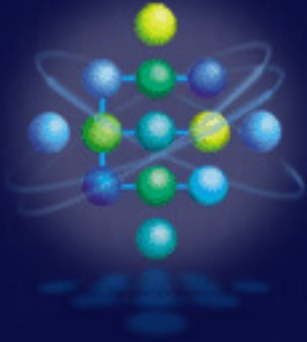


# Ecometry™

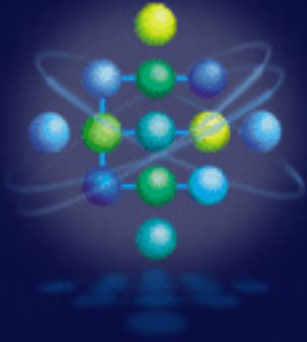
## Technology And Migration





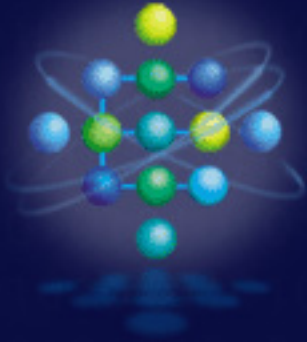
# Agenda

- Migrating your Ecometry system
  - Choosing the right platform
  - Planning the migration
  - Executing the migration
- Extending the life of your current system
- Technology Demonstration
- Migration Demonstration



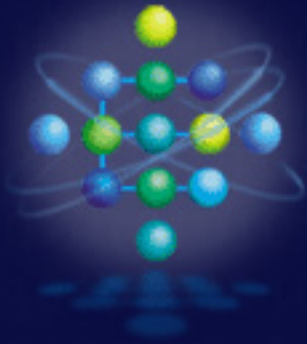
# Migrating Your Ecometry System

- Why?
- Platform Obsolescence
  - Costlier support
  - Technology application limits
- Ecometry technology is moving forward
- New platforms offer advantages
  - Lower cost of hardware and support
  - Configuration flexibility



# Migrating Your Ecometry System

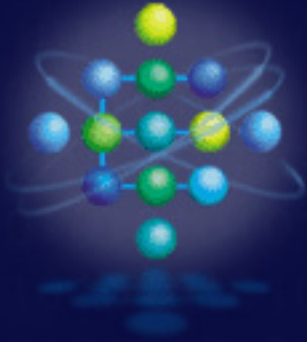
- When?
- Plan in 2002
  - Platform selection (UNIX or Windows)
  - Project sizing (hardware, people, process)
  - Training plan
- Execute in 2003
  - Hardware acquisition
  - Replicate environment (for training and test)
  - Test (validate data and process integrity)
  - Switch



# Choosing the Right Platform

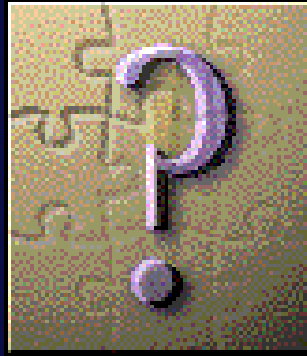
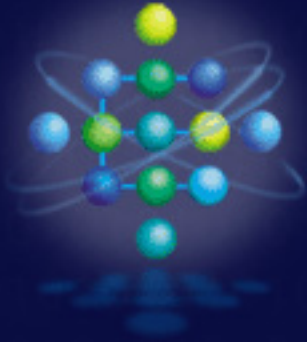
- Ecometry Functionality is Identical
  - HP e3000 Image
  - HP9000 Oracle
  - Windows 2000 Oracle
  - Windows 2000 SQL
- What is your in-house expertise?
- What is your budget?
- What other systems do you have?





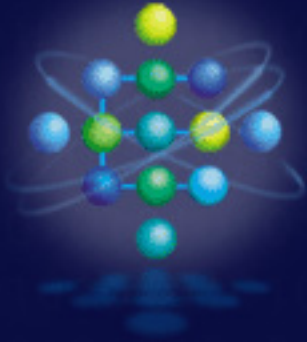
# Planning and Executing

- Where am I today?
  - Get an Audit of your system AND processes
- Create a project plan
  - Assign overall responsibility
  - Assess your capabilities vs. requirements
- Retain the right outside resources
  - Don't wait until they are all booked
- Test, Test and Test again



**How do I operate efficiently over the next year without spending money on soon-to-be-obsolete hardware?**

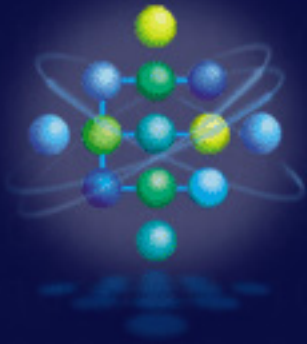




# Maximize Your Current System

- Grow your business, not your e3000
- Implement stepping stone upgrades
  - Ecometry functional decomposition
  - Data replication to Oracle and SQL
  - Add low cost servers to the enterprise
- Use new Ecometry tools
  - FVF (Full View Functionality)
  - Data mining
  - Parallel Web Shopper
  - E Mail Executive

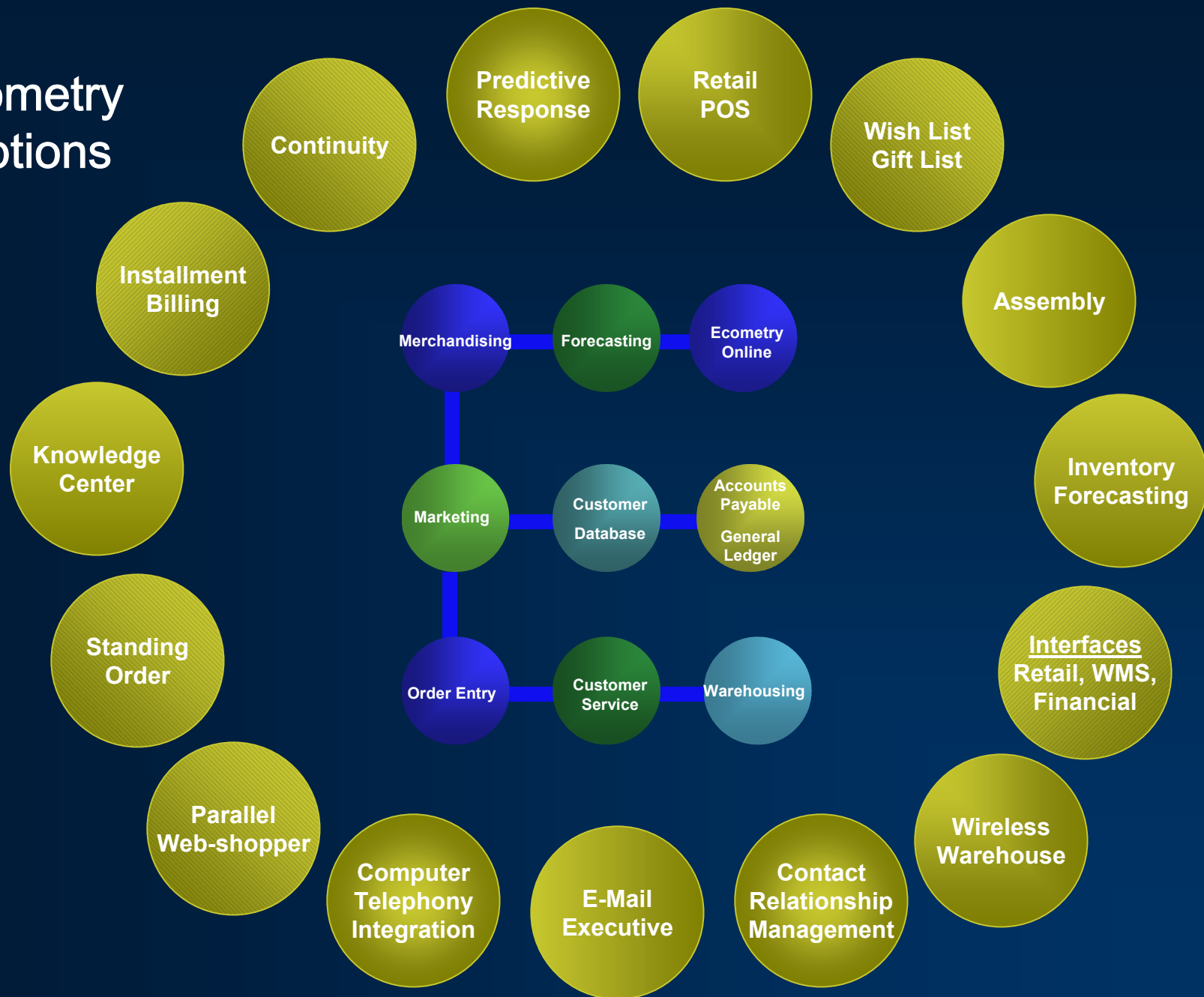




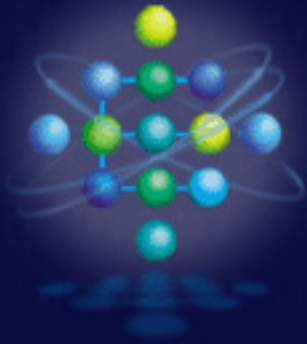
# Ecometry Application Suite



# Ecometry Options



Overview



# Multi Platform



**NT  
Oracle**

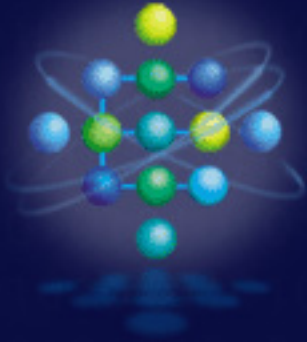


**HP3000  
Image**



**HP9000 Unix  
Oracle**

- Scalability for Extensive Growth (50 – 400,000 Orders/day)
- Built for OLTP Applications
- Maximum Price Performance
- ODBC Capabilities



# **Ecometry Technology Standards**

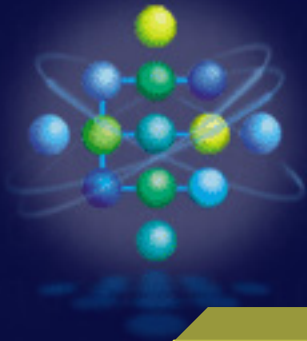
**XML - 3<sup>rd</sup> Party System Interfaces**

**Web based - User Interface**

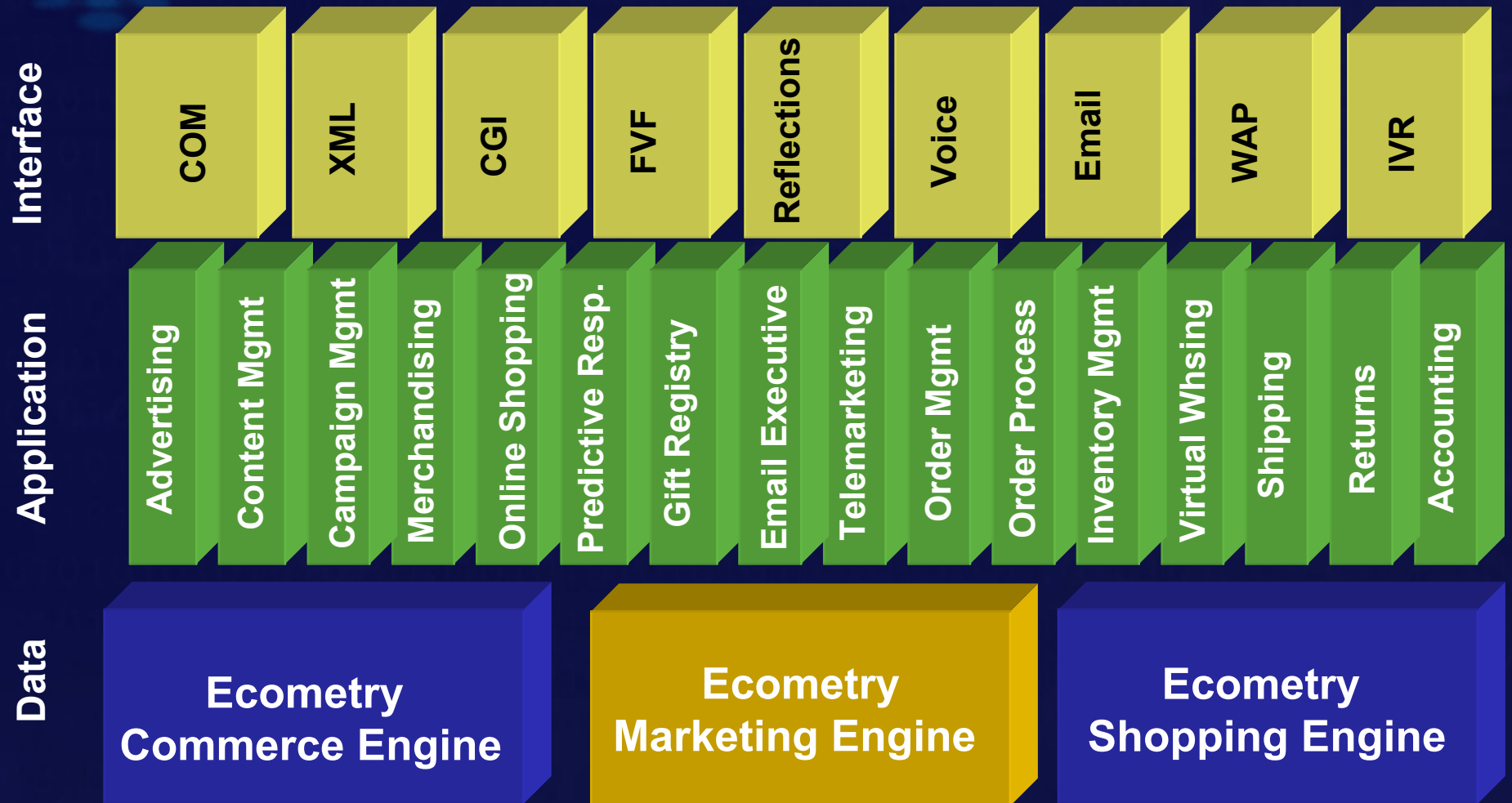
**Java and VB User Interfaces**

**Cobol Back Office Logic**

**Oracle and SQL Server Databases**



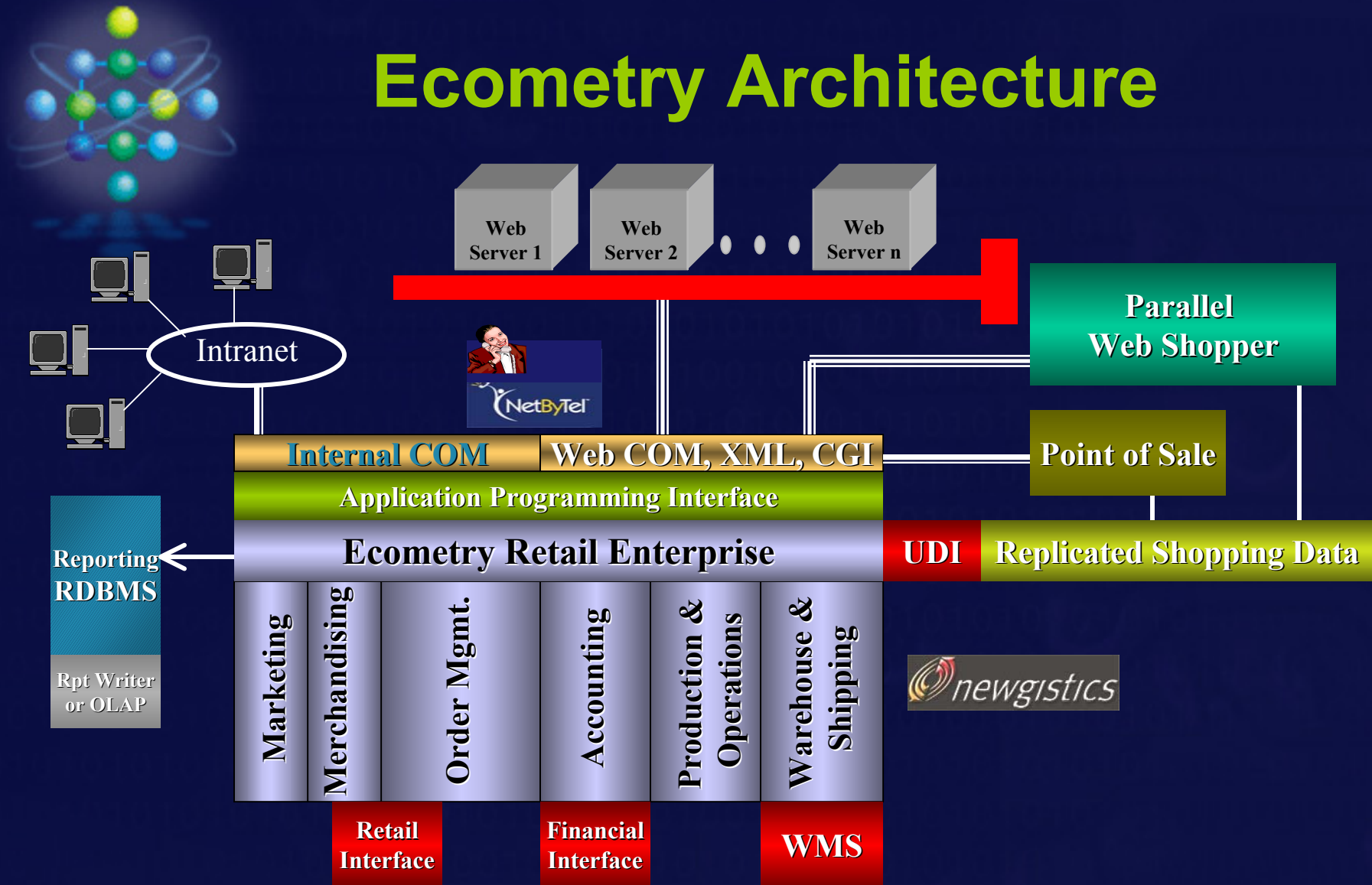
# Design Architecture

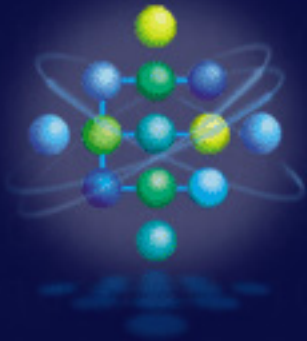


Technology

Ecometry™

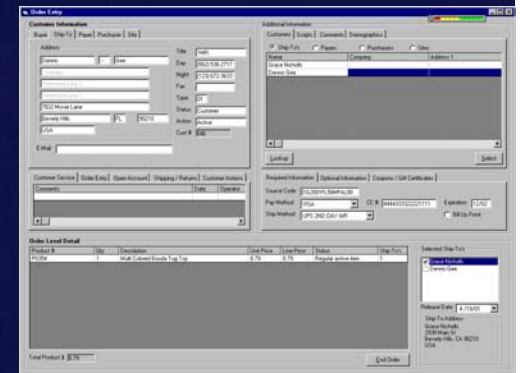
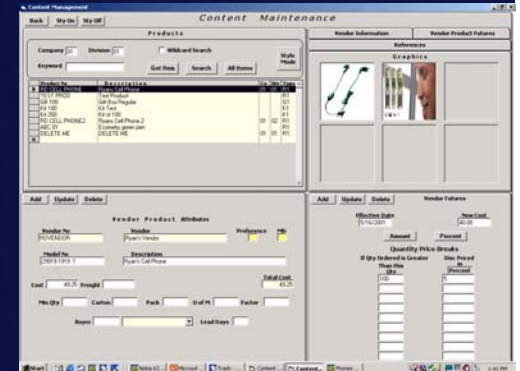
# Ecometry Architecture



