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Business Automation Series 3rd in Series

by

Tom Daly & David Brydson



Two Methods for Implementing Business Automation

We refer back to the last article in the series (The GoldMine Advisor - October 2008), Business Processes and Business Automation, where you have agreed with your client on the terminology you will use and the business conditions which will determine program branching. You also started using the Zachman Model at the Planner and Owner levels to ensure that any business automation you develop is established within the context of the client's business.

Method One – Zachman Model

Continuing with the Zachman Model, there are three more levels to work through – Designer, Builder, and Sub-Contractor – before you reach a working solution.

Designer Tasks | This level is still pre-technology, with no decisions made regarding the technology to use. At this point you must begin to use the terminology you have established with your client to describe in great detail what events must occur. Conceptually, you must work through the flow of the client's business, insuring that starting points, processes, business rules, and end points are fully understood. Until this is done, consciously recognized, and documented; discussion of technical means is premature. You will know What needs to be done, How it must be done, Where it will occur, Who will do it, When it will be done, and Why it must be done. Now to consider the tools . . .

Builder Tasks | With a comprehensive picture of the client's requirements, a study of available software and hardware to meet these requirements must be done. Because you understand the client's needs so well, you can likely forecast changes in the client's requirements over some period of time. At this level, you must consider architectural issues, such as: data structure, data storage, server locations, input and output information (and who is responsible for each), communication means (intra-, inter-, and ex-network), and the kinds of software that can model the client's business processes and deliverables. The next level may evolve differently than expected at this point, necessitating more or different capability. It is important to allow room for growth and change when scoping the architecture.



Sub-Contractor Tasks | The term 'Sub-Contractor,' coined by Zachman, doesn't quite describe what happens here. You may sub-contract this work, or you may perform it yourself, but in either case this is where the value of all the preceding work is confirmed. Using the structure created during the Builder Tasks, specific choices are made which change it from a promise into reality. This is where the Designer Task output is married to technology via business rules emulated in firmware, the choices made in software setup, the data initially entered, screen layouts, report designs, user training, system testing,

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Editor: **DJ Hunt**

Although I try to edit these articles for content and accuracy, I cannot always guarantee their content is 100% accurate. Should you use anything information contained in this newsletter, you do so at your own risk. All information contained herein is not intended as specific advice, but as a general point of discussion. Should you find an error, it would be nice if you e-mailed me so that I may print the exception in the next issue of this newsletter.

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All questions, and future articles should be submitted to:

DJ@DJHunt.US

If you are including screenshots, they should be no wider than 3.57" US. Their print resolution should be 300 dpi, and they should be in a png format or jpg format.

Major contributors are also asked to submit a 1" US wide portrait photo. The print resolution should be 300 dpi, and the format should also be in a png or jpg format.

We accept all articles, however, the editor reserves the right to determine which articles are included, and into which issues they are to be included.

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and final verification of a working system. When done properly, the result is a precisely designed engine to drive the client's business to efficiency, effectiveness, and profitability. It is custom fit to the client's business.

Method Two – Best-in-Class

Looking at it one way, this is a somewhat more reassuring route. After all, if others have used this method and done well, then it should be OK. Right? Well, maybe. The other aspect is that it isn't precisely designed for your client's business. You know absolutely, that it has worked for some company, perhaps one very similar to your client's. But each company has its own flavor, and will do some things differently. There are some ways to accommodate the differences.

Best in Class Model | The basic concept is to begin with a business model that has proven to be Best-in-Class, and modify the model to suit the unique differences of the client's company. The software must be capable of significant modification in order to accommodate such adaptation.

The GoldMine Example | To a great extent, GoldMine is your custom design example. It arrives very much as a clean slate, with many possibilities, but not set up to do any particular thing. The dealer works with the client to mold it around the client's business (Method One). There are many companies which have GoldMine and like the custom aspects. The Best-in-Class example we are about to show you began in a form very much like GoldMine. Even today, it has thousands of settings which can be changed to wrap it around a business, yet many clients objected to all the work to set it up from a clean slate condition.

