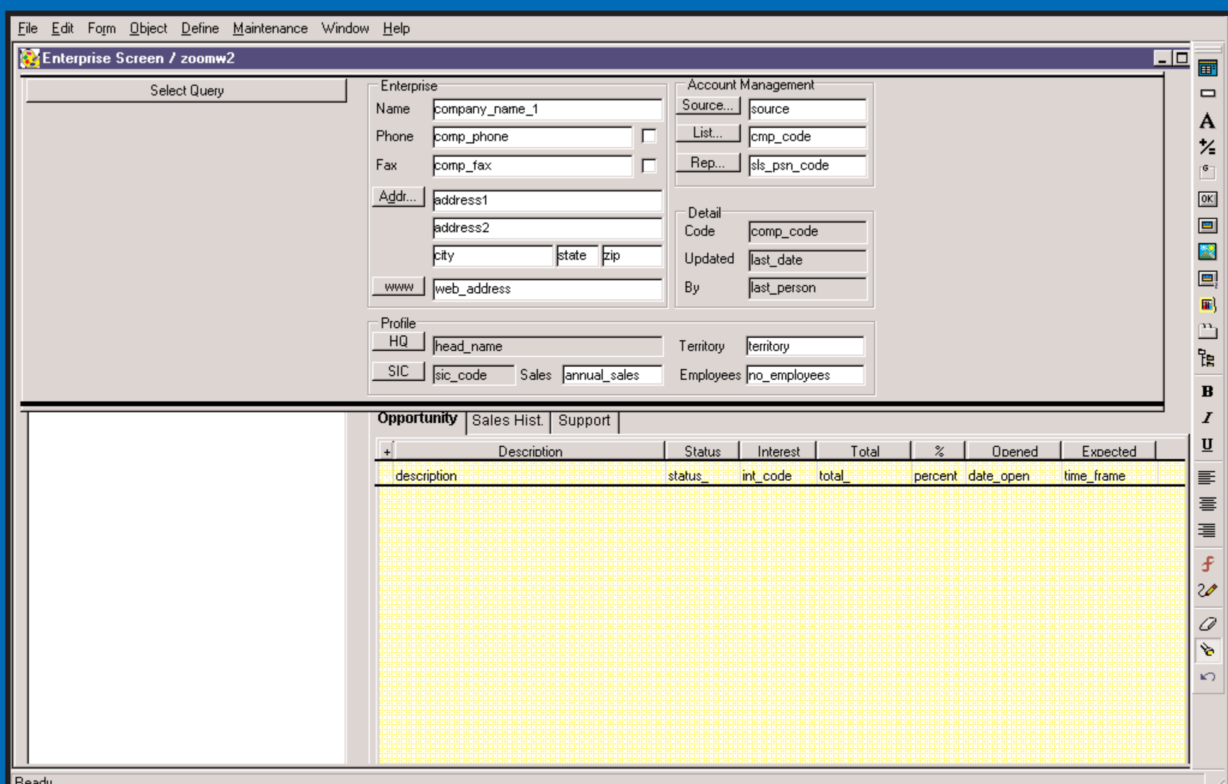
CMS FORM PAINTER IN ACTION

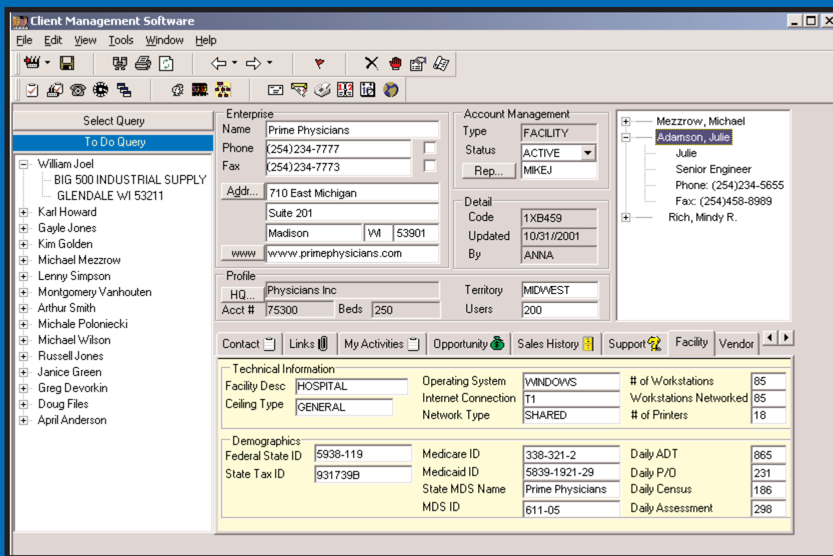
CMS Form Painter is the component of Oncontact Software's toolkit that lets you shape the look and feel of your CRM system and determine which information it captures. CMS Form Painter gives you the power and flexibility to completely redesign the appearance of your CRM system. You can customize any 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.



The mid-market never had it so easy.

