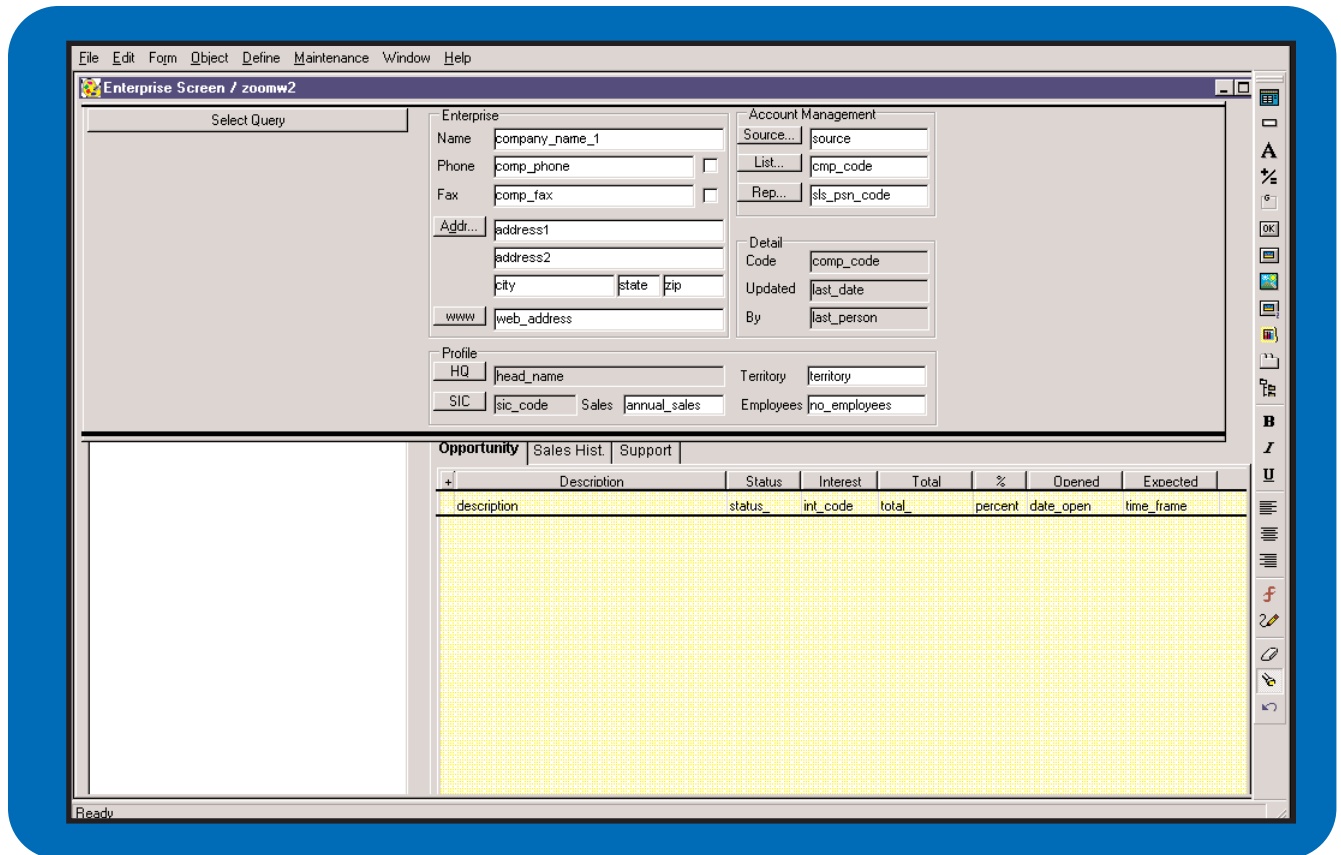


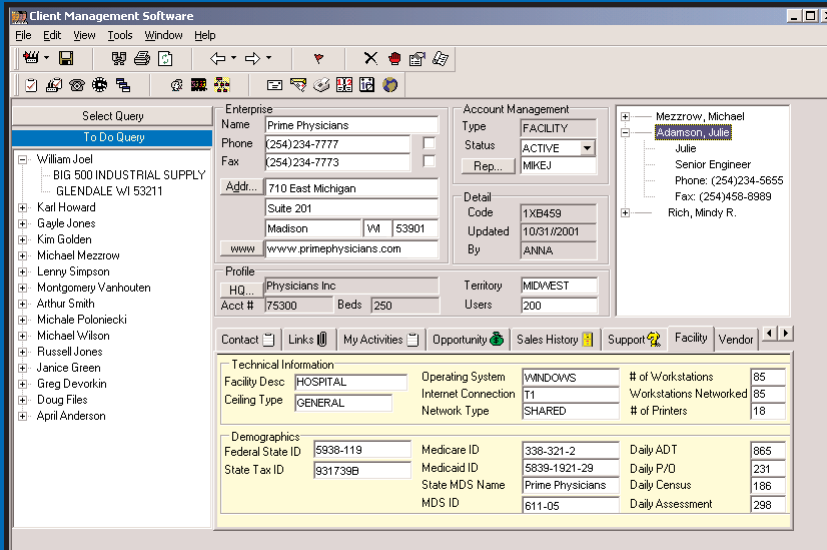
CMS FORM PAINTER IN ACTION

CMS Form Painter is the component of Oncontact Software's toolkit that lets you shape the look and feel of your CRM system and determine which information it captures. CMS Form Painter gives you the power and flexibility to completely redesign the appearance of your CRM system. You can customize any field or screen or add entirely new fields and screens to achieve an interface that matches your CRM strategy. The pages that follow contain several screenshots that showcase the customization capabilities of the CMS Form Painter.



CMS ENTERPRISE SCREEN

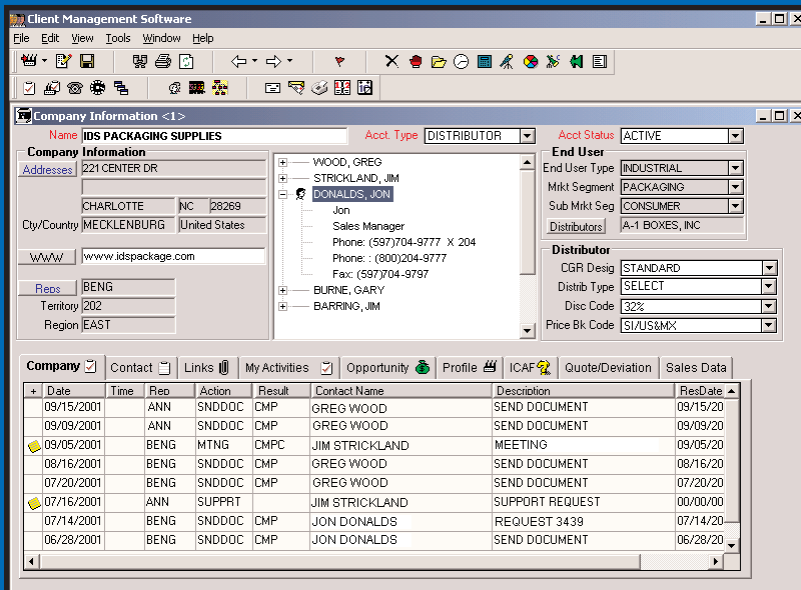
MEDICAL FACILITY



This medical organization created a Facility tab to capture detailed information specific to the medical facilities it interacts with.

