



Benefits of CRM Integrated into Your Environment



IBM's New eServer Line

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Agenda for Today's Meeting

- What is CRM and Engage?
- Benefits and Features of Engage CRM
- CRM Returns on Investment
- Keys to CRM Success
- Engage Quick Demo
- Open Discussions & Questions

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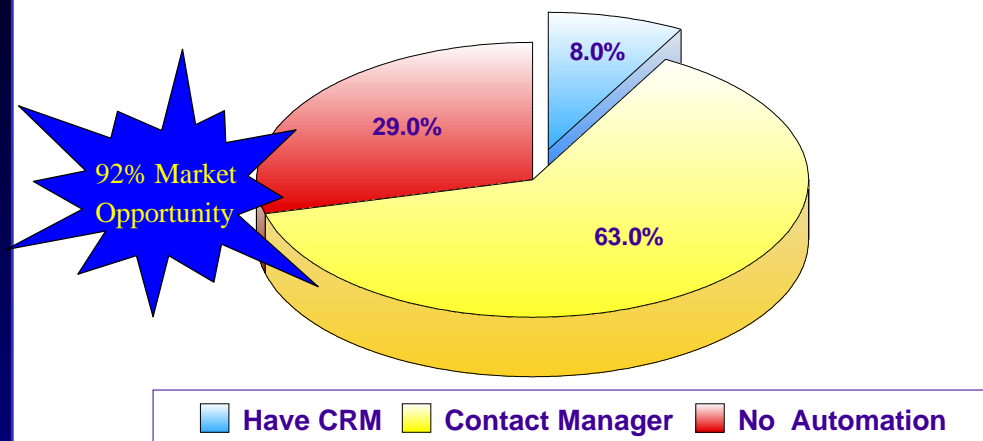
What is CRM?

Middle Market CRM Solutions...



The CRM Middle Market

Less than 8% have CRM yet 63% have only Personal Contact Management and 29% have no type of CRM Automation! - This is a Huge Opportunity!!





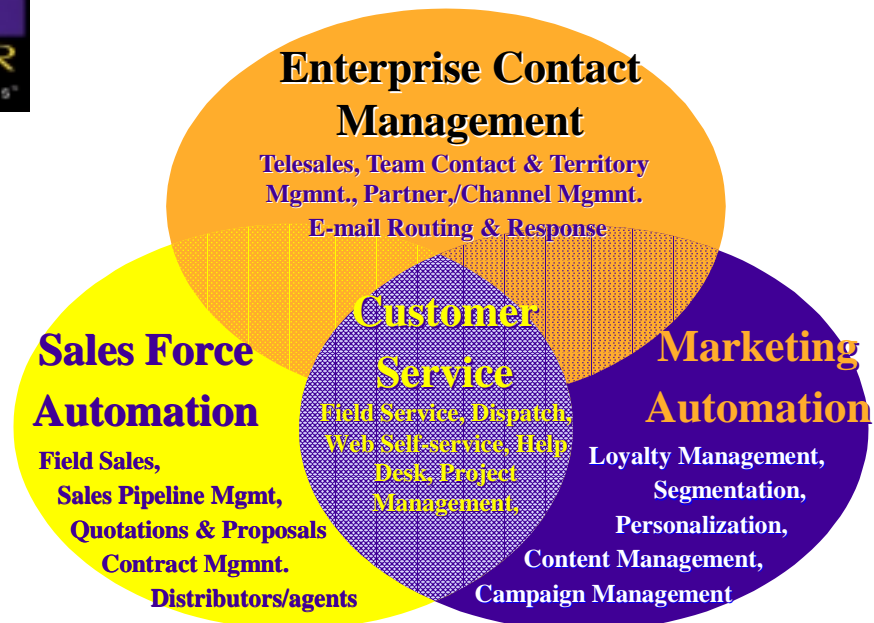
What is CRM?

- Covers all Customer touch points for a Company
 - ▲ Enterprise Contact Management
 - ▲ Marketing and Campaign Management
 - ▲ Enterprise Sales Force Automation
 - ▲ Customer Service, Help Desk, Self Service
- Gartner considers CRM to be the largest IT Growth Segment over the next 10 years
- Easiest of all Solutions to Cost Justify - Fast ROI

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What is CRM ?



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What is CRM?

- Enterprise Workgroup Contact Manager
 - ▲ Team based Workflow and Document Distribution
 - ▲ Supply Chain Partner Communications
 - ▲ Integration to all Customer Web Touch Points
- Enterprise Sales Force Automation
 - ▲ Powerful Quotation/Proposal System
 - ▲ Contract Management System
 - ▲ Products and Services Warehouse pricing System

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What is CRM?

