

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 navigation items: COMMUNICATION, HELP, WORKSHOP, JOB, PLANNING, REPORT, MAINTENANCE, and SYSTEM (highlighted in blue). The main content area has a top bar with a 'Back' button and tabs for '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).

	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>▼</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	

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

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

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