

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 email template editor. On the left, there is a text editor with a sample email body. In the center, there is a table with vehicle information and a dropdown menu for selecting an Ical event type. On the right, there is a list of email templates.

Sample Email Body:

Hello,

because of an accident is vehicle [Make] [Model] with license plate [Licenseplate] and VIN [VINnr], first registration [FirstRegistration]

stated as "total loss". This is the problem [Insurer], and this is the expert [Expert].

The vehicle belongs to customer :

[Client]

[ClientAddress]

[ClientZipcode] [ClientTown]

N° Tél : [ClientPhone]

N° GSM : [ClientMobile]

E-mail : [ClientMail]

Regards,

[User]

Vehicle Information Table:

Model	Mileage
Vin	Taxi
Parts	Order
Key Tag Number	Job

Ical Event Type Dropdown:

- Email
- Send to
- Other
- CC
- Select a printable document
- Select an ical event type
- Book in date
- Est Appointment
- Est Comp Date
- Book out date

Email Templates Table:

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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