- Enterprise Marketing and Communications System
 - ▲ Marketing Campaign Management
 - ▲ Powerful Broadcasting & Communication System
 - ▲ Marketing Encyclopedia, Presentations, Collateral
- Enterprise Service Billing and Project Tracking System
 - ▲ Time Billing Management
 - ▲ Project Billing Management
 - ▲ Help Desk and Incident Tracking

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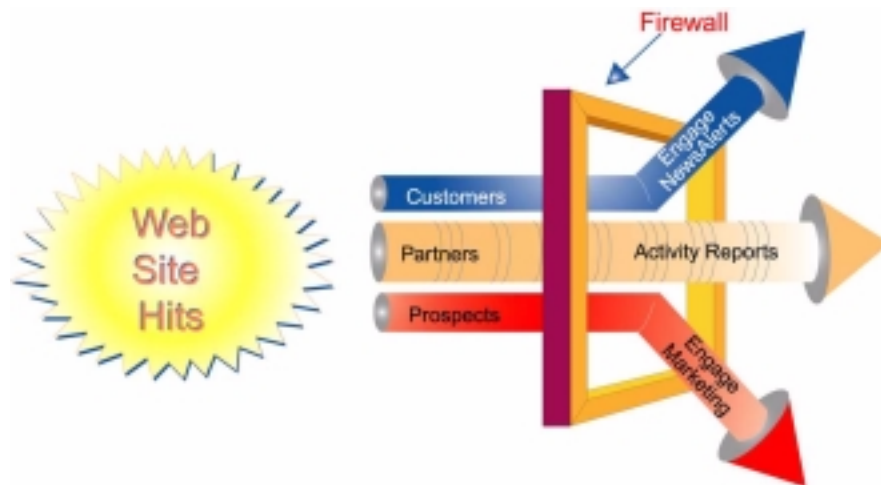
CRM leverages Teamwork across your Enterprise...



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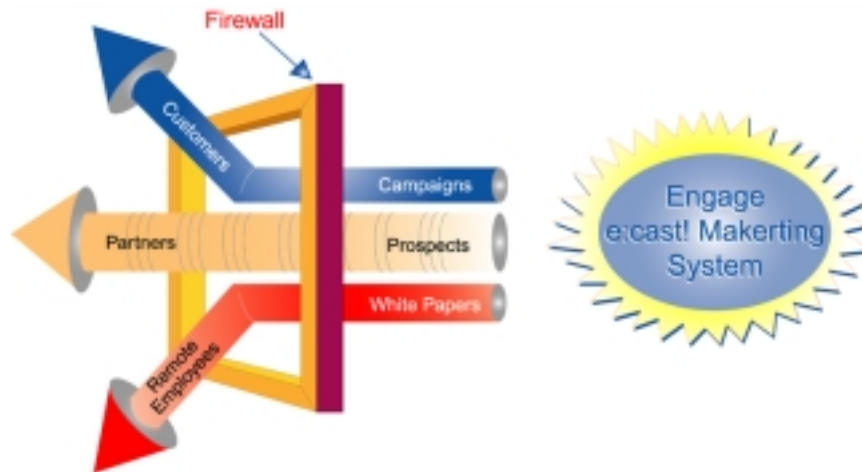
CRM Integrates to your Web site Activity...



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CRM Automates Marketing & Communications...



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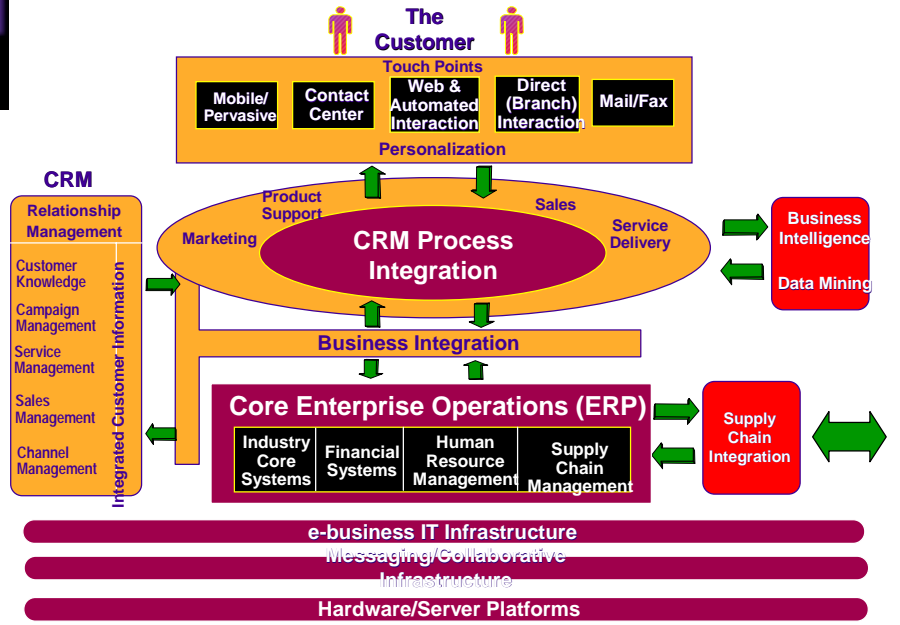
CRM Increases Sales, Marketing & Services Efficiency



