

ContactWise® CRM

The Government-Focused Solution



[Security]

[Powerful Reporting]

[Constituent Tracking]

[Constituent Management]

[Multi-Platform Integration]

[Improve Staff Productivity]

[Effectively Track Legislation]

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ContactWise
CRM

ContactWise System & Features

Effectively Track Legislation

- Report on public opinion for bills and legislative criteria
- Easily review the history of bills and resolutions
- Generate work status reports of constituents

Group Management

- Create groups to organize constituents and other contacts based on legislative needs
- View details of each constituent within the database through filters

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

Improve Staff Productivity

- Send personalized mass emails or newsletters to thousands of constituents simultaneously
- Import or export data using Excel or CSV files
- Perform mail merges with Microsoft Word or Word Perfect
- Print labels for constituents or organizations using Avery label templates
- Track workloads for better time management
- Reduce call time for legislative employees through call lists

Constituent Tracking

- Log all incoming and outgoing phone calls with constituents
- Record all incoming and outgoing constituent email
- Track constituents' positions on bills
- Create history notes of correspondence with constituents
- Set reminders to be notified of critical events or tasks

Powerful Reporting

- Create graphical reports compatible with Crystal Reports
- Generate reports on history activity and event activity to overview recent constituent correspondence

Multi-Platform Integration

- Run smoothly on Windows or Linux
- Integrate with GroupWise or Outlook/Exchange calendar and email systems
- 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

Maximize Constituent Loyalty

“We do custom reporting which allows [the staff] to just print the report they need and hand it to the senator to let him know what’s going with a particular issue with a constituent.”

- Franka Maerz, Senate of Pennsylvania

