

# Classys Sales Automation

## **Overview**

# CONTENTS



- Classys Sales Automation .....3
- Automatic Configuration of Products & Services .....4
- Benefits. ....6
- The Classys Configurator Application .....8
- Creating a Configurator Application. ....10
- Changing a Configurator Application. ....12
- The Classys Sales Automation Toolbox .....14
- Classys Platforms and Connectivity .....20
- Summary .....22



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## CLASSYS SALES AUTOMATION

Classys is an enterprise-wide software solution that automates the configuration and pricing of products and services, and catalogs them electronically. Once customized for your company, Classys integrates data from all parts of your organization to quickly provide accurate information to employees and customers.

Classys:

- assembles product features and components into configurations with 100% accuracy
- adds, changes, and deletes items or features interactively while maintaining the integrity of the configuration
- computes prices interactively as the configuration changes
- integrates information from customer, configuration, and catalog databases
- generates output including quotes, proposals, orders, and bills of material
- supports Windows<sup>®</sup>, Macintosh<sup>®</sup>, Unix<sup>®</sup>, and OS/2 platforms in stand-alone, networked, and laptop environments

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## AUTOMATIC CONFIGURATION OF PRODUCTS & SERVICES

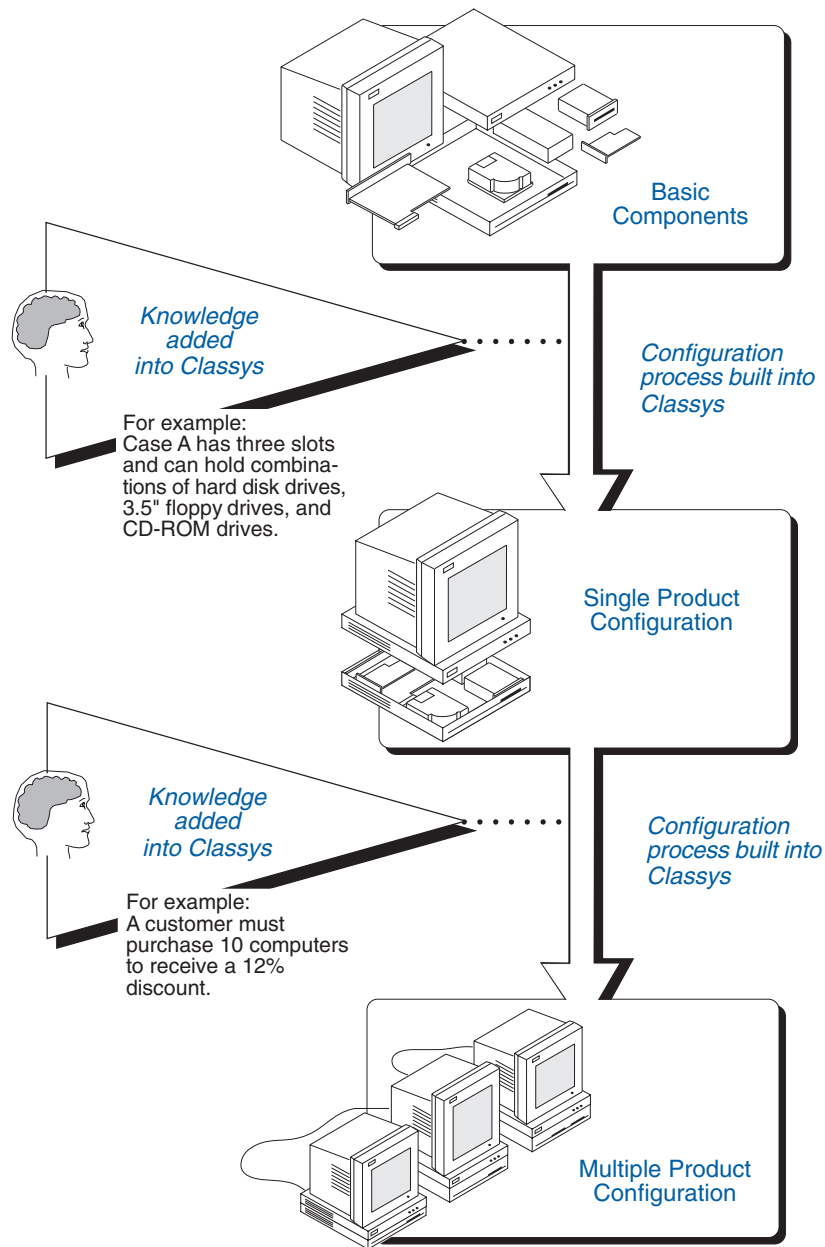
A company's business rules and processes provide the foundation of each Classys installation. Antalys engineers, with input from company personnel, encode the rules and processes of the business into the software. Once this knowledge is in place and the system is tied into company inventory data, a salesperson working with a customer cannot release incorrect information.