Capturing Best-in-Class | Our example is based on BestFit Business MGR, which creates a bridge between GoldMine CE and an office back end like QuickBooks, incorporating many business processes found only in multiple add-ons and few not seen before. Working from the premise that companies would rather purchase software that works 'Out of the Box,' BestFit went back to the drawing board to see if they could deliver this very customizable software in that state. The result is software that can be delivered in a working condition, needing only a few things like: company logo, address, location of GoldMine, location of Outlook, and a few more things of like nature. You get the picture.



What kind of businesses? Well, a service business, a product sales business, a manufacturer's business, and a dealer's business - to start. The company has captured all of the settings inherent in each of these businesses, and can deliver the software with those settings already pre-set.

Customizing Best-in-Class | BestFit Business MGR lost none of the thousands of configuration settings which can be changed to suit the different nature of a business; it just reduced the workload tremendously to implement the software. It also reduces the install time.

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Next Steps

Whether you decide to use Method One or Method Two, the results should be tracked for some time until the new software issues shake out. Initial adjustments usually come fast and furiously, only to taper later. There are lessons learned from new software installations which hint at the next project or sub-project the client might want to consider. We encourage you to continue your investigation into business processes and methodologies, for your clients' sake.

CRM Integration Projects Part II

Managing Costs, Increasing Revenues

by

David Evans (Happy to be Contacted)

How can we control project risk?

Lessons from the world of software development

The world of software development has been through a brutal learning curve on managing projects. No one (least of all InaPlex) would contend that software development is perfect, but there are some lessons that can be transferred to the wider world.

The prevailing model for projects for many years was the Waterfall Model. With this, projects were divided into the following stages, with each stage done in order:

- o Specification – document everything
- o Architecture – design the solution
- o Implementation – code the solution
- o Test and deliver

The problems with this approach were (and are) manifold. The two most important are:

- o Projects suffered from “paralysis by analysis”, as the specification tried to cover all possible issues
- o The end user did not see anything until the whole project was delivered – only then were they able to say “I said X, but meant Y”

The end result was rigidly designed, over engineered projects that did not deliver what the user required.

The modern approach is Iteration. The driving model here is short project cycles with high customer involvement:

- o Specify a small objective
- o Implement – test – deploy
- o Get user feed back
- o Do it all again

There are some important features of this process:

- o Specifications are *expected* to evolve
- o Early and continuous user involvement

However, the process does have one important characteristic:

- o It relies on tools that support the process.

Managing the risk

Implementing the Iteration model for project management provides a number of ways to reduce project risk, primarily because it addresses the issues involved in project specification.

Integration projects are very susceptible to specification problems and particularly scope creep, because the issues involved in the data and the underlying business processes are often poorly understood until an integration project exposes them.

Using an Iteration model, the implementer:

1. Picks a small and relatively well understood feature or data set
2. Builds the integration *just* for this feature
3. Demonstrates to the user in the CRM environment
4. Gets feedback about this feature and what impact it has on the next feature to implement.

Inaport

Inaport is a product specifically designed to handle large scale integration projects for GoldMine and a range of other CRM systems. It provides:

- o A single User Interface for handling all types of integration project
- o Many features designed specifically for the challenge of handling CRM style data
- o Complex and powerful matching capabilities for handling poor quality, duplicate data

In particular, it provides excellent support for the iteration model. Because it is very rapid to develop a sample integration, it becomes possible to perform “what-if” scenarios – very rapidly import a data set, have a look at it in the CRM environment, then decide how it needs to be changed and enhanced.

Developing Revenue

Once a partner has a controlled methodology for integration projects, they are able to demonstrate that methodology to prospective customers.

Nearly all CRM implementations will benefit from merging data from other data repositories in the organization, but many (most?) end users are either

1. not able to appreciate what can be done to enhance their systems, or
2. have seen or even attempted integration projects, and seen it go horribly wrong.

Not unfairly, they are scared of tackling such a project themselves.

Times are tough – budgets are shrinking.

A partner that can address their existing end user base and demonstrate how to add value to existing investments, in a controlled, secure manner is in a far better position to improve their own bottom line.

IntelliClick

by

Pamela Pearl



IntelliClick® - The First E-Mail Marketing And Web Navigation Tracking Tool Designed For Goldmine Users.

