CMS v. 9.0/Oncontact V v. 6.2 Review

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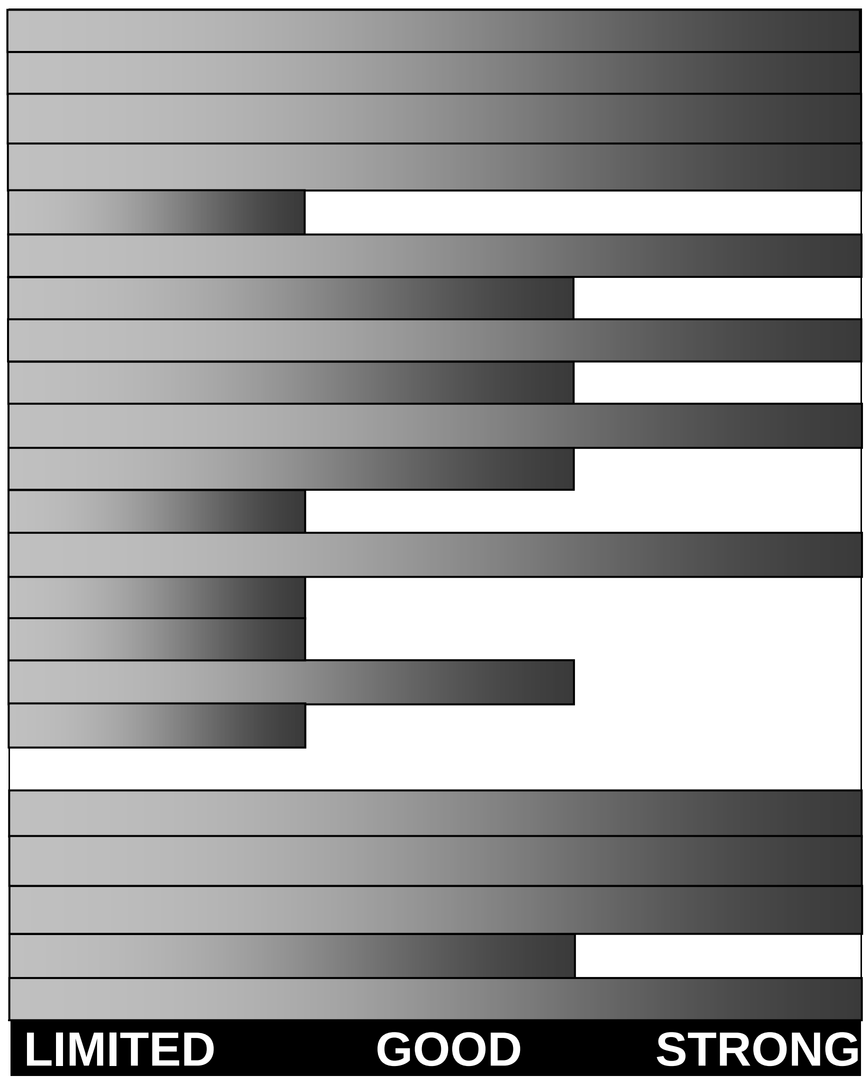
Background

YEARS IN BUSINESS	17
NUMBER OF EMPLOYEES	50
LICENSED SEAT/USERS SOLD – LAST 12 MONTHS	Vendor Disclosed
PRICE – MULTI-USER	See Appendix to this review
SERVER	No Charge

Business Functions

Contact Management	✓
Account Management	✓
Sales Management	✓
Time Management	✓
Customer Contact Center	✓
Customer Service	✓
Field Service	✓
Telemarketing/Telesales	✓
Marketing	✓
Lead Management	✓
PRM	✓
Knowledge Management	✓
Business Analytics	✓
e-Business	✓
Supply Chain Management	
Project Management	✓
ERM	
Web 2.0 Features	✓
Configuration	✓
Customization	✓
Data Conversion	✓
Real Time Features	✓
User Friendliness/Support	✓

Evaluation of Business Functions



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Overview

Client Management Software v. 9.0 (CMS) is a customer relationship management package that provides capabilities in the areas of contact, account, sales, time and lead management as well as telemarketing/telesales, field service, customer service, marketing, PRM, business analytics, real time features and project management.

CMS v. 9.0 is available in a Windows client/server as well as a Web platform. The Windows client runs on MS-Windows 2000/2003/2008, MS-Windows NT, and MS-Windows XP workstations. The Web client requires only a computer running Internet Explorer v. 5.5 or higher. CMS supports the Palm and Pocket PC handheld operating systems. CMS v. 9.0 is ODBC-compliant and supports MS-SQL Server, Oracle, Informix and Sybase database servers.

The CMS v. 9.0 package is targeted towards mid-sized companies within the financial services, health care, technology, manufacturing, distribution, and insurance industries.

In addition to CMS v. 9.0, Oncontact offers Oncontact V v. 6.2 (Oncontact V), a .NET-based CRM system written in Microsoft C#. The functionality of Oncontact V is the same as CMS v. 9.0. The only major difference between the two packages is that of the screen view. The Oncontact V screen interface is designed to resemble the Microsoft Windows XP screen interface. Oncontact V runs natively with MS-SQL Server and Oracle databases. Oncontact V is targeted to mid-sized companies in healthcare, insurance, manufacturing, finance, technology and bio-technology.

