



# CARMEL VISION



**Our vision is your edge**

**Microsoft**  
GOLD CERTIFIED  
Partner



Technology  
Developer  
Partner

## WHY USE AN INTEGRATED CRM OFFICE SOLUTION?

In today's information technology era, businesses all over the world are inundated with an endless stream of information. Digital Files, hard copy documents and pictures and videos are constantly coming in or out of an office. Collecting, organizing, archiving and retrieving such information is becoming a common challenge for businesses, especially, when critical and immediate decisions have to be made.

## CAN YOU AFFORD NOT TO?

By using today's patchwork approach to systems, including the purchasing of disparate solutions, unnecessarily increases cost, complexity and risk. It leads to redundant content and to a lack of connections among systems and departments, not to mention the hours typically wasted in trying to find and retrieve information.

In addition, companies today expect their current systems to do more with less; however, many systems cannot handle these demands as they only offer subsets of a fully integrated CRM office management solution. Although businesses may be reluctant in allocating funds for such technology, companies must examine their current systems to ensure that they have what it takes to operate efficiently and remain competitive.

**Bottom Line:** Most companies need to access at least one form of activity associated with an integrated CRM office solution; whether it be as a scanning solution, document management or archiving solution, document collaboration solution, contact management solution, project management solution and email management solution in addition to other specific point activities required to get their job done effectively and effortlessly.

## ACTIVITIES TYPICALLY INCLUDED?

A complete CRM office management solution SHOULD allow all office activities to coexist together, in a single application. With **a single click** users should be able to view a full history of all their communication correspondences. These correspondences include:

- ✓ Contact Management
- ✓ Email & Bulk Email
- ✓ Scanned Documents
- ✓ Documents
- ✓ Collaborations
- ✓ Reports
- ✓ Custom Fields
- ✓ Telephony (including PBX and VoIP) VoIP
- ✓ Calendar
- ✓ Notes
- ✓ Map Directional Service
- ✓ Index and Search
- ✓ Tasks

## THE ULTIMATE, INTEGRATED CRM OFFICE MANAGEMENT SOLUTION HAS ARRIVED

Carmel Vision is a Toronto based Microsoft Gold certified partner 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 the only fully integrated CRM office management system specifically designed to combat one of the biggest technical challenges facing any professional organization, how to efficiently organize, archive, filter and retrieve 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, scanning, PBX-telephone, reporting, document management, tasks, collaboration, calendar sharing, project management, map directional service, Skype integration, Outlook integration 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. The system is available for the **SMB 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.

Strengths
<ul style="list-style-type: none"><li>• Integrated CRM office management software allowing all activities to coexist in one application</li><li>• Very compelling pricing</li><li>• Software solution designed for every vertical market</li><li>• Strong technical and business experience among the Carmel Vision management team</li><li>• Customer can host own local servers securing all confidential information</li></ul>

## Product Features:

### **Contact Management**

The software should be made up of contacts, companies, projects and categories entities. All these entities should be linked so that at any point a user can view the relationship of a contact to any companies, categories or projects added. As well, all activities, such as emails, documents, calendar events and notes should be associated with each entity, creating an efficient integrated contact management solution.

### **Email Management**

The software should automatically track all incoming and outgoing emails without affecting existing Outlook functionality. All messages tracked are also available from within Outlook. Messages managed are dynamically associated with the defined entities such as contacts, companies and projects, etc. Unknown messages arriving from unfamiliar senders should be systematically filtered; however they can be related to known entities if their origin is determined to be friendly. Any subsequent messages arriving from this source will then be dynamically related to the given object. With a single click a user can then view all inbound/outbound emails associated with a selected entity.

### **Workflow Based Document Scanning**

The Workflow Based Document Scanning component should be designed to enhance office management efficiency by **centralizing** and **automating** all scanning. It should be especially useful in environments where shared resources such as scanners are centrally located to serve a group or a department. It would seamlessly integrate with any TWAIN, ISIS or WAIN compliant scanner and should allow for a **custom workflow** and **custom fields**.

### **Email Marketing & Personalization**

Before creating the bulk email, the software should permit the user to review & modify potential recipient list. Upon creation of the bulk email, all processing should be handled by the email gateway server, immediately freeing up the client resources. In addition, the bulk email must be personalized by placing custom tags and templates in the body. Each recipient will see only their name in the "To" field of the email, protecting the broadcast private and confidential. A link to the broadcast email will be displayed in all outgoing -> email basket of each recipient, giving the ability track and measure a bulk email campaign.

## **Document Management**

The document management component should manage any document or file throughout its life cycle. Starting with the creation stage, any content deposited into the system is automatically indexed and versioned. The server component should be designed to assist organizations comply with regulations of best practices involving retention of business records such as Sarbanes-Oxley. Any content stored can be securely shared over the Internet with multiple participants.