In this age of instant Internet access to product and service information, our customers are armed with substantial competitive data, even before a sales rep learns their name! How can your company stay on top of the sales and marketing process and be competitive in this era?

One way is to track customer digital body language. In other words, find ways to capture prospect and customer interests & behaviors before the sales team contacts them. This way,

the sales team can immediately “key in” to what the customer is looking for and “unlock” the potential before someone else does. The marketing team can hone-in on that important digital body language to prepare targeted e-mail campaigns, or other forms of promotional initiatives.

For those looking for a smart, streamlined way to accomplish this task, IntelliClick software does the job. Web services technology and a user friendly wizard interface combine to track e-mail marketing & web site navigation. The IntelliClick solution engages the sales group from the outset, and provides the marketing team with actionable data.

The IntelliClick **eClick** module is used to create specially coded hyperlinks which trigger the tracking and capture data directly back to GoldMine. This includes dynamic e-mail messaging, landing pages, literature fulfillment, and designated recipient notifications (i.e. alarmed phone calls, text messages and e-mails).

The IntelliClick **WebNav** module allows customers to setup their web site to have subsequent page views track once they have been accessed from an “IntelliClick” e-mail hyperlink. Subsequent visits are tracked back to GoldMine even if customers access the web site directly from a web browser. The IntelliClick WebNav user sets how long this tracking remains in effect for any given campaign.

Alert notifications further engage the sales group by sending campaign and hyperlink specific messages. Alerts recipients

(Continued on Page 5)

IntelliClick® At-A-Glance “Intelligent” E-Mail & Web Site Navigation Tracking That Takes Action

STEP 1:
Create Email Message Template -
Insert IntelliClick Wizard Created Hyperlinks



STEP 2:
Send E-Mail Campaign To
Target Audience



OUTCOME 1: Click Tracking
Web Pages Accessed From
IntelliClick Hyperlinks Within
E-mail Message

OUTCOME 2: Data Sent To CRM

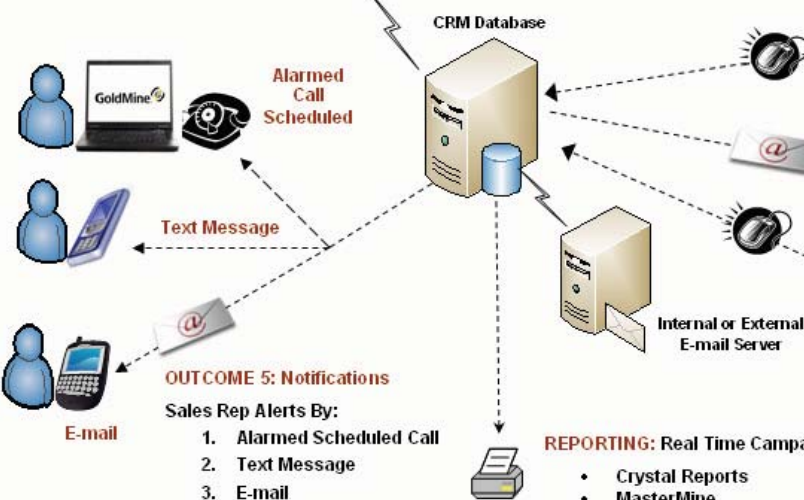
- Click Through
- Open
- Unsubscribe
- Event Registration
- Literature Request

OUTCOME 3: Automated Response

- Literature Fulfillment E-mail
- Event Confirmation E-mail

OUTCOME 4: Web Site Navigation Tracking

- Subsequent page visits
- Subsequent hyperlinks accessed



(Continued from Page 4 - IntelliClick)

can be static or dynamic. Dynamic recipient alerts are possible if custom fields are set in GoldMine to hold the sales rep contact information for each of their assigned accounts. These notifications are set by the user through the hyperlink wizard.

