Contact Manager

Time is money, and money is time! Save both by utilizing our Integrated Contact Management solution. This feature rich product was designed specifically for the financial services industry to streamline and automate customer service and support, marketing and sales efforts. Enable your sales staff and lenders to manage opportunities, set tasks and appointments. Empower your customer service representatives or call center associates to improve customer satisfaction by responding more quickly and accurately to incoming requests by easily logging, assigning, researching and maintaining service requests and queries like never before.

Integrated Contact Manager creates a full historical accounting of all customer communications, whether originated by the customer or the bank, and saves it to our powerful, centralized database, permitting quick access and easy retrieval of information where and when you need it. Never before has it been so easy to get immediate attention for your customer's needs and enable you to monitor the effectiveness of the actions taken by your staff for satisfactory resolution, and to ensure a consistent customer experience.

The built in contact management feature gives your managers and supervisors the ability to view and manage all pending contact history postings at a glance. From this screen, managers can quickly sort and view contact history based on application, account number, details, assigned user and category for which the contact histories pertain. Also, your manager or supervisor can even re-assign contact history to other users and departments as needed based on employee availability or expertise.

In addition, customizable reporting is available within Contact History to provide you with detailed or summarized information in order to help you better understand and intelligently track your customers and their needs. Contact History management is one of the most important and powerful tools an institution can utilize to help assess, plan and manage their customer service.   Empower your institution and staff to keep track of clients, issues and tasks by leveraging an instant, unified view of each customer including all interactions input through multiple channels.