



Vigilant for Basics Features

## CUSTOMER RELATIONSHIP MANAGEMENT

Features of Vigilant for Basics Customer Relationship Management software:

- User defined action codes to describe the activity
- Log and track any activity within your company you decide is important – sales, support, marketing, collection and follow-ups are some examples.
- Employee, date and time sensitivity to record the notes
- Both summary short note and detail note per entry
- Incident numbers to log same-issue multiple notes from the start of a project or activity to the end
- String search ability to find specific references within the entire contact database
- Find and report:
  - incident numbers
  - type of action
  - one or all employees
  - one, all or a range of customers
  - by date
  - by customer type
- Print a peak performance report or summary statistical report