

Modern Workplace Contact Manager

Contact Management for Microsoft 365

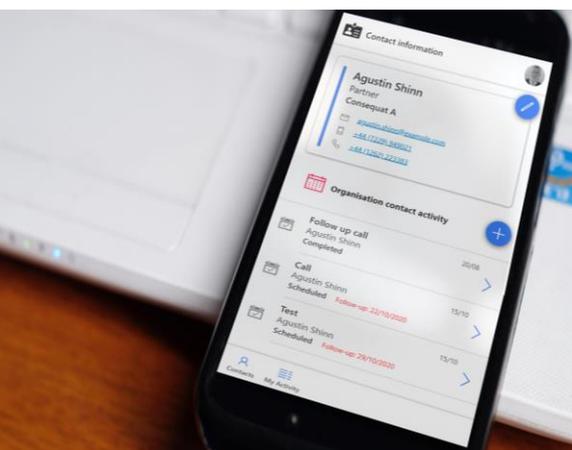
Modern Workplace **Contact Manager** is an easy-to-use contact management solution that works both in the browser and on mobile devices.

It helps you manage your clients, prospects, suppliers and other contacts more efficiently, improving your relationship management with important contacts and the organisations you work with.

Manage contacts in one place

MW Contact Manager makes it easier to organise your contacts in a single location that is always accessible, wherever you are.

You can store, manage and categorise detailed information for companies and contacts (including for data privacy compliance). Users are able to easily access contact details for telephone and email communication, or to review contact history, add notes or schedule future activity.



Accessible from any device

In the browser, MW Contact Manager gives you a single view of all your contacts and contact interactions. When you are on-the-go, the mobile app gives you quick access to contact details and activity history.

Using the mobile app, you can also add and edit contact details and add new quick notes. The app includes a 'My Activity' dashboard so you can focus on your own contact notes history.

- ✓ Centralise contact management
- ✓ Streamline interactions and activity
- ✓ Improve contact relationships
- ✓ Improve data security and compliance
- ✓ Boost productivity with M365 integration
- ✓ Leverage M365 to save time and money

Modern Contact Management for the Modern Workplace



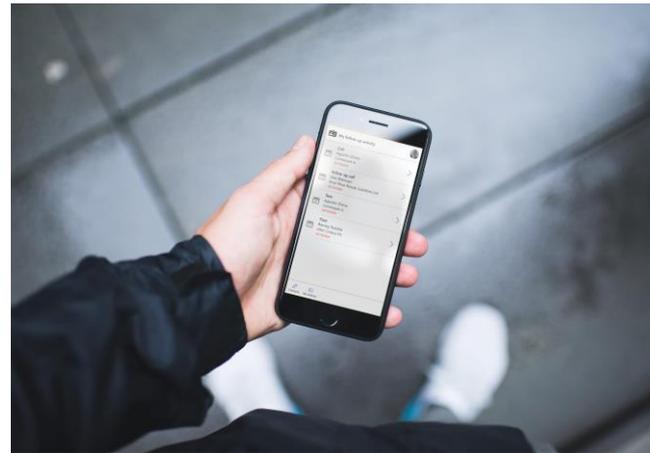
MW Contact Manager uses Microsoft 365 technology to provide a modern user experience that is simple and easy to use. The service is available on any device from any location and users are automatically signed in securely with their normal Microsoft 365 credentials.

MW Contact Manager is designed to be **'Teams Ready'**. It can be added easily to Microsoft Teams, so all its features and your contact data are accessible within the Teams experience.

Contact notes and activity

MW Contact Manager enables you to record, log and track all your important contact interactions.

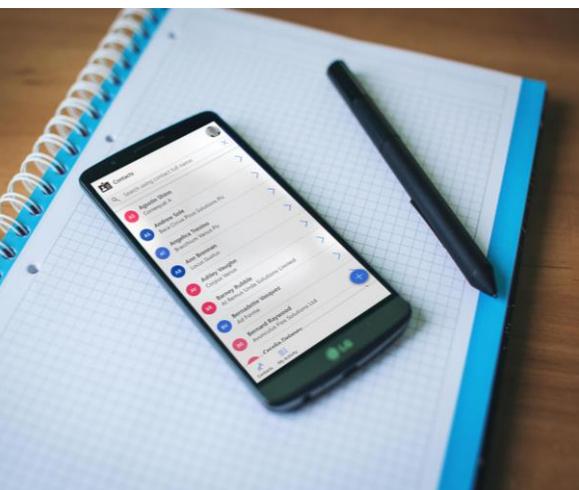
Contact notes help you to track and manage relationships – for sales, client servicing, supplier management, cases or any other contact activity. You can record notes and activity updates and schedule follow up actions to keep on top of your relationship activity.



Use with MW Sales Manager to extend your CRM capabilities

MW Contact Manager is designed to work with the MW Sales Manager app, so you have a single **golden source** of contact information that is used across the organisation.

With a single source of information, all staff - whether they are working directly on sales, or on client service or other functions outside sales - will always be up to date with contact activity and the latest status of contacts.



Feature Highlights

- Store and manage **detailed** contact and company **information**
- Record and access **notes** for contact interactions and **activity**
- **Schedule** follow up activities
- Single view **Contact Dashboard**
- 'One click' **email** and **phone** call communication
- Personal home page with pinned **favourite contacts**
- Mobile **'My Activity'** dashboard
- Captures Lawful Basis for **data privacy compliance**
- Integration with **MW Sales Manager**
- Custom **reporting** and easy export to Excel

Contact us now to book a demo or to find out more about MW Contact Manager