CMS ENTERPRISE SCREEN

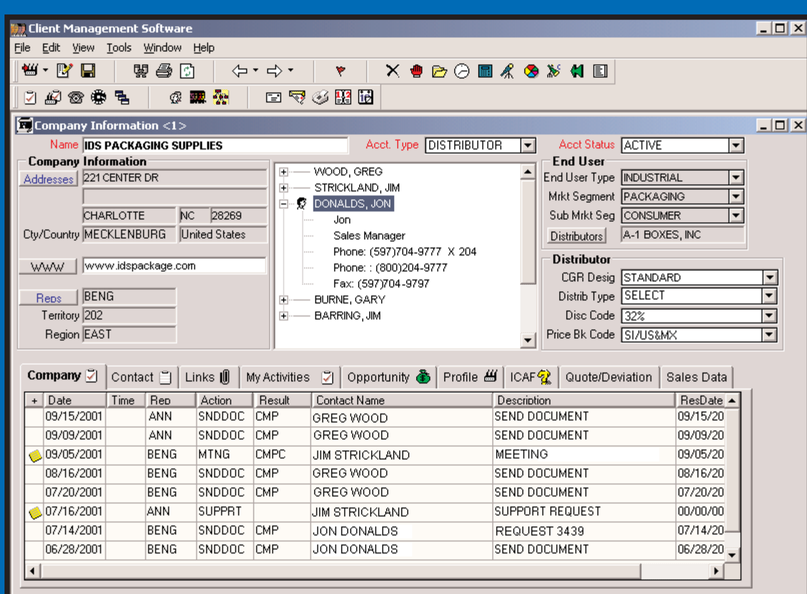
MEDICAL FACILITY



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



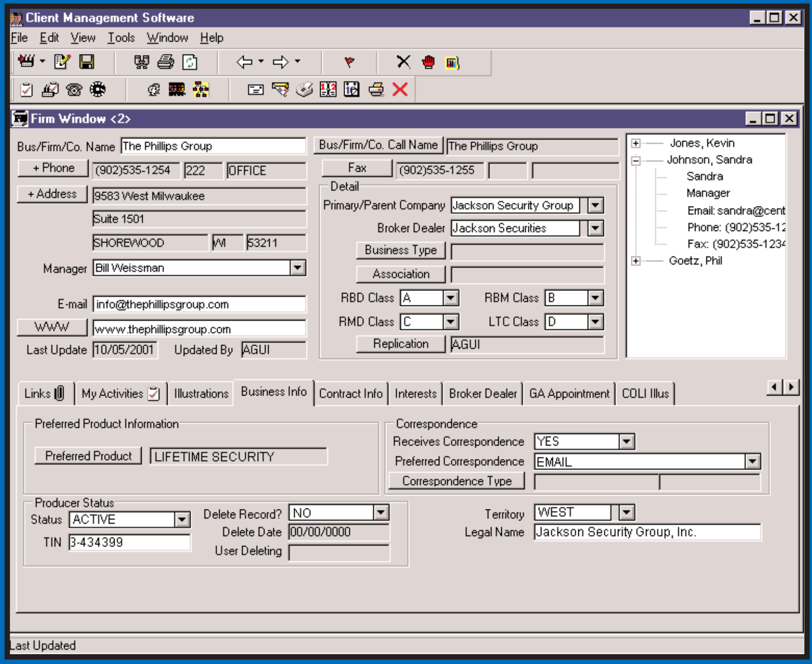
A manufacturer customized the enterprise screen to enable users to view a detailed profile of each account without leaving the main screen.

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.

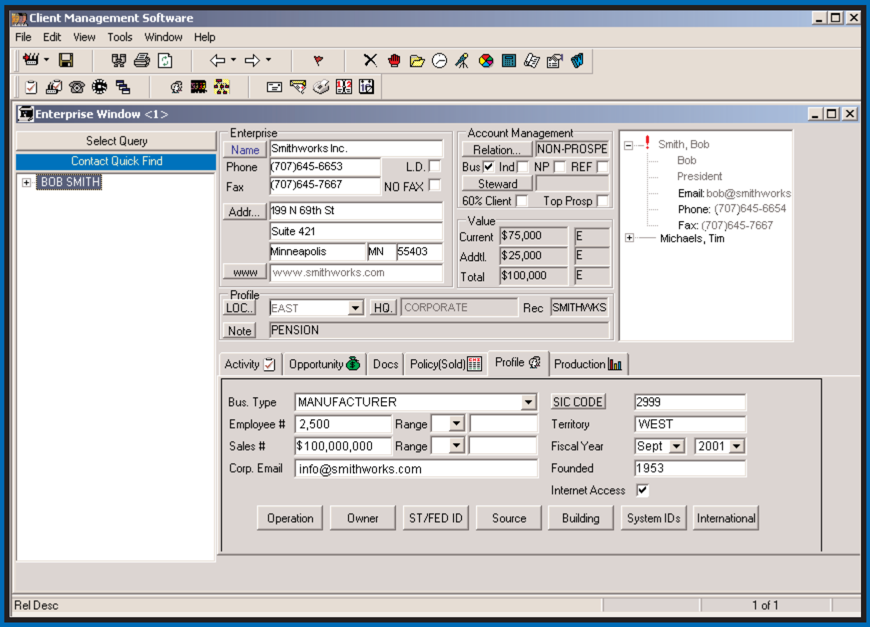
This comprehensive view stores all the unique data the insurance company needs to know about its customer, such as broker information and insurance classification. This screen also contains a tab that summarizes the customer's preferred product, including status and correspondence preferences.



