

TaskWise is an exciting innovation in business software that combines the vital functions of task management, relationship management, exception management and information sharing into a single company-wide system that integrates with your financial data! Its purpose is to enable you and your co-workers to work smarter and more efficiently with access to the information you need to do your job in an excellent way.

## CUSTOMER RELATIONSHIP MANAGEMENT

**TaskWise Start Page**

The start page displays 'Today's Tasks for DEMO' with a list of tasks categorized by type (Calls, Meetings, Appointments, To Do, Task, Tasks Due Today, Late Tasks, Tasks Next 7 Days, High Priority Tasks). It also includes an 'Alerts' section with a table:

| High | Normal | Low | Total |
|------|--------|-----|-------|
| 0    | 1      | 0   | 1     |

**Task List**

The task list is a table with columns: Sch Date, Time, Task Type, Reason, Relationship, Contact, Reference, P/Assign, Access, Create, Prio. It lists various tasks such as 'Call - Inbound Follow Up', 'Send Written Quote', and 'Project Planning Meeting'.

**Task Entry**

The task entry screen shows details for a task created on 12/07/01. It includes fields for Relationship (Lee County Health Care), Type (Outgoing), Reason (Send Written Quote), Contact (Dr. Grady Story, MD), and scheduled dates (Est Start: 07/03/04, Due Date: //, Act Start: 07/03/04, Compl Date: 00/00/00).

When you use TaskWise. . .

- Your customers and partners should get better service and followup
- Your management and staff can focus on task lists that show:
  - What needs to be done and why?
  - Who needs to be involved?
  - When does it need to be done?
- Your business exceptions and followups are identified, tracked, and resolved on-line:
- You're not forced to print a report and resolve issues off-line
- You don't have to wonder if an e-mail message has already been resolved
- You can manage your daily work through one convenient "portal" that provides access to all the programs in the SouthWare Excellence Series™
- Your other SouthWare Excellence Series modules become the "engine" that drives intelligent alerts and tasks and the means of completing tasks
- You can train new users much faster - they only need to know how to work from a department or personal "To Do" task list
- As you automate task and exception management your system continually grows smarter and your job becomes easier



## The TaskWise Vision

Imagine logging into your computer in the morning and seeing a summary of what's going on in the company. You click on a list of the tasks that have been assigned to you or your department. You take care of a couple of the items by clicking on a button to access the related financial software program for the task. You decide to forward one of the tasks to a co-worker and send an accompanying e-mail.

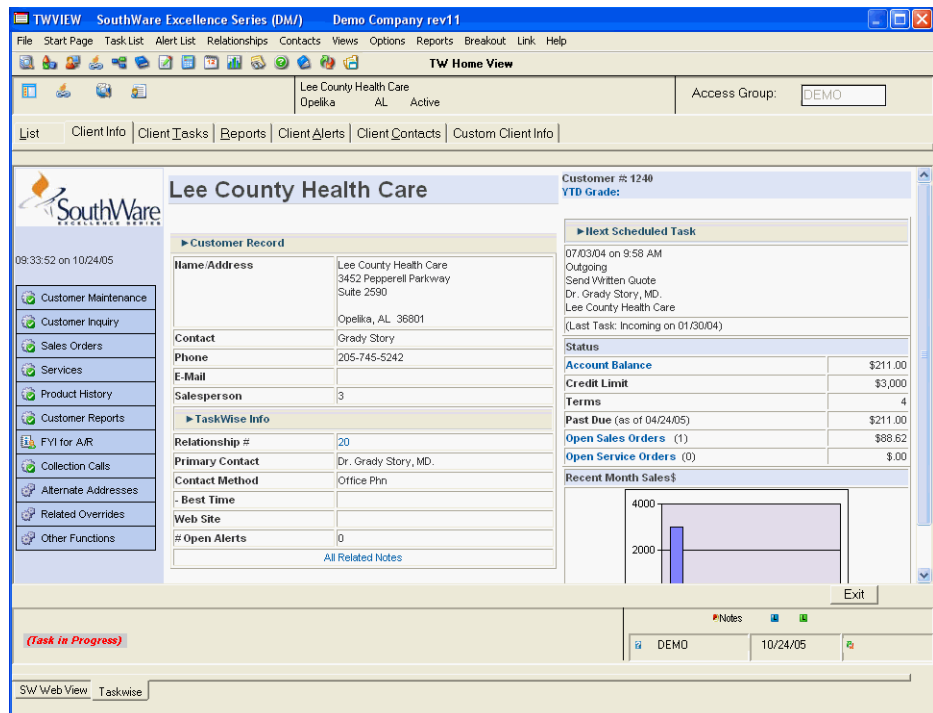
Next you check your department's alert list, situations that you told the system to watch for and give notification when they occurred. You zoom to the accounting data behind a couple of the alerts for more details. The alerts automatically created tasks for the responsible individuals so you don't need to take further action.

You return a couple of calls to clients and one to a vendor, make notes, and generate a couple of related e-mails and one followup task (with an RSVP so you'll automatically be notified when it's done). You're not sure about a company policy question during one of the calls so you look it up in the on-line AnswerReady database.

Later that morning you check the alert list again and see that all but one of the previous alert situations have been addressed but there are now two new ones. In the afternoon you continue to work your task list and zoom to supporting functions as needed. You add a new alert test so the system starts looking for a new potential problem that has come to your attention. You add a policy decision to the on-line database for future access by everyone.

At the end of the day you have the satisfaction of knowing that you worked on the right things and got a lot done. You also go home with the confidence that your system continues to work, looking for the issues that need your attention tomorrow.

The scenario above only touches on the vision of what you can do with TaskWise.



### Relationship View

#### Key Tools you'll have with TaskWise:

- Integrated Relationship & Contact Info- these are linked together in TaskWise and with all related business data in the SouthWare Excellence Series
- Task Scheduling/Management - scheduling, creation, forwarding, followup, closing options for tasks such as calls, appointments, to do items, etc.
- Alerts - the system can scan through any SouthWare data for any exception conditions you want to identify - option to generate related tasks for followup
- AnswerReady™ - reference database with search and an interactive Table of Contents
- Powerful Supporting Functions - Automated scripts with variable text, literature fulfillment, projects, task instructions, many more
- Optional Interface to Microsoft Outlook-- replicate data in Outlook
- Optional Internet Access to TaskWise data via NetLink™



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