

## FAQS

**Q:** Why is there no pricing on your website on how much a ContactWise<sup>®</sup> CRM solution costs?

**A:** A ContactWise<sup>®</sup> CRM solution is priced specific to the customer needs. Our CRM implementation team observes that successful and impactful CRM implementations invariably include these critical steps:

1. Quick assessment and focus of your executive's "CRM Victory" objectives (goals, metrics and milestones) ... Simplify, simplify, simplify;
2. Rapid design and further simplification of "CRM Victory Project" scope, including:
  - a. Executive & User Reports (content, format, frequency, etc.);
  - b. Data sources, input streams and process flow needed to produce these reports;
  - c. Naming of CRM team members, and process for their "buy-in";
3. Expedient deployment and continuing simplification during on-site implementation & administrative/technical training;
4. Powerful, yet succinct, team empowerment, accountability & performance training;
5. Timely and ongoing access to, and support from, our team members here at GroupLink (your CRM Victory support team);
6. Additional GroupLink support as you prepare your Executive presentation of the "CRM Victory Project" success, and receive executive approval for your next CRM phase.

Because these six steps are never quite the same for any two of our clients, our customers' investments in their first ContactWise<sup>®</sup> "CRM Victory Projects" vary from client to client. As you can see, we take a consultative approach to your success, which includes design, training, installation, implementation, data import and report development services, etc.. We recommend you speak to a GroupLink sales representative to determine the correct components (services, software, infrastructure, etc.) and investment costs for your organization's initial "CRM Victory Project" .

**Q:** On what databases does ContactWise run?

**A:** ContactWise runs on MS SQL, POstgreSQL, Oracle, and Microsoft MSDE. Please see the "System requirements" page on our website: <http://www.contactwise.com/specs/contactwise/default.asp>

**Q:** Are there add-on modules to ContactWise or do you get everything with a standard purchase?

**A:** ContactWise was designed to be a fully featured CRM tool. It covers everything from Contact (Customer, Constituent, Citizen, etc.) Relationship Management (CRM) to Sales Force Automation (SFA). There are no additional modules to purchase.

**Q:** How do people connect to ContactWise remotely?

**A:** ContactWise has a "GO REMOTE" function, which allows the users to take a specified number of contacts with them on their laptop. The user can make updates to the contact records while they are on the road. Upon their return to the office, when they reconnect to the main database, ContactWise will sync their updates to the main database. The other alternative is to use ContactWise Web for live



database updates. We do not recommend using ContactWise 32bit over a VPN. If you want to connect live using the 32 bit version, we recommend connecting through a LAN or a WAN pushed by Citrix.

**Q:** Can I import contact records from ACT! or Goldmine into ContactWise?

**A:** Yes, ContactWise allows you to import from ACT or GOLDMINE in .xls or CSV file format. The import wizard will walk you through the field mapping to ensure that the data is placed in the correct fields in the contact record.

**Q:** Can I import my GroupWise or Outlook Address Book into ContactWise?

**A:** Yes, in the same way as ACT! Or Goldmine data is imported into ContactWise (see above question). Additionally, ContactWise is equipped with a GroupWise Address Book Add/Update Utility that allows your GW address book contacts to be added to ContactWise on a regular basis.

**Q:** Can you customize fields within ContactWise?

**A:** Yes, ContactWise is fully configurable and custom fields can be added at anytime through the Database Administrator tool.

**Q:** Does ContactWise have its own reporting engine?

**A:** Yes ContactWise has a report builder in the system. You can also use a third party reporting tool such as Crystal Reports or Business Objects for your reporting needs. We also offer the ContactWise Web Reporting Engine to meet additional reporting needs.

**Q:** Does ContactWise integrate with GroupWise and Outlook?

**A:** Yes ContactWise integrates with both systems for email, task management and calendaring purposes.

**Q:** Is ContactWise only available in English?

**A:** At the present time yes.