Notifications can be generated to one or multiple recipients and sent as:

1. E-mail messages
2. Scheduled alarmed phone calls
3. Text messaging

From a customer's perspective, there are just 2 steps to make this happen:

1. Users prepare an HTML e-mail template in the Document Management Center in GoldMine. This can be prepared from any desired HTML editor (i.e. FrontPage) and then pasted into GoldMine. The IntelliClick wizard is accessed (usually as a shortcut on a taskbar in GoldMine) and the generated hyperlinks are inserted into these templates.
2. The e-mail template is merged to the desired filter or group and sent to the target audience. Messages can be sent using any SMTP mail server preferred by the IntelliClick customer. IntelliClick does not send the mail.

Note: a special mail merge engine is planned for a future release that will provide additional process capabilities such as flow control to allow smaller increments of messages to be sent at user specified time intervals

Once messages are received by the target audience, IntelliClick takes over and begins the tracking process:

Message open, hyperlink clicks, unsubscribe and subsequent web page visits are logged to GoldMine. An entry to the CLICKTRAK tab (extended detail) and HISTORY are captured. Users have the option to suppress History for any type of tracking if their preference is to limit data to the Details (CLICKTRAK) area only.

Unsubscribe clicks can flag updates to GoldMine 4 specific ways:

- i. Entry to the CLICKTRAK tab
- ii. Entry to HISTORY
- iii. Add the word "Unsubscribe" to the Notes area of the actual e-mail address
- iv. Flag a database field with a designated value (set by the user in the wizard)

The IntelliClick Wizard can also be used to track more advanced "one click" hyperlinks, such as Event Registration or Literature Request / Fulfillment:

- The Event Registration hyperlink automatically schedules the registrant to the GoldMine calendar (to a user called EVENTS); The registrant is directed to a customized landing page that confirms their registration; A confirmation e-mail message, defined by the user through the wizard, is generated and sent to the registrant; The Details (CLICKTRAK) tab is updated with this event click captured.
- The Literature Fulfillment hyperlink will automatically process an e-mail message with a file attachment, all defined by the user through the wizard; this message is unique to each hyperlink and dynamically creates both the content and file attachment using files located on the client's own network. The sent e-mail is noted in History and Details (CLICKTRAK).

The IntelliClick WebNav option provides an additional capability to track web site navigation behavior once a recipient clicks on an IntelliClick e-mail hyperlink. Customers can assign their web pages to be tracked from e-mail campaigns. Each page view is logged to the Details (CLICKTRAK) and History in GoldMine, identifying who, when and which page(s) are viewed. This compliments the initial intelligence being gathered by the e-mail hyperlink tracking by providing a more complete picture of the e-mail recipient interests & behaviors.

IntelliClick includes preset Crystal reporting that can be accessed directly within GoldMine. Detail and Summary level

(Continued on Page 6)

D. Campaigns	Click Date/Time	Click By	Type (Enter for URL)
1... Introductory Webinar	12/13/2008 7:06:54 PM	Mark Jones	Message Opened
1... Introductory Webinar	12/13/2008 7:09:39 PM	John Smith	Click Tracked
1... Introductory Webinar	12/13/2008 7:11:57 PM	John Smith	Message Opened
1... Introductory Webinar	12/13/2008 7:14:00 PM	John Smith	WebNav
1... Introductory Webinar	12/14/2008 7:31:39 AM	Mark Jones	WebNav
1... Introductory Webinar	12/14/2008 7:44:32 AM	Mark Jones	WebNav
1... Introductory Webinar	12/14/2008 7:44:37 AM	John Smith	Literature FulFilled - Brochure
1... Introductory Webinar	12/15/2008 1:08:27 PM	John Smith	Event: Webinar Registration
1... Introductory Webinar	12/17/2008 7:00:41 AM	John Smith	WebNav

(Continued from Page 5 - IntelliClick)

reporting, with graphical views for each campaign, can be accessed for any given user defined timeframe. In addition, users of MasterMine® for GoldMine can use a special toolkit which provides further analytics specific to the IntelliClick data captured in GoldMine.

IntelliClick® is offered as a Hosted or Premise Installed version. Capabilities are identical for both with the only difference being where the initial tracking is handled. The Hosted option has hyperlinks tracked through the IntelliClick web server and then this information is passed via web services to the client's GoldMine system. Two software components are installed; the web service client on the GoldMine server and the hyperlink wizard accessed by the users from a shared network directory. The premise installed option works the same way except everything is processed on the client's own web server and includes an SQL database for the initial tracking.