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What is CRM?

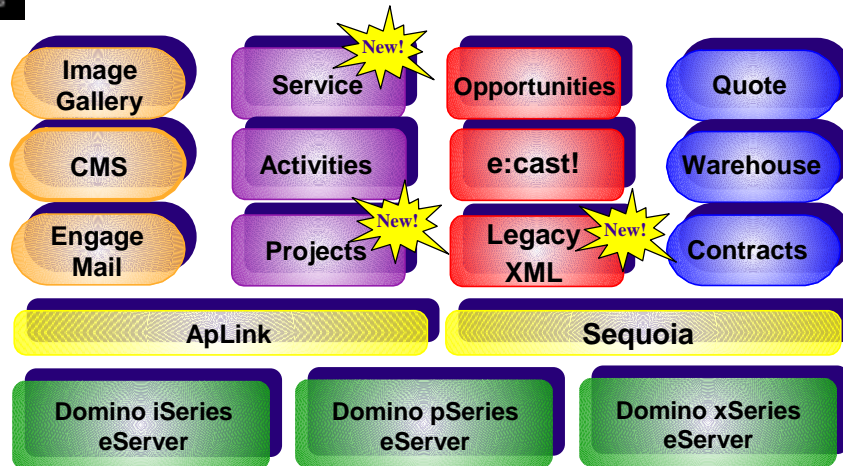


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What is Engage?

Engage is Modular and Flexible and fits IBM's new eServer Scaling Features



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What is Engage?

Engage can integrate to a broader range of Applications in your Company...



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Benefits and Features of CRM?

Middle Market CRM Solutions...

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Functional Overview of CRM Enterprise Contact Management

- Manage Customers at multiple locations
- Automatically Assign your Team to your accounts
- Follow Projects & Tasks to completion
- Track Team and Personal Tasks within your Calendar
- Campaign to Prospects or Customers about new products or Services
- Access Company Knowledge Base, Send Collateral
- Share information with your Supply Chain Partners

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Functional Overview of CRM Marketing Campaign Communications

- Define Marketing Campaigns w/ Targets and Demographics
- Tie-in Prospects or Customers to Corporate Marketing Activities
- Send to thousands of Customers on a scheduled or manual basis by e-mail, fax, and mail
- Send broadcast in Notes or HTML format complete w/pictures
- Update Opportunities Measure Marketing Campaign Results

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Functional Overview of CRM Sales Force Automation

- Track Leads and Opportunities
- Get Forecast and Pipeline numbers easily
- Create Quotes, Proposals and Contracts
- Flexible HTML and Rich Text Output
- Proposal & Quote Archiving System
- Tight Accurate Integration of Quotes to Forecasting
- Interface with ERP Configurators
- Link Mapics Item master, Order Entry to CRM

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Functional Overview of CRM Field Service Automation

- Flexible Project tracking and Reporting System
- Powerful Time Billing and Service Management
- Help Desk Automation
- Update Service Activities, Incident Tracking
- Tight Accurate Integration to Contracts and Quotes
- Integration to Mapics Billing System
- Integration to Service Calendar

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Why do Customers Like Engage?

General Reasons...

- Easier to Use, Easier to Implement
- Systems can be tailored to specific needs w/o Programming
- Low cost implementation, ongoing Maintenance
- Customer can Buy only those Systems that he needs
- Extremely Secure
- Customer can phase implementation based on Priorities
- Each Module can run on separate Server-very scalable

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Why do Customers Like Engage?

Specific Benefits...

