

# Communication

## Email communication when status changes

It is now possible to have an automatic mail sent when changing the status of the job. To set this you can go to System - Lists - Status.

The screenshot shows the PlanManager web application interface. On the left is a dark sidebar with a vertical menu containing icons and labels for COMMUNICATION, HELP, WORKSHOP, JOB, PLANNING, REPORT, MAINTENANCE, and SYSTEM. The main content area has a top navigation bar with 'Back', 'General settings', 'Customized settings', 'Lists', and 'Usergroups'. The 'Lists' tab is active, displaying a table of configuration items. A dropdown menu is open on the right side of the table, showing options: 'ATR Stop reason', 'Status' (highlighted with a blue underline), 'Rental type', 'Document Category', 'Repair type', and 'Damage cause' (with a factory icon). The table contains 14 rows, each with a wrench icon and a text label.

	Name
	BASFKPI_COMPANY_IDENT
	BASFKPI_PASS
	BASFKPI_SAPCODE
	BASFKPI_USER
	INSPECTOR_APP_MAINTENAN
	FILE_SAVE_ODBC_FILE
	INVOICE_ODBC_FILE
	ORDER_PURCHASE_AMOUNT_ODBC_FILE
	FORCE_LOGIN_AFTER_MOBILE_UPDATE
	ADDRESS_MULTI_FIELDS
	ADVANCED_FILE_STATUS_NOTIFICATIONS
	AGENT_TABLE_COLUMNS

You can select a template that will be sent automatically when changing the status. The template will always be sent by email, to the party indicated in the

# Communication

Automatic communication on status change

<input type="checkbox"/> Estimate by email	<div>^</div> <div></div> <div>v</div>
<input type="checkbox"/> Invitation initial damage assessm't web	
<input type="checkbox"/> Invitation initial damage assessment (te	
<input type="checkbox"/> Invitation repair appointment (web)	
<input type="checkbox"/> Invoice email	
<input type="checkbox"/> Offer Confirmation	
<input type="checkbox"/> Offer Request	
<input type="checkbox"/> Order	
<input type="checkbox"/> Payment car repair	
<input type="checkbox"/> Reminder 1	
<div>— — — — —</div>	

It is also possible to have an SMS sent when changing a status. This is only possible via templates created with the type "SMS".

communication template.

# Communication

Naam

SMS vertraging herstelling

Onderwerp

Herstelling - vertraging

B

I

U

≡

≡

≡

≡

≡

≡

Font Size...

Font Family

Font Forma

≡

≡

≡

→

↺

↻

🗑️

🔍

X<sub>2</sub>

X<sup>2</sup>

↔

🔧

🔗

📎

Beste klant, uw wagen [Make] [Model] - [Licenseplate] zal later klaar zijn dan voorzien. De nieuwe voorzine datum is [PredictedEnd] om [PredictedEndTime]. Dank u voor het begrip, [Location].

Nummerplaat	Merk
Model	Kilometerstand
Chassisnummer	Taken
Onderdelen	Bestel
Bloknummer	Dossier

Sms

Verstuur naar

Bestuurder

☐ CC

Selecteer een afdrukbaar bestand

Verwijderen

Bewaren

Important! You can only send an automatic email to customers who have checked the checkbox 'email' at Maintenance – Third Parties - Customers. This was added conforming the GDPR regulations. To send an SMS, the checkbox "SMS" must be checked.

# Communication

Owner Editor

Name

test

Lastname

219

Address

Address2

Postcode

Town

County/Province

Country

Belgium

Phone

Fax

Mobile

037271212

Blocked

Contact

Show identity card

Email

support@insypro.com

External Ref

Caps Code

Eligiblenumber

VAT Number

VAT Percentage

0 %

Customer Type

select a client type

Legal Personality

juridical

Title

Iban

Bic

Language

Nederlands (BE)

Repairer

select a repairer

Rebate scheme

select a rebate scheme

Pricing

select a pricing

Invoice Term

Internal Ledger

- Select One -

Display Comment

Comment

Save

Delete

Link To Albatros

Privacy

Communication

Receive

☐ SMS

☐ Mailings

☒ Email

☐ Survey

☐ Papermail

Unique solution ID: #4053  
Author: Sophia Bouhajra  
Last update: 2022-02-10 10:41