

ContactWise® CRM

The Continuing Education CRM Solution



[Security]

[Reporting]

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[Increase Communication]

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ContactWise
CRM

The GroupLink logo is a stylized diamond shape composed of smaller diamonds, with the word 'GROUP' written vertically on the left and 'LINK' written vertically on the right.

ContactWise CRM Features & Benefits

Educational Tracking

- Track, record and store educators' feedback, fund raising information, and continuing education training hours/credits, etc.
- Manage school, department or faculty performance
- Create history notes of correspondence
- Set reminders to be notified of critical events or tasks

Reporting

- Generate reports for history, event activity, opportunity, or contact information to better manage department or faculty performance and records
- Create graphical reports compatible with Crystal Reports

Security

- Authenticate to eDirectory/Active Directory via LDAP
- Set rights and roles based on login
- Allow confidential information to be seen strictly by selected individuals
- Secure your valuable customer data from the threat of loss, damage or theft
- Easily connect to multiple databases from one location

Increase Communication

- Easily track email correspondence, phone calls, and other interactions
- Communicate more efficiently among faculty members
- Send personalized email messages to hundreds or thousands of contacts simultaneously

Contact Management

- Manage student, faculty, professor and other staff information
- Create groups to organize students, alumni, donors, faculty and other staff
- View details of each contact within the database through filters
- Plan and measure student recruitment and supporter donations
- Improve prospect, student, alumni, and affiliate relationships

Calendaring

- Easily manage events/tasks with students, alumni, donors, professors and other staff with integrated scheduling through GroupWise or Outlook calendaring systems

Improve Staff Productivity

- Import or export data using Excel or CSV files
- Perform mail merges with Microsoft Word or Word Perfect
- Print labels using Avery label templates
- Track workloads for better time management
- Reduce call time for employees through call lists

Multi-Platform Integration

- Run smoothly on Windows or Linux
- Integrate your email client (Outlook, GroupWise, etc.)
- Import GroupWise or Outlook email messages directly into your CRM database
- View your Outlook or GroupWise calendar directly from ContactWise
- Assign tasks, appointments, or follow-ups within your address book
- Connect other third party applications using Enterprise Web Services

“With this new system [ContactWise CRM], everything is so streamlined and we have the added bonus of having all correspondence recorded in the ContactWise History Tab. This was something we were in desperate need of, which gives us great payback.”

-Corky F., Clackamas Community College