Figure 1 shows how Classys automates the business rules and processes of a company that sells computers, putting the knowledge of the company's best business specialists in the hands of each employee.

Whether employees are traveling to customers or working at the home office, all the information they need to satisfy the customer is at their fingertips. This is the Classys competitive edge.

As business conditions change, a company can easily update the Classys installation to reflect new inventory, pricing structures, product configurations, and so on. Every employee, and through them every customer, has immediate access to the latest information.

If your company contends in competitive markets, ships complicated products, or experiences difficulty in communication, Classys has several advantages that will make your operations run more smoothly and more effectively.



**Figure 1. Classys automates the product configuration process.**

*Classys puts the knowledge of your best product specialist in the hands of each employee.*

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## BENEFITS

The benefits of the Classys system are extensive for sales and technical support personnel. Classys dramatically reduces or eliminates administrative costs and manufacturing errors, while improving customer satisfaction, revenue, and profits.

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### Increased Efficiency

Your sales force is more effective and efficient. Representatives provide customers with accurate information more quickly than ever before. Your customers will appreciate getting the answers they need the first time they ask.

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### Reduced Expenses

Employees that use an error-free system require less supervision and less conflict-resolution intervention from managers. Because the system allows employees to work faster and more efficiently, each employee can support more customers with better-quality service.

Classys empowers your employees to make decisions on their own, without having to route them up the ladder. This gives your employees greater job satisfaction.

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### Expert Knowledge

Classys puts the knowledge of your best specialists into the hands of each employee. Customers no longer need to be shuttled from one person to another to get problems solved.

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### Customized to Grow With You

Classys is extremely flexible — as the rules of business change and your company grows, Classys grows with you. Imagine a system that will never need to be replaced, regardless of your growth rate or the addition of radically different products or services.

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### Ease of Use

Classys is designed to be simple for employees to use. Because the software reflects current business practices, employees do not need to change what they do, they just learn a faster way to do it.

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## Simple to Maintain

Business is change, and it is easy for you to make Classsys stay current. On-site personnel who do not have a technical knowledge of Classsys can make needed modifications to the system to meet changing conditions. You won't need to bring in a team of outside technicians each time you add a product line or update pricing structures.

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## Connects to Your Existing System

Your organization has a large investment in database and inventory control systems. Classsys provides a universal front end for these existing systems that knits all business components into one integrated package.

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## Implemented Easily

Because Classsys is an off-the-shelf product rather than a completely custom project, the system can be up and running quickly. Also, today's computer-literate employees will already be familiar with the standard interface elements that make up Classsys, so end user training is quick and painless.

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## Eliminates Paper Product Catalogs

Aside from the obvious benefits of eliminating printing costs, no more paper-based product and sales catalogs means increased efficiency for employees, more up-to-date information, and decreased pressure on the environment.

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## Available on Multiple Platforms

Whether your employees are used to working on Windows<sup>®</sup>, Macintosh<sup>®</sup>, Unix<sup>®</sup>, or OS/2 computers, Classsys allows them to get up to speed fast without having to learn a new system.

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## Quick Return on Investment

Because of the tremendous increase in efficiency, Classsys typically pays for itself in less than a year. And while improved bottom line alone is attractive, Classsys also provides intangible benefits — increased customer and worker satisfaction.

