



# *First View*<sup>TM</sup>

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This is our final edition of *First View* in 2002. The response to our newsletter continues to be extremely positive. This issue is not only informative, but could be extremely valuable to your company.

Once again, there's more news about First Choice Software than we have room in the newsletter! This issue of *First View* focuses on two major recent events: *Connections 2002* (our annual user group) and our revolutionary **EVERYTHING FOR FREE** lease program.

*Connections 2002* was a major success - and a lot of fun. This issue of *First View* highlights many of the details of the event.

First Choice announced the exciting new **Everything For Free** lease program three weeks ago. This program has rocked the Clarify world because it allows any Clarify customer to receive **every First Choice Software product for free** when they sign up for a three-year lease, at a minimal maintenance fee. Could your company use a **full-featured thin client for Clarify for free**? For more details, read on!

Of course, we wouldn't be First Choice Software if we didn't continue to write and ship new products, updates to existing applications, and enhancements for Clarify.

This issue of *First View* discusses:

- [Information about the Everything For Free lease program](#)
  - Details of the offer
  - Included products
  - Questions & Answers
  - Links to more information
- [A recap of Connections 2002](#)
- [Information about recently available and upcoming products](#)
  - [fcQuality, our new thin client for ClearQuality](#)
  - [Multi-lingual support for fcClients](#)
  - [Mail-Merge Utility for Clarify](#)
  - [Clarify Data Population Tool](#)
  - [Upcoming thin client for ClearLogistics Spares Manager and Order Ops](#)
- [New First Choice Professional Services Offerings](#)
- [An ideas column about evolving First Choice tools](#)
- [Employee Profile: Jeanne Sirkin](#)
- [The "Technical Corner" article with a customization for delaying business rules](#)

If you know of someone who might enjoy a copy of *First View*, please share it with them. Also, have them send

## **Everything For Free**

It may sound too good to be true, but it's not!!

Would you like to have an agent-facing thin client for your employees to use on the road, at home, or anywhere else? How about a customer-facing thin client that supports any language, so your customers can see your support website in their native language?

What if these came with FREE concurrent user licenses? Do you need a fast purge/archive utility? Or a contact/site de-duping tool? Or other workflow, administration, and developer utilities?

**For a limited time**, you can get it all – over 50 of First Choice's popular Clarify add-on applications – with no license fee!!

To qualify for **EFF**, you only have to do two things:

1. Sign our new, simple lease, and
2. Pay the annual maintenance fee of \$33,000

That's it. It is that simple, and that good of an offer.

Customers have routinely paid \$20,000-\$100,000 (or more) to license **each** First Choice application. This program that enables customers to get **every** First Choice application for only \$33,000 will last until the end of the year.

Virtually every First Choice product works with **ALL** Clarify versions, supported databases, and operating systems. Most of the applications, including the thin clients, are internationalized and localized.

There is no additional charge for development, test, and training servers. Multiple production server discounts are available, as are site and enterprise leases. Longer-term leases are available upon request.

Join the over 150 customers who have already inquired about this offer by visiting our website at [www.fchoice.com](http://www.fchoice.com) or by emailing us at [sales@fchoice.com](mailto:sales@fchoice.com).

## **Connections 2002**

First Choice Software recently hosted the 2<sup>nd</sup> annual **Connections** technical forum in Austin, Texas. By all accounts, this year's event was an even bigger success than last year's inaugural convention.

Over 100 Clarify developers, managers, and consultants met for two days of technical presentations, demonstrations, sharing sessions, and vendor contact. Over 20 highly-technical presentations were given, helping the attendees to improve their Clarify implementations, see the future of Clarify-based

technology, and build relationships with other Clarify users, customers, and vendors.

Fifteen vendors displayed their products and services in the vendor room for most of the conference. Customers were able to spend significant time with vendors, understanding the breadth of applications and services available to them. Both customers and vendors reported that this was a tremendous experience, and well worth the investment.

Amdocs/Clarify presented two breakout sessions, including presenting the Clarify roadmap. They also staffed a booth in the vendor room.

Perhaps the highlight of the conference was the Monday night event. Conference participants enjoyed a delightful buffet dinner at the Copper Tank brewpub, followed by a private show of the Esther's Follies comedy show/revue, which is an Austin tradition. After the show many ventured out on Austin's famous 6<sup>th</sup> Street, where a fabulous time was had by all (although we noticed a few people got off to a slow start Tuesday morning!)

