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?	Under a written sending mandate?
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?	Under a written sending mandate?
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

What the written sending mandate sets

Item	What is written
Scope	The families opened, among the four listed above
Ceiling	A number of sends and a maximum number of nudges per person
Duration	An end date

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Item	What is written
Withdrawal	**By a single word; the agent goes straight back to drafts**
Log	**Every send under the mandate, as it went out**

What no mandate opens

Setting a price, granting a discount, signing. The record is authoritative: the price and the signature belong to the salesperson. **Chasing an unpaid invoice**: there is no collection mandate; the amicable reminder is prepared by the collection agent and approved by an authorised person before it goes out.

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: _____

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> https://bluelemonagent.ai/en/entreprises/cas-usage/agent-ia-commercial-crm

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