## **Document Scanning (Simple Scanning)**

The Document scanning component should be designed to enhance office management efficiency by centralizing all scanning. It should allow clients to continue using the native application provided by the scanner vendor.

## **Reporting**

The system should include the option of creating custom reports and exporting the results to an HTML or CSV format. All information added to the database should be accessible in the report, including any custom fields added.

## **Notes**

The system should allow the option to create a note and automatically link it to a contact, company, category or project. Shared users should not have the ability to delete a note, but rather append to it. All notes should be automatically indexed to make them searchable and should include a timestamp every time they are updated.

## **Collaboration**

The system should be able to collaborate on all information and include permission control capabilities, thus creating a complete collaboration solution for an office.

## **RIP Server (PDF / HTML printer converter)**

The Rip Server component should be a conversion engine which processes all binary items (incoming or outgoing) from any Windows application & converts them, on the fly to common formats such as HTML & PDF in preparation to be searched.

## **Business Card Scanning**

The business card scanning component should scan business cards and associate them with entities defined within the software's 4 dimensional management system. Business cards are then automatically passed through an OCR engine that reads all relevant data found on the business card. Extracted data can then be edited and stored as a new entity.

## **Fax Management**

Faxes should be sent/received directly from any client, permitting the user to obtain real time status information and instantaneous notifications of errors. Just like with Email, faxes are neatly filed away within the database. This component can also offer inbound fax management where a single fax number is used to serve multiple recipients.

Delivering items such as faxes to other users should be a simple drag & drop operation. Upon delivery, the user will receive a notification informing them of the new item. The item can then be manually deposited into any of the entities associated baskets (faxes, documents ..) by dragging and dropping the object, to any existing entity.

## **PBX – Telephony Integration**

The system should support all Asterisks based PBX systems. A user can begin using a built in soft phone offered as an additional component. Softphone features should include: transfer, conference, hold, dial extension, view all active calls, and many more. Making an outgoing call will be a simple one click operation. When detecting an incoming call, the software will display callerID data and automatically navigate the user to the view associated with the calling party. Also, incoming and outgoing calls are transparently recorded and archived just as is the case with emails. Furthermore, searchable notes may be added to the call record. In addition, custom dialing rules can be setup by the administrator to further enhance usability.

## **Skype - VoIP**

VoIP is quickly becoming a viable alternative to traditional telephone communications by allowing users to transform their computer into a telephony device. With a single click, a user should be able to automatically dial Skype conversations.

## **Calendar Sharing**

Creating an appointment or meeting should be a simple click away. Sending a meeting request to a user, contact or project should allow the creator to quickly and transparently distribute the invitations among the required participants; even the acceptance replies are automatically managed by the system giving a simple meeting a fresh new workflow dimension. As well, users should have the option to share a calendar event so that it can be viewed by other users. This should include permission control as not all users want to share their calendar. As with emails, all calendar events will be automatically & neatly filed away under their respective collection baskets. All calendar contents are also automatically indexed making them fully searchable.

## **Mapping & GPs services**

The map component will let the user easily view a distribution of clients over a certain area, eliminating the need to leave the program in order to use a 3<sup>rd</sup> party mapping software such as Google earth. The map plug-in will be fully integrated with Microsoft Map and can even be connected to a mobile GPS system to guarantee perfect accuracy.

## **Outlook Integration**

The software should be fully integrated with Microsoft Outlook. It will include the ability to import/export all contacts, companies and categories to/from Outlook. In addition, an automatic two-way sync of all contacts, calendar events and emails to/from Outlook should exist.

## **Seamless Integration with any IMAP/POP3 Connector**

The software should be able to seamlessly integrate with any IMAP/POP3 email accounts, including free providers such as Gmail, Yahoo and Hotmail so that all email accounts used by users can be easily added and managed within the application. The user thus never needs to login to these email accounts through a web browser.

## **Search and Indexing**

Searching should be a simple process where the user only needs to type in a word and click the search button. The software should be able to search all information including the body of an email, note or calendar event in addition to any custom fields added. In an advanced mode, the search feature should include the ability to search relationships created within the 4 entities. Once a search is complete, a preview of each search result should be shown.

.....Look No Further, InfoFlo, the world's first and only truly integrated CRM office solution has arrived!!

Unlike our competitors, InfoFlo is a one-time cost for life and includes free upgrades!! Please visit [www.carmelvision.com](http://www.carmelvision.com) and take advantage of our FREE 30 DAY TRIAL.

# InfoFlo

Manage Information Overload by Automatically Linking and Archiving All Office Communications Under One Umbrella



## other information activities include...

- Calendar
- Notes
- Comments
- Faxes
- Scans
- Telephony
- PDF Converter
- Backup
- and many more!