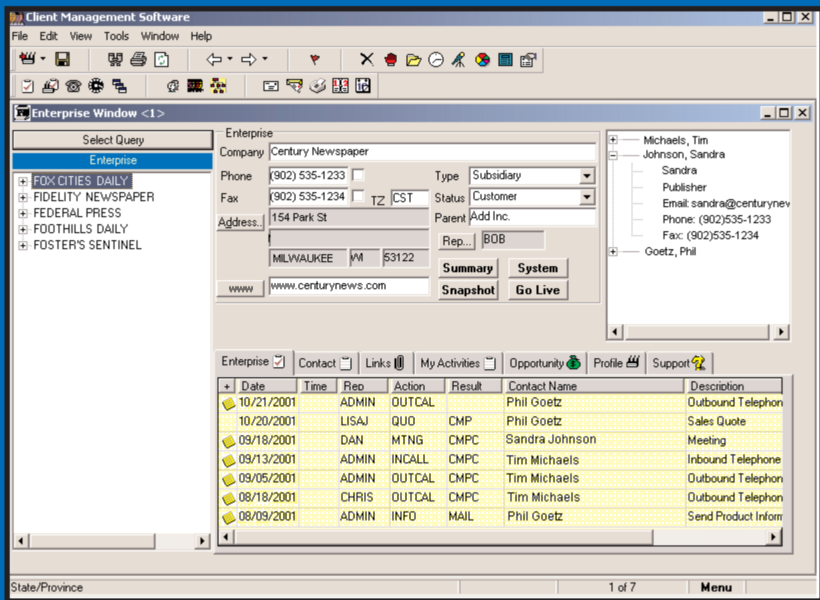
INSURANCE INDUSTRY

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



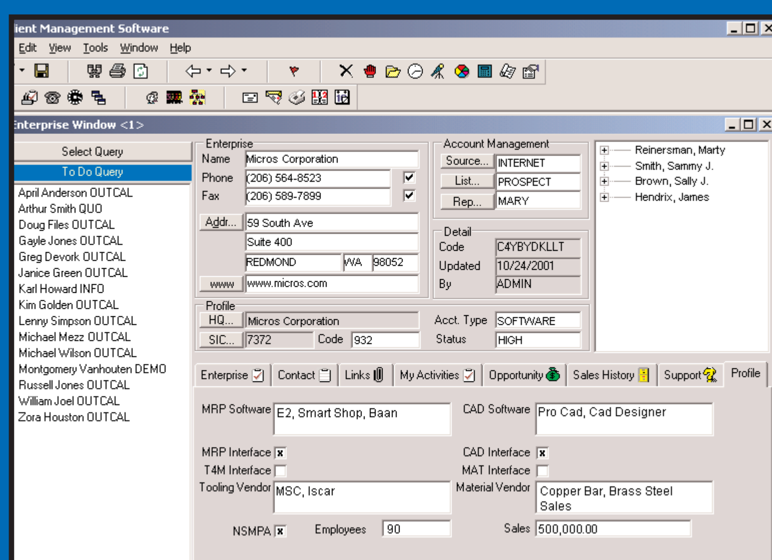
This organization produces software for the newspaper publishing industry. The company wanted a simple main screen that would act as a launching pad to other important information.

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.

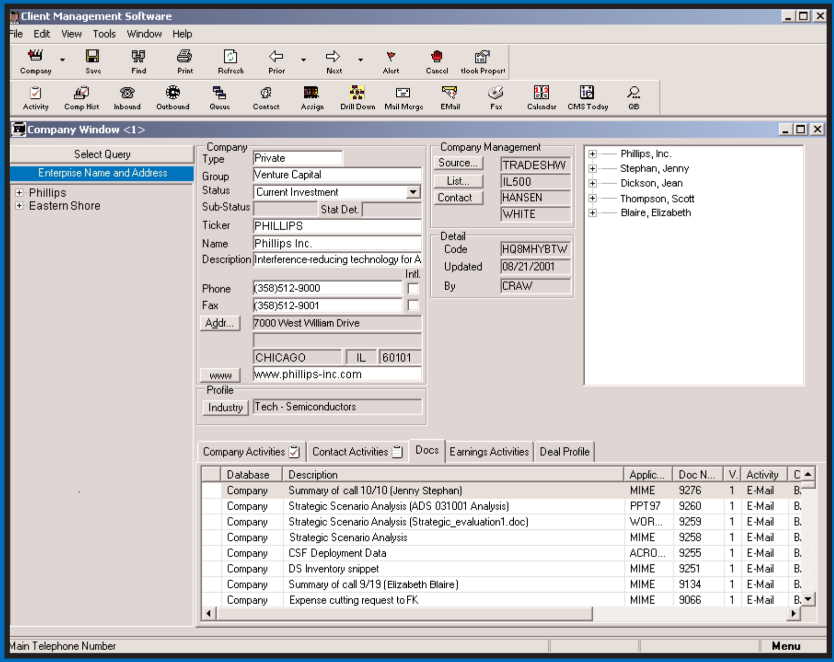
TECHNOLOGY COMPANY

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.



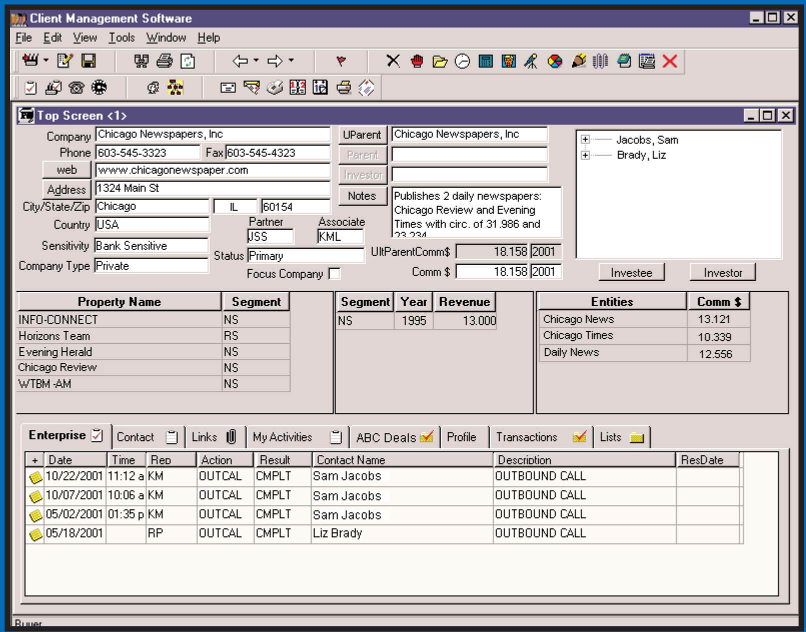
FINANCIAL ORGANIZATION



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.