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## THE CLASSYS CONFIGURATOR APPLICATION

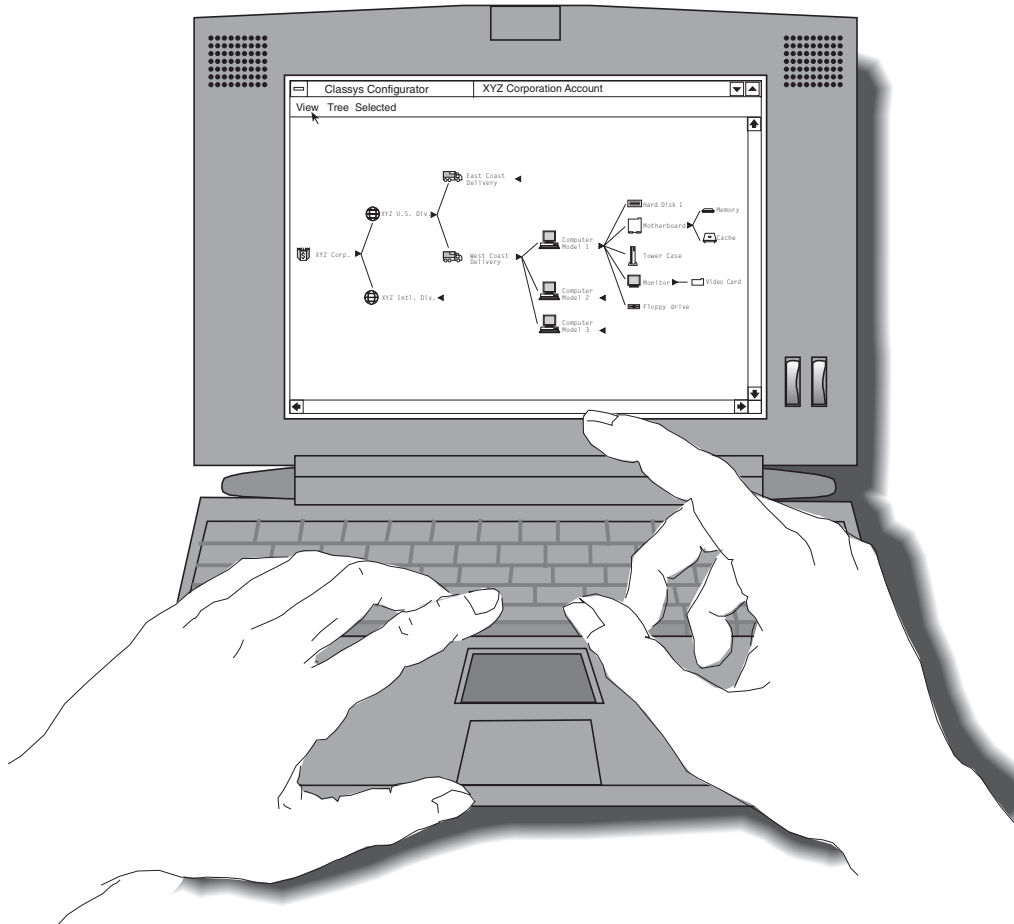
The Classys system produces the Classys *Configurator*, a customized application that automatically configures and prices products and services, and catalogs them electronically. Figure 2 shows a Classys Configurator for a hypothetical computer manufacturer.

Customer service and sales representatives that work directly with customers are the end users of the Classys Configurator.

While the Classys system is an extremely sophisticated application development environment, the Configurator application that end users work with is simple and self-contained.

*The Configurator combines all of your company's years of business savvy and technical know-how into one easy-to-use application. Your frontline people provide accurate, timely information to customers — information that gives you the Classys competitive edge.*





**Figure 2. Working with a Classys application.**

*The Configurator, the application that end users work with, is simple to use and as friendly as your application specialist can make it. The application can run on desktop computers at the home office and on portables in the field. Customers are impressed by the speed and ease with which sales reps produce complex product configurations.*

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## CREATING A CONFIGURATOR APPLICATION

All Classys installations are set up, defined, and used in basically the same way. Details differ from company to company, but the fundamentals are the same. Basically, there are two types of Classys users: the *application specialist* sets up the Classys Configurator application for the *end user* who works with the customer.

