

ExcelReport™

What are your goals for excellence and how do you measure them? Do your employees, customers and vendors perceive that your business has a commitment to excellence? You won't find these results in any other business software system. If you want excellence in your business, you need ExcelReport.

S O U T H W A R E E X C E L L E N C E S E R I E S >

BENEFITS

EXCELLENCE SERIES TOOLS

Period Trend

	PTD 12/31 2003	PTD 01/31 2004	PTD 02/28 2004	PTD 03/31 2004	PTD 04/30 2004	PTD 05/31 2004	PTD 06/30 2004
Quality		B	C+	C+	A-	A-	B
Financial	B	B	A-	B+	A-	B+	B+
Customer	A	C	C	C+	B+	A-	B
Vendor	A	B-	C+	B+	B	B	B
Employee		A	A-	A-	A	A-	A-
Future	F	C+	B-	B	B	C+	B

Start with a Summary Report

Customer Success Grading Zoom

Method	Value	Grade	Weight	Quality Pts
Sales Growth	999.3	A	1.0	4.0
Gross Profit / Sales	47.1	A	1.0	4.0
Cost Errors/Complaints / Soles	2	A	1.0	4.0
# Err/Complaints / # Invoices	5.5	A	1.0	4.0
Line Items Filled Immediately	100.0	A	1.0	4.0
Line Items Shipped On Time	100.0	A	1.0	4.0
Sales Orders Evaluated/Plated	7.4	A	1.0	4.0
- Avg. Excellence Rating	Score 1.9	A	1.0	4.0
Service Orders Evaluated/Plated	200.0	A	1.0	4.0
- Avg. Excellence Rating	Score 1.3	A	1.0	4.0
Avg. Partnership Rating	Score 2.0	A	1.0	4.0
Net Excel Points - All Events	Pts -2.0	B	1.0	4.0
Totals/Average Grade	G.P.A. 3.50	A-	12.0	42.0

Zoom Menu

- 1 - View Calc for Highlighted Grade
- 2 - View Events for Highlighted Grade
- 3 - View Customer Excel History
- 4 - View Customer Success Grading Scale
- 5 - Search Customers for Highlighted Grade

Zoom into a Grade

Enter selection criteria for Test Type

Condition: Sales Growth PTD: 05/31 2004

Test Type: Test Percent

Test Type

- 1 - Include All Grades
- 2 - Search Selected Grades
- 3 - Search Selected Grade Values

... and even Search Customer Grades

- Know instantly how well you are achieving your goals
- Remember and respond to errors, complaints, ideas
- Monitor and improve your customer, vendor, and employee relationships
- Measure and improve the quality of products and services
- Identify the sources of poor or outstanding performance
- Regularly remind your employees of the things important to your success
- Track your progress toward excellence by month or year

ExcelReport helps you set excellence goals, grade your progress, and train your people to excel. You get the tools you need to achieve excellence:

- A way to set goals for success
- Automatic analysis of your normal business processing
- A way to capture the non-financial information that is so important to your business
- An easily understood report card with grades to tell you how you're doing
- Complete ability to explore the reasons behind every grade



Features & Functionality

Success Report Card

- Six success factors
- Trend analysis
- GPA analysis
- Search grades for particular Customers, Vendors, Products, etc.
- See all details behind grades

Events

- Hot key instant entry
- Standard and user-defined types
- Relationship ratings
- Cost of Errors and Complaints
- Excel point estimate

Grading Factors

- User-maintained A-B-C-D-F grading scales
- Quality grades
- Financial grades
- Customer/vendor/employee grades
- Future preparation grades

Period History

- Dozens of excellence-related totals and statistics
- Per record per period for last 5 years
- Updated and accessible through other SouthWare modules

Questions you'll be able to answer include:

- Which areas of the business need attention?
- Are we making progress toward our goals?
- Are we able to fill customer's orders?
- Are we shipping orders on time?
- What's the average approval rating on sales orders?
- Which items are returned the most (poor quality)?

Type	Date	C?	P?	S?	V?	E?	Value
Emp Train	01/16/04			Y	P	1.0	\$500.7
Ratg-P/O	01/20/04	Y	Y		S	2.0	Most item
Error	01/20/04	Y	Y		P	-4.0	\$75 Perf
Error	01/24/04	Y	Y		P	-4.0	\$100 Shi
Thank You	01/31/04	Y			P	1.0	Thank y
Ext Effor	02/01/04			Y	P	3.0	Helped r
Ratg-Impr	02/01/04	Y			S	2.0	Works ef
Emp Train	02/02/04	Y			P	1.0	\$800 Nev
Ext Effor	02/03/04			Y	P	3.0	Week-en
Error	02/10/04	Y	Y	Y	P	-4.0	\$350 Wre
Idea/Sugg	02/18/04			Y	P	1.0	Give age
Idea/Sugg	02/20/04	Y			P	1.0	Have lon
Idea/Sugg	02/20/04			Y	P	1.0	Impleme
Emp Train	02/24/04	Y			P	1.0	\$300 Wo

Capture the Events that Impact Your Success

- How much are errors and complaints costing us?
- What do our customers think about us?
- Are we hitting our financial goals?
- Which vendors are giving us good service?
- What are the recent events involving this customer?
- Have we responded to all the ideas and suggestions we've received lately?
- How solid are our vendor relationships?
- Are our employees satisfied with their careers?
- How well are we preparing for the future?



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