P R O D U C T

G U I D E

Discover the

features and

functionality

of Everest™

and improve

quality

within your

organization.





Introduction

The focus of this product guide is to give new users a basic understanding of the powerful features that Everest provides. For more in-depth setup instructions, please see the on-line help available within the software. In addition, Lynk Software can provide expertise in Everest configuration as well as customer focused quality processes. Please contact Lynk Software at 480.998.1933 or Support@lynksoftware.com.

Everest is flexible and can be customized for a wide range of industries and business processes. Our customers use Everest to handle any type of customer request or feedback, manage high value or complex complaint procedures and complete internal or third party corrective actions. In essence, we help our customers build lasting customer relationships and deliver superior quality.

Everest combines leading technology with business-tested functionality to provide organizations with a proven solution for enhancing customer relations while achieving continuous improvement. The customizing options are built right into the user interface. This ensures flexibility, scalability and an on-time implementation with no hidden costs.

Everest is available as a 100% browser based application (Everest Web) or as a traditional client/server application (Everest Enterprise).

Everest:

- Manages relationships with customers, consumers, suppliers, distributors, prospects
- Tracks complaints, requests and activities that result from these relationships as well as issues and corrective actions that result from internal investigations
- Facilitates communication and provides a department or an entire organization with consistent, easy to access information and streamlined work processes

Everest Features

- User friendly interface
- Highly scalable from 1 to 1000 users
- Customizable fields, tabs and workflow
- Letters and e-mail with keyword insertion
- Attachment of related documents
- Access privileges determined by user group
- Due Date tracking for sales activities, actions and concerns
- Automatic reminder, past due and escalation e-mail notices
- Extensive reporting and charting, including user defined queries



Everest Users

- Customer and Technical Service
- Quality Assurance
- Sales and Marketing
- Management

Everest synchronizes customer service, quality assurance, sales, marketing and management by providing consistent, easy to access information.

Customer and Technical Service

Everest arms front-line customer service representatives with crucial information. Detailed account profiles, past complaint history and a search capability allow customer service representatives to communicate effectively with all customers. Issues that can be resolved immediately will be recorded and closed. An automatic e-mail or letter response can be sent to the customer. For more complex complaints, the customer service representative is empowered to engage others in the resolution process by assigning action requests or assigning a new owner. Through a customizable workflow, establishment of ownership, due date reporting and automatic reminders, every customer is guaranteed a timely and thorough response.

Quality Assurance

Continuous improvement occurs within an organization when problems are identified, root causes are determined and solutions are found. Everest provides quality assurance and engineering teams with a framework for tracking customer complaints, requests, product defects and corrective actions. Corrective actions may be the result of a customer complaint or an internal event such as a review meeting or an audit. A corrective action report can be e-mailed or sent to the customer empowering the customer to improve the quality of the products they receive. Alternatively, corrective action requests can be sent to a supplier to ensure receipt of quality products. Problem Types, Categories and three levels of Defect Codes are user-defined, resulting in meaningful reports and charts. The application is fully compliant with the corrective action tracking requirements of ISO and QS quality standards as well as FDA regulatory standards.

Sales and Marketing

Everest contains a comprehensive customer and prospect profile including contact information, sales activities, equipment or product profiles and previous complaint history. Sales activities can be scheduled and easily executed with pre-formatted notifications. Documents such as quotes or directions to a customer's office can be attached to the account file and easily accessed through the Internet. Reports can be printed prior to internal and customer meetings for reviewing and sharing important customer related events and information.



Everest Organization

Everest is a customer-centric application organized by Accounts, Internal Areas, Concerns and Action Requests. Within Everest the term "Concern" has a broad meaning and refers to any external or internal issue that needs to be tracked.

New customer complaints, requests or support calls (all considered a "Concern") will be entered under the respective Account. All internal concerns, for example audits, supplier non-conformances and quality improvement projects, will be entered within an Internal Area. The subsequent workflow will be customized by problem category, default owner, standard turn around times and required actions.

For every concern there are two levels of ownership. The Concern Owner has high-level responsibility for ensuring that all concerns are handled within the designated time frame and that the customer is notified of the resolution when appropriate. Action Owners have responsibility for the corrective actions or sub tasks that are required to resolve a concern. In some cases, the Concern Owner and an Action Owner will be the same person. In other cases the Concern Owner will assign required actions throughout the organization and even to third parties (i.e. suppliers or distributors).

