

- :: Privately Owned, 10+ Years of Service
- :: Consistent annual growth
- :: Stable financial structure
- :: Strong record of successful implementations
- :: Rapid expansion to new segments in 2016



Inception CRM

Product Overview

16.02.2017 | D3S a.s.

Global Service Capability



Successful Projects In More Than Three Dozen Countries

Most of our software projects reflect a broad set of functional requirements. In each case, global/corporate and country-specific requirements are met with **a flexible and adaptable** approach and implemented in an **efficient and cost-effective** manner in keeping with local budgets and expectations.

- Albania
- Austria
- Belgium
- Bosnia
- Bulgaria
- Czech Rep.
- Cyprus
- Denmark
- Finland
- Hungary
- Iceland
- Iran
- Iraq
- Italy
- Jordan
- Kosovo
- Lebanon
- Luxembourg
- Macedonia
- Morocco
- Netherlands
- Palestine
- Poland
- Romania
- Serbia
- Slovakia
- Slovenia
- Spain
- Sudan
- Sweden
- Switzerland
- Syria
- Tunisia
- Turkey
- Ukraine
- United Kingdom
- USA

Successful Projects In More Than Three Dozen Countries

Our clients have included some of the world's largest and most prestigious companies, representing a diverse a range of industries, from pharmaceuticals to telecommunications, manufacturing, online media and advertising.



Inception CRM

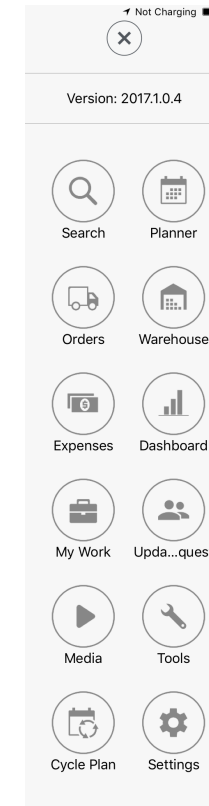
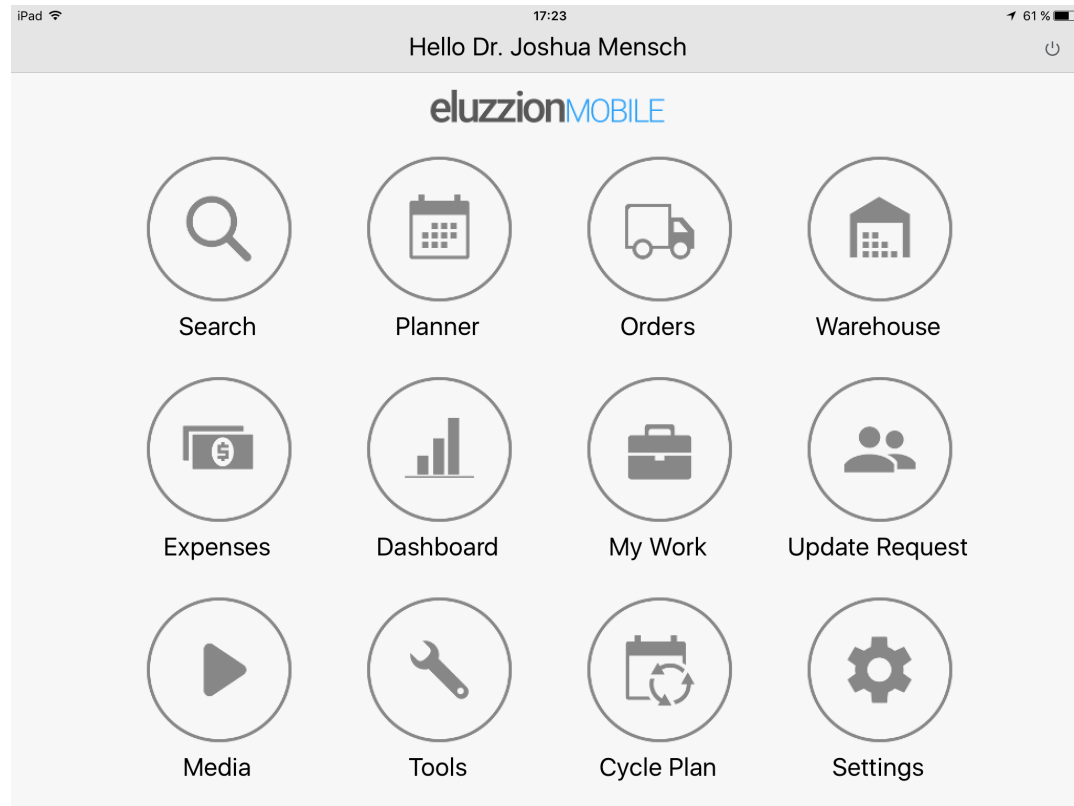
for iPads & Android Tablets

Inception CRM is a robust & user-friendly CRM app for sales teams that harnesses the power and flexibility of iPads, Android tablets, and Windows PCs to deliver superb performance on the go.



Our fully native CRM apps guide users through even the most complex workflows with ease and efficiency. With a few clicks, sales representatives can research customers, optimize plans, report activities, present media, create orders, manage promotional expenses, and track their most important KPIs.

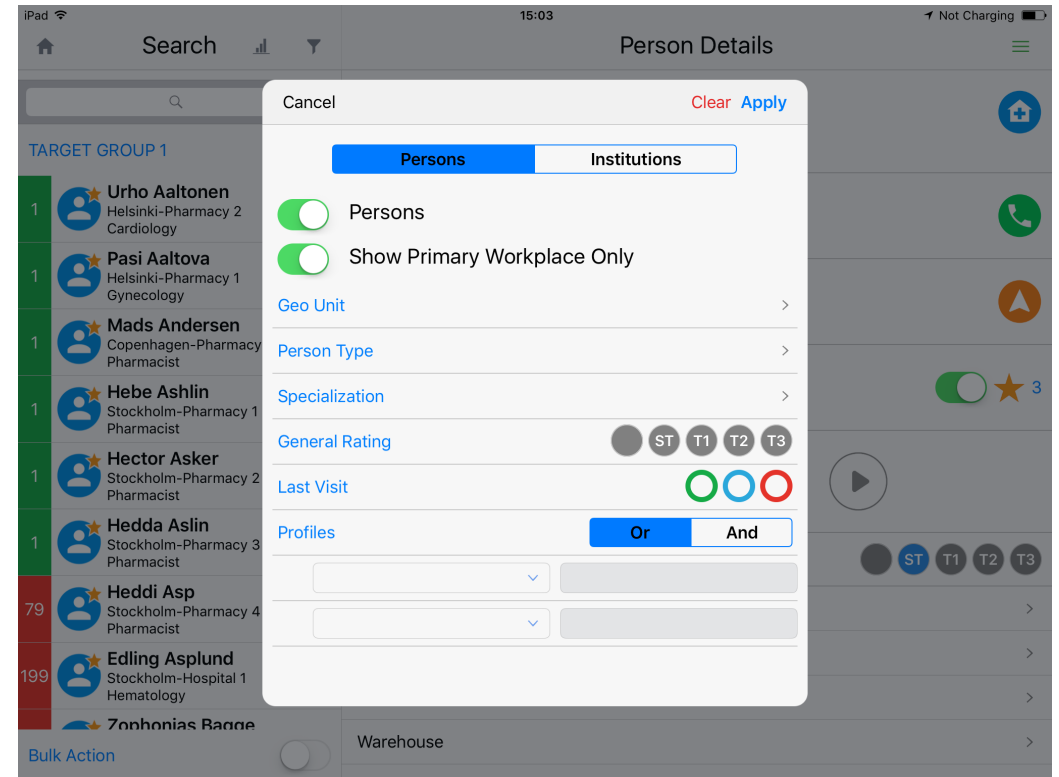
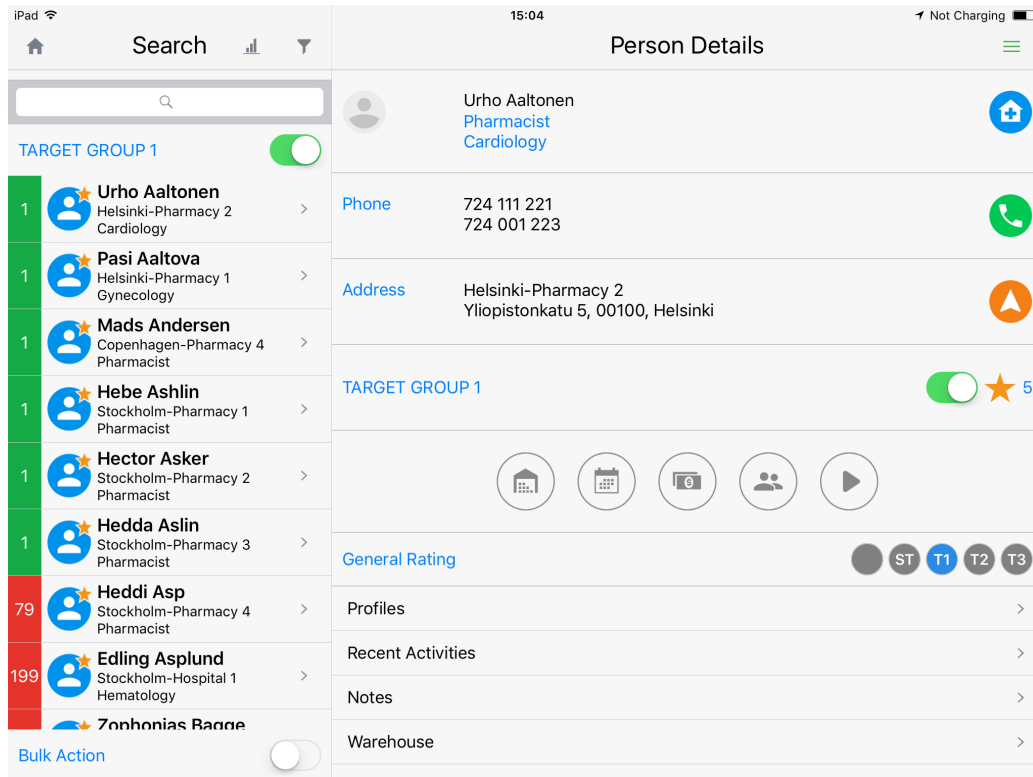
1. HOME PAGE & QUICK NAVIGATION MENU



