



**Designed specifically for
voluntary sector infrastructure organisations**

Priced aggressively - from £400*

**Mailings (regular and one-off),
contact history, outputs,
events, product sales,
membership,
and more**



* Basic package for 1 to 2 users
- plus £150 annual support, plus data transfer and training costs

What's in this slide show?

Why choose contactLINK?

so you can decide
if it's worth considering

Prices

so you can decide
if it's in your budget

What contactLINK can't do

so you don't spend ages
and then find out it's not for you

How to try it out yourself

so you can decide
whether it matches your needs

Existing clients

so you can ask them
what they think of it

Contact us

how to contact us

Why choose contactLINK?

Full of features that
match your day-to-day work

A quality product

It will save you money

Excellent support

Simple to use - simple to install

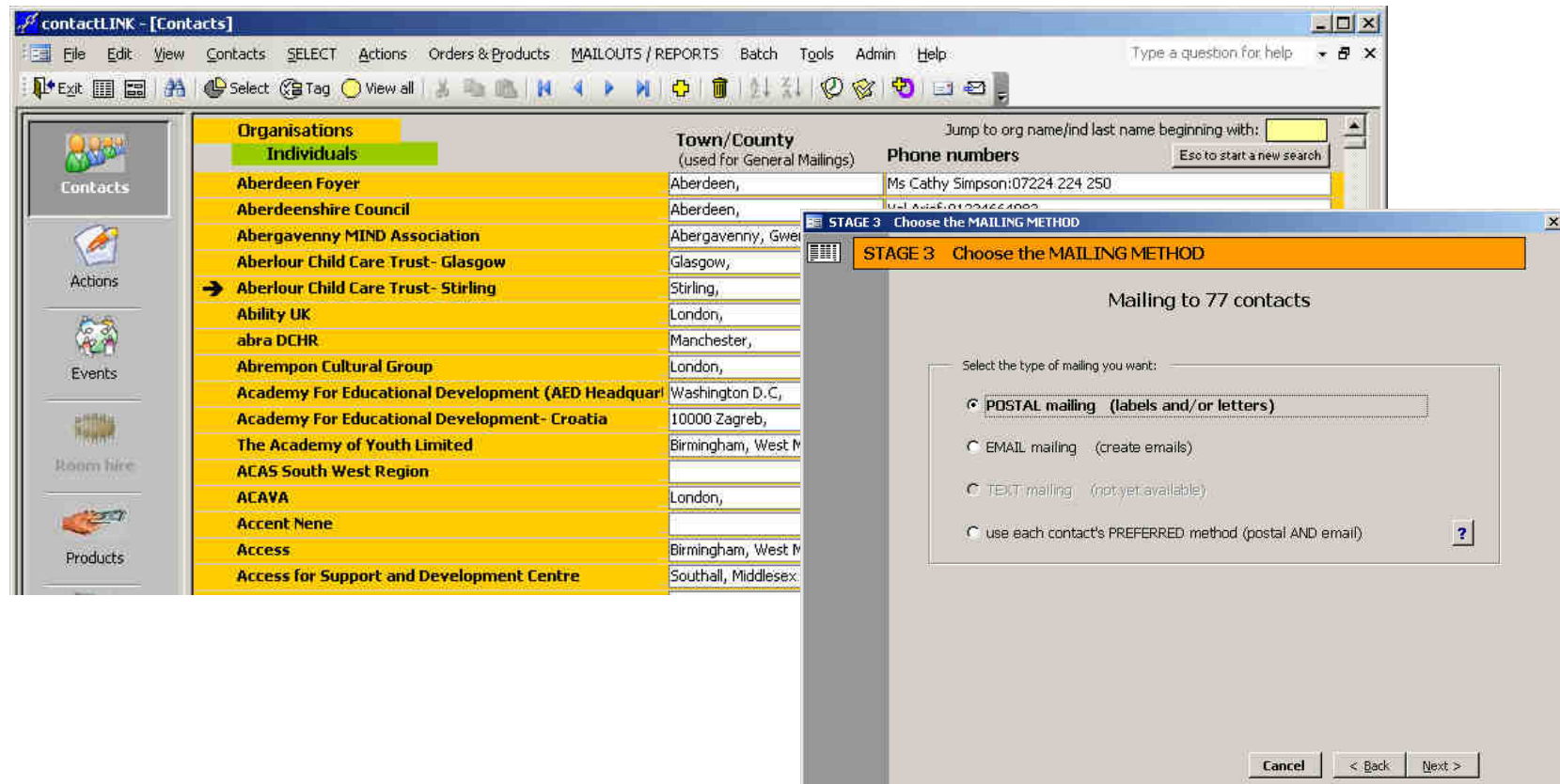
We'll handle your data transfer



It's a quality product

Clearly designed screens

Clearly designed processes, wizards and help screens



Full of features you need for your work

Regular mailings	email, postal, text
Targeted mailings	for marketing
Contact history	who contacted who, when, why etc
Membership	used for subs, CRB management, etc
Event management	AGMs, training courses
Reporting	for staff, management, outputs etc

“The database is brilliant when it comes to quarterly reports, I can just pull off everything I’ve done in the time period and view the different actions.”

Jill Davies
South Hams CVS

Excellent Support

Every day that you use contactLINK ...

Personal Support for all users - 9 to 5, Mon to Fri, from 3 trained staff

Remote access support - so we can guide and show you over the internet

User manual (currently being developed)

*“Quick response time and clear indication of solution timescales and actions needed.
Good telephone support.”*

Duncan Wood
Involve - Mid Devon CVS

But our aim is to support the voluntary sector.
So we provide support at ALL stages of your process:

When you considering what database to buy ...

FREE guide to 'choosing a database'
[includes links to our competitors!](#)

When you first set up contactLINK ...

FREE guide to 'introducing contactLINK in your organisation'

FREE support in setting up contactLINK *

Face-to-face training for all staff

FREE 'guidelines for using contactLINK within your organisation' *



* we may quote a charge for these for larger organisations (e.g. 8 or more users)