- Can Greatly Improve the Accuracy of Forecasts
- Can Improve Sales Productivity by 20 - 40%
- Can Manage Team based Projects and Opportunities
- Can Track and Drive Marketing Campaigns
- Can Reduce Sales Administrative Overhead
- Can Communicate w/ Supply Chain Partners
- Can Integrate to All Web and e-business Customer Touch Points
- Can Integrate to existing ERP systems

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CRM Returns on Investment

Middle Market CRM Solutions...



CRM is changing the Business Model

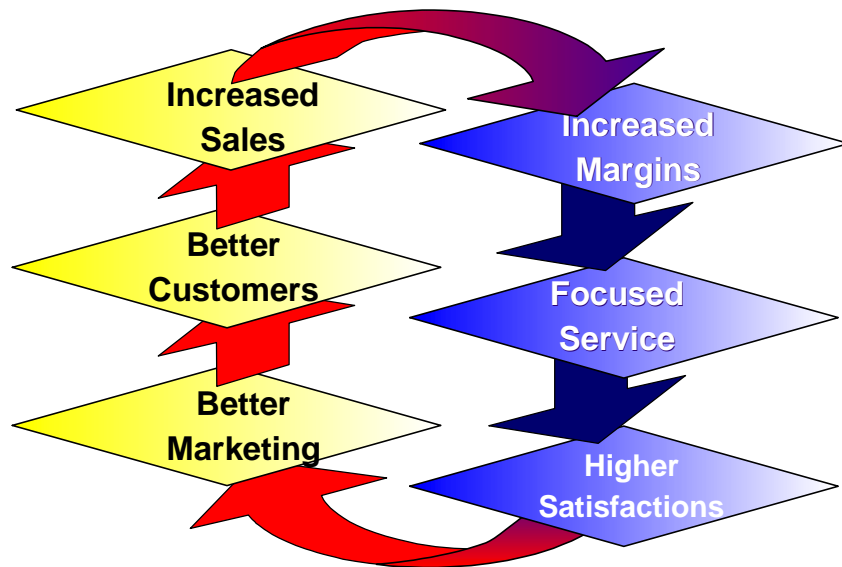
IDC CRM Study of 300 Large Corporations

	Before CRM	After CRM
Enterprise Vision	Short Term Product Focused	Long Term Customer- Focused
Organization	Hierarchical Structures	New Business Processes, new Organization, Quick to Adapt
Sales	Little Customer Knowledge, Face to Face selling	High Customer Knowledge, Mass-Customization, Multi Channel Selling, e-commerce
After Sales and Services	Reactive, Separtate processes Organization Slow to reacte to problems	Proactive, Integrated processes, High Responsiveness





Return on Investment Cycle



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Components of CRM ROI

- More Effective Marketing Tools & Methods
 - ▲ Broadband Communications to Prospects & Customers
 - ▲ More Refined Market Segmentation
 - ▲ More Accurate Measurements of Campaigns
- Increased Sales
 - ▲ Better Defined Sales Processes
 - ▲ More Efficient Productivity Tools
 - ▲ More Refined Customer Profiling

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Components of CRM ROI

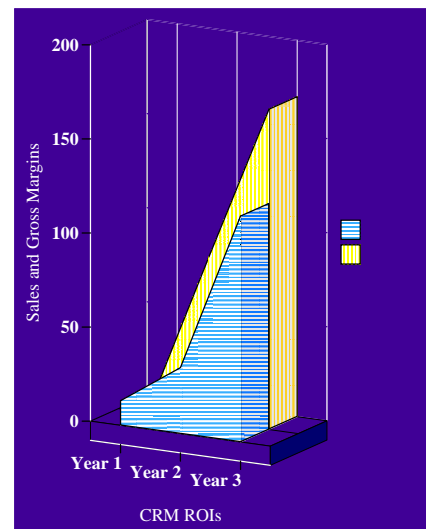
- Increased Margins
 - ▲ Better Value Approach to Customers
 - ▲ Better Margin Based Sales Tools
 - ▲ Right Types of Customers
- More Focused Customer Service Program
 - ▲ Better Customer Response to Problems
 - ▲ Increased Company Visibility to Customer Sat.
 - ▲ Better intra-Company and inter Supply Chain Communications

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What Sort of ROI Can You Expect?

- 20-40% Increase in Sales Productivity
- 15-30% Customer Satisfaction Gains
- 10-20% Gross Margin Increases
- 50% Overall Gain in Marketing effectiveness



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Customer Case Study #1

Engage Rapid Return on Investment...