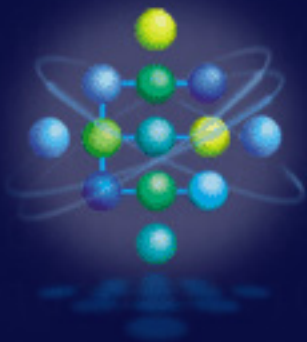


# FVF – More than a pretty new face

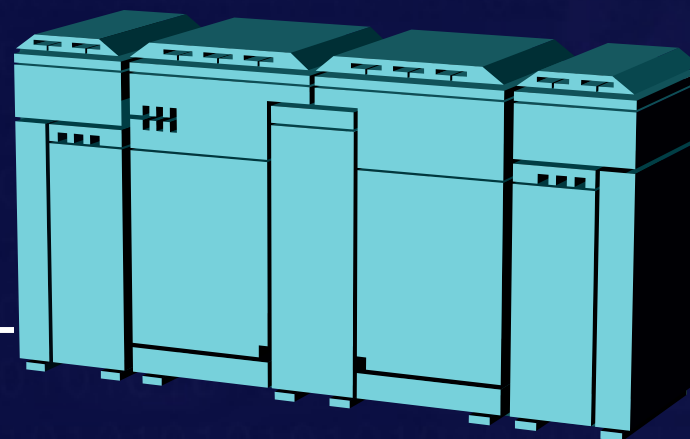
- Full View Functionality
- Increased Productivity
- Removes UI code from order engine
- Allows for an expanded enterprise architecture
- Simplifies Ecometry user licensing
- Simplifies many future modifications



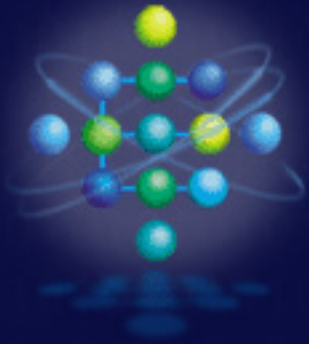




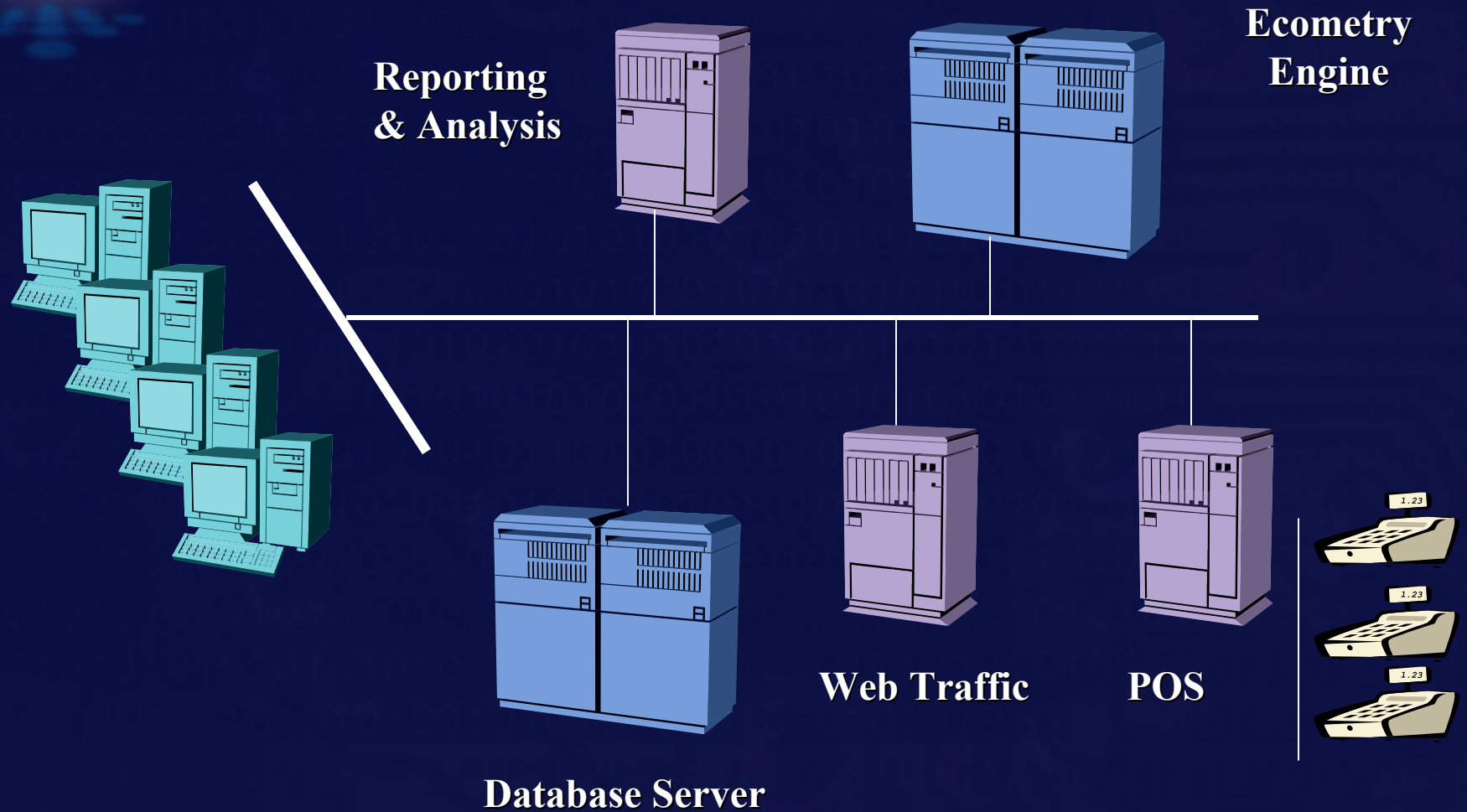
# Classic Ecometry



- HP e3000
- Order Processing
- Screen Drivers
- Web Traffic
- Reporting
- Database Server
- Batch Processing
- Point of Sale



# FVF and Optional Modules



Back

# Campaign Management

## *Campaign Development*

Campaign  
Maintenance

## *Offer Structure Definition*

Mode  
Definition

Period  
Definition

Type  
Definition

Version  
Definition

Wave  
Definition

Test Cell  
A  
Definition

Test Cell  
B  
Definition

## *Campaign Support Definitions*

Discount  
Code  
Definition

Discount  
Table  
Definition

Postage  
Handling  
Definition

Best  
Service  
Definition

## *Use Structure Definition*

Market  
Definition

List  
Definition

Segment  
Definition

Broker  
Definition

## *Campaign Analysis*

Graphic  
Analysis

Forecasting  
Analysis

Projection  
Curve  
Management

## *Promotion Management*

Auto  
Promotions

Selected  
Promotions

Segmentation  
Analysis

Distribution  
Definition

Distribution  
Analysis

## *Campaign Control*

Company  
Division  
Maintenance

Department  
Maintenance

Countries  
Maintenance

Content Management

Back

Sty On

Sty Off

Content Maintenance

Products

Company 01

Division 01

Wildcard Search

Keyword

Get Item

Search

All Items

Style Mode

Product No	Description	Co	Div	Type
RD CELL PHONE	Ryans Cell Phone	01	01	R1
TEST PROD	Test Product			R1
GB 100	Gift Box Regular			G1
Kit 100	Kit Test			K1
Kit 200	Kit of 100			K1
RD CELL PHONE2	Ryans Cell Phone 2	01	02	R1
ABC 01	Ecometry green pen			R1
DELETE ME	DELETE ME	01	01	R1

References

Vendor Information

Vendor No	Product No
RDVENDOR	RD CELL PHONE
TESTVEND	RD CELL PHONE
RDVENDOR	RD CELL PHONE
RDVENDOR	RD CELL PHONE

Graphics

Vendor Product Futures

Effect Date	Cost	Multi
5/16/2001	5	P

Update

Cancel

Prod Cd RD CELL PHONE

Desc Ryans Cell Phone

Type R1

Regular

Sub With RD CELL PHONE2

Ryans Cell Phone 2

Actual Product

How Many

Category Definition

Category 1	K	Electronics
Category 2	Z	Cell Phones
Category 3	3	Digital
Category 4		

Pricing

Price 125

Extra 2.25

Minimum Price 100

Tax Exempt GG

Exclude From Disc

Postage - Handling

Use Alternate

Exclude Y

Order Conditions

Minimum 1

Maximum 10

Restrict Ship D

Associate R

Physical Data

Weight 1

Length 12

Width 1

Depth 1

Shopping Control

Stop Date

Web Sort Rank 3

Image Override

Order Control

AutoHold A

Supress FTC N

Ack Wth Ltr

POS Dept

Shipping Information

Serial No Req Y

Auto Ck Off Y

Can Tariff Cd

Custom CD SPCU

No Demand Y

Royalty Cd

ShipMeth

Cubic Volume

Cust Required Y

Drop Ship A

Auto Purchase Y

Merchandiser

Merchandisers

Frght Cls 1000

FREIGHT CLASS CODE

DIM Weight

Omit Print

Cycle Weeks

Country Orig

Countries

Hazard Cd TR

Special 4th Cls Y

Warranty Days

Co Sharable Y

Reorder Pt

Promo Chain

Chains

Start

Ecometry Corp...

Microsoft Powe...

Content Manag...

Content Man...

1:01 PM

Content Management

Back

Sty On

Sty Off

Content Maintenance

Products

Company 01

Division 01

Wildcard Search

Keyword

Get Item

Search

All Items

Style Mode

Product No	Description	Co	Div	Type
RD CELL PHONE	Ryans Cell Phone	01	01	R1
TEST PROD	Test Product			R1
GB 100	Gift Box Regular			G1
Kit 100	Kit Test			K1
Kit 200	Kit of 100			K1
RD CELL PHONE2	Ryans Cell Phone 2	01	02	R1
ABC 01	Ecometry green pen			R1
DELETE ME	DELETE ME	01	01	R1
*				

Add

Update

Delete

Vendor Product Attributes

Vendor No

RDVENDOR

Vendor

Ryan's Vendor

Preference

Mfr

Model No

29919 1919 1

Description

Ryan's Cell Phone

Cost

49.25

Freight

Total Cost

49.25

Min Qty

Carton

Pack

U of M

Factor

Buyer

Lead Days

Vendor Information

Vendor Product Futures

References

Graphics

Add

Update

Delete

Vendor Futures

Effective Date

5/16/2001

New Cost

40.00

Amount

Percent

Quantity Price Breaks

If Qty Ordered is Greater Than this Qty

100

Disc Priced in Percent

5

Start

Nokia 63...

Microsof...

Trash - ...

Content ...

Content...

Phones ...

1:41 PM

Content Management

Content Maintenance

BackSty OnSty Off

Products

Company01Division01Wildcard Search

Keyword

Get ItemSearchAll Items

Product NoDescriptionCo Div Type

RD CELL PHONERyans Cell Phone

TEST PRODTTest Product

GB 100Gift Box Regular

Kit 100Kit Test

Kit 200Kit of 100

RD CELL PHONE2Ryans Cell Phone 2

ABC 01Ecometry green pen

DELETE MEDELETE ME

\*

References

Vendor Information

Vendor NoProduct No

RDVENDOR29919 1919 1

TESTVENDRD CELL PHONE

RDVENDOR29919 1919 1

RDVENDOR29919 1919 1

Graphics

Vendor Product Futures

Effect DateCostMulti

5/16/200140P

UpdateCancelProd CdRD CELL F

Sub WithRD CELL PHONE2

Actual Product

Category Definition

Category 1KElectronics

Category 2ZCell Phones

Category 33Digital

Category 4

Pricing

Price

Minimum Price

Tax Exem

Exclude From Disc

AssociateRDepth1

Shipping Information

Serial No ReqYAuto Ck OffYCan Tariff Cd

Custom CDSPCUCustom RequiredY

Drop ShipAYOmit PrintCo SharableY

ShipMethCubic Volume

Frght Cls1000FREIGHT CLASS CODEDIM Weight

Hazard CdTRSpecial 4th ClsYWarranty Days

Customization

No DemandY

Auto PurchaseY

Cycle WeeksCountry Orig

Reorder PtPromo Chain

Merchandising

Royalty Cd

MerchandiseMerchandisers

Countries

Chains

Choose Category Code

Category CodeData

APPAREL

COLLECTIBLES

FOOD

GARDEN

HOME FURN./DE

HOME OFFICE

JEWELRY

LIFESTYLE

TABLEWARE

TRAVEL

Electronics

CAT-1-L

CAT-1-M

CAT-1-N

CAT-1-O

APPAREL

Update DataExit

Physical Data

ht1

th12

th1

th1

Shopping Control

Stop Date

Web Sort Rank3

Image Override

Order Control

AutoHoldA

Supress FTCN

Ack Wth Ltr

POS Dept

How Many1

TypeR1Regular

Start

Microsoft P...

Re: Blue W...

Ecometry C...

Content Ma...

Content Ma...

Choose Ca...

2:02 PM

# Order Entry

## Customer Information

Buyer Ship-To Payer Purchaser Site

### Address

Dennis M Gee  
 Company  
 Reference Line 1  
 Reference Line 2  
 7832 Movie Lane  
 Beverly Hills FL 90210  
 USA

Title 1MR.  
 Day (562) 536-2717  
 Night (123) 672-3633  
 Fax  
 Type 01  
 Status Customer  
 Action Active  
 Cust # 646

E-Mail

Customer Service Order Entry Open Account Shipping / Returns Customer Actions

Comments	Date	Operator

## Order Level Detail

Product #	Qty	Description	Unit Price	Line Price	Status	Ship-To's
P0354	1	Multi Colored Booda Tug Toy	8.79	8.79	Regular active item	1

Total Product \$ 8.79

End Order

## Additional Information

Customers Scripts Comments Demographics

Ship-To's Payers Purchasers Sites

Name	Company	Address 1
Grace Nicholls		
Dennis Gee		

Lookup

Select

Required Information Optional Information Coupons / Gift Certificates

Source Code DG2001FL56MFAL00  
 Pay Method VISA CC # 4444333322221111 Expiration 12/02  
 Ship Method UPS 2ND DAY AIR Bill Up Front

### Selected Ship-To's

- ☒ Grace Nicholls
- ☐ Dennis Gee

Release Date 4 /19/01

Ship-To Address  
 Grace Nicholls  
 2938 Main St  
 Beverly Hills, CA 90210  
 USA



Customer Service

Customer Information

Buyer

Search

Update

First Name

MI

Last Name

Company

Reference Line 1

Reference Line 2

727 SIERRA FALLS DR

WESTON

FL

33327

USA

Title

Day

Night

Fax

Type

Status

Action

Cust #

E-Mail

Customer Service

Order Entry

Open Account

Shipping / Returns

Customer Actions

Comments

Date

Operator

Order Summary

Customer Orders

Order Recap

Order #	Order Date	Status	Last Shipment
P0000361	04/19/01	Partially Shipped	04/19/01
P0000344	04/17/01	Partial Backordered	
P0000343	04/17/01	Shipped Complete	04/17/01
P0000338	04/11/01	Reg Ord ready proces	

Ship-To Information

Name	Company	Address 1
Grace Nicholls		
Dennis Gee		

Action

Comments

Action	User	Date

Order Level Detail

Shipped on 04/19/01

Level Recap

Product #	Description	Qty	Price	Status
AE0048	Multi-Colored Wonder Toy	1	5.49	Regular active item

Level Actions

Order Actions

Level Comments

Order Comments

Action	User	Date
1Z1111ZE0200002205	PICKER	04/19/01
Package ID 0700000244 Box No 03		04/19/01
Order in Warehouse	PICKLOTS	04/19/01

Start

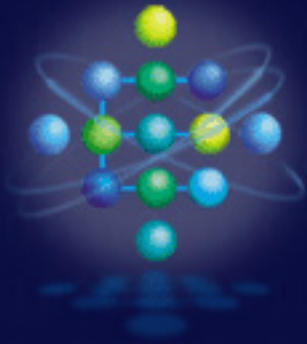
Microsoft Pow...

Condor.r1w - ...

C:\WCS\frmL...

Customer S...

