

Communication

How can I use variable fields in my communication templates?

Introduction

In PlanManager, you can create communication templates yourself via 'Maintenance' - 'Comm templates'.

This can be useful for quickly sending a standard text to customers.

You can also use variable fields in those communication templates.

That way you can personalize a standard text for a particular customer.

For Example:

Dear [Title] [Client],
Your vehicle [Make] [Model] [Licenseplate] is repaired.
Best regards,
[User]
[Location]

Becomes

Dear mr. Janssens,

Communication

Your vehicle BMW 320 1AES624 is repaired.

Best regares,
Matthias Van Woensel
Insypro - Planmanager

Own fields

If you want to use your own fields in your communication template, you can do this by adding the value CF.

For example: suppose you have added your own 'External Refnr' field. Then you can use this by using the [CFExtern refnr] tag.

If your own field is not on the file screen but on the owner's popup, use the prefix CO (O of Owner) Example: [COExtern refnr]. If your own field is not on the file screen but on the insurer's popup, use the prefix CI (I of Insurer). Example: [CIExtern refnr]

List

A full list of all possible variable fields can be found below.

Globaal

Tagname	Description
[Company]	Name Company
[CompanyAddress]	Adress Company
[CompanyBank1Bic]	BIC/Swift code v. bank (1)
[CompanyBank2Bic]	BIC/Swift code v. bank (2)
[CompanyBank1Iban]	IBAN accountnr. Company (1)
[CompanyBank2Iban]	IBAN accountnr. Company (2)
[CompanyFax]	Fax Company
[CompanyMail]	Email Company
[CompanyNr]	VAT-number Company (Ondernemingsnr)
[CompanyPhone]	Phonenumber Bedrijf

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[CompanyRPR]	Registrationoffice Company
[CompanyShort]	Shortened Companyname
[CompanyTown]	Town Company
[CompanyType]	Type Company (BVBA/NV)
[CompanyWebsite]	Website Company
[CompanyZipcode]	Zipcode Company
[Now]	Date of print
[NowBin]	Date of print in BIN format
[NowTime]	Time of print
[Signature]	Digitale signature
[User]	Current User
[UserPhone]	Phone User
[UserMail]	Email adress User
[Year]	Year of print

File

Tagname	Description
[AlbatrosRef]	Albatrosreference
[Alignment]	Alignment (Yes/No)
[Blocknr]	Blocknumber
[CourtesyCar]	Courtesycar (Yes/No)
[Damage]	Damage description
[DamageSL]	Damage description single line (limit 92 characters)
[DamageWW]	Damage desription with wordwrap
[DirectPayment]	Direct payment (Yes/No)
[Estimation]	Active Estimation (Visible on screen)
[File]	File number
[Informexnr]	Informexnumber
[Informexinfo]	Info from Informex
[Ordernr]	File number (Alias)
[RepairDesc]	Repair description
[RepairDescWW]	Repair description with wordwrap
[Status]	Status description
[TaskComments]	All notes of tasks merged
[Ubenchnr]	Ubenchreference
[VatBookNr]	Number from VAT-book

File (Date & Time)

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Tagname	Description
[AppointmentDate]	Appointment Date
[AppointmentTime]	Appointment Time
[AppointmentQuoteDate]	Date for quote appointment
[AppointmentQuoteTime]	Time for quote appointment
[CreationDate]	Creation Date file
[DamageDate]	Damage Date
[Date]	Damage Date (Alias)
[Finished]	Date Repair Finish
[FinishedTime]	Time Repair Finish
[PickupDate]	Date pickup/deliverd
[PickupTime]	Time pickup/deliverd
[PredictedEnd]	Predicted end
[PredictedEndTime]	Tijd van voorziene einddatum
[Ready]	Datum klaar
[ReadyTime]	Tijd van datum klaar
[SignoffDate]	Afmeldingsdatum
[Started]	Date Started
[StartedTime]	Time Started
[VehicleIn]	Date Vehicle in
[VehicleInTime]	Time Vehicle in
[WorkTime]	Sum duration of tasks
[RepairPlannedStart]	Planned start based on the planning
[RepairPlannedEnd]	Planned end based on the planning

File (Financial)

Tagname	Description
[ProductTotal]	Total cost parts (active estimation)
[ProductTotalInvoice]	Total cost parts (invoice estimation)
[RentalCost]	Total cost first courtesyCar
[ServiceTotal]	Total cost tasks (active estimation)
[ServiceTotalInvoice]	Total cost tasks (invoice estimation)
[TotalEx]	Total Exclusive (estimation)
[TotalIn]	Total Inclusive (estimation)
[TotalVat]	Total VAT (estimation)
[VatPercent]	VAT percentage

