

Auto Emailing

Imagine all your follow-up emails and reminders now taken care of automatically by Docsvault! You don't need to chase customers for payment or follow up your team for a project. Docsvault can send out personalized emails to your customers or vendors based on certain rules, so you don't have to spend your valuable time sending individual emails to customers and team members.

Docsvault Enterprise Edition brings a powerful communication tool at customer's fingertips – **Auto Emailing**. Auto Emailing jobs work in the background and can be used to send out emails when a specified email rule is satisfied. This is a great feature to send out reminder emails for expiring policies, contracts, payment reminders, task follow-up or for any other purpose that is time sensitive.

Highlights

- ✓ Send out personalized emails to your customers for **common reminders or information**
- ✓ Set **reminders for time sensitive document activities** that you would like to track
- ✓ Generate rules for automatic emailing through **index values** defined on documents and folders
- ✓ **Set rules** to send out emails before or after specified days of an important date in combination with another profile value if desired
- ✓ Send out **personalized reminders** to your clients using variables, without the burden of having to manually enter fields like names, contract or policy numbers, amounts, due dates, etc.
- ✓ Attach **relevant documents** dynamically

Solutions

- **Save time and cost**
Docsvault Auto Email Sender helps users to save time and efforts on mundane activities such as sending out reminder emails and follow
- **Better Customer Service**
Sends out regular emails to customer for renewal, upgrades etc. thus leaving nothing to chance.

What It Means For You?

Sending out follow-up emails and reminders manually is not only frustrating and inconsistent but also time-consuming. Let's assume it takes five minutes to search client details and another five minutes to write out personalized email following up for payment or contract renewal. Ten crucial minutes are spent for a task that is unproductive yet very important. Multiply it by the total number of such emails to be sent out even in a small business and the numbers are astounding.

This valuable communication feature can radically reduce the time spent on mundane and unproductive activities like sending follow up and reminder emails.

Set Scope and Rules of Email Sender Job

You can narrow or widen the scope of email sender job as desired. Simply select the scope documents, specify date and index rules, and define a schedule for the job to run. Customize the emails to personalize them and Docsvault will take care of the rest.



Fast Facts

1. Auto Emailing offers traditional email functions plus the ability to send out emails on schedule, attach relevant documents dynamically and personalize emails with specific names, dates, etc.
2. Allows only users with administrator rights to create Auto Emailing jobs for authorized email use
3. Personalize email content using templates

For More Details, visit:
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