SALESPAD®

CASE TRACKER

Making the case for improved issue management.

FOLLOW YOUR CUSTOMER'S ENTIRE ORDER-TO-CASH JOURNEY.

What is Case Tracker?

The Case Tracker module is the most effective way to track any customer issues that might pop up. Easily keep detailed notes on every interaction you have with a customer, and link all relevant notes and documents to each issue case to keep your information organized and quickly accessible.

Case Tracker should be used if:

- You frequently work directly with customers
- Customer relationship management often requires input from more than one department/employee
- You currently spend more time tracking down customers' information than you do resolving their issues

What does Case Tracker look like in action?

Case Tracker is designed to help you help your customers. Customer requests take all different forms, and each issue is totally unique, which means you need to stay organized if you're going to wow your customers with your responses. Case Tracker shows you the entire timeline behind that customers' issues and needs, giving you the heightened visibility you need to not only resolve their current demands, but to identify trends and readjust your processes in order to avoid these same issues in the future.

With Case Tracker, you can:

- Generate a reorder or return with ease
- Track issues and resolutions from beginning to end
- Assign specific users to cases to avoid confusion
- Attach additional documents, item notes, and past customer requests to issues

How does Case Tracker help shape my CRM strategy?

With Case Tracker, you can diagnose any recurring problems by tracking how, where, and when they occur. By creating as many unique issue, cause, and resolution codes as you need, you can monitor what's causing customer issues in the first place, determine what the best resolutions are, then take the steps needed to improve your processes.

FACT SHEET

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