

# REPORTING

# **EMAIL DESIGNER**

The Email Designer tool gives users the ability to create email templates and provides a designer for customising existing emails within BPO2. Users also have the opportunity to test these email templates using BPO2's existing email service.

#### Work-flow Notification Emails

- Asset Conversion Required Notification that serialised stock item has been received, and must be converted from Stock to Asset in order to issue to a Part Request raised against the Asset Warehouse. This email will be sent to employee who requested the part – 'RequestedBy' on the Part Request.
- *Call Status Change* Notification that a call has just been created, or has changed status. This will be emailed to the customer primary contact.
  - *New Call Email* Notification that a new call has been created.
  - In Progress Call Email Notification that the call has been accepted and is in progress.
  - **On Hold Call Email** Notification that the call has been placed on Hold.
  - Suspended Call Email Notification that the call has been placed in Pending status.
  - Completed Call Email Notification that the call has been Completed.
  - Closed Call Email Notification that the call has been Closed.

- **Contract Approval Required** Notification that a contract has been released for approval. This email will be sent to all employees who have the security right to authorise a contract.
- *Contract Escalation Notification* Notification of changes to the contract escalation are emailed to the contract manager, with the same detail that is sent to the client via the Escalation Notification Service.
- *Contract Closure Approval* Notification of contract closure approval required sent to employees who have the security right to approve closure.
- **Contract Critical Changes** Notification of changes to the Contract Header, Items or Fees. This email will be sent to all employees who have the security right to authorise a contract.
- **Credit Note Approval Required** Notification that a Credit Note has been released for approval. Sales Credit Note : an email will be sent to all employees who have the security right to authorise a Sales Credit Note. Contract Credit Note : an email will be sent to all employees who have the security right to authorise a Contract Credit Note.
- **Part Request Approval Required** Notification that a Part Request has been raised and requires approval. Only applicable where the Company Configuration - Part Request Auto Approval is set to 'No'. This email will be sent to all employees who have the security right to authorise a Part Request.
- *Part Request Goods Available Required* Notification that stock has been received for an outstanding part request. This email will be sent to employee who requested the part – 'RequestedBy' on the Part Request.
- **Print Service Configurable Email Template** for Invoices and Credit Notes (both Sales and Contract)



- *Purchase Requisition Approval Required* (Notification that a Purchase Requisition has been released for approval. This email will be sent to all employees who have the security right to authorise a Purchase Requisition.)
- Stock Adjustment Authorisation Required Notification that a Stock Adjustment Request has been raised and requires Approval. This email will be sent to all employees who have the security right to authorise a Stock Adjustment.
- *Supplier Invoice Authorisation Required* Notification that a Supplier Invoice has been raised and requires Approval. This email will be sent to all employees who have the security right to authorise a supplier invoice.
- **Technician Assignment Email** Notification that a call or project has been assigned. This email will be sent to the Employee who was Assigned to the Call or Project.
- *Work Request Raised* Notification that a Work Request has been created. Will be emailed to the Work Request 'AssignedTo' person.

### User Requirements

- A basic working knowledge of word processing software e.g. Microsoft Word.
- An email address, used for sending out emails.
- An understanding of where the email flags occur in BPO.

### Version Compatibility

- BPO2 v2.4.0.1 or later.
- BPOConfigurator v2.2.0.0 or later.
- Ensure that users have run the latest upgrade script necessary, to use the new email designer module.

**Ribbon Access:** Configurator > Reporting > Email Designer





# **TEMPLATE LISTING SCREEN - INTERFACE**

- 1. The **Email Template Listing for Company:** [Company Name] screen will open.
- 2. The left side of this screen contains a data grid of all the email templates currently in use by the system.
- 3. The right hand side of this screen contains the **Previewer** which displays the layout of the template selected on the left. This layout <u>cannot</u> be edited from this screen.
- 4. The 3 Processing buttons in this screen are:
  - i. Add: Add Template(add cross reference) Click here to create a template for an existing company email flag.
  - ii. **Edit**: Edit Template (add cross reference) Click here to edit a selected default template.
  - iii. Test Email (add cross reference): Click here to send an email template to an email address for preliminary viewing once it is processed by the email service.



