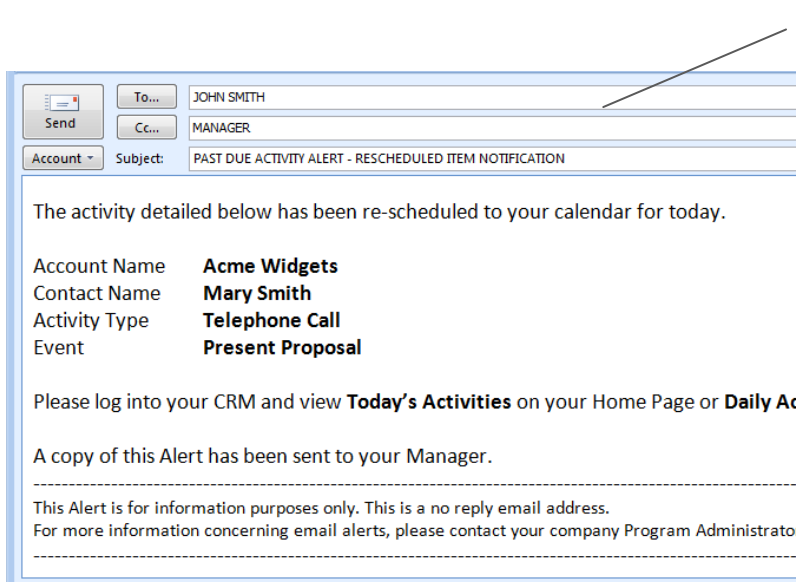


MOSAICCRM Automated 'Account Monitoring and Alert' Program

MosaicCRM provides an automated method to alert Users of changes required to their Pipeline, Account and Scheduled Activity items. The Account Monitoring Alert process covers up to five essential messages and automatically notifies the Owner and reschedules these items together with an email update to the User's Direct Manager. This program is scheduled on a weekly or bi-monthly basis.

1: 'Past Due' Activity Alert – Activities are always current and not forgotten



'Past Due' Activity Alert

- The program will search the database for scheduled activities that have Past Due dates and automatically re-schedule these for the current date.
- An email alert is sent to the Owner of the Activity together with an optional copy to their immediate superior.

The activity detailed below has been re-scheduled to your calendar for today.

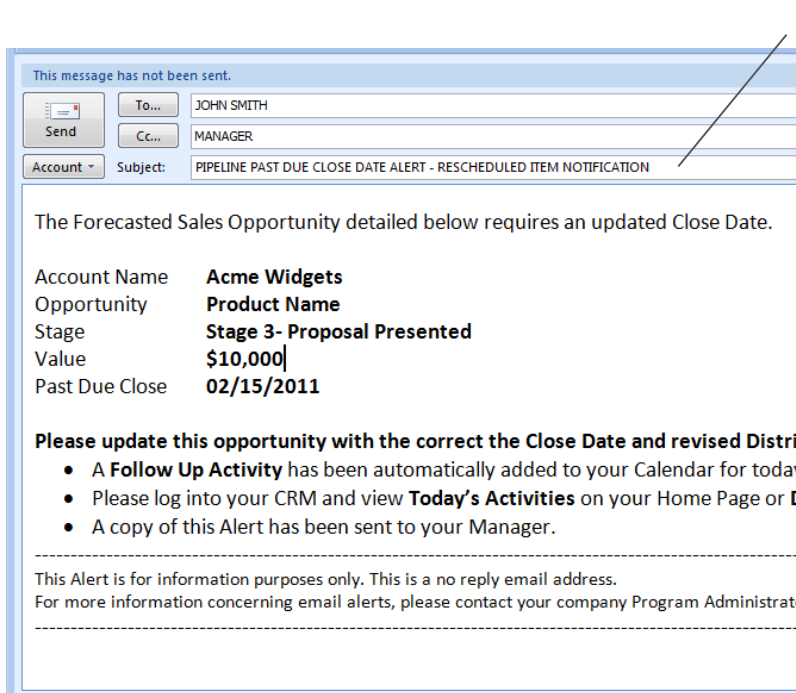
Account Name **Acme Widgets**
Contact Name **Mary Smith**
Activity Type **Telephone Call**
Event **Present Proposal**

Please log into your CRM and view **Today's Activities** on your Home Page or **Daily Activity Manager** to change this scheduled item.