11:02 AM

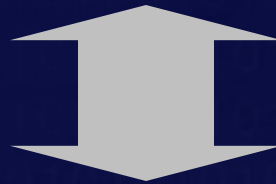


# Web Implementation

- CGI
- XML
- COM

Web  
Server

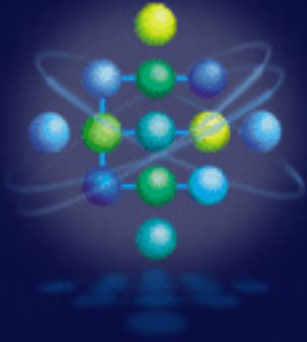
Firewall



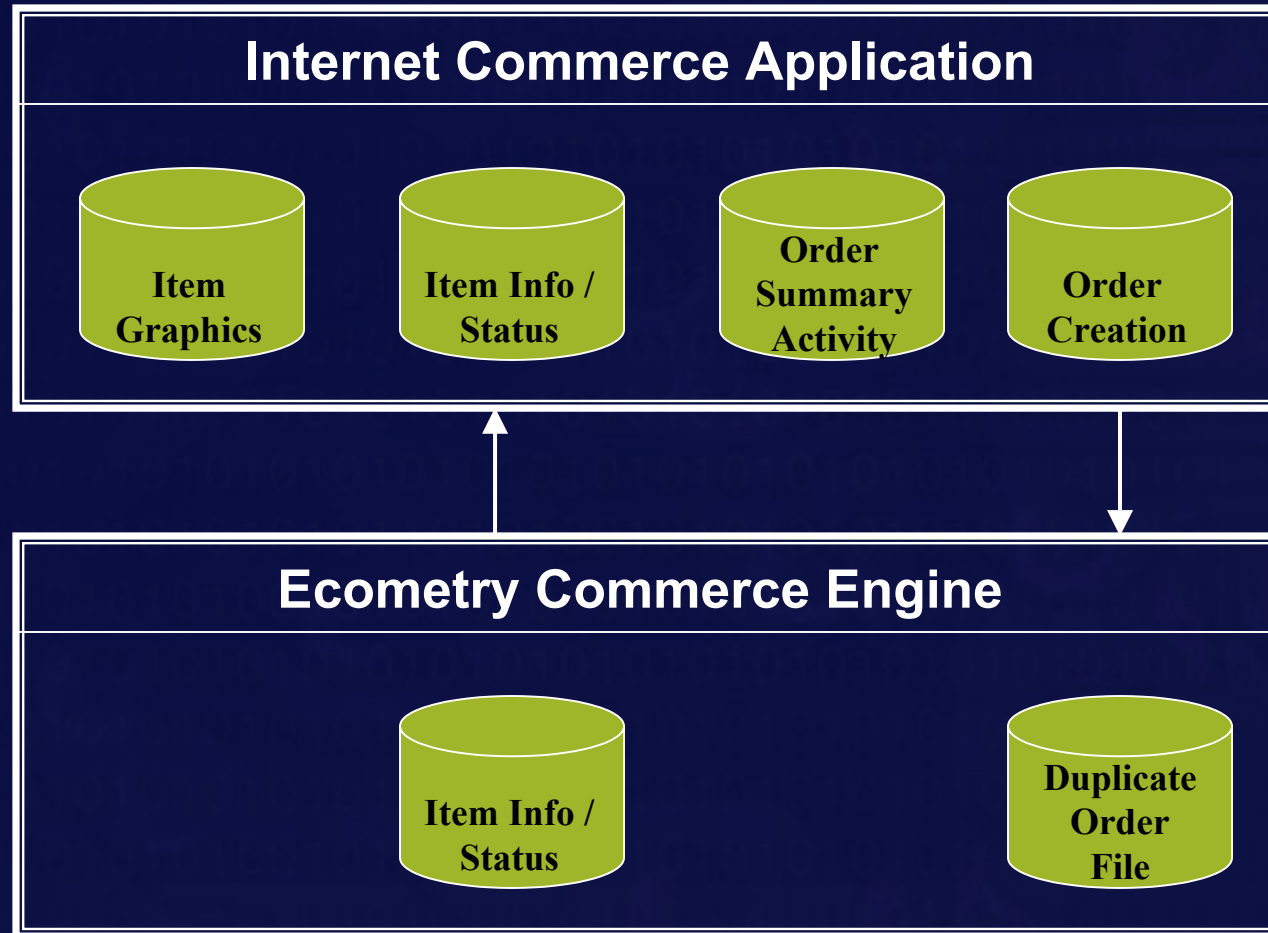
Ecometry Online

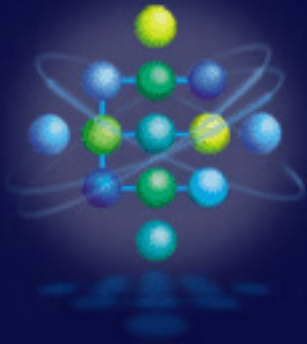
Ecometry  
Commerce  
Engine

- Order taking & Shopping Cart
- Customer Service
- Advertising & Merchandising
- Telemarketing & Ordering
- Fraud Control & Payment Processing
- Order Processing
- Warehousing & Shipping
- Accounting
- Systems Operations

