

For the optimal use of your CRM-system you need a perfect workflow and clear responsibilities. But sometimes it is difficult and time-consuming to guarantee this.

WorkflowIT allows you a flexible configuration of the system when required. Through the central WorkflowIT engine you can create a new activity flow easily and individually as well as you can configure existing requirements. Automate any type of process and optimize any type of human-human/human-machine-process (IT, HR, finance, sales, etc.), use your own rules and the advanced workflow.

Our **WorkflowIT**-management-system is a central tool to plan, operate and control your CRM processes.

Highlights of WorkflowIT

- **Automatism** – automatizes and standardizes workflows in ACT!
- **Connection** – Links individual activities to create complex workflow-models.
- **Creation of** marketing-campaigns, lead-management processes, sales strategies and more.
- **Configuration** - Individual configuration for every activity you want to plan.
- **Report Management** – Creation of reports.
- **Export Function** – Export of data (e.g. change of ID status creates a report).
- **Initiating event** – Observation of new or updated contacts, groups, companies and/or opportunities. If a special event occurs, the corresponding activity will start.

Example: change of a parameter in a certain field – the contact will be re-located into a special group.

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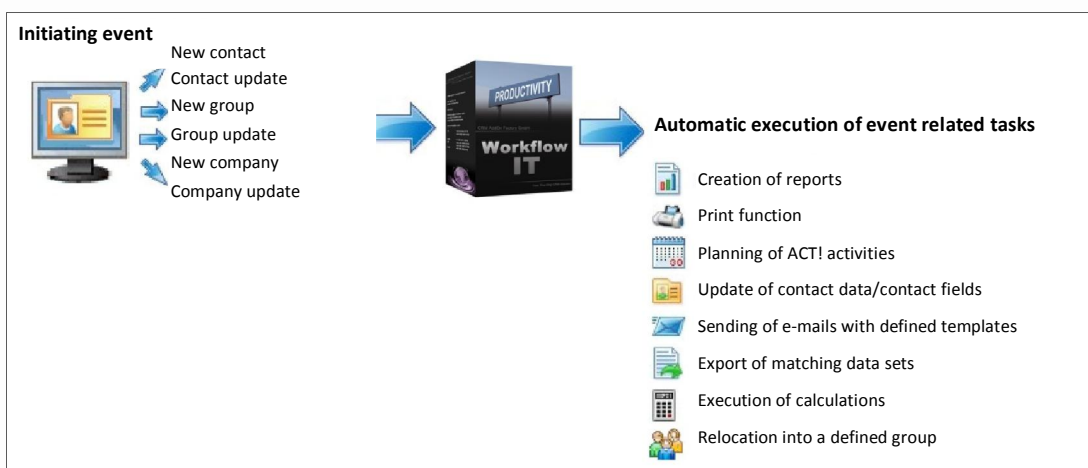
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Choice of functions WorkflowIT can manage:

- **Activities** – Creates activities in ACT! you can assign to a colleague.
- **Activities according to the status** – Plans a new activity depending on the result of the previous activity.
- **Reminder e-mail** – Sending of reminder e-mails to colleagues before a planned activity.
- **Activity observation** – Monitors tasks and forwards them to another team member or escalates to management if not completed as scheduled.
- **Relocation into a group** – Adding/deleting of contacts to/of a certain group/company.
- **E-Mail/Print** – Sending of e-mails according to the status (defined templates) and/or print functionalities.
- **Generates identification numbers** – Generating of numbers for contacts and/or opportunities.
- **Field updating** – Changes parameters of contact fields.
- **License-management** – Calculation of licenses.
- **Contact update** - Update of company contacts.
- **Export Function** – Export of data (e.g. change of ID status creates a report).

System Requirements: ACT! 10
ACT! 11
ACT! for Web



The points shown above are only a little excerpt of the functions WorkflowIT can do and standardize.

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