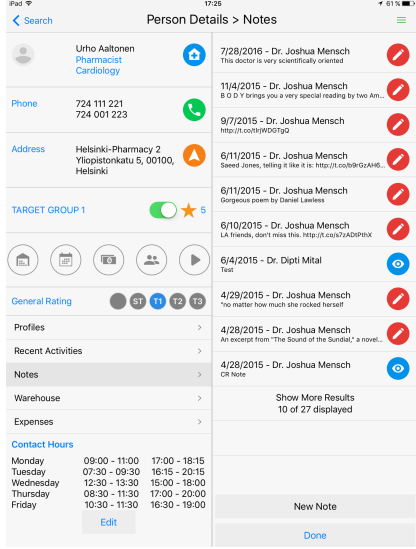
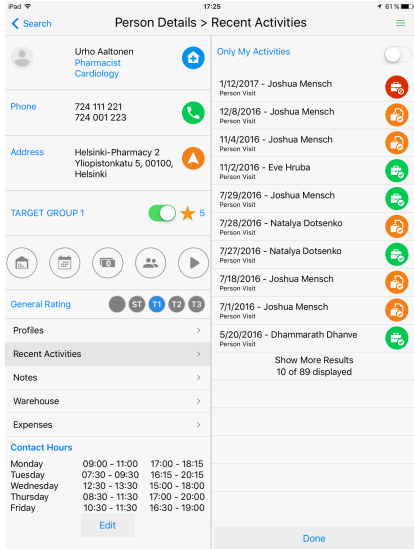
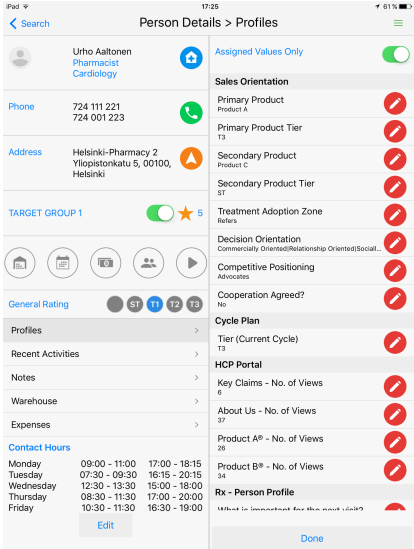
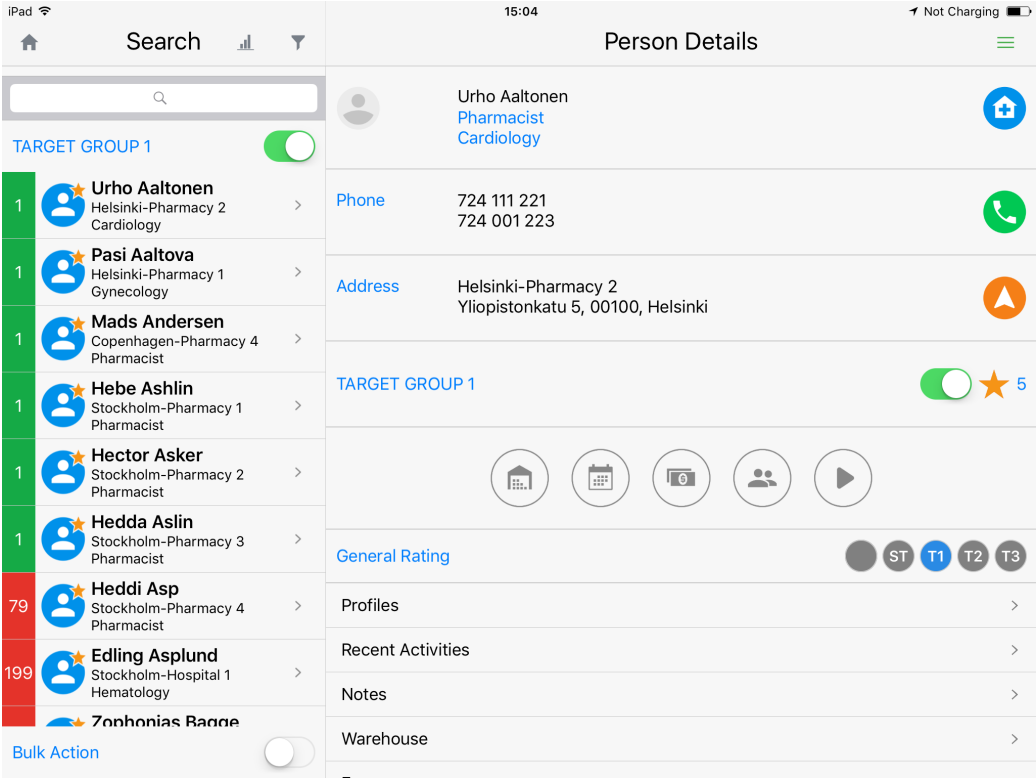
HOME PAGE provides immediate access to all modules, which can also be accessed via the sidebar menu from any module within the application.

2. HCP MANAGEMENT AND PROFILING – Search & Customer Cards (Search Module)

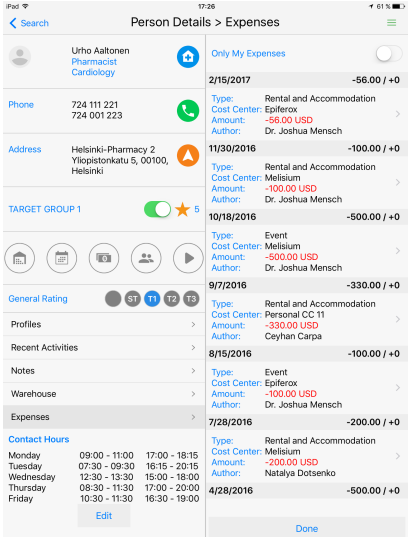
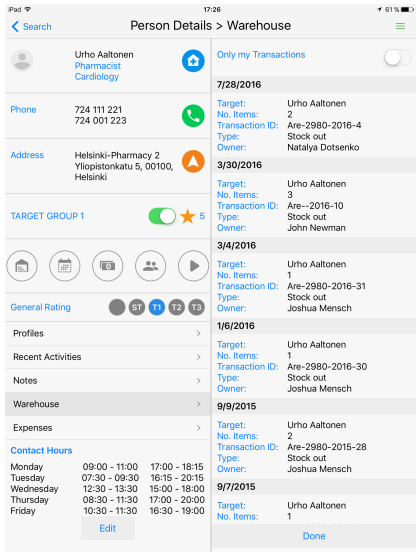
- Includes customer cards and rich features such as profiles, interaction histories, promo drops, orders, notes, and expenses
- Supports an unlimited number of profiles and multiple profile types (e.g. static vs. dynamic, editable vs. locked)
- Customer cards provide direct access to relevant modules such as Planner, Warehouse, Orders, Expenses, Media, and Updates
- The features of the Search List include bulk actions, free text search, and advanced search filters.



