, Carmel Graphic Systems Inc., a java-based software development company offering products to the graphic arts market. It was sold to Creo in May of 2000, a major Canadian printing press company based in Vancouver. Creo was subsequently sold to the Eastman Kodak Co. who is still selling our Carmel Graphics software solutions around the world.

In order to maintain customer adaptability, we have created a special software development solution design capable of tailoring to any of our customers' needs.

Carmel Vision's software products are not market specific and as such are open to the global market. They can be used by all enterprises from a single user to a large company. We foresee our software being sold into all aspects of the market place whether it be the business, professional, medical or personal market.

Carmel Vision was incorporated in January of 2002. We are located in Toronto, Ontario.

## IV. Technology

Our infrastructure, which was developed using **Microsoft .NET & C#**, allows all office activities to coexist together **under one umbrella** making them all searchable while linking them to a multi dimensional contact management system. With **a single click** a user can view a full history of all communication activities associated with a person, a company, a category, or a shared project. These activities may include:

- ✓ Email & Email Broadcasting
- ✓ Faxes
- ✓ Telephone conversations (nanoPBX integration)
- ✓ VoIPs
- ✓ Voice Recordings
- ✓ Calendar/Appointment Events
- ✓ Notes
- ✓ Documents and Files
- ✓ Scans
- ✓ Business Cards
- ✓ Map Addresses
- ✓ And many more!

### Client/Server:

- Client is completely firewall transparent using HTTP allowing connection to the server from anywhere in the world, without the need of a VPN.
- All information is stored on the server, giving user the most updated information on whatever client they are signed in from
- InfoFlo is a thick application ensuring maximum security & permitting compatibility with external USB devices. The communication channel between the server and client is 512-bit encrypted.

**No other product provides a simple, high level approach to the complex and highly time consuming tasks of *managing, linking, archiving, collecting and indexing enormous amounts of data*.** All of this is accomplished using a new revolutionary approach for data storage and retrieval making all critical information instantly available **at your fingertips**.

## V. Products

### 1) InfoFlo:

- a. For a single user all the way up to the SMB market
- b. Can support from **1 to 250 concurrent users**
- c. Client can be installed on any number of computers and seamlessly connect to the server **whether located inside or outside the firewall**, from any location
- d. A collection of stand-alone clients wishing to share data on a **single server**
- e. The Infoflo configuration is very easy to set-up, **ONE click** installation.

### 2) nanoPBX (optional integration with InfoFlo):

- a. A full featured PBX operating as a standard plug & play **network appliance** for the SMB, Residential & SOHO markets.
- b. nanoPBX will enhance your customers office telephony infrastructure, reduce monthly bills and improve productivity by keeping you linked through either a PSTN or VoIP connection. **It is fully integrated with any InfoFlo product**, offering a total office solution for your customers with a minimum investment risk!

## VI. InfoFlo and nanoPBX Benefits

### InfoFlo benefits:

1. InfoFlo is a full office communication unit and it includes the following features:
  - a. Email
  - b. Bulk Email
  - c. PBX IP/SIP telephone integration using nanoPBX, with integrated Soft phone and hard phone
  - d. Fax
  - e. Map and GPS, integration with Google and MS Earth
  - f. Document **Management** with built in check-in/out, version control, version history and revert to previous version with permission control capabilities supporting any file format, including PDF, doc and excel
  - g. **Collaboration** of InfoFlo entities and all communication activities associated with those entities including Document Management capabilities, creating a complete collaboration solution
  - h. Document Scanning, supporting any type of TWAIN scanner on the market
  - i. Business card scanning with OCR
  - j. Notes
  - k. Integration with Skype
  - l. Voice recording
  - m. Converting to PDF
  - n. Local depot for offline activities, remote depot for secure desktop activities
  - o. Seamless integration with any IMAP/POP3 email account including free providers such as Gmail, Yahoo and Hotmail for sending and receiving emails.
  - p. Complete backup and restore of the entire system, including all files stored
  - q. Import/Export from Outlook of all emails, contacts, companies and categories and automatic Calendar Email SYNC between InfoFlo and Outlook (**essential for smart-phone users**)
  - r. Import/Export any CSV formatted outlook file including Gmail, Yahoo, Hotmail and any other solution/email account supporting CSV export.
  - s. Client-Server architecture with built-in connector layer allowing you to connect from anywhere in the world and take your office with you
2. Any action you need to take is only one click away.
3. 4-Dimensional contact management list with the following entities:

- A. Companies
- B. Contacts
- C. Jobs
- D. Categories

4. All types of communication activities coming in/out of an office is automatically indexed and archived into virtual baskets.
5. Different file types (TIFF, PDF, ect) can be archived under any of the 4-Dimensional contact management list entities into virtual baskets.
6. Job/Project entities are easily formed, drag and drop, to organize people into workgroups allowing all communications (see above #1) in any group/team to be in one place and available only to the assigned participant.
7. Job entity are formed by drag and drop, bringing together customers/companies, contacts, and teams, all job/project information can be assign to Job entity.
8. Customers using any browser can send/receive jobs over the web to the appropriate job virtual basket.
9. Jobs can be assigned to the Microsoft Outlook Calendar for scheduling purposes.
10. Customer Service representatives can organize all their communication with their customers.
11. Sales people can communicate with management on different jobs where ever they are, inside or outside of the office.
12. Sales and marketing activities with bulk email and personalization is available.
13. Management can be done securely from inside or outside the office, and can have a full view of all shop activities, using permissions management.
14. InfoFlo can be integrated with any 3<sup>rd</sup> party application to expand business opportunity.

## **nanoPBX Benefits:**

**1. nanoPBX** comes complete with the kind of sophisticated features from which users of big business PBX phone systems take for granted. They include:

- a. All in ONE Network appliance PBX Includes VoIP, Gateway & PSTN
- b. Supports SIP protocol and all SIP based VoIP phone hardware and soft phones
- c. Two analogue PSTN incoming and outgoing lines connect to existing analogue Telco lines
- d. Unlimited extensions with personal voice mailboxes
- e. All extensions can make VoIP & PSTN calls
- f. 10 hours of local voicemail storage
- g. Music on hold
- h. Dial By Name
- i. Automated call attendant and Welcome Message
- j. Call forwarding
- k. Call conference
- l. Call accounting
- m. Follow Me feature
- n. Easily configured through HTML interface
- o. Advanced configuration with dialing and routing scripts
- p. Upgradeable firmware
- q. Linux Server infrastructure
- r. Database with remote one touch dialing

**2. Scalability:** In addition to the above features and functionality, nanoPBX can expand to meet SMB & Enterprise market demands. nanoPBX contains 2 lines with 50 extensions, if more are needed, nanoPBX can easily be configured to add more extensions and PSTN lines by cascading additional units, offering a simple upgrade path and astonishing modularity capabilities.

## VII. InfoFlo and nanoPBX Integration

A PBX is a powerful cost-effective device that can handle all voice calls for internal extensions and external PSTN lines. Integrating the InfoFlo Software solution with our nanoPBX Asterisk based PBX can **dramatically increase user productivity** and provide a **significant competitive advantage** by offering a unified front-end solution that can handle all office communication needs.

The integration between InfoFlo and any Asterisk based PBX includes both front-end and back-end.

The features are listed below:

### **Embedded Softphone**

The InfoFlo client has an embedded softphone, providing a unified front-end solution for users. This integration avoids any extra installation and learning curve to install a third-party softphone application. It also reduces the number of potential issues users encounter using a separate softphone application.

### **Automatic Configuration**

The InfoFlo client is configured with office extensions, allowing the built-in softphone to automatically configure according to the logged in user. Users only need to select which extension they want to use with the client and enter the extension password. The rest of the PBX server settings are shielded away from the user. This integration greatly reduces the tedious technical work to configure the softphone client.

### **Caller ID to Contact**

When a user receives an incoming call the InfoFlo Client quickly uses the caller ID to locate the caller in the contact database and immediately displays all the information within the softphone window. The softphone window will also contain a link to this contact so that the user can quickly pull out all the previous emails, documents, faxes, notes, calendar events etc. with the contact. This integration can greatly improve customer service friendliness and improve customer relations.

### **Click-To-Call**

Users can click on any contact or company entity within the InfoFlo Client and make a quick call, without memorizing and entering the number manually. This integration speeds up and eases the dialing effort.

