


Automate and Consolidate Data Entry

Many firms have a common problem: multiple data stores within the firm means inconsistent and inaccurate data, plus a great deal of work keeping it up-to-date. By integrating with Time & Billing and other systems, ContactEase solves the problem of consistency. However, there is still the issue of getting the right data to the right application. The New Client Entry Form addresses this.

When a new client signs up, their data is usually somewhere within the firm (someone's Outlook, PDA, etc.). However, often the data is not accessible and may not be updated once they become a client. Furthermore, how and why they became a client is important information in order to focus sales and marketing efforts (if only to send a large thank-you to the referral source!).

With the ContactEase New Client Entry Form, when a new client signs up, users enter the name and company data into this form. An immediate duplicate check is done to see if someone in the firm has already entered this data into the system and to populate it if so. Then, questions can be asked to ascertain how this client was won and how to better serve them (and to get more like them). Finally, the data is sent to time & billing, conflicts, document management, CRM and any other data store in order to have it consistent and up-to-date everywhere.

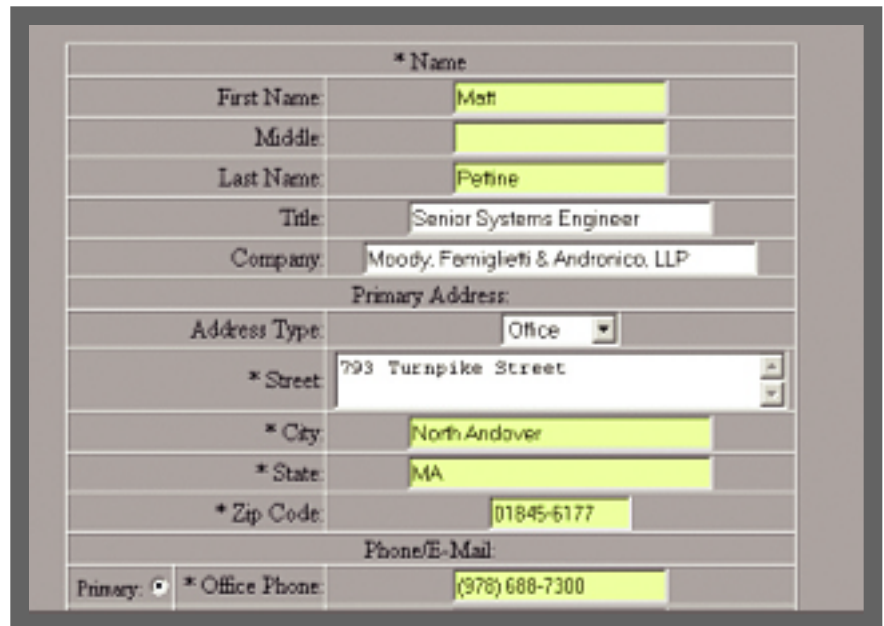


-1 matches found
Select Action Below:

Select Create new record
at this company

- Search Again
- Pettine, Matt
Moody, Famigletti & Andronico, LLP
- Create a new Record for Pettine, 793 Turnpike Street
North Andover, MA, 01845-6177
Moody Famigletti

Submit



* Name	
First Name:	Matt
Middle:	
Last Name:	Pettine
Title:	Senior Systems Engineer
Company:	Moody, Famigletti & Andronico, LLP
Primary Address:	
Address Type:	Office
* Street:	793 Turnpike Street
* City:	North Andover
* State:	MA
* Zip Code:	01845-6177
Phone/E-Mail:	
Primary: <input checked="" type="radio"/>	* Office Phone: (978) 688-7300

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