This version has unlimited clicks or web page views tracked while the hosted version has a click track pool that is used when recipients click on the e-mail hyperlinks or tracked web pages.

IntelliClick® is compatible with GoldMine Corporate and Premium Edition. A free trial of the product is available at <http://www.intelliclicksoftware.com/Evaluation>

Opportunity Knocks

by



David Petonic

Years ago I'd developed a nifty little add-on called Gold Order 100. Ever heard of such a thing? Didn't think so. It lasted about as long as snowy footprints tracked inside a toasty house in mid-winter Cleveland. Of course I did have that one sale, initially. Yet the springtime bloom of frantically placed orders for this software gem never materialized. The drought of sales made for a long, hot summer, and finally autumn drew down the curtain on Gold Order 100 with resounding finality. I refunded the solitary yet brave customer for his bold purchase, and contemplated becoming a weatherman.

Such is the life of a software developer. A few hits, an avalanche of misses. I used GO-100 for my business, however. The idea was to track cash flow of a small business, such as my sole proprietorship, completely within our favorite CRM system. That was the reason for the number at the end of the package name (as in 100%). For a dozen years, from 1994 through 2005, all income and expense records for my one-man shop were nestled cozily within the flexible data structure of GoldMine for Windows, version 3.

I had to upgrade, if for no other reason than to hush my snickering neighbors at "that stuck-in-the-90s guy in #324 from whom small dogs flee". Or is that flea? Anyway I purchased GoldMine 6.7 dBase in the summer of 2005 and set about the task of adapting the idea of GO-100 to it. In GO-100, Main Contacts, Details and History were utilized to keep everything relevant and related. GoldMine for Windows had no Opportunity Manager, but GM 6.7 does. Hmm. Let's have a look at that.

The Opportunity Manager in GoldMine affords you a true Parent-Child-Grandchild hierarchy. Same for the Service Manager in GoldMine Premium Edition. There are other methods of presenting GoldMine data in 3 linked tiers (or more), but they tend to be virtual and specialized. Examples are Organization Charts and Contact Groups. I wanted a 3-tier link structure that was foundational and direct, whereby: Main Contact is the parent. Main Opportunities linked to that Contact are children, as many as you require. From each child, any number of grandchildren can be created within Opportunity Tabs.

I needed custom data entry screens, of course, and GoldBox Views provided that capability for Inventory, Income and Expense screens. And it all works! If I need to add an expense for mileage, I go into GoldMine and highlight the EXPENSES Main Contact. At the Oppty Tab are the master expense records, one for each year. I highlight this year's record, click the icon to open the GoldBox View, and up come all of my individual expense entries. Add, Edit or Delete one or more, click the Post button and I'm done. Everything is written back to GoldMine and is fully sync-aware.

A 3-tiered linking structure exists within GoldMine for whatever you require, inside the Opportunity Manager. You can use the existing screens for the Main Opportunity and its Tabs, or, you can design your own. I suggest checking out the GoldBox Views page at www.RedstoneSoftbase.com for examples of creative screen design.

Well, my development work is now totally done. No, wait! Now I just need to design a system that causes me, and you, to create many more Income entries than Expense entries.

Did You Know

reprint from

FrontRange Solutions



Selling, marketing and servicing customers in a robust, vibrant economy is difficult enough, but growing revenue, improving marketing results and attaining high customer service levels in today's challenging economy can be especially difficult.

Did you know these selling trends and facts?

- Sales Cycle is Longer: 22% longer when compared to 2001.
- More People Involved: Average of 3.5 more people involved in enterprise decisions
- Solutions Focus: 79% of marketing campaigns are solutions based.
- Face to Face Calls: Average sales rep spends only 21% of their time face to face with prospects and customers.
- Sales Readiness: 44% have implemented sales readiness with responsibilities that include lead management.

Source: Sirius Decisions, B2B Advances in Lead Management

- Number of calls required to close a deal - Increased
- More decision makers/stakeholders meant more sales calls
- Length of the sell cycle - Increased

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(Continued from Page 6 - Did You Know)

A decision by the committee to hold off buying anything altogether meant an increase in no decisions.

