



MARKETING STYLE GUIDE

For All Print, Web, Audiovisual, Packaging, Advertising, Direct Mail, Signage, Giveaways, and Press Materials

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I. Logos

A. Use of the IPeria corporate logo

The word “IPeria” when used as a product name, and the **IPeria** logo image are trademarks of **IPeria Inc.** (See [Section IV](#) of this Style Guide for a complete list of trademarks and service marks of **IPeria Inc.**) The **IPeria** logo must be prominently displayed on all advertising, direct mail, collateral, signage, packaging, giveaways, press releases, Web and audiovisual materials. The IPeria logo should be used as provided by the Company. No alterations of any kind should be made to the logo. Strict adherence to these Style Guidelines in the electronic or printed reproduction of the images is required.

It is recommended that the logo be used on a white background or in conjunction with a horizontal or vertical bar in PMS color 134 or 1345 (See the [“Corporate Color Guide”](#) for Web and other program conversions). Approved versions for silkscreen printing or embroidery on shirts and hats are available on the IPeria Web site.

The IPeria logo (jpg format):



Minimum Size: When used as a “header” identifier on 8 ½ x 11 inch size pages and sheets, the IPeria logo must be reproduced 2 ¼ inches wide, including TM and “speed lines.” On substrates and sheets of other sizes, use good design sense. Feel free to discuss this and any graphic issue with the Marketing Communications group. All facets of the IPeria logo must be clearly visible and image resolution must be of high quality.

B. Use of the ActivEdge logo

The **ActivEdge** logo must be prominently displayed as detailed below on all advertising, direct mail, collateral, signage, packaging, giveaways, press releases, Web and audiovisual materials that pertain to it. The ActivEdge logo should be used as provided by the Company. No alterations of any kind should be made to the logo. It is recommended that the logo be used on a white background (see the “Corporate Color Guide” for Web and other program conversions). Approved versions for silkscreen printing or embroidery on shirts and hats are available on the IPeria Web site.

The ActivEdge logo (wmf—Windows metafile):



1. Maximum Size: The ActivEdge logo must be reproduced with a horizontal dimension no larger than the IPeria logo when they appear together unless approved in writing by corporate. All facets of the logo must be clearly visible and image resolution must be of high quality.

C. Use of the I-account logo

The **I-account** logo should be in illustrations such as charts and tables on all advertising, direct mail, collateral, signage, packaging, giveaways, press releases, Web and audiovisual materials that pertain to it. The I-account logo illustration is a trademark; however, the term “I-account” should be used in body text without a trademark. The I-account logo should be used as provided by the Company. No alterations of any kind, including rotation, should be made to the logo. It is recommended that the logo be used on a white background (see the “Corporate Color Guide” for Web and other program conversions). Approved versions for silkscreen printing or embroidery on shirts and hats are available on the IPeria Web site.

The I-account logo (jpg format):



1. Maximum Size and Rotation: The I-account logo must be reproduced with a horizontal dimension no larger than the IPeria logo when they appear together unless approved in writing by corporate. The logo may be rotated by no more than 5.5 degrees. All facets of the logo must be clearly visible and image resolution must be of high quality.

D. I can design element

The **I can** design element can be used on advertising, direct mail, collateral, signage, packaging, giveaways, presentations, press releases, Web and audiovisual materials. Its purpose is at least twofold: (1) to imply that IPeria products and services empower our customers and their customers (enabling them to say “I can....”), and (2) to provide a design element that can be used freely to enhance layouts and presentations.

At this writing, the *I can* symbol is considered to be a branding design element, similar to the Nike® Swoosh®, but is not a trademark. This status may change, and when it does, the status will be reflected here.

The I can design element (wmf format):



E. Identity Mark

The following guidelines specify usage of the **IPeria Inc.** identity mark. Any individuals (whether **IPeria** employees, consultants, outside vendors or third parties such as resellers) involved in developing communications, documentation, or packaging related to **IPeria** products must understand and comply with these guidelines

IPeria Inc. should never appear with a comma between the two words even though it is grammatically correct, for consistency with the terminology in the company's incorporation documentation.