## **Call History**

PBXs today do not have a well designed and easily accessible call history database. However, with InfoFlo the server pulls out all call records from the PBX in real time and stores them into the InfoFlo Database. Call records are linked and archived to known contacts stored in InfoFlo while unknown call records appear in the system's activity list which can later be populated into the database. This helps users store all call records for retention and reference purposes. Users can also add comments to all call records.

## **Voicemail**

Users can access voicemails directly from within the InfoFlo client with a single-click. Voicemails are copied from the PBX to the InfoFlo Database, and compressed into Windows Media Audio (WMA) files for archiving. This does not affect accessing voicemail from the user's extension, but offers an additional graphical interface to easily access and playback voicemails or send them out as attachment if desired. As with all other communication activities, voicemails are automatically linked to known contacts or can be populated into the database.

## **Call Recording**

Although PBXs today support call recording, it takes a large amount of disk space and offers no easy method for users to efficiently access these call recordings. InfoFlo's client softphone interface allows user to perform a single click to start or stop recording for ongoing phone calls. Voice files are compressed into WMA and sent to the InfoFlo Database and automatically linked and archived to known contacts stored in InfoFlo, while all unknown call records appear in the system's activity list which can later be populated into the database. User can easily access these files, playback or send them out as attachment if desired.

## **Moderator Board (not implemented in current InfoFlo Ver.)**

This interface is designed for company phone moderators. The moderator can see the status of all extensions, all incoming calls, and drag-and-drop incoming calls to any extension. The interface is also integrated with the InfoFlo Database to quickly show any related information of external contact.

## VIII. Marketing Information

### **Value Proposition:**

InfoFlo's revolutionary approach for data storage and retrieval allows all critical information to be instantly available at your fingertips. It is by far the best value, easiest to use and has been perfectly designed to meet all office needs. Its innovative technology infrastructure delivers features normally found only in large enterprise systems costing many times more.

**InfoFlo is the sophisticated affordable solution for the next generation paperless office, with pricing catered to the needs of such businesses, most especially with the current financial turmoil businesses are faced with today. Tired of an office straddled with the inefficiencies of paper and separate applications to manage your office? Give InfoFlo a try!**

### **List of Competitors:**

Despite a collection of products from multiple vendors such as Oracle, IBM-Lotus, EMC, Microsoft & Open Text, with each offering addressing a subset of user requirements, no single solution currently enables the complete **Collection, Organization, Archiving** and Linking of all communications under one umbrella.

### **Competitive Landscape, Differentiation from Key Competitors:**

The market currently offers a variety of uni-dimensional contact, content and communication tools, each covering a very small percentage of the feature set provided by our technology. Furthermore, each competitive product is tied to its own proprietary contact list and database. Therefore, a user would need to purchase a collection of these competing products each managing a different subset of communication activities. This type of configuration creates unnecessary data duplication, thereby prohibiting a single holistic view of the user's contact and communication content data. With competitive products, when the user subsequently requires a complete list or view of all communication exchanged between him/her and a third party, a search must be conducted against each database. Upon completion of the independent database searches, the user must then manually assemble the results which usually lead to incomplete information.

Carmel Vision believes that none of today's products provide for the complete Collection, Organization, Archiving of all communications linked under a single umbrella. The InfoFlo infrastructure ensures that activity collection baskets for emails, faxes, documents, voice mail, telephone calls, voice dictations, notes, meetings and appointments are linked to an entity (Category, Company, Contact, Team & Project) and are automatically updated and always contain every single piece of in/out communication that has been sent/received by the user.

## IX. Customer Testimonials

"This is just a note to thank you and your associates for your help and assistance in setting up my Workgroup InfoFlo. While I use just a small amount of this software's potential, it is saving me hours of unpleasant actual filing. *No more labels, file folders and hours of manual filing, just a little computer and scanning time and everything is done. With a single click I can now view all information, including all scans that are linked to my contacts and shared projects.* Your service is unsurpassed and all our contacts were enjoyable and your sense of humour was appreciated. If you ever want me to talk to a potential client, just have them call me."

