

Contact Management

Looking for a way to improve follow-up communication with your members and visitors? Contact Management can help using its workflow approach. Easily assign and manage tasks, effectively ensure staff and volunteer accountability, and efficiently track the progress of assigned tasks. Task assignments are routed quickly via e-mail. From hospital visitation by pastoral staff to youth group projects, the dashboard link keeps everything at your fingertips.

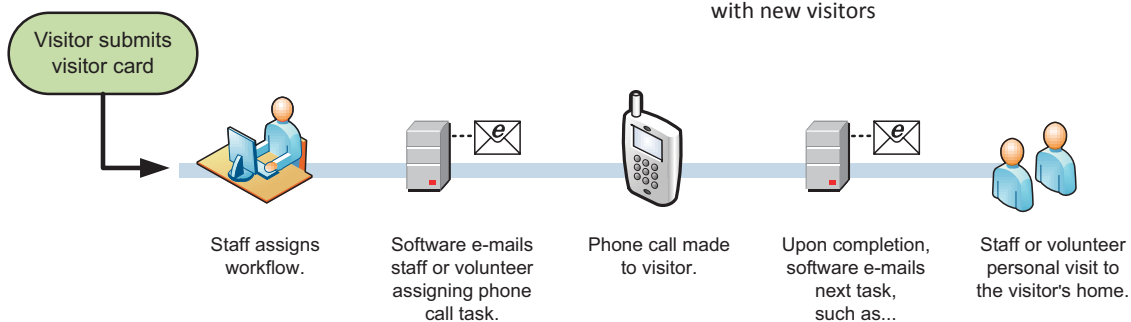
Features and Benefits

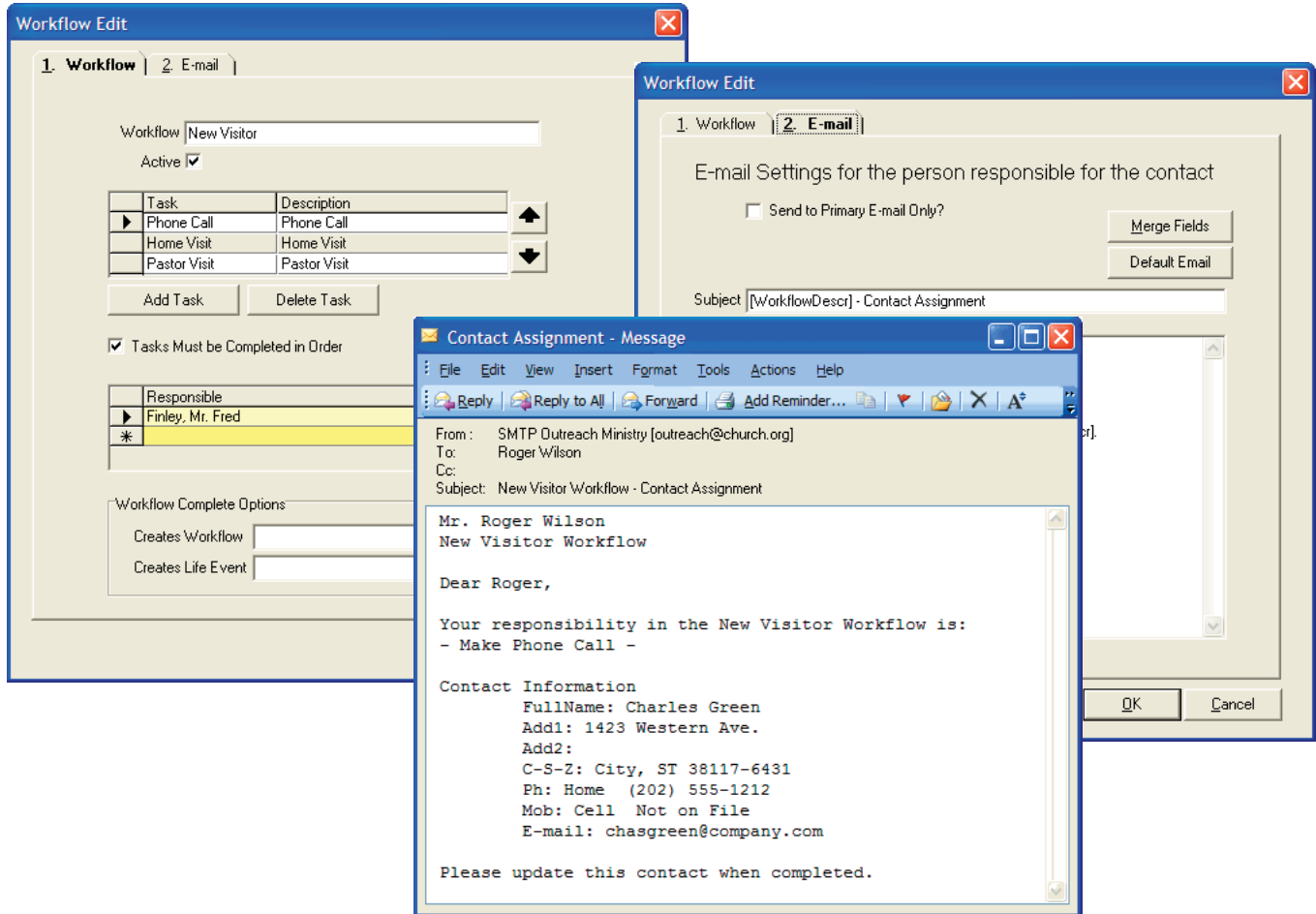
- Create customized, user-defined workflows and tasks to meet your organization's unique ministry goals
- Easily add, activate, inactivate, or delete workflows
- Arrange tasks to be accomplished in specific order
- Indicate which task completes workflow
- Task assignments are sent quickly via e-mail for each step in the workflow process
- Completed tasks can be set up to trigger the next step in the process
- Tasks and activities within a workflow may be made private for confidential items such as counseling sessions
- Track workflow progress for each task in a process
- Receive daily e-mails that summarize each workflow's progress, detailing incomplete tasks and the individuals responsible
- Use dashboard filters to drill down to specific workflows or tasks
- Use the dashboard sorting feature to see which items require more urgent attention
- Automatically assign profiles to GlobaFILE record
- E-mail responsible parties when it is their turn to complete a task
- Associate profile codes with specific tasks to enable detailed reporting
- Integrates with the dashboard to keep task assignments visible

Required modules:

- GlobaFILE

Your staff can create customized workflows to meet your organization's unique ministry goals. Review the diagram below to see how Contact Management can help you follow up with new visitors





Route assignments quickly via e-mail. Log notes on activities associated with each task.