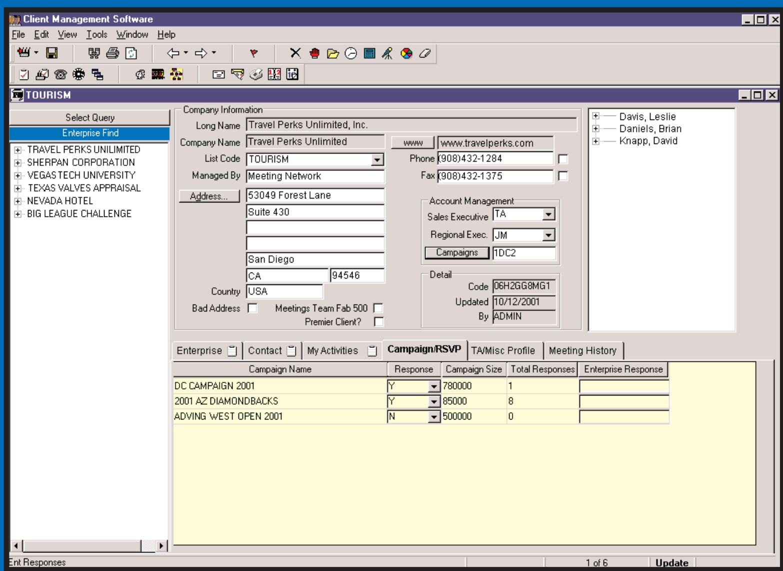
FINANCIAL ORGANIZATION



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



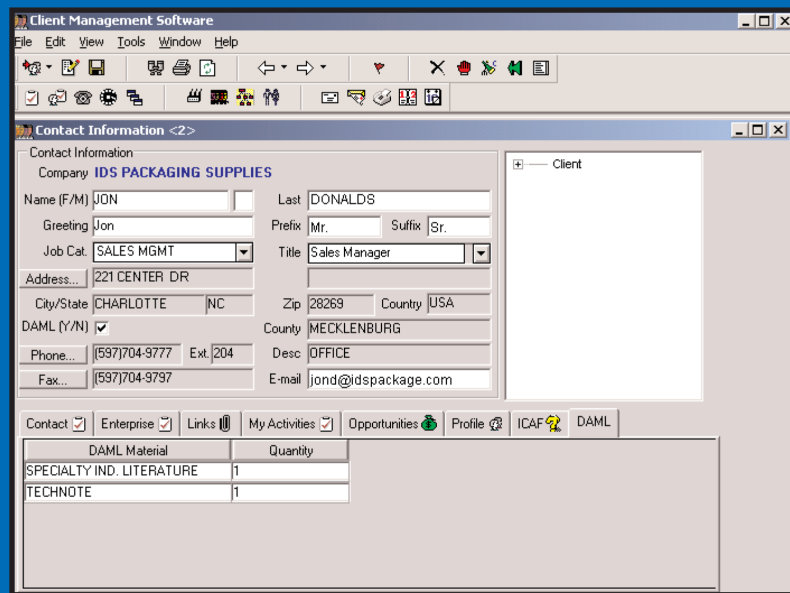
This company provides a free service to meeting planners. The company maintains a mailing list of hotels that have meeting space and issues daily sales leads to the properties.

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

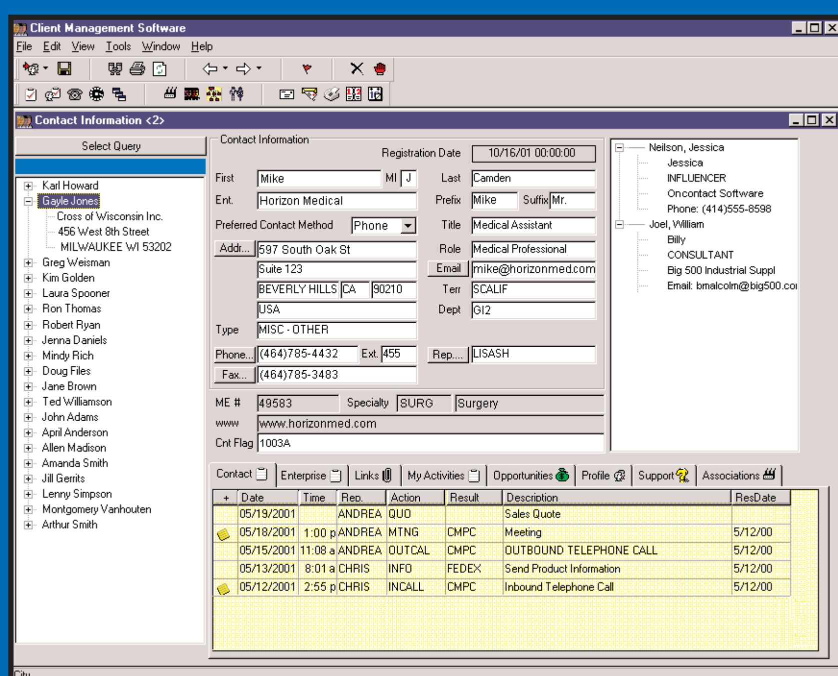
MANUFACTURER

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.

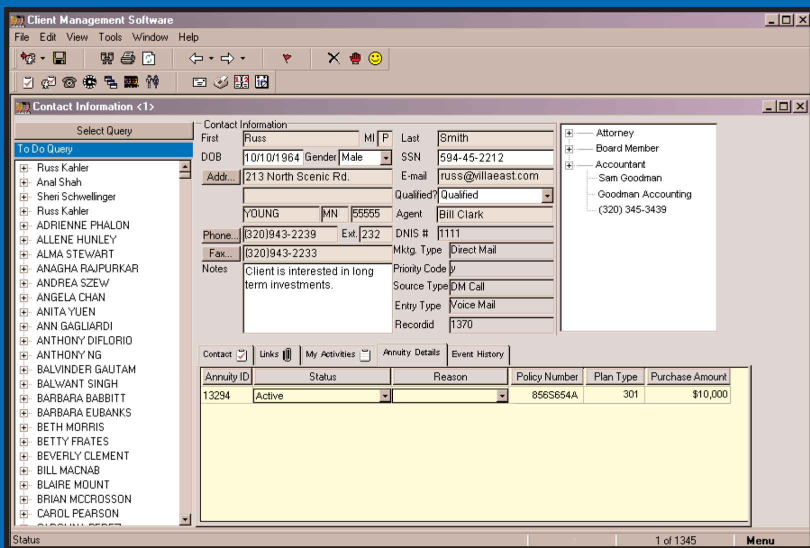


TECHNOLOGY COMPANY

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



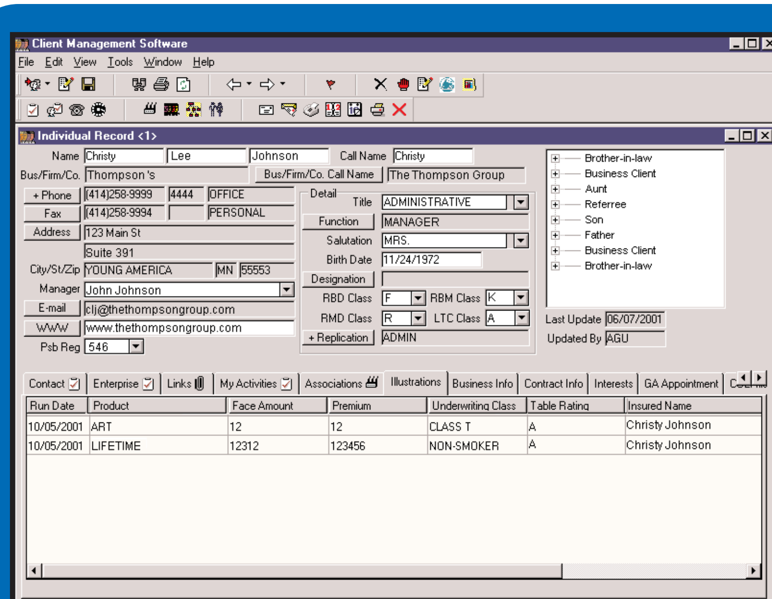
This life insurance and financial services provider customized the contact-centric screen to fit its industry-specific needs. The company added several fields, including DNIS number, marketing type, priority code, source type and entry type. The screen allows users to see a detailed contact profile in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

