

**Ease Secretarial
and Organizational Tasks
with Microsoft® Office**



eSecretary®

Correspondence Automation and Management Solution

Increase Efficiency | Enhance Productivity



Correspondence Automation and Management Software

eSecretary® is a Correspondence Automation and Management Software that seamlessly integrates with Microsoft® Office. It helps in managing secretarial and organizational tasks, thus increasing efficiency and enhancing productivity in the office environment.



Contact Management

- ❖ Profiles contacts, assigns multiple categories and lists in multiple ways.
- ❖ Facilitates any type of document attachment with the contact.
- ❖ Assigns unique contact ID for easy referencing.
- ❖ Imports contacts from Microsoft® Outlook ignoring duplicates.
- ❖ Exports contacts to Microsoft® Excel.



Correspondence Automation with Microsoft® Word

- ❖ Builds draft of the letter with recipient's address and body text using templates.
- ❖ Saves letters automatically with unique document number.
- ❖ Automatically attaches information related to contact and template, enabling instant retrieval.

Email Management

- ❖ Enables archiving of important emails for the organization's record.

Email Templates for Microsoft® Outlook

- ❖ Creates email templates from existing emails with ease.
- ❖ Assigns unique ID to each email template.
- ❖ Facilitates selection of email templates while replying and drafting emails.

Log Record of Correspondence

- ❖ Incoming Letters, Physical or Electronic can be recorded..

Correspondence Status Tracking

- ❖ Assigns, tracks status and facilitates remark addition.
- ❖ Retrieves correspondence for a particular status.

Quick Retrieval of Past Correspondence

- ❖ Retrieves correspondence for a particular contact instantly.
- ❖ Retrieves correspondence for any internal or external reference number.
- ❖ Lists current (today's) correspondence and documents instantly.
- ❖ Lists correspondence for a specific period.
- ❖ Retrieves the correspondence based on multiple parameters.



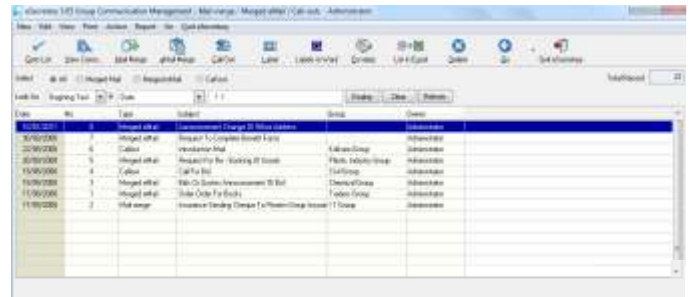
Template Management

- ❖ Profiles templates on the basis of subject matter, category and provides description.
- ❖ Assigns a unique template ID for quick reference.
- ❖ Enables quick creation of templates from documents.
- ❖ Prompts for selection of a template while creating a document.
- ❖ Prints list of templates for easy referencing.
- ❖ Facilitates activation/deactivation of templates depending on day to day requirements.
- ❖ Imports and exports templates for sharing with different offices/branches.

Group Communication Management

- ❖ Simplifies mail merge and email merge with Microsoft® Outlook.

- ❖ Creates groups of contacts for mail merges/ email merges and call outs.
- ❖ Prompts user to choose a template for mail merge and email merge.
- ❖ Builds record of each mail merge/email merge /call out done for re-use and reference.
- ❖ Prints labels and envelopes for the mail merge done.



Greeting Management

- ❖ Keeps record of special dates i.e. birthdays, spouse's birthday, anniversary dates etc.
- ❖ Reminds about greetings due for the day, current week, current month, etc.
- ❖ Automates the process of generating greeting letters.
- ❖ Simplifies mail merge and email merge to generate greeting letters and emails.
- ❖ Prints labels and envelopes for greeting letters.

Labels & Envelop Printing

- ❖ Prints mailing labels in predefined size and desired quantity for the selected contacts.
- ❖ Prints mailing labels of custom size with Microsoft® Word.
- ❖ Prints labels/envelops for the correspondence at one go.