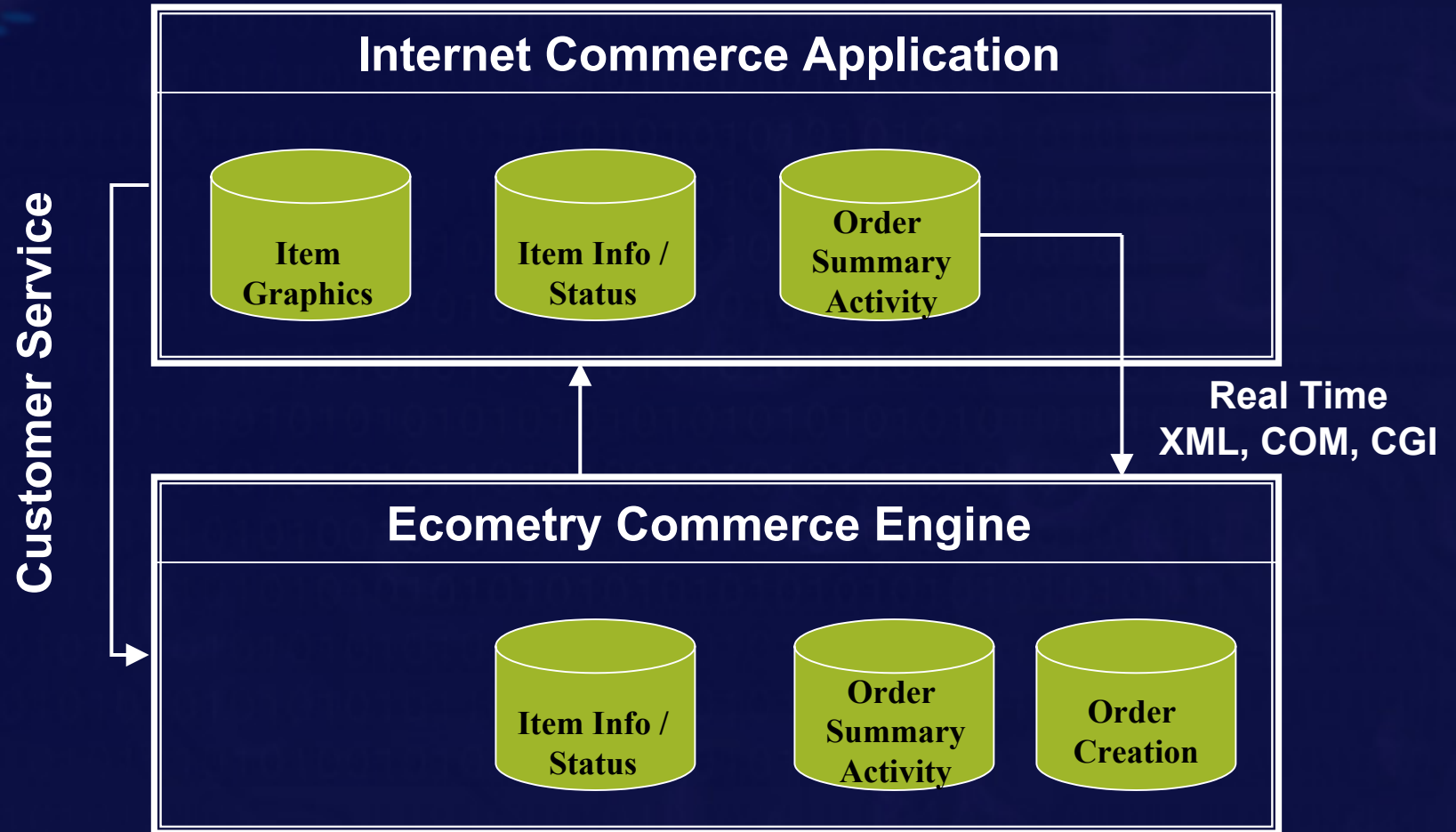


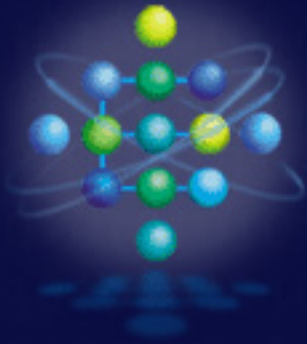
# Ecometry Integration



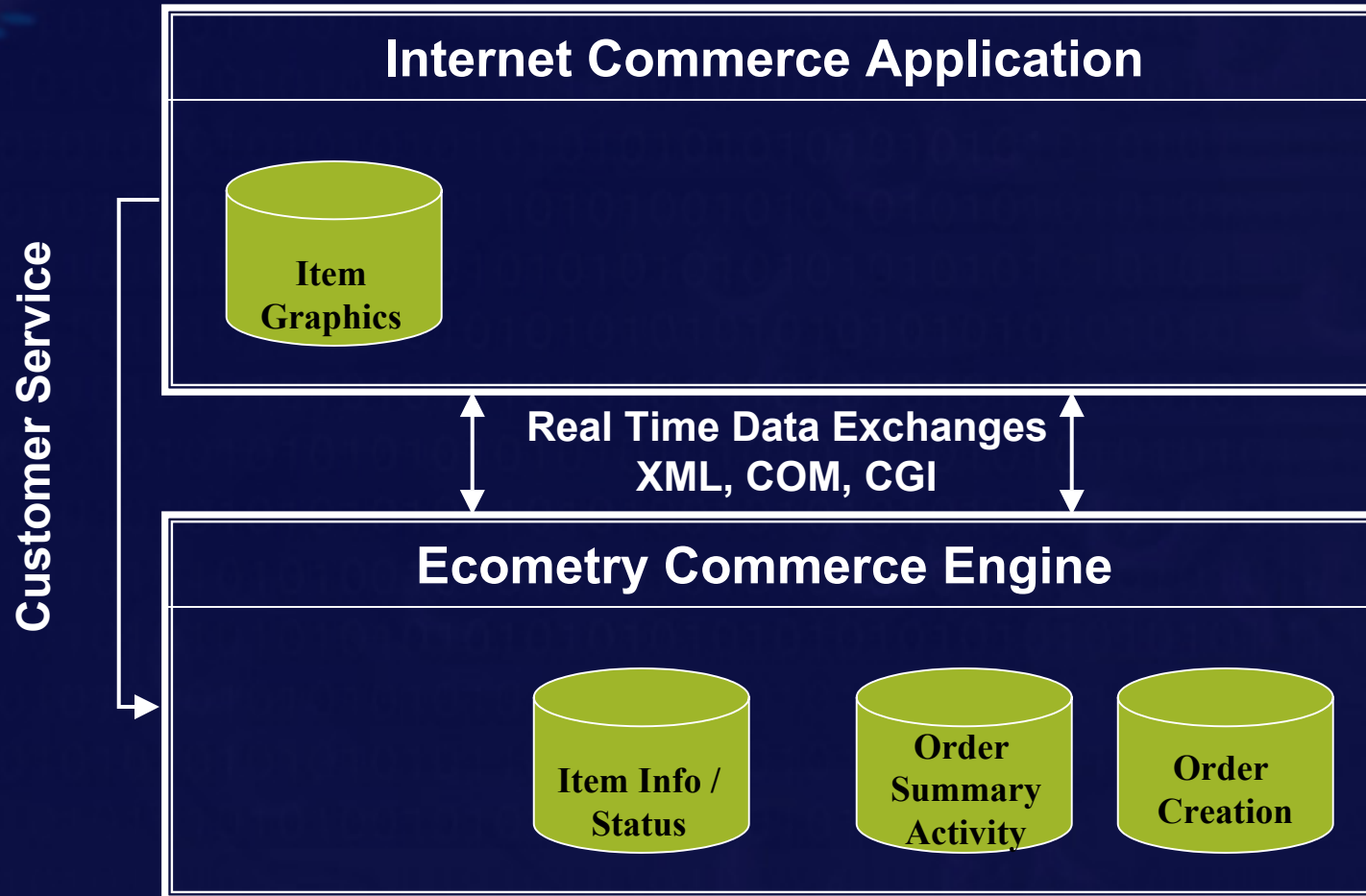


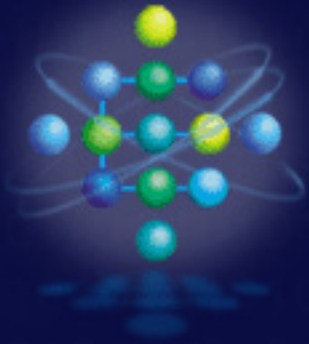
# Ecometry Integration





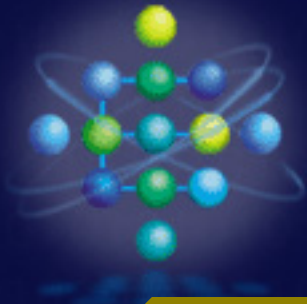
# Ecometry Integration



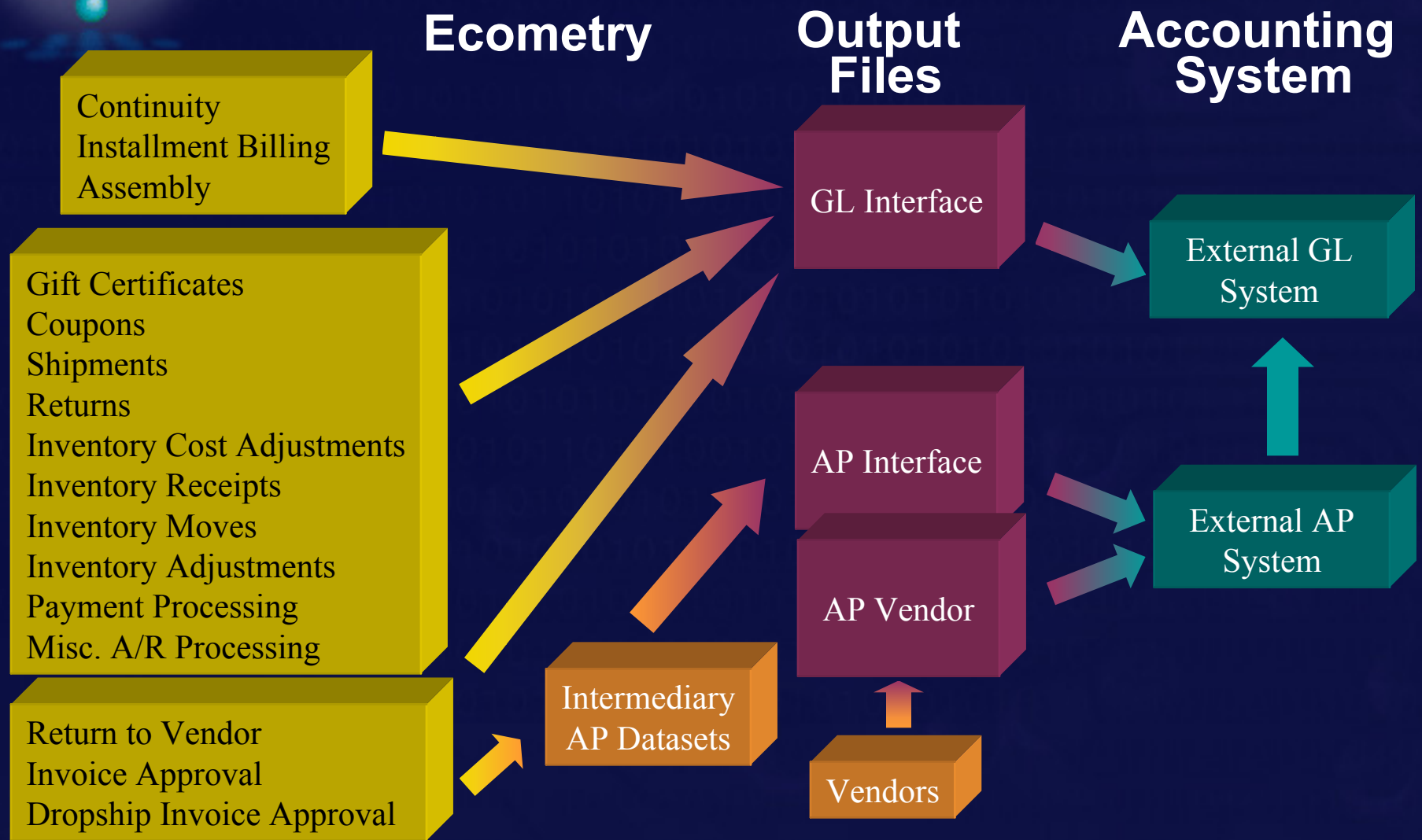


# Ecometry WMS Interface

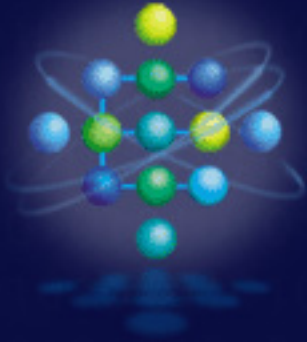




# Financial Interface for GL/AP

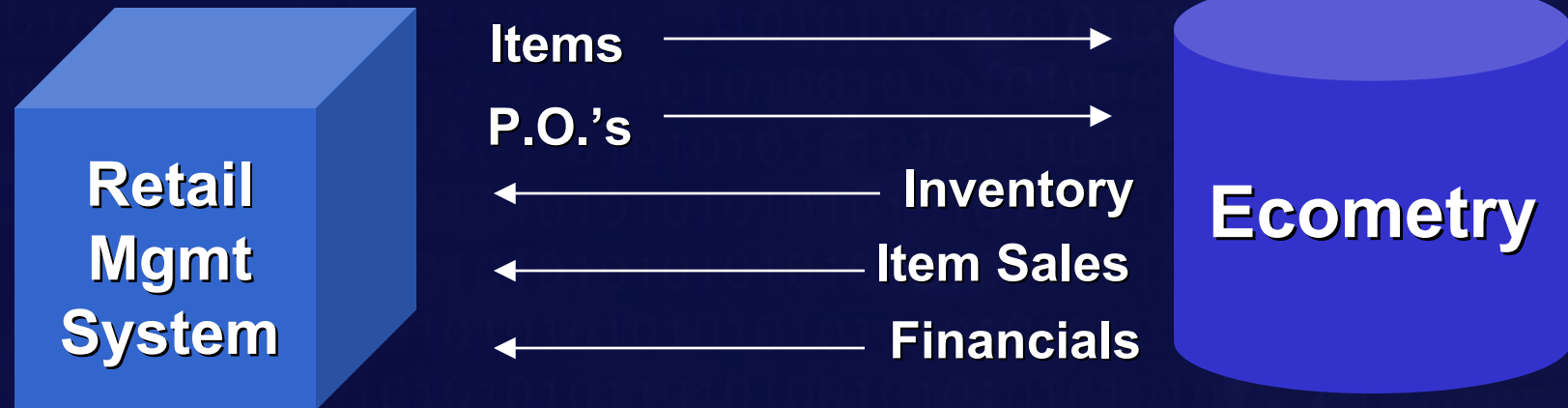






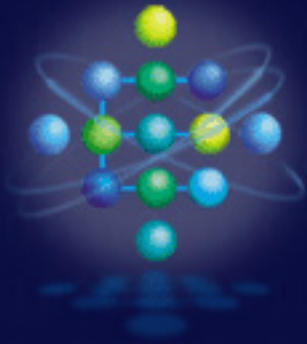
# Retail System Integration

Model 1



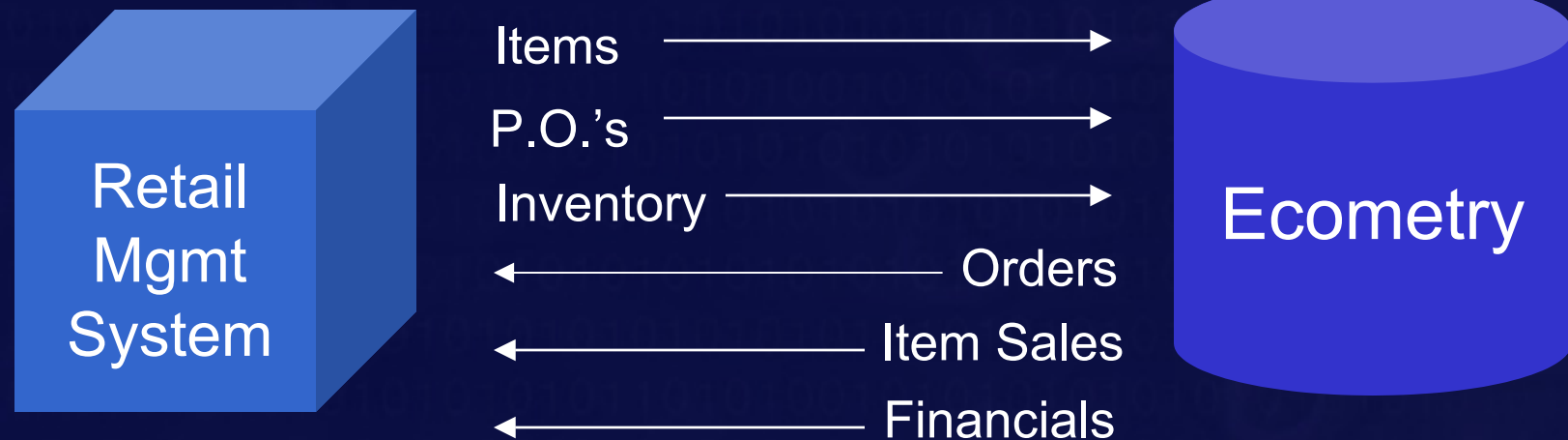
## Assumptions:

- 1) Retailer treats e-channel as another store in RMS
- 2) Retailer manages all merchandising functions from RMS
- 3) Retailer allocates inventory to webstore
- 4) Daily batch interface of sales info from Ecometry to RMS



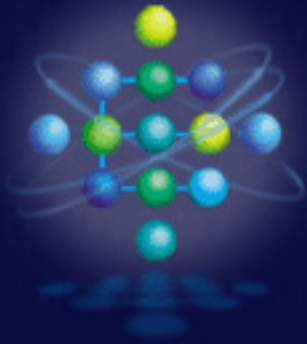
# Retail System Integration

## Model 2



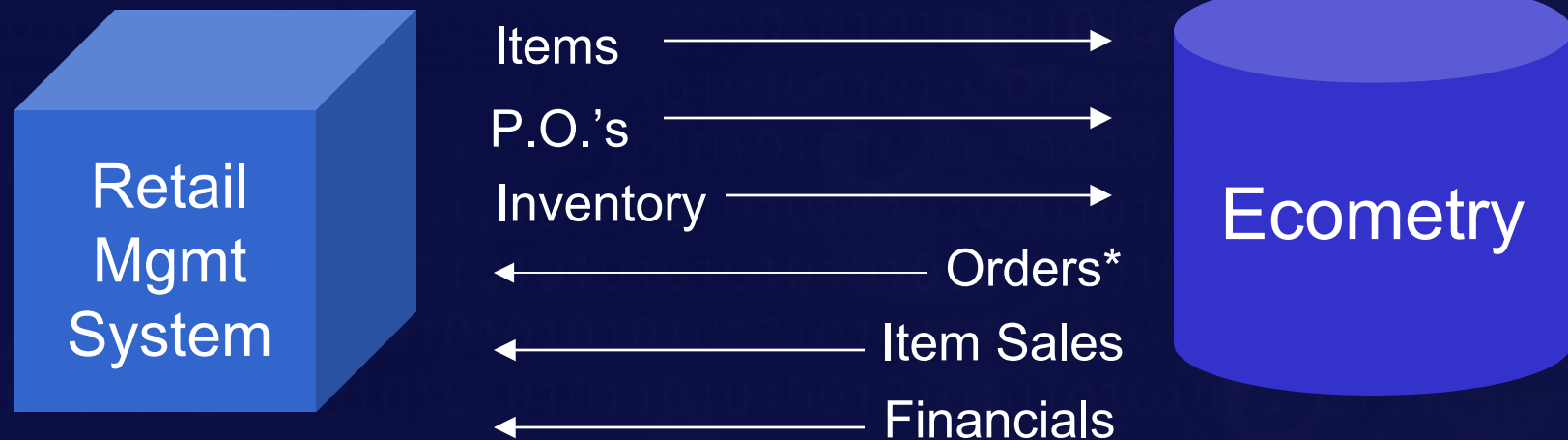
### Assumptions:

- 1) Retailer manages all merchandising functions from RMS
- 2) Retailer ships e-commerce orders from Store DC (does not allocate separate inventory for e-channel)
- 3) Realtime inventory position needed from RMS to Ecometry

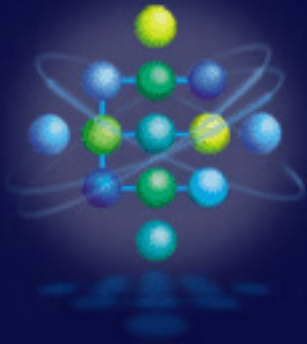


# Retail System Integration

## Model 3

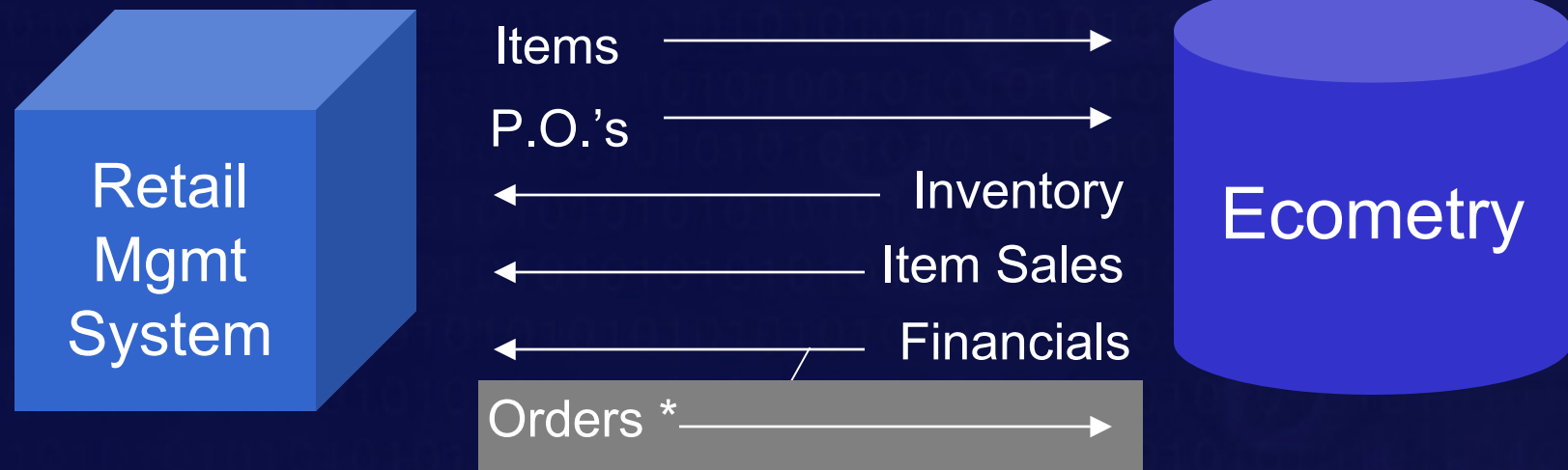


\* Retailer wishes to ship all or some e-commerce orders from the retail store – and/or – reserve the item at the retail store for customer pick-up

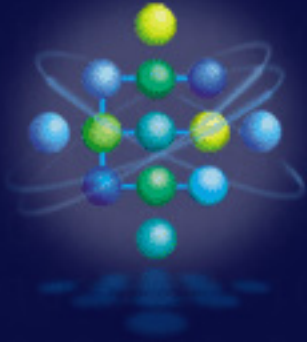


# Retail System Integration

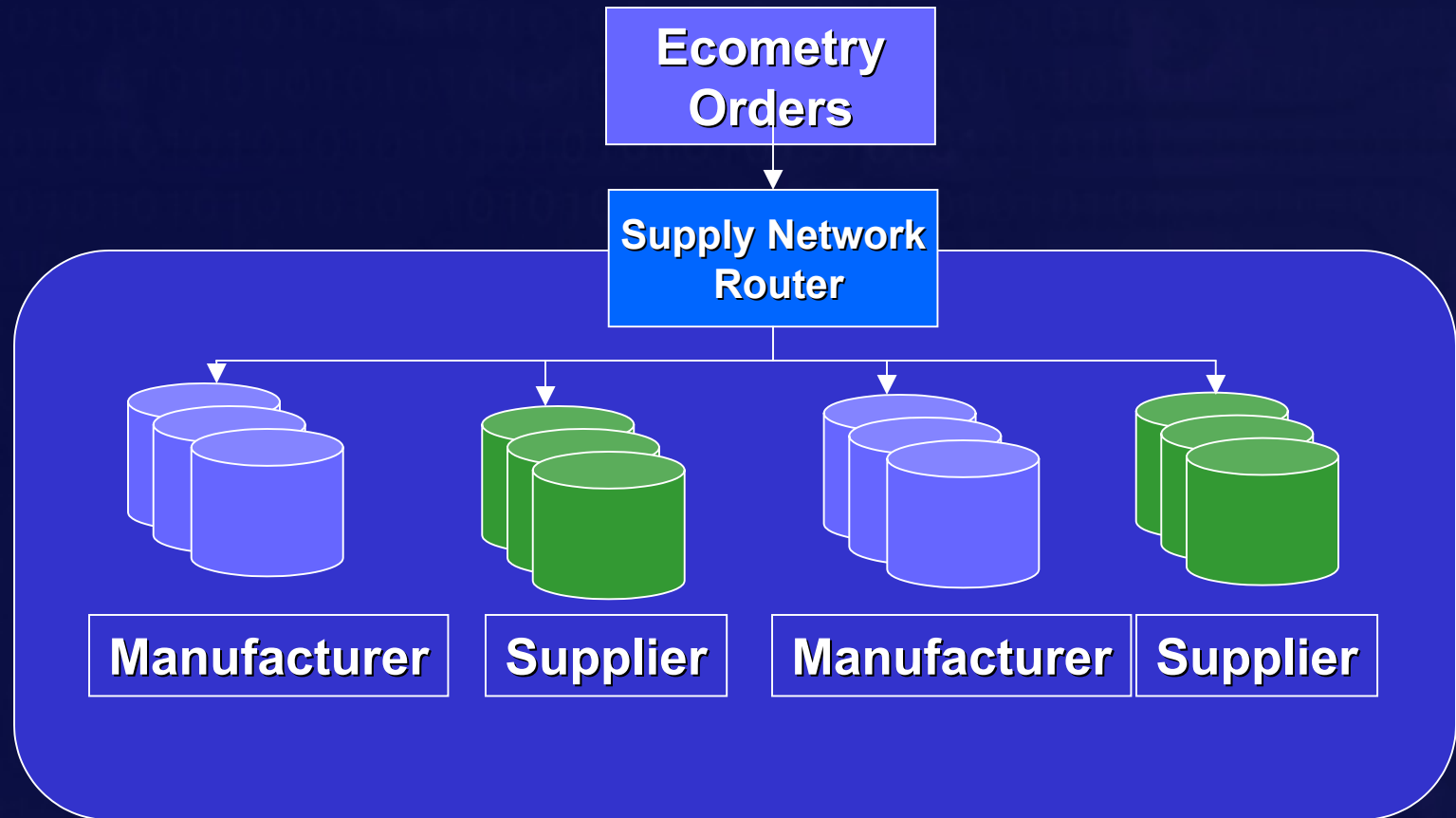
## Model 4

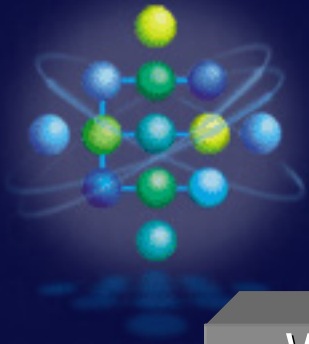


\* In conjunction with Model 1, 2 or 3, retailer sends store order transactions to Ecometry in order to maintain consolidated customer, order and service transaction history in a single database – accessible from all channels.