IPeria images, logos, and trademarks may not be modified or combined with the trademarks of any other company.

When used by a third party, an acknowledgement line should accompany use of the IPeria logo as follows: "An authorized [distributor, reseller, etc.] of **IPeria** products and services."

G. How to obtain copies of the IPeria logos

1. On the intranet site. The IPeria logos and other images can be downloaded from the Graphics section of the IPeria intranet site.

2. From Marketing Department. Requests for logo art should be directed to lphillips@iperia.com Please state the file format and application.

H. Use of images and corporate logos

Images and corporate logos downloaded from the IPeria Web site may be used solely in conjunction with IPeria products and in accordance with generally accepted advertising and marketing standards.

In promotional materials (ads, direct mail, product boxes), it is recommended to use the appropriate product or award tagline (they will change from time to time). Some awards come with a corporate logo. An updated list of current awards and related logos will be posted on the Web site at <http://www.iperia.com/awards> in eps format

Note: You must have Adobe® Photoshop® 4.0 or equivalent raster program or Illustrator or equivalent vector program to resize an image. A desktop publishing application such as Adobe® PageMaker®, QuarkXPress® or Microsoft® PowerPoint® will allow you to view .eps files.

II. Logotype

A. Product Logos

Use IPeria, ActivEdge, ValuEdge and I-account logo illustrations for display as product names, as provided by the Company, in presentations including, but not limited to, product boxes, print and Web advertising, advertising, documentation, data sheets, catalogs, posters, signage, banners, equipment and CD-ROM labels. No alterations should be made.

B. Product Names in Text

When naming products in body text in presentations including, but not limited to, product boxes, print and Web advertising, advertising, documentation, data sheets, catalogs, posters, signage, banners, equipment and CD-ROM labels, use Helvetica bold expanded 125-130% for subheads and Helvetica regular expanded 125-130% for body copy.

C. Corporate Color Guide

Full-color presentations. In full-color presentations, including, but not limited to, product boxes, print and Web advertising, advertising, documentation, data sheets, catalogs, posters, signage, banners, equipment and CD-ROM labels, the corporate colors are always PMS 134 and 241 on uncoated stock and PMS 1345 and 242 on coated stock. The filenames of all corporate logos are color-coded (ex. "IPeria logo 242") to avoid any confusion. The final color can vary significantly depending on the stock on which it is printed. Web conversions are approximate and will vary from monitor to monitor.

D. Corporate Color Conversion Chart

PANTONE VALUE	RGB	CMYK	WEB BINHEX#
PANTONE 1345	R 254	C 0	FFCC66
(COATED)	G 223	M 13	
	B 155	Y 44	
		K 0	
PANTONE 242	R 106	C 52	660066
(COATED)	G 45	M 95	
	B 93	Y 35	
		K 19	
PANTONE 241	R 172	C 27	660066
(UNCOATED)	G 21	M 94	
	B 120	Y 0	
		K 9	
PANTONE 134	R 254	C 0	FFCC66
(UNCOATED)	G 224	M 12	
	B 137	Y 56	
		K 0	

E. Corporate Color Samples (tif format)



1345

241

134

242



FFCC66

660066

III. Addresses

A. General guidelines

Always include the full corporate name IPeria Inc., the Burlington, MA corporate headquarters address (77 South Bedford Street, Burlington MA 01803), phone number (781-993-3500), fax number (781-993-3536), e-mail address (addressee@iperia.com), and Web site address (www.iperia.com) (also called the URL, or Universal Resource Locator).

In general, also include the international names, and if space is available and if appropriate, the phone numbers, fax numbers, e-mail addresses, and international Web address. It is desirable, but not always necessary to list the street addresses for international offices. If space is limited, use your judgment as to what is included.