If you would like more information about **Connections 2002**, please visit the **Connections** website at [www.fchoice.com/connections](http://www.fchoice.com/connections).

## **Product News**

### **Available Now**

Here are just some of the exciting new products available from First Choice.

### **Mail Merge Utility for Clarify**

First Choice's newest workflow product enables you to add powerful mail merge capabilities to any object and any form in Clarify. The mail merge allows you, via a simple GUI, to define profiles and variables for any table or view in Clarify.

Then, using a simple API, any form in Clarify can be turbocharged with mail merge capabilities. Advanced features include table auto-recalculation, and automatic attachment of the merged file. **This new tool is included in the EVERYTHING FOR FREE lease program!**

### **Data Population Tool**

The Data Population Tool provides a framework that allows you to add almost any object into your Clarify database easily and quickly, via the simple ASCII file format provided.

This tool is particularly useful for testing purposes (which is why we wrote it). You can quickly, easily, and repeatably populate databases with sample data.

This new tool from First Choice Software is the latest in a long line of tools, that we wrote for our own use, and then realized that it would be useful for our customers as well! **This tool is also included in the new lease program!**

### **Thin Client for ClearQuality, *fcQuality***

First Choice is pleased to announce the availability of the latest of our thin client offerings: *fcQuality*.

*fcQuality* is a full-featured thin client for ClearQuality, including all the base Clarify features you would expect, including full CR support, duplicates, replicates, status transitions, fixing CRs, and more.

The product also includes the full *fcClient* web infrastructure, including the powerful enhanced console that makes your experience simple and natural.

For more information about this product, please contact us at [sales@fchoice.com](mailto:sales@fchoice.com). **Unlimited use of this thin client is included in the new lease program!**

### **Internationalization for Thin Clients**

First Choice Software is excited to announce the availability of the latest version of our thin clients. The new versions are enabled for internationalization and localization.

*fcSelfService*, our customer-facing thin client for ClearSupport, is localized, which means that **EACH CUSTOMER** can view their web pages (and error messages) in their own native language! The same web page can simultaneously display in English, German, French, Spanish, Hebrew (right-to-left), Japanese, and more!!

This technology allows you to maintain only one set of forms for all your international customers, simplifying your task. At the same time it will enormously increase your customer's satisfaction because they can use Clarify in their native language.

First Choice's other thin client offerings will be localized over the next quarter, so stay tuned for more announcements.

To see a demo of the multi-lingual *fcSelfService*, please visit our web page at [www.fchoice.com/fcss](http://www.fchoice.com/fcss).

### **New API Toolkits**

First Choice Software continues to expand the family of best-selling APIs to allow you to customize and expand your Clarify implementation in new and exciting ways.

In the next two weeks, First Choice is shipping the **FCFL** version of the API toolkit for Field Operations. This will allow you to add powerful functionality to your web pages, Visual Basic programs, Javascripts, and more, in just minutes. Over 50 useful APIs are included  
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that allow you to: install site parts, log time, log expenses, log parts used, and much more!

For more information about this product, please contact us at [sales@fchoice.com](mailto:sales@fchoice.com).

### **Available Soon**

In times when few technology companies have little new to offer, we are excited that First Choice can continue to bring you new and useful technology. Here is a summary of the new products that will be available this quarter from First Choice.

### **API Toolkits Available in New Languages**

First Choice is currently working on **FCFL** versions of several of our best-selling API toolkits. In the next quarter we will be shipping **FCFL** versions of our popular APIs for ClearLogistics Spares Manager and Order Ops, ClearCallCenter, ClearSales, and ClearContracts.

The **FCFL**-enabled toolkits allow you to easily and quickly write web pages that can perform virtually *any* Clarify action. These web pages can be written in a matter of minutes, require just **ONE LINE** of code to call on the toolkit API, and work with **ALL** versions of Clarify.

For more information about these products, please contact us at [sales@fchoice.com](mailto:sales@fchoice.com).

### **Convert Customized CB Code**

Why should you rewrite the customizations on which you spent significant money, just because you want to migrate from thick to thin?

The answer is: You don't have to. First Choice Software will soon ship the long-awaited solution, which is a thick-to-thin code conversion utility: *fcCodeConverter*.

