Contact Management
Built-in Feature

SINGLE POINT

Single program for loan servicing, or fund management, trust accounting, contact management and marketing.

EMAIL MARKETING

Built-in feature for email marketing campaigns WITH ATTACHMENTS.

MAIL LOG

All emails and snail mail log.

CONTACT LOG

- Incoming calls
- Outgoing calls
- Email
- Fax
- Letter
- In Office Visit
- Out Office Visit

INTERFACE WITH OUTLOOK

Maintain calendar items in the program and simultaneously with Microsoft Outlook.
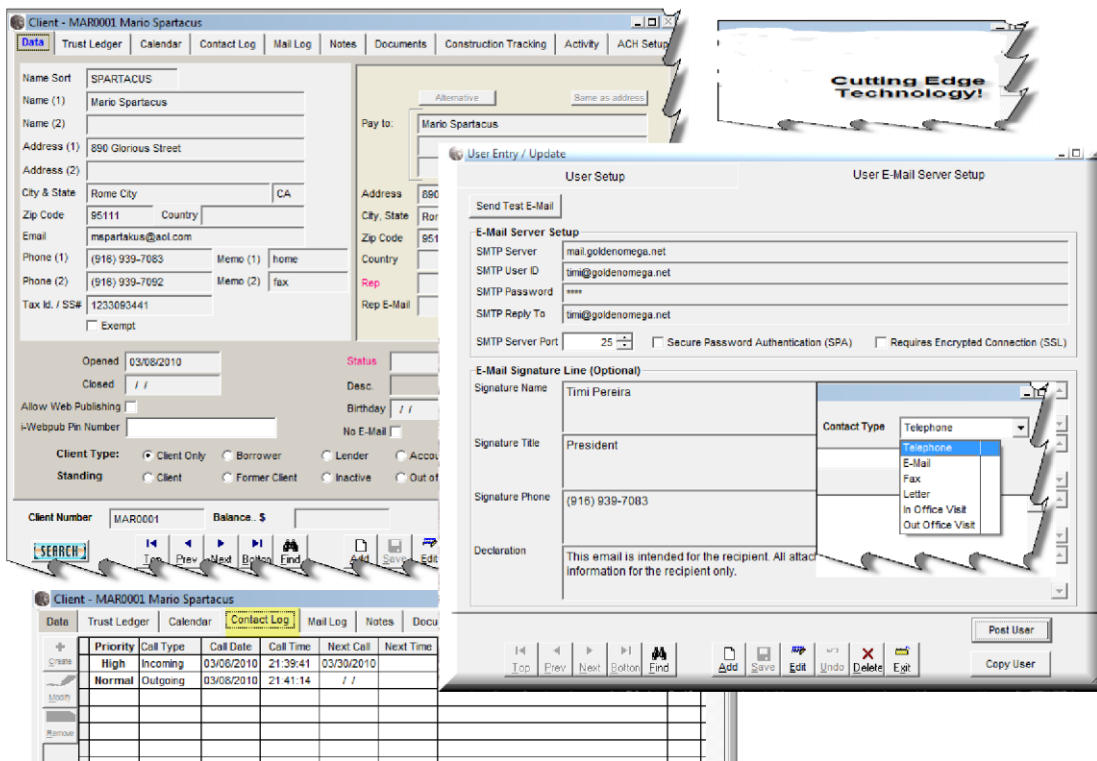
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i-Servicing and i-Trust Built-in Feature
Contact Relations Management & Marketing

- Contact Relations Management, Calendar with Outlook Interface and Marketing features are built-in in i-Servicing, i-Pools and i-Trust software modules.
- CRM-Calendar and Marketing feature available for all Clients and Prospect Borrowers, Lenders/Investors and Payables, all in one database with filtering options..
- Create regular email newsletters and regular solicitations of prospects with complete contact management log.
- Keep in touch with vendors and expand your networking circle.

CRM and Marketing Features: the Latest in Technology

- Microsoft Windows® /VISTA, Windows 7 & 10.
- LAN, CITRIX®, and Microsoft® Terminal Server.
- Complete contact management system.
- Complete email tracking system within the program.
- Complete email solicitation system within the program.
- Complete reporting for contacts, calendar, emails, letters.
- Single prospect or client emails or custom letters.
- Mass prospect or client emails or custom letters.
- Managers can check employees Contact or Mail log with data in a centralized database.
- Special user security only for Marketing.
- Microsoft Outlook® Calendar and Email interface.

SERVICES AVAILABLE

Technical Support

Installation and Setup

Maintenance

Customization

On-Site Training

Training via Internet & Phone

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