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### The Application Specialist

When installing Classys, a company selects an *application specialist* to perform key setup functions, capture company knowledge, and control data. This person, normally a company employee, needs to understand the processes and rules of the business but does not need a background in application development. The intuitive development modules in the Classys system take care of the technical side of the installation.

The setup process precedes field use of the Configurator application, and maintenance continues as product information changes.

The application specialist uses the development modules to tailor the Configurator application with which the end user works. These modules are introduced on page 14.

The application specialist performs four basic functions:

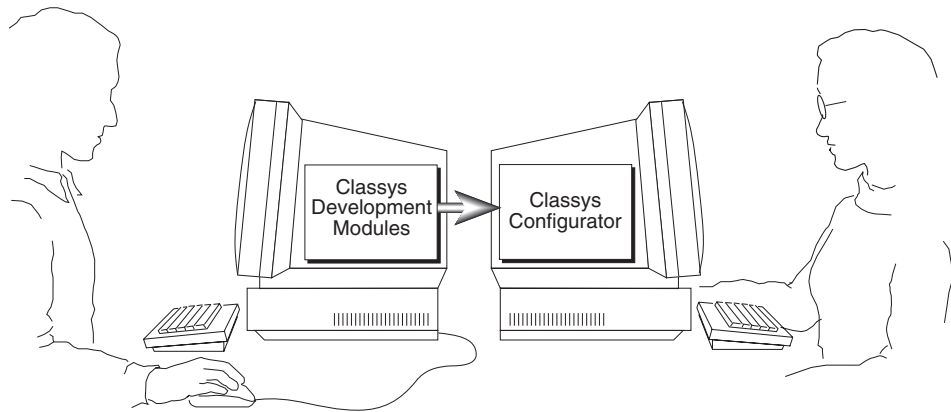
- Analyzes the business products and procedures
- Defines product classes, structures, behaviors, and user interface requirements using the Classys development modules
- Creates baseline configurations and tests the product behaviors and constraints using the Configurator module
- Creates templates that format end-user reports using the Output Manager module

## The End User

The end user, typically a customer service or sales representative who works with the Configurator application, does not need to know anything about the development modules in the Classsys system. The Classsys Configurator application integrates seamlessly into end users' daily tasks to provide better customer sales and service.

The end user performs two basic functions:

- Generates configurations using the Configurator application
- Produces reports (sales quotes, bills of material, proposals, and so on) using the Configurator application



### APPLICATION SPECIALIST

- Product Analysis
- Product Definitions
- Baseline Configurations
- Templates

### SALES REP

- Site-Specific Configurations
- Reports (Bills of Material, Quotes, Proposals, etc.)

### **Figure 3. Classsys users.**

*The application specialist codes company-specific knowledge into the Classsys system using a suite of intuitive development modules.*

*The only application that an end user needs to understand is the Configurator. This application, with an easy-to-use interface tailored at your own company, contains the accumulated knowledge of your entire product line — all at the fingertips of each employee!*

*Also, information can flow both ways. The application specialist can improve service to customers by adding valuable feedback from Configurator end users into an updated release of the Configurator.*

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## CHANGING A CONFIGURATOR APPLICATION

One of the greatest strengths of the Classys system is its flexibility. Nothing is ever set in stone.

Imagine that the system is in place; all your business procedures and products are coded into the Classys system and your customer service and sales representatives are using the Configurator application to satisfy your customers' needs.