Tasks (In block -> [:Services] ... [/:Services])

Tagname	Description
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[Category]	task type
[Comment]	Comment
[Cost]	Total cost (from estimation)
[HourlyRate]	Rate per hour (from estimation)
[Time]	Time in minutes
[TimeAE]	Time in labourhours
[Type]	Tasktype (description)

Parts (In blok -> [:Products] ... [/:Products])

Tagname	Description
[Category]	Category partstype
[Comment]	Comment
[Name]	Name (description)
[Number]	Number
[Quantity]	Quantity
[Price]	Unitprice (from estimation)
[Replace]	Replacing (Yes/No)
[Total]	Total price (from estimation)
[Type]	Partstype (description)

Activities (In block -> [:Activities] ... [/:Activities])

Tagname	Description
[Breaktime]	Breaktime in seconds
[Day]	Day of performance
[Duration]	Duration in seconds
[Employee]	Name executive employee
[End]	Date + hour finishing
[EndTime]	End Time
[Rate]	Salary Rate executive employee
[Start]	Date + hour start
[StartTime]	hour start
[Tasktype]	Tasktype (description)

Vehicle

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Tagname	Description
[Alarm]	Alarm (Yes/No)
[AlarmCode]	Alarmcode
[Body]	Vehicletype (selectionfield popup details vehicle)
[CC]	CC
[Colour]	Colour
[ColourCode]	Colourcode
[Doors]	Number of doors
[FirstRegistration]	Date first registration
[Fuel]	Fuel
[KW]	KiloWatt
[Licenseplate]	Licenseplate
[Make]	Make
[Mileage]	Mileage damage
[Mileage2]	Mileage repair
[Model]	Model
[ModelYear]	Year of construction
[PaintType]	Painttype
[RadioCode]	Radiocode
[Remarks]	Remarks
[SecondRegistration]	Date second registration
[Trim]	Trim (colour interior)
[Type]	Vehicletype (free field left column filescreen)
[Vin]	Vin
[Vinnr]	Vin (alias)
[Vatdeductability]	VAT deductability

Third Parties

Tagname	Description
[Agent]	Name agent
[AgentFile]	Filenumber agent
[Confirmator]	Name user who set repairorder
[Creator]	Name user who created the file
[DamageClaim]	Filenumber damageclaim
[Excess]	Excess
[Expert]	Name expert 1
[ExpertFile]	Filenumber expert
[ExpertInformexNr]	Informexnumber expert
[Expert2]	Name expert 2
[Expert2File]	Filenumber expert 2
[Expert3]	Name expert 3
[Expert3File]	Filenumber expert 3

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[InsuranceNr]	Insurancenummer
[Insurer]	Name Insurer
[Repairer]	Name Repairer
[Towage]	Towage (Yes/No)

CourtesyCar

Tagname	Description
[Class]	Vehicle class
[Days]	Number of days
[Damage_Start]	Damage courtesyCar at start
[Damage_End]	Damage courtesyCar at arrival
[End_Date]	End date rental
[End_Hour]	End hour rental
[Excess]	Excess insurance
[FreeKM]	Mileage without extra costs
[Mileage_Start]	Mileage at start
[Mileage_End]	Mileage at arrival
[Planned_Start]	Planned startdate rental (date and hour)
[Planned_Start_Date]	Planned startdate rental (date)
[Planned_Start_Hour]	Planned startdate rental (hour)
[Planned_End]	Planned enddate rental (date and hour)
[Planned_End_Date]	Planned enddate rental (date)
[Planned_End_Hour]	Planned enddate rental (hour)
[Rent]	Rental price per day
[Rental]	Internal id (not suitable for publication)
[R_Automatic]	Automatic (Yes/No)
[R_CarCost]	Rentalcost vehicletype
[R_Colour]	Color CourtesyCar
[R_Damage]	Damage CourtesyCar
[R_DriveFrom]	Date in use CourtesyCar
[R_Emission]	Emission CourtesyCar
[R_Free]	Free (Yes/No)
[R_Fuel]	Fuel CourtesyCar
[R_FuelCapacity]	Fuelcapacity CourtesyCar
[R_Insurance]	Insurance CourtesyCar (ba/omnium)
[R_Licenseplate]	Licenseplate CourtesyCar
[R_Location]	Location rental
[R_Emission]	CO2 emission
[R_Make]	Make CourtesyCar
[R_Model]	Model CourtesyCar
[R_Number]	Number CourtesyCar
[R_Reason]	Reason rental
[R_Reference]	Reference rental
[R_Ref_Licenseplate]	Licenseplate of the replacement car

