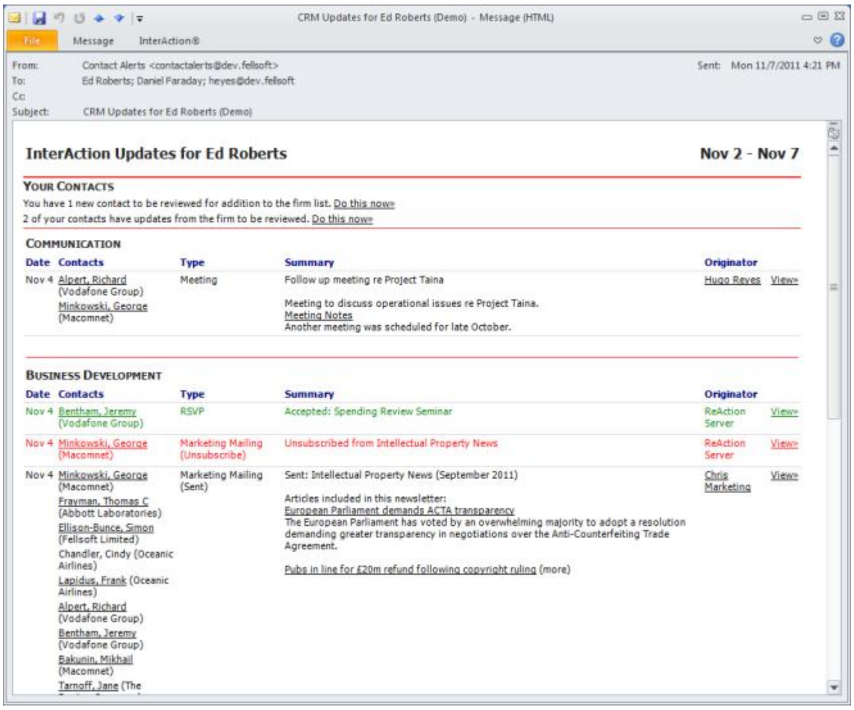
Fellsoft

Contact Alerts

LexisNexis®

Delivering LexisNexis® InterAction® updates for users in a regular, automated email



What benefits are provided by Contact Alerts ?

Contact Alerts provides professional users with their personalised Watch List updates from InterAction in a regular, automated email.

Users can now have this valuable information from InterAction delivered to them directly in a familiar, convenient and readily accessible form, allowing them to stay up to date with their contacts more easily.

A key aim of a CRM implementation at any professional services firm is to provide users with new and valuable information about the contacts they know, in order to help users strengthen and grow those relationships.

In InterAction, a key source of that information is the user's My Watch List™ page, which can show each individual user all of the activities involving the contacts which are important to them. These activities will include those created by others in the organisation such as meetings and business development events, and also those created automatically to record changes such as an updated phone number, a new email address or a change of employment.

For professional users the Watch List is a key benefit of InterAction - but without Contact Alerts there's no way to deliver it directly to them.

What information can Contact Alerts deliver?

Contact Alerts can deliver items from the user's Watch List – either all of the activities, or a subset filtered by activity type. The Watch List items can be sorted by date in the same way as the InterAction web client view, but can also be grouped by activity type or company so that items of particular interest to the user can be more easily found.

Contact Alerts selects the Watch List content for each user using the same options set by the user through the InterAction web client, in terms of which contacts are being watched, which activity types appear, and what date range is covered – so there is no need for separate or additional configuration.

Watch List items are delivered with enhanced content compared to the web client view. For example, on marketing activities relating to many contacts, the individual names of those contacts known to the user are shown, instead of just a count. This makes it much easier for users to identify which of their contacts have been sent a mailing or an event invitation.

As well as items from the Watch List, Contact Alerts emails can include a prompt for users when they have newly added contacts that should be reviewed for possible addition to the Firm List. It can also prompt them when there are pending updates from the Firm List to any of their own contacts.

An email link to the originator of the activity can be included with each Watch List item, and all items are directly linked to the related activity in the InterAction web client, helping to make InterAction more accessible to users.

How is content formatted?

The appearance of the email content is completely customisable - you can control both the included content, and the way it is formatted.

A range of standard email formats are provided which can be easily customised if required. The standard formats are designed to be readily viewable on mobile devices such as Blackberries and iPads.

How is it managed?

Professional users (or their proxies) can manage their preferences for content format and schedule via a simple web page.

All user specific options are stored in InterAction itself, so are easy to modify centrally.

