PRODUCT GUIDE

Discover the

features and

functionality

of Everest™

and improve

quality

within your

organization.

EVEREST™

Customer Focused Quality

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).

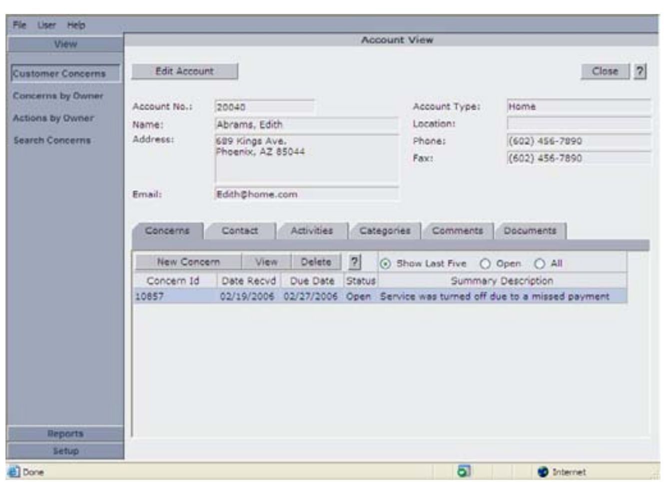
Existing concerns are tracked and updated through the Concerns by Owner, Actions by Owner and Search Concerns buttons on the main menu. Data filtering criteria includes Control Id, Problem Type, Product Group, Product Id, Keywords, Concern Owner, Owner Department, Owner Location and Action Owner.

Accounts

The Account Concerns 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 e-mail. 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.

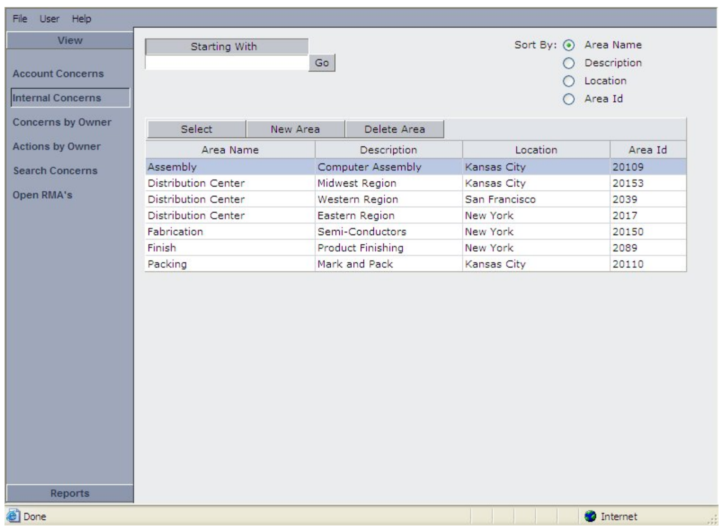
Internal Areas

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 non-conformances 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**



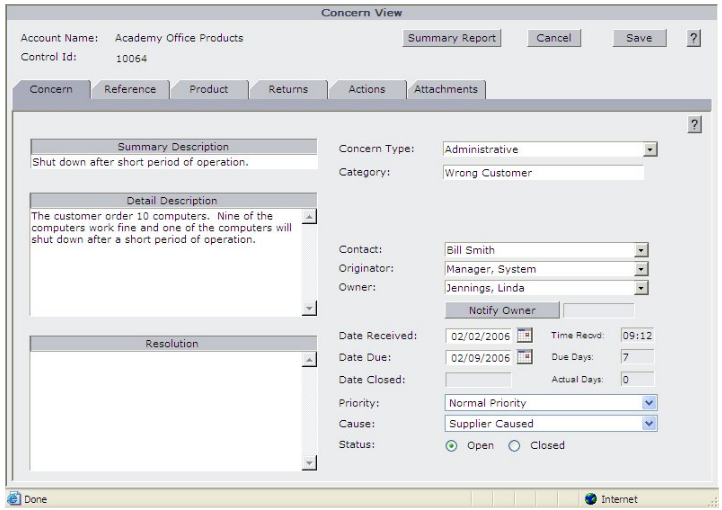
Concerns

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 View Concern 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**



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 e-mailed 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.