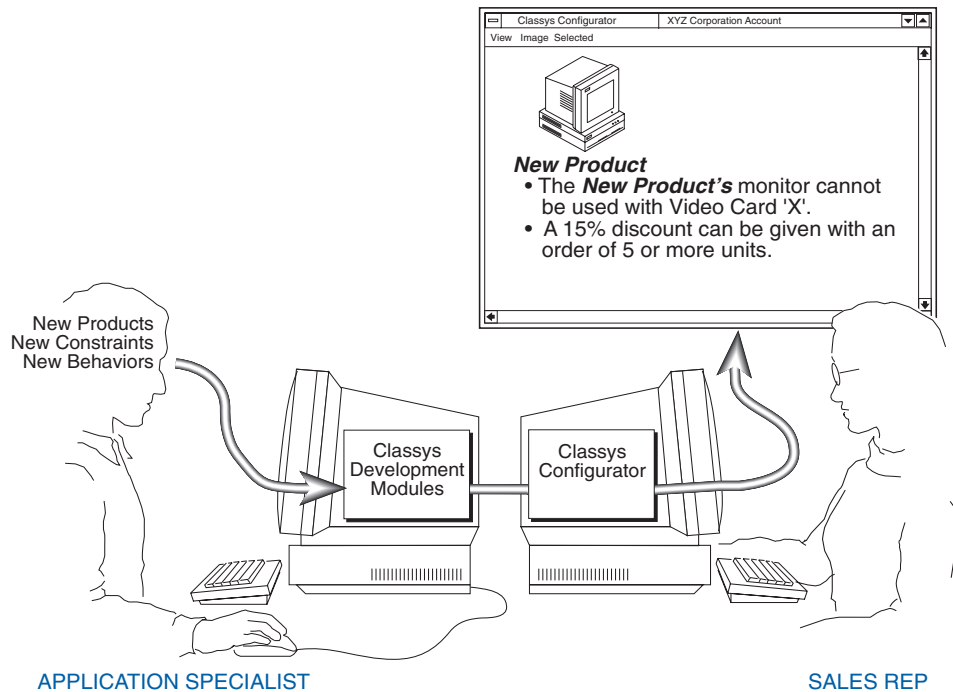
What happens if you add a new product line? Do you have to go through the time-consuming and expensive process of making major programming changes to the system? No. With Classys, updating the Configurator application is fast and economical. You have room to grow.

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### Room to Grow

There is no change to business procedures or products that can invalidate a Classys installation. While your employees continue to use the existing Configurator application with existing products, your application specialist works behind the scenes to add the functionality required to handle the changes. A new product line would simply appear to the end user as a new option in the Configurator application.

Figure 4 shows an application specialist adding new product configurations, constraints, and behaviors to the Classys system. This information is made available to employees faster than ever before — with no chance of mistakes.



**Figure 4. Classys changes with the times.**

*New information is quickly coded into the system and released to end users, so incorrect information is never presented to customers. As soon as a new product line is released, for example, sales reps have all options and restrictions available and can answer customer queries immediately and accurately.*