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[R_Remarks]	Remarks entered per rental!=damage
[R_Service]	Service rental
[R_Total]	Total rental cost
[R_Type]	Type CourtesyCar
[R_Vinnr]	Vinnumber CourtesyCar
[Signature_Start]	Signature start reparation
[Signatute_End]	Signature end reparation
[Start_Date]	Startdate rental
[Start_Hour]	Hour start rental
[Fuel_Level_Start]	Fuel level at start
[Fuel_Level_End]	Fuel level at end
[Fuel_Difference]	Fuel Difference (could be negative)
[Fuel_Usage]	Fuel Usage difference (only positive)

Subcontracting job

Tagname	Description
[ThirdPartyDelivery]	Expected delevery
[ThirdPartyDescr]	Third party description
[ThirdPartyEnd]	End date
[ThirdPartyEstCost]	Estimated cost
[ThirdPartyInvCost]	Invoiced cost
[ThirdPartyReinvAmt]	Re-invoice amount
[ThirdPartyRemarks]	Remarks
[ThirdPartyStart]	Start date

Location

Tagname	Description
[Location]	Name location
[LocationAddress]	Adress
[LocationBankBic]	BIC/Swift code bank
[LocationBankIban]	Iban accountnr. from location
[LocationColor]	Colorcode (adjustable in maintenance)
[LocationContact]	Contactperson
[LocationCountry]	Country
[LocationFax]	Fax
[LocationNumber]	VAT-number
[LocationMail]	Email-adress

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[LocationPhone]	Phone
[LocationRepairer]	Name repairer
[LocationRPR]	RPR
[LocationTown]	Town
[LocationType]	Companytype
[LocationWebsite]	Website
[LocationZipcode]	Zipcode

Customer / Owner

Tagname	Description
[Client]	Name customer/owner
[ClientAddress]	Adress
[ClientAddress2]	Adress 2
[ClientCountry]	Country
[_ClientCountry]	Country in English
[ClientEligibleNr]	Eligible number
[ClientExists]	CSS-rule customer (normal/none)
[ClientFax]	Fax
[ClientMail]	Email-adress
[ClientMobile]	Mobile number
[ClientMobileOrPhone]	Mobile number when filled in, otherwise phonenr
[ClientNumber]	VAT-number
[ClientPhone]	Phone
[ClientRef]	Customer reference
[ClientTitle]	Title (= Type, conversion from config)
[ClientTown]	Town
[ClientType]	Type (Business, Sir...)
[ClientZipcode]	Zipcode
[ClientLicense]	Driverlicense
[ClientVat]	VAT percentage
[ClientBusinessType]	Business type
[ClientComment]	Comment field
[ClientBankIban]	Iban code
[ClientBankBic]	Bic code
[ClientExtRef]	Informex reference
[ClientContact]	Contact
[ClientInvoiceterm]	Payment Term
[ClientIdentitycardBirthday]	Birthdate IDcard
[ClientIdentitycardExpiry]	Expiredate IDcard
[ClientIdentitycardStart]	Date IDcard valid from
[ClientIdentitycardBirthPlace]	Birthplace IDcard
[ClientIdentitycardIssuance]	Place of issue
[ClientIdentitycardNumber]	IDcard number

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Driver

Tagname	Description
[Driver]	Name driver
[DriverAddress]	Adress
[DriverAddress2]	Adress 2
[DriverBankBic]	Bic code
[DriverBankIban]	Iban code
[DriverComment]	Comment field
[DriverCountry]	Country
[DriverExists]	CSS-rule driver (normal/none)
[DriverFax]	Fax
[DriverIdentitycardBirthday]	Birthdate on IDcard
[DriverIdentitycardExpiry]	Expiredate IDcard
[DriverIdentitycardStart]	IDcard valid from
[DriverIdentitycardBirthPlace]	Birthplace IDcard
[DriverIdentitycardIssuance]	Place of issue
[DriverIdentitycardNumber]	IDcard number
[DriverLicense]	Number driverlicense
[DriverMail]	Email-adress
[DriverMobile]	Mobile number
[DriverPhone]	Phone
[DriverMobileOrPhone]	Mobile number when filled in otherwise phonenumber
[DriverRef]	Driverreference
[DriverTown]	Town
[DriverType]	Type (Business, Sir, ...)
[DriverVat]	VAT percentage
[DriverZipcode]	Zipcode

Insured party

Tagname	Description
[InsuredParty]	Name insured party
[InsuredPartyAddress]	Adress
[InsuredPartyAddress2]	Adress 2
[InsuredPartyBankBic]	Bic code
[InsuredPartyBankIban]	Iban code
[InsuredPartyComment]	Comment field
[InsuredPartyCountry]	Country
[InsuredPartyExists]	CSS- rule Insured party (normal/none)