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Contact Management	**Strong**
Contact Profile	Ability to track name, phone number, address, Web and Email addresses. Also, a customizable screen is available via right mouse click or tool bar icon. This screen is supported by screen tabs that offer greater detail such as more phone numbers, fax numbers, addresses, representatives assigned to the contact, lists of mailings sent to the contact, and media source. A de-duplication function is available to prevent double entry of contact information. Ability to add new contact and companies through an intuitive "Add Wizard" function, which walks the user through the process.
Organization chart	Ability to access an organization chart set up in a tree-view. Ability to use the Enterprise Drill Down feature on each contact to display user-defined information such as title, address, Email address, phone numbers, Website address, etc. Ability to also drill down on each contact to access the profile screen.
Contact history	Ability to view all activities with the contact, by representative or by team. A browse table displays the activities, including Emails, where the user can drill-down into a line item for more detail. A right mouse click on this table will show notes attached to each contact. Users can track date, time, contact, representative action, result code, result date, and description of activity. The program places currently pending activities for the contact at the top of the activity list. Ability to sort by clicking column headers.
Account Management	**Strong**
Account Information	Ability to track team (enterprise) and representative (contact) information related to the account. Users can attach and synchronize third party files from the account screen via the attachment tab. Other user-definable tabs include documents, opportunities and support information. A right mouse click accesses user-defined screens related to the account, which are listed in a drop-down pick list (e.g., competition, product, purchase history, sales history, lead source, company aliases, and sales representatives).
Business relationships	Ability to drill down on each account to display account relationships with other companies (e.g., parent or subsidiary, partnership and distribution, etc.) set up in a hierarchical tree structure via the Enterprise Drill Down feature.
Activity management	Enterprise tab has activity history at enterprise level. My Activities tab shows only activities of the user that is logged in. Activity Manager allows a user to slice and dice activity information for analysis purposes. Ability to select a time period and view actions (calls, Email, etc.) in list format as well as graphic (pie chart) which can be drilled down upon. The user can move between contact, enterprise, incident, etc. Ability to track activities by date, time, type, description, representative, etc. and to log history by contact, enterprise and opportunity. CMS Today shows a day view of tasks and calls specific to the user.
Order entry	Ability to generate a quote with ID #, status, created by, product code, manufacturer, quantity, price, discount and total. A trigger or agent that restricts the amount of the discount awarded to the customer supports automatic calculation of a quote. Ability to issue a quote and turn it into an order, which can be turned over to a third party back-office software package such as MS-Great Plains, Oracle Financials or SAP R/3.
Order history	Ability to track an order reference number, opportunity name, priority, status, opening date and amount, within the opportunity screen. Ability to access account information such as current balance, open orders, last invoice, sales discounts, aging accounts, credit limit and available credit via the Accounting Information feature.

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Sarbanes-Oxley Compliance Features	Ability to configure the Oncontact workflow for Sarbanes-Oxley Compliance functionality.
Sales contract generation	Ability to merge quote information into a sales contract template created within the attached reporting package, Crystal Reports or MS-Word. The application automatically assigns a contract number (for tracking purposes) to a contract within the Number field and includes pre-defined fields for contract description, status, date created, start & end date, type of support, total value, total time, time used, notes and product line.
Quote/proposal generation	Ability to merge quote information into a proposal template created within the attached reporting package, Crystal Reports, or MS-Word.
Sales Management	**Strong**
Opportunity management	Ability to record unlimited opportunities, with attached contacts, their roles and unlimited quotes. The opportunity screen features tabs such as opportunity list, contacts, attachments, enterprise, competitors, area of interest, teams and steps. Ability to attach a value to each completed step that can be used to calculate the probability of close. A "team" tab can support team selling by giving team members access to shared files, which permits team members to remain updated on activities, events and the team member responsible for executing the activity or task. A competitor's tab can be accessed to track the competitors' efforts, strengths and weaknesses. Incomplete action steps can be tracked and Email notification of incomplete steps can be sent to the appropriate team members. Access to the files of a sales opportunity can be restricted to the team members on the project. Ability to route a sales opportunity to an appropriate action plan that will increase the likelihood of closing the sale. Ability to add an opportunity through an "Add Wizard" which walks the user through the process. The user can furthermore indicate the reason for the win or loss of the opportunity in the Opportunity Resolution Window.
Sales cycle analysis/sales metrics	Ability to select a specific sales methodology to qualify an opportunity via a pick list of sales methodologies (e.g., Miller Heiman, Spin Selling, Value Added Selling, etc.) accessed from the Method field in an opportunity profile. As each sales cycle stage within the selected sales methodology is completed, the Total and Percent fields under the Estimates heading will change to reflect the likelihood of closure. The Milestone tab within an opportunity profile lists the milestones within the selected sales methodology and indicates the start and end date of each milestone along with its status (e.g., open, in progress, complete). Ability to access many pre-defined reports for analysis such as opportunity status by source. Ability to access 2-D & 3-D charts for graphic display of sales cycle statistics. Ability to access sales metrics for a marketing campaign (e.g., total, sold, lost opportunities, cost/opportunity, cost/inquiry, cost/sales, total revenue, etc.) via the Campaign Maintenance feature. Ability to configure the Crystal Reports reporting package to create sales metrics (e.g., win/loss, close rates) and reports.
Territory alignment/assignment	Ability to set default territories to which accounts are automatically assigned. Ability to over-ride the defaults and manually assign a territory to a single user or a group of users via the actions feature.
Activity reporting	Ability to use the Activity Manager to get quick views of activity information. Ability to access a summary or detailed report of completed/incomplete activities for representatives. An Enterprise Activity Report is also available to track all activities within an account (e.g., enterprise name, first/last name, action code, assigned to, scheduled date and result code).