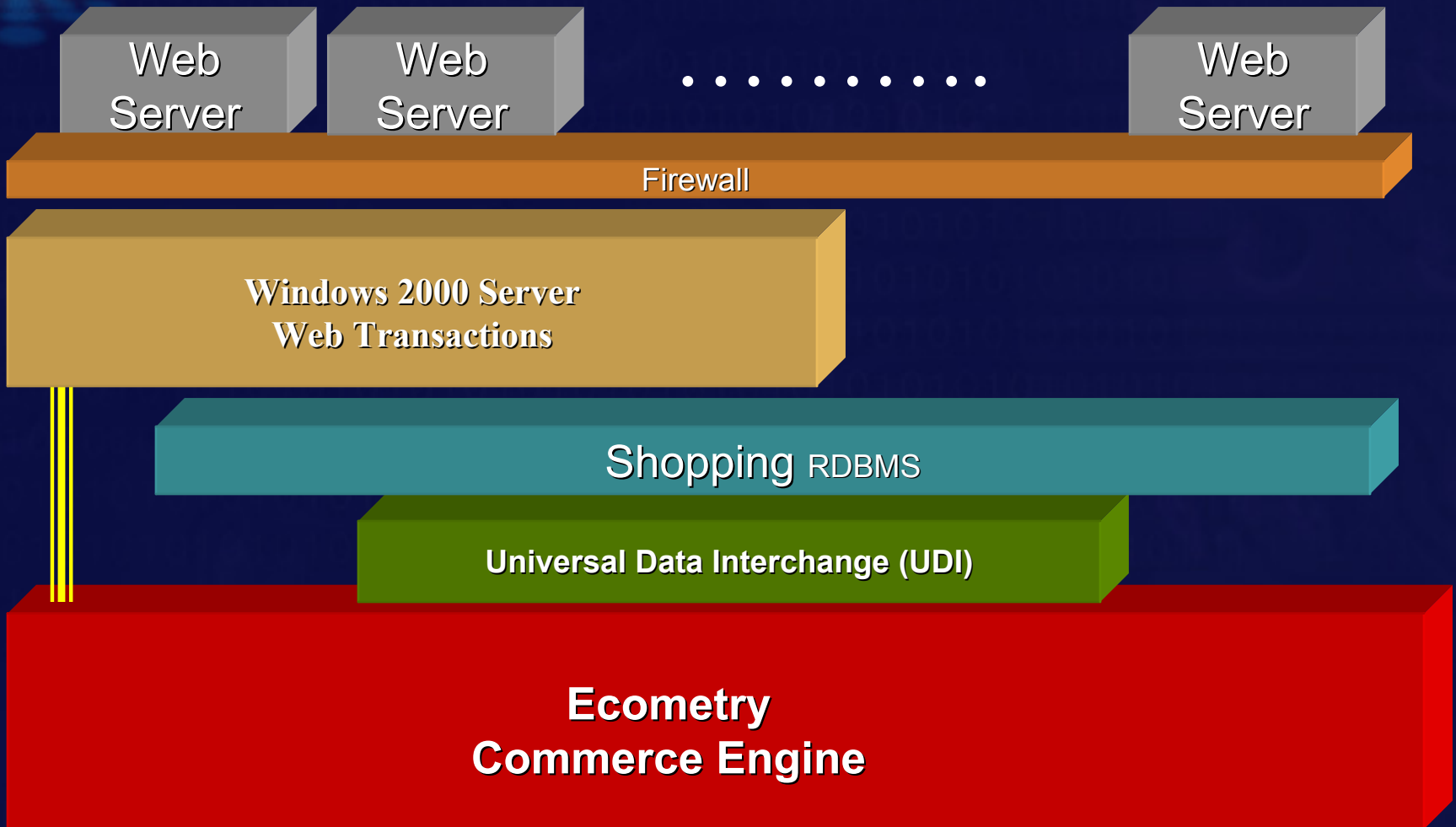


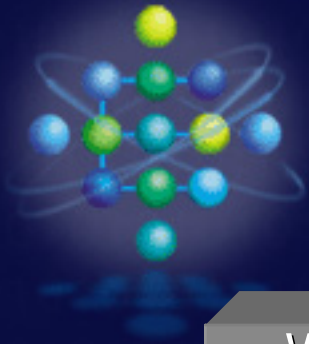
# Ecometry SupplyLink



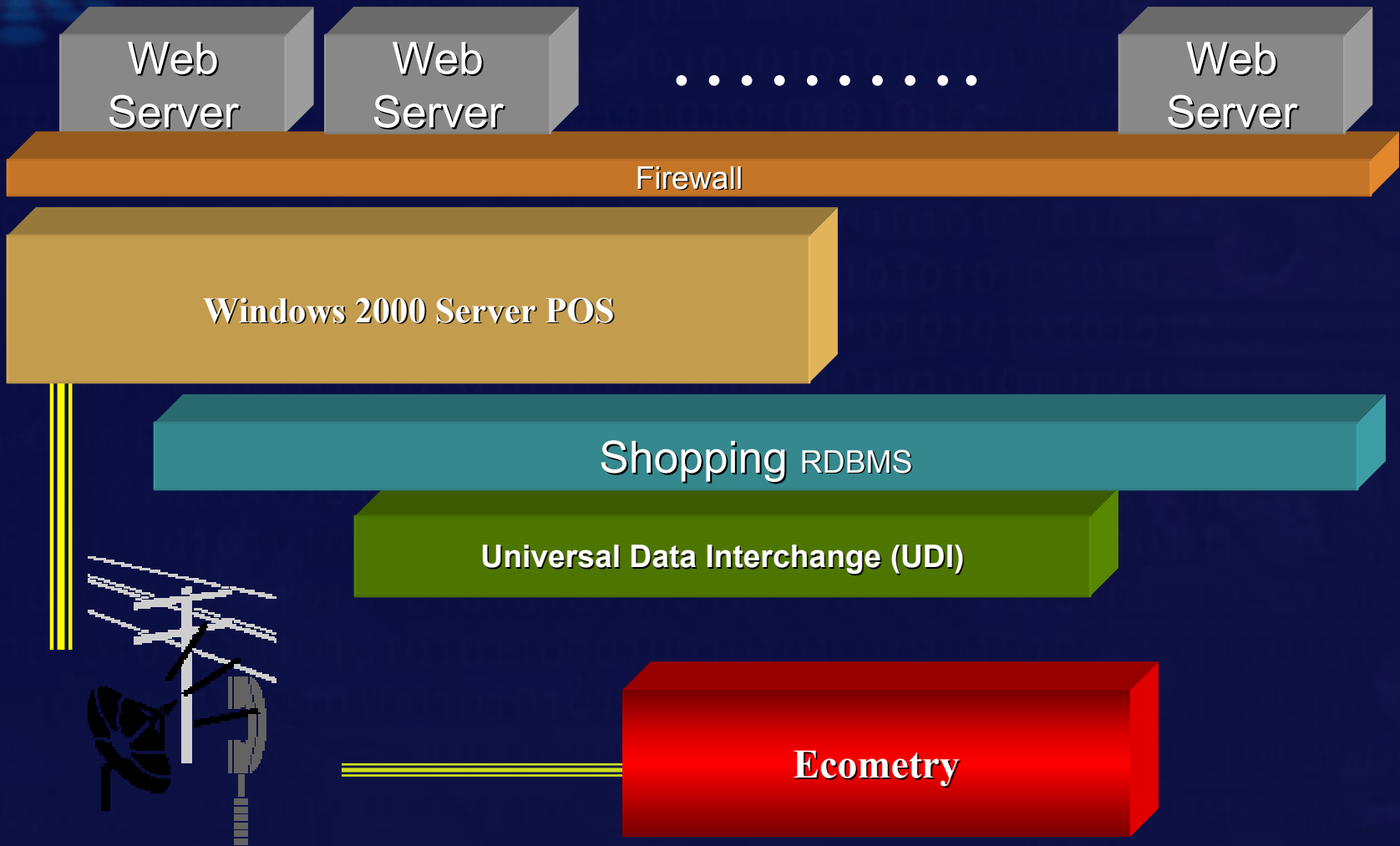


# H/A Web Shopping

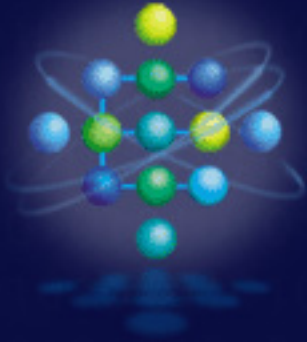




# Point of Sale





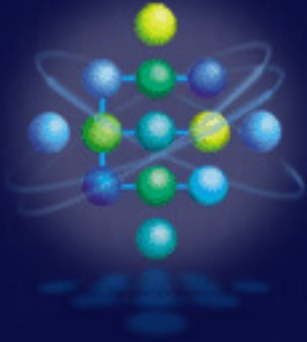


# Inventory Forecasting

Inventory Forecasting is an optional module from the Ecometry suite of products. It is a Access based tool designed to forecast future sales.

This tool will enable you to:

- **Project inventory requirements at the style and item level**
- **Identify potential overstocks**
- **Create management reports**
- **Perform purchasing functions**

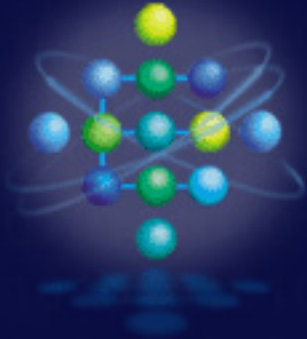


# Inventory Forecasting

One of the best ways to predict demand for a given product is to look at past sales trends for that product under similar circumstances.

A common method of representing this information is to use projection curves to model the **timing** of sales in past **Offers**.

- Each data point on the projection curves is representative of the weekly percentage of the overall sales for a product.
- Once the projection curve is determined for a given product in an Offer, that curve can then be applied to the same or similar product in a new Offer that is expected to follow a similar trend. As this is done inventory projections can then be calculated.



# Inventory Forecasting

Sales data is downloaded daily from ECOMETRY to a stand-alone PC.

- Sales by Offer-Item by day
- Changes to Item Master
- New Offers
- Updated Purchase Orders
- Vendor Maintenance
- Current Inventory Levels

This process is scheduled to run nightly.



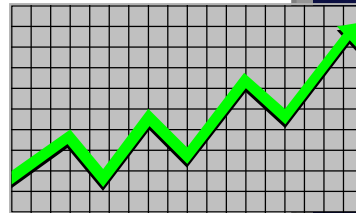
# Inventory Forecasting

Projection Curve Sets are created from completed Offers to be used to predict sales for new Offers.

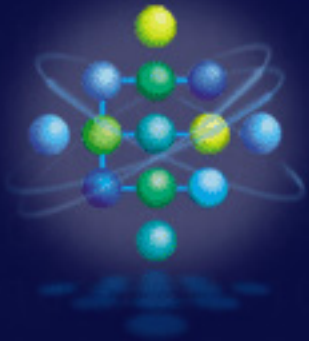
A separate curve is created for each item, style, category and for the overall Offer.

Custom curves can be created and applied as exceptions.

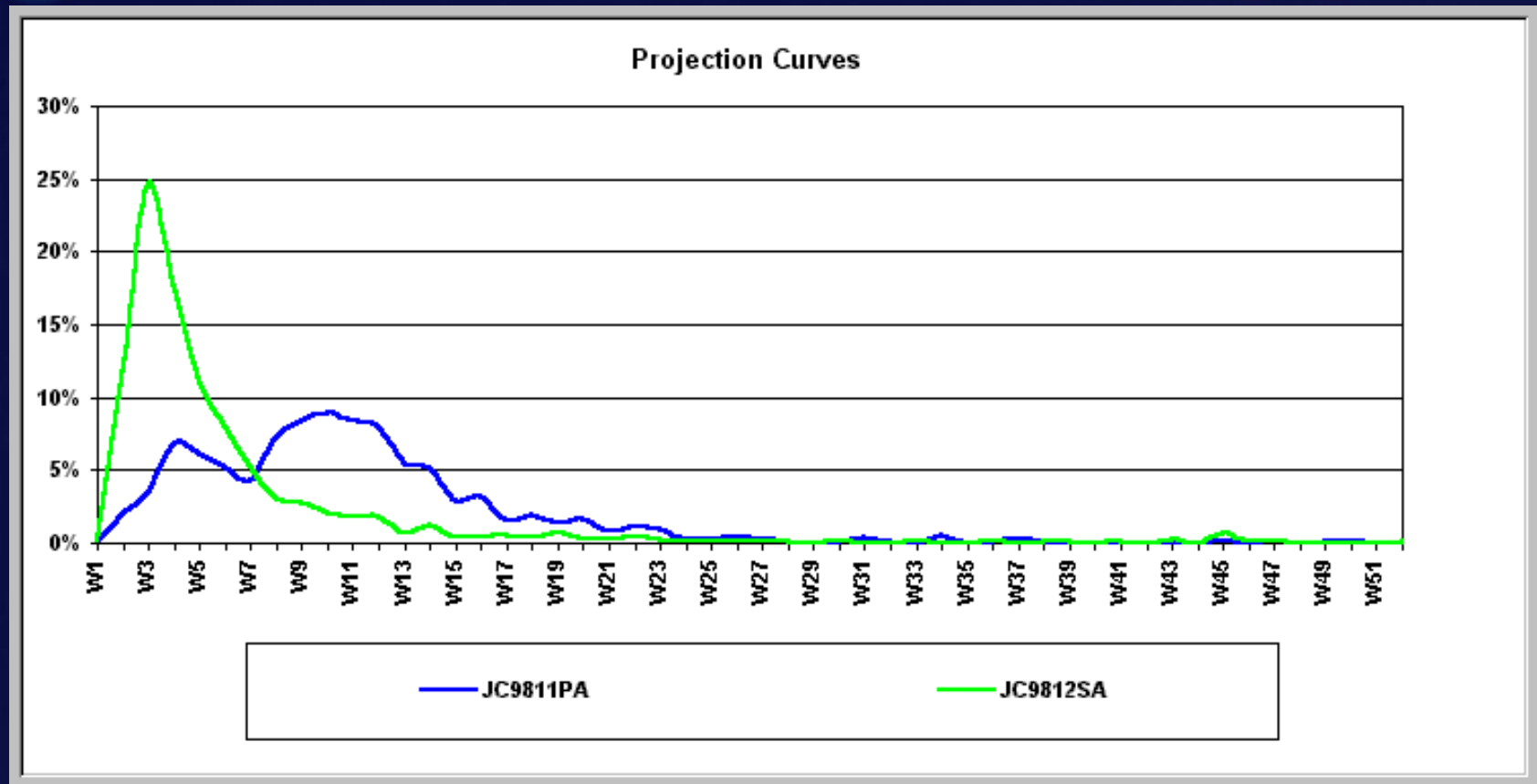
1039	Item Curves
127	Style Curves
78	Category Curves
1	Offer Curve
<hr/>	
1245	Total Curves

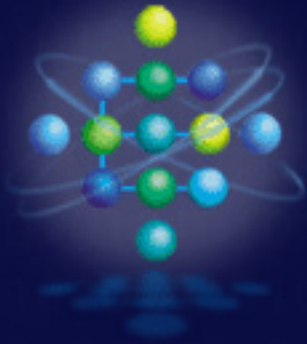


In this example, a completed Offer is used to create 1245 different curves that will be applied to an active Offer



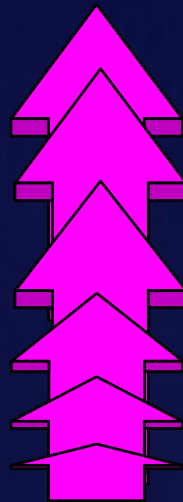
# Inventory Forecasting





# Inventory Forecasting

Curves are assigned to Active/Future Offers.  
Each item in the new Offers is assigned a projection curve.



**OFFER** - Item has no lower level match

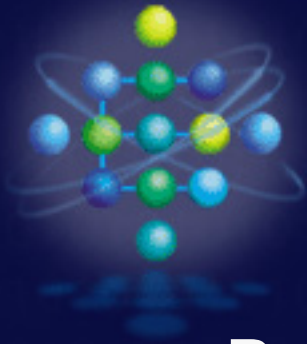
**CATEGORY** - Item matches Projection  
Offer Category

**REFERENCE STYLE** - Item matches Reference  
Offer Style

**STYLE** - Item matches Projection Offer Style

**REFERENCE ITEM** - Item matched Reference  
Offer Item

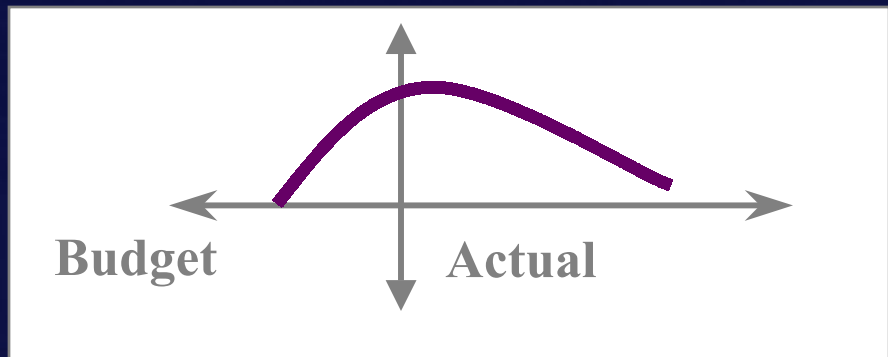
**ITEM** - Item matches Projection Offer Item



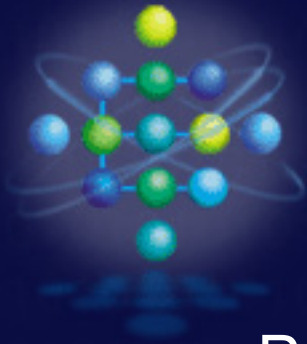
# Inventory Forecasting

Budgets are assigned to future Offers in order to anticipate inventory requirements.

- The Budget figure represents the total unit sales for the Offer-Item.
- Budgets are based upon the sale of the same or similar products in past Offers.
- Inventory requirements are based upon the Budget until a predefined percent complete is reached in sales. This threshold is called the Budget to Actual (BTA) cutover percent.







# Inventory Forecasting

Projections are recalculated daily based upon actual sales against percent complete and the sales distributed according to the Projection Curves.

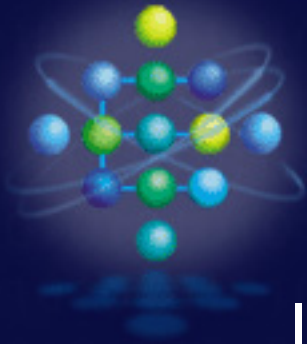
<b>Week #</b>	<b>Projection Curve % of Sales</b>	<b>Budget (Units)</b>
Week 1	5	38
Week 2	8	60
Week 3	10	75
Week 4	12	90
Week 5	11	83
Week 6	6	45
↓	↓	↓
Total Orders	100 %	750

Initial projections are based upon budget values.

The Budget indicated 750 total sales for the product which is then distributed according to the projection curve.

BTA cutover of 20%





# Inventory Forecasting

In Week 1, the budget was 38 but 53 units were actually sold. BTA cutover of 20% is not reached so the future demand will still be based on budget

Week #	Projection Curve % of Sales	Budget (Units)	Sales (Units)
<b>Week 1</b>	5	38	53
<b>Week 2</b>	8	60	60
<b>Week 3</b>	10	75	75
<b>Week 4</b>	12	90	90
<b>Week 5</b>	11	83	83
<b>Week 6</b>	6	45	45
↓	↓	↓	↓
<b>Totals</b>	100 %	750	765

Actual Units  
Sold in Week  
1 was 53



# Inventory Forecasting

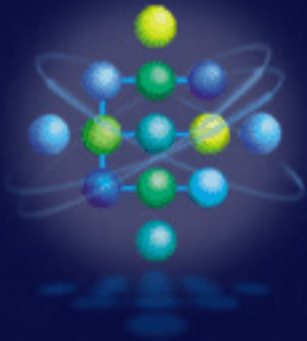
Future projections are self-correcting.

After week 3, item is 23% complete which is > BTA cutover. Therefore, total future demand is recalculated based on actual sales and redistributed over the remaining weeks based on the curve.

Week #	Projection Curve % of Sales	Budget (Units)	Sales (Units)
Week 1	5	38	53
Week 2	8	60	80
Week 3	10	75	102
Week 4	12	90	123
Week 5	11	83	112
Week 6	6	45	61
↓	↓	↓	↓
Totals	100 %	750	1022

$$1022 \times .12 = 123$$

$$\frac{53+80+102}{.05+.08+.10} = 1022$$



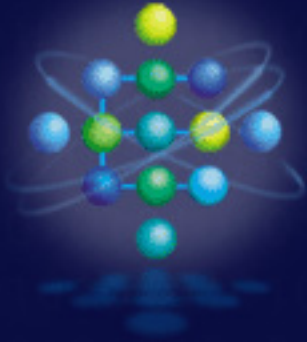
# Inventory Forecasting

Inventory requirements are projected for the next 52 weeks based upon available inventory, projected sales, projected returns, future purchase orders.

All Offers included are 'normalized' so that this week's inventory requirements are always in Week 1.

