

# ContactEase™

Customer Relationship Management (CRM) System

IF you want to share and manage contact data and leverage marketing information

THEN we have the solution!

ContactEase™ provides a powerful but streamlined solution that's easy to use and easy to administer. The software achieves the optimum balance between power, features and usability. Users get the flexible and efficient data management they need without unnecessary features that confuse and distract.

ContactEase is the solution that enables companies to manage and leverage information on clients, prospects, competitors, contacts, and employees. With ContactEase, organizations can eliminate the need for multiple and overlapping data repositories while providing professionals with strategic information, not just static data.

## CONTACTEASE IS CRM

ContactEase makes client relationship management easy through its:

- Intuitive and friendly user interface
- Easy installation, rollout, and training
- Seamless integration with Outlook, GroupWise, and Lotus Notes
- Powerful searching and quick lookup features
- Customizable fields
- Complete contact history tracking for meetings, calls, faxes, and e-mail
- Ability to maintain private contact data as well as corporate information

### CLOSE THE LOOP ON CLIENT AND RELATIONSHIP INFORMATION

Create corporate database to share information

Capture intellectual capital about clients, prospects, and contacts

Realize productivity gains and increased employee efficiency

Maximize ROI with print and web marketing messages

*"I was really surprised at how easy it was to learn!"*

— Anna Hoffman  
Schmidt Marketing, Inc.

*"We took a good look at the major contact management systems, and found ContactEase to be the best solution for our firm."*

— Kelly Chandeysson,  
Director of Marketing,  
The Stolar Partnership

*"Virtually all of our lawyers and staff use it. We needed something that was easy to use and that fit our budget. The fact that we can always count on the ContactEase staff whenever we need their help or support is a big plus."*

— Sally-Anne Homer, IT Manager,  
Loyens & Loeff

## CONTACTEASE ADAPTS TO YOUR ENTERPRISE

Flexible features:

- Security at database, user, group, and field levels
- Data integrity with synchronization to desktop
- Activity tracking for phone calls, e-mails, mailings, and meetings
- Private and public records, including selective sharing of contacts

## CONTACTEASE INTEGRATES WITH OFFICE APPLICATIONS

Maximize ROI by integrating ContactEase with existing software investments. Cole Valley specialists will tailor these integrations to meet specific organization needs, including:

- Synchronization with Microsoft Outlook contacts
- Palm Pilot and Lotus Notes synchronization
- Integration with all MAPI-compliant e-mail applications, such as Outlook and GroupWise
- Integration with fax applications such as RightFAX and WinFax
- Word Processing integration including MS Word and WordPerfect
- Integration with business card scanners including Cardscan
- Launching e-mail from ContactEase, or accessing ContactEase contacts from within e-mail

## CONTACTEASE MEETS PROFESSIONAL SERVICE NEEDS

Increasing productivity with enterprise software is a key consideration. Professional services firms can make the most of limited resources by choosing a solution that empowers employees while gathering intellectual capital for the business. ContactEase provides flexibility and portability for laptop users, synchronization for Palm Pilot users, and powerful security for administrators.

## CONTACTEASE WORKS FOR BIG AND SMALL FIRMS

ContactEase offers choices tailored to organizational needs. Both the Enterprise and Business Edition use the same database structure, making upgrades simple at any time.

- The Enterprise Edition is for 25 or more users using a firm-wide database. It is based on Microsoft SQL Server (6.5 or above) and offers powerful security and customization.
- The Business Edition is a scaled-down version offering the same security and functionality. It is designed for smaller organizations, using Microsoft Access.

*"We were amazed at how user friendly it is. The data conversion was fast and painless. Now running mailing lists is a piece of cake. I can't say enough about this product."*

— Risa Brownstein, Administrator,  
Levy & Droney

*"ContactEase's incredible integration makes it possible for all of our departments to share contact information while still using the products we're used to."*

— Don LeBlanc, Regional IT Manager,  
CBC Radio - Canada

*"We are expanding the use of it way past marketing; we are using it for recruiting and HR, and intend to use it as our firm's main employee database."*

— Dan Santoscoy, Director of IT, Butzel Long