

Oncontact Software User Conference 2003

Beyond the Basics



Sheraton Chicago Hotel & Towers
Chicago, Illinois
October 1-3, 2003
Register today: 800.886.0866

Beyond the Basics
Oncontact User Conference
A new format

Oncontact's 9th Annual User Conference takes learning to a whole new level. We go beyond training and offer sessions filled with a best-practice approach. Come and join us as we focus on providing examples relevant to your business situation.

Oncontact has years of experience in screen design, data integrity, process development and 3rd party integration. The User Conference is a great opportunity for you to explore techniques, methods and theories with the Oncontact staff in these areas. Several Oncontact customers will also present their project experiences and offer their best-practice methodologies.

In addition, we encourage you to participate in sessions that incorporate discussions designed to pass along our vast experience in providing solutions to customers like you. The opportunity to consult with Oncontact staff regarding your specific project is available as well. Through interactions with Oncontact customers in attendance, you can explore

how they have implemented system integration with CMS. You can also hear their tips and tricks on achieving and maintaining data integrity and learn how to maximize your CMS implementation with analytics.

The three tracks provide new information that enables you to take your CMS implementation to the next level. Whether you are getting started or have been a customer for years, we have multiple sessions designed to help you maximize the effectiveness of your CMS project. Each track focuses on specific phases of the product life cycle with ample time to ask questions in a one-on-one setting, all for less than the cost of one day of on-site training! At the Oncontact User Conference, you can be confident of being challenged while gaining new skills each day.

Also, be one of the first to see the debut of Oncontact IV. Oncontact IV, our next generation CRM application suite, is a .Net application written in Microsoft C#. Take a test drive of the new product and ask questions during this event.

Please accept this invitation to join us in the Windy City to take your CMS project 'Beyond the Basics'. We look forward to sending you home with a greater knowledge of CMS. Call **262.375.5147** or **800.886.0866** to register today.

Beyond the Basics **Oncontact Software**
800.886.0866 **User Conference 2003**

For New CMS Users:

- Learn how to implement and use CMS the correct way
- Gain exposure to all the different features of CMS
- Discover tips and tricks for using CMS
- Meet staff members who can answer your specific questions
- Network with other CMS users

For Existing CMS Users:

- Learn about features that may have been added or improved since your implementation
- Discover ways to incorporate additional functionality into your environment
- Learn to use CMS to streamline job functions thereby making employees more productive
- Meet staff members who can answer your specific questions
- Network with other CMS users



Denotes new classes added this year.

Set Your Course

For users starting their CMS implementation

Features of CMS and eCMS

This session pairs a demonstration of the main features of CMS and eCMS with practice exercises. This demonstration will cover the Enterprise screen, the Contact screen, the Activity Scheduler, the Find screen and other standard CMS 7.0 features. (1 hour)

Work Smarter, Not Harder

This lab incorporates exercises showing quick and easy ways to use CMS to find the information you need. Scenarios range from using some of the more common Find screen operators to query for data to mass-assigning enterprises and contacts to marketing lists. (1 hour)



CMS Administration Tips and Tricks

Learn from those who went before you. Make the administration of CMS go smoothly by learning some techniques presented by our seasoned product experts. This lab

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contains exercises in the following areas: adding action and result codes, defining users and adding global parameters to CMS. (1 hour)



Data Integrity Through Imports and Deduplication

Make the CMS Import and Deduplication utilities work for you. Learn how to simplify the import process while maintaining data integrity. (2 hours)

Securing Your Critical Data

Learn the hows and whys of setting up security for users and user groups. This lab will give students practice establishing security requirements for enterprises, contacts, queries and activities. (1 hour)



CMS Screen Design Techniques

This presentation highlights the best practices used every day by our Professional Services staff to design and customize CMS screens. This is a screen design, and not a screen development, lab. (1 hour)



Support Module in Action

Find out how you can use the CMS Support Module and the ClientNet application to enhance the productivity of your support group. Our Support Manager, Tom Strong, will demonstrate how Oncontact uses CMS to handle its support calls and how the ClientNet tool can help you find immediate answers to your questions. (1 hour)

Connecting With Your Remote Users

This session combines a presentation with hands-on exercises focused on the sync process and sync options available within CMS. Students will take part in creating the template and host databases, as well as discuss the maintenance of Sync CMS after implementation. (2 hours)

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Expand Your Horizons

For those users looking to take their implementation to the next step



Maximizing Your Use of CMS

Now that you've been using CMS for a while, why not learn more about some of its advanced features such as opportunity management, support, campaign management, Outlook integration and query features. (1 hour)

Understanding EmployeeNet

Learn the benefits of using EmployeeNet, hardware requirements, and strategies and best practices for a successful implementation in a Web environment. (1 hour)

Introduction to CMS Customization

Get your first look at the CMS development toolset. This session will provide you with an introduction to the basic concepts of CMS Form Painter and Agent Designer. (1 hour)



