

EMAIL AS EASY AS PIE

12. November 2009

Intelligent, automated and context sensitive email integration in your CRM on Demand with CRM-Gadget.

Absolutely easy and without configuration effort.

The screenshot displays the Oracle CRM On Demand interface. The top navigation bar includes 'Home', 'Calendar', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Service', and 'Reports'. The main content area shows 'Task Detail: [Ticket 1-35345] Question about...'. The 'Key Task Information' section lists the owner as Daniel Jordan, subject as '[Ticket 1-35345] Question about hardware pricelist for 2010', type as 'Email', and priority as '3-Low'. The 'Additional Information' section shows the email content: 'Dear Adam, would you please be so kind and forward me the hardware pricelist for 2010? Kind regards, George'. Below the email content is a 'Contacts' table with columns for 'Primary', 'Last Name', 'First Name', and 'Job Title', containing one entry for 'George Smith'. There are also 'Attachments' and 'Add Attachment' buttons.



Communication channel Email - Easy and intelligent integration into CRM

Fellow Consulting AG
Ludwigstr. 21/
Theresienstr. 6-8
80333 München

Tel: +49 89 28890 571
info@fellow-consulting.de

The bigger part of communication with your customer is via email. Hence it is essential for a successful customer relationship management, to connect and automate the email communication with your CRM system. With CRM-Gadget, real email integration becomes reality. Email integration as easy as pie!

As yet, you receive an email from one of your customers regarding a sales process or a request. To manage these occurrences in your CRM, you up to now have to manually document the email in the CRM system. And relate the email to the right customer, sales- or service process. You can efficiently automate these manual tasks with CRM-Gadget. No more waste your time with tasks a software can do for you!

With CRM-Gadget email integration, you can process emails automatically and in the right context. CRM-Gadget interprets the email, automatically relates it to the right customer and the correct sales- or service process. The email thereby gets stored as an activity, related to the customer and the opportunity or service request. Just in case the customer does not yet exist in your CRM system, CRM-Gadget creates a customer automatically or after review. Furthermore, the emails you send to your customer are stored and linked to the right customer and process. So you can automatically document and trace the whole chain of communication.

The email integration is an external module for Oracle CRM on Demand. It works as an independent service via internet and requires no customization effort. Take a look at the email integration of CRM Gadget at www.crm-gadget.com.