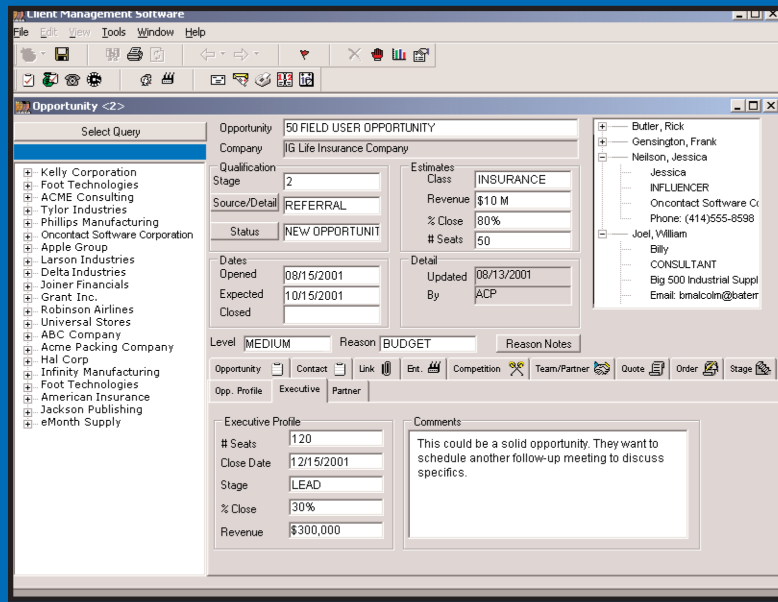


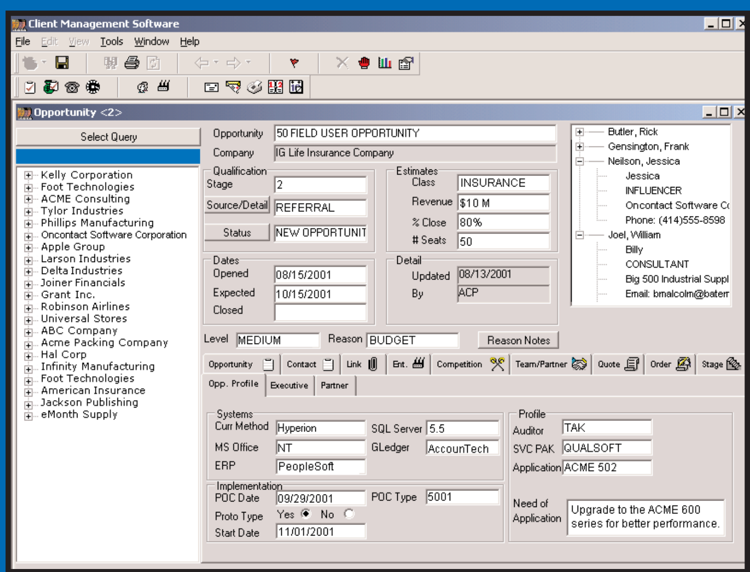
CMS OPPORTUNITY SCREEN

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.

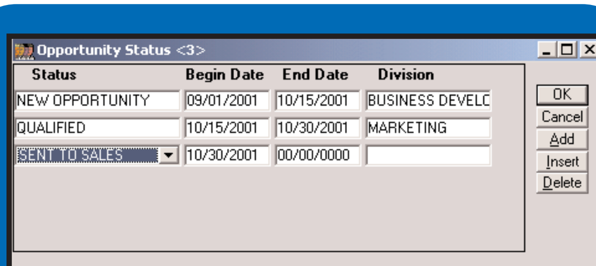
This tab shows details such as number of licensed seats, close date, percent to close, revenue and comments about the opportunity. These fields give sales management access to vital information regarding the opportunity and simplify analysis of the account's future sales potential.



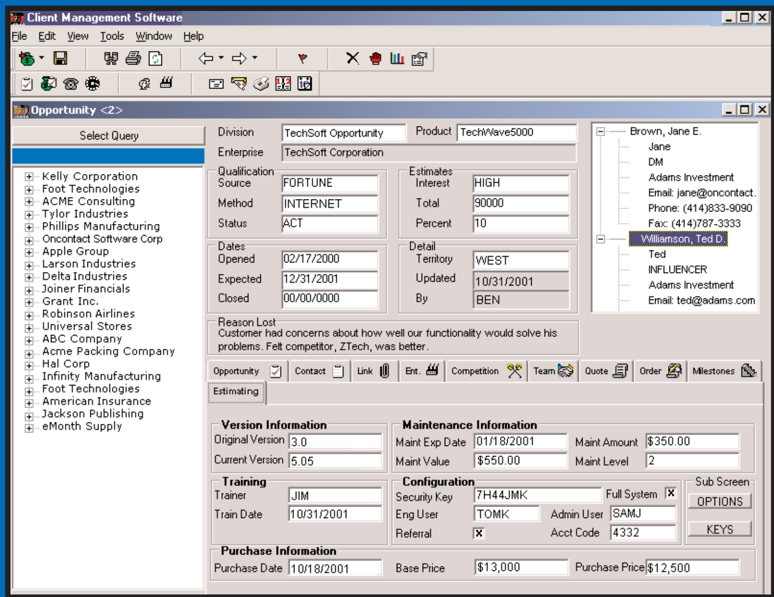


This opportunity profile tab displays detailed tracking of specific criteria for this opportunity. The tab shows which software the sales prospect currently uses, implementation specifics and reason for using the software. This screen is designed to help the sales team determine the direction and focus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



