

Project Collaboration

Improve project success with TaskRay's Salesforce-native collaboration. Boost visibility and accountability on project statuses and tasks across stakeholders, including management, cross-functional teams, vendors, and customers.

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INCREASED ACCOUNTABILITY

Proactive external collaboration drives accountability and customer satisfaction.

TStreamlined task consolidation, customized insights for stakeholders, and clear communication trails ensure exceptional customer experiences, fostering growth and lasting success.



IMPROVED EXPERIENCES

Deliver more project context and visibility to your team and get results.

A successful project environment relies on collaboration. Complete visibility and access for all teams improve task completion, troubleshooting, customer experiences, and business growth.



Deliver the perfect level of context externally.

Provide detailed project information and workflows for managing stakeholder tasks. Ensure everyone knows who is doing what and when to foster collaboration and efficiency.

Enhancing visibility creates stellar customer experiences.

External stakeholders are crucial but often lack Salesforce access. Features like Public Dashboards, Digital Experiences, and Email Notifications keep them informed about project status and tasks.

Increase project success with ownership and accountability.

Drive growth and revenue, while external ownership and accountability motivate your team for timely task completion and effective troubleshooting.

Other Great Features



PUBLIC DASHBOARDS

Allow customers or partners to easily view project details in multiple ways throughout the project lifecycle.



EXTERNAL OWNERSHIP & COMPLETION

A resource-maximizing middle-ground to Salesforce Communities allows similar collaboration capabilities with external partners.



CUSTOMER FEEDBACK FORMS

Gather information from your customers and gain better awareness of their onboarding experience with customer feedback forms.



DIGITAL EXPERIENCES

TaskRay can be used in a Salesforce Digital Experience Site so external users can access the application and participate in projects.



EMAIL NOTIFICATIONS

Alert customers or partners via email with a list of to-dos. They can even mark a task complete with a single click.



IN-APP NOTIFICATIONS

Use default in-app notifications or create custom notifications to alert your team to critical events.



CHATTER

Communicate with your team members, share and access files, and track when specified fields are updated on TaskRay records.



FOLLOW ACTIVITY

Choose to follow activity on specific projects or tasks or opt-in to auto-follow activity.



Excited about future TaskRay capabilities?

Discover upcoming features on our horizon and have a say in what comes next!

[EXPLORE OUR ROADMAP](#) ➔

Want to see TaskRay in action?

Our Salesforce-native onboarding solution is easy to implement and user-friendly. Talk to a TaskRay expert to keep teams and customers connected and on track during critical initial moments.

[BOOK A DEMO](#) ➔



With hundreds of 5-star AppExchange reviews and recognition from G2 as a High Performer and Momentum Leader, TaskRay is a trusted partner to help you achieve successful outcomes.

TASKRAY

The #1 Salesforce-Native Work Management Solution