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Sales coaching tools	Not available with current release. Ability to integrate with Sales Progress's Sales Scoreboard application.
Mapping tools	Ability to automatically track the address, city, state, and postal code for mapping purposes to a third party tool such as MapQuest or Yahoo! Maps. Also, ability to track the county code, country code, latitude, and longitude of any contact or company address. A third party mapping tool such as MapInfo can easily access any of this information.
Expense reporting	Ability to track representative name, department, address and date. Ability to track either charge card or mileage expenses. The expense reporting functionality calculates total expenses, determines any funds due and can be used to track expense advances.
Lease management	Not available with current release. Ability to customize the Order Entry screen that is provided.
Time Management	**Strong**
Calendar	Day/week/month/year views available. Ability to schedule an activity from within the calendar with icons available to represent different types of tasks. Open/closed folder icons within each view indicate incomplete/completed tasks. The day view displays all tasks and calls scheduled for the day and the contacts that are to be involved. Bi-directional integration with MS-Outlook for contact, account, calendar, tasks, and Email. Bi-directional integration with Lotus Notes is also available. Users can create new accounts, contacts, activities and incidents directly from MS-Outlook. Users can also have the information automatically synchronized between Oncontact and MS-Outlook. Sending an Email from Oncontact using Microsoft Outlook is a one-step action because MS-Outlook is the built-in Email client. When a user sends an Email from Oncontact, the message is accessible in Oncontact and in the Outlook 'Sent Items' folder. Similarly, messages sent to a user's Outlook inbox are captured as activities in Oncontact.
Task lists	The To-do Query can be used to show all task items for the user currently logged in. The Query Builder permits the user to filter scheduled To-dos by contact, account, activity type or date. The list supports drill down for more detail. The information displayed can be customized. Ability to click once on the contact/account and this will display the appropriate profile information.
Email	MS-Outlook integration options include automatic posting of MS-Outlook Email into the CMS Email system as an activity or use CMS Tools and select Resolve and use CMS New to set up New Activity in the Activity Scheduler, which appears in Enterprise tab. Oncontact has written code for Email blasts in MS-Outlook to Send Individually and Add CMS Contacts or Accounts so that Email recipients do not see the list of other recipients. The CMS Contact and CMS Account menu option permits a user to exclude Email messages from a contact or account history for security or privacy reasons.
Transaction log/audit trail	Automatic date, time and user stamping of activities are available.
Customer Contact Center	**Limited**
Customer self-service	Ability to access customer self-service via User ID and password from the ClientNet module. The user has the ability to view relevant contact, account and opportunity profiles. The user additionally has the ability to download literature, search the KnowledgeBase (via keywords on product), view FAQs, check order status, and track/submit service requests.

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Automated Email response

Automated Email response can be based upon specific workflow rules and agents to deliver personalized Emails.

Interactive calendar/ workforce management

Ability to manually assign tasks to workforce staff members by building a query to filter workforce staff members with certain skills or area of interest. Ability to track workforce staff information including title, job function, security level, Email addresses, commission rate and work mode within the Human Resources (HR) module.

Interactive support/multimedia portal management

Not available with current release. Vendor claims ability to integrate with Sybase portal products.

Customer Service

Strong

Incident assignment

Ability to store incident/support case details including status, priority, relevant product and version. The incident can be assigned to a chosen user. Also, an organization chart of the contacts (e.g., external or internal) involved can be viewed from the incident screen. Documents can be attached to the incident for reference. A resolution tab is available to search the database for a method of solving an issue and a problem tab is available to track product defects from the manufacturer. Full word match is available for Knowledge Base queries.

Incident escalation

Ability to escalate an incident automatically or manually by changing the incident status field. Ability to attach an agent to the support case, which can be used to request Email notification to be sent to a supervisor upon escalation/completion of any support case.

Incident lifecycle management

Ability to track the activity history of a case from start to resolution via the Activity History function within a case profile.

Problem resolution database/ search

Ability to search for problem resolutions within the CMS knowledge base via a keyword search. Ability to save resolution details within a Resolution tab of a product/part defect record.

Incident reporting

Ability to utilize Crystal Reports to generate user-defined incident reporting. The reporting module allows the user to save reports for future use. Ability to also integrate with Crystal Reports for incident reporting. The Support Funnel can be used to view support cases by status (e.g., open, old, closed, etc.) via a browse list.

Order management

Ability to track status and location of an order. Any return order can be reviewed for quantity, status of delivery, tracking numbers with carriers, etc. Ability to integrate with a third party package such as MS-Great Plains, Oracle Financials or SAP R/3 for more comprehensive order management.

Return authorization management & analysis

Ability to record return/refund information in pre-defined fields for company, contact, product, quantity, unit price, reason, credit, freight and notes via the RMA (Return Materials Authorization) feature. Ability to integrate with third party accounting applications for crediting of accounts and tracking of financial information related to returns/refunds.

Service level agreement management/warranty management

Ability to access service level agreement management functionality within the Contract Screen. The application will automatically assign a contract number (for tracking purposes) to a contract within the Number field of the Contract Screen. The Contract Screen includes pre-defined fields for contract description, status, date created, start & end date, type of support, total value, total time, time used, notes and product line. Ability to access warranty agreement management functionality within the Contract Screen. Ability to automatically assign a contract number (for tracking purposes) to a contract within the Number field of the Contract Screen. The Contract Screen includes pre-defined fields for contract description, status, date created, start & end date,

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Service level agreement management/warranty management (continued)	type of support, total value, total time, time used, notes and product line.
Field Service	**Good**
Call handling/dispatching/ scheduling/workforce management	Ability to dispatch calls and To-dos to field service personnel through the ‘assigned to’ feature within the activity scheduler. The system notifies a user of scheduling conflicts and also allows for viewing the schedules of field staff prior to dispatching. The system can also notify the user via Email when the activity has been completed. Field force staff can synchronize with the database through their laptops or Palm, BlackBerry or MS-Windows CE handhelds.
Inventory management	Not available with current release. Ability to integrate with third party ERP systems. Vendor also claims general inventory management functionality is available in a financial management module, but this was not demonstrated.
Problem resolution management	Ability to view if activity concerning a problem has been completed, date completed, time completed, and by whom completed. Ability to access history of resolutions by date, time, contact, rep., type of action, result, result date, brief description, and contact title.
Time and expense reporting	Ability to track charge card or mileage expenses, representative name, department, address and date via synchronization with laptops, Palm Pilots or MS-Windows CE devices.
Remote knowledge management	Ability to integrate with Palm 7.0+ to the CMS system for access to Knowledge Base.
Wireless application ability	CRM information can also be accessed on any handheld PDA that supports a Java enabled PDA web-browser. CRM information can also be accessed on any handheld PDA through a cradle-sync with their personal Email and calendar manager (PDA version of Microsoft Outlook, Lotus Notes, Novell GroupWise.) This is part of the CRM application suite that Oncontact provides. Enterprise wireless applications are built-in the CRM application suite.
Telemarketing/Telesales	**Strong**
Call management	Ability to access screen pops, inbound and outbound call management. Ability to set up calling queues as well as set up Activity Scheduler options. Call Control options include answer, hang-up, transfer, hold, etc. Ability to assign and reassign calls to users, with the option of linking related information via a manual or automatic attachment of files, based on pre-defined agents or triggers.
Scripting	Ability to access standard branch scripting, calling queue and related telesales functionality. The Form Painter and Navigator offer the ability to define the branched data / response driven process through which call center reps are led. The Navigator supports the definition of automatic scoring / evaluation rules that auto qualify as script sessions are carried out. This supports the definition of additional processes such as rep assignment, sales cycle assignment, work flow automation, etc.
Call recording	Ability to track calls within the Call Management Center. Ability to view history, action, and call notes. On activating the auto-dial feature a call result request is triggered, which prompts the user to record call details. Ability to integrate with a third party TAPI-compliant package to record call duration.

