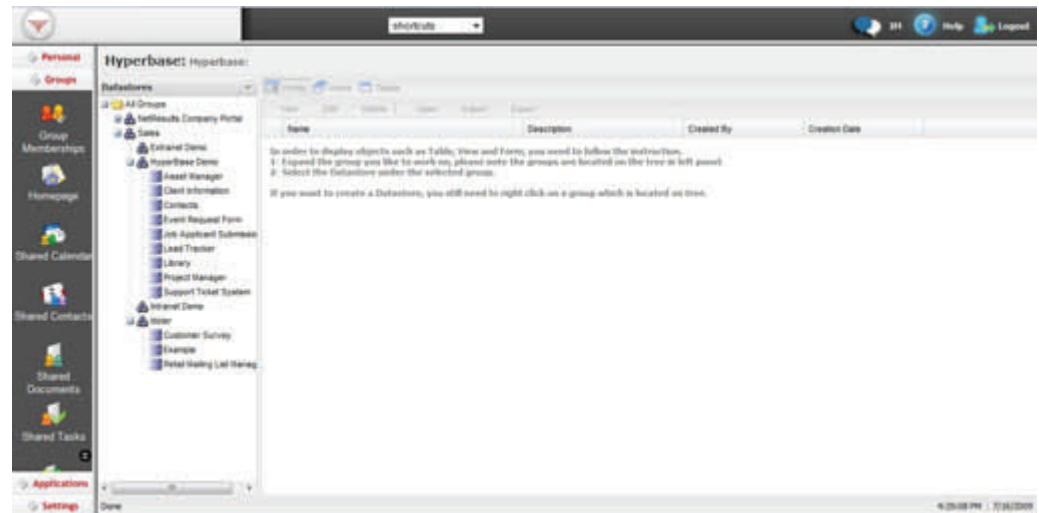




# Using HyperBase to Enhance Business Processes

HyperBase, a fully relational hosted database system, was designed as a highly-customizable business process automation tool to supplement the collaborative suite offering of HyperOffice.

With a familiar HyperOffice user interface and modern AJAX design, HyperBase exists directly in the current HyperOffice portal environment, creating a highly robust and easy to use application builder. With this seamless integration and intuitive user interface, HyperBase is the hosted database for those of us who have limited technical ability, but want to create an automated system to manage their business processes.



*HyperBase is a fluid extension of your HyperOffice portal*

## HyperBase: Function and Features

HyperBase lets you build custom databases, like MS Access, but is much easier to use and is accessible online. Below you will find a few of the features used to automate and enhance business processes. Keep reading to see how these are applied to the complete HyperBase and HyperOffice products.

HyperOffice  
Collaboration Made Simple

### Add Project

Project Information

Please designate the following roles

Project Name: Federal Plaza

Completion Date: 7/17/09

Project Notes: Don't forget to touch base with foreman.

Booking Agent: Craig@hyp.com

Traveler: john@hyp.com

Admin: Craig@hyp.com

Project Manager: Craig@hyp.com

Submit

Company	FirstName	LastName	email	Phone	Notes	Assignment	Gene
Company	Brian	Franco	ptaneja@hyperoff	555555555	This a web lead, it	This looks like a go	Web
GI	Dan	Lo	d@l.com	3726	I am interested	This is a good lead	Web
Main Street Homes	David	Lanagan	dlanagan@hyperoff	8054578	This is good lead	Please follow-up at	1
DL Design	David	Lanagan	dlanagan@hyperoff	458796532	Details	Details	1
David Inc	David	Lanagan	David@david.com	432528352	This product is nice	This looks like a gre	1
David Inc	David	lanagan	d@f.com	2162536	This is a great prod		2

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### Web Forms

Collect data from visitors of your public website through an online form.

### Easy Import/Export

Simply upload your Excel document into HyperBase to watch your data come alive.

### Email Notifications

Send automatic confirmation emails and receive notification emails when data is updated.

### Custom Views

Create multiple views of your data to populate only the most relevant information.

## What can HyperBase do for you?

The rapid advancement of technology in the 21<sup>st</sup> century has made it increasingly difficult for companies to remain on the cutting edge as a means to stay ahead of their competition. HyperBase is here to help.

With automation, companies are able to increase their output while maintaining a slimmer workforce. Detailed accounts of project statuses and live status updates are provide a culture of increased accountability. This not only allows organizations to operate effectively with fewer employees, but it also makes the remaining employees more accountable for their input and thus more productive.