## THE CLASSYS SALES AUTOMATION TOOLBOX

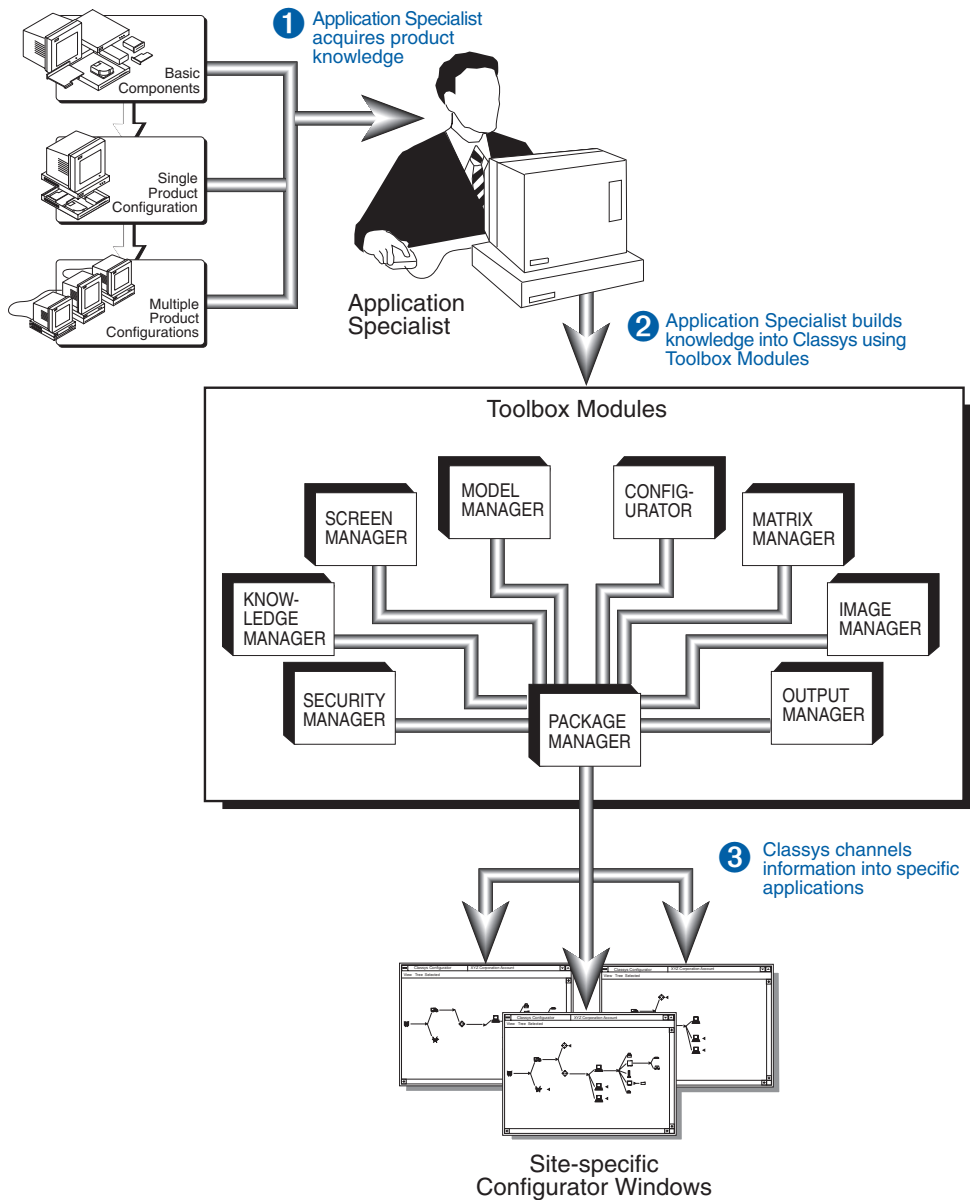
End users of a Classys system work with only one application — the Configurator. Its intuitive user interface allows them to access all of the configuration, pricing, inventory, and delivery information specific to their work environment. But that application is the product of several development *modules*; each controlling a specific function of the Configurator application. A brief description of each of these modules is included here to give you an idea of the structure of a Classys system.

Remember that it is the application specialist who uses the development modules to create the Configurator application for the end user. Because the Classys system is designed to be easy to use, application specialists do not need any formal training in application development. Their primary knowledge is of their company's business.



*The Classys toolbox: the tools used by the application specialist to customize Classys to a specific company. Each of the icons in the toolbox accesses one of the development modules.*

Figure 5 shows the way in which Classys integrates the information created by each of the modules to produce a Configurator application for a specific company. This modular approach enables a company to have several versions of the Configurator, each with its own set of features, products, and procedures. This is another example of how a single installation of Classys can address several business needs, and then adapt to suit changing conditions.



**Figure 5. The Classsys development modules.**

*The application specialist uses the modules to create multiple versions of the Configurator for different end users. Because the modules are easy to use, knowledge of the business is more important than technical ability.*

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## Configurator



Both the application specialist and the end user use this module to create product configurations. The application specialist creates baseline configurations that the end user tailors for specific customers. The application specialist builds the baseline configuration by using the features and functions specified via the Screen Manager — combined with the behaviors specified via the Knowledge Manager. Constraints from the Knowledge Manager are imposed to ensure that end users' configurations are always complete and accurate. The application specialist also tests the Configurator before releasing it to end users.