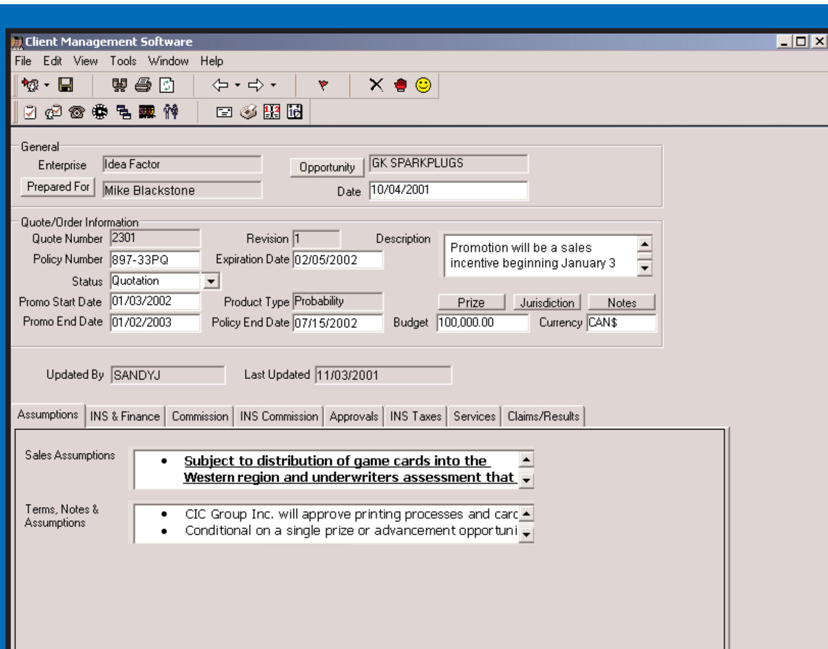
SOFTWARE MANUFACTURER



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



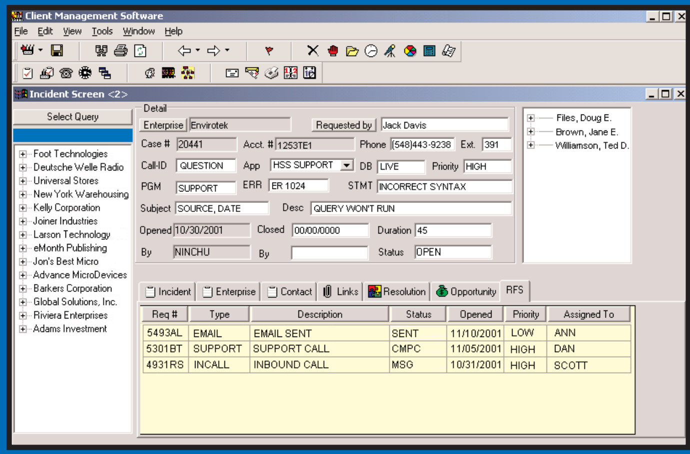
This detailed quote screen stores information that was collected when a user created the opportunity with a wizard. Responses from the pricing department can also be captured. Additional tabs store commission, costs and approval information.

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

TECHNOLOGY COMPANY

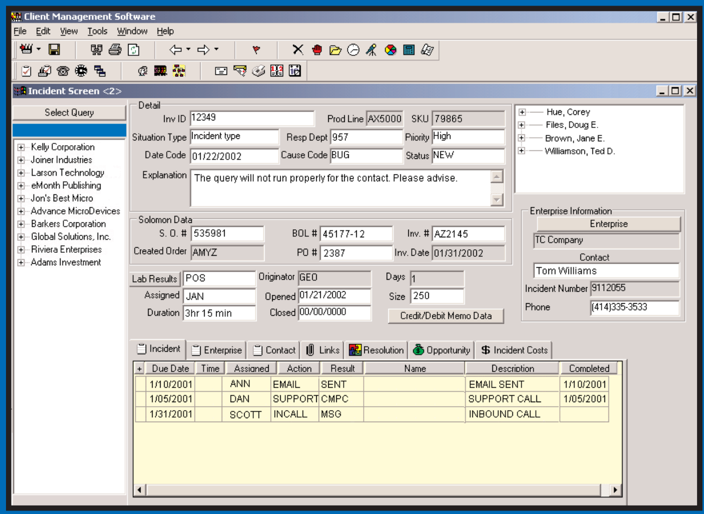
Customization of the Incident screen allows the user support center to streamline data entry on cases. Detailed information was added to the main portion of the screen, including type of call, status of system and description of issue. Users are now able to quickly gather information and pass it on to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



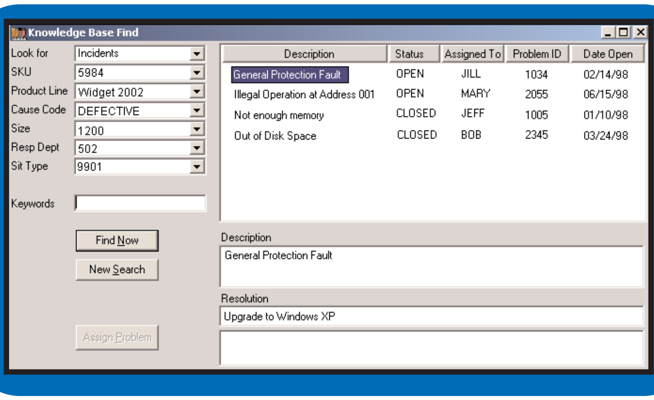
MANUFACTURING COMPANY

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.



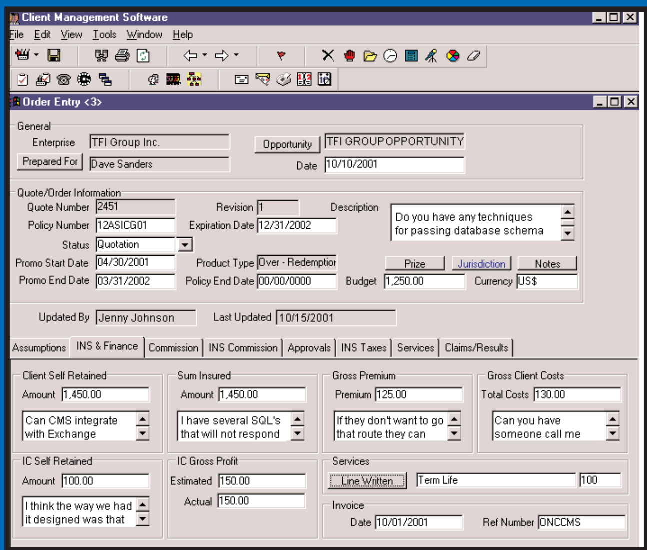
KNOWLEDGE BASE



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

CMS SUB SCREEN

SWEEPSTAKES ORGANIZATION

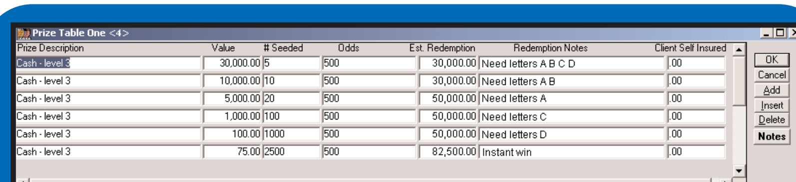


This organization creates, promotes and insures sweepstakes games. This customized screen tracks important insurance information for a sweepstakes promotion.