- \$200 Million Company
- 200 Engage Users
- \$420,000 Investment w/ Options
- 4-6 Weeks to Productive Use
- Average Annual Sales Grow at 15% per Year
- a 20% Sales Productivity in First 12 Months
- Increased Revenue Growth by 3%
- 3% added \$6,000,000 in sales
- Assuming a 10% Gross Margin = \$600,000
- Investment Return of \$420,000 in 8.4 Months

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Customer Case Study #2

Pre-Project Analysis

- 600 Staff CPA Firm
- 200 Initial Engage Users
- \$210,000 Investment w/ Options w/o Hardware
- 4-6 Weeks to Productive Use
- Estimated over \$1.7 Million in Cost Savings Productivity Enhancements
 - ▲ \$600,000 in Operational Cost Savings
 - ▲ \$200,000 in Customer Retention
 - ▲ \$400,000 in Marketing Support Enhancements
 - ▲ \$500,000 in Productivity Gains

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Keys to CRM Success...



One of Top Reasons CRM Projects Fail...

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Top 3 Reason CRM Projects Fail

- Lack of Executive Support
- Poor Training and & Education Plan
- Improperly Configured Servers or Workstation Performance

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Example of Engage Full Service Offerings

- Software Maintenance, 1 or 3 year plans
- Custom On-site Education
- Education Pack
 - ▲ Multimedia Education CDs for each user
 - ▲ Interactive Web Education - Life of User of Engage
- Development Pack
 - ▲ Custom Views, Screens, Reports
 - ▲ New Features
- Help Line Support
 - ▲ Incident Based 10, 15, 20 Packs
- Engage Gold Pack

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5 Ways to Educate Engage Users

- On-line Help
- Class Training
- Web based Training
- Education CDs
- Custom On-site Training

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IBM/Engage Solutions Bundle

Properly Configured IBM eServers

- 5 Engage/Bundles AS/400 iServer Line
- 5 Engage Bundles Netfinity xServer Line
- 5 Engage Bundles RS/6000 pServer Line
- 25, 50, 100, 200, 400 User Configurations
- Priced 20 % under Standard Pricing
- Published, Easy to Use Solutions Quick Pricers
- Each Base Solution has 15 add-on Options
- All Bundles and Options have IGF Special Financing
- Designed to Pull Additional Engage/IBM Products

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The Engage Quick Demo

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The Engage User Experience...

ENGAGE ACTIONS Print Preview Close New Task New To-Do New Opportunity New Quote News Alert

CMS Directory

- Companies
- People
- Open Tasks
- Activity History
- Reports
- Favorites
- My Workspace

(+30) Business Integrators Inc. - Groupware Innovations [Chantaye Warner]
 (+61) Business Integrators Inc. - Houston [Chantaye Warner]

3130 Rogerdale Suite 100 Houston TX 77042 USA 713-973-8811 www.e-businessintegrators.co

Al Fuller (Sales Rep.)	713-973-8811	al.fuller@bin.com
Brad Hall (Sales Rep.)	713-973-8811	brad.hall@bin.com
Dan Fisk (Sales Rep.)	713-973-8811	dan.fisk@bin.com
John Nelson (Vice President)	713-425-4500 x516	john.nelson@bin.com
Jon Bryan (CEO)	713-973-8811 713-973-8881	jon.bryan@bin.com
Karen Hendrix (Sales Rep.)	713-973-8811	karen.hendrix@bin.com
Randy Lakner	713-425-4576	randy.lakner@bin.com
Robert E. Baugh (President)	713-425-4552 713-973-8881	rebaugh@bin.com
Todd Halbur (Sales Rep.)	713-973-8811	todd.halbur@bin.com

(+2) <Opportunity>
 (+29) [Account History]
 (+19) [Log]
 (+1) [Opportunity History]

(+5) Business Integrators Inc. - McAllen [Chantaye Warner]
 (+10) Business Integrators Inc. - San Antonio [Chantaye Warner]
 (+6) Business Integrators Inc. - Tyler [Chantaye Warner]
 (+4) BUSINESS INTEGRATORS INC

History Open Tasks Opportunities All Activity Contacts Go to document... Go to WebSite

Date	Contact	Opportunities	Account Manager
09/29/2000	Robert E. Baugh	New Engage Distributor	Chantaye Warner
09/29/2000	Brad Hall	New Book Order	Chantaye Warner
10/18/2000	Jon Bryan	Mapics MRP Sales	Chantaye Warner

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The Engage User Experience...