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[InsuredPartyFax]	Fax
[InsuredPartyLicense]	Number driverlicense
[InsuredPartyMail]	Email-adress
[InsuredPartyMobile]	Mobile number
[InsuredPartyMobileOrPhone]	Mobilenr when filled in otherwise phonenumber
[InsuredPartyNumber]	VAT-number
[InsuredPartyPhone]	Phone
[InsuredPartyRef]	Insured party reference
[InsuredPartyTown]	Town
[InsuredPartyType]	Type (business, sir, ...)
[InsuredPartyVat]	VAT percentage
[InsuredPartyZipcode]	Zipcode

Sent by

Tagname	Description
[SentBy]	Name party send by
[SentByAddress]	Adress
[SentByAddress2]	Adress 2
[SentByBankBic]	Bic code
[SentByBankIban]	Iban code
[SentByComment]	Comment field
[SentByCountry]	Country
[SentByExists]	CSS- rule Insured party(normal/none)
[SentByFax]	Fax
[SentByLicense]	Number driverlicense
[SentByMail]	Email-adress
[SentByMobile]	Mobilenummer
[SentByNumber]	VAT-number
[SentByPhone]	Phone
[SentByRef]	Sent by reference
[SentByTown]	Town
[SentByType]	Type (Business, sir, ...)
[SentByVat]	VAT percentage
[SentByZipcode]	Zipcode

Expert (1)

Tagname	Description
[Expert]	Name expert 1
[ExpertAddress]	Adress

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[ExpertCountry]	Country
[ExpertExists]	CSS-rule Expert (normal/none)
[ExpertFax]	Fax
[ExpertMail]	Email-adress
[ExpertMobile]	Mobilenummer
[ExpertPhone]	Phone
[ExpertRef]	Reference
[ExpertTown]	Town
[ExpertZipcode]	Zipcode

Expert (2)

Tagname	Description
[Expert2]	Name expert 2
[Expert2Address]	Adress
[Expert2Country]	Country
[Expert2Exists]	CSS-rule Expert (normal/none)
[Expert2Fax]	Fax
[Expert2Mail]	Email-adress
[Expert2Mobile]	Mobilenummer
[Expert2Phone]	Phone
[Expert2Ref]	Reference
[Expert2Town]	Town
[Expert2Zipcode]	Zipcode

Insurer

Tagname	Description
[Insurer]	Name insurer
[InsurerAddress]	Adress
[InsurerAddress2]	Adress 2
[InsurerBankBic]	Bic code
[InsuredBankIban]	Iban code
[InsurerCountry]	Country
[InsurerExists]	CSS-rule insurer (normal/none)
[InsurerFax]	Fax
[InsurerInformex]	Informexnumber
[InsurerMail]	Email-adress
[InsurerMobile]	Mobilenummer
[InsurerPhone]	Phone
[InsurerRef]	Reference
[InsurerTown]	Town
[InsurerUbenchRef]	Ubench reference
[InsurerZipcode]	Zipcode

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Repairer

Tagname	Description
[Repairer]	Naam repairer
[RepairerAddress]	Adress
[RepairerCountry]	Country
[RepairerExists]	CSS-rule repairer (normal/none)
[RepairerFax]	Fax
[RepairerMail]	Email-adress
[RepairerMobile]	Mobilenummer
[RepairerPhone]	Phone
[RepairerRef]	Reference
[RepairerTown]	Town
[RepairerZipcode]	Zipcode

Supplier

Tagname	Description
[Supplier]	Name supplier
[SupplierAddress]	Adress
[SupplierCountry]	Country
[SupplierExists]	CSS-rule supplier (normal/none)
[SupplierFax]	Fax
[SupplierMail]	Email-adress
[SupplierMobile]	Mobilenummer
[SupplierPhone]	Phone
[SupplierRef]	Reference
[SupplierTown]	Town
[SupplierZipcode]	Zipcode
[SupplierContact]	Contactfield supplier

Agent

Tagname	Description
[Agent]	Name Agent

Communication

[AgentAddress]	Adress
[AgentCountry]	Country
[AgentExists]	CSS-rule Agent (normal/none)
[AgentFax]	Fax
[AgentMail]	Email-adress
[AgentMobile]	Mobilenummer
[AgentPhone]	Phone
[AgentRef]	Reference
[AgentTown]	Town
[AgentZipcode]	Zipcode

Damage

Tagname	Description
[DamageList]	Positional list (argument for img-script)

