



Partner

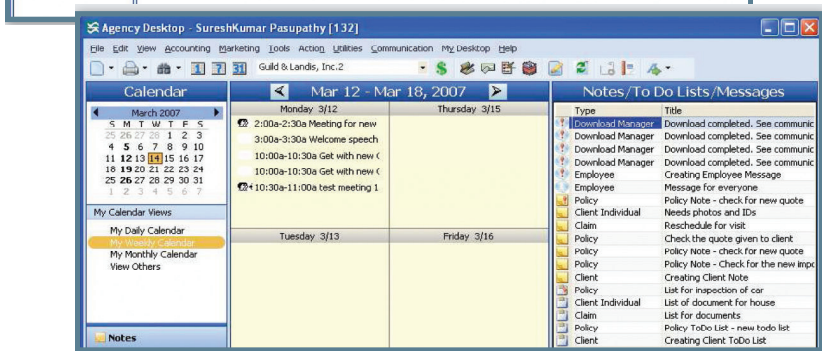
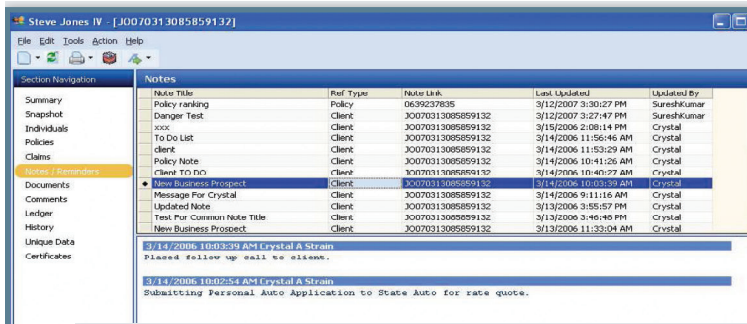
Partner XE™ Notes/To Do Lists/Messages

*Easy Navigation, Quick Carrier Connections
& Best in the Business Outlook Integration*

Communicate goals, tasks and time lines to your entire team. Everyone has access to the same document making it easy for all to see each stage of the process as it is accomplished.

Coordinate Your Efforts With Notes/To Do Lists/Messages

The **To Do Lists** feature allows you to create a default template as part of a Note to standardize a list of workflow procedures. This ensures that everyone is following the same processes to help eliminate errors. You can check off the items on the To Do Lists as tasks are completed. Each task is then time and date stamped once completed and stored in History within the To Do Lists Note for reference.



The **Messages** function allows you to send general agency messages to other users that are not attached to a particular Client or Policy. Messages can be deleted. In contrast, Notes are attached to a Client, Policy, Individual, Contact or Claim, and they cannot be deleted for E&O protection.

Within a **Note**, you can assign it to someone else, set a priority level, set reminders, email the note through your existing email application, etc. Notes are time and date stamped, and the history continues to track within each Note.

All can be sent to Microsoft Outlook® and added as appointments – giving you a, unified, comprehensive, and portable calendar.

Manage Workflow

Contact SIS Today!

1-800-747-9273

sales@sisware.com



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