It's simple to use, simple to install

The one thing we hear again and again when people first see contactLINK is

“it's so intuitive to use”



And installation is simply a folder on your server and a shortcut on each user's machines – as simple as that

We'll handle your Data Transfer

We will transfer all your data from your old systems

Outlook, Word, Excel, Access, and other systems (we have many tools to make this a fast, efficient and effective process)

We will give you a clear idea of costs before any work

We can also provide an extra tool to sort out duplicates

if you're bringing data in from more than one source

And keep your data up-to-date

send out a 'data check form' to all or selected contacts on your database. They can then check their details, make any corrections and send it back to you.



contactLINK works with ...

Word for letters and labels

Outlook and Outlook Express for emails

plus all other email packages

Excel for exporting data and reports

and then as add-ons at extra cost ...

via your web site

export details of organisations to your web site, so that people can search for information themselves

import details of product sales, event bookings from your web site

with Sage

import details of product sales, event bookings from Sage

Prices

Decide on the maximum number of users you want to be able to log on *at any one time* and whether you need any Advanced features ...

	BASIC		ADVANCED	
For number of users	Purchase cost	+ yearly support cost	Purchase cost	+ yearly support cost
for 1 or 2 users	£400	£150	£800	£250
for 3 to 5 users	£600	£175	£1000	£300
for 6+ users	£950+	£250+	£1500+	£450+

Contacts Mailouts Actions Categorisation User defined fields Reports on all the above User security & permissions	Membership management Outputs & Outcomes Events Product sales Equipment & Room hire
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Extra costs to consider

Data transfer	i.e. transferring any existing data on spreadsheets, databases, etc. to contactLINK	Usually about £100 to £300 Send us your data and we will provide a quote for you
Training	By phone or email	£65 /hour
Training	Face-to-face	£65 /hour + travel

Notes:

VAT is NOT chargeable

Prices and rates are for voluntary and not for profit organisations (others on request)

Prices and rates are valid until 31/12/2009

What it can't do

If you can answer yes to any of the following then contactLINK may not be for you:

Do you use Apple Macs?

