

EMAIL INTEGRATION FOR CRM ON DEMAND

SUMMARY

- Inbound and Outbound Email integrated tightly into CRM On Demand
- Automatic association based on email address or keyword / content search
- Generate Emails from Templates
- Include CRM On Demand merge fields
- Automatic Template selection from Service Request or Activity Type

InFact Group Email Integration for CRM On Demand takes the Service Request management to the next level with inbound and outbound email management.

Business Problem

CRM On Demand users are familiar with Service Request management through the standard functionality of the solution. But email is one of the most popular communication channels and there is limited outbound and no inbound support in the standard product.

Business Solution

Email Integration from InFact Group provides users and administrators with the solution to managing Email as a support channel.

Inbound email, from support customers for example, is automatically routed to CRM On Demand. The email content is associated to the correct Contact based on email address. A Service Request is created for the issue. Additionally, content parsing can search for an SR Number or other element (for example Customer Id) to provide more sophisticated association.

Outbound email is created in the user interface in a few clicks. End users can simply generate the correct email (based on Activity or Service Request Type, or other criteria) or can pick from a list of available templates. The email is generated immediately for checking and personalization.

Administrators can create new templates and include CRM On Demand merge fields as easily as creating a document template in Microsoft Word.

The Email Integration from InFact Group offers:

- **Flexibility.** The ability to manage inbound and outbound automation
- **Usability.** Integrates quickly and easily into any supported browser
- **Customer Satisfaction.** Drive customer success with faster handling of emails
- **Evolutivity.** Add more templates as your business requirements grow

Contact Information

To learn more about our services, contact InFact Group contact@infactgroup.com or go directly to our website <http://www.infactgroup.com>.