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Call statistics/reporting	Activities Completed Detail Report is available to record call statistics. The report can indicate the number of calls made, time spent on each call, information concerning each call and percentage of completion. Ability to use Crystal Reports to generate user-definable call reports.
Auto-dialing	Ability to integrate with Artisoft tools for power dialing (i.e., the first available number from a queue of telephone numbers is dialed, but if there is no response the next number in the queue is dialed and so on) and access to on-line notes.
Marketing	**Good**
Campaign management	Ability to create a campaign and to track the project code, description, type, manager, and target as well as status indicators such as date created, date started, date ended, status and stage. Also, the user can view the stages of the campaign as well as statistics such as the number and amount ($) of lost/active/sold opportunities to measure the effectiveness of a campaign compared to actual and budget costs. Ability to click on stages in browse list to view a profile version of that stage. Ability to create activities for contacts that are part of a campaign. Ability to use the Activity Manager to quickly slice and dice information about a campaign. There is also a graphical campaign funnel.
Marketing (media) encyclopedia	Ability to view files in a tree format within the Marketing Encyclopedia. Also, ability to perform a query of the information in the Marketing Encyclopedia as well as send files via Email or fax.
Predictive modeling tools	Ability to access the Oncontact Activity Manager Module with which the user can research and predict trends within an account, date range, opportunity, support trend, campaign, etc.
Product/price configurator	Ability to access product configuration functionality as a standard part of the Oncontact Order Entry system and can be customized to configure proposals and orders exactly to a company's needs.
Search engine marketing	Not available with current release.
Customer lifetime value	Ability to track and graphically review any contact, opportunity, account, support case, etc. to aggregate the complete lifetime value the customer has provided to the company.
Customer survey management	Customer surveys must be customized via HTML scripting. Surveys can be made available over the Web or via Email. Survey results can be analyzed in a customized Crystal Reports report template.
Literature fulfillment	Ability to choose from pre-defined pick lists of literature, batch processing of fulfillment requests via the Select Enclosures feature. Ability to view costs associated with specific mailings via the Document tab of the Activity Scheduler feature or via a customized report.
Word processing capabilities	Ability to access a set of standard MS-Word templates that can be used as the foundation for creating the corporate library of letter templates. The mail merge function can merge addresses into a letter template. The program also has the ability to integrate with a third party package such as MS-Word.
Lead Management	**Strong**
Optimization	Ability to generate new leads via a search of various criteria with integration with the Dun & Bradstreet database or any database in ASCII format. Ability to download leads from the Web and assign the lead to a representative or to an action plan, including Email notification of new leads to team members. A user can define workflow based on an individual campaign. Activity agents or

Optimization (continued)	triggers can be configured to schedule follow-up actions related to the lead such as literature fulfillment, phone calls, notification of assignment via Email and notification of a completed activity. Reporting function is available for calculating cost per lead and return on investment.
Incubation	Ability to set up an activity to recontact a lead at a future time period for lead requalification.
Qualification/prioritization	Ability to customize criteria for prioritization such as annual sales (revenue), employees (# of) or other custom code fields. Also, vendor claims ability to create dynamic branch scripts, which can have scored answers to help qualify a lead.
Routing	Ability to set up an automatic routing process for all leads by any criteria via the Navigator feature.
Tracking	Ability to track leads by any criteria or via a keyword search.
Partner Relationship Management (PRM)	**Good**
Channel program management	Ability to view literature, products and pricing information, product upgrades, and product manuals related to the sales channel partnership through the download tab in PartnerNet.
Opportunity/Sales management	Ability to view date opened, description, status, total, and expected close through the opportunities tab in PartnerNet. Ability to register new sales opportunities and view detailed information on the opportunity such as source, interest, territory, etc. Ability to view date ordered, order number, status and type through the orders tab in PartnerNet. Ability to create new orders.
Marketing/Lead management	Ability to view surveys, product and pricing information and marketing literature through the home tab in PartnerNet. Ability to assign leads to a particular partner using the Partner Assignment window.
e-Service	Through PartnerNet, users can review, update, and submit customer service information online as well as perform self-service functions to resolve their issues.
Knowledge Management	**Limited**
Information feeds	Ability to access information feeds from Websites; XML exchanges, etc. can be automatically brought into the Oncontact system in any appropriate module to bring up to the minute information that is appropriate for its users.
Inference engines	Limited ability to query the Knowledge Base using keyword and quick searches.
Document management	Not available with current release. Ability to integrate with DocumentThem! or PCDocuments for document management functionality.
Business Analytics	**Strong**
Pre-defined reports	Over fifty pre-defined report templates are available for account management, call reporting, opportunity management and marketing. Crystal Reports is provided with the package. Ability to filter data to be used in a report. Ability to also access support for Microsoft SQL reports.

