

SharePoint Flex

With more than 200 features and functions that can be switched on or off depending on the needs and objectives of your business, **SharePoint Flex** gives you the power to easily integrate only the tools your team needs to get the job done.

As your business evolves, so can **Flex**. The end result is a practical, powerful and flexible **centralized business intelligence hub** – one that is packed with the tools and data your team needs to be successful.

Collective Management of Lists

- Accounts / Companies
- Contacts
- Interactions
- Opportunities
- Leads
- Tasks
- Calendar Meetings
- Custom Lists
- Read-Only Lists
- Contracts
- Projects
- Issues/Cases
- Products
- Team Activity
- Marketing Campaigns
- Language Translation
- Stand-Alone Lists
- Lookup Lists
- Audit Log
- Sales History
- Documents
- Email
- Notes
- Campaign Results
- Connections
- Embedded Lists
- Connected Lists

Outlook Plugin Features - Store, connect and share vital email interactions and attachments

- Save Email to CRM
- Convert Email to CRM Interaction
- Convert Email to CRM Task
- Create CRM Interactions
- Create CRM Opportunities
- Create CRM Contacts
- Create CRM Tasks
- Create Accounts
- Flexible Search Settings
- Create CRM Leads
- Create CRM Projects
- Copy Outlook Contact to CRM Contact
- Import CRM Contacts
- Import CRM Tasks
- Import CRM Calendar Meetings
- Import using Custom Views
- Save Attachments to CRM Interaction
- View & Edit CRM Contacts
- Automatic Flagging of Saved Email
- Save Attachments by Default
- Save Email Link to Interaction or Task
- Interaction & Task Type Tracking
- Extra Custom Field Option
- Automatic Refresh of Search Results
- Open SharePoint Site from Outlook
- Save Attachments to CRM Document Library

Standard Features & Functions

- Dashboard Views
- Quick Search
- Advanced Search & Saved Searches
- Full Search
- Create New Item Wizard
- Flexible Data Viewer
- Quick Actions (Follow Up) System & Icons
- Easy Charts, Tables and Graphs
- Connection Relationships
- Automated Document Libraries
- Document Templates
- Email Templates
- Word Merge
- Document Content Types
- Advanced CRM Settings Configurator
- Ribbon Bar Privilege Settings
- Hide List Views
- Item Level Protection
- Account Manager Change History Log
- Previous Accounts History Log
- Flexible Action Bars
- Flexible New, Edit & Display Forms
- Drag-and-Drop of New/Edit Form Fields
- Flexible Custom Menus
- Lead Converter
- People Fields link to User Profile
- Translation System
- Flexible Sub-Grid Settings Editor
- Filtered Lookup Fields
- Cascading Column Fields
- Filtered Contact Fields
- Copy-Down Field Data
- Copy-Up Field Data
- Quick Task
- Quick Meeting
- Time Tracking Rolls to Parent
- Automatic Total Field Roll-ups
- Automatic Current Opportunity Stage
- Create Duplicate Opportunities
- Related Item Quick Links
- Update Parent Opportunity Item from Interaction
- Google Map
- Linked In Integration
- Document Folder Renaming
- Inactive Contact Flags
- Move Single or Multiple Items & Records
- Move All Account Items
- Automated Next Task Date
- Upload Files
- Account & Contact Custom Addressing
- Document File Type Icon Indicators
- Color-Coded Priority and Past Due Tasks
- Collapsible Sections & Headers
- Flexible Form Sections & Header Text Color
- Flexible Multi-Choice Form Columns
- Parent Item Links within Lists
- Parent Item Links on Child Display Form
- Send Item Details Via Email
- Send CRM Contact to Outlook Contacts
- Custom and Embedded List Creation
- Multi Type Field Display Management
- Sub-Grid Custom Filters
- Sub-Grid Revenue Totals
- Automated Task Completion Date
- Automated Last Interaction Date
- Automated Item Numbering
- Convert Task to Interaction
- Rolls Total Completed Tasks to Parent
- Rolls Uncompleted Tasks to Parent
- Contact Campaign Logging
- Postpone Tasks
- Reassign Tasks
- Create Flags for Accounts & Contacts
- Copy to Clipboard
- Scrolling Multi-line Text Fields
- Create Outlook Meetings

Complementary Products & Services

- Importer / Updater
- Data Refresher
- Mobile CRM
- Advanced Filtering
- Application Support Packages
- Upgrade Subscription
- Alert Reminder
- Bulk Emailer
- CRM User Training Webinars
- Online Video Tutorials & Guides
- List Management Tools
- Agile Custom Development



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