As an organization that works closely with thousands of small to mid-size businesses, HyperOffice understands that the bottom line is always the defining factor in each decision, which is why HyperBase was built with this practical business concept in mind. Every aspect of the HyperBase system was designed to assist our customers in reducing their bottom line and creating a more functional work environment.

## HyperBase : Common Applications

HyperBase is designed to enhance existing business processes; this is accomplished through automation, archiving, remote access and robust access permissions. Provided below, you will find a few examples of some of the most common HyperBase applications among our customers.

### Lead Tracking System and CRM

#### Overview

CRM applications are among the most popular SaaS solutions, and perhaps the most common HyperBase application. The lead tracking system is a small scale Customer Relationship Manager with integrated workflow to manage a prospect through a sale cycle and even post purchase through ongoing communication and status updates. Often this HyperBase CRM is integrated with a lead tracking system or a support ticketing system to create a one stop resource for all of your prospect and client interaction.

#### Challenge

Often businesses approach HyperOffice looking for a system to manage their unique sales cycle. Surprisingly, many of these organizations still rely on physically circulating documents throughout the office or shared spreadsheets to manage their leads. With the pace of business rapidly increasing, electronic automation is not only becoming standard, but essential for the longevity of any business in the digital age.

#### Solution

A HyperBase Lead Tracking System is designed to automate and streamline an organization's unique sales cycle. In the most common implementation of a HyperBase Lead Tracking System, the process would be initiated with the lead input, it would then be assigned to a representative internally. Following assignment, the lead would be updated through the stages of the sales cycle and notes would detail its progress until the lead is marked as closed or lost. To increase accountability, management has a searchable master view of the system that allows them to check the status of any lead regardless of status or assignment.

*Web forms or a excel import initiate the process*

*Fully customizable automated emails keep your prospects informed*

*Manage the status of leads as they progress*

### Typical Lead Tracking Process

#### Lead Input:

With HyperBase the input of leads to initiate the process may be accomplished two ways, the first is through a web form that may exist on your public website or internally that allows for the visitors of your site to input their own information and place requests, the second way is through a spreadsheet import contacting lead contact details. These methods may be used together or independently depending on your desired scenario. Automatic email notifications are often used at this stage as a confirmation for the prospect submission as well as an internal notification of a new lead.

#### Internal Assignment/Initial Qualification:

Once the lead has been entered into the system it is placed in a list of unassigned leads. From this point, an individual designated to distribute the leads is able to attach notes to the new lead and assign it to a sales or marketing representative internally.

### Initial Contact:

Once the lead is assigned to a sales representative, they will receive an email notification to inform them that a new lead exists in his online HyperBase lead list. From this point the representative may work from their list to contact the leads assigned to them and update the leads with applicable notes.

### Status Update:

Once the lead is placed in process by the sales representative, HyperBase allows you to automate the sales cycle based entirely on your individual business needs. Notes and status updates may be made at anytime to assist through the sales cycle.

### Closed Leads:

Leads remain in the status update list until they are closed by the representative. At this point, the Lead Tracking System may be integrated with a CRM to manage the ongoing relationship with the client.

## Support Ticketing System

### Overview

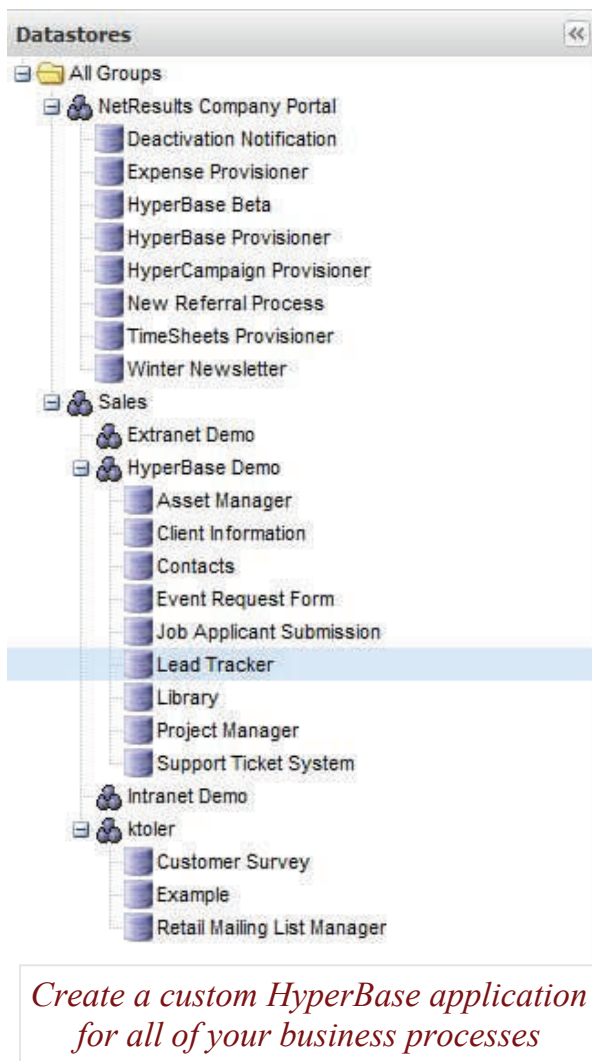
The Support Ticketing system has been used to streamline the submission and processing of requests internally within an organization and also as a client ticket system. Typically, the support ticket system is applied within the IT, billing, or client support departments.