IV. Trademarks and Service Marks

Use a TM on the first appearance of any of our marks. Make every possible effort to use a ® or TM or SM as appropriate on the first appearance of others' trademarks. ALWAYS use an end disclaimer.

A. General information

1. Trademark--definition. A trademark is any word, name, symbol, design, means, or device adopted and used by a manufacturer or merchant to identify its goods and distinguish them from those manufactured or sold by others. Colors, sounds, and shapes may also be trademarks if they meet certain requirements.

2. Types of Trademarks and Service Marks. Trademarks are grouped into five different categories. Those categories are listed below in decreasing strength value. In general, the more descriptive a mark is, the weaker that mark will be. In other words, the more a trademark tells about the product it represents, the less likely the law will protect that mark.

Coined - These terms are powerful as trademarks since they are not words in any language and therefore are incapable of being descriptive of anything.

Example: Exxon and Kodak.

Arbitrary - These marks are also quite strong in that they have no connection to the goods or services they identify.

Example: Comet for household cleaner and Camel for a cigarette.

Suggestive - These marks suggest not only the nature of the product but may also suggest a product's source and quality guarantor. A secondary meaning has been acquired by the mark if the purchasing public, when hearing, seeing or reading the trademark, associates the product with a particular product or supplier.

Example: Sheer Elegance trademark, which through vigorous advertising has become associated with pantyhose.

Descriptive - These marks merely describe the goods they represent and are not available for legal protection.

Example: "Brown Box" as a trademark for boxes. "Boxes that are Brown" will not be protected under law.

Generic - Generic terms used to describe items are not protected regardless of any acquired secondary meaning. Also, as noted above, improper use of a trademark can cause it to become a generic word.

Example: Generic words are computer, modem, etc.

3. Service mark--definition. A service mark is any word, slogan or other means used to identify services and the source of those services. Service marks are used in virtually the same way as trademarks.

4. Trademarks, patents, and copyrights. Trademarks are often confused with patents and copyrights. These three rights may provide concurrent protection. The three may be distinguished generally as protecting different aspects of goods or services:

A **trademark** (or service mark) protects the name, title, slogan, or representation of a product (or service) to identify its source.

A **patent** is a grant from a government bestowing the right of the patent owner to exclude others from making, using, or selling the claimed invention. Patents protect the process, function, or design of an invention.

A **copyright** is a grant from the government bestowing a writer with the right to exclude others from copying his or her original expression. Copyrights protect the author's right to copy his or her original literary or artistic expression.

5. Purposes of trademarks and service marks. Trademarks and service marks serve to protect both the consumer and manufacturer of goods and services by identifying particular goods or services or the source of those goods or services. The owner of a trademark or service mark has exclusive use of the mark. This means that the buying public can be assured that goods or services sold under certain trademarks or service marks were made by a particular manufacturer or provider and have certain characteristics regarding appearance, quality, performance, etc.

6. Duration of trademarks. Trademark rights may be of unlimited duration as long as a particular trademark is in continued use and functions to distinguish the goods from others. Misuse or mismanagement of a trademark can cause the owner to lose the exclusive right to use the trademark, leaving it open for others to adopt. Aspirin, zipper, thermos, and cellophane were at one time strong trademarks, but now are generic terms.

B. Legal issues

1. Difference between TM, and SM, and ®.

TM - This designates a common law trademark.

SM - This designates a common law service mark.

® - This designates either a registered trademark or registered service mark.

2. Trademark or service mark legal protection. Common law rights are gained by actual usage of the mark in commerce and are limited to the area of the country where a user can prove actual first use.