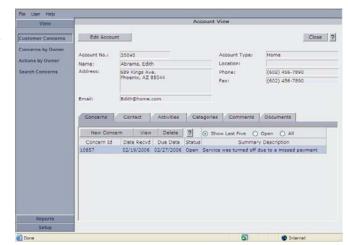
Existing concerns are tracked and updated through the <u>Concerns by Owner</u>, <u>Actions by Owner</u> and <u>Search Concerns</u> buttons on the main menu. Data filtering criteria includes Control Id, Problem Type, Product Group, Product Id, Keywords, Concern Owner, Owner Department, Owner Location and Action Owner.

Accounts

The <u>Account Concerns</u> button will take you directly to the Accounts. Account Types are user defined and can include customers, consumers, suppliers, distributors, prospects and others. Accounts can be entered as needed or imported from other databases. Selecting a specific Account will take you to the *Account View* that is tailored for each organization. The *Account View* can be easily recognized by the display of the name, address, phone numbers etc...

The Account View notebook contains a tab for **Concerns** and a tab for **Contacts** along with optional tabs for:

- Activities
- Categories
- Comments
- Documents
- Equipment





The **Contacts** tab can have an unlimited number of contacts. Account **Activities** are used to execute and record sales activities, for example, phone calls, on-site meetings, direct mail or email. The **Categories** tab is used to classify accounts and record additional account information in 10 user-defined fields. **Comments** provide a large text area for documenting account information. The **Documents** tab provides a list of attached documents or images. The **Equipment** tab provides a list of maintained or supported equipment or software for each account. The Equipment information also includes up to 10 user-defined fields.

Internal Areas

Internal Areas are user-defined and can be based on departments, production lines, manufacturing facilities, branch offices or any other organizational structure. *Internal Areas* are generally concerned with process improvement, internal non-conformances, supplier nonconformances and quality audits.

The *Internal Areas* notebook contains tabs for **Contacts** and **Concerns**. Contacts for internal areas can be staff members or outside consultants within each area.

Additional tabs may include:

- Activities
- Documents
- Equipment

View	Starting Wit	th		Sort By: () Ar	ea Name
	During the	Go			escription
Account Concerns		1000		O Lo	
Internal Concerns	1			O Ar	
Concerns by Owner	Select	New Area	Delete Area		
Actions by Owner	Area Nam	ne	Description	Location	Area Id
Search Concerns	Assembly	C	omputer Assembly	Kansas City	20109
	Distribution Center		dwest Region	Kansas City	20153
Open RMA's	Distribution Center		estern Region	San Francisco	2039
	Distribution Center	Ea	stern Region	New York	2017
	Fabrication	Se	emi-Conductors	New York	20150
	Finish	Pr	oduct Finishing	New York	2089
	Finish Packing		oduct Finishing ark and Pack	New York Kansas City	2089 20110

Concerns

Concerns will be generated and listed within the associated Account or Internal Area. This important customer-centric perspective of all past and current concerns enables real time customer support and data analysis. To see the *Concern View*, simply click on <u>View Concern</u> on the **Concerns Tab** of the *Account* or the *Internal Area*.

The *Concern View* is also organized with notebook tabs. Concern content will be highly customized by each organization. User-defined reference fields, action types, problem types, defect codes and cause categories provide a flexible foundation for comprehensive information management. All of the notebook tabs can be re-labeled to match local terminology. Many of the standard data names can also be re-labeled to match local terminology.



The *Concern View* tab options are the same for Accounts and Internal Areas. Concerns begin with a **Concern** tab along with optional tabs for:

- Reference
- Products
- Returns
- Repairs
- Actions
- Attachments

	C	Concern View			
Account Name: Academy Office Products Control Id: 10064		Sum	mary Report Canc	el Sa	ave
Concern Reference Product Retu	Irns	Actions Atta	achments		
Summary Description	_	Concern Type:	Administrative		-
Shut down after short period of operation.		Category:	Wrong Customer		-
Detail Description					
The customer order 10 computers. Nine of the computers work fine and one of the computers wil	*				
but down after a short period of operation.		Contact:	Bill Smith		-
		Originator:	Manager, System		•
		Owner:	Jennings, Linda	į	•
	Ŧ		Notify Owner		
Resolution	_	Date Received:	02/02/2006 Tir	me Reovd: 09	:12
Resolution		Date Due:	02/09/2006 🛄 Du	e Days: 7	
	_	Date Closed:	Ad	tual Days: 0	
		Priority:	Normal Priority		~
		Cause:	Supplier Caused		~
		Status:	⊙ Open ⊖ Closed	1	

A total of 30 user-defined fields are available within the *Concern View*. The reference fields provide various formatting options and can contain user-defined drop down lists or a pop-up date calendar.

