Customer Relationship Management (CRM)

TaskWise™ is a business software innovation that combines the vital functions of task management, relationship management, exception management, and information sharing into a single company-wide system that integrates with your financial data. Its purpose is to enable you and your coworkers to work smarter and more efficiently with access to the information you need to do your job in an excellent way.
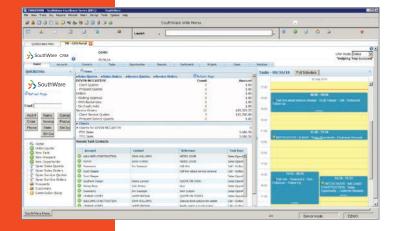
Benefits

- **Customers and partners get better service and follow-up**

Management and staff can focus on:

- **What tasks need to be done and why**

- **Who needs to be involved**

- **When tasks need to be completed**

- **Business exceptions and follow-ups are identified, tracked, and resolved on-line**

- **Manage daily work through one convenient portal that provides access to all programs in the SouthWare system**

- **Task and exception management are automated to make your system smarter and simplifies oversight**

- **Communication with employees or groups of employees is facilitated by using (TWIC) TaskWise™ Integrated Communications instant messaging and discussion forums**

Much more than just a basic CRM, TaskWise™ offers integration to all aspects of your SouthWare business system, allowing you to setup and manage all relationship data, both internal and external. TaskWise™ CRM puts everything in one place, eliminating the need to run multiple systems. TaskWise™ also includes integrated instant messaging and discussions, allowing you to communicate with other employees in real-time, across the office or around the globe.

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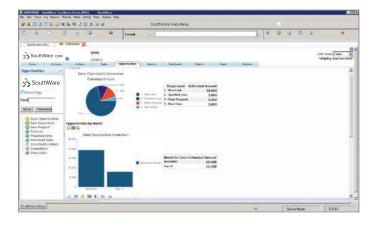
FEATURES & FUNCTIONALITY

Imagine logging into your computer in the morning and seeing a summary of what's going on in the company. You click on a list of the tasks that have been assigned to you or your department. You take care of a couple of the items by clicking on a button to access the related financial software program for the task. You decide to forward one of the tasks to a co-worker and send an accompanying e-mail.

Next you check your department's alert list, situations that you told the system to watch for and give notification when they occurred. You zoom to the accounting data behind a couple of the alerts for more details. The alerts automatically creates tasks for the responsible individuals so you don't need to take further action.

You return a couple of calls to clients and one to a vendor, make notes, and generate a couple of related e-mails and one follow-up task (with an RSVP so you'll automatically be notified when it's done). You're not sure about a company policy question during one of the calls so you look it up in the on-line AnswerReady database, and text a co-worker for clarification with the built-in TWIC messaging and discussion system.

Later that morning you check the alert list again and see that all but one of the previous alert situations have been addressed but there are now two new ones. In the afternoon you continue to work your task list and zoom to supporting functions as needed. You add a new alert test so the system starts looking for a new potential problem that has come to your attention. You add a policy decision to the on-line database for future access by everyone, and start a discussion topic to gain input from senior staff.

At the end of the day you have the satisfaction of knowing that you worked on the right things and got a lot done. You also go home with the confidence that your system continues to work, looking for the issues that need your attention tomorrow. The scenario above only touches on the vision of what you can do with TaskWise™ CRM.

KEY TOOLS YOU'LL HAVE WITH TASKWISE:

- Integrated relationship & contact information is linked together in TaskWise™ and with all related business data in the SouthWare Excellence Series™.

- Task scheduling/management - scheduling, creation, forwarding, follow-up, closing options for tasks such as calls, appointments, to do items, etc.

- Alerts - the system can scan through any SouthWare data for any exception conditions you want to identify - option to generate related tasks for follow-up.

- AnswerReady™ - reference database with search and an interactive table of contents.

- Powerful supporting functions - automated scripts with variable text, literature fulfillment, projects, task instructions, many more.

- Optional interface to Microsoft Outlook to replicate data to Microsoft Outlook and create tasks from Microsoft Outlook emails.

- Web access to TaskWise™ data via the CRM mobile portal.

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