Development Troubleshooting Tips

Learn effective debugging techniques used by experienced CMS Form Painter developers. (2 hours)



Making the Best Use of Your Data

Generate meaningful queries and reports that do the work for you. Students will complete practical exercises aimed at building queries and integrating reports. (2 hours)



Integrating with CMS

Bring your systems together with ease! This presentation highlights various CMS implementations that have been integrated with other applications. (1 hour)

Making the Most of Your Opportunities

The presentation portion of this session focuses on viewing some real-life implementation examples, followed by hands-on exercises introducing standard opportunity components. (1 hour)

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CMS Marketing Features

Learn how to track your marketing efforts from start to finish by using the CMS Campaign and List Management features. (1 hour)

Maximize Your Potential

For experienced users looking to get more out of their implementation

Getting More From Merging

Learn how to personalize communications with your customers. This lab details the options you have for literature fulfillment. (2 hours)

Understanding ClientNet and PartnerNet

ClientNet and PartnerNet make the sharing of information with your customers and partners easy. In this session, you'll gain an understanding of the components and structure of these web-based applications. (1 hour)



Beyond Implementation

Learn how to determine when upgrading to a new release is right for your organization, and gain insight on web integration methods and automating new divisions. (2 hours)

Advanced Development Troubleshooting Tips

Find out how to debug commonly encountered issues in advanced screen development. (2 hours)



Telephony Integration Options

Discover how to integrate telephony with CMS. The focus will be on the standard CMS integration with TeleVantage. (1 hour)



Start Making Cents - Using CMS Analytics to Present Your Data

Make data more relevant to your users by using CMS graphs, funnels and other tools. (2 hours)

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Beyond the Basics		Expand Your Horizons		Maximize Your Potential	
Set Your Course					
Wednesday, October 1					
8:00-8:45	<i>Breakfast</i>				
8:45-9:45	Conference Introduction				
9:45-10:00	<i>Break</i>				
10:00-11:00	Features of CMS and eCMS	Maximizing Your Use of CMS		Getting More from Merging	
11:00-12:00	Work Smarter, Not Harder	Understanding EmployeeNet (T)			
12:00-1:00	<i>Lunch</i>				
1:00-1:30	<i>Customer Spotlight</i>				
1:30-2:30	CMS Administration Tips & Tricks	Intro to CMS Customization (T)		Understanding ClientNet/PartnerNet (T)	
2:30-3:00	<i>Break</i>				
3:00-5:00	Data Integration thru Imports & Dedup (T)	Development Troubleshooting Tips (T)		Beyond Implementation	
Thursday, October 2					
8:00-8:45	Welcome/Breakfast				
8:45-9:45	Oncontact Software - Sneak Preview Oncontact IV				
9:45-10:00	<i>Break</i>				
10:00-11:00	Securing Your Critical Data (T)	Making the Best Use of Your Data (T)		Advanced Development Tips (T)	
11:00-12:00	CMS Screen Design Techniques				
12:00-1:00	<i>Lunch</i>				
1:00-1:30	<i>Customer Spotlight</i>				
1:30-2:30	Support Module in Action	Integrating with CMS (T)		Telephony Options (T)	
2:30-3:00	<i>Break</i>				
3:00-4:00	Connecting with Your Remote Users (T)		Making the Most of Your Opportunities		Using CMS Analytics
4:00-5:00			CMS Marketing Features		
<i>Dinner Event</i>					
Friday, October 3					
8:00-9:00	<i>Welcome/Breakfast</i>				
9:00-11:00	Special Topics				
11:00-12:00	Conference Wrapup				

T-Technical
Schedule subject to change

Hotel Accommodations

Contact the Sheraton Chicago Hilton & Towers **before August 31** to reserve rooms at a reduced rate of **\$199.00** a night. Call the Sheraton at **800-325-3535**, ask for group reservations and mention the Oncontact Software User Conference. Visit www.sheratonchicago.com.

Conference Registration

Enrollment:

Before Aug 31: \$1,795 for the first person,
\$795 for each additional person

After Aug 31: \$2,095 for the first person,
\$1,095 for each additional person

Includes: Three days of training, materials, breakfasts, lunches & special event.

Fax registration form to: Holly Ortmeier 262.375.4422

Make all checks payable to: Oncontact Software

Mail payment to:

Oncontact Software, c/o Holly Ortmeier
W67 N222 Evergreen Blvd., Suite 212
Cedarburg, WI 53012

Cancellations are subject to the entire seminar fee, which you may apply toward the 2004 Oncontact Software User Conference. Substitutions may be made at any time. Any damages to the hotel caused by an attendee will be the responsibility of the attendee.

Attendee:

Name: _____

Title: _____

Company: _____

Phone: _____

Email: _____

Additional Attendees:

Name: _____

Title: _____

Email: _____

Name: _____

Title: _____

Email: _____

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