The Facility tab tracks technical information, which allows the organization to identify the type of facility it's working with, in addition to key infrastructure data, such as operating system and network specifics. The tab also contains demographic details, which allows the organization to give each facility ID numbers that are used to generate daily reports.

MANUFACTURING



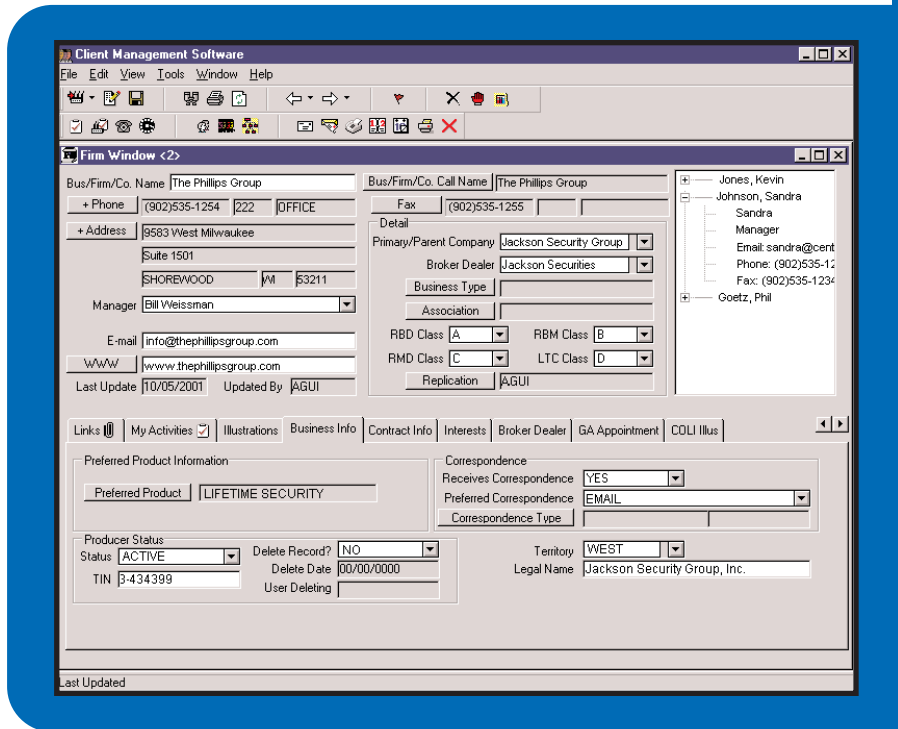
A manufacturer customized the enterprise screen to enable users to view a detailed profile of each account without leaving the main screen.

The screen offers a comprehensive account overview, including company and distributor details, as well as an end user description.

INSURANCE INDUSTRY

An insurance company created this screen to capture key information about the businesses that are its customers. The screen gives users one convenient location to view a complete overview of a customer.

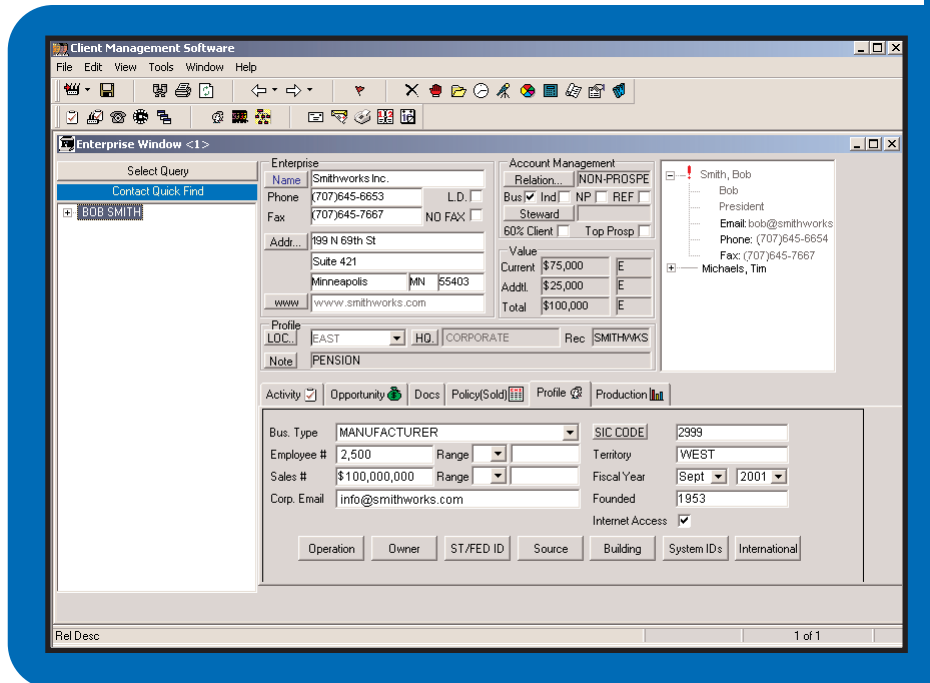
This comprehensive view stores all the unique data the insurance company needs to know about its customer, such as broker information and insurance classification. This screen also contains a tab that summarizes the customer's preferred product, including status and correspondence preferences.



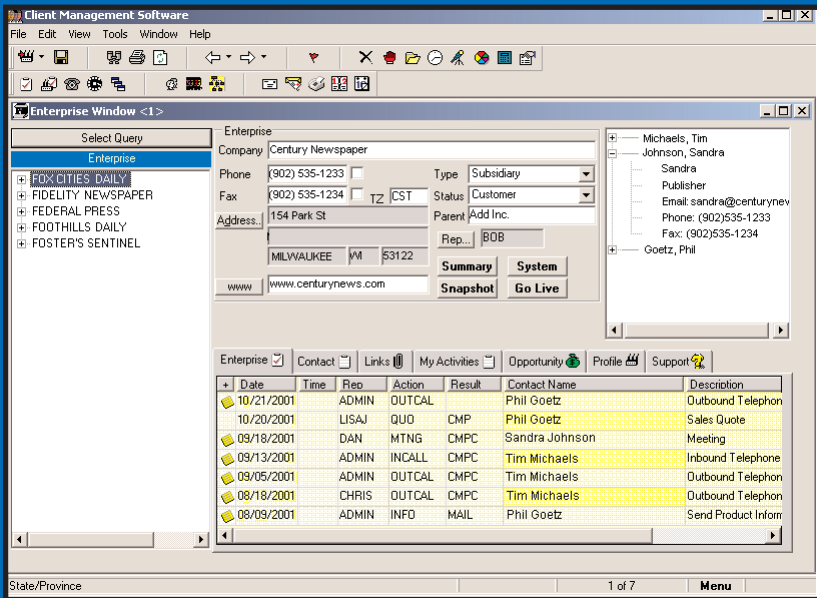
INSURANCE INDUSTRY

This insurance brokerage firm created a dashboard that houses all the information an employee needs to know about an account. The screen contains critical business details, such as account value, relationship to the company and open activities.