Third parties, such as suppliers, distributors or contractors can be associated with a concern on the **Reference** Tab. This allows for action assignment to the third party contacts and for letters or e-mails to be generated based on a template. In addition, reports and charts will provide an overview of third party involvement in both customer and internal issues.

The **Product** Tab will contain a searchable product file. The Product file can be maintained manually in the Administration Menu or can be imported from other databases. Product defect codes can be defined in one, two or three levels. Drill-down charts provide a detailed presentation of defects within customers, products or product groups.

Return Authorizations are generated and a completed RMA letter can also be printed or emailed to the customer. Each Return Authorization is generated with an expiration date and can be tracked to completion with a final disposition.

The **Repairs** Tab contains 10 user-defined fields for tracking repair related information. It also contains a drop down list of all equipment records that have been added to the **Equipment** Tab within the *Account View*.

Actions determine the workflow and drive the problem resolution associated with each concern. Problem investigations can be initiated, e-mail notifications can be sent and letters can be printed. Any type of action can be defined and tracked for timely completion.



Actions

Actions record all the sub-tasks that are required to resolve a concern. Action Types are userdefined and may include Product Alerts, Corrective Actions and Customer Letters.

The *Action View* has a section for the **action request** or **problem statement** and three possible reply formats:

- 1) None
- 2) Response (simple reply)
- 3) Corrective Action

Response

Corrective Action

		Action Request			Action Request		
Account Name: Control Id:	Academy Office Products \$0064		Action Report	Cancel Save	Account Name: Academy Office Products Action Report Control Id: 10064	Cancel	iave
Action Id:	80074	Send Notice	2 12	T.			1
Action Type: Assignment: Action Owner: Date Issued:	Customer Response User Name Sennings, Linda 03/05/2007	Sent To	Date Notice		Problem Statement The customer order 10 computers. Mine of the computers werk fine and one of the computers mill shut down after a short period of operation.		
Date Due: Date Complete: Date Closed:	03/08/2007	Requested By: Response Compl Response Closed			Containment Action	Effective Date	
		Request		4			
					Findings		
					-		
				1	Root Cause		
Done			5	💣 Internet	(d) Done	💣 Internet	

Some action types, such as a general product alert, may require no reply. The Response format is used for action types that require a simple narrative response.

Corrective Action Requests expect a full investigation and comprehensive reply. This sample Corrective Action format is user-defined in the Configuration menu and can be customized according to your current process. A Corrective Action Report can be printed or emailed.

Sample Corrective Action Format:

- Problem Statement
- Containment Action
- Findings
- Root Cause
- Short Term Corrective Action
- Permanent Corrective Action
- Preventive Action
- Verification



Notification Letters and Email Messages

Email notifications and letters can be sent to action owners, customers, distributors, suppliers and others.

Everest supports embedded keywords for automatic insertion of database information.

A list of keywords and descriptions can be found in the Everest on-line Help.

🛃 FinalResp.rtf - Notify Template
<u>Eile Edit View Insert Format Spelling H</u> elp
Times New Roman (Western)
<u></u>
 [Date]
[ContextName] [CustomerXame] [CustomerAddress]
Dear [FirstName],
Thank you for reporting a problem concerning the [ProdDesc].
[Response]
Pleaes contact me if you have any further questions.
Regards,
[OwnerName]
For Help, press F1 NUM

Notifications can be used for an unlimited number of action types and sales activities. For example a notification can be used to assign an action or to send a final response letter to a customer.

The message is expanded from the Notification Template. The keywords have been filled in from the information found in the database.

All notifications can be e-mailed or printed as a letter.

	: Initial Response				
Send To:	Action Owner			Copy To:	
From:	Cary Grant <cary@lynksoftware.com></cary@lynksoftware.com>]		Criginator	
To:	Linda Jennings <lj@lynksoftware.com></lj@lynksoftware.com>			Account R	
CC:				Service R	ер
Subject:	Initial Response for Control Id 10064				
	2007 Office Products				
	and Trail				
Ashland, F	and Trail				
Ashland, F Dear Bill,	and Trail	details have beer	received:		
Ashland, F Dear Bill, Thank you	and Trail FL 42202	details have beer	received:		
Ashland, F Dear Bill, Thank you Concern T	and Trail FL 42202 for the problem that you reported on 02/02/2006. The following	details have beer	received:		

Reminder, Past Due and Escalation Notifications

Concerns and Actions are monitored for timely completion. <u>Reminder</u> notifications can be generated when due dates are approaching. <u>Past Due</u> notifications are generated when a due date has lapsed. <u>Escalation</u> e-mail notifications are sent to designated supervisors when past due notifications are not effective.



