



Sending by message type

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Fictional document

Fictional document — demonstration example

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Fictional document, produced for demonstration. **The scope is set per message type, not globally.**

Message type	Commits what?	Direct send openable?
Acknowledgement (CRM-ENV-001)	Nothing	Yes
Appointment confirmation (CRM-ENV-002)	An already agreed slot	Yes
Sending an already approved document (CRM-ENV-003)	Nothing new	Yes
Follow-up nudge ("where are you up to?") (CRM-ENV-004)	Nothing	Yes
Message carrying a price	A commercial commitment	No — prepared for review

Message type	Commits what?	Direct send openable?
Message carrying a lead time	Production	No — prepared for review
Message carrying a position	The company	No — prepared for review

What the follow-up nudge unblocks

Finding	Value
Records whose next action is over six months old	340
What most of them are waiting for	A "where are you up to?"
What that message commits	Nothing

What comes with a message prepared for review

Element supplied	Role
The last exchange	Picking up in the right place
The current amount	Not contradicting yourself
The announced close date	Knowing whether it still holds

The check that is not configurable

Before every send, direct or not: **the recipient has not objected to being contacted.**
Article 21 of the GDPR makes that right absolute — **no setting works around it.**

For the company to settle

Families open to direct send, among the four listed above: _____

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.