



Do More With Work Trail

Seamless Collaboration

Work Trail provides a seamless interface for users to improve collaboration. Create notes with different types, statuses, and background colors. Easily view notes for related records.

Customize tasks to display for different types of records. Display different Task Sets for a record as it moves along its lifecycle.

Increase Productivity

Log notes to keep track of work that's been performed, or roadblocks encountered. Keep things running smoothly by adding dynamic tasks to any record.

Improve Project Management

Use Work Trail to enhance your project management process and improve team collaboration. Works with project management apps like Milestones PM+.

Display Notes From Related Records: Configure the child object notes you want displayed at the parent object level. Display notes from Cases, Opportunities, and other standard/custom objects at the Account level. This way you can achieve a holistic view when visiting a parent record.

Enhanced Notes: Create and customize notes by type, status, and background color.

Pin Notes: Keep important information top of mind.

Custom Task Sets: Define which Tasks should be performed for various objects and/or types of records. Once task sets are configured, mark them complete with just a single click!

For Any Salesforce User: Sales, customer support, marketing, or your entire organization.

First Five Users Free

Free for up to 5 users. Additional user licenses may be purchased at \$15 per user a month.