



CRM Assist

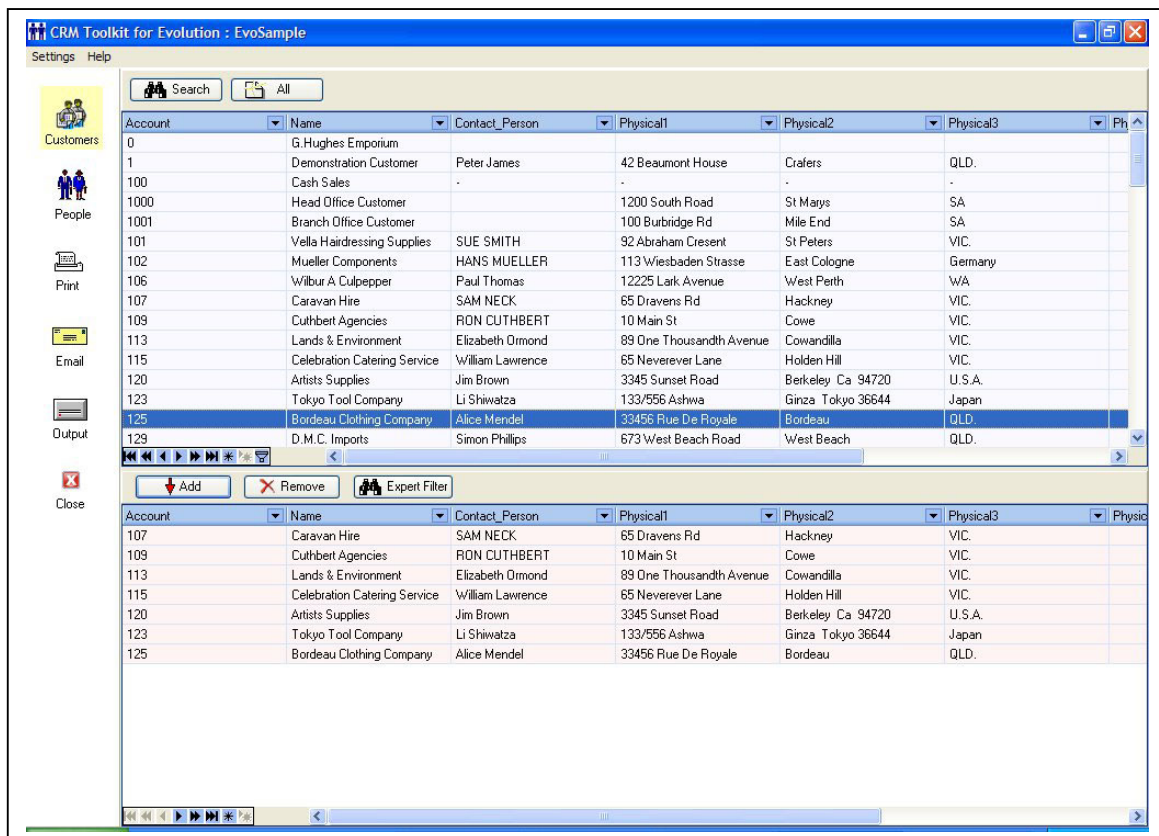
The CRM Assist module for Evolution assists with bulk marketing and communication to customers, individual contacts and sales prospects. It integrates and updates directly the CRM module within Evolution.

Bulk communication to customers and contacts is via user defined templates and can include the following:

- Printed documents
- Email
- Output file for mail merge e.g. labels

The module uses MS-Word to allow document templates to be maintained. The templates are then merged with selected customer records and can be printed or emailed.

The module will also update incidents within the Evolution CRM module to assist with tracking what documents have been sent to customers.



Overview

The CRM Assist module compliments the CRM module within Evolution. It allows document templates to be maintained and then merged with customer or contact information. Merged documents can be bulk printed or emailed.

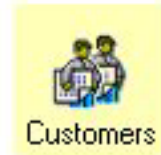
The module allows customers or contacts (from the People file) to be selected using standard Evolution filters or via an advanced filtering option. Filters can be saved and re-used at a later date.

The module allows template documents to be maintained by seamlessly integrating with MS-Word. A floating toolbar allows database fields to be inserted into the Word document which will then be merged with the selected data.

The module will also optionally update incidents within the CRM module for the selected customer or contact records. This option allows either new incidents to be created or a new action posted against existing incidents.

Key Features

- The user can quickly select customers or contacts (people) using standard Evolution grid filtering or a built-in advanced filter facility.
- The module integrates with MS-Word to maintain the document templates.
- Merge fields can easily be inserted into the Word document via a floating toolbar.
- Documents can be bulk printed or emailed. The data can also be exported for producing labels or envelopes.
- The module will update incidents within the Evolution CRM module if required to record that a document / email has been sent.



Customers



People



Print



Email



Output



Close

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