### Challenge

As support teams struggle to manage internal company and external client requests, it is essential that a strong system is in place to see each request through its completion and document effectively. The management of requests internally within an organization are often initiated through email and managed individually— frequently designated by department. Common examples of these business processes include billing requests, technical support requests and client requests.

### Solution

A HyperBase Support Ticket System is designed to automate and streamline a request and follow-up process internally within an organization or department. In its most common implementation, the Support Ticket process would be initiated with the initial request, it would then be assigned to a support representative internally, following this the ticket would be updated through the applicable steps and escalated in necessary, and notes would detail its progress until the lead is marked as resolved. To increase accountability, management has a searchable master view of the system that allows them to check the status of any ticket regardless of status or assignment.



## Typical Support Ticket Process

### Ticket Input:

With HyperBase the input of a ticket initiates the process may be through a web form that may exist on your public website or internally on a company intranet portal.

### Level Assignment/Initial Qualification:

Once the ticket is created, it is placed in a list of new and unassigned tickets. From this point, an individual designated to manage the assignment phase qualifies the ticket, adds notes and assigns it to a Level 1 support representative for follow-up.

### Initial Review:

Once the ticket is assigned to a sales representative, they will receive an email notification to inform them that they have been assigned a new ticket and any notes that were attached by their manager would be included as well. From this point the representative may work from their ticket list to work on the leads assigned to them and update them with applicable notes.

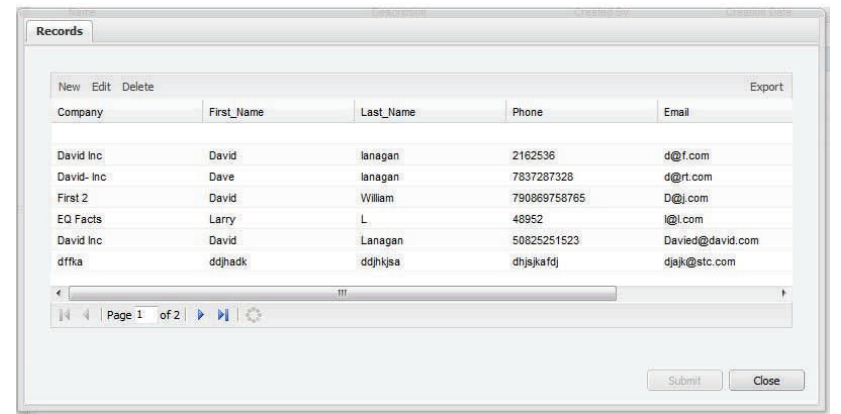
*Easily update the status of tickets and add comments with user stamps and timestamps.*

### Status Updates and Escalation:

Once the ticket is placed in process, HyperBase manages the ticket through status updates and escalation to different levels of support or management. From this stage, much of the status updates and notation occurs.

### Closed Tickets:

Once a ticket is marked as closed it is transferred into a searchable list of closed tickets. At this point, the Support Ticket System may be integrated with a CRM to manage the ongoing relationship with the client.



Company	First Name	Last Name	Phone	Email
David Inc	David	Ianagan	2162536	d@f.com
David- Inc	Dave	Ianagan	7837287328	d@rt.com
First 2	David	William	790869756765	D@i.com
EQ Facts	Larry	L	48952	l@i.com
David Inc	David	Lanagan	50825251523	Davied@david.com
dfka	djhadk	djhjsa	djhjsa	djjsa@stc.com

*Search and filter tickets by status or assignment to update the status*

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## Other Common HyperBase Applications

### Asset Management System

Manage your business assets in a system that allows for status updates, custom fields and robust search functionality.

### Job Application System

Streamline your hiring process by using an online application form with automated workflow on the back end.

### Project Management System

Fully automate a recurring process with email notifications and dependant tasks.

### Web Request Form

Create a simple web request form to be placed to gather requests from visitors to your website.

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