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## Knowledge Manager



The application specialist uses the Knowledge Manager to define product data, configuration behavior, and product structures. The Knowledge Manager is flexible, easy to use, and easy to maintain. It is the control mechanism for data, constraints, and behaviors.

This is the module that integrates information specific to your company into the Classys system, such as information about your company's product line.

### Constraints

Imagine that a computer manufacturer can place a maximum of three hard drives in a certain computer case. The knowledge programmed into the system would prevent a sales representative from selling a fourth hard drive to a customer that already has three installed.

### Behaviors

Once a configuration is complete, the Configurator might automatically request verification of the customer's billing and shipping addresses. This information, perhaps date-stamped for authenticity, could be mandatory for closing the sale.



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## Screen Manager



The application specialist uses this module to create the company-specific interface seen by end users. Each Classys installation has a standard menu bar and other common interface elements, but many elements can be tailored to specific companies.

The full array of graphical elements are available and can be linked to the product database defined for your company. Multiple versions of the Configurator application can be maintained for different types of end users, each with different types of graphical user interfaces. (This is the advantage of Classys' modular approach: elements created by each of the modules can quickly be recombined to provide different end users with the functions and features they need.)

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## Model Manager



The application specialist uses the Model Manager to define the nature of a specific installation. For example, if the installation is for a computer manufacturer, the Model Manager would define hard drives, computer cases, monitors, and so on — the components of the system. If the installation is for a clothing manufacturer, this module would define suits, shirts, and skirts.

When a new line of products is introduced, the application specialist uses the Model Manager to update the options available to the end user. It is in using this module, as with the Knowledge Manager, that the application specialist's familiarity with the company is most important.

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## Security Manager



The application specialist uses the Security Manager to control the access that different end users and groups have to the system. For example, an end user in the Sales group might have the ability to view and change configurations, while an end user in the Accounting group might have view-only privileges. All end users have unique user names and passwords, established via the Security Manager.

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## Package Manager



A *package* is made up of elements created by each of the development modules (an interface from the Screen Manager, security provided by the Security Manager, a set of rules provided by the Knowledge Manager, and so on). Each end user is associated with a package of information. Because these elements can be combined in many different ways, the system is readily customizable for individual end users *within an installation*. When an end user logs onto the Configurator application, it recognizes the name and loads the appropriate package for that end user.

This module embodies the flexibility that Classsys provides to address a variety of sales situations within your company.

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## Matrix Manager



This module performs a cataloging function unique to Classsys. The Matrix Manager provides logic that manages configuration properties for elements, independent of their part numbers. The application specialist uses this module to generate the rules that govern when parts *must* go with other parts, when parts *can* go with other parts, and when parts *cannot* go with other parts. For example, if a customer ordered a component that required a special cable, the Configurator would alert the sales representative.

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## Image Manager



One of the viewing options in the Configurator application lets the end users see pictures of those configuration items that can be represented graphically. The application specialist uses the Image Manager to create icons by capturing them from the screen, and to specify the way in which they are displayed when the end user chooses to view the images.

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## Output Manager



The application specialist uses the Output Manager to create templates with which the end user formats reports for screen viewing or printing. The Output Manager can produce sales quotes, proposals, and other reports tailored to your requirements.

For example, a sales representative needing to print a monthly sales report with information such as quantities, ship dates, customer names, and so on, would simply choose the “Monthly Report” template established by the application specialist. All required information would be automatically pulled from the Configuration and formatted for easy reading.

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## CLASSYS PLATFORMS AND CONNECTIVITY

The Classys system is a complete, cross-platform solution. Whether you work in Windows<sup>®</sup>, Macintosh<sup>®</sup>, Unix<sup>®</sup>, or OS/2 environments, the look and feel of Classys stay the same.

While maintaining the same interface across multiple platforms, Classys utilizes the unique advantages of each environment. For example, if you don't like using the mouse in Windows<sup>®</sup>, all commands have accelerator keys that enable you to work exclusively with the keyboard.