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User-defined reports	Ability to use the Client Management Software query builder and present data for user-defined reports in Crystal Reports format. A user can also define a report, save it as an object and choose (via radio buttons) which data set is to be exported to. Ability to query on all CRM data as well as ERP, if it is integrated.
Pre-defined queries	Ability to query any field in the database and to save it as a pre-defined report for future use. Pre-defined queries can be executed to track activities, completed calls, general incidents, incidents by contact, incidents by To-dos, lead sources, open incidents, To-dos by opportunity, etc. The user has the ability to augment the query with filters. The user can additionally set up pre-defined queries as favorite queries and access such queries via the Select Query menu option.
Ad hoc query generator (query by example)	The Client Management Software query builder allows the user to build queries and to perform query by example (QBE) with the ability to distribute them to other users.
Automatic roll-up/drill down capabilities	Automatic roll-up of information is available for all reports.
Forecasting/planning tools	Ability to create a forecast and to include it in a report with projected values of opportunities and total expected value. Also, the user can create a chart to show the values in the report within a graph.
Graphical or statistical modeling tools	Ability to use the Activity Manager to do quick analysis of data. Ability to create 2D or 3D pie and bar charts using the Client Management Software graphing tool. Ability to graph a maximum of two values at a time. The GraphIt button permits the user to access options for graphing data in a variety of charts.
Dashboard/portal interface of key indicators	A configurable dashboard is available. The dashboard can be customized based on the specific requirements of an individual, group or company. The dashboard can display a calendar, listing of activities and opportunities, along with graphs.
Notification of Website updates/ changes	Notification of when a Website has been updated or changed can be accomplished with a workflow agent designed in the Navigator toolkit.
Alert/alarm capabilities	Ability to set thresholds and send automatic Emails to managers when a threshold (e.g., sales revenue, sales figures, etc.) is reached. Alerts and alarms can be executed either through the Oncontact system natively or through the alarms capabilities of the bi-directional integration Oncontact has with Microsoft Outlook.
e-Business	**Limited**
Personalization	Personalization and preferences by each user can be maintained within the system on how a particular user wishes to use the system. Areas of personalization include start screen, start queries, security access, etc. HR Manager can be used to set up access rights, security level, options for start-up to determine first screen that will show up, and preferences for pop-up items.
Portal capabilities	Ability to access partner information over the Internet via the PartnerNet portal and provide customer access to company information via ClientNet. EmployeeNet is for internal personnel.
Content management	Not available with current release. Ability to have information such as surveys available to users along with new product information.

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Storefront	Not available with current release.
Order/transaction processing	Not available with current release. Oncontact is integrated with a wide variety of back-office financial management and accounting systems to track payment history, shipping history, delivery history, etc. This information can be brought natively into the Oncontact system.
Online customer behavior analysis and reporting	Not available with current release. Vendor claims third party integration.
Supply Chain Management	**Limited**
e-Procurement	Ability to integrate with Red Prairie for e-Procurement functionality.
Interfaces to B2B exchanges/ software packages	Not available with current release.
Logistics management	Not available with current release.
Product lifecycle management	Not available with current release.
Project Management	**Good**
Project Tasks/deliverables	Ability to specifically track a specific project, the steps within the project, and the deliverable results of each step within a project within the Project module.
Contractor/subcontract relationships	Ability to add, update, and review any contractor or subcontractor involved in a specific project and its hierarchy.
Project resource allocation	Ability to assign different people with different project resource allocation to a project.
Time/expense management	Ability to define specific costs for every action taken with Accounts/Contacts. This allows for rolled up expense tracking/reporting at any desired level (e.g., Rep, Account, product line, etc.).
Employee Relationship Management (ERM)	**Limited**
Employee performance	Ability to view a salespersons quota, YTD quota, commission rate and commissions YTD in the Oncontact HR Module.
Employee training, skills	Not available with current release.
Compensation management	In the Oncontact HR Module, users can review their own performance such as quota, year to date quotas, commission rates and commission YTD.
Equipment management	Not available with current release.
Web 2.0 Functionality	**Not available with current release**
Links to social networking Websites, blogs & online communities/forums	Not available with current release.
Access to video spots	Not available with current release.
Access to mashups	Not available with current release.
Access to widget technologies	Not available with current release.
Access to wiki databases	Not available with current release.
Access to podcasts	Not available with current release.
Access to tagging capabilities	Not available with current release.

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Technical Features

Workflow

Process configurability	Workflow is written once and can be deployed in both Windows and Web applications. The Client Management Software Navigator provides a graphical environment where company wide processes can be created and maintained within the central production database and automatically executed. These processes can be applied within any Client Management Software component and involve any number of company wide users, both inside and remote. The Client Management Software Navigator supports database and company wide logic definition that is initiated by data / events throughout the system. Additionally, the tool allows third party application functionality and code to be called.
Alerts/notifications	Client Management Software offers a standard Alert Window function that can be applied to Contacts, Accounts, Opportunities, Customer Service Incidents, etc. In addition, the Client Management Software Navigator can be used to define database rules that trigger automated alerts / notifications based on delinquent activities, sales opportunity stages, account turnover, etc. Again, organizations can use any system data or event to trigger the alert.
Task reassignment	Tasks can be reassigned automatically using pre-defined escalation rules based on delinquency. The Client Management Software QueryBuilder provides alternative re-assignment functionality allowing Management to re-assign tasks on a mass basis by first querying the database in any user-defined fashion using all system data.
Workflow personalization	The Client Management Software allows the end user to create activity chains and alerts without the need to use an IT Manager's assistance. Activity chains can be a simple or complex schedule of activities to map out a sequence of events. Alerts notify users or groups with a pop-up window on individual records. Activity chains and alerts can be created by the end user without the use of the Navigator.

Architectural Consistency

Are all your software modules on the same architecture?	Yes. Oncontact CRM system runs on MS-Windows or Web-based platform with the same data model.
Are all your software modules seamlessly integrated together?	Yes. Oncontact offers all modules integrated together for one, per user price.

Specifications

Desktop/laptop operating systems supported	MS-Windows NT 2000/2003, MS-Windows XP, MS-Windows Vista.
Handheld operating systems supported	Palm OS device with Palm.Net wireless Service, Windows Mobile, BlackBerry.
Application server operating systems supported	MS-Windows 2000/2003/2008/Vista, MS-Windows NT based server, MS-Windows XP, Unix, Novell.
Wireless technologies supported	Palm OS device with Palm.net wireless service.
iPhone integration	No iPhone integration is available.