Advantages

- ❖ Improves “self correspondence” skills
- ❖ Quicker production of quality documents
- ❖ Simplified and incremental back up
- ❖ Improves security of documents
- ❖ Assists new entrants in learning skills faster
- ❖ Helps in quicker handover of work
- ❖ Helps in relationship building
- ❖ Helps to have less-paper-office
- ❖ Saves time and money effectively

The screenshot shows a Microsoft Word document titled "Doc No.16 - Monitor Sales Efforts More Effectively [Compatibility Mode] - Microsoft Word". The document content includes:

- Reference number: Ref. No. Cust/16 01-07-2010
- To: M/s India Fintrade Ltd., 1410, Maker Chamber 5, Nariman Point, Mumbai - 400 021 (INDIA).
- Subject: Monitor Sales Efforts More Effectively
- Dear Sir,
- Every sales opportunity will become more crucial and valuable during the tough time ahead and hence needs effective monitoring of the whole sales efforts from opportunity generation to winning the sale.
- Our proven Sales Lead Tracker software will help your organization to track and monitor sales efforts more effectively.
- What Sales Lead Tracker does?**
 - Manages suspect/prospect/customer information
 - Creates & Monitors Mailer, emailer & Tele Campaign or combination there-of
 - Print Mailing labels & envelopes at one go
 - Organize Marketing Collaterals, Presentations & Communication Templates
 - Tracks & Automates correspondence generation including emails
 - Monitor Sales Leads & Related Sales Activities till you win or loose the sale
 - Automates-Quotation Creation Process (Basic Module)
 - Prompt for follow up due and reports missed follow ups
 - Manages all documents/correspondence and emails more effectively
 - Financial Reports, Sales Mix & Sales Forecasting

Annotations on the screenshot:

- "Saved automatically with unique document number" points to the document title bar.
- "Automatically system generated" points to the reference number.
- "Picked automatically from contact database" points to the recipient address.
- "Picked automatically from the template library" points to the subject line.

Quote in a blue box: *A few clicks is all it takes to draft a letter with auto saving*

Quote in a white box: *"Letters are among the most significant memorial a person can leave behind them"*
- Johann Wolfgang Von Goethe

Email Productivity with Microsoft® Outlook

Do these questions sound familiar in your office environment?

- ❖ Where do you save important emails to create records for the organization?
- ❖ How do you store important emails with other documents of the organization?
- ❖ How do you retrieve an important email received years back?
- ❖ How do you provide your email access to colleagues when you're not around?

Knowledge workers get stuck when Microsoft® Outlook rules do not help much in dealing with email issues. eSecretary® plug in for Microsoft® Outlook, provides simple solutions for email archiving and creating records for organization.

These solutions not only help in archival of important emails with other office documents but also provide innovative solutions for email template management that makes creating and replying emails faster. The following list highlights some pain points and solutions there-of.

- ❖ Plug-in sits into Microsoft® Outlook and works well with the same.
- ❖ Archives important emails with options either to move or copy.
- ❖ Creates centralized repository of emails with other documents.
- ❖ Contact centric communication including emails are at one place.
- ❖ Captures templates from existing emails with/without attachments.
- ❖ Simplifies drafting and replying emails by using email templates with/without attachments.
- ❖ Creates Excel sheets to print email records.



Microsoft Outlook interface showing the eSecretary plugin. The interface includes a menu with options like 'Archive', 'Templates', and 'Add Masters'. A context menu is open over an email, showing options like 'Copy to eSecretary', 'Move to eSecretary', and 'Copy as Template'. The main window displays an email from Hanumant Reddy (HIL) with a subject 'eSecretary - Correspondence...'. Below the email, there is a section for 'Correspondence Automation and Management Software' with the eSecretary logo and a description of the software's features and benefits.



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*"While technology and processes
are important to Knowledge
Management, it is people who
determine success."*

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