A Village Software Product

Technical Assistance Constituent Billing

The Frank

"In addition, we are now tracking TA assistance – something we've never done before. Those functions alone (without any of the Lending) were worth the money."

> - Debora Keller , Associate Director Genesis Community Loan Fund

With Technical Assistance* you can...

- Maintain all TA contact information along with relationship details
- Manage subsidy and funding details on all projects for which TA is provided to the constituents
- Record and track the number of hours of TA provided for various projects, including billable status
- Generate billing for constituents based on the TA provided
- Generate summary reports with flexible filtering options
- Excellent customer support
- Technical assistance & training
- Free upgrades & installation

Call us today! 800.445.3047 mimota@villagesoft.com

*The Technical Assistance module is available through a per-user pricing plan in both Microsoft Access (for small organizations) and SQL Server versions (for large organizations)

www.villagesoft.com/mimota (T) 617.695.9332 (F) 617.695.1935

OVERVIEW Technical Assistance - Constituent Billing is a powerful solution to track technical assistance provided by your organization and to bill your constituents for the service provided. **Technical Assistance seamlessly** integrates with contact management and other modules of MI-MOTA and allows you to manage all TA contact information along with relationships, notes, memos, action calls, etc. Complete flexibility in design allows you to add any number of new types and define the dropdown lists.

FUNCTIONALITY Allows you to record and track all TA information including project details such as name, purpose, type, amount, etc., project specific funding/ subsidy information, and time data. You can add any number of projects for a given constituent and edit the information at any time. Flexible but easy-to-use screens allow you to easily navigate between project details and constituent information.

ΜΙΜΟΤΑ

The system allows you to record the number of hours of TA provided to a constituent on various projects and bill variable rates based on these projects.

FLEXIBILITY Observing the diversity in the non-profit organizations in the community development and microenterprise industries, we developed a completely flexible system. The software is available both in Microsoft Access (for small and medium organizations) and SQL (for medium to large organizations) versions. Customizable fields and dropdowns allow you to seamlessly configure the software for your specific organization.

	🖼 Add / Edit Project Information		
	Client Project Name: Address: City, State, Zip	dorthea, duck. Education For All Start Date: 10/25/2003 Fifth Avenue End Date: 5/15/2004 Springfield ME 04487 County Penobscot	Convert Inquiry
Contact Information Card	Project Funders:	File As Name Purpose Applied For Amt Rec'd Type deva, ash total program organizati \$10,000 \$5,000 G	Add Funding/ Subsidy
Find by Contact ID 1183 V Find by d Name Information Prefix V		Terret Terret	
Friet / MI duck Last / Surtitle dorthea Organization TA Tribe-Indian Tov Job Title director Satutation dear Note / Attn: good donor	Project TA:	Impact Type Notes Non-profit Incorporation	Add TA Save/Close Form
Addrest Mailings Details Relationsh Technical Assistance Project List Editestion For All	Add Project	Opions Prospect Next Action Notes Tech Assistance Inquiries Opions Gold Subsidy Edit Subsidy Delete Subsidy Delete Subsidy Subsidy Data Time Data TA Add Subsidy Edit Subsidy Delete Subsidy File As Name Pupose Applied For Amt Reck Type deva, ash Intel program organizatio \$10,000 \$5,000 G Select a project to access the Subsidy, Time Data, or TA options. Select Select to access the Subsidy. Select to project	

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