A Village Software Product

Contact Management Manage All Contact Information

"I am confident that the system...will be a fundamental part of our ability to grow our investor and donor programs, ultimately enabling us to provide more capital and support to benefit the lower-income families we serve." - Jim Hamel, Director of Investor Relations New Hampshire Community Loan Fund

With Contact Management* you can...

- ✓ Maintain all basic contact information (multiple addresses, numbers, etc.)
- Define relationships amongst all contacts
- Record memos, to-do-lists, telephone logs, follow-up notes for every contact
- Define mailings and generate mailing labels
- Search for contacts based on multiple criteria
- Group and/or categorize contacts
- Define any number of new custom fields for all contacts

OVERVIEW Contact Management is the most comprehensive system available in the market for CDFI and Microenterprise organizations to effectively manage contact information. Contact Management seamlessly integrates with Money In, Money Out, Technical Assistance and other modules of MIMOTA to manage your information easily and powerfully.

BASIC CONTACT INFORMATION Contact Management records all contact information such as mailing address (unlimited multiple addresses), telephone numbers (up to 18 numbers), email address, etc.

RELATIONSHIPS You can define relationships amongst the contacts in your database and add notes, memos, and next action lists to all records. Relationships functionality allows you to link various people for networking.

MAILING Define mailings for contacts (which mailing[s] go to which address[es]) and generate mailing labels automatically. You can even assign mailings to someone related to a contact.

OTHER Add contacts to your own groups/categories; generate merged documents using your own docs (thank you letters, etc.)

FLEXIBILITY Contact Management is available both in Microsoft Access (for small and medium organizations) and SQL (for medium to large organizations) versions - through a cost-effective per user pricing plan.

Friends and Relationships
Find by Contact ID Cate Name Cited New Relationship Select a Contact and Relationship Type and citck Add. Cited New Relationship Type and citck Add. Business Inc Borrower, Busi Consultant. Name Information Prefix First / MI Prefix Business Prefix Business Contact Add Contact Business 246 0 and 1 a
Organization Business Inc S1 Job Title Executive D S1 Solutation TA Trabe - Inden Township - Technical Assistance, Ted 939 Note / Attr. Created By Created By
Address Mailings Details Relationships Investments Donations Prospect Next Action Notes Tech Assistance Inquiries
Addresse, Phone, Web Information Addresse On File Addresse Con File Addresse Labels Addresse Labels Business Fax [207] 246-4646 Business Fax [207] 246-4647 Busines Fax [207] 246-4647 Busines Fax [20
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