Workspace Engage CMS 99 - Companies\By Name notes

ENGAGE ACTIONS Print Preview Close New Task New To-Do New Opportunity New Quote News Alert

Navigator

- Mail & Calendaring
- CMS
- Opportunities
- Quote
- Contracts
- Warehouse
- Activity Archive
- Image Gallery
- e.cast!
- Jo!Pad
- Sequoia
- Other...

(+8) Business Integrators Inc. - AS/400 TSG [ENGAGE User]
 (+8) Business Integrators Inc. - Austin [Chantaye Warner]
 (+5) Business Integrators Inc. - Dallas [Chantaye Warner]
 (+30) Business Integrators Inc. - Groupware Innovations [Chantaye Warner]
 (+61) Business Integrators Inc. - Houston [Chantaye Warner]

3130 Rogerdale Suite 100 Houston TX 77042 USA 713-973-8811 www.e-businessintegrators.co

Al Fuller (Sales Rep.)	713-973-8811	al.fuller@bin.com
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Dan Fisk (Sales Rep.)	713-973-8811	dan.fisk@bin.com
John Nelson (Vice President)	713-425-4500 x516	john.nelson@bin.com
Jon Bryan (CEO)	713-973-8811 713-973-8881	jon.bryan@bin.com
Karen Hendrix (Sales Rep.)	713-973-8811	karen.hendrix@bin.com
Randy Lakner	713-425-4576	randy.lakner@bin.com
Robert E. Baugh (President)	713-425-4552 713-973-8881	rebaugh@bin.com
Todd Halbur (Sales Rep.)	713-973-8811	todd.halbur@bin.com

(+2) <Opportunity>
 Mapics MRP Sales (C. Warner)
 New Book Order (C. Warner)

(+29) [Account History]

left message [SUMMARY: left message for randy regarding possible engage opply at eoit energy partners in houston. gave him the contact's name and number and asked him to give them a call.] 10/02/2000 (A. Randolph) Randy Lakner

Im for Bob re-Sales Training. Claire and VAI. 09/28/2000 (C. Warner) Robert E. Baugh

trading voicemails with John to schedule the Sales Training. He was concerned that it was just an overview of Engage. [SUMMARY: I have explained that it is an important call to help the reps identify and qualify prospects. I asked him to call me] 08/17/2000 (C. Warner) Randy Lakner

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The Engage User Experience...

Workspace Greg Colley - Inbox Engage CMS 99 - Workspace\Open Tasks & To Dos notes

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CMS Directory

ACTIONS Print Close New Task New To-Do New Opportunity New Quote News Alert

Description	Contact	Company	Status	Due
Saturday, October 28, 2000				
(+1) Meeting				
(+1) MRP Meeting	Joe McNiff	Business Integrators Inc.	In Progress	10/28/2000 05:0
Thursday, October 26, 2000				
(+1) Phone Call (Out)				
Follow up Call (SUMMARY: fjdjd.fjasdkt.fjasdkt.fjaskl.djfk.klasdf)	Joe McNiff	Business Integrators Inc.	In Progress	10/26/2000 05:0
Wednesday, October 25, 2000				
(+1) Conference Call				
Call on Engage Demo and MRP integration (SUMMARY: bibibkajdk.fjaskl.fjkasd.fjkl.sdf(kl.sdfj)	Joe McNiff	Business Integrators Inc.	In Progress	10/25/2000 05:0
Friday, October 20, 2000				
(+1) Conference Call				
Sametime Demo w/ Engage	Joe McNiff	Business Integrators Inc.	In Progress	10/20/2000 05:0

My Workspace
Open Tasks
Closed Tasks
All Tasks
Calendar



The Engage User Experience...

Workspace Greg Colley - Inbox Engage CMS 99 - Workspace\Calendar notes

ENGAGE
CMS Directory

ACTIONS Print Close New Task New To-Do New Opportunity New Quote News Alert

October 2000

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday - Sunday
25	26	27	28	29	30
					1
2	3	4	5	6	7
					8
9	10	11	12	13	14
					15
16	17	18	19	20 05:00 PM Joe McNiff	21
					22
23	24	25 05:00 PM Joe McNiff	26 05:00 PM Joe McNiff	27	28 05:00 PM Joe McNiff
					29
30	31	1	2	3	4

My Workspace
Open Tasks
Closed Tasks
All Tasks
Calendar





Look at Company Information...

