

Communication

Ical option

From this release (02/21) on it is possible to include an invitation when sending an email. The recipient can automatically add this to his / her calendar. You can add this option by going to Administration-Communication templates. Here you can select a template and add the option via the dropdown menu.

The screenshot shows the PlanManager interface. On the left, an email template editor with a text area containing placeholders like [Make], [Model], [Licenseplate], [VIN], [FirstRegistration], [Insurer], [Expert], [Client], [ClientAddress], [ClientZipcode], [ClientTown], [ClientPhone], [ClientMobile], [ClientMail], and [User]. To the right of the editor is a sidebar with a table of fields (Model, Mileage, Vin, Tasks, Parts, Order, Key Tag Number, Job) and a dropdown menu for 'Email' with options: 'Send to', 'Other', 'CC', 'select a printable document', 'Select an ical event type' (highlighted), 'Book in date', 'Est Appointment', 'Est Comp Date', and 'Book out date'. On the far right, a table lists various email templates with a checkbox and a wrench icon for each.

Model	Mileage
Vin	Tasks
Parts	Order
Key Tag Number	Job

Estimate by email	Estimate by email	Estimate by email
<input checked="" type="checkbox"/> Invitation initial damage assessment (te	Invitation initial damage assessment (te	Invitation initial d
<input checked="" type="checkbox"/> Invoice email	Invoice email	Invoice email
<input checked="" type="checkbox"/> Order	Order	Order
<input checked="" type="checkbox"/> Payment car repair	Payment car repair	Payment car repa
<input checked="" type="checkbox"/> Reminder 1	Reminder 1	Reminder 1
<input checked="" type="checkbox"/> Reminder 2	Reminder 2	Reminder 2
<input checked="" type="checkbox"/> Reminder 3	Reminder 3	Reminder 3
<input checked="" type="checkbox"/> Rental agreement	Rental agreement	Ersatzfahrzeug Ve
<input checked="" type="checkbox"/> Repair agreement	Repair agreement	Vereinbarung die
<input checked="" type="checkbox"/> Repair Agreement2	Repair Agreement2	Repair Agreement
<input checked="" type="checkbox"/> Satisfaction survey request	Satisfaction survey request	Zufriedenheitsum
<input checked="" type="checkbox"/> Selfserviceportal	Selfserviceportal	Selfserviceportal

You can send an Ical invitation for the appointment date, quote appointment, expected end date, planned delivery date. You should definitely enter this date in the job so that it can be sent via the Ical invitation. ! Important: this option is only usable if emails are sent directly from PlanManager. This will not work if the config MAIL_TROUGH_OUTLOOK is enabled. Furthermore, these Ical attachments were automatically added to the template appointment specifications and repair appointments that are used by users of the Self Service Portal. No manual adjustment has to be made for the automatic mails from the Self Service Portal.

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