Registration of a mark expands the common law rights by giving the registrant nationwide trademark enforcement rights. In order to register a trademark or service mark, the owner of the mark must file a Class 9 application, and use the mark in interstate commerce on a product or in connection with providing a service. Using a phrase in promotional materials that advertise a

product is not sufficient to prove use of mark. For example, Exxon's *PUT A TIGER IN YOUR TANK!* is not a service mark; it is a trademark for gasoline. Exxon affixes the mark on the gasoline tanks or the trucks that transport the gas. IPeria™ and ActivEdge™ are affixed on actual rack and stack hardware. The trademark “upgrade your bottom line™” appears in documentation and on monitor screen interface displays that are an inherent part of the product.

3. Trademark use between more than one company. The company that put first use into the market will be granted rights to the mark and will be able to prevent the other company from using the same or any similarly confusing mark. The key concept is LIKELIHOOD OF CONFUSION as to a particular product or service.

Example: It is unlikely that a COMET computer would be confused with COMET® cleanser. However, if a company started to market a computer telephony product called ActionEdge, that action would be deemed to cause a likelihood of confusion with the IPeria established trademark **ActivEdge**.

4. Protect our rights. If you become aware of a trademark or service mark that is the same or similar to any IPeria trademark or service mark, contact the IPeria Legal Department as soon as possible with the relevant information.

C. How to use a trademark

In general, a verbal trademark is a word or name that must be used as an adjective, not a noun. It should be capitalized, italicized, or otherwise set off from the rest of the text. Some general rules are:

1. In different applications

In extended works, such as articles, documentation, white papers: ® or ™ or ℠ must be used on all first mention of product name or any mark; thereafter, in general, the marks are not needed in subsequent mention(s). If anything is detachable, ® or ™ or ℠ must appear on detachable piece after first mention of product name (e.g., Business Reply Card on a direct mailer).

On direct mail: Use ® or ™ or ℠ on first mention of product name or any mark and on BRC (or anything that is detachable); thereafter, not necessary.

Advertisements: Use ® or ™ or ℠ on first mention of product name or any mark; thereafter, not necessary.

On CDs:

Use ® or ™ or ℠ on first mention of product name or any mark; thereafter, not necessary

On audiovisual: Use ® or ™ or ℠ on first mention of product name or any mark; thereafter, not necessary.

Product boxes: Use ® or ™ or ℠, as applicable, on each panel wherever product name or any mark is mentioned.

On Web: Use ® or ™ or ℠ on first mention of product name or any mark; thereafter, not necessary.

On press releases: Use ® or ™ or ℠ on first mention of product name or any mark; thereafter, not necessary.

2. General rules

Juxtapose a trademark's generic, descriptive, or common name of the product. Test: If a trademark used in a sentence is taken out of the sentence, the sentence should still be correct grammatically.

Proper: The **IPeria I-account** system is a wonderful way to enhance work performance.

Improper: The **IPeria I-account** is a wonderful way to enhance work performance.

Do not use a trademark with an apostrophe as a possessive.

Proper: The features of the ActivEdge™ system are easy to understand.

The market success of **IPeria™** products has been well documented.

Improper: The **I-account's** features are easy to understand.

IPeria's market success has been well documented.

Proper: The ActivEdge™ product line from IPeria ..."

Improper: **ActivEdge's** features are easy to understand ... "

Make every effort not to split a trademark or service mark on two copy lines.

Proper: Be sure to recommend **IPeria™ ActivEdge™** products for best results.

Improper: Be sure to recommend the IPeria Activ-
Edge™ product line for best results.

Do not combine the IPeria trademark with a trademark belonging to someone else. If the **IPeria** trademarks are combined with those of another company, there may be confusion over the **IPeria** ownership of its trademark.

Proper: **IPeria™** and Microsoft® Windows® NT® software....

Improper: **IPeria™** Windows NT applications

Use the appropriate symbols.

™ - This designates a common law trademark.

SM - This designates a common law service mark.

® - This designates either a registered trademark or registered service mark.

The symbols should be used with the mark in all written materials with the first, most prominent use of the mark. The symbols should be used on labels, diskettes, and packaging as well as in collateral, advertising, and manuals.

Review all trademark usage with reference to this Style Guide. Trademarks and service marks must be presented as shown.