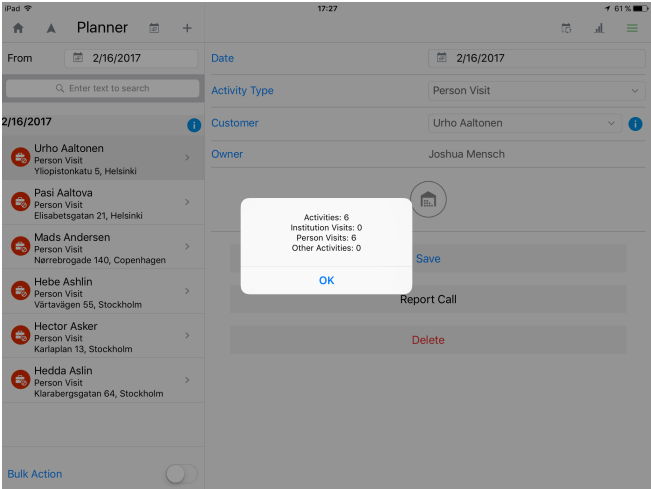
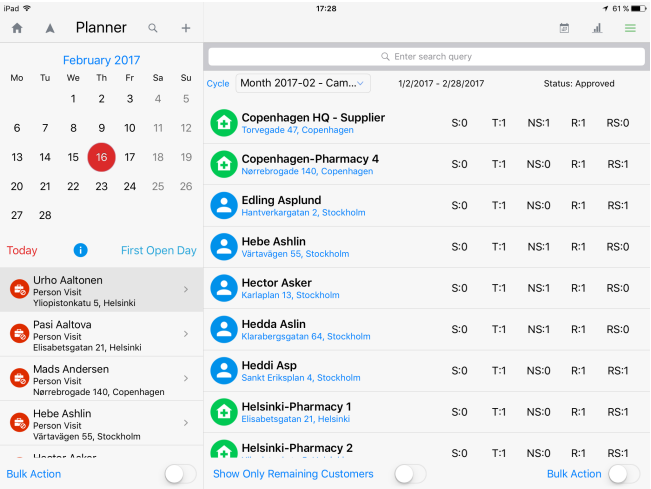
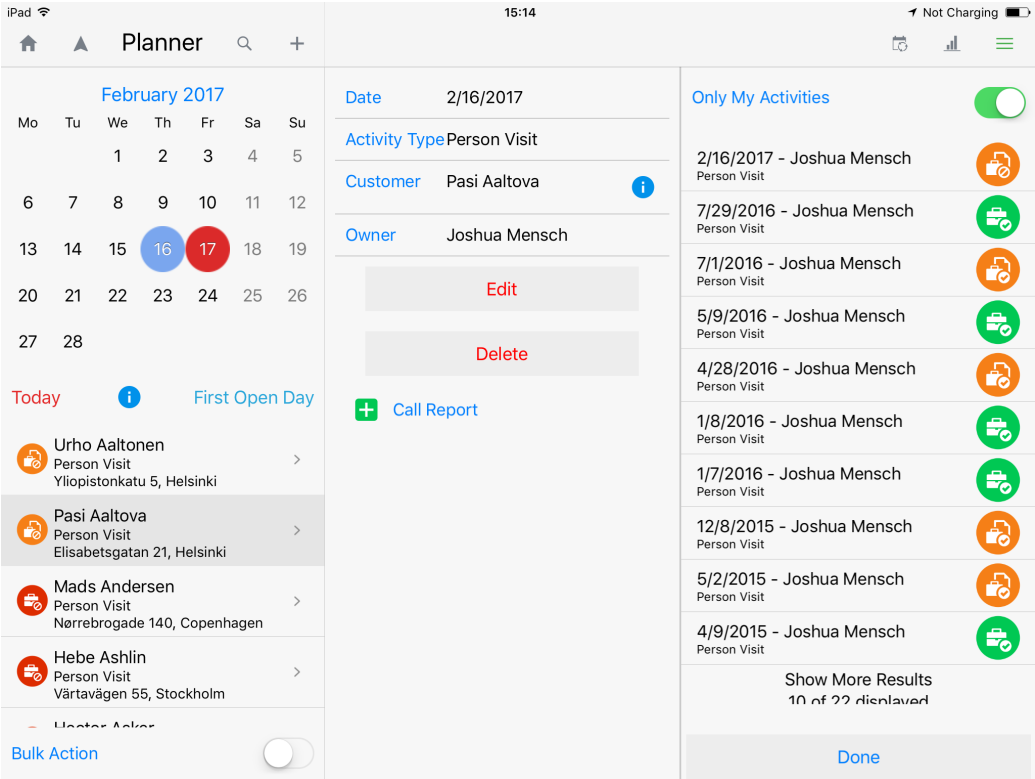
2. HCP MANAGEMENT AND PROFILING – Search & Customer Cards (Search Module)



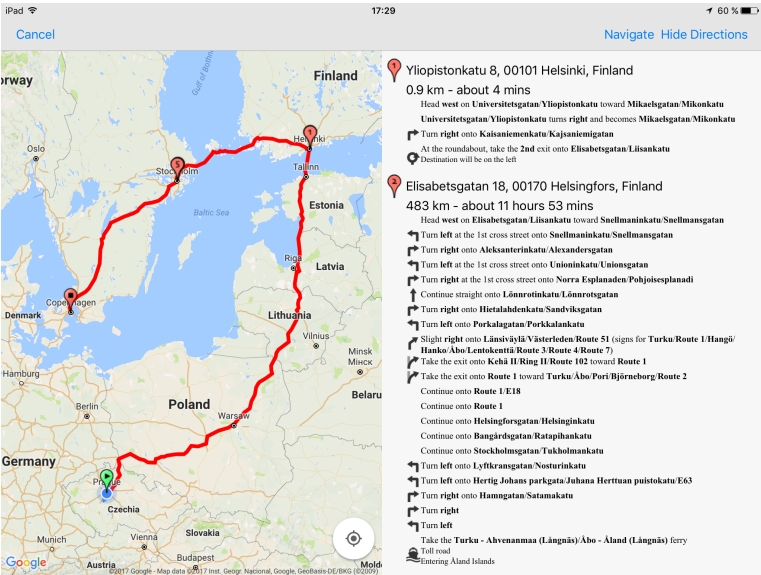
SEARCH allows reps to find client contacts quickly and review detailed info about customers, including profiles, interaction histories, financial investments, orders, and much more.



3. ACTIVITIES AND NAVIGATION – Activity, Route, and Pre-Call Planning (Planner Module)



PLANNER allows reps to plan and report a virtually unlimited range of activities, each with its own workflows and reporting requirements, according to your company's demands.



3. ACTIVITIES AND NAVIGATION – Activity, Route, and Pre-Call Planning (Planner Module)

- Supports a virtually unlimited range of activity types each with their own unique workflows and reporting processes
- Includes a monthly calendar, daily activity list, cycle plan view, route maps, direct access to customer information (full customer card view), built-in analytics (activity overviews and statistics), all within a dynamic interface that adjusts according to selected conditions.

iPad 15:15 Not Charging

Planner

February 2017

Mo Tu We Th Fr Sa Su

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28

Today First Open Day

Urho Aaltonen
Person Visit
Yliopistonkatu 5, Helsinki

Pasi Aaltova
Person Visit
Elisabetsgatan 21, Helsinki

Mads Andersen
Person Visit
Nørrebrogade 140, Copenhagen

Hebe Ashlin
Person Visit
Värtavägen 55, Stockholm

Bulk Action

Date 2/16/2017

Activity Type Person Visit

Customer Mads Andersen

Owner Joshua Mensch

Save

Report Call

Delete

Assigned Values Only

Sales Orientation

Primary Product Product A

Primary Product Tier ST

Secondary Product Product B

Secondary Product Tier T1

Treatment Adoption Zone Consults

Decision Orientation Commercially Oriented/Service Oriented

Competitive Positioning Treats Narrowly

Cooperation Agreed? Yes

Cycle Plan

Tier (Current Cycle) T3

Rx - Person Profile

Done

iPad 15:16 Not Charging

Planner

February 2017

Mo Tu We Th Fr Sa Su

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28

Today First Open Day

Urho Aaltonen

Date 2/16/2017

Activity Type Person Visit

Customer

Owner Joshua Mensch

Save

Done

Meeting (Internal)

Obstacle (Employee)

Other

Person Visit

Seminar

Training

Unpaid Leave

4. TARGET MANAGEMENT – Setting & Achieving FF Business Goals (Cycle Plan + Planner Modules)

- Allows FF users to plan period-specific campaigns with structured plans for sales and in-field marketing.
- Supports bulk planning of customer visits based on customer rating and frequency targets, as well as the rep's total call capacity within a defined period.
- Users can easily schedule visits in the Planner by dragging & dropping Cycle Plan customers onto the Calendar.
- Cycle Plan view in the Planner tracks goal fulfillment as the business cycle progresses

Cycle Plan				
Enter search query				
Cycle	Month 2017-03 - C...	1/3/2017 - 3/31/2017	Editable until 2/26/2017	Status: Opened
	Copenhagen HQ - Supplier Torvegade 47, Copenhagen	Current Tier	T3	Proposed Tier
		Current Frequency	1	Proposed Frequency
		Comment		
	Copenhagen-Pharmacy 4 Nørrebrogade 140, Copenhagen	Current Tier	T3	Proposed Tier
		Current Frequency	1	Proposed Frequency
		Comment		
	Edling Asplund Hantverkargatan 2, Stockholm	Current Tier	T3	Proposed Tier
		Current Frequency	1	Proposed Frequency
		Comment		
	Hebe Ashlin Värtavägen 55, Stockholm	Current Tier	T3	Proposed Tier
		Current Frequency	1	Proposed Frequency
		Comment		
	Hector Asker Karlplan 13, Stockholm	Current Tier	T3	Proposed Tier
		Current Frequency	1	Proposed Frequency
		Comment		

Show only current changes

Save

Planner	
Enter search query	
Cycle	Month 2017-02 - Cam...
1/2/2017 - 2/28/2017	Status: Approved
	Copenhagen HQ - Supplier Torvegade 47, Copenhagen
	Copenhagen-Pharmacy 4 Nørrebrogade 140, Copenhagen
	Edling Asplund Hantverkargatan 2, Stockholm
	Hebe Ashlin Värtavägen 55, Stockholm
	Hector Asker Karlplan 13, Stockholm
	Hedda Aslin Klarabergsgatan 64, Stockholm
	Heddi Asp Sankt Eriksplan 4, Stockholm
	Helsinki-Pharmacy 1 Elisabetsgatan 21, Helsinki
	Helsinki-Pharmacy 2 Elisabetsgatan 21, Helsinki

Bulk Action

Show Only Remaining Customers

PLAN period-specific campaigns with structured plans for sales and in-field marketing.
Cycle Plan transforms target lists into firm commitments based on customer frequency goals.