The firm also added buttons to the tab area of the screen, which allow users to instantly access other areas of the CRM application.



TECHNOLOGY COMPANY



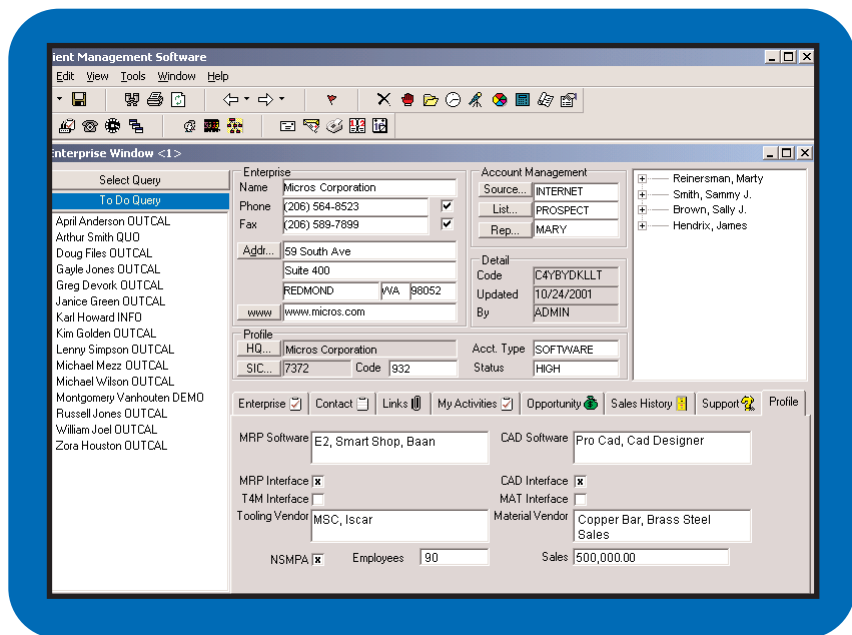
This organization produces software for the newspaper publishing industry. The company wanted a simple main screen that would act as a launching pad to other important information.

The screen needed to store critical data but had to be organized in a logical way that would be easy for users to view. The company accomplished this goal by adding buttons that launch screens containing more detailed data about specific aspects of the account. Users can now view a substantial amount of information with a simple mouse click.

TECHNOLOGY COMPANY

This detailed profile tab, added to the software manufacturer's enterprise screen, tracks specific information for those customers that sell its products to other companies.

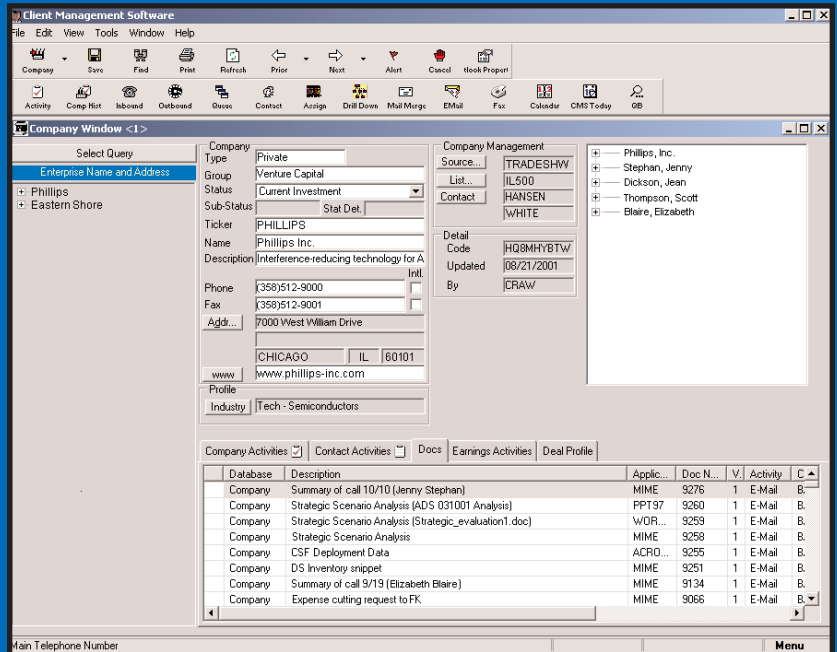
The tab also gives users industry-specific details regarding MRP and CAD software, as well as tooling and material vendors.



FINANCIAL ORGANIZATION

An investment banking firm modified the enterprise screen to provide a more global view based on the type of the account. The columns added to the screen provide them with valuable information such as which internal group the account is assigned to, the current status/sub-status of the account, the ticker or unique id used to identify the account, the industry the account belongs to, as well as, a broad description of the account.

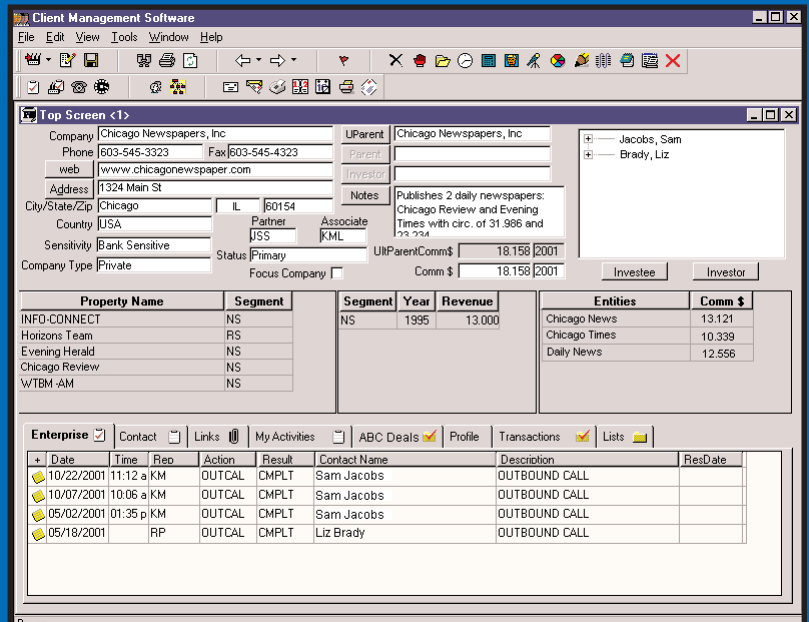
Column labels change and become active or inactive based on the type of account. They also use the source and list columns extensively to further define the account. The tabs that are displayed on the lower portion of the screen were created to be visible or invisible based on user group, which is determined upon login.



FINANCIAL ORGANIZATION

This investment banking firm needed to capture a lot of valuable information on one screen.

The screen was divided into segments so that information pertaining to the property details, segments and entities are all immediately accessible. This makes it quick and simple for users to locate account details.