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### Classys in the Field

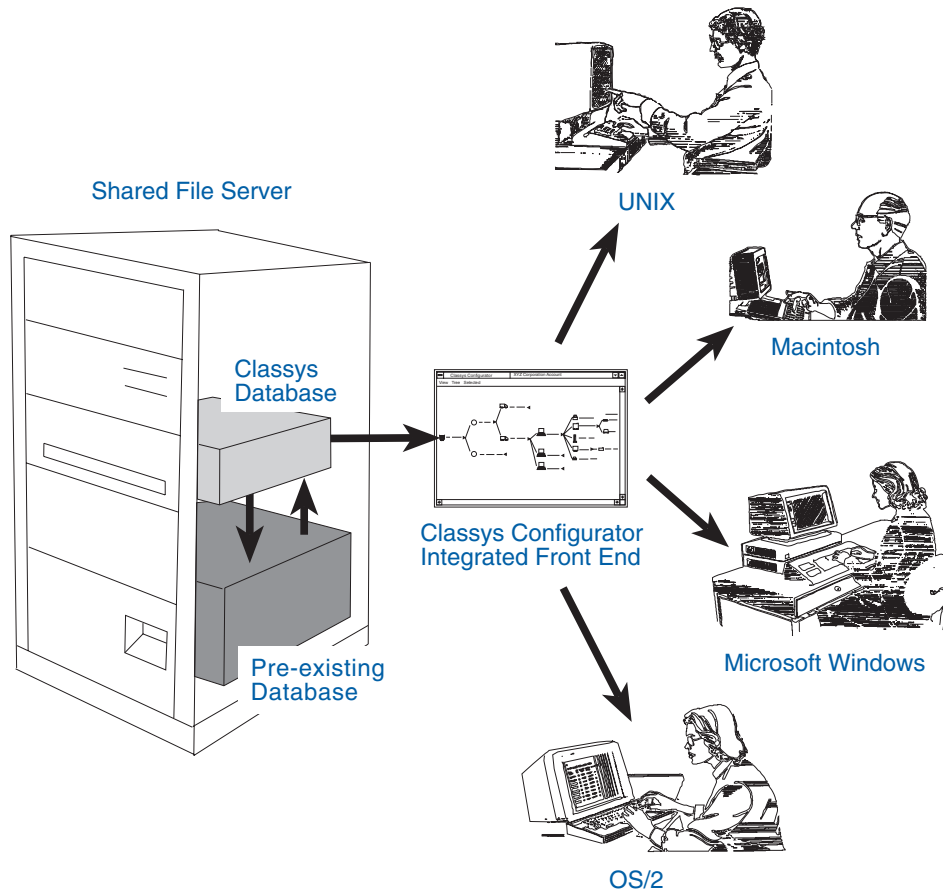
Field representatives, by definition, frequently work away from the home office. No longer do they have to be out of touch with the latest changes to information about product availability, configurations, and pricing. Classys “piggybacks” onto several popular remote data transmission programs to provide field representatives with up-to-date information.

For example, the night before making a presentation, a representative can log onto the company's database and download the latest information. The remote version of the Configurator is automatically updated with information.

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### Classys and Existing Systems

Classys integrates with whatever existing systems a company has for inventory tracking, database management, and so on. This means that you will not have to fix things that aren't broken or scrap systems that still work. The Configurator acts as a new, integrated, more efficient front end.



**Figure 6. Classys runs on familiar ground.**

*Classys' unique cross-platform capabilities enable you to retain much of your original hardware investment. From Windows® PCs and Macintoshes® to Unix® workstations, Classys is ready to run in the environment with which employees are most familiar.*

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## SUMMARY

The Classys system provides an integrated, easy-to-use, and extremely flexible configuration application development environment. It lets companies quickly change their business processes and constraints, add new product configurations, enhance their user interfaces, create different interfaces for different users, access new databases, and extend the sales automation solution to meet new needs in dynamic markets.