

<u>Knowledgebase</u> > <u>SalesPad</u> > <u>Video</u> > <u>CRM Scheduled Tasks</u> | <u>SalesPad Desktop</u>

CRM Scheduled Tasks | SalesPad Desktop

Megan De Freitas - 2025-06-05 - <u>Video</u>

Create CRM tasks on the customer card from a sales document, based on document or item characteristics.