

Kommunikation

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 is open, displaying a text area with placeholders like [Make], [Model], [Licenseplate], [VIN], [FirstRegistration], [Insurer], [Expert], [Client], [ClientAddress], [ClientZipcode], [ClientTown], [ClientPhone], [ClientMobile], [ClientMail], and [User]. To the right of the text area is a sidebar with a table of fields and a dropdown menu. The table has columns for 'Model', 'Mileage', 'Vin', 'Tasks', 'Parts', 'Order', 'Key Tag Number', and 'Job'. The dropdown menu is open, showing options: 'Email', 'Send to', 'Other', 'CC', 'select a printable document', 'Select an ical event type', and 'Select an ical event type' (highlighted). Below this, there are four sub-options: 'Book in date', 'Est Appointment', 'Est Comp Date', and 'Book out date'. On the right side of the screenshot, a table lists various email templates with their names and corresponding icons.

Icon	Estimate by email	Estimate by email	Estimate by email
🔗	Invitation initial damage assessment (te	Invitation initial damage assessment (te	Invitation initial d
🔗	Invoice email	Invoice email	Invoice email
🔗	Order	Order	Order
🔗	Payment car repair	Payment car repair	Payment car repa
🔗	Reminder 1	Reminder 1	Reminder 1
🔗	Reminder 2	Reminder 2	Reminder 2
🔗	Reminder 3	Reminder 3	Reminder 3
🔗	Rental agreement	Rental agreement	Ersatzfahrzeug Ve
🔗	Repair agreement	Repair agreement	Vereinbarung die
🔗	Repair Agreement2	Repair Agreement2	Repair Agreement
🔗	Satisfaction survey request	Satisfaction survey request	Zufriedenheitsum
🔗	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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