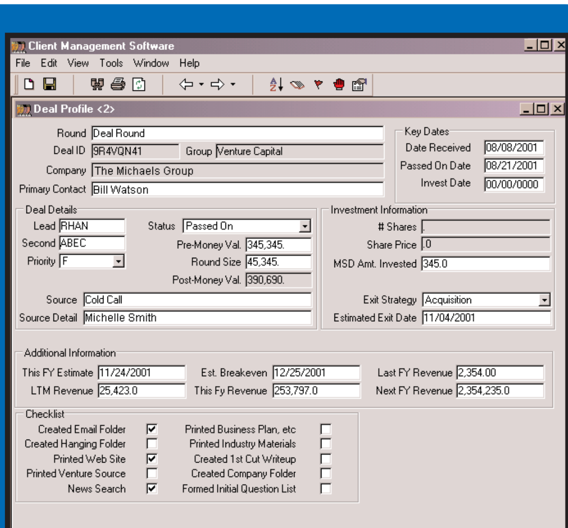
The company created the INS & Finance tab to display-in one convenient place-all necessary policy details, including insured amount, premium and client costs.

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



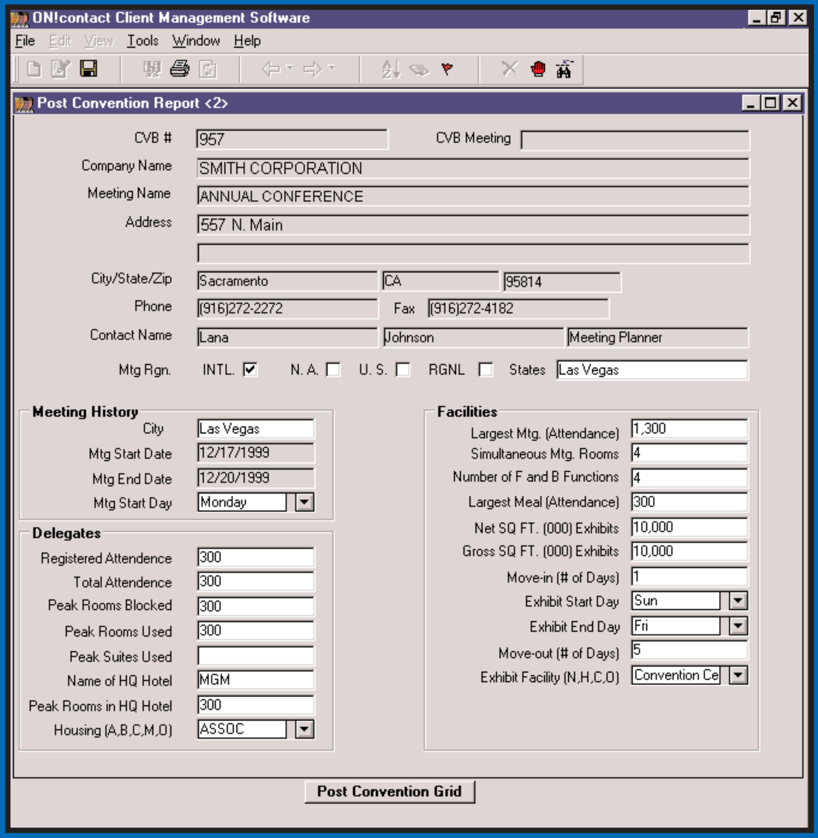
FINANCIAL ORGANIZATION



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

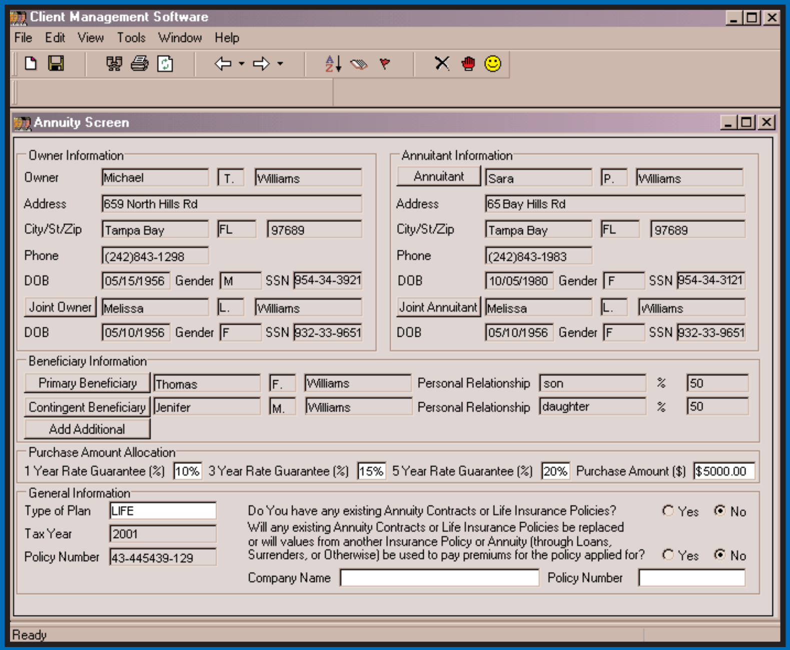
This company provides a profiling service to meeting planners. This screen records data about a meeting, meeting attendees and the facility used for the meeting. This data is conveniently stored as a meeting history within CMS for quick retrieval as necessary.