Reports

All Reports can be printed, e-mailed or saved as a file.

A complete <u>summary report</u> provides all detail related to a concern:

- Customer and Contact
- Reference Information
- Supplier and Contact
- Distributor and Contact
- Products
- Corrective Actions
- Final Summary

A <u>corrective action report</u> in an 8D format or other custom format is also available and may include:

- Problem Statement
- Containment
- Findings
- Root Cause
- Short Term Corrective Action
- Permanent Corrective Action
- Preventive Action
- Verification

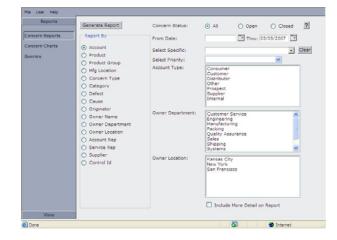
Concern Summa	ry .		As Of	03/05/2007	Page No. 1	-
Control IS 10064	Date Recvit 02/02/2006	Du# Date 02/09/2006	Cicee Date	Status Open, No	ormal Priority	
Orginator System Manager	Owner Linda Jen	nings	Department Quality Assum		Lecation Kansas City	
Account.	2001 Academy Office Pr 9226 Midland Trail Ashland, FL 42202	oducts	Contax Phone Noble Fax	323-1234		
Phone: Fax:	(606) 854-8555 (480) 998-4979		Linac	usmange	westcom	
Concern Type Summary Description Detail Description	Administrative Shut down after s The customer ord shut down after a	ler 10 computer	s. Nine of the com	Wrong Cus puters work fine	tomer and one of the comput	ers will
Cause:	Supplier Caused					
Sales Order No 555-1212	Cuatomer P.O. 1087-99	Cust Car No nia		arrier Name Federal Express	Waybil Number 812-011-21	

First Page	Next Page	Prev Page	Last Page		Print	Email	Close
Corrective	Action	A	s Of: 03/05/2007		Page	1 of 1	^
Action Type:	Correctiv	e Action		Date Issued:	02/02/2006		
Action Id:	80038			Date Due:	02/07/2006		
Control Id:	10064			Requested By:	System Manager		
Product	DT-40001			Assigned To:	Robert Wilson		
Accounts	Academy	Office Products		Verification By:	System Manager		
Problem State	ment						
The customer of operation.	rder 10 computer	s. Nine of the co	nputers work fine an	id one of the computers will sh	hut down after a short per	od of	
Containment / Stop all shipmer				Ef	Nective Date: 02/07/	2006	
Findings:							1
10% of shipmen	ts has the same	error.					
Root Cause:							1 -
Supler component	ent.						1
Corrective Ac				6	ffective Date:		1
Suppler has be	en assigned a co	rrective action					×

Concern Reports

Concern Reports can be generated with the click of a button and sorted by:

- Account
- Product Id
- Product Group
- Concern Type
- Owner Name
- Owner Department
- Owner Location
- Account Rep
- and more.





Charts

A complete set of reports and charts are on hand to visually represent problem areas, trends, and IMPROVEMENTS! Charts can be printed or copied to the clipboard for pasting into word processing documents or web pages.

Chart By:

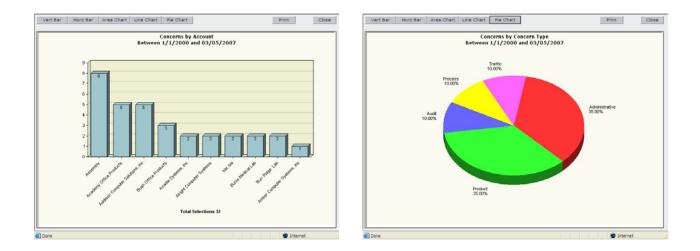
- Account
- Product
- Concern Type
- Cause
- Trends
- Aging
- More

Data Selection Criteria:

- Date Range
- Open / Closed Status
- Account Type and Categories
- Owner Department
- Owner Location

Chart formats include:

- Vertical Bar
- Horizontal Bar
 - Area
- Line
- Pie



User Defined Queries

User Defined Queries selectively retrieve Account, Concern or Action records and can be saved for later use. Queries can produce a report or take the user directly to the Concern record.