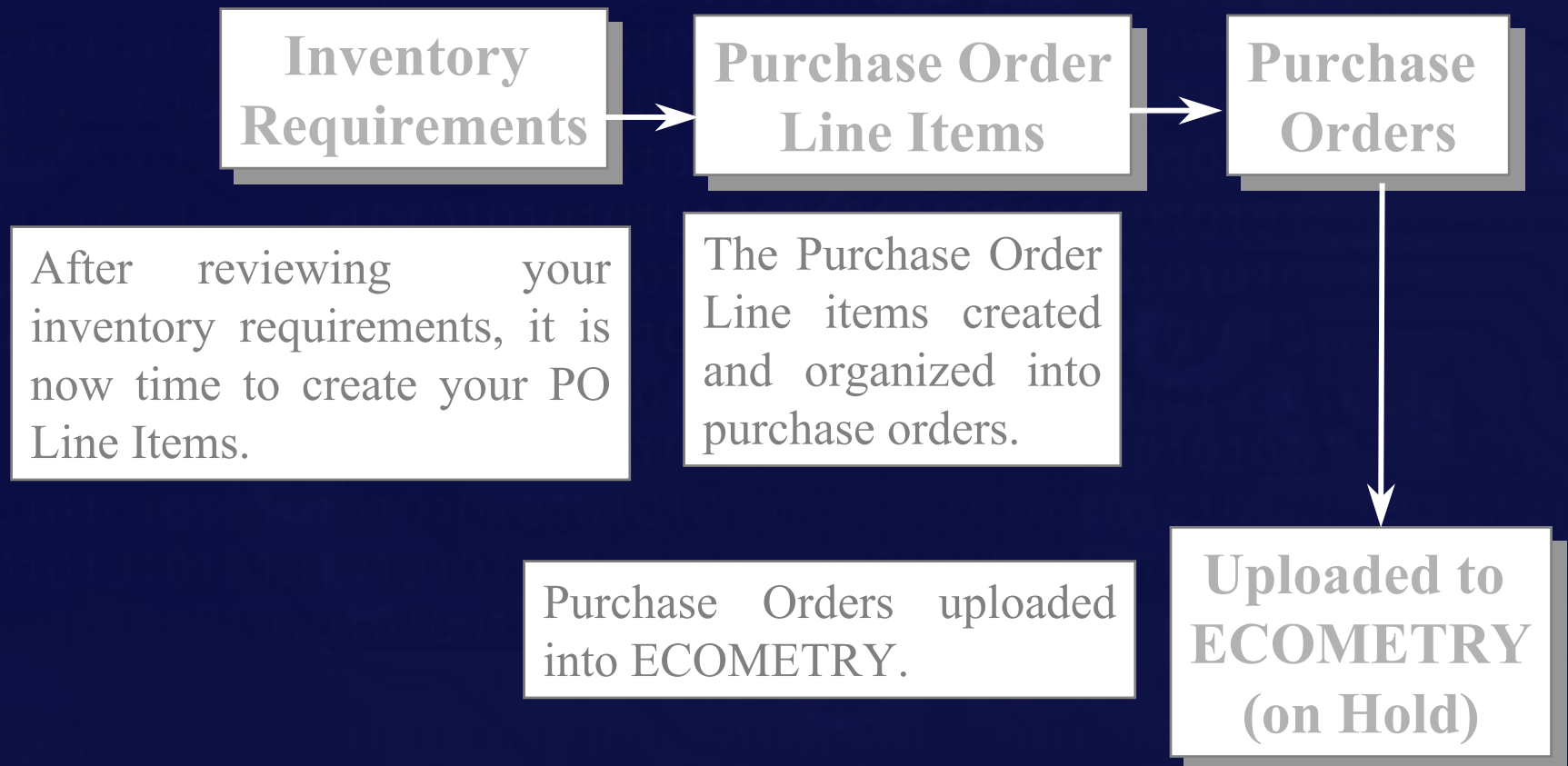
**Week 1 2 3 4 5 6 7 8 9 10 11 12...**

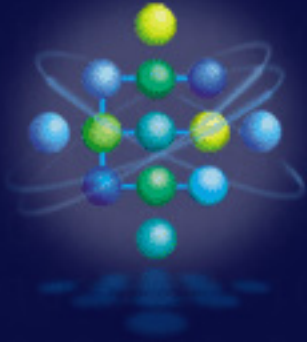




# Inventory Forecasting

Purchase Orders are generated and uploaded into ECOMETRY.

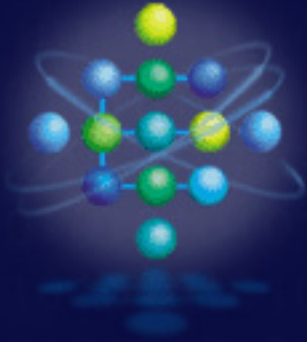




# Predictive Response

Predictive Response is a dynamic product recommendation engine using collaborative filtering techniques.

- Recommends products and categories of products based on product affinities, past purchase history, and a series of user defined rules.



# Predictive Response

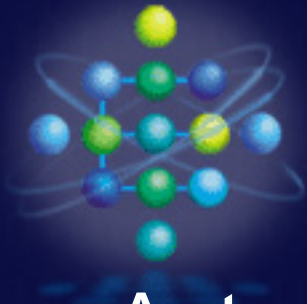
## Types of Recommendations

### Products

- Up to 10 products can be recommended at a time

### Categories

- Up to 10 categories of products can also be recommended
- Customers can then click on the icon/picture associated to the category to display product recommendations



# Predictive Response

## Automatic Rules

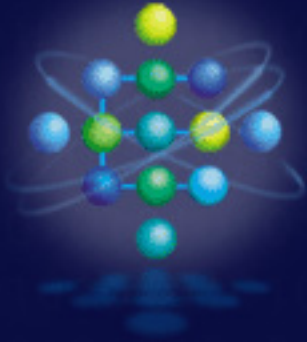
Products are excluded as recommendations if already purchased by customer.

Automatically recommends most recent version or upgrade of product based upon sales history of past versions.

- Items must be linked using the 'sub-with' field.

Automatically excludes products not available on the web.





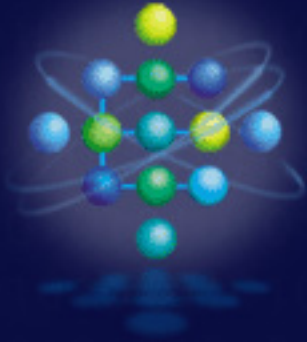
# Predictive Response

## Automatic Rules

Products ordered for gift ship-to's are assigned to the gift recipient's profile, not to buyer.

- This prevents the recommendation of products for a customer based on what they purchased for someone else.



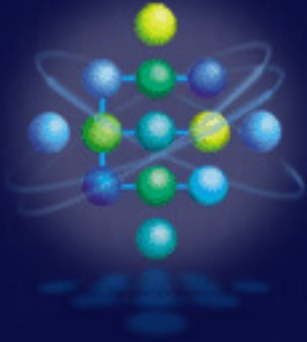


# Predictive Response

## User Defined Rules

Users can create multiple versions of the rules tables and apply the rules tables to different Offers.

- New field added to Offer Maintenance screen.
- Default tables can be defined for each company/division combination.



# Predictive Response

## User Defined Rules

### Stock availability filters

- Only recommend products that have a specific amount of stock.

### Filter product categories and types for recommendations.

- Exclude recommending certain categories of products for certain categories of target items.



# Predictive Response

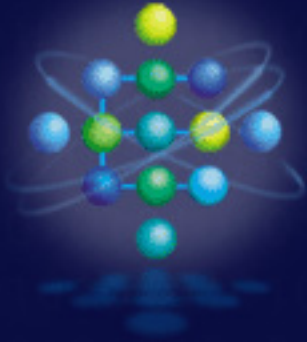
## User Defined Rules

Define maximum price increase from target product price for recommendations.

- Do not recommend a product that costs a defined percentage more than the target item.

Limit recommendations to same company/division as current Offer.

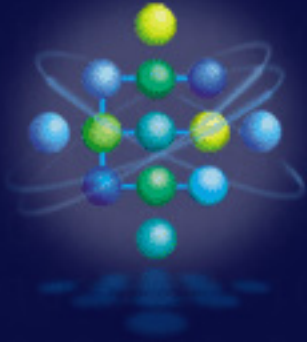
Define required keywords for product recommendations.



# Predictive Response

## Performance Reporting

- How often was a product recommended?
- How often was it purchased from the recommendation?
- Was it purchased from a product or category recommendation?
- Compare overall sales to recommendation sales.
- Compare different rules configurations for optimization.



# Predictive Response

## Performance Reporting

- Over 50 reporting elements defined for performance reporting.
- Reports can be run by date ranges, product types, categories, Offers.
- Summary and Detail reports.

Rules Table Name

**Table Rules**

Result Filters

System Limits

Global

## Confidence Factor

	Product-Product		Category-Product		Product-Category		Category-Category	
	Orders	Percent	Orders	Percent	Orders	Percent	Orders	Percent
By Order	<input type="text" value="20"/>	<input type="text" value="5"/>	<input type="text" value="20"/>	<input type="text" value="5"/>	<input type="text" value="30"/>	<input type="text" value="7"/>	<input type="text" value="35"/>	<input type="text" value="8"/>
By Customer	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

## Selection Priority

**Available Statistics**

- Category to Product by Customer
- Category to Product by Order
- Product to Category by Customer
- Product to Category by Order
- Product to Product by Customer
- Related Products

Add

Del

**Selected Statistics**

- Product to Product by Order
- Category to Category by Customer

☒ Use Forced Upsell

Update

Exit

Rules Table Name

Table Rules

Result Filters

**System Limits**

Global

Shopping Cart

Category Limit Product Limit ☒ Use Grouping

Customer History

Category Limit Product Limit ☒ Fill Using Top 10

Top Products

Category Limit Product Limit Minimum GM% 

Click-Stream

Category Limit Product Limit ☐ Use Grouping

Product Grouping

Maximum Grouped Products Maximum Grouped Correlations Grouped Product Factors     

Customer Activity

Customer Purchase Recency Minimum Product Clicks Update

Exit

Rules Table Name

Table Rules

**Result Filters**

System Limits

Global

Filters

Exclude Prod Type	<input type="text" value="C3"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	For Category	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maximum Price %	<input type="text" value="200"/>					Exclude	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Minimum Inventory	<input type="text" value="0"/>					<input type="checkbox"/> Within Company	<input type="checkbox"/> Within Division			

Recommended Product Keywords

<input checked="" type="checkbox"/> Use Customer Survey Demographics	Demographic Keyword Table	<input type="text"/>
Demographics Starting Position	Demographics Ending Position	<input type="text" value="60"/>

Required Keywords

<input type="text" value="PQ"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/> Required	<input checked="" type="radio"/> Required	<input checked="" type="radio"/> Required	<input checked="" type="radio"/> Required	<input checked="" type="radio"/> Required
<input checked="" type="radio"/> One Required	<input type="radio"/> One Required	<input type="radio"/> One Required	<input type="radio"/> One Required	<input type="radio"/> One Required

Update

Exit




Rules Table Name 

Table Rules

Result Filters

System Limits

**Global**

Product Analysis

- Use Category ☐ Position 1  
☐ Position 2  
☐ Position 3  
☐ Position 4

Order Selection

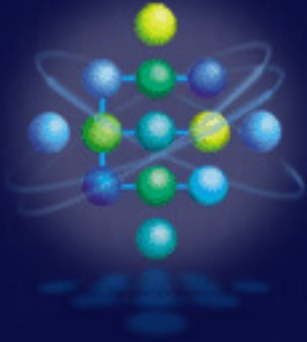
- Offer Mask
- Number of Weeks
- Selection Range ☒ Weeks Back ☐ Date Range
- Starting Date
- Ending Date

Click-Stream Retention

- Number of Days
- ☒ Retain Click When Ordered

Update

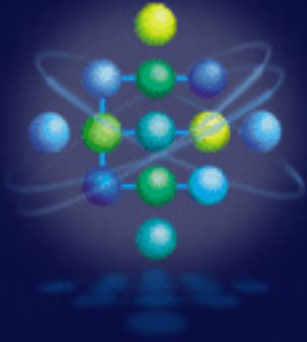
Exit



# E-Mail Executive

**E-Mail Executive** is a solution to help you manage inbound customer e-mail.

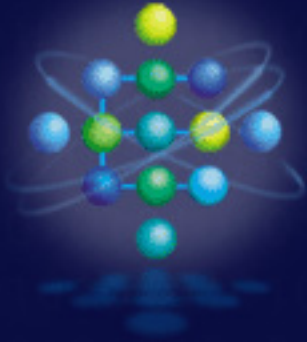
- Product Inquiries
- Customer Service Issues
- Website questions
- FAQ



# E-Mail Executive

## 2 ways to route

- **Department based routing**
  - Reps belong to 1 or more departments and work e-mail in a FIFO mode.
- **Skill set Routing**
  - Reps are assigned to skill sets and also given a capacity of e-mails to work.

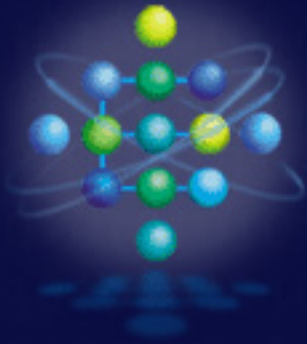


# E-Mail Executive

**E-Mail Executive parses through the subject line and body of the e-mail searching for keywords you define.**

**Keywords are assigned departments or skill sets and giving a 'weighting' value that is tabulated during the searching process.**

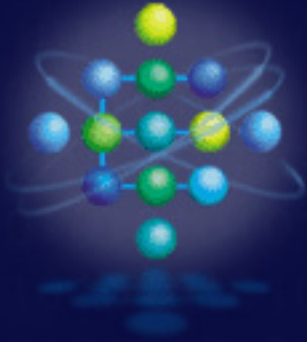
**Departments or skill sets with the highest weight gets the e-mail!**



# Keywords

- Corresponding weight/rank and department
- Departments are added up
- Plurality is also searched

<i>Keyword</i>	<i>Value</i>	<i>Department</i>
Leash	10	Accessories
Collar	15	Accessories
Kitten	15	Cat
Persian	30	Cat
Heartworm	15	Vet
Doberman	30	Dog
Fleas	10	Grooming

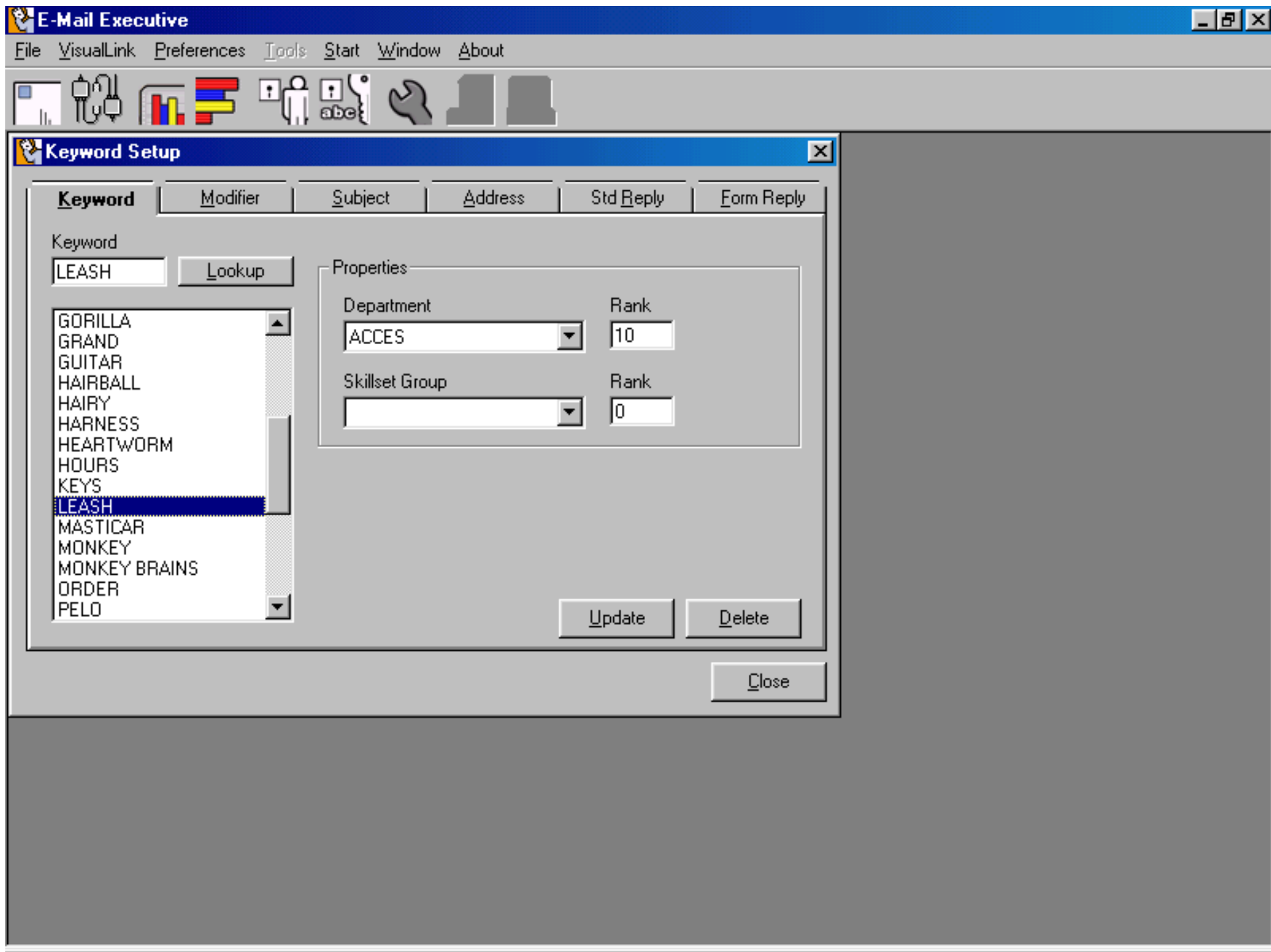


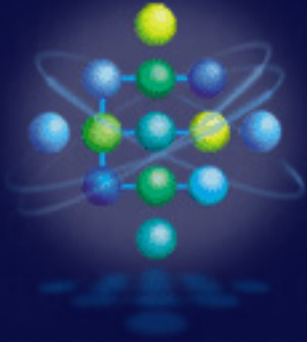
# Example

“What type of leash and collar should I use on my attack Doberman?”