Damages (In blok -> [:Damages] ... [/:Damages])

Tagname	Description
[Number]	Number (reference on damagemap)
[Comment]	Comment
[Instruction]	Instruction
[Type]	Type
[Zone]	Zone (description part & position)

Damages (2) (In blok -> [:Damagelines] ... [/:Damagelines])

Tagname	Description
[Name]	Description (part: description with number)
[Nr]	Number (reference on damagemap, repeating)
[Quantity]	Quantity (task: by hours, parts: in number)
[Price]	Unitprice
[SType]	Type (Task/Part)
[Total]	Total cost

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Order

Tagname	Description
[Order]	Number
[OrderDate]	Date
[OrderRemark]	Remark
[PreferredSupplyDate]	Supply Date

Orderlines(In blok -> [:Orderlines] ... [/:Orderlines])

Tagname	Description
[Backorder]	Quantity in backorder
[CheckRec]	CSS-tag Received ('checked=checked/')
[Descr]	Description
[Number]	Productnumber
[Order]	Order reference (repeating)
[Quantity]	Quantity
[Received]	Quantity received
[Returned]	Quantity returned
[Position]	A sequential numbering on line level. Easy way to communicate with your supplier.
[Status]	Status of the line
[Comment]	Comment of the line

Orderlines 2 (In blok -> [:GroupedOrderLines])

Tagname	Description
[Backorder]	Quantity in backorder
[CheckRec]	CSS-tag Received ('checked=checked/')
[Descr]	Description group
[Order]	Ordernumber (repeating)
[Quantity]	Quantity
[Received]	Quantity received
[Returned]	Quantity returned

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Invoicing

Tagname	Description
[Comment]	Comment
[InvoiceType]	Invoicetype
[InvoiceNr]	Invoicenummer
[InvoiceDate]	Invoicedate
[InvoiceCreator]	User who create the invoice
[InvoiceEnddate]	Vervaldatum factuur
[InvoicePaydate]	Date invoice payable
[JournalCode]	Journalcode
[JournalCreator]	User who saved the invoice in the journal
[JournalName]	Journal name
[Reference]	Long reference (from config tabel)
[ShortReference]	Short reference (from config tabel)
[TotalEx]	Total exclusive
[TotalIn]	Total inclusive
[TotalPayable]	Variable with the value of the outstanding amount of the invoice
[TotalVat]	Total VAT
[VatDeduct]	VAT after deduction excess
[VatPercent]	Percentage VAT

Invoicelines (In blok -> [:Invoicelines] ... [:Invoicelines])

Tagname	Description
[Description]	Description
[Discount]	Discountpercentage
[Quantity]	Quantity
[Total]	Total exclusive
[TotNoDisc]	Total exclusive without discount
[UnitPrice]	Unitprice
[Vat]	VAT- percentage

Invoicelines 2 (In blok -> [:GroupedInvoiceLines])

Tagname	Description
[Description]	Description group
[Discount]	Discountpercentage
[Quantity]	Quantity

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[Total]	Total exclusive
[TotNoDisc]	Total exclusive without discount
[UnitPrice]	Unitprice
[Vat]	VAT-percentage

Driver

Tagname	Description
[Driver]	Name driver
[DriverAddress]	Adress
[DriverCountry]	Country
[DriverExists]	CSS-rule Driver (normal/none)
[DriverFax]	Fax
[DriverLicense]	Number driverlicense
[DriverMail]	Email-adress
[DriverMobile]	Mobilenumber
[DriverPhone]	Phone
[DriverRef]	Reference
[DriverTown]	Town
[DriverZipcode]	Zipcode

Billing party

Tagname	Description
[InvParty]	Name party
[InvPartyAddress]	Adress
[InvPartyAddress2]	Adress 2
[InvPartyZipcode]	Zipcode
[InvPartyTown]	Town
[InvPartyCountry]	Country
[InvPartyMobileOrPhone]	Mobilnr when filled in otherwise phone
[InvPartyPhone]	Phone
[InvPartyMobile]	Mobilenumber
[InvPartyFax]	Fax
[InvPartyMail]	Mail
[InvPartyVat]	VAT percentage
[InvPartyNumber]	VAT-number
[InvPartyBusinessType]	Type
[InvPartyRef]	Number
[InvPartyContact]	Contact
[InvPartyComment]	Comment field
[InvPartyBankIban]	Iban code

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[InvPartyBankBic]

Bic code

[InvPartyExtRef]

Informexnumber

[InvPartyExists]

CSS-rule party (normal/none)

[InvPartyInvoiceterm]

Term of payment

Unique solution ID: #1567

Author: Katrien Vanhaute

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