TOURISM

The screenshot displays the 'Client Management Software' interface. The main window is titled 'TOURISM' and shows the following details for 'Travel Perks Unlimited, Inc.':

- Company Information:**
 - Long Name: Travel Perks Unlimited, Inc.
 - Company Name: Travel Perks Unlimited
 - www: www.travelperks.com
 - List Code: TOURISM
 - Managed By: Meeting Network
 - Address: 53049 Forest Lane, Suite 430, San Diego, CA 94546, USA
 - Phone: (909)432-1284
 - Fax: (909)432-1375
 - Account Management: Sales Executive: TA, Regional Exec: JM, Campaigns: TDC2
 - Detail: Code: 06H26G8MGT, Updated: 10/12/2001, By: ADMIN
- Enterprise:** Contact, My Activities, CampaignRSVP, TAVMisc Profile, Meeting History
- Table:**

Campaign Name	Response	Campaign Size	Total Responses	Enterprise Response
DC CAMPAIGN 2001	Y	780000	1	
2001 AZ DIAMONDBACKS	Y	85000	8	
ADVING WEST OPEN 2001	N	500000	0	

At the bottom of the window, it shows 'Ent Responses', '1 of 6', and an 'Update' button.

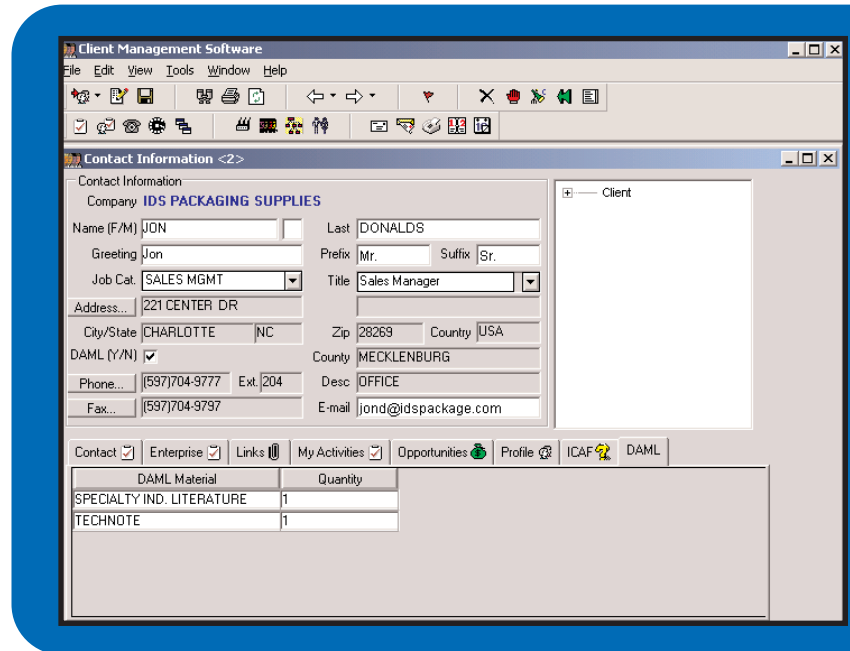
This company provides a free service to meeting planners. The company maintains a mailing list of hotels that have meeting space and issues daily sales leads to the properties.

This screen makes it possible for a meeting planner to solicit hotel properties with multiple opportunities in a single phone call. The screen records preliminary data about each sales opportunity, including number of people planning to attend, amount of rooms needed and meeting dates.

CMS CONTACT SCREENS

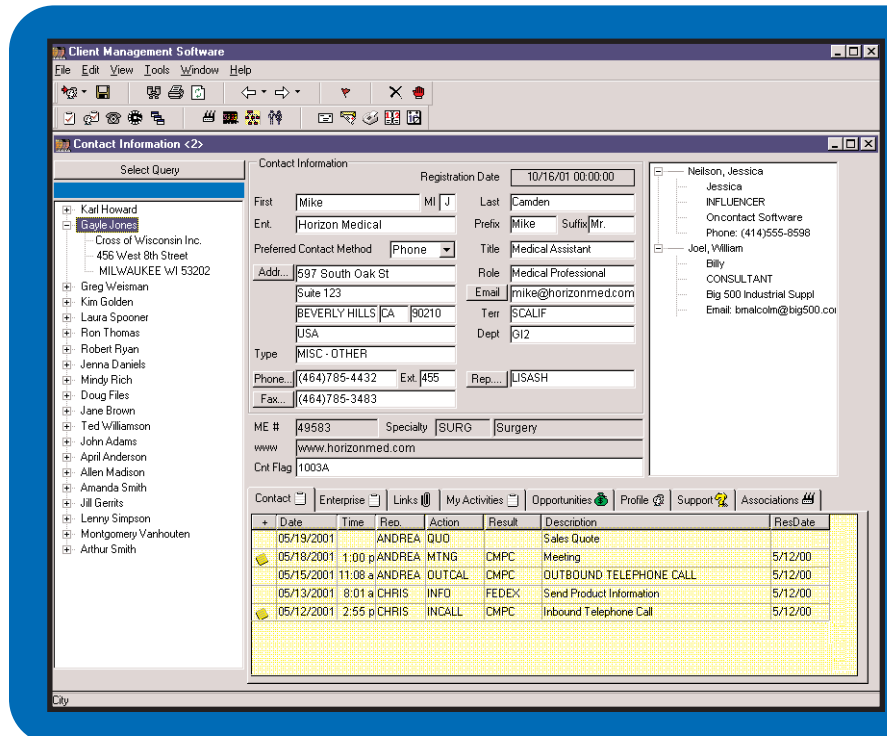
MANUFACTURER

This manufacturing company added a DAML tab to the contact screen. This tab tracks which marketing literature, including quantity, has been mailed to a specific contact. The marketing department can generate queries and reports to determine which contacts receive each piece of literature. As a result, the marketing department can quickly target lists for mailing newsletters and updated literature.

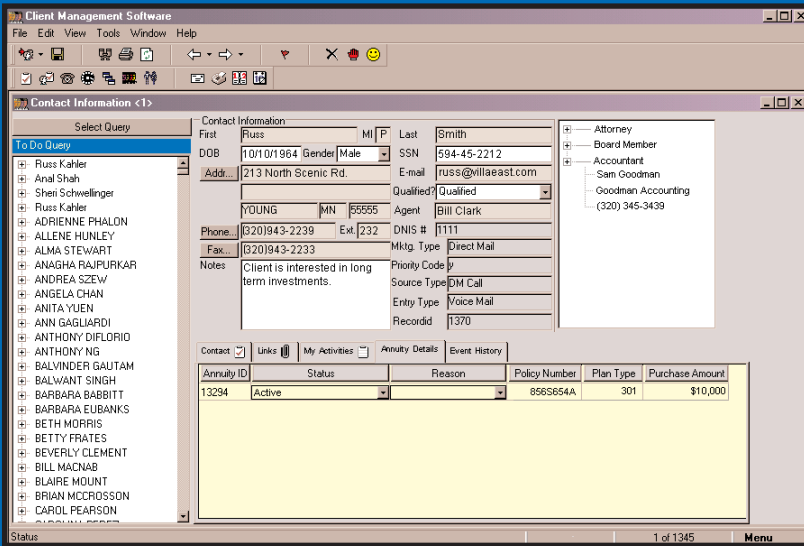


TECHNOLOGY COMPANY

This company provides Web hosting for the medical industry. This screen was designed to capture detailed contact information, including the individual's internal role, specialty area and group membership. Users can quickly obtain a comprehensive contact profile from one screen.