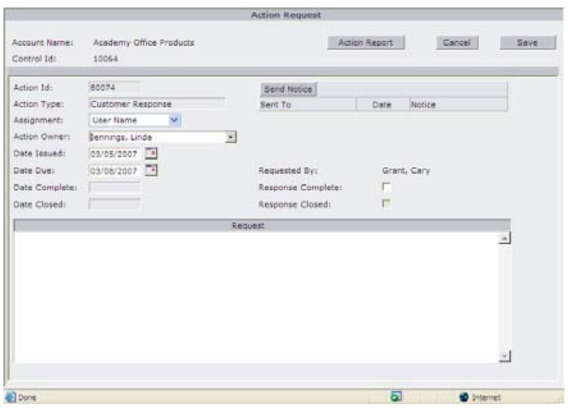
Actions

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

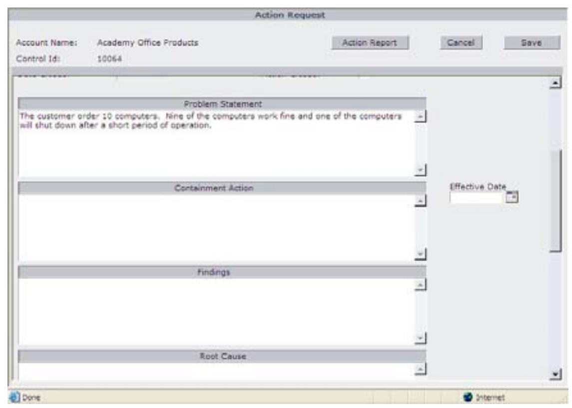
The *Action View* has a section for the **action request** or **problem statement** and three possible reply formats:

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

Response



Corrective Action



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:

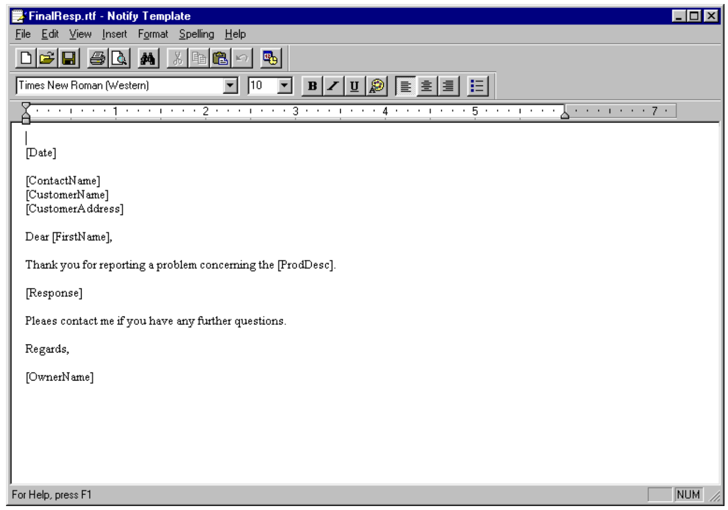
- Problem Statement
- Containment Action
- Findings
- Root Cause
- Short Term Corrective Action
- Permanent Corrective Action
- Preventive Action
- Verification

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.

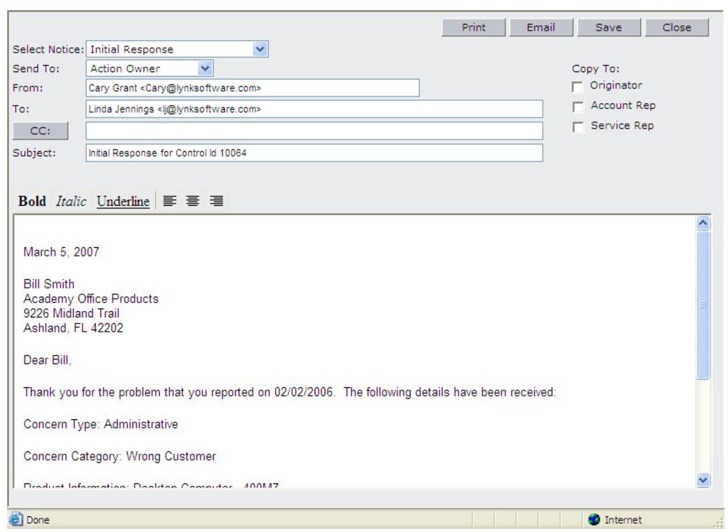
A list of keywords and descriptions can be found in the Everest on-line Help.