4. TARGET MANAGEMENT – Setting & Achieving FF Business Goals (Cycle Plan + Planner Modules)

- The Cycle Plan represents the plan of a specific Rep for his/her customer **Target Group** within a Cycle
- A Target Group is defined as a sub-set of customers in a Rep's database that (typically) represents the individuals with the **highest potential** for generating sales
- The size of the Target Group reflects the **call capacity** of a Rep within a given Cycle ($nTG \times \text{Total Frequency} = \text{Call Capacity}$)
- A Cycle is a configurable **business period** – it can be a calendar month, business quarter, or other
- Changes made to a Cycle Plan for one period (e.g. C1), once approved, are automatically inherited by the Cycle Plan for all subsequent periods (e.g. C2, C3, etc.) until changed again
- Changes made to the Frequency and Tier of a specific customer, once approved, become permanent regardless of their disagreement with the official Tier-Frequency correlation

The screenshot displays two mobile application screens. The top screen, titled 'Cycle Plan', shows a list of customers with their current and proposed tiers and frequencies. The bottom screen, titled 'Planner', shows a calendar view for February 2017 with a red dot indicating a call on the 16th. The bottom section shows a list of customers with their status and frequency.

Customer	Current Tier	Proposed Tier	Current Frequency	Proposed Frequency
Copenhagen HQ - Supplier	T3	T3	1	1
Copenhagen-Pharmacy 4	T3	T3	1	1
Edling Asplund	T3	T3	1	1
Hebe Ashlin	T3	T3	1	1
Hector Asker	T3	T3	1	1

Customer	Status	Tier	Frequency	RS
Copenhagen HQ - Supplier	S:0	T:1	NS:1	RS:0
Copenhagen-Pharmacy 4	S:0	T:1	NS:0	RS:1
Edling Asplund	S:0	T:1	NS:0	RS:1
Hebe Ashlin	S:0	T:1	NS:1	RS:0
Hector Asker	S:0	T:1	NS:1	RS:0
Hedda Aslin	S:0	T:1	NS:1	RS:0
Heddi Asp	S:0	T:1	NS:0	RS:1
Helsinki-Pharmacy 1	S:0	T:1	NS:0	RS:1
Helsinki-Pharmacy 2	S:0	T:1	NS:0	RS:1

5. REPORTING – Sample & Promo Drop Reporting (Warehouse Module)

- An easy, intuitive tool for Reps to record all samples, gifts, and promo goods given to customers
- Allows limits to be set on goods that can be distributed to customers in compliance with regulatory rules and company policies
- Keeps records on the location of all distributed goods as well as their costs for promo spend tracking and P&L analysis

In Stock Only	Brand	Karstoral	Product	Karstoral 90 mg
	SKU	SKU-11390029	Price	70.00 USD
	Expiration	3/23/2016	Quantity	0 / 4
Proneil	Brand	Obamoral	Product	Branded Pen
	SKU	SKU-387981	Price	0.00 USD
	Expiration		Quantity	1 / 6
Vigoral	Brand	Proneil	Product	Proneil 1 kg
	SKU	SKU-83KA08	Price	0.00 USD
	Expiration	3/23/2016	Quantity	0 / 1
Obamoral			Add	
			Summary	
Karstoral				
Putinoral				
Xofenal				

iPad

Warehouse

Σ

+

Date From

2/17/2017

2/17/2017

Target:

No. Items:

Transaction ID:

Type:

Urho Aaltonen

1

Are-2980-2017-33

Stock out

Date

2/17/2017

Transaction ID

Are-2980-2017-33

Transaction Status

New

Transaction Type

Stock out

Customer

Urho Aaltonen

Owner

Joshua Mensch

Product

SKU

Expiration

Amount

Branded Pen

SKU-387981

1

Edit

Submit

Delete

STOCK management for ensuring compliant distribution and use of samples and promotional goods, as well as keeping track of your promotional spend.

5. REPORTING – Expense Reporting (Expenses Module)

- An easy, intuitive tool for Reps to record cash advances and field expenses, from travel costs to business lunches
- Allows reps to report expenses by cost center and type, with no limits to the number of expense types supported
- Supports state management for multi-level approvals, which can be defined by cost center and expense type

Entry List

Date: 2/15/2017

Month 2017-02 (1/2/2017 - 2/28/2017)

2/15/2017 -56.00 / +56.00

Type: Rental and Accom...
Cost Center: Epiferox
Amount: -56.00 USD

Type: Debit Card (ASM)
Amount: +56.00 USD

Date: 2/15/2017

Type: Rental and Accommodation

Cost Center: Epiferox

Urho Aaltonen

Pasi Aaltova

Amount: 56.00 USD

Paid by Credit Card

Description: Lunch

Attachments: IMG_02172017105312.jpg

Entry List

Date: 2/15/2017

Month 2017-02 (1/2/2017 - 2/28/2017)

2/15/2017 -56.00 / +56.00

Type: Rental and Accom...
Cost Center: Epiferox
Amount: -56.00 USD

Type: Debit Card (ASM)
Amount: +56.00 USD

Date: 2/15/2017

Type: Rental and Accommodation

Cost Center: Epiferox

Urho Aaltonen

Pasi Aaltova

Amount: 56.00 USD

Paid by Credit Card

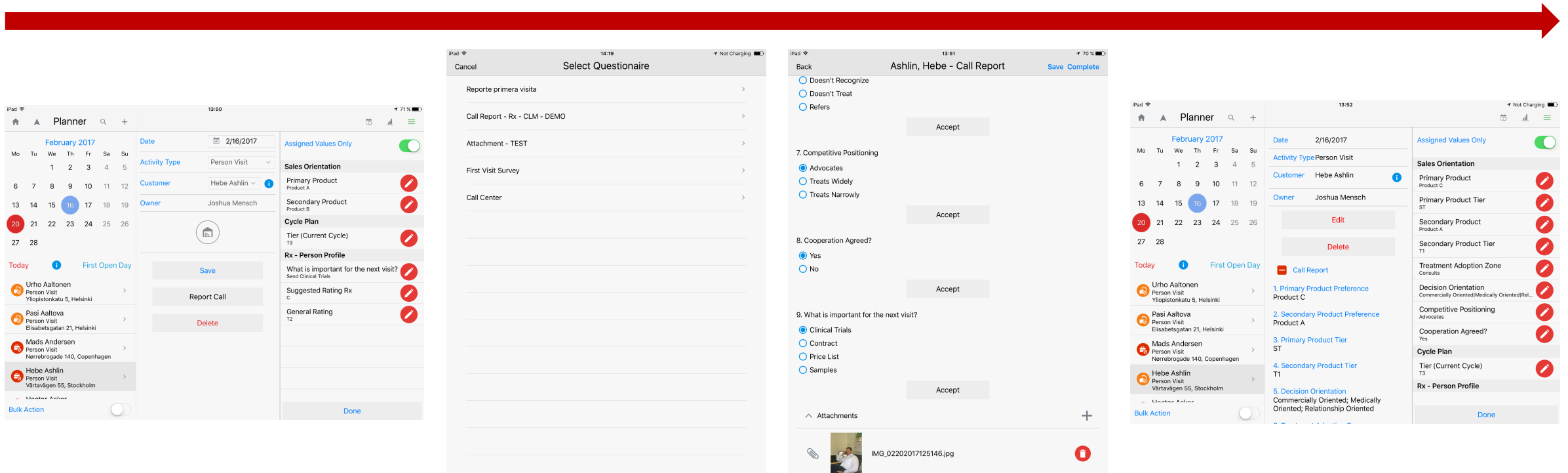
Description: Lunch

Attachments: IMG_02172017105312.jpg

EXPENSES are easily recorded and sent to accounting for real-time monitoring of field sales costs, supporting balanced, effective field sales budgets and timely reimbursements to reps.