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Scalability	Vendor claims 10-1,000+ users.
Users per application server	Database dependent.
Web services capability	Ability to integrate to Microsoft .NET objects. Runs with any Internet Explorer 5.5+ browser.
XML integration	All data can be used in XML anywhere in the application suite.
SOAP integration points	XML as a native communication protocol and can communicate with SOAP-compliant services using XML-formatted data.
XSLT & CSS support	Yes.
ERP integration	Native support for Great Plains and Peoplesoft (now part of Oracle). The most common integration points include order entry, order configuration, invoice information, last order information, inventory, etc.
Interactive voice response integration	Not a standard out-of-the box feature. However, the system can be configured to support IVR systems.
Point solution integration	Point solution integration varies by the type of application and the needs of the client. Point solution integration might be to a supply chain management system or to a custom-built legacy system.
Specific links/hook into third party business intelligence software	The CRM system is shipped with Crystal Reports 11 from Business Objects. There are about 50 standard reports with the CRM system. Also, a client can configure or add any reports as needed. The CRM system can also be integrated with a variety of other Business Object products and other analytics tools from other vendors.
Bulk Email distribution	This is most commonly handled with Oncontact's bi-directional integration with Microsoft Outlook.
Can Email be brought into the CRM system without loading or integrating with local resources?	Oncontact is bi-directionally integrated with the Outlook Client for email. Any email received from Outlook can automatically be brought into the CRM system.
Telephony switch and/or PBX integration	Oncontact is TAPI compliant out of the box and provides integration to a wide variety of phone switches including Nortel, Lucent, and Artisoft.
Software programming language(s) used for development	PowerBuilder, XML, HTML, DHTML, Javascript, C#, ASP.NET.
Software architecture(s)	N-tiered.
Current software release date and platform(s)	May 2008.
Security architecture	Security can be enforced either at the application level, database level, or middleware level. All security is field level driven with parameters for read, write, access, and delete privileges.
Network single sign-on compliant (LDAP)	Yes.
Directory support	MS-Active Directory.

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Minimum hardware requirements for desktop/ laptop client	Pentium 233 or higher, 48+ MB RAM.
Minimum hardware requirements for application server	Pentium level processor (or higher), 48+ MB RAM (or higher), 60 MB of hard disk space for the database (dependent on data volume).
Minimum hardware requirements for handhelds	Any device that supports Outlook mobile.
Toolkits used in software development and customization	Oncontact Customizer – used for screen customizations. Oncontact Navigator – used for workflow customizations.
Database servers natively supported	Microsoft SQL Server, Oracle, IBM Informix, Sybase. These databases are supported through native drivers and Oncontact has a much faster connection with these databases than through a normal ODBC connection.
Application server software	Application server software included in per-seat price of software. The Oncontact CRM system can run with a variety of application server software components.
COM/CORBA compliant	Yes, both COM and CORBA.
Laptop databases supplied with package	Sybase SQL Anywhere or Microsoft SQL Server – client edition – sold separately.
Handheld databases supplied with package	None.
Database protocols	Primary method of database connection: Native. CMS can also utilize ODBC and OLEDB if desired.
Connection mode	LAN, Web-based, Wireless, Mobile with Data-synchronization, Windows Terminal Services, Citrix.
Client-to-server synchronization	Field Level Client to Server Synchronization. Field level server to server synchronization. Synchronization tool is vendor developed.
Server-to-server database synchronization supported	Field level server-to-server synchronization is supported natively.
Portal technology tools supported	Internally developed and supplied by Oncontact. Portals include eCMS EmployeeNet, eCMS ClientNet, and eCMS PartnerNet.
EII solutions for portal interfacing to multiple data sources	The Oncontact CRM system has a 100% open database architecture so information can be made available as desired to appropriate third party systems.
Instant messaging capabilities	Not available with current release. The Oncontact CRM system can be integrated with leading instant messaging software suppliers for this functionality.
Speech recognition supported	Supported with integration with third party tools.
Thin-client supported	CMS has a fully Web-based thin client with no download on the client necessary for complete operation.
Source code available/included	Source code is available in escrow.
Office productivity packages integration	MS-Office Products.

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Bi-directional integration with Groupware platforms	MS-Outlook and Lotus Notes for Email, calendaring, tasks, and contacts. Also, integration with any MAPI Email system such as Eudora, Groupwise, etc. Users can create new accounts, contacts, activities and incidents directly from MS-Outlook or Notes. Users can also have the information automatically synchronized between Oncontact and MS-Outlook or Notes.

Implementation

Integration

EAI tool	Oncontact provides its own integration tools and the entire CRM system can be integrated with a wide variety of third party applications for real-time integration.
EAI vendor partnerships	Oncontact has partnerships with all major database vendors including Microsoft, Oracle, IBM, and Sybase for application integration. Vendor claims integration with MS-Biztalk, BEA, Vitria and TIBCO.
OTLP integration capabilities	Yes, standard feature of the Oncontact CRM system.
Batch integration capabilities	The Oncontact CRM system provides batch integration capabilities and can take almost any data from any proprietary or non-proprietary source and bring that data directly into the Oncontact CRM system. Further, once the data has been brought into the Oncontact CRM system, the data can be introduced to workflow scenarios, data edited, etc. and this data can then be funneled back to its original source for bi-directional integration from its native source.
Integration templates, examples	Yes, provided as standard with the Oncontact CRM system.
Pre-defined integration points	Yes, provided as standard with the Oncontact CRM system.
System base configuration tool	No system base configuration tool is available.
Configuration tool criteria	No configuration tool criteria is used for configuration.
Reverse engineering tools	Oncontact Software utilizes the third party data modeling tool, CASE Studio for schema version control and ERD generation.