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.



Reminder, Past Due and Escalation Notifications

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

Reports

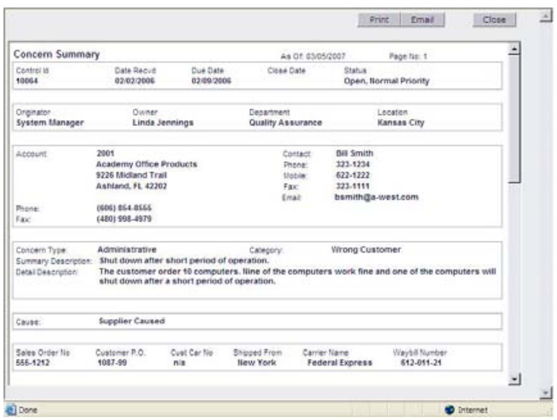
All Reports can be printed, e-mailed or saved as a file.

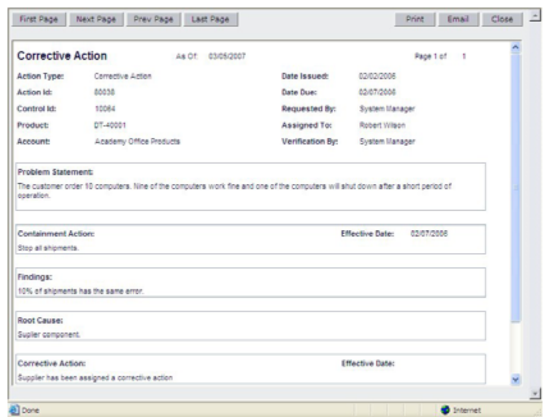
A complete summary report provides all detail related to a concern:

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

A corrective action report 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

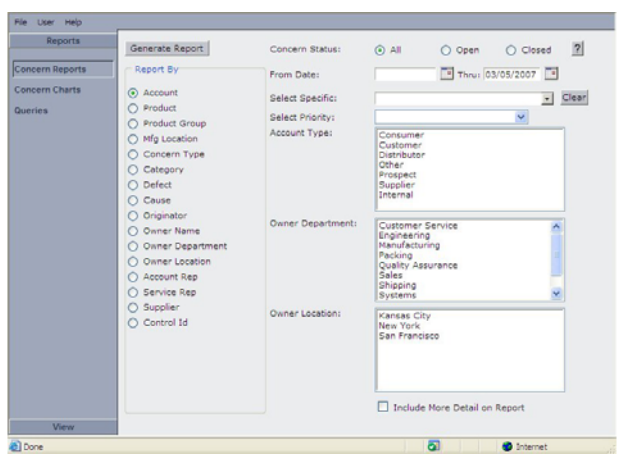




Concern Reports

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:

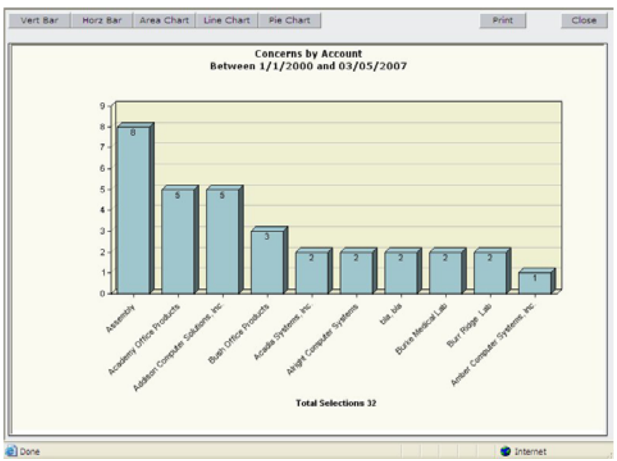
- Account
- Product
- Concern Type
- Cause
- Trends
- Aging
- More