INSURANCE INDUSTRY



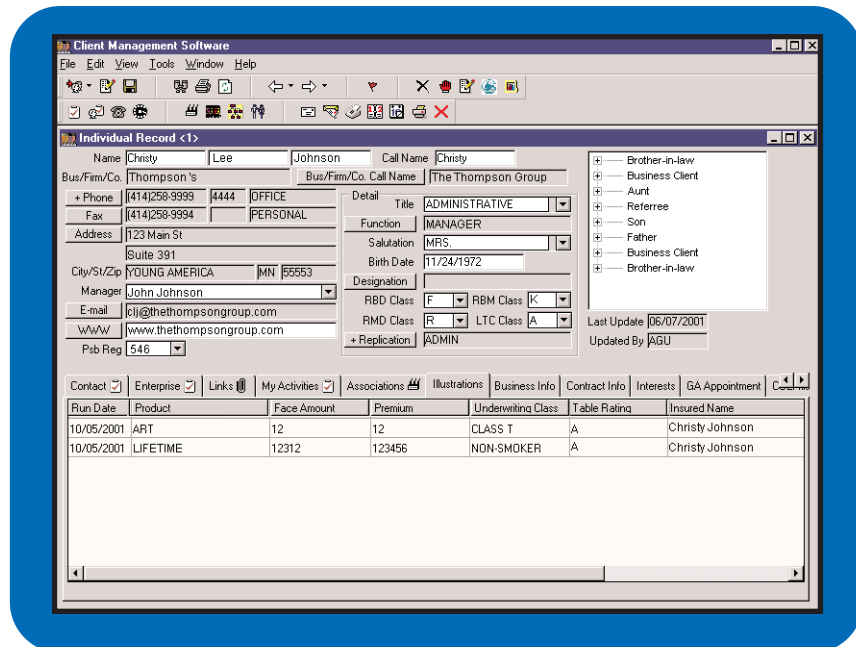
This life insurance and financial services provider customized the contact-centric screen to fit its industry-specific needs. The company added several fields, including DNIS number, marketing type, priority code, source type and entry type. The screen allows users to see a detailed contact profile in one glance.

The contact tree, located in the window on the right side of the screen, is used to track individuals associated with the contact, such as primary and contingent beneficiaries.

The company added an Annuity Details tab at the bottom of the screen to allow users to obtain quick access to the annuity area of the application.

INSURANCE INDUSTRY

An insurance company created this screen to store information about its relationships with insurance brokers. The screen stores account segments, qualification requirements and permissions in one easy-to-read main screen.

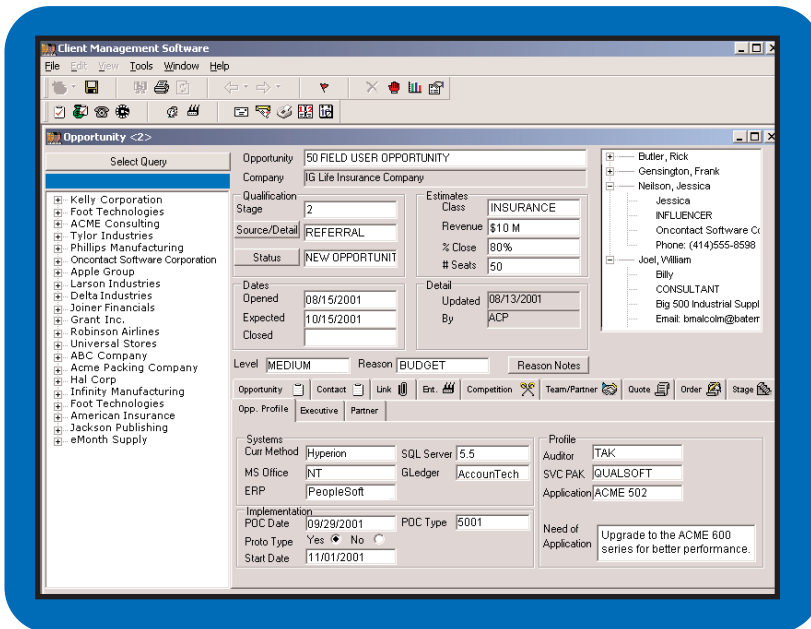
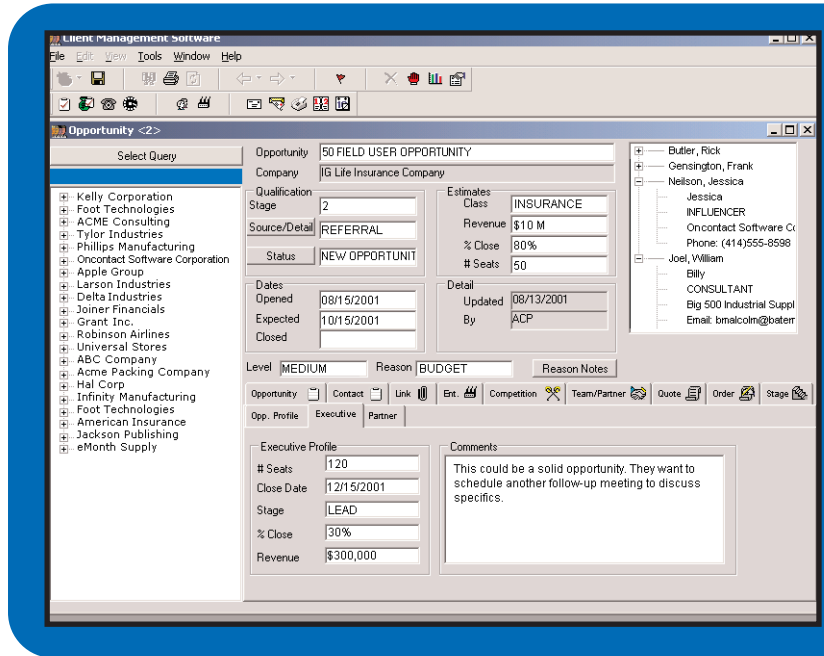


CMS OPPORTUNITY SCREEN

TECHNOLOGY COMPANY

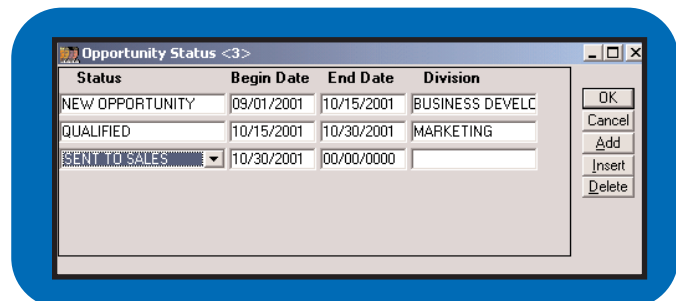
This medical software manufacturer chose to filter tabs based on user login. For example, executive management will see only the Executive tab while partners will see only the Partner tab.