Source: Successful Selling in Turbulent Times, CSO Insights

Did you know these marketing trends and facts?

Solutions Focus: 79% of marketing campaigns are solutions based.

Measurement: Marketing "sourced" impact to the sales pipeline is viewed as the most effective measurement of marketing today.

Sales Readiness: 44% have implemented sales readiness with responsibilities that include lead management.

Measurement: Marketing "sourced" impact to the sales pipeline is viewed as the most effective measurement of marketing today.

Best practice companies achieve 61% greater return on investment with marketing efforts as a result of advanced infrastructure and process.

Source: Sirius Decisions, B2B Advances in Lead Management

Did you know these customer service trends and facts?

92% of consumers base their image of an organization on experience using the call center

Source: The Center for Customer Driven Quality: Purdue University

A recent study shows that if a contact center exceeds a customer's expectations, nearly every caller (95%) will use the company's product or service again.

Only 16% of contact center experiences get rated as exceeding a customer's expectations.

One 'bad experience' encourages 63% of callers to stop giving their business to a company altogether.

Did you know a CRM solution can help you manage these facts and trends to grow revenue, improve marketing results and attain better customer service in today's challenging economy?

Centralize client information to formulate better selling, marketing and customer service decisions

Sell better and grow revenue in today's economy through proven sales methodologies

Retain customers at a higher rate, and improve customer loyalty with a Voice enabled CRM system

Market effectively through all client communication channels

Analyze lead information for improved marketing dollar spend

Rank, Route and Score lead information for faster response times and well qualified opportunities

Respond to problems, inquiries and questions in a timely fashion for improved customer satisfaction

Cross-sell / Up-sell products and services to gain additional wallet share

Report & Analyze your entire sales, marketing and customer service data for improved business decisions and managed costs

Tips, Tricks & Things

When to Use Filters, Groups and SQL Queries

by

Gene Marks



Filters, Groups, and SQL Queries are ways of segmenting the database to pull specific records. Here is a 'cheat sheet' on which one to use to get the data you need:

On What: Where is the data you want located in the record? Filters, Groups and SQL Queries each have different criteria on where you can select data from.

Static vs. Dynamic: Whenever Filters or SQL Queries are executed, they return the entire database in its current form and incarnation. Groups exist as a static record of the database at the time the group was built.

Speed: Groups are the fastest. Filters and SQL Queries can be slower to access because they have to scan the entire database every time they are run. Groups will be faster because they are prebuilt.

Difficulty: Filters are the easiest as they provide the least number of options. As options increase, so does the difficulty.

Setting Standards for Good GoldMine Data Hygiene

by

Gene Marks



There's nothing worse than preparing to run a batch of letters, emails, labels or a filter and realizing the data just isn't 'good' or 'clean' enough to get a good list.

Here are some ways to help combat that problem:

Use the Required Data Entry checkbox under a field's security properties (CTRL and Double Click on Field Label) to force users to enter data in a field like contact, address, city, state, zip, or contact type.

Standardize your lookup entries for fields like contact type, and use the field's lookup list Setup to force valid input, i.e. to pick something on the list.

Develop a set of data standards for users. These should spell out which fields should be filled in as well as formatting, e.g. IBM or GM rather than I.B.M. or General Motors, etc.

Also, have a look at these earlier entries in our blog to help you set and keep a New Year's resolution of consistent data entry:

<http://marksgroup.blogspot.com/2008/08/goldmine-user-says-ive-customized-my.html>

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(Continued from Page 7 - Setting Standards for Good GoldMine Data...)

<http://marksgroup.blogspot.com/2008/08/goldmine-custom-er-asks-how-can-i.html>

<http://marksgroup.blogspot.com/2008/09/goldmine-custom-er-says-but-thats-proper.html>

<http://marksgroup.blogspot.com/2008/09/goldmine-custom-er-says-but-thats-proper.html>

<http://marksgroup.blogspot.com/2008/10/goldmine-user-asks-how-to-use-dear.html>

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