

# 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

- ✎ Excellent customer support
- ✎ Technical assistance & training
- ✎ Free upgrades & installation

**Call us today!**

**800.445.3047**

**mimota@villagesoft.com**

\*The Contact Management module is available through a per-user pricing plan in both Microsoft Access (for small organizations) and SQL Server versions (for large organizations)

**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.