## Email Designer

• •	1-	Email Template Listing fo	or Company : Examp	ple Company - BPO Co	onfigurator : Version	2.2.0.0 - Examp	le Company			_		
	Home Accounts Call Centre	Company Contract Departm	ments Human Res	ources Inventory	Reporting Sale	s Scheduling	Security	Services	Static Data	-	- 8	×
A f	🎝 🔯 🔯 Save Layout	2			3							
	Workspaces 🖷	🔹 🚯 Refresh										
Add E	Edit Test Email 🖓 Save Filter											
Pro	cessing Format	4 Current										6
			////	Serial No : ??@Se	erialNo?? - Awaitin	a Conversion I	o asset, th	e destinati	on warehouse	is ??@Whsel	Name?	27
				L		-						
EmailLay	voutID EmailFlag	EmailSubject	EmailBody	This serial no was	s receipted by ??(	@EmpFullName	e??.					
۹ =	(D)	* <b>B</b> ¢	ROC 1									
•	1 fldAssetConversionEmail	Serial No : ??@SerialNo?? - Awaiting C.	. html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	2 fldClosedCall	Call Reference : ??@CallReference??	<1DOCTYPE html									
	3 fldCompletedCall	Call Reference : ??@CallReference??	. html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	4 fldContractCRApprovalEmail	Contract CR Note : ??@CrNoteNo??	html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	5 fldCRApprovalEmail	Sales CR Note : ??@CrNoteNo?? - Aw	. html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	6 fldCTRTApprovalEmail	Contract : ??@ContractNo?? - Awaitin	html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	7 fldCTRTCriticalAggMeterChan	Contract : ??@ContractNo?? - Critical	html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	8 fldCTRTCriticalChanges	Contract: ??@ContractNo?? - Critical.	html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	9 fldCTRTCriticalFeeChanges	Contract : ??@ContractNo?? - Critical	html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	10 fldCTRTCriticalItemChanges	Contract : ??@ContractNo?? - Critical	html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	11 fldCTRTCriticalMeterChanges	Contract : ??@ContractNo?? - Critical	html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	12 fldCustomerRelease	Customer: ??@CustomerName?? - A	html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	13 fldInProgressCall	Call Reference : ??@CallReference??										
	14 fldNewCall	Call Reference : ??@CallReference??										
	15 fldOnHoldCall	Call Reference : ??@CallReference??										
	16 fldPartRequestApproved	Part Request : ??@DocNo?? - Approv	html</td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>									
	17 fldPartRequestAwaitingApp	Part Request : ??@DocNo?? Awaiting										
	18 fldPMNGProjAssStatusChange	Project Reference : ??@ProjectRef??,										
	19 fldPMNGProjAssStatusChange											
	20 fldPRApprovalEmail	Purchase Requisition : ??@PRCode??										
	21 fldPREQWorkFlowApproved	Purchase Requisition : ??@PRCode??										
	22 fldPREQWorkFlowDedined	Purchase Requisition : ??@PRCode??										
	23 fldPREQWorkFlowNew	Purchase Requisition : ??@PRCode??										
	24 fldPRTRGoodsAvailableEmail	The part request : ??@DocNo?? - has										
	ar Albour Iri	al i recorde i	-incomposite t									

## **GENERAL BPO2 INTERFACE FUNCTIONALITY**

In this screen there are also general BPO2 interface functionalities:

- 1. Format:
- Save Layout
- Workspaces
- Save Filter
- 2. Current:
  - **Refresh**: Clicking on this button will update the currently displayed page.
- 3. Open Windows:
  - Open Windows
- 4. Data Grids:
  - Refer to <u>Using BPO Data Grids</u> and <u>Data Grid Filtering</u> for further information regarding data grid functionality that can be applied in Email Designer.