We expected this product to ship this quarter, but several other key projects required us to put the *fcCodeConverter* on the back burner. We are working on it again, and it will be completed in the near future.

The *fcCodeConverter* allows you to recoup much of the significant investment you made in your customizations by automatically converting ClearBasic programs into a variety of web-based languages, including JavaScript, VBScript, and Visual Basic.

The converter is a two-pass compiler, and understands all the intricate issues involved in Clarify customizations.

For more information about the *fcCodeConverter*, please contact us at [sales@fchoice.com](mailto:sales@fchoice.com).

## **Thin Client: Field Operations, *fcLogistics***

First Choice Software is continuing to expand its lineup of fast, easy-to-use thin clients for Clarify. Work began in early December on the newest First Choice thin client: *fcLogistics*.

This agent-facing thin client allows field and warehouse personnel to perform all the logistics tasks they need to get their job done in a simple web application that looks and feels like Clarify, but can be run from any location at any time.

The initial release of the product is expected to provide full Part Request functionality, as well as pick, unpick, fulfill, ship, receive, and part transfer capabilities.

For more information about the upcoming *fcLogistics*, please contact us at [sales@fchoice.com](mailto:sales@fchoice.com).

## **Professional Services Offerings**

First Choice has been known as a company who listens to their customers - and quickly adds new products and services to respond to the customer's needs.

We recently concluded a lengthy series of customer forums and surveys to discover what else customers want from us.

In response to your answers, we have added several new professional service offerings that complement the [Everything For Free](#) lease program.

1. **New Partner Program.** We have expanded our Advantage Partner Program to allow our partners access to all of the First Choice products, including thin client technology, so that they are better able to service your needs.
2. **Certification Program.** A new certification program will guarantee that you know how good implementers are at customizing the First Choice products and environment. This will not be an (all-too-common) "everyone is certified" program, but will require serious commitment and knowledge to gain certification.
3. **Education.** A series of new classes will be made available to both partners and customers on the following topics:
  - **Overview of the First Choice Product Suite.** Includes details on how to install, configure, and use the 50+ products.
  - **First Choice Thin-Client Technology.** Introduces **FCFL**, the APIs, and the thin clients. Shows the user how to program in the environment, and customize the thin clients.

- **Advanced Thin-Client Customization.** How to add new web pages and features to the base environment. How to write complex customizations quickly and easily.

4. **Consulting.** Customers have been very clear that they would like to tap into First Choice's knowledge and experience to help with their most complex needs. We are able to work with you to staff your needs, including upgrades, design/architecture, programming, project management, and more.

For more details on any of these programs, please contact [sales@fchoice.com](mailto:sales@fchoice.com) directly.

## **Employee Profile: Jeanne Sirkin**

Jeanne is the Vice President for Sales and Marketing at First Choice Software, as well as the founder of FCS. She started First Choice in early 1995 to respond to the extreme need for talented Clarify implementers.

She has helped First Choice grow from a small consulting company to the leading Clarify add-on product vendor.

Jeanne graduated from the University of Washington with a BS in Computer Science in 1989. She then moved to Austin, TX, joining IBM's research and development division. While at IBM she worked on a variety of projects, including designing and maintaining database indexing subsystems, OS/2-related projects, and DCE (working on the Cell Directory Services component).

After 5 successful years with IBM, Jeanne decided it was time to strike out on her own. First Choice was born in early 1995, and was intended to stay as a small, highly technical consulting arm of Clarify's PSO organization.

First Choice was highly successful with early clients, including BEA, Microsoft, Echostar, and HP. Jeanne slowly grew First Choice into one of the premier technical consulting firms in the Clarify world in 1995 and 1996.

In 1997 Jeanne decided that First Choice had a bigger mission to fulfill, and directed First Choice to become the first and only Clarify-specific add-on products provider.

Under Jeanne's leadership, First Choice has grown from a small regional consulting firm to a leader in the CRM market, with over 50 available products, including a line of Clarify-based thin clients.

Jeanne continues to supervise all of First Choice's sales and marketing initiatives, and is looking forward to the future of the Clarify world.

## **What Do You Think?**

In each *First View*, we ask you about what products you want to see First Choice develop.