... although we do have a client doing this

Are you looking for a web based system?

... although people can access contactLINK from outside of the office and selected data can be exported to your web site for people to search

Do you *mostly* do case-management of individuals?

e.g. taking people through a process of care, support etc

while contactLINK can keep the history of your contact with people, its not been designed primarily as a case management system

Do you keep a lot of information related to families / households?

contactLINK has been designed for 2nd tier organisations that deal mostly with organisations, workers and individuals – not families etc. Although one of our clients is using it for that

How to try it out yourself

On the next few pages are a few screenshots ...

Alternatively:

- a quick 5 minute demo on our web site
- email us for a **fully working demo** copy to try out at your office
- or we'll run a **demonstration via the internet** for you for free!

Simple screens ...

list and summary contact screens shown here

The screenshot displays the contactLINK software interface. On the left, a sidebar contains navigation icons for 'Contacts', 'Actions', 'Events', 'Room hire', and 'Products'. The main window shows a list of organizations under the 'Individuals' tab, including 'Age Concern Devon', 'Arthritis Care', 'Atlas Youth Charity', and others. A second window is overlaid on top, showing the 'Arthritis Care' summary screen. This screen includes a 'SUMMARY' tab and a list of staff members: Kay Webb (Administrator), Ms Gail Doran (Finance), Mrs Jean Halmes (Chief Officer), and Fred Smith (Outreach). Below the staff list, there is a table of contact information for the organization's office and store locations.

Phone	Switchboard	01890 605266
Phone	Ms Gail Doran	01890 605261
Phone	Mrs Jean Halmes	01890 605262
Phone	Store	01890 559547
Email	Ms Gail Doran	gail@ArthritisCare.com
Email	Mrs Jean Halmes	jean@ArthritisCare.com
Email	Ms Gail Doran	Private@ArthritisCare.com
Email	Kay Webb	info@ArthritisCare.com
Address	Office	Abbey Mount, Buckfastleigh, Devon T
Address	Store	Unit 2A, Westfield Ind Estate, Buckfa

Highly active organisation effective communicator:

General Notes:

record updated

1 of 82

Form View

“We struggled with a 'home-made' database before which was not up to the job - contactLINK gives us a record of all our activity in one place”

Sue Wroe
Teignbridge CVS

See all your data in one place ...

workers and actions/activities screens shown here

The top screenshot shows the 'Workers' tab for 'Arthritis Care'. The interface includes a menu bar (File, Edit, View, Contacts, SELECT, Actions, Orders & Products, MAILOUTS / REPORTS, Batch, Tools, Admin, Help) and a toolbar. The main content area displays a table of workers:

view sort	general mailings	Name of individual	Job Title	Department	Notes	No mailings LEFT
		Kay Webb	Administrator			<input type="checkbox"/>
		Ms Gail Doran	Finance			<input type="checkbox"/>
		Mrs Jean Haines	Chief Officer			<input type="checkbox"/>
		Fred Smith	Outreach			<input type="checkbox"/>

The bottom screenshot shows the 'Actions' tab for 'Arthritis Care'. The interface includes a menu bar and a toolbar. The main content area displays a table of actions:

Showing all actions		Add an action TO DO or DONE:				view more
	Due date	Action Type	Categories	Details	User(s) Resp	
	TODAY	26 10 09	Rpt	General - Funding	Effect of changes in local funding	MG
	<input checked="" type="checkbox"/>	20 08 08	B Ltr	General - Funding	Invite to AGM	LR
	<input checked="" type="checkbox"/>	21 05 08	B Ltr	General - Funding		LR
	<input checked="" type="checkbox"/>	20 05 08	B Ltr	Support - Accessed Training		LR
	<input checked="" type="checkbox"/>	20 05 08	B Ltr	General - Funding	Warning of local Government funding changes	LR
	<input checked="" type="checkbox"/>	22 05 07	Ltr	General - Funding	send funding forms and SPIG and members + letter	SW