NOTE ON INTERNATIONAL USE OF TRADEMARKS AND SERVICE MARKS: If a product is to be sold only in the United States, U.S. registered trademarks should be used with an ®. If the particular product packaging or marketing material is to be used in both the United States and other countries, determine where it is registered. If it is not registered in a particular country, the ™ or SM symbol, as appropriate, should be used with either the English language or international language translation.

D. IPeria common law service mark (marked with SM)

The following slogan, or "tag line," **upgrade your bottom lineSM** is a service mark used in conjunction with the IPeria logo, as shown (wmf format):



E. Official IPeria product names and other trademarks and service mark.

IPeria™ (when used as a brand name)	The ActivEdge logo
ActivEdge™	The I-account logo
upgrade your bottom line SM	
The IPeria logo	

NOTE ON INTERNATIONAL USE OF U.S. REGISTERED TRADEMARKS: If a product having a U.S. registered trademark is to be sold only in the United States, the symbol ® should be used. If the particular product packaging or marketing material is to be used in both the United States and other countries and is not registered in a particular country, the ™ or SM symbol, as appropriate, should be used with either the English language or international language translation. At this writing, this applies to all IPeria trademarks and service mark, which should be used with a ™ or SM symbol, as appropriate.

F. Some frequently used registered trademarks and trademarks of other companies*

3Com®	3DNow!™	ActiveX®	AMD Athlon™
AMD-K6®	America Online®	Corel® WordPerfect®	Creative Labs® Sound Blaster®
Eudora Pro™	Eudora®	GoldMine®	IBM®
Intel®	Lotus® Notes®	Lotus® SmartSuite	Microsoft® Excel®
Microsoft® Exchange	Microsoft® Outlook®	Microsoft® PowerPoint®	Microsoft® Word
MMX™	Palm™	Palm Computing®	Palm III™
Palm III™x	Palm IV™	Palm Modem®	Palm OS™
Palm VII™ organizer	Palm®	Pentium® processor	PowerPoint®
Qualcomm®	ViaVoice™	Visual Basic®	Visual C++™
Voice Xpress™	Win32®	Windows®	Windows® NT®
WordPerfect®			

*All trade names, trademarks and service marks referred to in this Style Guide are the property of their respective owners.

V. Disclaimers

A. Basic Disclaimer

Also known in the vernacular as “mouse type” or generically, as legal clauses. These appear at the end of virtually every marketing piece, e.g., data sheets, catalogs, and direct mailers, after the company name and address section. Disclaimers are set in normal text type, without boldface or italic emphases.

1. When first published:

- **Copyright © 2001 [year of first publication] IPeria Inc. All rights reserved.**

The following should be included, as appropriate:

Prices and specifications are subject to change without notice and may differ outside the United States.

2. Revisions. If a publication is a revision of an earlier publication, the first year of publication for the component pieces needs to be listed, *with the year of first publication separated by the current year by an en-dash*. For example, a copyright date might appear as:

Copyright © 2000–2001 IPeria Inc. All rights reserved.

IPeria and the IPeria logo, and (insert name(s) of IPeria registered trademarked product(s) in country within which material will be used, if applicable – see Section VI-D) are registered trademarks, and (insert IPeria trademarked and service marked name(s) and phrase(s), used in the material – see Section VI-E and Section VI-F, respectively) are trademarks or service marks of IPeria Inc. All other trademarks are of their respective holders.

Example of Disclaimer:

Copyright © 2000–2001, IPeria Inc., All rights reserved. IPeria and ActivEdge and the IPeria and ActivEdge logos are trademarks of IPeria Inc. All other trademarks are of their respective holders. Specifications and prices [if given] are valid in United States [or applicable country] only and are subject to change without notice.