In the past, feedback from this ideas column have helped First Choice Software develop and ship a host of new applications, including (just since the last *First View* our new data population tool, the delay business rule customization described in this issue, and our *fcLogistics* offering that we are working on).

With the completion of **FCFL** (and **FCFL** toolkits) we know have the capability to provide virtually any existing (or new) Clarify-like function that our customers need.

Now, with our web offerings becoming complete, and with our [Everything For Free](#) lease offer taking hold within the installed Clarify base, it is time to look a little further out than the next two or three months.

Specifically, we want to know where you would like First Choice to take our CRM offerings.

What follows below are some ideas that customers have suggested to us in the recent past. We would like your thoughts on these ideas, or please feel free to call or email us with other ideas.

- New business rule system. Several customers have requested a fast, scalable, extensible replacement for rule manager. This new tool would allow administrators to create much more complex rules and logic, with advanced start/stop conditions. It would be faster, and less prone to crashes. A conversion tool would ship with the product to ensure that existing rule logic is retained.
- A Java-based **FCFL**. Several key customers have expressed interest in having First Choice's powerful object framework written in JavaBeans. A new Java implementation of **FCFL** (and the related APIs and thin clients) would be written in pure Java, enabling it to work with virtually any web server or JVM platform.
- A new data model. Since the **FCFL** framework does not require a specific underlying data model, some customers have requested that First Choice consider creating (for key products) a new data model to sit underneath **FCFL** and our thin client offerings. At that point, the customer's CRM experience would be based entirely on First Choice products and technology.

Please take a minute to contact us at [ideas@fchoice.com](mailto:ideas@fchoice.com) to let us know what you think about our ideas for future projects.

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## **Technical Corner**

In each issue of *First View*, the Technical Corner section contains a tip, example, or technique we find useful. We will include them, along with appropriate code examples, in the hope that you will find them useful.

This article describes a customization many customers have asked for over the years. We were going to turn this into a product, but decided instead to write it and give it away to our customers. It was one of the customizations that we highlighted at our *TOOL TIME* session at *Connections 2002* (where we give away useful customizations and tools). It was so popular we decided to describe it in more detail here – for customers who were not fortunate enough to be at Connections.

### **Business Rules – Relentlessly Moving On**

Business rules are a frighteningly useful concept in Clarify. Most Clarify customers use them for both notifications and to start command-line processes.

One of the biggest complaints, however, that customers have with business rules is that you can't "pause" them. Customers have asked for the ability to temporarily stop a business rule and later restart it.

Why would you want to pause a business rule? The customers we've spoken with have had many different reasons, but the most common we've heard is:

```
Business rules should be paused when the key object (in this example, a case) is placed into a particular status (for example, "Awaiting customer data"), and resumed when it is moved out of that status. The rationale is that business rules often help measure customer SLAs (Service Level Agreements), and the customer does not want the SLA "clock" to run while they're waiting for the customer to get back to them.
```

There are many more reasons than this, and we're sure you can think of other reasons that are important to you. Some other common ones include commitments (via business rules) that are paused if someone is out sick or delivery/on-site visits that are postponed if the required parts are delayed in shipment. Again, there are thousands of other reasons you might find to delay/restart the rules.

### **How Should You Pause The Rules?**

The next logical question is, "How should I pause the rules?" It's virtually impossible to know how many rules are currently out there, and when they will be firing. A given subcase, for example, could have no business rules pending for it, or there could be 50 (or more!). You just don't know.

The solution (or at least *a solution*) is actually pretty easy to figure out. Typically, when you want to pause a business rule on an object, you will want to pause **ALL** of the business rules for that object. If you change the status of a case (as in the sample above) to a new status, and want to pause a business rule for that case, you are likely to want to pause all of the rules for that case (**Note:** The provided customization is flexible, however. If you don't want to hit every rule for an object, you can easily code that in).