Leash	10	Accessories
Collar	15	Accessories
Doberman	30	Dog





# Departments

Every department that receives and responds to e-mail

Action Chain - Auto Acknowledgement

Default Department


BCC

Departments are assigned to Groups



E-Mail Executive

FileVisualLinkPreferencesToolsStartWindowAbout



Keyword Setup

User/Department Setup

GroupsUserSecurityDepartmentUser / DeptSkillset Groups

Department ID

CATS

Lookup

ACCES

ACCT

BANANAS

BIRDS

CATS

CUSTSERV

DOGS

GORILLAS

GUITAR

PERCUS

PERRO

PIANO

STRINGS

VET

ZOUNDS

Name

CATS

Group

PETS

Remove

Group Properties

E-Mail Address

custserv1@smith-gardner.com

BCC Address

Outbound Mail Server

mail.smith-gardner.com

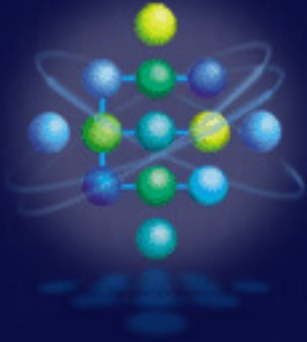
Action Chain

3000

Update

Delete

Close



# Groups

How your customer views you

- Different Websites
- Multi Co/ Div

Header and/or Footer Graphics on outgoing e-mail

Where pictures are stored

Default settings

Signature Cards for Reps

**E-Mail Executive** [X] [ ] [ ]

File VisualLink Preferences Tools Start Window About

[Icon] [Icon] [Icon] [Icon] [Icon] [Icon] [Icon] [Icon]

**Keyword Setup** [X]

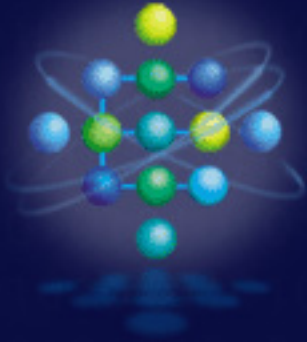
**User/Department Setup** [X]

**Groups**   User   Security   Department   User / Dept   Skillset Groups

Group ID:       Name:

**Properties**

Company / Division:    Web Site URL:   
Company Name:   
Default Department:    Default Skillset:   
Banner Graphic:   
Product Image Location:   
Product Image Format:    ☐ Zero-Fill Image Filename



# E-Mail Reps

Multiple Groups

Security

Skill set Routing


- Skill sets
- E-Mail Capacity

User/Dept/X-ref

- Reps are assigned to the departments they can answer e-mail from

E-Mail Executive

FileVisualLinkPreferencesToolsStartWindowAbout



Keyword Setup

User/Department Setup

GroupsUserSecurityDepartmentUser / DeptSkillset Groups

User ID

MGR

Lookup

CUNNINGH  
ER142  
MGR

Name

Manager

Group

PETS

Remove

Group Properties

E-Mail Address

custserv1@smith-gardner.com

Signature

Mgr in Pets Dept

Available Skillsets

Left Arrow

Right Arrow

User Skillsets

STRINGS  
GROOMING

User / Session

User

Security Template

1: MGR

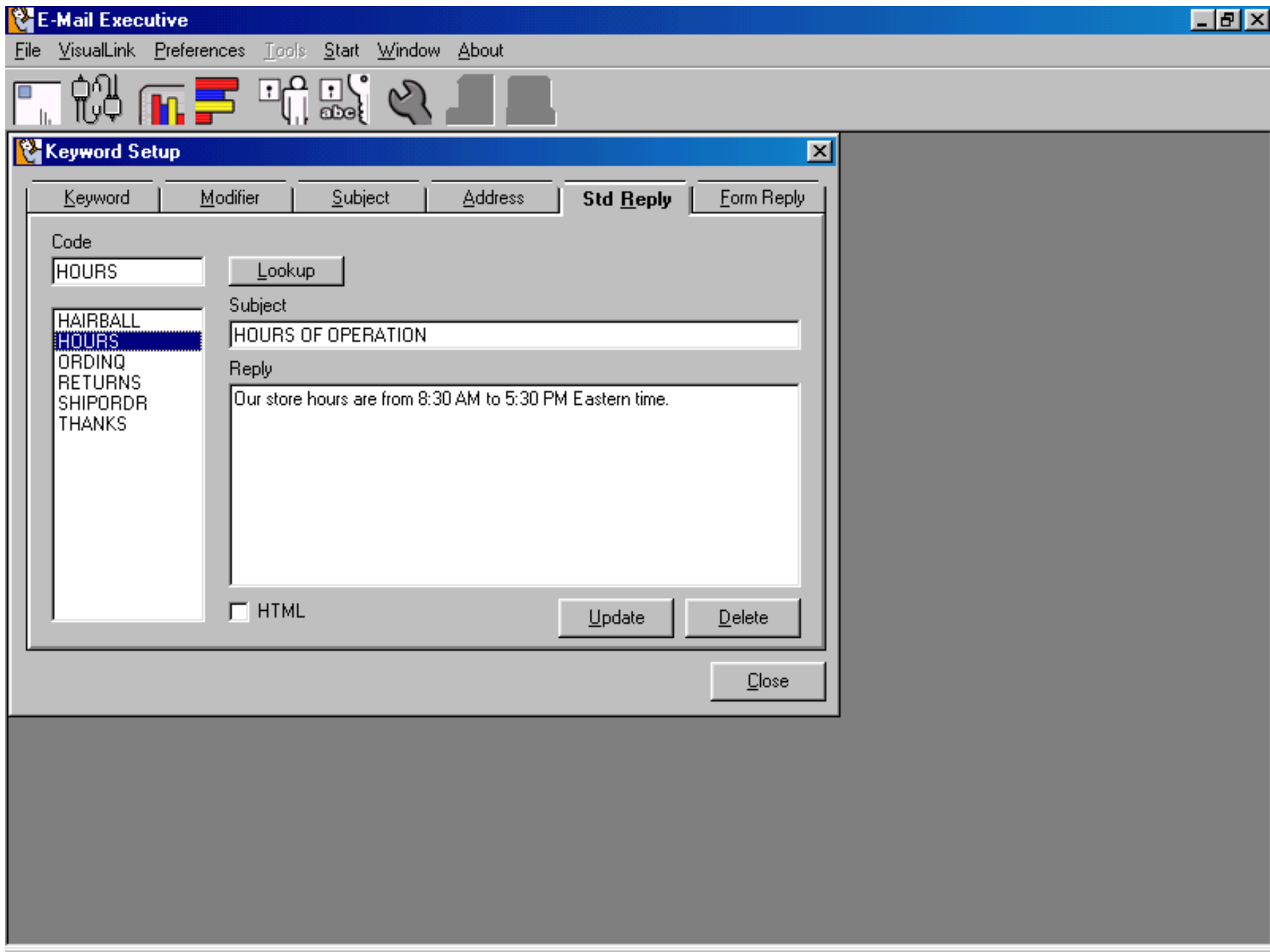
E-Mail Capacity

5

Update

Delete

Close





E-Mail Reply Management

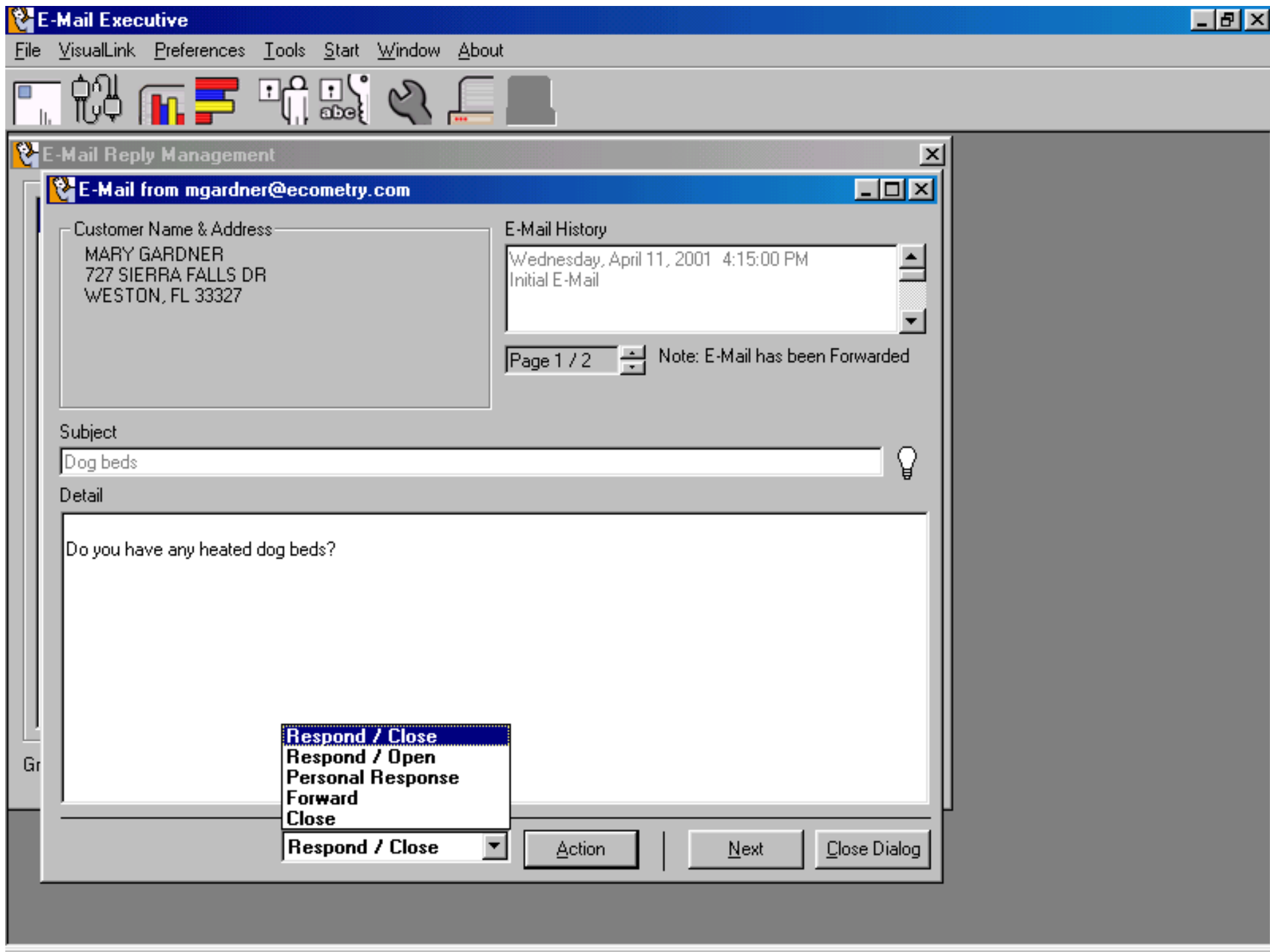
ACCE\$	1
BANANAS	1
BIRDS	0
CATS	3
CUSTSERV	0
DOGS	2
GORILLAS	9
GUITAR	0
PERCUS	0
PERRO	0
PIANO	0
STRINGS	0
VET	2

Group: All

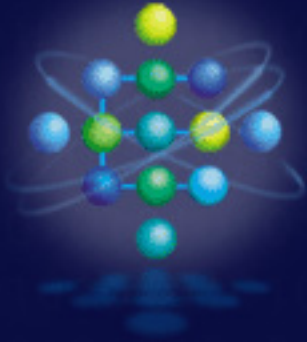
Refresh

Select Dept

Close



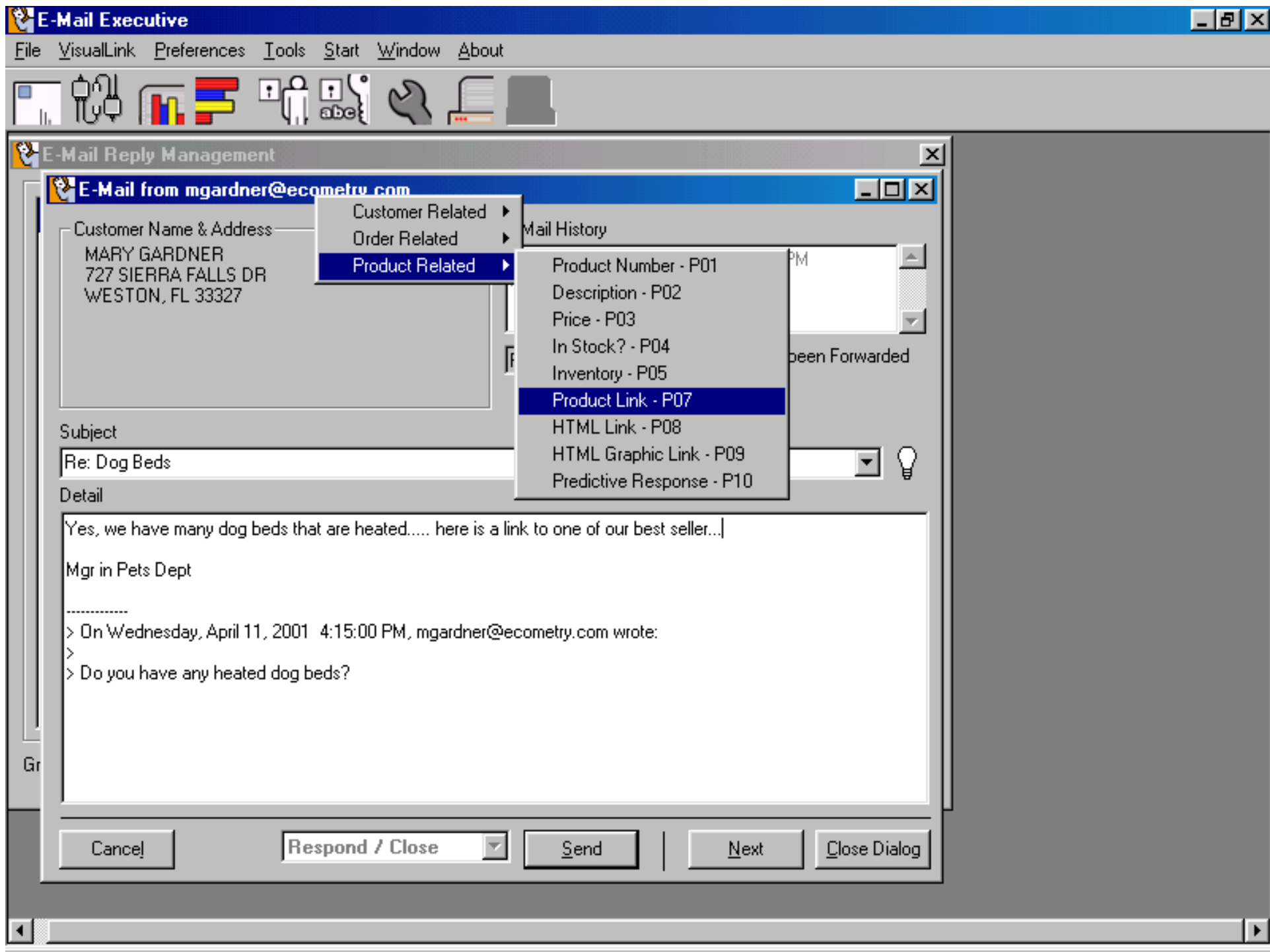




# E-Mail Executive

Insert E-Mail Executive Trick Codes

- Order Status
- Tracking Number
- Product Price, Description
- Inventory Level
- Product Images, etc.
- And More... ..



Re: Dog beds (mg11678) - Message (HTML)

Reply Reply to All Forward Print Attachments Undo Redo Bold Italic Underline Link Unlink Help

File Edit View Insert Format Tools Actions Help

From: CUSTSERV1@SMITH-GARDNER.COM

Sent: Tue 4/24/01 3:14 PM

To: mgardner@ecometry.com

Cc:

Subject: Re: Dog beds (mg11678)



Yes, we have many dog beds that are heated..... here is a link to our best seller...

<http://www.tekritters.com/cgi-D02+0926+0009&TRAN85=Y&EDP=6064>

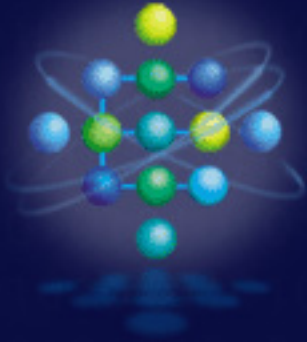
Mgr in Pets Dept

> On Wednesday, April 11, 2001 4:15:00 PM, mgardner@ecometry.com wrote:

>

> Do you have any heated dog beds?





# E-Mail Executive

E-Mail (inbound and outbound) details are visible in Customer Service!

