



ContactWise® CRM and SFA

Customer Relationship Management and Sales Force Automation for
Novell eDirectory and GroupWise / Active Directory and Outlook

ContactWise allows an organization to maintain a detailed history of all customer interaction. The history tab gives a complete view of everything happening with a specific lead, from referral to sales to customer service. Salespeople and customer service personnel can add attachments, notes, and other annotations, and view such information in context with everything that has transpired with a particular individual.

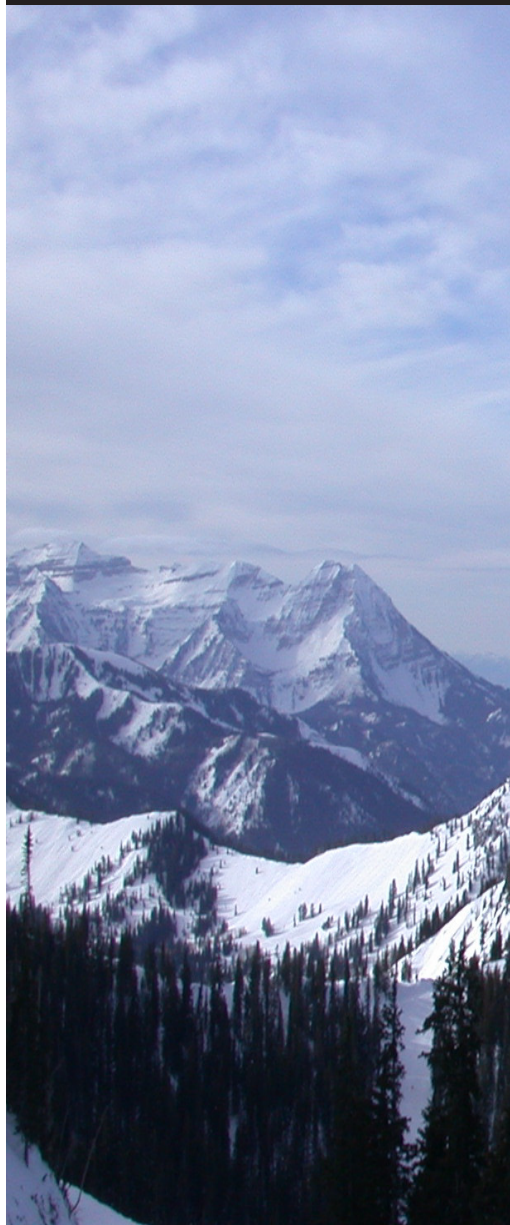
Benefits of ContactWise

- ⇒ Provide a powerful single view of your organization to your customer
- ⇒ Know performance and productivity details whenever your customer calls. Each employee will see what the customer's past interactions have been with your organization, in order to better enable your organization to meet the customer's specific needs.
- ⇒ Ensure all customer commitments are met by having appointments & tasks posted to the appropriate person or department's GroupWise/Outlook calendar.
- ⇒ Track multiple Opportunities by contact or organization (detailed history and event information per Opportunity)
- ⇒ Quick-search Opportunities by sales representative, dollar amount, sales stage, and other user defined fields
- ⇒ Integrate with GroupWise/Outlook calendar, task list, note reminders, and emails—Keep only one calendar, one mailbox, and one task list.
- ⇒ Secure your contact information by assigning rights on who can read, write and delete information.
- ⇒ Access your needed contact information anywhere through LAN, WAN, or VPN connection.
- ⇒ Manage your security rights through your current eDirectory or Active Directory groups.

The integration of ContactWise has opened an entire new world for us. Through the integration of this software we are now able to keep notes on all employee calendars for every follow-up, and allow all 27 members of our sales force to access information on every client we are currently, or have previously done, business with. The leverage provided through this tool, allowing us to keep the pulse of our realtors, is fantastic. ContactWise keeps records of all realtor relations, meaning when we pull a realtor up from our database we get a list of all the customers they have brought to Village Homes, the status of each transaction, and the system providing a link between the two. As far as I am concerned...I've got a Cadillac!

Ed Lowell

VP of Sales Operations for Village Homes



CUSTOMER ENGAGEMENT SOLUTIONS