So, the interface for this customization is simple. The following are two APIs that you can expose to customize the GUI or in business rules to delay/restart business rules:

```
Public Sub delay_br(obj_type As String, id_number As String)
    Dim ret_int As Integer
    Dim id_fld As String

    ret_int = delay_or_restore(obj_type, id_number, id_fld, True)
    print_msgs obj_type, id_number, id_fld, ret_int
End Sub

Public Sub restore_br(obj_type As String, id_number As String)
    Dim ret_int As Integer
    Dim id_fld As String

    ret_int = delay_or_restore(obj_type, id_number, id_fld, False)
    print_msgs obj_type, id_number, id_fld, ret_int
End Sub
```

At this point the above APIs may not make too much sense. But don't worry – they will in just a minute. In brief, each of the APIs take two arguments. The first is the object's type, and the second is the ID number to identify the object of interest. The supported objects are the base queueable objects: Case, Subcase, Probdesc (solution), Bug (Change Request), Demand\_dtl (part request), Dialogue, Contract, Task (action item), and Opportunity.

Each of the APIs calls on a general routine (described in the next section) to delay or restart the business rule. Then, the result code is passed to a routine that will print out an error message (if there was one).

### **So, How Do I Actually Delay a Business Rule?**

Now, we have a callable interface to pause and restart business rules. The question now is, "How do we do it?" We are going to use a little trick to help us. And the trick will turn out to make our task a snap.

Business rules that will fire in the future have a special field defined named *escalate\_time*. This field contains the date and time that the business rule will fire. When the rule manager wakes up (which it does every *n* seconds, as configured) and discovers that a business rule's *escalate\_time* is in the past, it then processes the rule.

So, the recipe for delaying business rules is simple: Move the *escalate\_time* to the future (we chose January 1, 2200 as a safe date that people won't still be using Clarify!) so that the rule doesn't fire.

But when we restore the business rule, we still need it to fire at the appropriate delta time. Let's explain with an example:

Suppose that a business rule will fire (on a subcase) in 18 minutes and 6 seconds from when the *delay\_br* routine is called. Our routine will then set the *escalate\_time* at 18 minutes and 6 seconds after Jan 1, 2200 (at midnight). When we restore the BR we determine that the delta (after midnight on Jan 1, 2200) is 18 minutes and 6 seconds. So, we add that amount of time to the current date/time to set the new *escalate\_time*. This way, the BR has been "frozen" in time, and fires as it should.

It should be noted that all of these calculations are based on elapsed time. Often users will use business calendars for the firing of business rules. The current version only processes elapsed time. First Choice would be happy to work with customers to modify the routines to work with business calendars (it's not too tough).

### **But Business Rules Don't Work On Object Names!**

Before we show you the *delay\_or\_restore* routine, there is one additional piece of house cleaning to do. The *time\_bomb* table (the table that stores business rules records to fire) doesn't use table names, but rather uses table numbers. So, we have to convert the name to a number. This is a common requirement for advanced Clarify customizations, as most Clarify tables use numbers, not names.

Also, this isn't a trivial bulk retrieve, as the name-> number conversion is stored in an adp table in Clarify, and these can't be queried via the BulkRetrieve structure. Instead, you have to use SQL via the SQLExec object, and use a UDT to hold the results. The following code does the trick:

```

                                ' Used for querying the ADP table
Type num_type
  num As Long
End Type
Global a_num As num_type

Public Function get_tbl_num(tbl_name As String) As Long
  Dim the_db    As New SQLDB           ' Structure for querying DB with SQL
  Dim sql_stmt As String              ' SQL Statement string
  Dim t_list   As New List            ' List returned from query

  ' Set the return list type
  ' Create the sql stmt
  ' Execute it
  t_list.ItemType = "num_type"
  sql_stmt = "select type_id from adp_tbl_name_map where type_name = '" & tbl_name & "'"
  the_db.Select sql_stmt, t_list

  ' Get one return item from list
  ' Return target table number
  If t_list.Count = 0 Then
    get_tbl_num = -1
  Else

```

```

        t_list.GetItemByIndex 0, a_num
        get_tbl_num = Trim$(a_num.num)
    End If
End Function

