

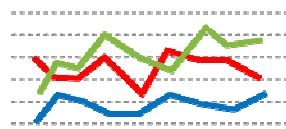
Activity Management

Process Maps



Respond to Calls with Confidence

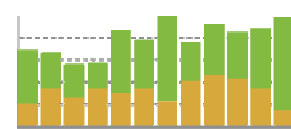
When you get a call you can quickly review the account and see who else at your company has been working with them. You can then use NET-CRM to capture call notes and create a follow-up task if need be.



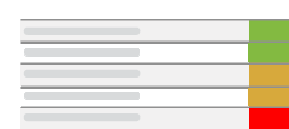
of Calls



Sales



Customer History



Follow Up Tasks



You Receive an Inbound Call

- Customer has some questions
- Prospect finally calls you back
- A call is transferred to you from a coworker



Search Salesforce

- Last name
- Phone number
- Company name
- Account number
- Email address
- CTI integration



Find Contact

If contact doesn't exist, create a new contact in Salesforce



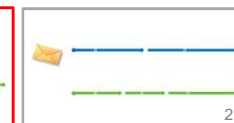
Review Account Information

- Open tasks
- Activity history
- Opportunity history
- Case history



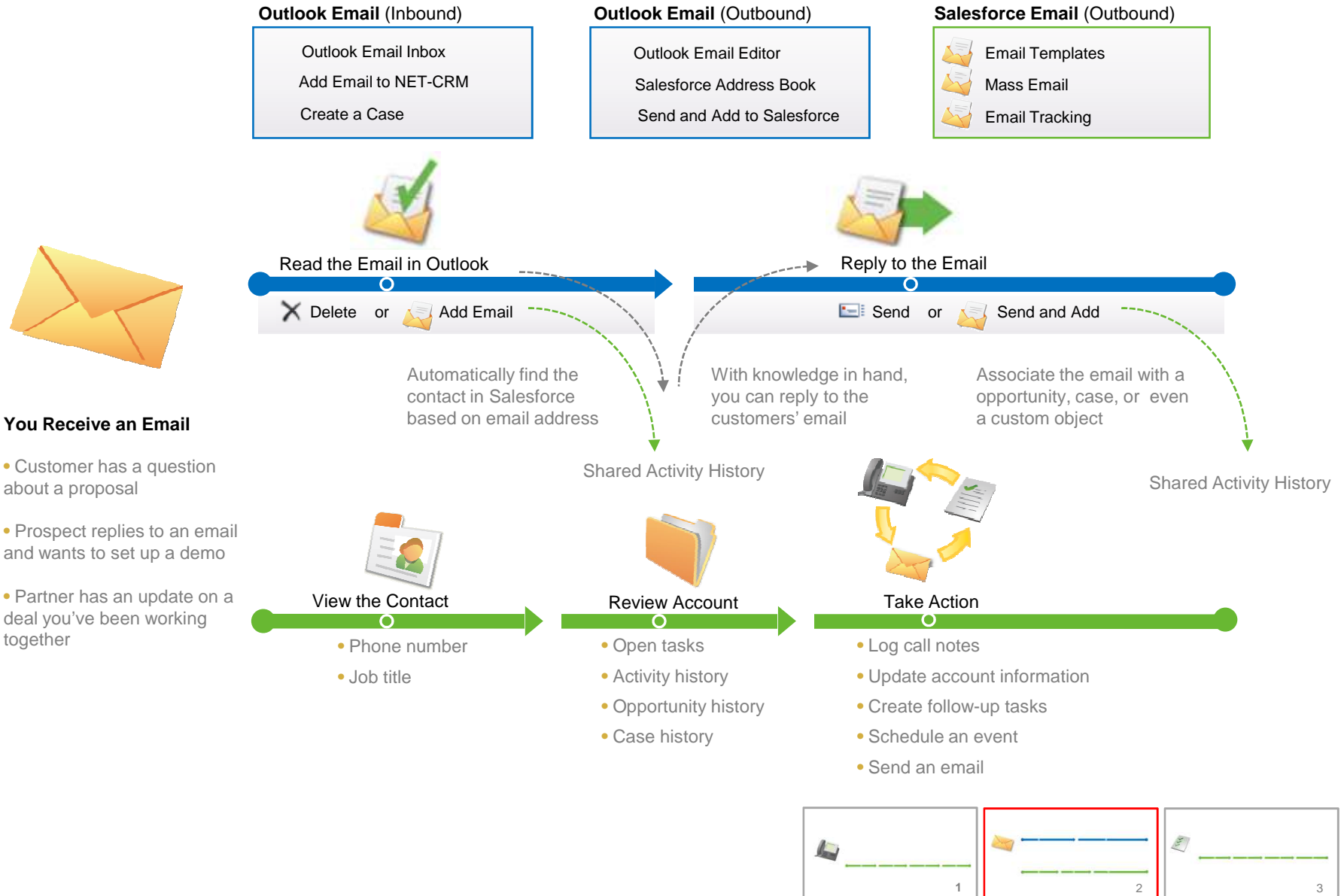
Take Action

- Update information
- Log call notes
- Create follow-up tasks
- Schedule an event
- Send an email



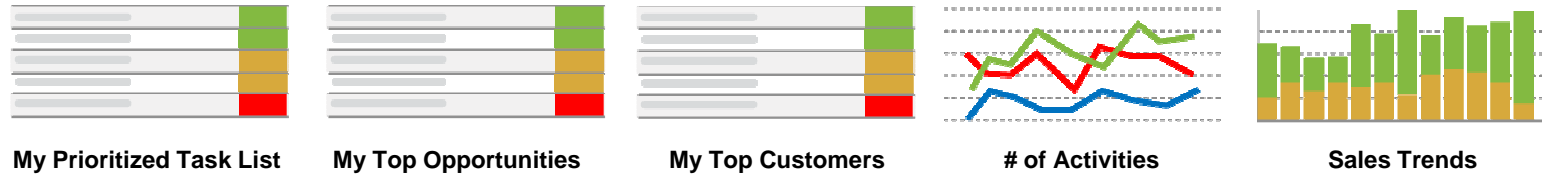
Connect with Outlook and Capture Important Emails

You can use Outlook email to communicate with customers while easily capturing everything in NET-CRM at the same time for organization-wide visibility. Add incoming or outgoing Outlook emails to the appropriate record in NET_CRM with a single click in Outlook.



Manage Your Tasks and Follow-Up Activities

Coordinating customer-facing activities is a critical part of closing business and managing customer relationships. NET-CRM activity management capabilities help keep your team organized and working together so your customers receive the attention they need.



Manage Your Task List

- Follow-up reminders you set for yourself
- Tasks assigned to you by a colleague
- Tasks automatically assigned to you based upon a workflow rule or an automatic trigger