Implementation Team

Internal consulting services for implementation	Oncontact Software has a full staff of internal consulting resources for the CMS CRM system.
Size of internal consulting services	20 employees.
Partner network for implementation	Oncontact Software has a partner network of over 75 business partners that implement and service the Oncontact CRM system in over 25 countries.
Size of partner network	Oncontact Software has a partner network of over 75 business partners that implement and service the Oncontact CRM system in over 25 countries.
Partner certification process	Before any Oncontact Software Business Partner is authorized to implement CMS CRM software system, a business partner must achieve partner certification.
Certification classes/average class duration	To achieve first level certification a business partner must attend a 5 day training course. This course is held either at the headquarters of Oncontact Software or at the offices of the business partner. There are also five advanced course certification offerings as well. These include:` Learning and Managing Sync – 2 days Learning and Managing Reports & Queries – 2 days.

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Certification classes/average class duration (continued)	Import & Deduplication – 1 day Administering & Customizing eCMS – 2 days.
Certification exams	Each course has a corresponding exam for proper certification.
Administering certification exams	All certification training is accomplished through classroom training or through online Web training with a live instructor.
Re-training/re-certification process	When new releases are made available, all business partners are given instruction on new features, tools, and components of a new release. As part of the normal certification process, partners have dedicated coursework on performing seamless upgrades to subsequent versions of the CRM system.
<u>Time & Cost</u>	
Typical implementation duration for 50 users with minimum customization	30 to 90 days.
Typical implementation cost expressed as a ratio to software license cost	Typically, for each dollar that a company spends on software, the company will then spend approximately 50 cents to a dollar on implementation and training services.
<u>Configuration</u>	**Strong**
Add business specific fields-types	Ability to add business specific fields using Form Painter on any screen or tab throughout the application via point and click action.
Modify list contents	Ability to add, edit and delete contents on a specific list. Lists are triggered by category.
Restrict data entry to predefined pick lists	Ability to restrict data entry to specific pick lists.
Identify required and non-required fields	Ability to use icons or text color to indicate required fields.
Modify forms	Ability to modify forms via Form Painter administrative tools to perform this function anywhere in the CRM application suite.
Set permissions for different user groups at the form level	Ability to set permissions for individual and group users at the form level via role based selection with edit rights.
Set permissions for different user groups at the record level	Ability to set permissions for individual and group users at the record level for territory alignment/assignment.
Set up workflow processes	Ability to set up workflow processes via the Navigator workflow toolkit for individual and group workflows (e.g., opportunity management, customer service, lead routing and automated Email response).
<u>Customization</u>	**Strong**
Creation of calls to external business application	Ability to call external business applications via customization toolkit (Oncontact Form Painter). This could allow a contact management module to call a custom-built legacy system to provide order details within a portal window.
Dependent lists	Ability to set up dependent lists based on product, contact type, or any other pre-defined category.
Creation of application behavior based on values entered into particular fields	Ability to trigger an application or action via Oncontact workflow based on specific milestones or parameters being met.

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Creation of business specific forms and tables that integrate with the customer's application and database	Ability to create of forms via drag and drop functionality. Tables integrate with MS-SQL, Oracle and Unix databases. Legacy systems require customization.
<u>Data Conversion</u>	**Strong**
Import of records from multiple sources via data import tool	Ability to import records from multiple sources via the Oncontact Import Tool.
Available data import formats	Ability to import fixed or delimited formats directly from the Oncontact toolset.
Dynamic field mapping capability through the user interface	Ability to use the import toolset for mapping processes from normalized data in a file to any standard or custom Oncontact entities.
Creation of relationships between records via the import tool	Ability to create and maintain relationships both standard and custom within the import toolset.
Real Time Features	**Good**
Real-Time Dashboard	All information on the CMS dashboard is in real-time. The user can customize the dashboard via point and click actions. Vendor claims the ability to set up newsfeeds from external sources on the dashboard via .NET scripting.
Real Time Analytics	Ability to receive real time reports.
Real Time Currency Conversion	Vendor claims the ability to customize data feeds from currency conversion databases or Websites via the Navigator workflow development tool.
Real time Accounting Integration	Vendor claims that Oncontact has been integrated with accounting and ERP systems for real time accounting integration.
SOA Functionality	SOA functionality is provided by Oncontact's Web-based offerings. It can be accessed either through browser-independent HTML pages or by calling individual Web Services.
Rapid Application Development Tools (RAD)	New business objects and elements can be created within the Oncontact Customizer toolkit via .NET scripting.
Workflow Building Tools	The Oncontact Navigator toolkit enables users to customize workflow in a graphical flowchart diagram via point and click actions.
Business Object Configuration	Business object configuration is available via .NET scripting.
GPS Locator Capability	No GPS locator capability is available.
Unified Messaging	No unified messaging is available.
Mobile-Device Implementation	CMS supports the Palm, BlackBerry and Pocket PC handheld operating systems to view information in the CMS database only.

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User Friendliness/Support	Strong
Help function	
Help menu	Standard MS-Windows help menu available. A Wizards tutorial can walk the user through the process of adding a new contact, account or opportunity to the company database.
Context-sensitive help	Context-sensitive help is available with the Help Option on the Menu Bar.
Detailed error messages	Detailed error messages, which suggest a remedy for the error, are available.
Internationalization	
Multi-currency	Vendor claims multi-currency functionality is definable using Client Management Software Navigator.
Multi-lingual module support	Multi-lingual module support must be customized per module.
Translation capabilities/ integration	Vendor claims availability of a translation utility that allows for translation of the entire CRM system into any two-byte character language.
Foreign office locations	Oncontact Software has partner offices throughout North America, South America, Europe, Asia, and Australia.
International support	Oncontact Software has partner offices worldwide throughout North America, South America, Europe, Asia, and Australia. Oncontact has over 75 business partners worldwide that market, sell, implement, and support the CRM application suite.
Training	
Range of available options	Full Training is available for both end users and System Administrators in personalized classes held at either the customer site or Oncontact corporate offices. Oncontact also offers quarterly group training courses targeting specific application features such as data synchronization, Financial integration, Customizer / Navigator functionality, etc. Oncontact offers a Computer Based Training CD that allows organizations to distribute detailed application instructions to reduce ongoing end user training costs.
Training charges	Charges vary by business partner and region. Call vendor for details.
Support	
On-site support	Yes.
Phone support	Yes.
Toll-free number	Yes.
Technical and user documentation	Quick Tips, Implementation Guide, System Administrator Guide, User Guide, Customizer Training Guide and Database Design Guide. One full set of documentation is available for every ten users.
Web, bulletin board, on-line forums	Yes.
Maintenance/support charges	18% of the software list price per year, which includes all technical support and software upgrades.
Software warranty period	60 days.