**Fred Davis – President**  
**FHD INC - 5 user billing company**  
**California, USA**

"For years I had been trying different contact managers to try and find the one that would provide enough functionality to allow me to convert my real estate office into a paperless virtual office which would allow all of our agents to work remotely without needing to maintain a huge central expensive office. *InfoFlo was the first and only affordable product that we found that would provide the functionality that I was looking for.*

However once I got into applying InfoFlo and started to explore its potential I was blown away by its versatility which opened up even more possibilities. Plus the PBX functionalities provides us with a complete PBX feature set, fully integrated into InfoFlo. What sealed the deal for us was their support staff, I can't recall when we have worked with any company that had such a dedicated, personable and patient customer service department. From the very beginning I felt more like a friend than a customer. The support's staff knowledge of their product and their willingness to help has been truly a wonderful experience. "

**Steve Fabrykiewicz – President**  
**Real Estate 21 – 5 person real estate firm**  
**New York, USA**

"We've been using the system for about 18 months now. *It has done wonders for integrating our respective pieces of information that we run in a mobile office.* In addition, InfoFlo brings together all the software requirements we need to operate our office into a single desktop environment, which is far more harmonious than having respective bits of scattered software to manage different types of information. On the whole: fantastic! It has pushed productivity through the roof!"

**Andrew Benjamin – President**  
**Macklin Holdings Ltd – 10 user property management firm**  
**Wellington, NZ**

## X. Future Development

### **Hosted InfoFlo (SaaS Model):**

The InfoFlo infrastructure can support a distributable SaaS environment. Distributable meaning multiple instances of InfoFlo services runs on a cluster of machines (instead of just 1) which all share the workload. If one server is too busy to complete a task it passes work off to a less busy server. These are the kind of technical issues which come up when making a service available to a large user base. Distributability is already hooked into the code, which means we took it into consideration at design time, however it is not implemented yet. In non-technical terms, it means that we can create a Hosted InfoFlo solution in which thousands of users can connect to a single server.

### **Advanced New InfoFlo Infrastructure:**

We are currently working on a new infrastructure where all entities, including categories, companies and contacts can all be shared. This will include complete permission control capabilities where the administrator can create groups and each group will have different permission controlled capabilities. This will include the option to share an entity, such as a contact, and then based on the permission controls of that user; they can select which other users will be able to share the contact and whether they can also view all emails, faxes, documents, voice recordings and notes specifically associated with a contact. As well, based on the permission controls of the user, shared users will be able to edit all shared entities, including categories, contacts, companies and job/subjects.

Another example is the ability to share categories. This would mean that if a user creates a category such as “Customers” and has sub-categories such as “potential”, “signed” and “final”. When the user adds contacts, companies and job/subjects entities to this category, the user will have the ability to share this category including all the contacts, companies and job/subjects entities that are part of this category. All users will then have the ability to edit the classification of an entity, such as contact or company from “potential” to “signed”, all other users will see these changes in the shared category as well.

This functionality is labeled below as **Sharing & Role Based security** and is at no extra cost.

**Sharing & Role Based security:** (no charge doing this anyway for new InfoFlo infrastructure)

1. Share contacts.
2. Assign per user access privileges.

**Future Components:**

Our goal is to remain developers. We will always be developing more and more components to InfoFlo. As is the case now, most of this development will be based on dealer input so that our dealers can better sell to their specific market. Since we own the InfoFlo code and do not outsource anything, we can develop 99% of whatever our developers need.

## **XI. Server Hardware Requirements**

### **Server Hardware Requirements for more than 1 user:**

#### **2-9 concurrent users**

- 2.2 GHz
- 1 GB RAM
- 2 x 120 GB Software-RAID
- Windows XP/Vista/SBS/Server 2003 Standard

#### **10-24 concurrent users**

- 2 x 2.4 GHz
- 2 GB RAM
- 2 x 250 GB Software-RAID
- Windows XP/Vista/SBS/ Server 2003 Standard

#### **25-49 concurrent users**

- 2 x 2.6 GHz
- 4 GB RAM
- 2 x 500 GB Software-RAID
- Windows Server 2003 Standard

#### **50-74 concurrent users**

- 4 x 2.1 GHz
- 4 GB RAM
- 2 x 750 GB Hardware-RAID
- Windows Server 2003 Standard

#### **75 – 99 concurrent users**

- 4 x 2.3 GHz
- 8 GB RAM
- 2 x 1000 GB Hardware-RAID
- Windows Server 2003 Standard

#### **100 – 150 concurrent users**

- 2 x Opteron 2352
- 2 x 4 x 2.1 GHz
- 16 GB RAM
- 2 x 1500 GB Hardware-RAID
- Windows Server 2003 Standard