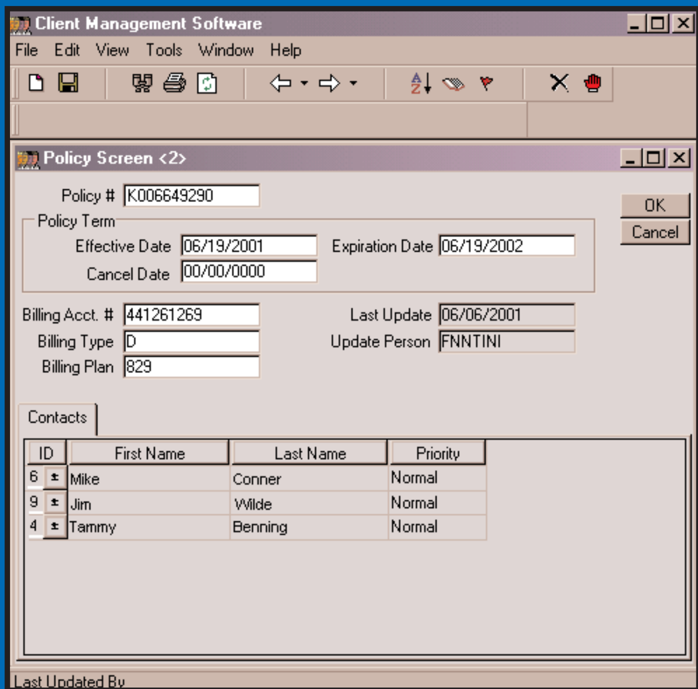
FINANCIAL ORGANIZATION

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.



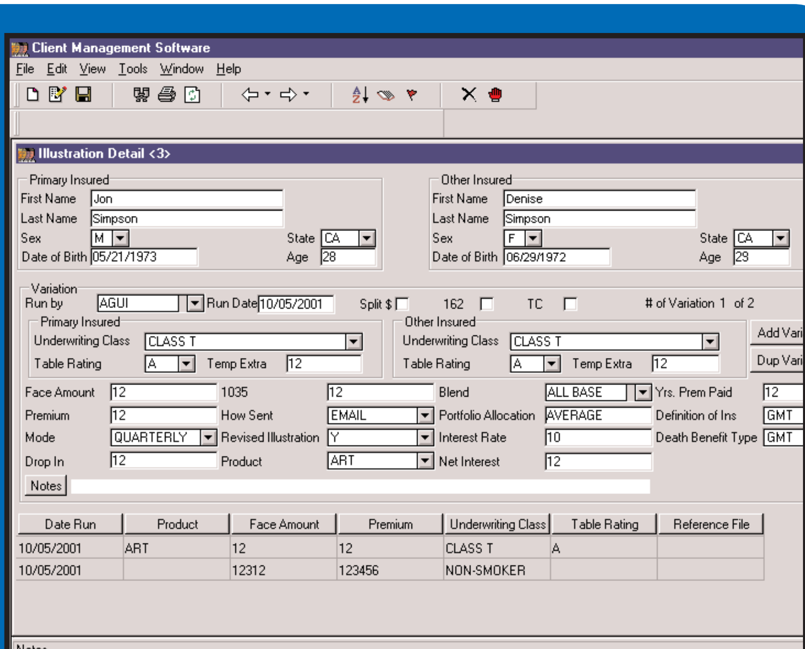
INSURANCE INDUSTRY



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



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

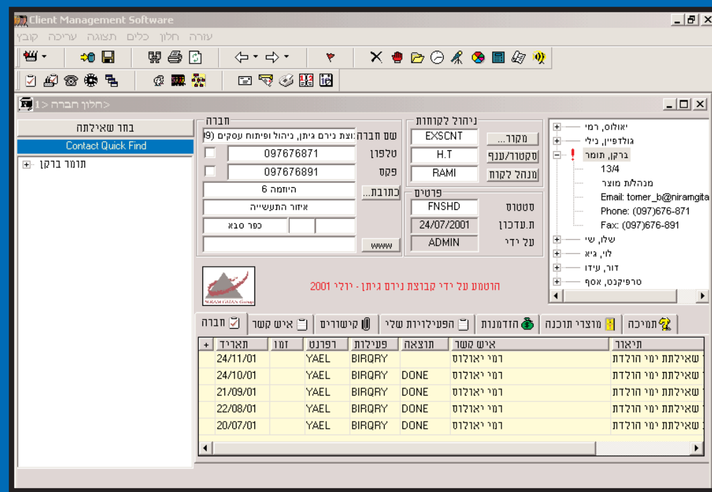
The screen contains all pertinent profile information for the primary insured, as well as other insured individuals.

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

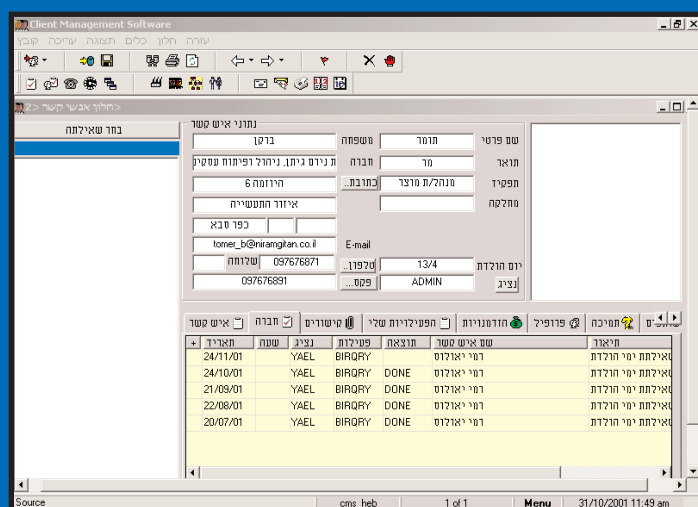
LANGUAGE TRANSLATION

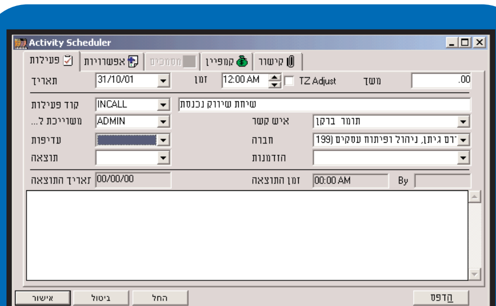
This company is a multi-disciplinary consulting firm that provides CRM products in Israel and some parts of the Middle East. The company uses the enterprise and contact screens to track clients and, at the same time, provide a fully customized version of CMS to its clients based on individual need.

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.

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