This tab shows details such as number of licensed seats, close date, percent to close, revenue and comments about the opportunity. These fields give sales management access to vital information regarding the opportunity and simplify analysis of the account's future sales potential.

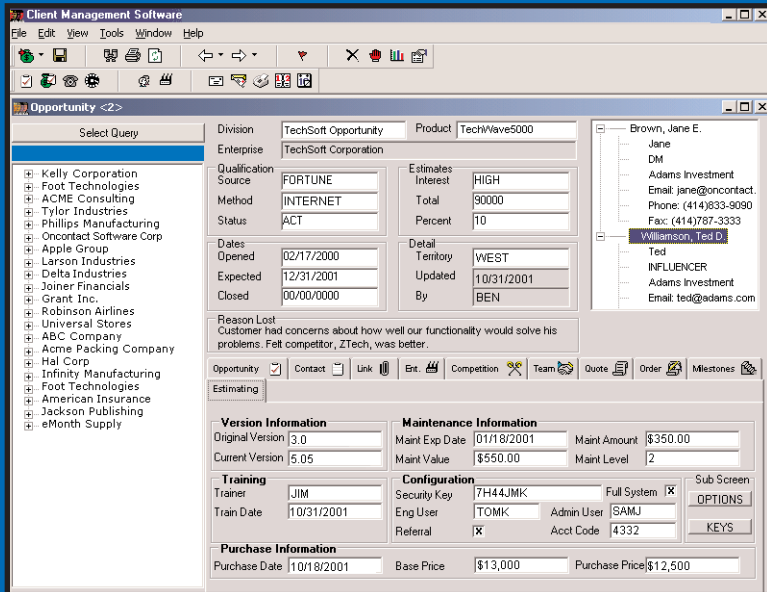


This opportunity profile tab displays detailed tracking of specific criteria for this opportunity. The tab shows which software the sales prospect currently uses, implementation specifics and reason for using the software. This screen is designed to help the sales team determine the direction and focus of the opportunity.

The Opportunity Status screen shows the progression of an opportunity without using the entire milestone feature. Status, beginning/ending dates and division are all located in one easy-to-use screen.



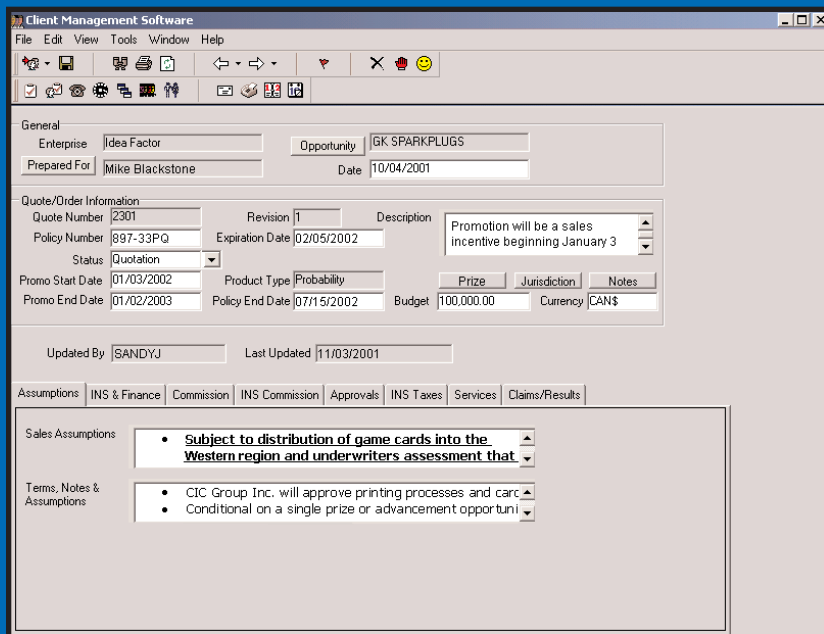
SOFTWARE MANUFACTURER



This software manufacturer needed to track specific information for estimating and maintaining software packages for engineering companies.

The Estimating tab was created to quickly display all necessary details. Version number, as well as maintenance, training, configuration and purchasing information are all accessible from one screen.

SWEEPSTAKES ORGANIZATION



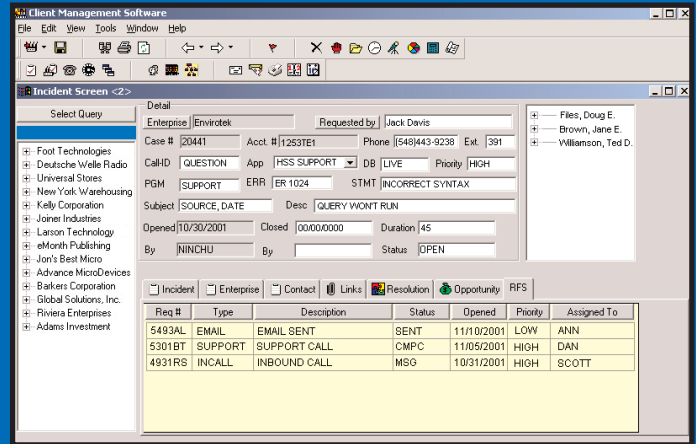
This detailed quote screen stores information that was collected when a user created the opportunity with a wizard. Responses from the pricing department can also be captured. Additional tabs store commission, costs and approval information.

The RTF feature gives the user Rich Text Formatting capabilities in specific fields and in final merge documents. This feature frees time for sales professionals by eliminating the need to format documents.

CUSTOMER SERVICE SCREENS

Customization of the Incident screen allows the user support center to streamline data entry on cases. Detailed information was added to the main portion of the screen, including type of call, status of system and description of issue. Users are now able to quickly gather information and pass it on to the next level without toggling to multiple screens.

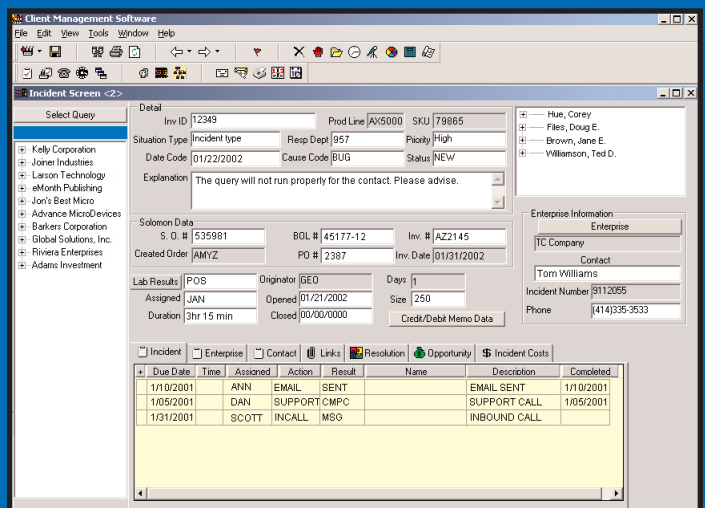
TECHNOLOGY COMPANY



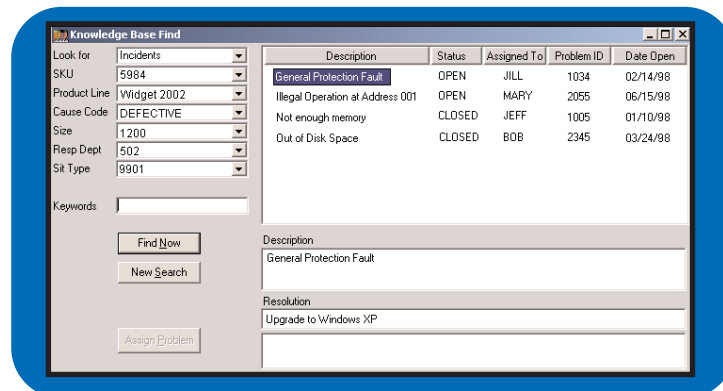
This manufacturing company designed the incident screen to integrate with their ERP package.

