



# 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](mailto:sales@datexdata.com)  
[www.datexdata.com](http://www.datexdata.com)