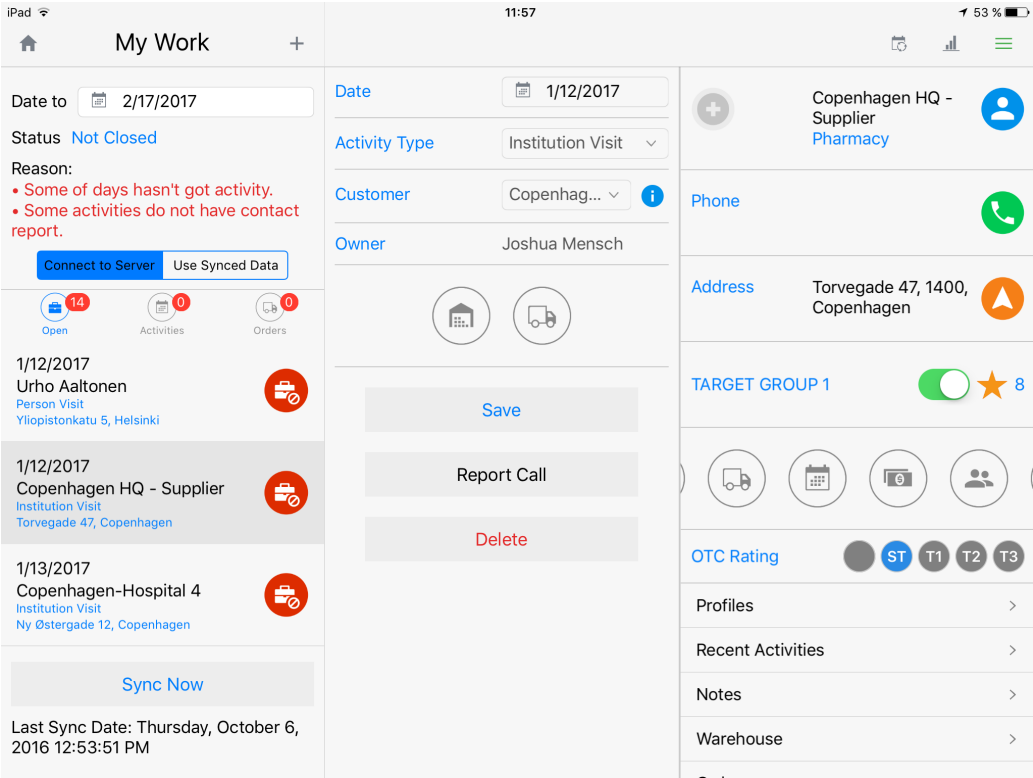
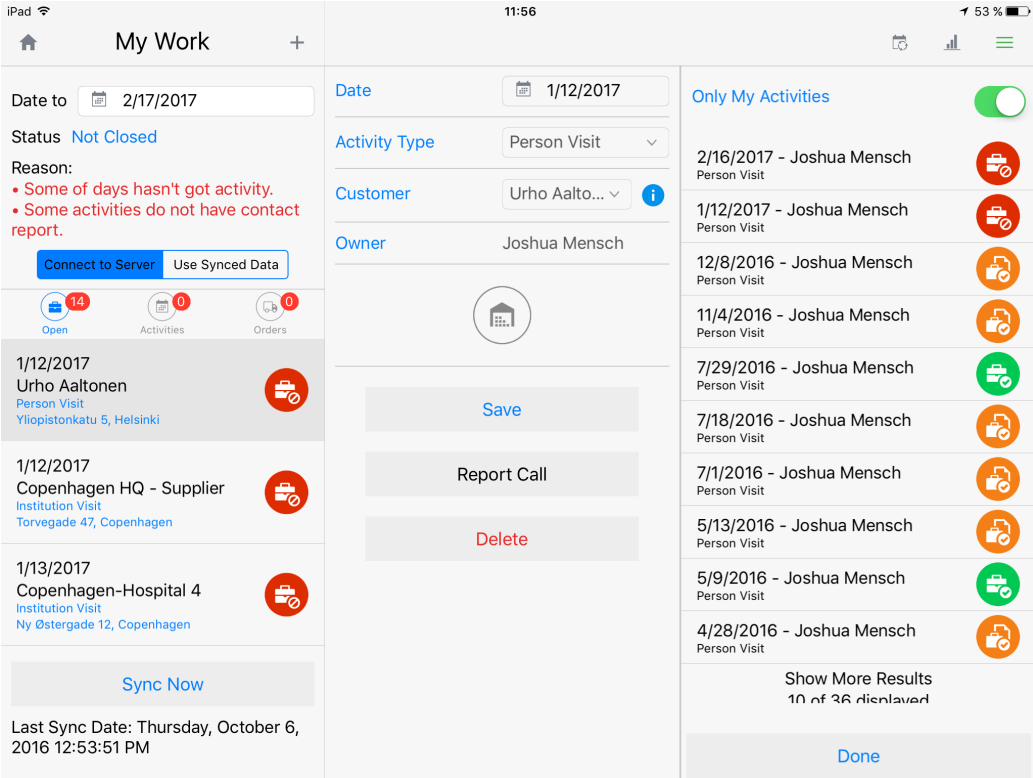
5. REPORTING – Call Reporting (Planner Module)

- Highly flexible approach allows for easy creation of multiple call report questionnaires that can be published simultaneously
- Supporting multiple question types, call reports can function as guided questionnaires, quickly satisfying complex reporting goals
- The system can automatically offer the most appropriate questionnaire according to customer status or relationship progress
- Questionnaires can capture data used across the system, such as profiles, which are automatically recorded based on answers



PROFILES are automatically captured and recorded during call reporting and stored in the Profiles section of the customer's card. **PHOTOS** can also be captured as evidence of visits.

6. MY WORK – (Tasks Module)



MY WORK puts all unfinished and pending tasks in one place, giving users the ability to quickly catch up on responsibilities – even when the device is offline – and complete their objectives for the day.

7. ORDER TAKING – Pharmacy Orders Made Easy (Orders Module)

- Template based, supporting a wide range of commercial conditions
- Allows reps to process multiple order types and apply variable discounts according to a wide range of balanced criteria
- Tracks the status of each order
- Supports multiple workflow scenarios (e.g. users can request orders directly from wholesalers and distributors, distribution managers in their own companies, or drop ordered goods directly) including different means of communicating order requests (email, XML, etc.)
- Supports the use of NIF codes and other identifying data
- Orders can be exported to ERP and other back office systems (e.g. SAP, JDE, etc.) for internal processing and records compliance

Orders	
Date from	2/15/2017
2/15/2017	
Institution	Copenhagen-Hos...
Distributor	Morrisons
Order Template	Transfer Order wit...
Total	8894.25 USD
Owner	Dr. Joshua Mensch
Status	Sent
Brand	Cezarin
Product	CROSS-SELL 2
Price	59.61 USD
Amount	17
Discount	2
Paid/Fre...	0
Brand	Gotex
Product	EPIFEROX
Price	29.73 USD
Amount	85
Discount	3
Paid/Fre...	0
Brand	Actaflex
Product	MELIUSUM
Price	67.70 USD
Amount	33
Discount	4
Paid/Fre...	0
Edit	
Add Item	
Summary	

ipad 12

17:29

60 %

Orders

▼ +

Date from

2/15/2017

2/15/2017

Institution

Distributor

Order Template

Total

Owner

Status

Copenhagen-Hos...

Morrisons

Transfer Order wit...

8894.25 USD

Dr. Joshua Mensch

Sent

Institution

Distributor

Order Template

Total

Owner

Status

Copenhagen-Hos...

Numark

Transfer Order wit...

5774.52 USD

Dr. Joshua Mensch

New

Date

2/15/2017

Institution

Copenhagen-Hospital 1

Blegdamsvej 9

Copenhagen

Order Number

170215-130527877_2980

Order Template

Transfer Order with CLM

Distributor

Morrisons

Distributor Code

Status

Sent

Total

8894.25 USD

Discount

512 USD

Net Value

8382.29 USD

Product

Amount

Discount

Price USD

CROSS-SELL 1

62

133.28

1904.02

CROSS-SELL 4

33

47.63

1190.64

EPIFEROX

63

56.19

1872.99

MELIUSUM

58

274.86

3926.60

7. ORDER TAKING – Pharmacy Orders Made Easy (Orders Module)

12:29

Not Charging

Orders

Date from2/15/2017

2/15/2017

InstitutionCopenhagen-Hos...

DistributorMorrisons

Order TemplateTransfer Order wit...

Total8894.25 USD

OwnerDr. Joshua Mensch

StatusSent

InstitutionCopenhagen-Hos...

DistributorNumark

Order TemplateTransfer Order wit...

Total5774.52 USD

OwnerDr. Joshua Mensch

StatusNew

BrandCezarin

Price59.61 USD

Discount2

ProductCROSS-SELL 2

Amount17

Paid/Fre...0

1013.37 USD

- 20.27 USD

BrandGotex

Price29.73 USD

Discount3

ProductEPIFEROX

Amount85

Paid/Fre...0

2527.05 USD

- 75.81 USD

BrandActaflax

Price67.70 USD

Discount4

ProductMELIUSUM

Amount33

Paid/Fre...0

2234.10 USD

- 89.36 USD

Edit

Add Item

Summary

17:29

60 %

Orders

Date from2/15/2017

2/15/2017

InstitutionCopenhagen-Hos...

DistributorMorrisons

Order TemplateTransfer Order wit...

Total8894.25 USD

OwnerDr. Joshua Mensch

StatusSent

InstitutionCopenhagen-Hos...

DistributorNumark

Order TemplateTransfer Order wit...

Total5774.52 USD

OwnerDr. Joshua Mensch

StatusNew

Date2/15/2017

InstitutionCopenhagen-Hospital 1
Blegdamsvej 9
Copenhagen

Order Number170215-130527877_2980

Order TemplateTransfer Order with CLM

DistributorMorrisons

Distributor Code

StatusSent

Total8894.25 USD

Discount512 USD

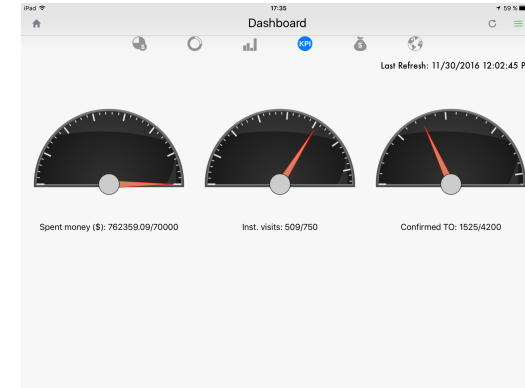
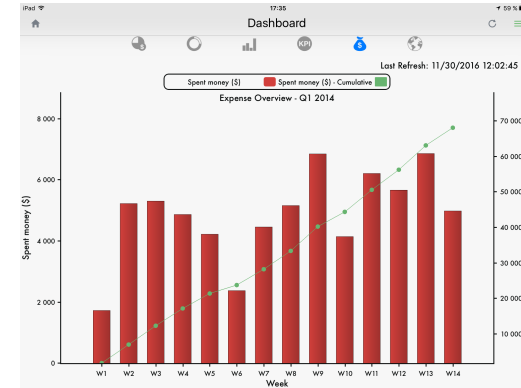
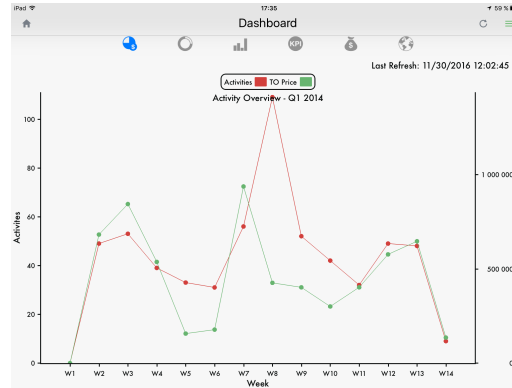
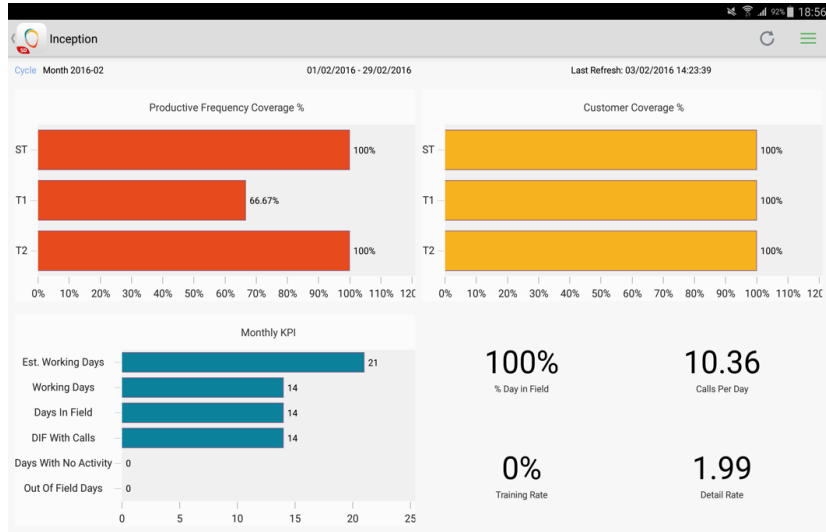
Net Value8382.29 USD