Workspace Engage CMS 99 - Companies\By Name Business Integrators Inc. - Houston

ACTIONS Print New Company New Person New Task New To-Do New Opportunity

COMPANY

Company Profile

Company	Business Integrators Inc.			Customer #	233551
Location	Houston	<input checked="" type="checkbox"/> Headquarters		Acct. Mgr.	Chantaye Warner/Clear
<input checked="" type="radio"/> Physical	3130 Rogerdale Suite 100			Region	Southwest
<input type="radio"/> Shipping				Industry	Distribution
<input type="radio"/> Billing				Primary Contacts Open	
City/State/Zip	Houston	TX	77042	Robert E. Baugh (President)	
Country	USA			John Nelson (Vice President)	
Telephone		A/C	Number	Randy Lakner	
Main Number		713	973-8811	Al Fuller (Sales Rep)	
Toll Free		800	249-5192	Categories <input checked="" type="radio"/> Business <input type="radio"/> Marketing	
Fax Line				Engage Distributor	
Web Site URL		www.e-businessintegrators.com			

[Contacts](#) [Comments](#) [Background](#) [Bus. Terms](#) [Data Bank](#) [Transactions](#) [Partners](#) [Acct. Team](#)

CLEAR_PC.GIF



Look at Company Information...

Workspace Engage CMS 99 - Companies\By Name Business Integrators Inc. - Houston

ACTIONS Print New Company New Person New Task New To-Do New Opportunity

COMPANY

Data Bank

Company	Business Integrators Inc. (Houston)	Page 2
Software Subscription		
Vendor Relationships		
Printers		
Lessors		
Exp Date		
Engage Survey Questions		
What CRM are you using today?		
How do you Forecast or Quote?		
Do you have a Notes Practice?		
Have you heard about Engage?		
Is their interest in Engage?		

[Contacts](#) [Comments](#) [Background](#) [Bus. Terms](#) [Data Bank](#) [Transactions](#) [Partners](#) [Acct. Team](#)

CLEAR_PC.GIF





Look at People and Relationships.

Workspace Engage CMS 99 - Companies\By Name Robert E. Baugh - Business Integrators Inc. X

ACTIONS Print New Company New Person New Task New To-Do New Opportunity

PERSON Person Profile

Prefix/First/Last	Robert E. Baugh	Telephone	A/C	Number	Ext.
Job Title	President	Work Phone	713	425-4552	
Company	Business Integrators Inc.	Home Phone			
Location	Houston <input type="checkbox"/> HQ	Work Fax	713	973-8881	
Functional Role		Mobile Phone	713	882-2193	
		Digital Pager			

Office Address	3130 Rogerdale Suite 100		
<input type="checkbox"/> Custom			
City/State/Zip	Houston TX	77042	
Country	USA		

E-Mail 1	rebaugh@bin.com
E-Mail 2	
E-Mail 3	
Preferred	rebaugh@bin.com

Primary Contact No Marketing

Company Comments Phones/E-Mail Background Data Bank Transactions Partners Acct. Team

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Look at People and Relationships.

Workspace Engage CMS 99 - Companies\By Name Robert E. Baugh - Business Integrators Inc. X

ACTIONS Print New Company New Person New Task New To-Do New Opportunity

PERSON Background

Person	Robert E. Baugh	Company	Business Integrators Inc. (Houston)
Home Town		Job Title	President
Date of Birth		Assistant	
Marital Status	Unsure	Supervisor	
Spouse		Years: At current position	With company
Children/Pets		Education	
Anniversary		<input checked="" type="radio"/> Unsure <input type="radio"/> College Degree	
Personal Interests		<input type="radio"/> High School <input type="radio"/> Masters Degree	
		<input type="radio"/> Some College <input type="radio"/> Doctorate Degree	
		Institution	
		Degree(s)	

Company Comments Phones/E-Mail Background Data Bank Transactions Partners Acct. Team

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Drill Down to the Opportunity or Project...

Workspace Engage CMS 99 - Companies\By Name Opportunity: Mapics MRP Sales

Print New Opportunity New Quote New Marketing New Task News Alert

OPPORTUNITY

Description: Mapics MRP Sales		Current Status: Open
Include in...		Account Mgr: Chantaye Warner/Clear
Company: Business Integrators Inc. (Houston)	Lead Source: Customer Follow-up [Direct Sales]	Originated: 09/29/2000 16 19 day(s)
Main Contact: Jon Bryan	Category:	Assigned: 09/29/2000 16 -19 day(s)
Phone/Fax: 713-973-8811 713-973-8881	Lead Quality: Hot Lead	Should Close: 16 0 day(s)
E-Mail: jon.bryan@bin.com	Probability: 25% Evaluating Solution	Last Activity: 09/29/2000 -19 day(s)
Functional Role:	Est. Revenue: \$500,000.00	
Industry: Distribution	Profit Margin: \$200,000.00	
Region: Southwest	Linked Quote: MRPII Quote	
Opportunity Quote Summary Acct. Team		Margin / Total: \$112,645.00 \$997,248.00

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Drill Down Further to the Quote...

