

# Document Recipient Manager and Related Notes

*Do you work on a project basis with several related companies?*

*Do you find that you need to store interactions with more than one company related to a specific project, lead or problem?*

Price Guide: £900 per site plus ALF

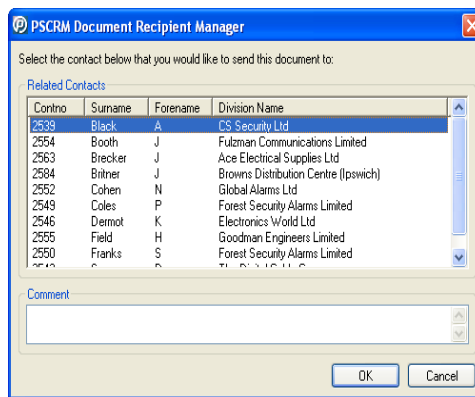
The Document Recipient Manager, together with the Related Notes plug-in, extends the existing Advanced Relationship functionality. ProspectSoft users become better informed, save time, save effort and prevent re-keying.

The Document Recipient Manager allows users to send documents from the record they are working on to on any related contact with an extremely simple user interface. The Related Notes facility gives the user the option of duplicating notes that are added to a lead via the Add Notes, Speak or Recall button to the notepad of additional, related contacts.

This makes sending quotes, emails, follow-ups, and project documents to multiple contacts simple, whilst ensuring that the relationships between the various parties are also recorded.

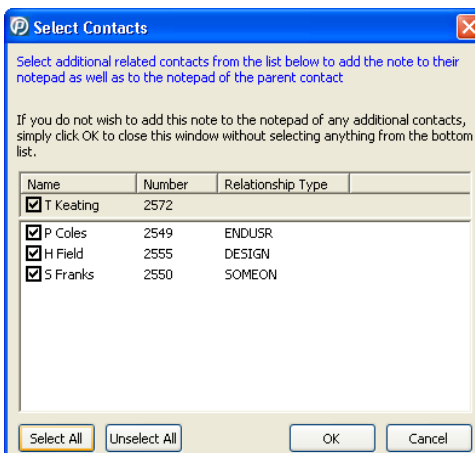
## Key Features

- Documents are automatically stored against the record under which they were created and a reference to the alternative contact chosen will be visible on the related tab.
- A document extra tab stores information about who a document has been sent to.
- The application will search for all relationships in a document's parent hierarchy,



## Benefits

- Write a report for an individual at one customer and send it to someone in a different organisation, and establish a link between the two.
- Simplifying the sending of important documents to all contacts involved in a project.



## Typical Users

The Document Recipient Manager and Related Notes XML are for:

- Companies who work on a project basis
- Suppliers to companies that tender for major construction projects or government contracts.
- Contractors and safety inspectors

## Dependencies

The Document Recipient Manager and Related Notes Option require the following ProspectSoft modules to be installed:

- B2B/B2C Contact Manager
- XML API \*
- Advanced Relationships
- Document Manager

## Related XML API Options

- Advanced Document Management
- Document Security
- Project Manager

## Additional Information

For more information about ProspectSoft CRM software developments, please visit:

[www.prospectsoft.com/crm/options](http://www.prospectsoft.com/crm/options)

This option has been developed using the ProspectSoft XML API (Application Programmable Interface)

\* The XML API module is supplied as standard with every new ProspectSoft CRM system

REF: M000-2