

To learn more about TaskRay, the top-rated 100% Salesforce native project management app, schedule a demo by emailing us at sales@bracketlabs.com.

	SALESFORCE EDITIONS			
	G	P	E	U
VIEWS				
Kanban Manage projects and tasks like sticky notes on a whiteboard.	✓	✓	✓	✓
Row Visualize to-dos for any given search by grouping tasks by selected attributes.	✓	✓	✓	✓
Plan Drag and drop Gantt-style chart: shift schedules, create dependencies and reassign team members.	✓	✓	✓	✓
Calendar Schedule tasks on a monthly calendar layout to show due dates, milestones, and potential conflicts.	✓	✓	✓	✓
PROJECTS				
Templates Save time by copying saved project templates, including tasks, checklists, and attached files.	✓	✓	✓	✓
Filters & Views View projects in standard views or create custom filters.	✓	✓	✓	✓
Archive Hide completed projects from boards. Archived projects are still available in reports.	✓	✓	✓	✓
Schedule Projects Build projects on timelines for improved visual scheduling.	✓	✓	✓	✓



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<p>Favorites Star favorite projects for quick access from the sidebar.</p>	✓	✓	✓	✓
<p>Multi-Project Boards Drill in or select multiple projects at once.</p>	✓	✓	✓	✓
<p>Colors Easily change project color identifiers.</p>	✓	✓	✓	✓
<p>Privacy Settings Control level of visibility and sharing access by project.</p>			✓	✓
TASKS				
<p>Task Cards Work quickly with at-a-glance info and one-click actions.</p>	✓	✓	✓	✓
<p>Quick & Bulk Actions One click to update status, project, reassign, and more. Select one task at a time or perform bulk actions.</p>	✓	✓	✓	✓
<p>Checklists Use multiple checklists to stay organized within a task.</p>	✓	✓	✓	✓
<p>Multiple "Owners" Using checklist assignments, divide and conquer any task.</p>	✓	✓	✓	✓
<p>Repeating Tasks Easily create repeating tasks for predictable to-dos.</p>	✓	✓	✓	✓
<p>Dependencies Set-up projects with tasks that are dependent on each other and watch timelines auto update.</p>	✓	✓	✓	✓



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<p>Daily Planner Set up daily email reminders for current to-do list and summary of recent activity.</p>	✓	✓	✓	✓
<p>Email to Task Forward emails to a unique TaskRay address to create new tasks.</p>	✓	✓	✓	✓
<p>Task Assignments Automatic email notifications upon task assignment.</p>	✓	✓	✓	✓
<p>Labels & Topics Quickly identify task cards with topics or custom fields as labels.</p>	✓	✓	✓	✓
<p>Quick Add Quickly add tasks from any view.</p>	✓	✓	✓	✓
<p>Group Tasks with Bulk Update Group tasks with customized grouping options to bulk view and update sets of tasks.</p>	✓	✓	✓	✓
<p>Milestones Add milestones to your projects to set dates for important deliverables.</p>	✓	✓	✓	✓
<p>Blocked Tasks Mark tasks as blocked to visually highlight them across all views.</p>	✓	✓	✓	✓
<p>Time Tracking Quick add time from a task card, checklists, or task detail. View timesheet for aggregate view.</p>	✓	✓	✓	✓
COLLABORATION				
<p>Chatter Conversation Enable project collaboration. Quickly identify new conversations with task card notifications.</p>	✓	✓	✓	✓



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<p>Feed Tracking Track and follow field changes in the Chatter feed for real-time updates.</p>	✓	✓	✓	✓
<p>Recent Activity View project and task feed in one aggregated sidebar.</p>	✓	✓	✓	✓
<p>Auto-Follow Auto-follow projects to get updates on all tasks.</p>	✓	✓	✓	✓
<p>Share Files Attach files and links directly to projects and tasks.</p>	✓	✓	✓	✓
<p>Recent Files Easily search and view all project files in one place.</p>	✓	✓	✓	✓
USERS				
<p>Queues Add tasks to a queue and assign team members later.</p>	✓	✓	✓	✓
<p>Teams Add users, queues, and groups to project teams.</p>	✓	✓	✓	✓
<p>Bulk Manage Bulk add and remove team members to easily manage team changes.</p>	✓	✓	✓	✓
<p>Assignments Drag and drop a team member from the sidebar to reassign tasks.</p>	✓	✓	✓	✓

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CUSTOMIZATIONS				
Project & Task Details Easily customize fields, groupings, labels, & more with standard Salesforce platform administration.	✓	✓	✓	✓
Custom Statuses Organize tasks into customized columns to fit unique business process.	✓	✓	✓	✓
Multiple Kanban Boards Customize columns specific to a department, team, or project & task record type.			✓	✓
Lightning Components Easily drop pre-built components into any Salesforce object with Lightning App Builder.	✓	✓	✓	✓
Workflow and Approval Automation Automate custom notification emails and approval processes.			✓	✓
Processes Create new projects automatically from templates using built-in Process Builder options.	✓	✓	✓	✓
MORE				
100% Salesforce Native Manage projects without leaving Salesforce. Seamlessly move between Lightning & Classic Editions.	✓	✓	✓	✓
TaskRay Mobile Available for tablets and phones with Salesforce1.	✓	✓	✓	✓
International & Multilingual Support Supported through Salesforce in Translation Workbench. Also allows different date formats.	✓	✓	✓	✓

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<p>Reports</p> <p>Use default reports or generate custom reports using commonly requested metrics.</p>	✓	✓	✓	✓
<p>Dashboards</p> <p>Sample project and time tracking dashboards providing jumpstart to management summaries.</p>		✓	✓	✓
<p>Printing</p> <p>Several print options for generating and sharing Gantt-style, Calendar, and Agenda reports.</p>	✓	✓	✓	✓
<p>Unlimited FREE Support</p> <p>Our Customer Support team puts the "service" in software as a service.</p>	✓	✓	✓	✓
<p>Extensions</p> <p>TaskRay works with apps like Cirrus, Box, Conga, Gridbuddy, Workato and more.</p>	*	*	✓	✓
<p>Salesforce Communities</p> <p>Invite your customers, partners, vendors to interact with TaskRay.</p>			\$	\$

★ Some Salesforce limitations apply, please contact us for more details.

\$ TaskRay works with Salesforce Communities, but an extra Salesforce charge applies, Please contact us for more details.

SALESFORCE EDITIONS	
G	Group Edition
P	Lightning Professional
E	Lightning Enterprise
U	Lightning Unlimited