# CRM

Customers · https://mountainstream.co/docs/crm-event-management-in-streamline/

## Customer Relationship Management

Streamline has a built in CRM that not only saves you time managing an external one, it also saves you money - it is part of the package.

Set email reminders for upcoming events.

Send samples from the Cart by clicking on the gift icon. The samples are automatically recorded in the CRM. If no orders are received within three days of sending the samples, the customer will be sent a reminder email and you will get a blind carbon copy. After seven days, if still no orders, we will remind you to follow up.

Recording other events like complaints, appointments or meetings is easy. Fields auto populate with data from the database, for example, contacts, addresses and so on.

Share your events with other members of the team and quickly filter reports by even type, customer or date.

Learn more about Customers and Ordering of Streamline ERP.

[A screenshot of a computer displaying samples complaints & reminders on the screen.]

Get Started