B. Restricted Rights Legend

All worldwide software license agreements must include the following statement to prevent the U.S. government from asserting unlimited free use of **IPeria** software. The statement does not have to be physically printed on packaging or in documentation as long as it is (and it must be) included in the license agreement displayed on-screen by the software:

If any software or documentation is acquired by or on behalf of the United States Government, the Government agrees that such software or documentation is “commercial computer software” or “commercial computer software documentation” and that absent a written agreement to the contrary, the Government's rights with respect to such software or documentation are limited by the terms of this License Agreement, pursuant to FAR § 12.212(a) and/or DFARS § 227.7202-1(a), as applicable.

VI. Messaging Style

A. The basics

1. Speak to the concerns of the customers and markets you are trying to reach. Be positive and use an active voice. Emphasize the benefits to the user. Consider the competition and position our products favorably against the competition. Check facts and spell-check.

Correct: IPeria works with virtually any XML application.

Incorrect: IPeria works with all (or many) XML applications.

Positive Statement: Leading service providers use IPeria™ products.

2. Know the difference among versions, editions, updates, upgrades, and upward migration. A version is a specific release of software; for example 2.0 is a version. An edition is the feature level of the product; for example, “Birch” is an edition of IPeria ActivEdge. An update is the most recent available release of software code, or version; for example, going from 2.0 to 2.1 is an “update.” An upgrade includes major enhancements to the base software and is a higher-numbered edition, for example going from 2.x to 3.x. Upward migration, sometimes called an upgrade path, allows the user to move to an edition of the software having more robust features and functions.

B. Style guidelines

1. Do not use product name(s) as possessives (for example, do NOT use *IPeria's* or *IPeria ActivEdge's* or *Microsoft's*....)

2. State ideas and concepts clearly and succinctly. Use simple, direct speech and simple words, such as “use” (not “utilize”).

3. Use modern language and correct grammar, and avoid stilted language and slang expressions. A simple test for good writing is to read it aloud and evaluate its rhythm and clarity.

4. Writing should meet the standards of a well-written essay obtaining top grades in a demanding college writing course.

5. Minimize contractions. Contractions are not used at all in technical documentation.

6. Choose words carefully to achieve maximum positive effect and interest.

7. Use active words with a customer orientation where possible.

Recommended: IPeria™ ActivEdge™ allows service providers to reduce churn...

Not Recommended: IPeria ActivEdge will change the way the world communicates...

8. Avoid insupportable or promissory statements. Use language that is enthusiastic and supports a professional image.

9. Avoid splitting infinitives (unless it really reads or sounds better, which is sometimes the case), ending sentences with prepositions, misplacing modifiers, and using other awkward or incorrect constructions.

10. In a series of three or more items, use a comma (often called the “Harvard comma”) before the word and.

11. In text that is generally non-numerical, spell out numbers up to and including ten, and express numbers greater than ten numerically, such as 11, 99, etc. However, in generally numerical text,

such as specifications, system requirements, and engineering contexts, numbers are generally appropriate, such as 7 MB, 6 MHz, 3 cm, 1.5 V, etc.

12. A series of items should be ordered in a meaningful fashion, such as alphabetic, chronological, size-ranked, etc.
13. Use commas to separate independent clauses, especially in long sentences.
14. Adopt the first person plural voice for IPeria ("we") and second ("you") or third person ("they") for a reader or user, respectively.
15. Write in complete sentences and not sentence fragments.
16. In general, do not begin sentences with conjunctions, e.g., or, and, but.
17. New, unconventional, or ambiguous terms and virtually all acronyms should be defined/expanded at their first appearance.
18. To resolve questions of grammar, punctuation, and usage, consult *The Elements of Style*, William Strunk & E.B. White, Macmillan 1979; *Style Manual For Authors, Editors and Printers*, or *The Chicago Manual of Style* 14th ed., The Univ. of Chicago Press, 1993, or later.

C. Use of quotations

Check with the source--the publication or person being quoted for approval to use the quotation. Always get the permission in writing. Some publications require a specific attribution to name of publication, name/build of product, and/or issue date, after the quotation.