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Reviewer's Comments:

Client Management Software v. 9.0 is a Web-enabled enterprise-wide customer relationship management software package that includes strong functionality in the areas of contact, account, sales, time, customer service and lead management, as well as telemarketing/telesales and business analytics. Also, Client Management Software offers the user good features in field service, PRM, project management, real time features and marketing. Client Management Software is an intuitive program and is easy to navigate via tabs, list views with moveable columns and drill down for more detail on line items. Client Management Software allows quick and easy access to user-defined screens relating to accounts, contacts or purchase history by using a tab, an icon on the toolbar or a right-mouse click. A Wizards tutorial provides step-by-step process for adding a new contact, account or opportunity to the Client Management Software database. In addition, a de-duplication function is available to prevent double entry of contact information.

All contact and account profiles are enhanced by having a tree-like view available for a hierarchical display of all related contacts within a company, including the title, role and position within an organization. This feature facilitates tracking teams and persons related to an account. Activity Manager allows a user to slice and dice activity information for analysis purposes. Ability to select a time period and view actions (call, Email, etc.) in list format as well as graphic (pie chart) which can be drilled down on. Orders can be entered into a quote feature with pre-defined fields for product, product code, manufacturer, quantity, price, discount and total amount. The vendor claims that quotes can be turned into orders and that orders can be tracked within the back office via integration with third party packages such as MS-Great Plains and SAP R/3. Sales contract generation can be accomplished via merging quote information from the Contract Screen into a sales contract template configured using Infomaker or Crystal Reports.

Sales management is enhanced by excellent opportunity management functionality. It is possible to embed a specific sales methodology to qualify an opportunity (e.g., Miller - Heiman, Spin Selling, etc.) and access that methodology from the Method field in an opportunity profile. As each step/milestone for an opportunity is completed, the probability of closing the opportunity is automatically updated. Incomplete action steps can be tracked and Email notification of the incomplete steps can be sent to the appropriate team members.

Time management tools include a calendar with day/week/month/year views. Group scheduling functionality is provided through bi-directional integration with MS-Outlook. Icons on the calendar indicate if a task is incomplete or closed. The user has the ability to request a notification when an assigned task has been completed. The Email Blast function permits the user to send out a large quantity of personalized Email messages to a list of customers/prospects.

The ClientNet portal enables an external user to view relevant contact, account and opportunity profiles via User ID and password access over the Internet. The user has the ability to download literature, search the Knowledge Base, check order status, and track/submit service requests.

Customer service functionality permits a user to search the database for an appropriate method of solving a customer service issue. Product issues can be tracked via the problem tab. The Returned Merchandise Authorization feature permits the user to track any returned merchandise. A power-dialing feature in the Call Management Center can be used in telemarketing efforts to automatically dial the first available number in a calling queue. If there is no answer or the call is completed, the next available number in the queue is then dialed. Call results are also recorded using the Call Management Center. The dynamic branch-scripting feature is also available to assist in the telemarketing efforts. Users can assign calls and attach related files based on pre-defined workflow or triggers.

Marketing features include the ability to create a marketing campaign and track the project size, status and the effectiveness of the campaign through built-in sales metrics (e.g., total cost, total inquiries, cost/opportunity, cost/sales, etc.).

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The Navigator feature can be used to define a lead management workflow and set up activity agents or triggers to schedule follow-up actions upon the completion of a step in the lead management process. New leads can be generated via a search of various criteria via integration with the Dun & Bradstreet database or any database in ASCII format. PRM functionality and access to the Client Management Software database records is available via User ID and password access on the Web-based PartnerNet portal. Forecasts and other reports are available via InfoMaker and Crystal Reports templates, which ship with the package. These tools allow users to create charts (e.g., 2-D, 3-D, bar, pie etc.) to graphically display projected values of opportunities, total expected values, etc.

Client Management Software also offers the user the ability, via the Client Management Software Customizer and Client Management Software Navigator, to customize the program. These toolkits allow the administrator to make on-line changes that are transferred to the users via synchronization. The Client Management Software Customizer permits the user to customize the screen via drag and drop actions. The Client Management Software Navigator permits the user to customize the workflow of the program. The addition of a new field can be performed by selecting from an entire database of fields from various applications such as Oracle Financials and SAP R/3.

Client Management Software v. 9.0 is limited in the areas of customer contact center, e-Business, knowledge management, supply chain management and employee relationship management.

Strengths:

Contact management
Account management
Sales management
Telemarketing/Telesales
Time management
Lead management
Business analytics
Customer service
De-duplication function
Customizable features
Configuration
Customization
Data Conversion

Weaknesses:

Limited customer contact center
Limited knowledge management
Limited e-Business
Limited supply chain management
Limited employee relationship management
Lack of interactive calendar

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Appendix

TOTAL NUMBER OF CUSTOMERS	**600+ companies**
LANGUAGES AVAILABLE	**English, Hebrew, Arabic, Czech, Turkish, Russian, Italian**
LIST OF RESELLERS	**Oncontact Software has Certified Business Partner resellers that market, sell, and implement CMS in over 30 countries in North America, South America, Europe, Asia, and Australia. A complete list of Certified Business Partners is available from Oncontact Software.**

Pricing:

Multi-User (per seat):

Less than 25	$1,295
25+:	$1,295
50+:	$995
100+:	$995