Detailed reporting ...

event attendance list, actions report and membership lists shown here




Attendance List for Conference - IT And Outcomes 21 May 09

Individual	Organisation	Job Title
<input type="checkbox"/> Georgina Carpenter	Cancer Research Devon	
<input type="checkbox"/> Jean Haines	Arthritis Care	
<input type="checkbox"/> Maria Kirk	Moor Trees Director	
<input type="checkbox"/> Rebecca Williams	Learning Disability Wales Resources Co-ordinator	



Subs/Members List

Member	Joined	Renewal	Expired	Reference number	Membership Type
Age Concern Devon	28/11/06	28/11/08			Income £2,001 to £10,000
Arthritis Care	18/07/07	18/07/09			Income £10,001 to £25,000
Cancer Research Devon	12/08/06	12/06/09			Income over £50,000
Devon Development Association	01/05/09	01/05/10			Income £25,001 to £50,000
Moor Trees	02/02/09	02/02/10			Income below £2,000
Parkinson's Disease Society	18/09/07	18/09/08			Income £2,001 to £10,000
Pettingay Youth Association	01/05/08	01/05/09			Income below £2,000
Relate	02/06/08	02/06/09			Income £10,001 to £25,000
ESOP					Income over £50,000



15 mins Actions Report

ALL actions (for Marilyn Flynn) Grouped by Action types and sorted by Due date (then Completed date)

Start Date	Completion Due Date	Completed Date	User Responsible	Number Contacts Involved	Time spent hrs mins
Email					
09/04/08	11/05/08	11/05/08	Marilyn Flynn	2	
<i>suggested constitution and clause</i>					
Contacts involved: Chestrick Community Hall					
Group Totals: 1 action(s) contact(s) involved: 2 time spent:					
Fax					
	22/06/08	10/07/08	Marilyn Flynn	1	
Contacts involved: Westlake Cricket Club					
Group Totals: 1 action(s) contact(s) involved: 1 time spent:					
Letter					
01/07/06	07/08/06	03/07/06	Marilyn Flynn	4	1 0
<i>Send SPIG details</i>					
Contacts involved: RNIB					
05/08/07	09/09/07	09/09/07	Marilyn Flynn	2	
<i>Send funding info.</i>					
Contacts involved: Cancer Research UK					
Group Totals: 2 action(s) contact(s) involved: 6 time spent: 1 0					
No Type recorded					
	10/07/08	10/07/08	Marilyn Flynn	2	0 0
Projects - Project C					
Contacts involved: Age Concern Devon					
Group Totals: 1 action(s) contact(s) involved: 2 time spent: 0 0					
Phone call					
01/07/07	02/08/07	02/08/07	Marilyn Flynn		
<i>Send funding info.</i>					
Contacts involved: Royal Br					
Group Totals: 1 action(s) contact(s) involved: 1 time spent:					
Report					
	28/09/07	09/10/07	07/10/07	Marilyn Flynn	
Contacts involved: Oxdam					
01/06/09	04/06/09		Marilyn Flynn		
Support - Development Support Projects - Project A					
Contacts involved: Skills Ce					
Group Totals: 2 action(s) contact(s) involved: 2 time spent:					
GRAID TOTALS: 8 action(s) contact(s) involved: 11 time spent: 1 0					

Printed: 26 Oct 09 [by: MF] Your

"The database is brilliant when it comes to quarterly reports, I can just pull off everything I've done in the time period and view the different actions."

**Jill Davies
South Hams CVS**

Wizards, Mailouts, Labels and more ...

The screenshot displays the contactLINK software interface. The main window is titled 'STAGE 3 Choose the MAILING METHOD' and shows 'Mailing to 77 contacts'. It offers three mailing options: 'POSTAL mailing (labels and/or letters)' (selected), 'EMAIL mailing (create emails)', and 'TEXT mailing (not yet available)'. Overlaid on this is a 'One off Letter' dialog box titled 'STAGE 6 Choose letter/label template to use'. This dialog has two panes: 'Select the LETTER template...' (with options like 'Letter Invite To Event' and 'Letter General') and '... or the LABEL template to use:' (with options like 'Label Badge 3 X 6 First Name' and 'Label 2 X 7 - L7163', where the latter is selected). Below these panes is a table for 'Name at end of letter?' with names and roles. In the background, a Microsoft Word document is open, showing a table with mailing list data.