Product	Amount	Discount	Price USD
CROSS-SELL 1	62	133.28	1904.02
CROSS-SELL 4	33	47.63	1190.64
EPIFEROX	63	56.19	1872.99
MELIUSUM	58	274.86	3926.60

ORDER pharmacy stock right at the point of sale, applying the commercial conditions you need to close the deal – from discounts and rebates to free pieces – in a secure, compliant manner.

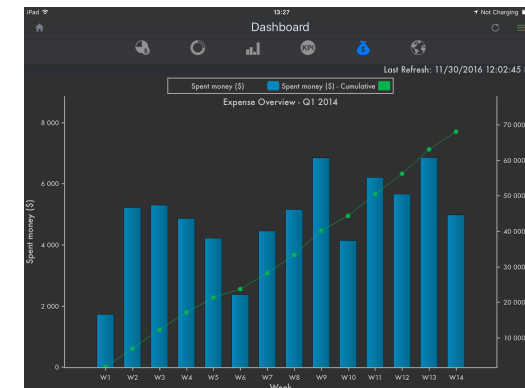
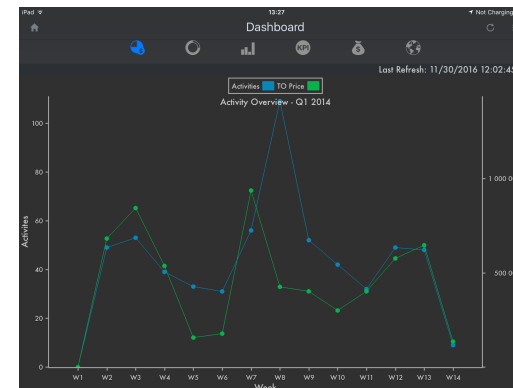
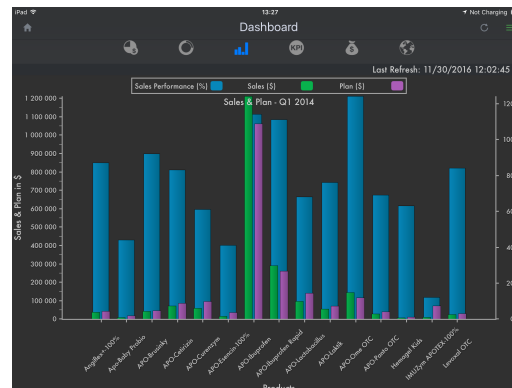
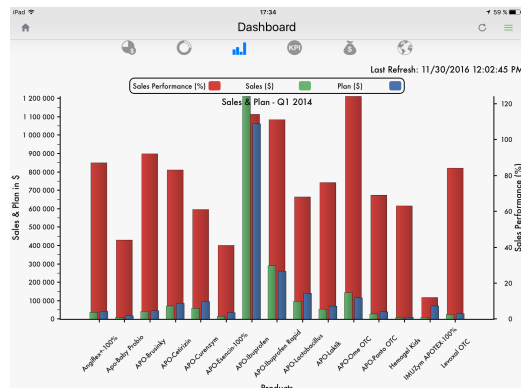
8. ANALYTICS – In-App Dashboards & Analytics + Online Dashboards and Reports

- The CRM apps themselves built-in dashboard module, activity analytics in other modules like search, customer cards and planner.
- Fully leverages the features of MS Reporting Services 2016 for both dashboards and paginated web and export reports
- It emphasizes bespoke approach in addition to standard out-of-the-box reports and KPI's



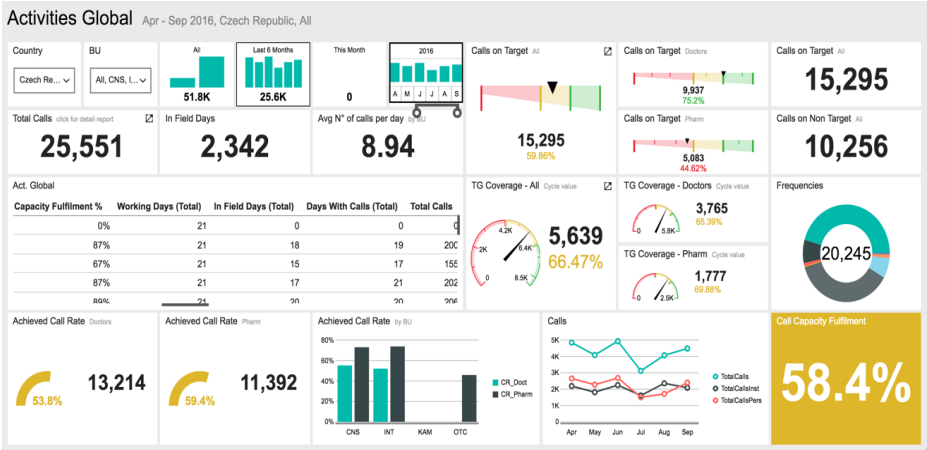
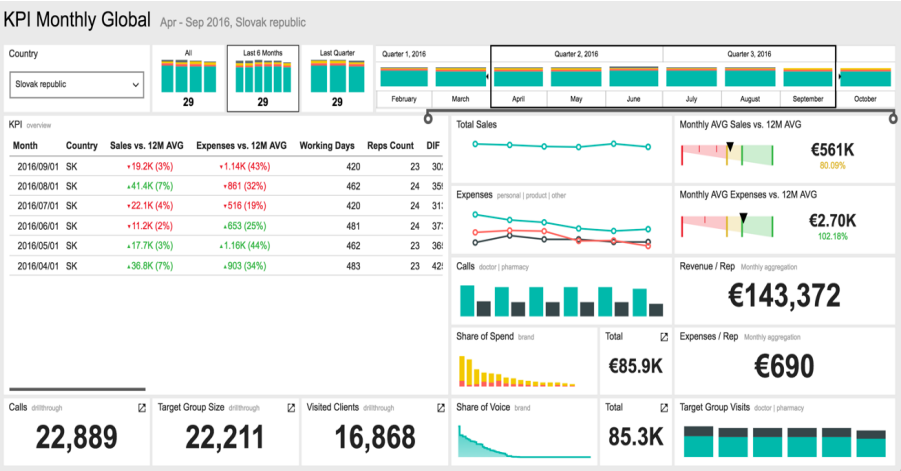
TRACK key performance indicators & results with interactive dashboards that can correlate data from multiple sources.