The Invt Id (Inventory ID) zoom field allows users to pick a product from their ERP list of products. The middle section allows them to tie this incident to a specific PO, SO, etc. These fields are also directly integrated with their ERP, allowing them to know exactly what order this is tied to and who generated the order. PAR type allows their engineers to track the attributes of returned products and determine if a refund or exchange should be given.

MANUFACTURING COMPANY



KNOWLEDGE BASE



The knowledge base screen was enhanced to match the incident screen more closely.

CMS SUB SCREEN

SWEEPSTAKES ORGANIZATION

Client Management Software
File Edit View Tools Window Help

Order Entry <3>

General
 Enterprise: TFI Group Inc. Opportunity: TFI GROUP OPPORTUNITY
 Prepared For: Dave Sanders Date: 10/10/2001

Quote/Order Information:
 Quote Number: 2451 Revision: 1 Description: Do you have any techniques for passing database schema
 Policy Number: 12AS1CG01 Expiration Date: 12/31/2002
 Status: Quotation
 Promo Start Date: 04/30/2001 Product Type: Over - Redemption
 Promo End Date: 03/31/2002 Policy End Date: 00/00/0000 Budget: 1,250.00 Currency: US\$

Updated By: Jenny Johnson Last Updated: 10/15/2001

Assumptions: INS & Finance Commission: INS Commission Approvals: INS Taxes Services: Claims/Results

Client Self Retained: Amount: 1,450.00
 Can CMS integrate with Exchange: I have several SQLs that will not respond
 IC Self Retained: Amount: 100.00
 I think the way we had it designed was that: Actual: 150.00

Sum Insured: Amount: 1,450.00
 Gross Premium: Premium: 125.00
 Gross Client Costs: Total Costs: 130.00
 Services: Line Written: Term Life: 100
 Invoice Date: 10/01/2001 Ref Number: 0NCCMS

This organization creates, promotes and insures sweepstakes games. This customized screen tracks important insurance information for a sweepstakes promotion.

The company created the INS & Finance tab to display-in one convenient place-all necessary policy details, including insured amount, premium and client costs.

This custom screen captures prize structures and probability of a sweepstakes. This comprehensive screen includes prize description, odds and prize redemption in a simple, easy-to-read format.

PROBABILITY

Prize Description	Value	# Seeded	Odds	Est. Redemption	Redemption Notes	Client Self Insured
Cash - level 5	30,000.00	5	500	30,000.00	Need letters A B C D	.00
Cash - level 3	10,000.00	10	500	30,000.00	Need letters A B	.00
Cash - level 3	5,000.00	20	500	50,000.00	Need letters A	.00
Cash - level 3	1,000.00	100	500	50,000.00	Need letters C	.00
Cash - level 3	100.00	1000	500	50,000.00	Need letters D	.00
Cash - level 3	75.00	2500	500	82,500.00	Instant win	.00

FINANCIAL ORGANIZATION

Client Management Software
File Edit View Tools Window Help

Deal Profile <2>

Round: Deal Round
 Deal ID: SR4VQN41 Group: Venture Capital
 Company: The Michaels Group
 Primary Contact: Bill Watson

Key Dates:
 Date Received: 08/08/2001
 Passed On Date: 08/21/2001
 Invest Date: 00/00/0000

Deal Details:
 Lead: JIHAN Status: Passed On
 Second: ABEC Pre-Money Val.: 345,345.
 Priority: F Round Size: 45,345.
 Source: Cold Call Post-Money Val.: 390,690.
 Source Detail: Michelle Smith

Investment Information:
 # Shares: 0
 Share Price: 0
 MSD Amt. Invested: 345.0
 Exit Strategy: Acquisition
 Estimated Exit Date: 11/04/2001

Additional Information:
 This FY Estimate: 11/24/2001 Est. Breakeven: 12/25/2001 Last FY Revenue: 2,354.00
 LTM Revenue: 25,423.0 This FY Revenue: 253,797.0 Next FY Revenue: 2,354,235.0

Checklist:
 Created Email Folder
 Created Hanging Folder
 Printed Web Site
 Printed Venture Source
 News Search
 Printed Business Plan, etc
 Printed Industry Materials
 Created 1st Cut Writeup
 Created Company Folder
 Formed Initial Question List

An investment firm created the Deal Profile screen to help its employees build investment portfolios. The screen enables members of groups to track information regarding investments they are managing. Because each group tracks information differently, the Deal Profile screen displays unique settings based on which group member is accessing the information.

TOURISM

This company provides a profiling service to meeting planners. This screen records data about a meeting, meeting attendees and the facility used for the meeting. This data is conveniently stored as a meeting history within CMS for quick retrieval as necessary.

The screenshot shows the 'Post Convention Report' form in the DNIcontact Client Management Software. The form is organized into several sections:

- Company Information:** CVB # 957, Company Name SMITH CORPORATION, Meeting Name ANNUAL CONFERENCE, Address 557 N. Main, City/State/Zip Sacramento CA 95814, Phone (916)272-2272, Fax (916)272-4182, Contact Name Lana Johnson, Meeting Planner, Mtg Rgn. INTL N. A. U. S. RGNL States Las Vegas.
- Meeting History:** City Las Vegas, Mtg Start Date 12/17/1999, Mtg End Date 12/20/1999, Mtg Start Day Monday.
- Delegates:** Registered Attendance 300, Total Attendance 300, Peak Rooms Blocked 300, Peak Rooms Used 300, Peak Suites Used, Name of HQ Hotel MGM, Peak Rooms in HQ Hotel 300, Housing (A,B,C,M,O) ASSOC.
- Facilities:** Largest Mtg. (Attendance) 1,300, Simultaneous Mtg. Rooms 4, Number of F and B Functions 4, Largest Meal (Attendance) 300, Net SQ FT. (000) Exhibits 10,000, Gross SQ FT. (000) Exhibits 10,000, Move-in (# of Days) 1, Exhibit Start Day Sun, Exhibit End Day Fri, Move-out (# of Days) 5, Exhibit Facility (N.H.C.O) Convention Cel.

A 'Post Convention Grid' button is located at the bottom of the form.

FINANCIAL ORGANIZATION

This company provides life insurance and financial services products, including term and universal life insurance, fixed and variable annuities and other solutions designed to help customers manage risk, accumulate assets and safeguard their futures.