- Service Tracking = 'Y'
- Customer Track

MARY GARDNER  
727 SIERRA FALLS DR  
WESTON, FL 33327

Active  
Customer  
Type 01  
D - -  
N - -  
F - -

Cust. # 612

Initial DOGS 04/11/01  
Do you have any heated dog beds?  
Forward ACCES 04/11/01  
possibly suggest the turno XL7  
Respond MGR 04/24/01  
Re: Dog beds

Inquiry comments

Order No. \*0000000 Track No. 80000089

Operator EHLMAIL Date 04/11/01 Time 16:15

Reason 42 INBOUND EMAIL

Return

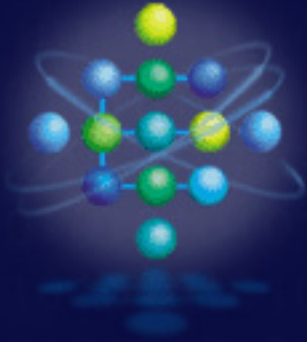
Open New  
Track

Next  
Track

Prior  
Track

Customer  
Track

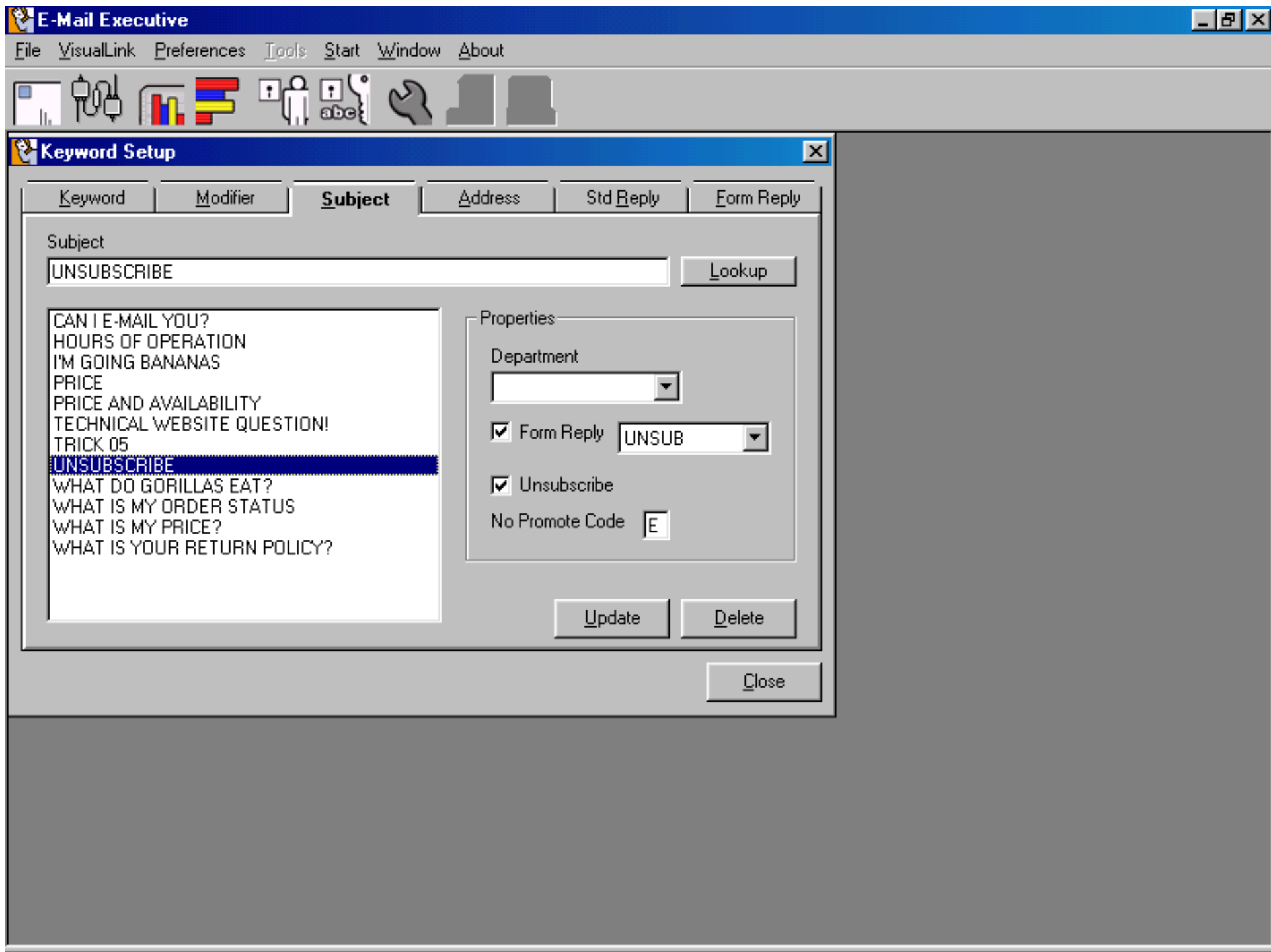
View  
E-Mail

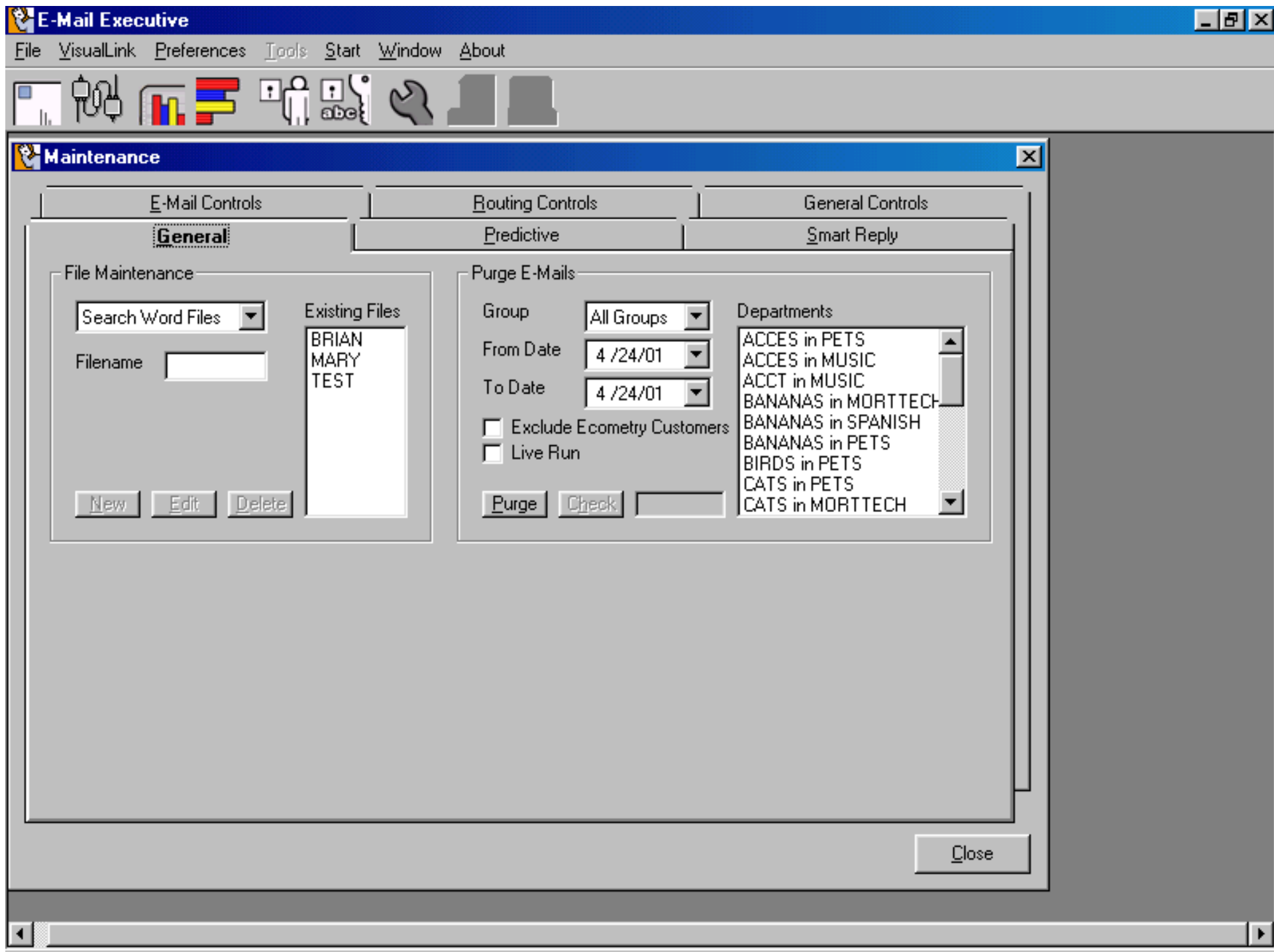


# E-Mail Executive

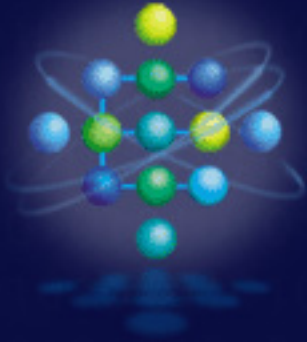
E-Mail Executive can generate auto responses 2 ways... .

- Smart Reply functionality
  - The 'Light bulb' – one step further!
  - Define rules for when to use smart reply
- Exact Subject line matching
  - Used mostly with 'Forms'









# E-Mail Executive

Proof Reports

Keyword Analysis

Hourly Volume

Reply Volume

E-Mail Print

E-Mail Address Extract

■ Send E-Mail!

E-Mail Executive

File

VisualLink

Preferences

Tools

Start

Window

About

E-Mail Reports/Extracts

Report Parameters

Report Type

Daily Trends Analysis

Word Selection

Daily Trends Analysis

E-Mail Address Extract

E-Mail Print

E-Mail Volume Extract

Popularity Extract

Proof - Addresses

Proof - Auto Response

Proof - Departments

E-Mail Address

From Date

To Date

4 /24/01

Use Word File

Send E-Mail

Letter Code

Include "No Promote"

☐

Include Ecometry Customers

☐

Departments

ACCES

ACCT

BANANAS

BIRDS

CATS

CSR Box

CUSTSERV

DOGS

GORILLAS

GUITAR

Stream Parameters

Printer

LP

Schedule

☐

Priority

13

Schedule Date

4 /24/01

at

00:00

Report Results

01/11/2001 - E-Mail Volume Extract (#J913)

03/29/2001 - Daily Trends Analysis (#J3894)

04/18/2001 - Daily Trends Analysis (#J5778)

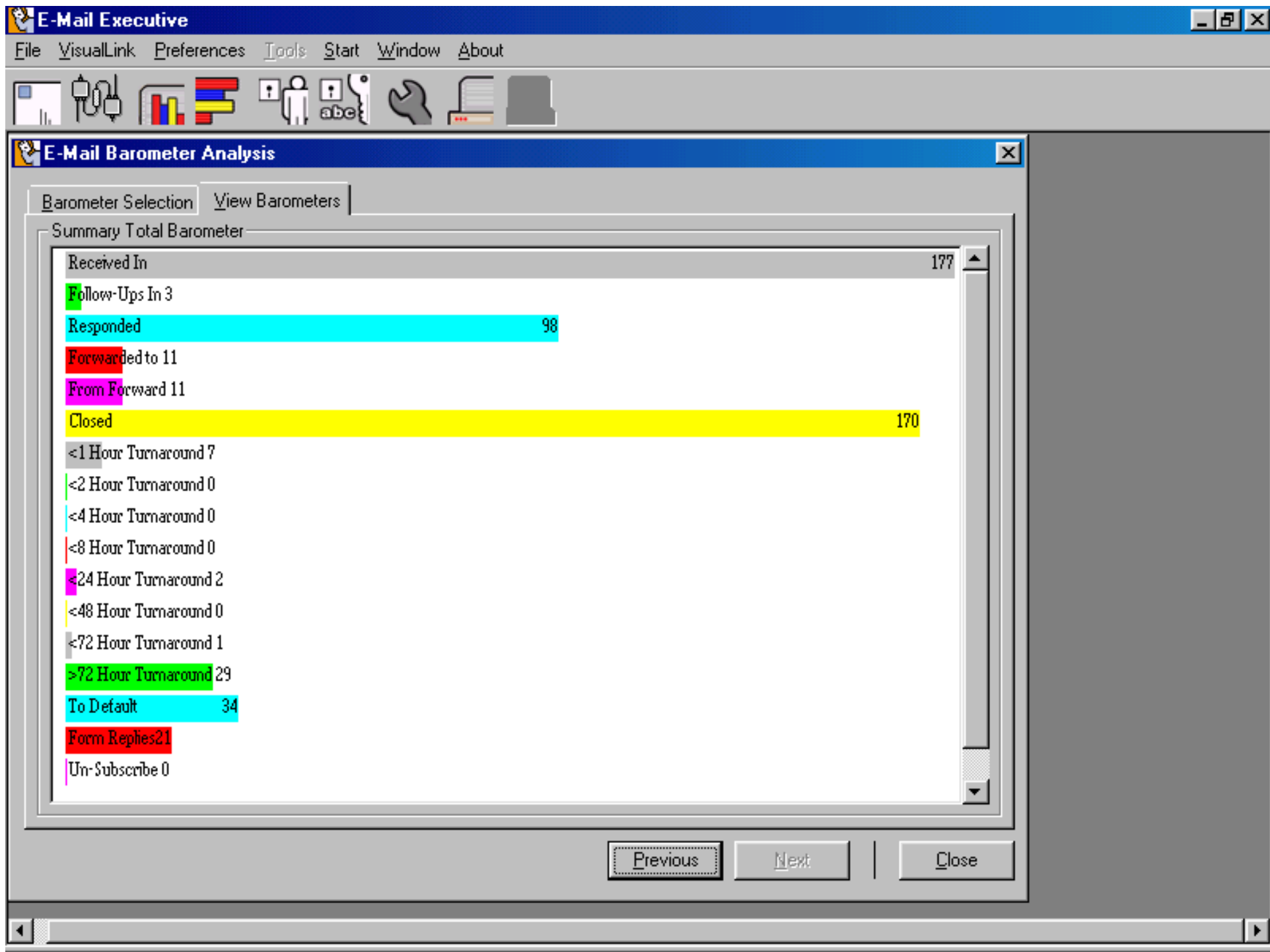
Xfer

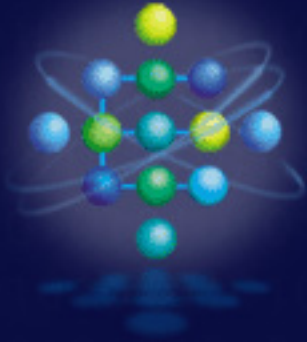
Check

Delete

Submit

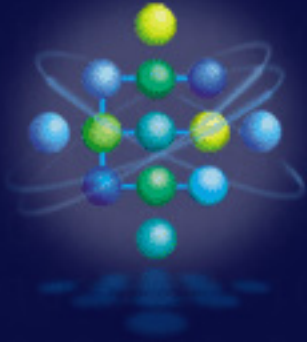
Close





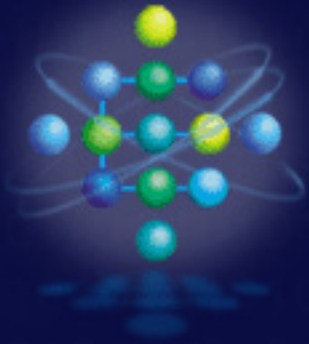
# Training Services

- Regularly scheduled classes
- Customized Client Training
  - At our facility or yours
  - Specific to your business
- Annual World Conference
- Schedule and Registration
  - [www.ecometry.com/traserv/schedule.htm](http://www.ecometry.com/traserv/schedule.htm)



# Professional Services

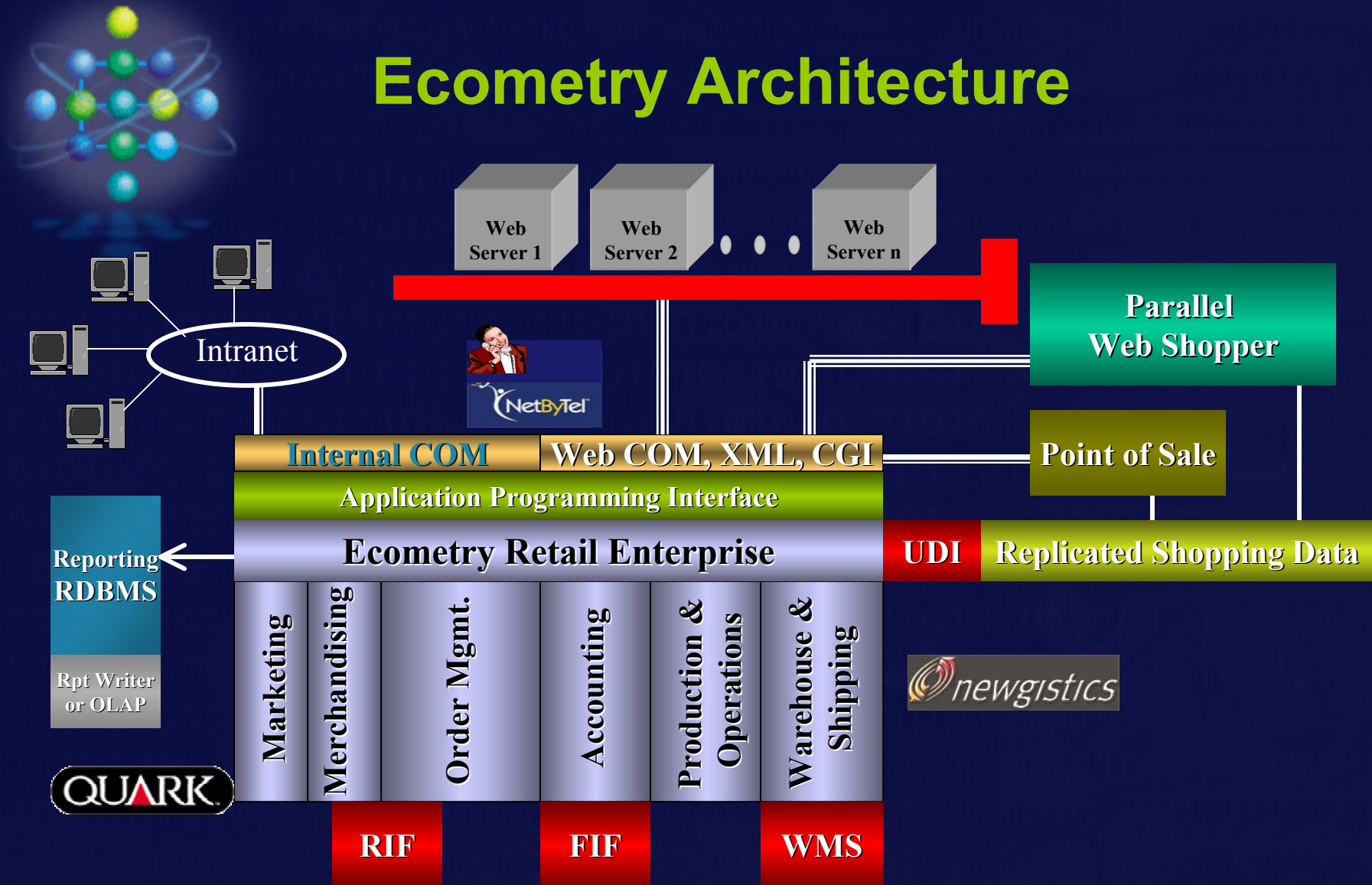
- On-site Business Process Analysis
- On-site Client Audit
- Warehouse Analysis
- Website Design, Development, Consulting
- Business Consulting
- Accounting – Best Practices, Consulting
- Project Management

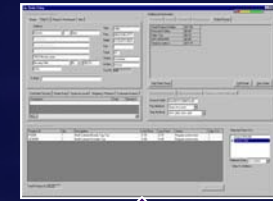
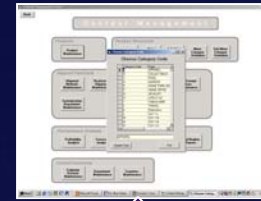
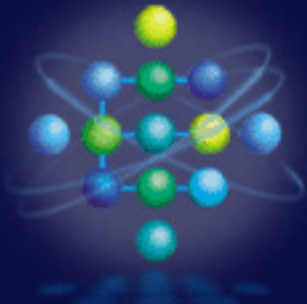


# Platform Migration



# Ecometry Architecture





## All User Interfaces – Full View Functionality

Credit Card  
Processing

### Java & .Net Environment

Picker

Laser Print

Retail

Supply  
Chain

Report  
System

Forms  
System

Postage &  
Handling

Taxation

POS

Universal Data Interchange

Marketing  
Data

Ecometry  
Commerce  
Engine

Parallel  
Web Shop  
Data

Knowledge  
Center

Ecometry Customer Centric Data Layer

Financial  
Interface

COM

Retail  
Interface

XML

Warehouse  
Interface

CGI

### Application Programming Interface

The Future

Ecometry™