*In-App
Dashboards
Examples*

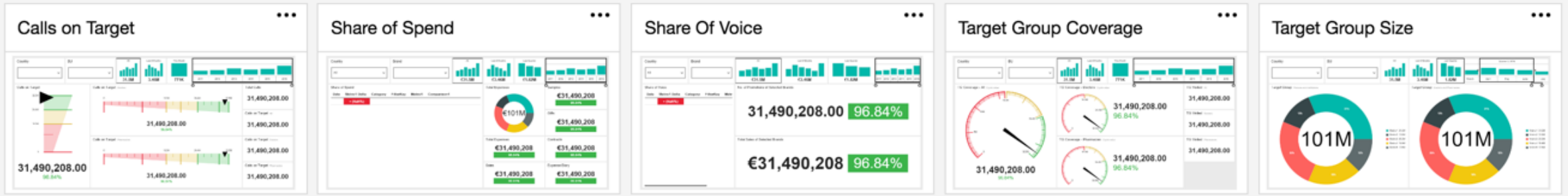


8. ANALYTICS – In-App Dashboards & Analytics + Online Dashboards and Reports

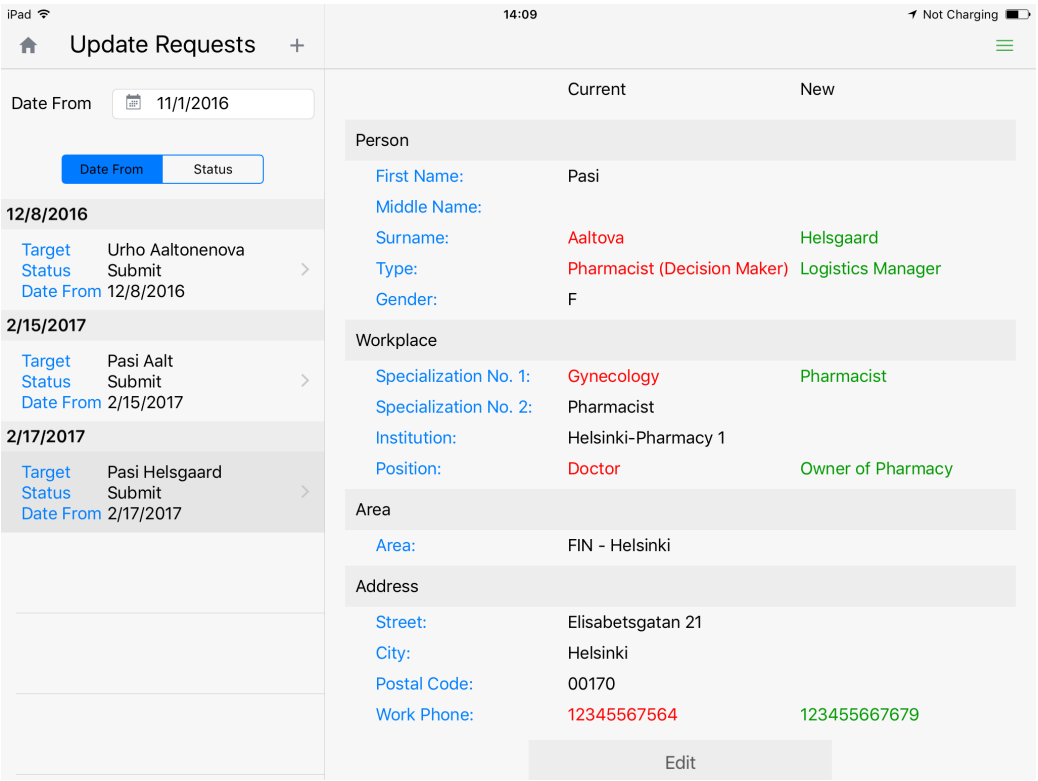
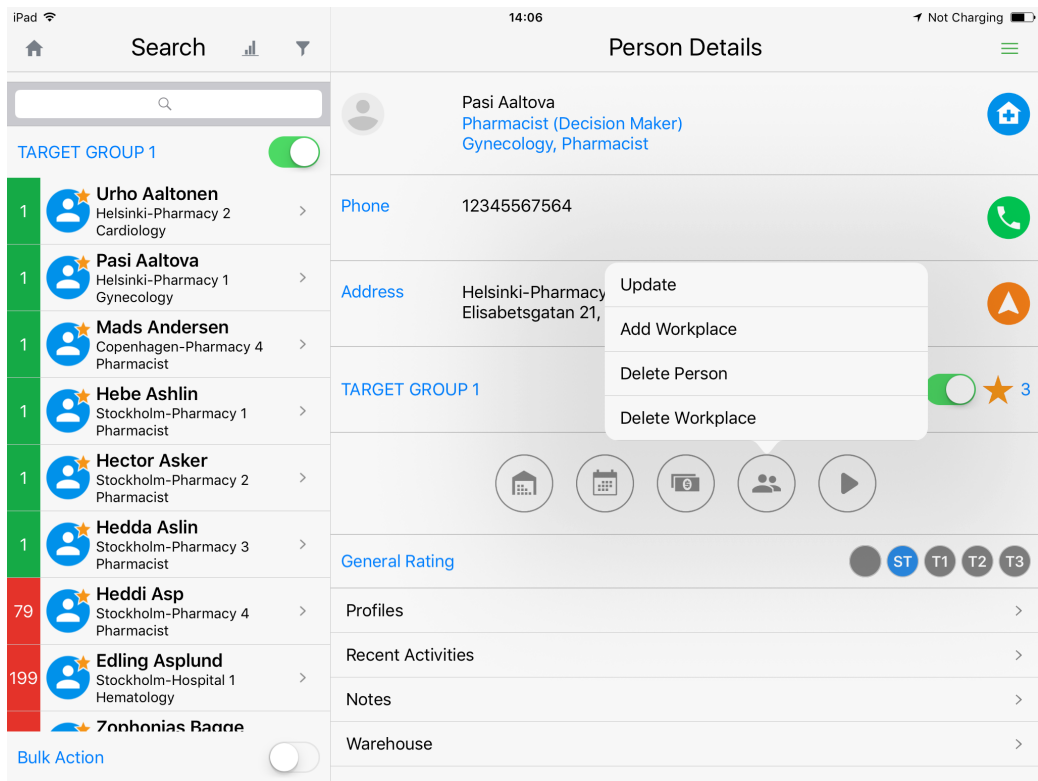
Business Intelligence Online is Inception CRM’s comprehensive *Business Intelligence Suite* that include both classic dashboards and richly detailed tabular reports that support an extensive set of parameters drawn from multiple data sets and intuitive drilldown capabilities for insights based on deep data analysis.



Leveraging the power and graphic capabilities of Microsoft’s latest analytics suite (MS Reporting Services 2016), *BI Online* is a modern, continuously updated portal that incorporates **KPIs, Mobile Reports, Paginated Reports, Excel and Power BI Desktop** files into a single Business Intelligence platform.



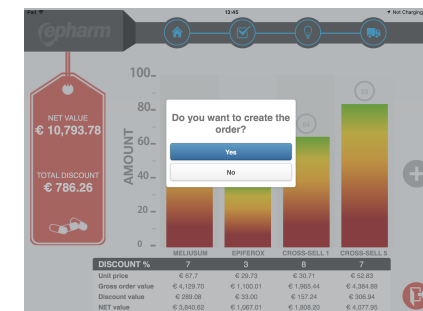
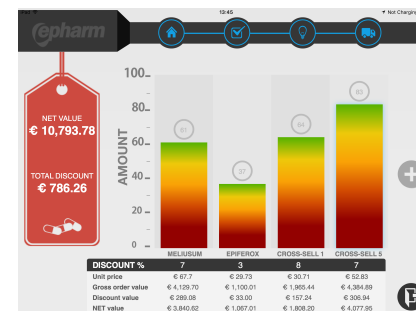
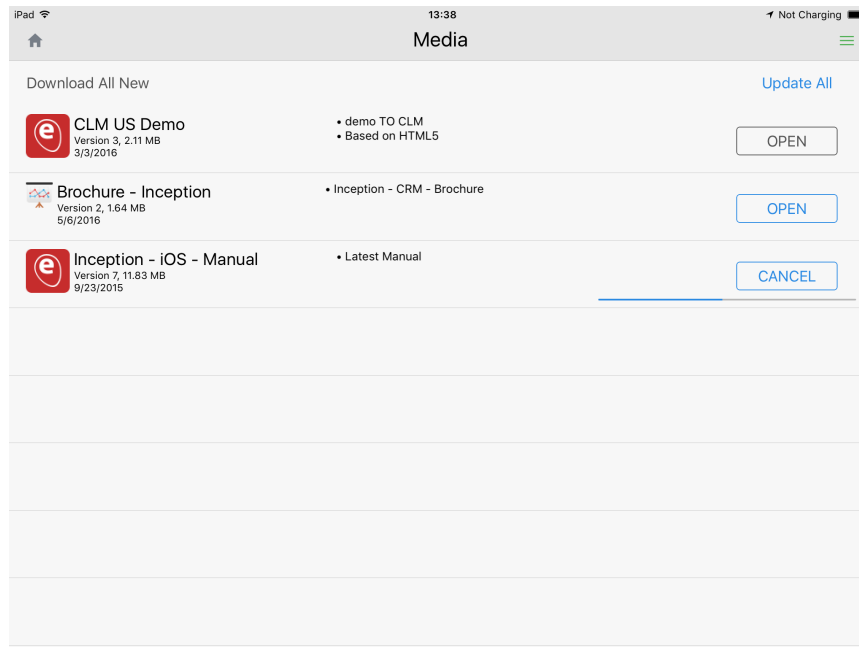
9. DATABASE MANAGEMENT – Updating Customer Information (Update Request Module)



UPDATE REQUESTS maintain the validity of customer information. Users can update customer data on the fly, with changes processed immediately or after validation, according to company policy.

10. CONTENT MANAGEMENT – Closed Loop Marketing (Media Module)

- 11. Reps can access only the *latest approved content*, including PDFs, MS Office Files, Videos, and HTML5 presentations.
- 12. A smart publishing engine allows HO to decide who can receive can use specific content, and in what context.
- 13. When used to streamline workflows and reporting, CLM presentations can be used to complete call reports, record sample/promo drops, and create orders.
- 14. BIAalytics integration supports robust data capture for management dashboards and drilldown reports.



MEDIA is a built-in “app store” and publishing engine that supports a wide range of multimedia content, from approved docs and training materials to promo videos and interactive HTML5 CLM presentations.