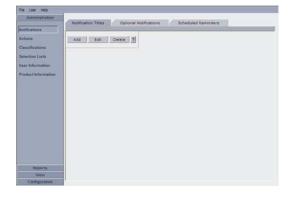
Sample Query					Status	OK ?		File Liser Help						
		S.I.C. Code		Public View	All Open			Reports	New Quer	/ Edit Quer	y Delete	Query		1
Account In	formation Only				O Closed			Concern Reports Concern Charts	Select Query	Sample Que	iry		orm Search Total Selected: 45	
Account	Industry						-	Queries				Where		
Account	Source							1						-
Account	S.I.C. Code	~	~	contra	lid				P					
Account	Annual Revenue								-	1		and the second se		
Account	Credit Status								Report	View Detai	is Exc	el		_
Account	Home Page								Control Id	Date Issued	Date Due	Concern Type	Category	102
Categories	Category								10059	01/30/2006	02/28/2006	Product	Mechanical Failure	
Concern	Control Id	¥							10057	02/02/2006	03/02/2008	Administrative	Faled Audit	
Concern	Date Issued	×							10034	01/30/2008	02/28/2006	Administrative	Wrong Price	
Concern	Date Due	~							10077	01/18/2006	02/16/2006	Process	Faled Audt	
Concern	Date Closed						_							
Concern	Priority								10078	01/16/2006	02/16/2006	Process	Marking - Wrong Mark	
Concern	Due Days								10079	01/16/2006	02/16/2006	Audit	Internal Audit	
Concern	Actual Days Contact Name								10052	02/02/2008	03/02/2005	Product	Mechanical Failure	
Contects	Originator								10033	01/30/2006	02/28/2006	Traffic	Damaged	
Concern	Originator Originator Department								10056	02/02/2006	03/02/2006	Administrative	Wrong Quantity	
Concern	Originator Location								10050	02/02/2005	02/07/2006	Product	Electrical Failure	
Concern	Owner								10089	01/10/2008	02/16/2006	Product	Mechanical Failure	
Concern	Department								10022	01/23/2005	02/23/2006	Product	Electrical Falure	
Concern	Location								10024	01/23/2006	02/23/2006	Product	Electrical Failure	
Concern	Supplier Id													
Concern	Supplier Name								10025	01/23/2006	02/23/2006	Administrative	Wrong Price	
Concern	Supplier Contact								10026	01/23/2006	02/23/2008	Administrative	Wrong Quantity	1.18
Concern	Distibutor Contact													ع
Concern	Concern Type	×					-	View				_		
Done						Internet		Done Conte					2 Internet	



Administration

The Administration menu allows users to update system options. Access to the Administration menu is controlled by User Group.

- Notifications
- Action Types
- Classifications
- Selection Lists
- User Information
- Product Information



<u>Notifications</u> are first created within Word or Notepad and saved as an .rtf file (rich text format). After the template is created it should be saved on a local hard drive. Then, the notification title is defined and imported into the application by clicking on the ellipse (...). The notifications will appear in the drop down lists for Action Requests and Sales Activities when the appropriate box is checked.

Action Types with a title, due days, reply type and a default notification can be established.

Within <u>Classifications</u> the Concern Types and Categories (sub-type) can be defined. Each Category can have a default owner, turn around time and actions.

<u>Selection Lists</u> contains the drop down options for Priorities, Cause, Dispositions, Account Types, Account Categories and Activities.

<u>User Information</u> is used to establish User Groups, User Departments, User Locations and Users. Each User will require a Group, Department and Location. The User Group will determine which View Menu Buttons and Tabs are present and will also determine access privileges.

Product Groups, Unit of Measure options, Defect Classifications and Products will be entered under <u>Product Information</u>. Each Product will require a Product Group. Three levels of Defect Codes can be defined under Defect Classifications.

Configuration

The configuration menu is typically reserved for system administrators and is used to define <u>Button & Tab Names</u>, <u>Data Names</u>, <u>Corrective Actions</u>, <u>Required Fields</u>, <u>User Defined Fields</u>, <u>Holidays</u> and <u>Other Options</u>. In addition, <u>Connect Database</u> and <u>Configure Mail</u> options are available.