What about implementation?

Contact Alerts is an entirely server based product. No additional hardware is required, and no software is required on the client.

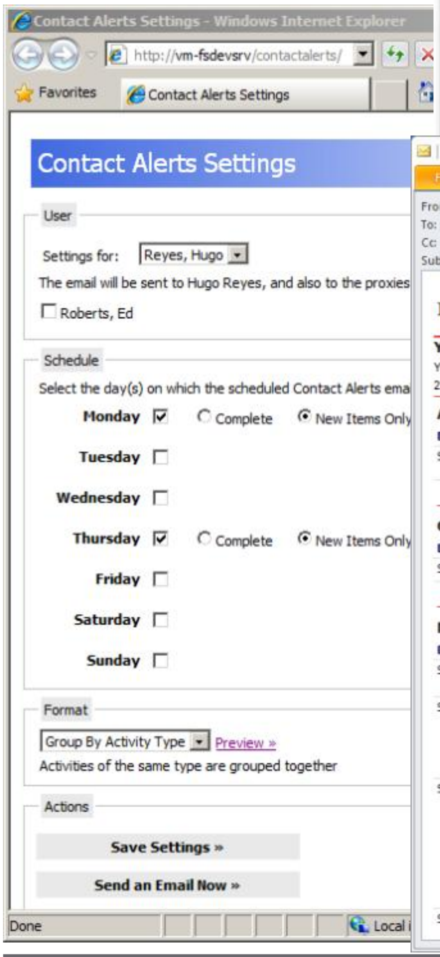
Installing and configuring the software is simple and quick. The functionality can be introduced to end-users gradually if preferred, and end-users will need little or no training.

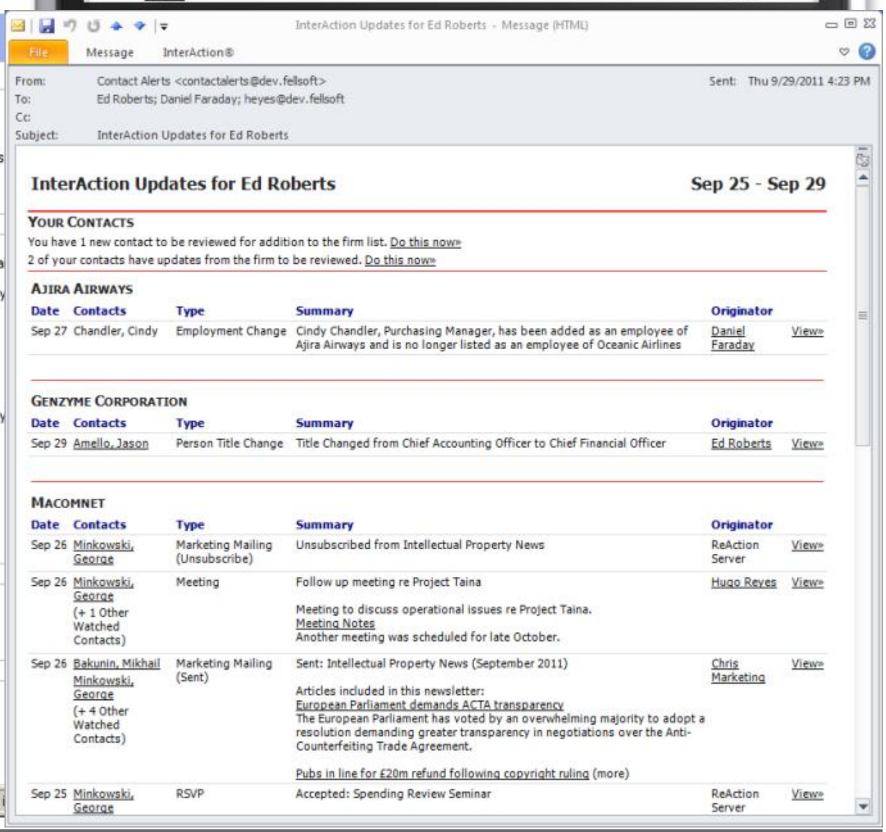
What versions of InterAction are supported?

Contact Alerts requires InterAction v5.5SP3 or later.

How is it licensed?

Contact Alerts is available on a straightforward and flexible annual subscription basis. You only need to license those users whose Watch List and My Contacts list are being monitored.





Fellsoft Limited is a Solution Partner for LexisNexis® InterAction®. For the latest information about our products or to arrange a demonstration, visit us on the web or contact Simon Ellison-Bunce:

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