A copy of this Alert has been sent to your Manager.

This Alert is for information purposes only. This is a no reply email address.
For more information concerning email alerts, please contact your company Program Administrator.

2: Pipeline Opportunity Close Date – Keeps Forecast dates accurate



'Opportunity Close Date Alert'

- Pipeline Opportunities are scanned for the scheduled Close Dates and where this date has passed, automatically schedule an Action to follow up on the status of the Opportunity.
- An email alert is sent to the Owner of the Opportunity together with an optional copy to their immediate superior.

This message has not been sent.

To: JOHN SMITH
Cc: MANAGER
Subject: PIPELINE PAST DUE CLOSE DATE ALERT - RESCHEDULED ITEM NOTIFICATION

The Forecasted Sales Opportunity detailed below requires an updated Close Date.

Account Name **Acme Widgets**
Opportunity **Product Name**
Stage **Stage 3- Proposal Presented**
Value **\$10,000**
Past Due Close **02/15/2011**

Please update this opportunity with the correct the Close Date and revised Distribution Schedule if necessary.

- A **Follow Up Activity** has been automatically added to your Calendar for today.
- Please log into your CRM and view **Today's Activities** on your Home Page or **Daily Activity Manager** to view this scheduled item.
- A copy of this Alert has been sent to your Manager.

This Alert is for information purposes only. This is a no reply email address.
For more information concerning email alerts, please contact your company Program Administrator.

3: Pipeline Opportunity Aging Alert - Monitors extended delays in Stage updates

This message has not been sent.

To... JOHN SMITH
Cc... MANAGER
Subject: PIPELINE OPPORTUNITY AGING - RESCHEDULED ITEM NOTIFICATION

The Forecasted Sales Opportunity detailed below has no updated status in the past 90 days.

Account Name	Acme Widgets
Opportunity	Product Name
Stage	Stage 3- Proposal Presented
Value	\$10,000
Close Date	02/15/2011
Last Update	10/15/2010

Please review and update this opportunity. Please change the Stage to '0' – Deal Lost - if this is no longer an active opportunity.

- A **Follow Up Activity** has been automatically added to your Calendar for today.
- Please log into your CRM and view **Today's Activities** on your Home Page or **Daily Activity Manager** to view this scheduled item.
- A copy of this Alert has been sent to your Manager.

 This Alert is for information purposes only. This is a no reply email address.
 For more information concerning email alerts, please contact your company Program Administrator.

'Pipeline Aging Alert'

- Pipeline Opportunities are scanned for the length of time since they were created/last updated.
- For Opportunities where no change in Stage is over 90 days old, an alert is sent to the Owner with a scheduled Follow Up activity to review its status.
- An email alert is sent to the Owner of the Opportunity together with an optional copy to their immediate superior.

4/5: New Lead and New Account Activity Alert – Ensures Activities are scheduled

This message has not been sent.

To... JOHN SMITH
Cc... MANAGER
Subject: NEW LEAD/ACCOUNT ACTIVITY ALERT

The New Lead/Account assigned to you has no current scheduled activity.

Account Name	Acme Widgets
Contact Name	Mary Smith
Last Completed Activity	02/01/2011

A Call Back activity has been scheduled for in calendar for today.

- Please log into your CRM and view **Today's Activities** on your Home Page or **Daily Activity Manager** to view this scheduled item.
- A copy of this Alert has been sent to your Manager.

 This Alert is for information purposes only. This is a no reply email address.
 For more information concerning email alerts, please contact your company Program Administrator.

'New Lead/Account Activity Alert'

- New Leads and New Accounts added by the User are scanned for scheduled activities in the first 90 days.
- Where no scheduled activity is found, an alert is sent to the Owner with a scheduled Call Back activity.
- An email alert is sent to the Owner of the Opportunity together with an optional copy to their immediate superior.