The Annuity screen was developed to track fixed and variable annuities. Information captured on this screen is used to populate an annuity application report, a tool that is essential to the company's daily business operations.

The screenshot shows the 'Annuity Screen' form in the Client Management Software. The form is organized into several sections:

- Owner Information:** Owner Michael T. Williams, Address 659 North Hills Rd, City/St/Zip Tampa Bay FL 97689, Phone (242)843-1298, DOB 05/15/1956, Gender M, SSN 954-34-3921.
- Joint Owner:** Joint Owner Melissa L. Williams, DOB 05/10/1956, Gender F, SSN 932-33-9651.
- Annuitant Information:** Annuitant Sara P. Williams, Address 65 Bay Hills Rd, City/St/Zip Tampa Bay FL 97689, Phone (242)843-1983, DOB 10/05/1980, Gender F, SSN 954-34-3121.
- Joint Annuitant:** Joint Annuitant Melissa L. Williams, DOB 05/10/1956, Gender F, SSN 932-33-9651.
- Beneficiary Information:** Primary Beneficiary Thomas F. Williams, Personal Relationship son, % 50; Contingent Beneficiary Jenifer M. Williams, Personal Relationship daughter, % 50.
- Purchase Amount Allocation:** 1 Year Rate Guarantee (%) 10%, 3 Year Rate Guarantee (%) 15%, 5 Year Rate Guarantee (%) 20%, Purchase Amount (\$) \$5000.00.
- General Information:** Type of Plan LIFE, Tax Year 2001, Policy Number 43-445439-129. Questions about existing annuity contracts and life insurance policies are answered 'No'.

The form includes a 'Ready' status indicator at the bottom left.

INSURANCE INDUSTRY

Client Management Software
File Edit View Tools Window Help

Policy Screen <2>

Policy #

Policy Term
 Effective Date Expiration Date
 Cancel Date

Billing Acct. # Last Update
 Billing Type Update Person
 Billing Plan

Contacts

ID	First Name	Last Name	Priority
6	Mike	Conner	Normal
9	Jim	Wilde	Normal
4	Tammy	Benning	Normal

Last Updated By

This screen was created by a group of companies that provide property, liability and re-insurance products and services in strategically selected markets throughout the world.

The Policy screen helps users manage policies for existing customers. From a tab on the company screen, a user can add a new policy, view existing policies or delete a policy. The screen provides users with a snapshot of policy information and helps them track effective and expiration dates of existing policies to drive marketing and sales efforts.

INSURANCE INDUSTRY

Client Management Software
File Edit View Tools Window Help

Illustration Detail <3>

Primary Insured
 First Name
 Last Name
 Sex State
 Date of Birth Age

Other Insured
 First Name
 Last Name
 Sex State
 Date of Birth Age

Variation
 Run by Run Date Split \$ 162 TC # of Variation 1 of 2

Primary Insured Underwriting Class Table Rating Temp Extra
 Other Insured Underwriting Class Table Rating Temp Extra

Face Amount 1035 Blend Yrs. Prem Paid
 Premium How Sent Portfolio Allocation Definition of Ins
 Mode Revised Illustration Interest Rate Death Benefit Type
 Drop In Product Net Interest

Notes

Date Run	Product	Face Amount	Premium	Underwriting Class	Table Rating	Reference File
10/05/2001	ART	12	12	CLASS T	A	
10/05/2001		12312	123456	NON-SMOKER		

Notes

An insurance company created this screen to track illustrations for individuals buying life insurance.

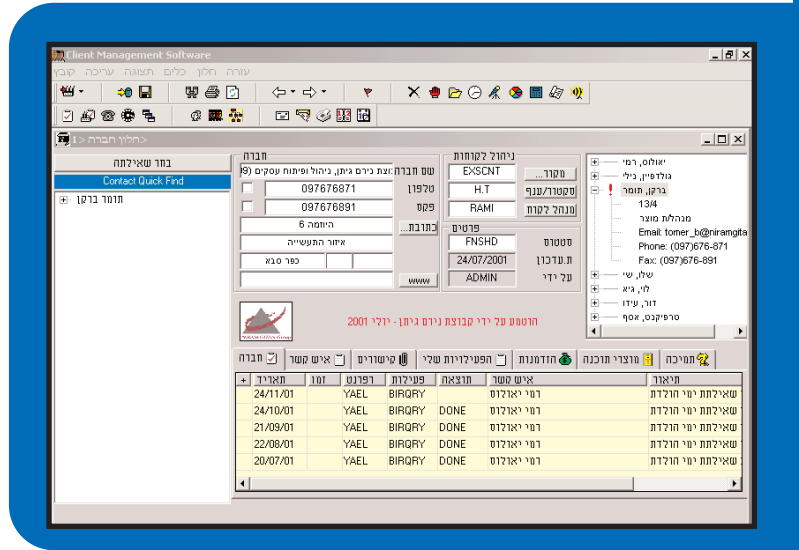
The screen contains all pertinent profile information for the primary insured, as well as other insured individuals.

This screen can store multiple variations per illustration, which are all accessible with a simple mouse click.

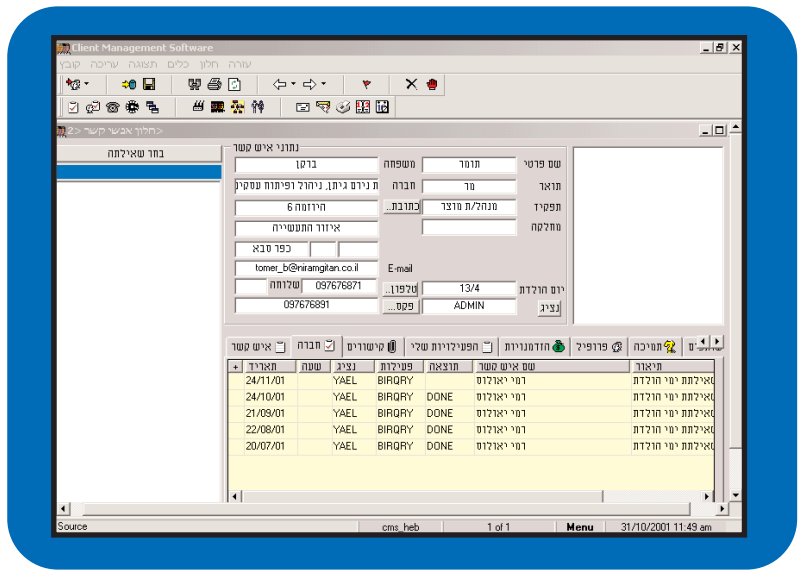
LANGUAGE TRANSLATION

This company is a multi-disciplinary consulting firm that provides CRM products in Israel and some parts of the Middle East. The company uses the enterprise and contact screens to track clients and, at the same time, provide a fully customized version of CMS to its clients based on individual need.

The enterprise and contact screens have been translated into Hebrew and the text justification and columns have been changed to read from right to left.



The contact screen contains information, translated into Hebrew, about an individual.



This screen shows how an incoming marketing call is processed and translated into Hebrew.

