



DATEX CRM

ENHANCED CONTACT MANAGEMENT

Leverage Your Contacts to Drive Simpler Workflows and Intelligent Automation



DEEP INTEGRATION

Contact information integrates deeply with Datex and your MRI/Yardi data, associating individuals with roles, buildings, leases and even responsibilities.



SIMPLIFY WORKFLOW

Contacts globally integrate with portfolio details based on your rules, simplifying all of your work. And global search means any contact is only a click away.



INTELLIGENT AUTOMATION

Contact associations drive Reporting Automation, Leasing Automation, Rent Due Notices, Automatic Compliance Emails and more.

POWERFUL FEATURES

- **Robust Associations**
 - Link a Leasing agent to their buildings, leases, and company.
 - Link a vendor to every property they work on and see all activities and payments made.
- **Conversation Histories**
 - Quickly capture conversations and comment histories with full context of related building, documents, jobs and more.
- **Set Reminders by Conversation and Context**
 - Email Digests notify of timely items for follow-up.
 - Filter Follow-up items by Date, Contact, or Comment Type.
- **Create Targeted Lists in Two Clicks**
 - Easily create, manage and export lists to Excel.
 - Quickly create targeted broker and preferred vendor lists.
- **Auto-Populate Forms**
 - Quick-select contacts to auto-populate key forms like Leasing Applications to speed work and reduce errors.
- **Quick Filters & Global Search**
 - Simple filters allow for customized views and inline search.



24025 Park Sorrento, Suite 300
Calabasas, CA 91302



(818) 707-9135



sales@datexdata.com
www.datexdata.com