Home > TaskRay | An Overview

TaskRay | An Overview [1]

February 28, 2017 by Kate O'Connell [2]

SET is all about leveraging eComm tools to streamline workflow and keep communications organized. For this reason, we use **TaskRay**, a Salesforce app, as the primary channel of coordination between you and <u>your eComm Specialist</u> [3]. Each and every eComm communication or event is assigned it's own task within TaskRay. Handy information, including the communication deadline, links to your audience report, and file attachments are all housed within the task.

Your eComm Specialist will create the task in TaskRay during the discovery meeting or phone call; after the task has been created, you be able to use it for documentation and questions. The interactive graphics below give you an overview of a TaskRay task. If you have questions about TaskRay, submit a help ticket here [4].

- HOME VIEW
- TASK DETAILS
- CHATTER
- CHECKLIST

TaskRay | Home View [5]

TaskRay | Task Details [6]

TaskRay | Chatter

TaskRay | Checklist [8]

Licensed eComm Users [9], Salesforce [10], TaskRay [11] Display Title: TaskRay | An Overview Send email when Published: Yes

Source URL: https://www.cu.edu/blog/set/taskray-overview

Links [1] https://www.cu.edu/blog/set/taskray-overview

[2] https://www.cu.edu/blog/set/author/292 [3] https://www.cu.edu/ecomm/set

[4] https://www.cu.edu/ecomm/help [5] https://www.cu.edu/h5p/taskray-home-view

[6] https://www.cu.edu/h5p/taskray-task-details [7] https://www.cu.edu/h5p/taskray-chatter

[8] https://www.cu.edu/h5p/taskray-checklist [9] https://www.cu.edu/blog/set/tag/licensed-ecomm-users

[10] https://www.cu.edu/blog/set/tag/salesforce [11] https://www.cu.edu/blog/set/tag/taskray