

CaseView

A workflow management application designed to run on the IBM i platform

Business process management with automation - whether known as workflow, customer relationship management (CRM), work management, case management, call centre management, help desk, service centre management - is an intrinsic part of most organisations today.

Whatever it is known as within your organisation, **CaseView** is the tool to use.

CaseView is a CRM / workflow management system that runs on IBM i and is designed to provide not only a centralised point to record any ongoing customer activities, but also a complete and customisable set of escalation and reporting procedures.

Flexibility

The flexible screen design of **CaseView** means that it can be used for CRM and workflow across a wide variety of industry sectors - from a sales activity to an insurance claim tracking process, or engineering plant maintenance.

Most tasks have a number of key pieces of information that have to be recorded, routed, prioritised, activity added, allocated or escalated.

Tailored and scalable

CaseView's administrative functions allow you to tailor the system, not only to your organisation, but to the way different departments, teams, user groups and individuals need to use it.

Any number of **CaseView** systems can run at the same time if necessary – each one tailored to a specific function performed within your organisation.

Efficient workflow management

All cases can be automatically recorded, prioritised, and allocated to individual employees simply and efficiently. **CaseView** has facilities, which sequentially add information to a case as it progresses; prioritise tasks; alert the individual(s) involved and/or their supervisors whenever specific time limits are exceeded.

Compatible with historic applications

CaseView is designed to complement your organisations existing applications – they can be simply integrated – allowing any of your database information such as customer numbers or account codes to be used as the key to the case reference for each customer.

Additionally, any activity taking place in your existing applications can act as a ‘trigger’ for information to be updated in **CaseView**.



Some key benefits workflow management can bring to an organisation:

- **Increase customer retention**
- **Improve staff efficiency**
- **Centralised management of all customer information**
- **Control the balance of staff activity**
- **Provide a workflow interface to existing applications**