11. OTHER FEATURES – Settings & Tools

Settings

System Information

Server URL: https://vesbejg1.data3s.com/US/eluzzion.mobile
Application Version: 2017.1.0.4 (2017.1.0.4 DemoUS)
Database Version: 5
Database Size: 1.3 MB
Available Storage: 7.21 GB

Look & Feel

Select Theme: Dark Light

Display Names

How should the names of contacts be displayed? Print name Sort name

Active Target Group

Target Group: TARGET GROUP 1

Save

Support

Email: support@data3s.com

Reset

Reset All Content and Settings

Tools

Source Period: Destination Period:

Target Groups

Source: Destination:

Copy Data

Profiles

Profile Type: person

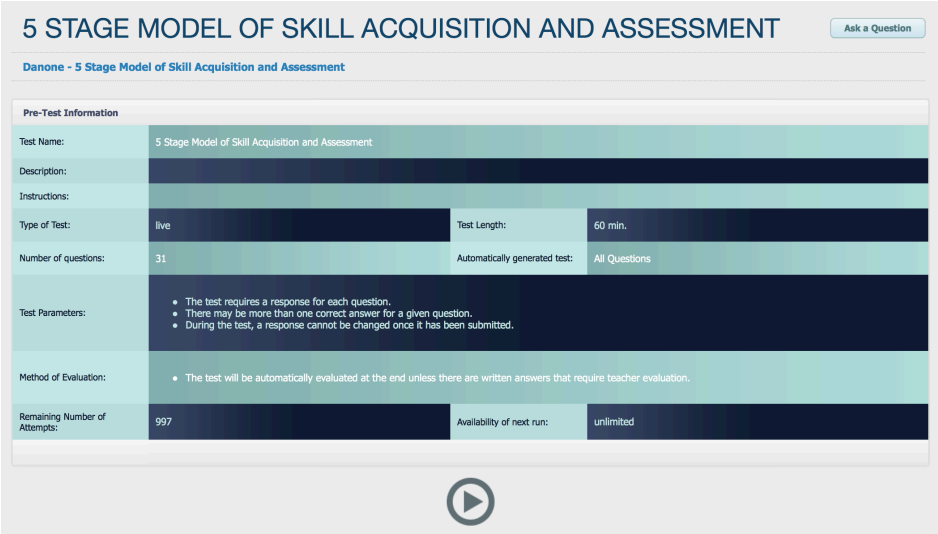
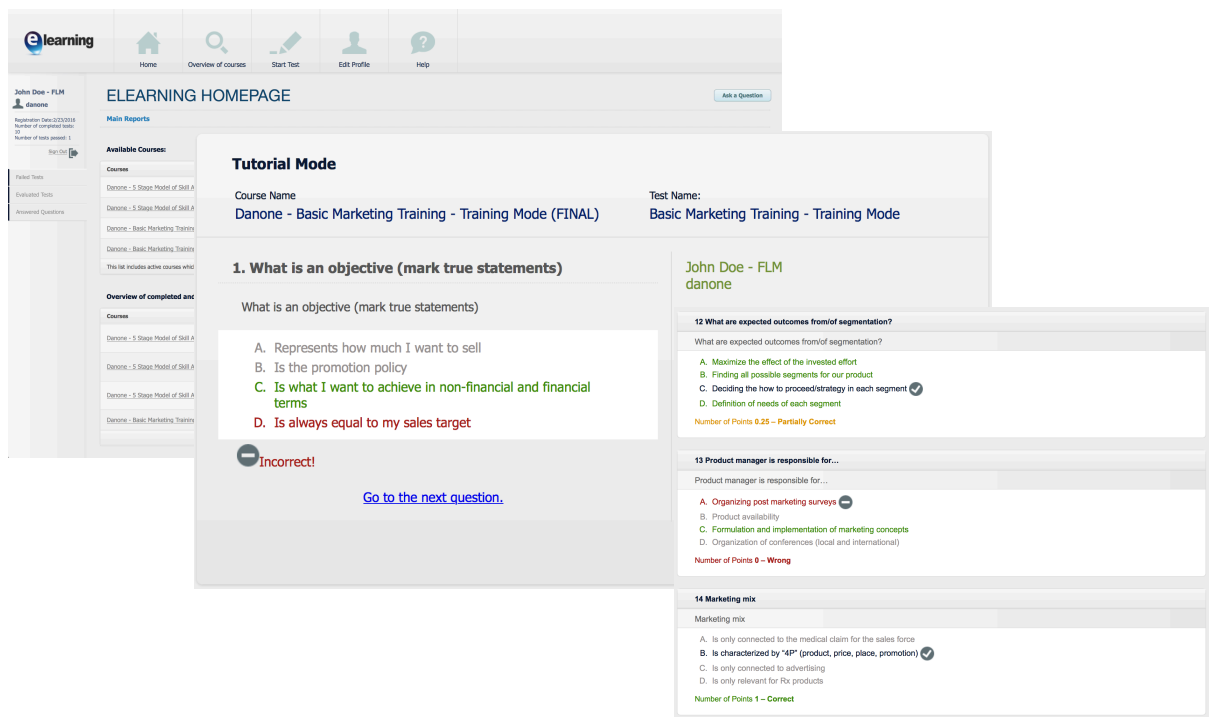
Source: Destination:

Copy Data

SETTINGS allow reps to personalize their app experience, from theme selection and name appearance to active target group selection, while **TOOLS** supports bulk operations such as target group cloning and group profile changes.

12. KNOWLEDGE & TRAINING MANAGMENT: eLearning (online app integrated with CRM core)

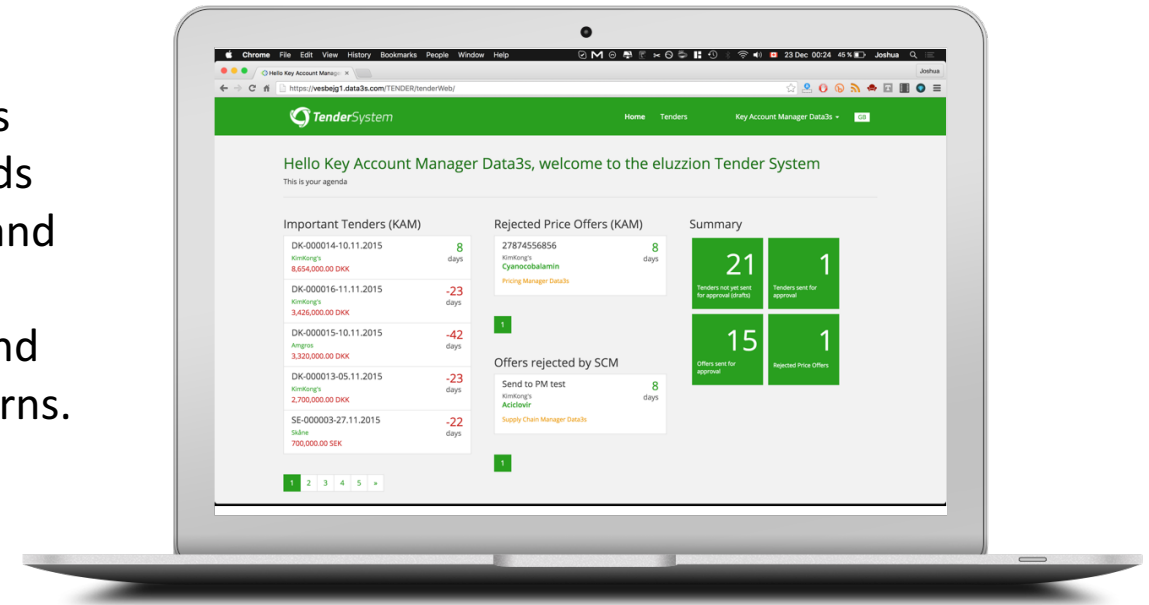
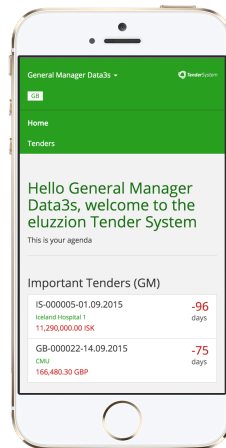
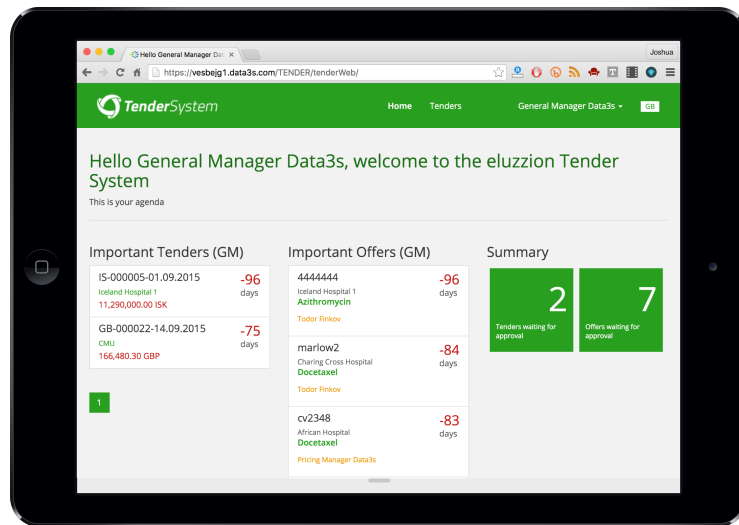
ELEARNING is an online training tool and Learning Management System (LMS) designed for advancing the professional growth of system users through guided self-study and flexible testing schedules, with comprehensive reporting for evaluation of progress and results.



ELEARNING makes training & educational activities simple, fast, and flexible. Training managers can easily create courses that include both training sessions and final exams – which the system can automatically evaluate for immediate feedback. Managers can also upload training materials relevant to each question on a practice test to help users study independently and make progress in their knowledge of each subject.

13. TENDER MANAGMENT: Tender Web (online app integrated with CRM core)

TENDER WEB is an online, role-based platform that allows tender teams collaborate on the preparation of tender bids and offers in real time. Supporting structured workflows and approval processes, account, supply chain, pricing and executive managers can quickly prepare successful bids and build knowledge for increased win rates as the system learns.



TENDER WEB is based on **real business intelligence** and **streamlines internal processes** so that competitive bids can be prepared and approved quickly from any device, and submitted early with the highest probability of success. When integrated with COGs data, the system is able to calculate the profitability of each offer before it is approved or submitted.