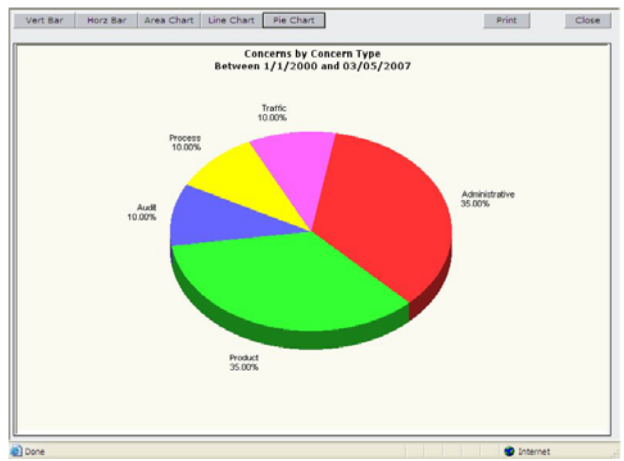
Data Selection Criteria:

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

Chart formats include:

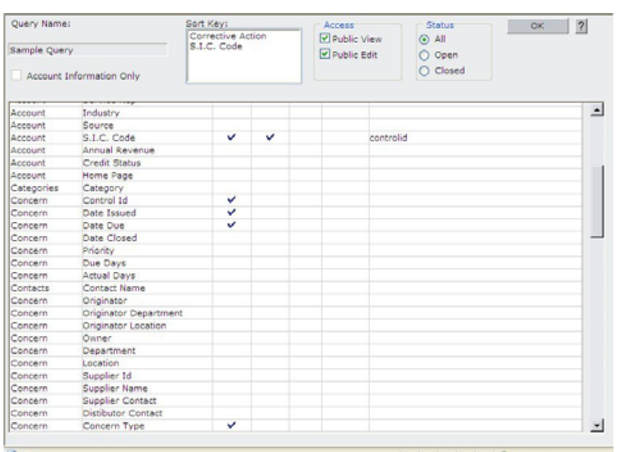
- Vertical Bar
- Horizontal Bar
- Area
- Line
- Pie

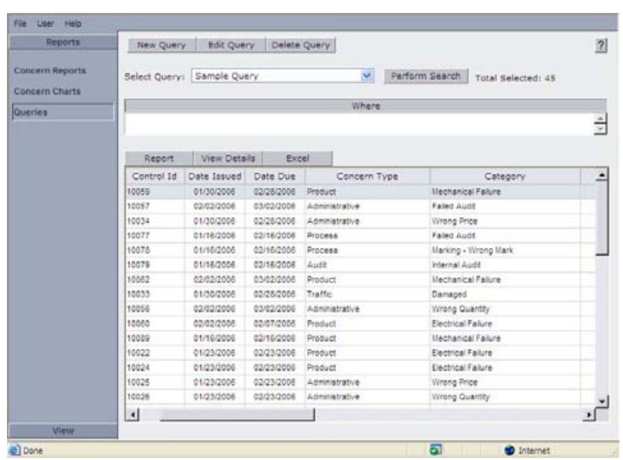




User Defined Queries

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.

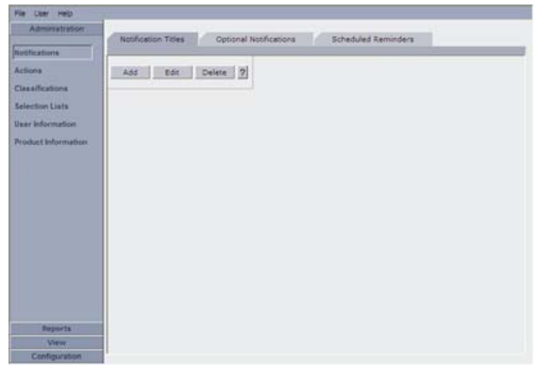




Administration

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



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

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

User Information 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 Product Information. 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 Button & Tab Names, Data Names, Corrective Actions, Required Fields, User Defined Fields, Holidays and Other Options. In addition, Connect Database and Configure Mail options are available.