```

### **And Now For The Routine That Does The Work**

That's all of the setup for the routine. What follows is the *delay\_or\_restore* routine that does the work. The key part of this routine is iterating through the found business rules, trying to delay them (or restore them), and erroring out if you attempt to delay an already delayed routine.

```

Const FUTURE_DATE = "1/1/2200"

Public Function delay_or_restore(obj_type As String, id_number As String, _
                                ByRef id_fld As String, is_delay As Boolean) As Integer
    Dim t_ret      As New BulkRetrieve      ' Structure to query the DB
    Dim obj_num    As Long                  ' Table number for querying time_bombs
    Dim t_list     As List                  ' List returned from DB query
    Dim cur_rec    As Record                ' Record they want to delay BRs for
    Dim objid     As Long                  ' Objid of the delay record
    Dim br_rec     As Record                ' Each modified BR
    Dim t_int      As Long                  ' Looping integer
    Dim diff_secs  As Long                  ' How far in the future is the BR to fire?
    Dim new_date   As String                ' New date in future to delay to
    Dim t_save     As New BulkSave         ' Structure to write to the DB with

        ' Get the table number for the table
        ' If bad table number, error/exit
    obj_num = get_tbl_num(obj_type)
    If obj_num < 0 Then
        delay_or_restore = -1
        Exit Function
    End If

        ' Set the ID field based on the object type
        ' If not a supported type, error/exit
    Select Case UCase(obj_type)
        Case "CASE", "SUBCASE", "PROBDESC", "BUG", "DIALOGUE"
            id_fld = "id_number"
        Case "DEMAND_DTL"
            id_fld = "detail_number"
        Case "OPPORTUNITY", "CONTRACT"
            id_fld = "id"
        Case "TASK"
            id_fld = "task_id"
        Case "CONTRACT"
        Case Else
            delay_or_restore = -2
            Exit Function
    End Select

        ' Query for the record
    t_ret.SimpleQuery 0, obj_type
    t_ret.AppendFilter 0, id_fld, cbEqual, id_number
    t_ret.RetrieveRecords

        ' Get the result record
        ' If none found, they gave a bad ID number. Error/exit
        ' Else, get the objid
    Set t_list = t_ret.GetRecordList(0)
    If t_list.Count = 0 Then
        delay_or_restore = -3
        Exit Function
    End If
    Set cur_rec = t_list.ItemByIndex(0)
    objid = cur_rec.GetField("objid")

        ' Now find any BRs for that object
    t_ret.Clear
    t_ret.SimpleQuery 0, "time_bomb"
    t_ret.AppendFilter 0, "focus_type", cbEqual, obj_num
    t_ret.AppendFilter 0, "focus_lowid", cbEqual, objid
    t_ret.RetrieveRecords
    Set t_list = t_ret.GetRecordList(0)

        ' Loop through all of the business rules

```



```

        ' For each one...
        ' Get how far in the future it should fire
        ' Figure out the future date (offset) we'll fire for
        ' Update that field in the BR, and put in the bulk save
        ' Save all of the changed BRs...
For t_int = 0 To t_list.Count - 1
    Set br_rec = t_list.ItemByIndex(t_int)
    If is_delay Then
        On Error GoTo already_delayed
        diff_secs = DateDiff("s", App.CurrentDate, br_rec.GetField("escalate_time"))
        On Error GoTo 0
        new_date = CStr(DateAdd("s", diff_secs, CDate(FUTURE_DATE)))
    Else
        On Error GoTo cant_restore
        diff_secs = DateDiff("s", CDate(FUTURE_DATE), br_rec.GetField("escalate_time"))
        On Error GoTo 0
        new_date = CStr(DateAdd("s", diff_secs, CDate(App.CurrentDate)))
    End If

    br_rec.SetField "escalate_time", new_date
    t_save.UpdateRecord br_rec
Next t_int
t_save.Save

        ' Everything was OK!!!
delay_or_restore = 0
Exit Function

already_delayed:
Err = 0
On Error GoTo 0
delay_or_restore = -4
Exit Function

cant_restore:
Err = 0
On Error GoTo 0
delay_or_restore = -5
End Function

```

### **Wrapping It Up**

Now that you have all the pieces you need, you can start using the customization. But how, or when? One common example is as follows: You could add a business rule to a case where a status change (condition is status = "Await Cust Data") starts a command line that launches **cbbatch** to run the *delay\_br* routine for the case. Similarly, another business rule on case status change (condition is status != 'Await Cust Data') would reverse the process.

That's it!! Pretty simple and pretty useful.

A full copy of this customization is available on our website for your download. Please visit [http://www.fchoice.com/download/connections2002/delay\\_br.zip](http://www.fchoice.com/download/connections2002/delay_br.zip) if you would like a copy of the customization.

Hopefully this information is useful to you. If you have questions about it, please feel free to post them in the *fcConnect* user forum located at: <http://www.fchoice.com/fcconnect>.

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