



integraSoft

TAN – Tasks, Activities, Attachments, Appointments and Notes



Sell More
Lower Costs
Improve Customer Satisfaction
Reduce Errors
Get Paid Faster

TIME IS MONEY

360° customer management will enhance your relationship with each customer and save valuable time with Tasks, Activities, Attachments, Appointments and Notes (TAN). Now available in integraERP Premium Solution Pack and integraRep Premium, businesses can organize tasks, document customer files, manage appointments have quick easy access to up-to-date customer information. Empower employees to act quickly throughout all departments of your company.

TASKS

- Sales representatives can enter a task in a customer file at customer site or back at the office.
- A task can be assigned to other employees with options to indicate priority – instantly other departments can reply and support any task for the customer.
- Task can be marked completed once task has been satisfied and serve as a history of actions in customer file.
- Personal notifications when tasks are assigned, completed or alerts to upcoming deadlines allows businesses to improve pipeline management.

ACTIVITIES

- Gives your company a comprehensive view of actions completed for a customer. Employees from many departments have the same view of every activity for the customer.
- Information entered by an employee remains in the customer account for the life of the account.

ATTACHMENTS

- Easily attach documents, pictures, order, purchase order and more to customer file.
- Attach items such as insurance, agreements, contracts and design/media files to ensure customer documents are quickly accessible.

APPOINTMENTS

- Scheduling appointments and viewing calendar across the business aids in managing time efficiently.

NOTES

- Employees have the option to leave specific notes detailing interactions with customers visible to others.



Business Software for your Growing Company

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