

Task Management SOLUTIONS

Germane CRM offers the ability to set up and monitor automated tasks that will allow your staff to work and communicate more efficiently.

- Set up different types of tasks, each with their own business rules
- Assign one or multiple people to any task
- Automatically email people when they are assigned a task
- Easily filter tasks by who they are assigned to and due date
- Track emails and other internal notes related to a task
- Include people outside your organization using the Lite portal
- Set up an email mailbox to automatically handle task creation and correspondence
- View the list of open or completed tasks for any employee with due dates

Send a Catalog Out

Type: Send Out Literature

Priority: Medium

Status: Open

Created: 11/17/2013

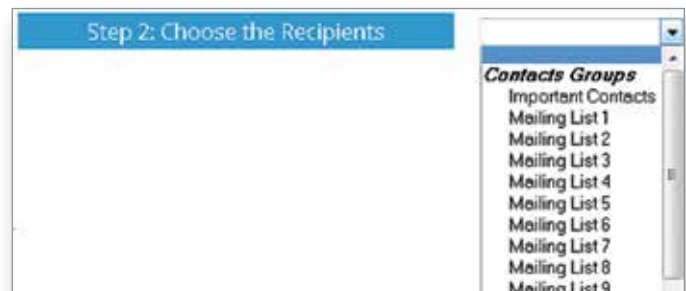
Due: 11/30/2013

Description:

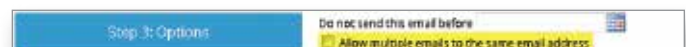
Please send out a catalog to this customer with the latest sale flyer.



The screenshot shows the 'Send Bulk Email' configuration window. On the left, there are five steps: Step 1: Choose the Email to Send, Step 2: Choose the Recipients, Step 3: Options, Step 4: Preview the Emails, and Step 5: Send the Emails. The main area on the right shows 'Very Important Email' selected, 'Owned by Mathieu LaPalin', and 'Important Contacts' selected. There are checkboxes for 'Do not send this email before' and 'Allow multiple emails to the same email address'. A 'Preview' button and a 'Send' button are at the bottom.



The screenshot shows the 'Step 2: Choose the Recipients' interface. It features a list of 'Contacts Groups' on the right side, including 'Important Contacts', 'Mailing List 1', 'Mailing List 2', 'Mailing List 3', 'Mailing List 4', 'Mailing List 5', 'Mailing List 6', 'Mailing List 7', 'Mailing List 8', and 'Mailing List 9'.



The screenshot shows the 'Step 3: Options' interface. It includes a checkbox for 'Do not send this email before' and a checkbox for 'Allow multiple emails to the same email address'.



The screenshot shows the 'Links' interface. It includes a checkbox for 'Convert website links into trackable links'.

Subject	Sent To	Date	Last Viewed	Last Viewed IP
Very Important Email	 Mathieu LaPalm	1/31/2013 4:12:00 PM	1/31/2013 4:12:00 PM	
Very Important Email	 Mathieu Test	1/31/2013 4:10:00 PM		
Very Important Email	 Mathieu LaPalm	1/31/2013 4:10:00 PM	1/31/2013 4:12:00 PM	
Very Important Email	 Mathieu LaPalm	12/15/2012 5:51:00 PM	12/15/2012 5:51:00 PM	
Very Important Email	 Mathieu Test	12/15/2012 12:37:00 PM		
Very Important Email	 Mathieu LaPalm	12/15/2012 12:37:00 PM	12/15/2012 12:49:00 PM	

Tasks Closed

Number of Tasks Closed by Month