Devon	Mrs Jean Haines Arthritis Care Abbey Mount Buckfastleigh Devon TQ6 2TJ	Diane Macdonald Atlas Youth Charity 2 Rangers Close Western Road Bidwell Devon TQ2 2BW
er Centre CR	Mrs Alison Hart British Red Cross Dudwick Branch Steer Point Bungalow Dudwick Devon TQ7 5NL	Business Design Centre 52 Upper Street London N1 0QH
Carpenter arch Devon ams JU	Mr Charles Tyler Cancer Research UK 77 North Lane London E9 4LI	Charities Evaluation Services 10 Coldbath Square London EC1R 5HL
ell mmunity Hall DV	Mr John Mead Dartmouth Housing Co-op 25 Mead Lane Dartmouth Devon TQ6 6FT	Mrs Jean Haines Dartmouth Play group 2 St Johns Road Lee Mill Dartmouth Devon TQ7 7GG

Events, membership, products ...

Event attendee list and special needs shown here

The screenshot displays the contactLINK software interface. The main window is titled "contactLINK - [Events]" and shows a menu bar with options like File, Edit, View, Events, MAILOUTS/REPORTS, Tools, Admin, and Help. The main content area is for an event on "21 May 09" titled "Conference - IT And Outcomes". It has tabs for General, Attendees, Attendee Fees, Settings, Fees, Food, Venue, and Locations. The Attendees tab is active, showing a list of attendees with columns for Role, Organisation, Worker or Individual name, ALL Status/Stages, View details, Needs?, Notes, and Letter or email. Below the list, it shows "Participants: 4" and "Attending: 4".

Role	Organisation	Worker or Individual name	ALL Status/Stages	View details	Needs?	Notes	Letter or email
Organiser	STAFF	Lynne Richardson - Adminis					
Facilitator	STAFF	Massimo Giannuzzi					
Participant	Arthritis Care	Mrs Jean Haines	Booking rcvd				
Participant	Cancer Research Devon	Mrs Georgina Carpenter	Booking rcvd		●		
Participant	Learning Disability Wales	Rebecca Williams - Resourc	Confirmation sent		●		
Participant	Moor Trees	Mrs Maria Kirk - Director	Booking rcvd				

An "Attendee Details for THIS event" dialog box is open, showing details for "Learning Disability Wales - Rebecca Williams - Resources Co-ordinator". It has tabs for Notes, Dates, Requests, Fees, and Food. The "Requests" tab is active, showing "Any Special Needs: Wheelchair access" and "Dietary Requirement: Vegan".

Who's using contactLINK?

CVS's

Disability organisations

Youth organisations

Health organisations

Law Centres

and more ...

as well as a number of small
front-line charities



Our clients include the following

Charities Evaluation Services	www.ces-vol.org.uk
Chesterfield Law Centre	www.chesterfieldlawcentre.org.uk
Networking Action with Voluntary Organisations	www.navo.org.uk
Norfolk Coalition Of Disabled People	www.ncodp.org.uk
North Devon Voluntary Services	
Nottinghamshire Youth Organisations' Network	www.nyon.org.uk
Patient Opinion	www.patientopinion.org.uk
Somerset Partnerships Arts Education Agency	www.spaeda.org.uk
South Hams CVS	www.southhamscvs.org.uk
Torridge Voluntary Services	www.torridgecvs.org.uk
West Devon Community and Voluntary Services	www.westdevoncvs.org.uk
Young People In Focus	www.youngpeopleinfocus.org.uk

as of Summer 2009 there were 28 organisations using contactLINK

Contact us

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www.ITsorted.org.uk



Massimo



Andy



Anne



Alan



Margot



Dominic