Workspace Engage CMS 99 - Companies\By Name Engage Opportunity - Opportunities\By Company Quote: MRPII Quote A

Print Preview Deal Cost Worksheet New Quote New Quote Ver Create Contract(s) Open Calendar News Alert

QUOTE

Project: Mapics MRP Sales	Acct. Mgr: Chantaye Warner/Clear
Quote Title: MRPII Quote	Opportunity: Mapics MRP Sales
Version: A	Update? <input checked="" type="checkbox"/> Update Opportunity?
Status: Draft	Company: Business Integrators Inc. (Houston)
Total Amount: \$997,248.00	Contact: Jon Bryan
Close Date: 10/10/2000	Address: 3130 Rogerdale Suite 100
Comments:	City: Houston
	State / ZIP: TX 77042
	Country: USA

Summary Quote Builder Layouts Adjustments Acct. Team

Attachments

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Look at line item details in a Quote...

Workspace Engage CMS 99 - Companies\By Name Engage Opportunity - Opportunities\By Company Quote: MRPII Quote A

Print Preview Deal Cost WorkSheet Copy from Configurator New Quote New Quote Ver Create Contract(s) Open

QUOTE Add Items Copy From Move Items Remove Add Blanks Remove Blanks

Section AS/400 MRP Section New Arrange Remove Show Items 1 - 8

#	Qty.	Model Number	Description	Cost	Price	Extended
1	1	9406-720	AS400e Server		\$27,000.00	\$27,000.00
2	1	0023	3490-E01/F0x Lcl Src Strnd Alone		\$0.00	\$0.00
3	1	0044	Device Parity Protection (RAID)		\$0.00	\$0.00
4	1	0203	Side by Side Install		\$0.00	\$0.00
5	1	0348	PCI Cable - V.24/EIA232 20-Ft		\$125.00	\$125.00
6	1	0367	Operations Console PCI Cable		\$125.00	\$125.00
7	1	0381	Remote Control Panel Cable		\$125.00	\$125.00
8	1	1501	Interactive Card (70 CPW)		\$28,000.00	\$28,000.00

Delivery Date 09/29/2000 Options for this section Sub Total \$96,020.00
 Quote Total \$997,248.00 Contract Hardware Contract Adjustment %/\$ 0
 Summary Quote Builder Layouts Adjustments Acct. Team **Total** \$96,020.00



Look at Marketing Activities...

Workspace Engage CMS 99 - Companies\By Name Log

Print Close

LOG

Company	Business Integrators Inc.	
Location	Houston	
Name	Mr. Randy	Lakner
Job Title	4Q Engage Mktg. Update - Dist. / Engage Marketing Campaigns	
Time Stamp	10/13/2000 04:34:49 AM	
Log Type	e:cast!	
Message	Recipient was sent transmission on 10/13/00 4:34:49 AM for transmission 4Q Engage Mktg. Update - Dist. Address: randy.lakner@biin.com	



The Engage CMS Interface

The screenshot displays the Engage CMS interface. At the top, there is a navigation bar with icons for Print, Preview, Close, New Task, New To-Do, New Opportunity, New Quote, and News Alert. Below this is a sidebar with a 'CMS Directory' search box and a list of navigation options: Companies, People, Open Tasks, Activity History, Reports, Favorites, and My Workspace. The main content area shows a list of business integrators, including 'Business Integrators Inc. - Groupware Innovations [Chantaye Warner]' and 'Business Integrators Inc. - Houston [Chantaye Warner]'. Each entry includes a star icon, a count in parentheses, and a list of contact details such as name, title, phone number, and email address. A table at the bottom of the interface shows a history of activities with columns for Date, Contact, Opportunities, and Account Manager.

Date	Contact	Opportunities	Account Manager
09/29/2000	Robert E. Baugh	New Engage Distributor	Chantaye Warner
09/29/2000	Brad Hall	New Book Order	Chantaye Warner
10/18/2000	Jon Bryan	Mapics MRP Sales	Chantaye Warner

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Discussion and Questions

For a Live Engage Internet Demo
Call Clear Technologies
at 888-339-4244