	Home Accounts Call Centre	Company Contract Departm	ents Human Res	ources Inventory Reporting Sales Scheduling Security Services Static Data — dP
)rag a col	umn header here to group by that columr	1	/	Serial No : ??@SerialNo?? - Awaiting Conversion to asset, the destination warehouse is ??@WhseName??
EmailLa	youtID EmailFlag	EmailSubject	EmailBody	This serial no was receipted by ??@EmpFullName??.
-	4 <b>0</b> 0	1 <b>0</b> 0	10c 📩	
	1 fldAssetConversionEmail	Serial No : ??@SerialNo?? - Awaiting C	html</td <td></td>	
	2 fldClosedCall	Call Reference : ??@CallReference??	html</td <td></td>	
	3 fldCompletedCall	Call Reference : ??@CallReference??	html</td <td>4</td>	4
	4 fldContractCRApprovalEmail	Contract CR Note : ??@CrNoteNo??	html</td <td></td>	
	5 fldCRApprovalEmail	Sales CR Note : ??@CrNoteNo?? - Aw	html</td <td></td>	
	6 fldCTRTApprovalEmail	Contract : ??@ContractNo?? - Awaitin	html</td <td></td>	
	7 fldCTRTCriticalAggMeterChan	Contract : ??@ContractNo?? - Critical	html</td <td></td>	
	8 fldCTRTCriticalChanges	Contract : ??@ContractNo?? - Critical	html</td <td></td>	
	9 fldCTRTCriticalFeeChanges	Contract : ??@ContractNo?? - Critical	html</td <td></td>	
	10 fldCTRTCriticalItemChanges	Contract : ??@ContractNo?? - Critical	html</td <td></td>	
	11 fldCTRTCriticalMeterChanges	Contract : ??@ContractNo?? - Critical	html</td <td></td>	
	12 fldCustomerRelease	Customer : ??@CustomerName?? - A	html</td <td></td>	
	13 fldInProgressCall	Call Reference : ??@CallReference??	html</td <td></td>	
	14 fldNewCall	Call Reference : ??@CallReference??	html</td <td></td>	
	15 fldOnHoldCall	Call Reference : ??@CallReference??	html</td <td></td>	
	16 fldPartRequestApproved	Part Request : ??@DocNo?? - Approv	html</td <td></td>	
	17 fldPartRequestAwaitingApp	Part Request : ??@DocNo?? Awaiting	html</td <td></td>	
	18 fldPMNGProjAssStatusChange	Project Reference : ??@ProjectRef??,	html</td <td></td>	
	19 fldPMNGProjAssStatusChange	Project Reference : ??@ProjectRef??,	html</td <td></td>	
	20 fldPRApprovalEmail	Purchase Requisition : ??@PRCode??	html</td <td></td>	
	21 fldPREQWorkFlowApproved	Purchase Requisition : ??@PRCode??	html</td <td></td>	
	22 fldPREQWorkFlowDeclined	Purchase Requisition : ??@PRCode??	html</td <td></td>	
	23 fldPREQWorkFlowNew	Purchase Requisition : ??@PRCode??	html</td <td></td>	
	24 fldPRTRGoodsAvailableEmail	The part request : ??@DocNo?? - has	html</td <td></td>	
	ar filosuu i ri	T I I I ADDRESS I	-incompeting 1	

# ADD A NEW TEMPLATE

This button allows users to create a template for an <u>existing</u> company email flag.

۰ 🔘	Email Template Listing for Company : Example Company - BPO Configurator : Version 2.2.0.0 - Example Company							(								
	Home Accourt	ts Call Centre	Company	Contract	Departments	Human Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data		-	₽ X
GD Add	Edit Test Email	<ul> <li>Image: Save Layout</li> <li>Image: Workspaces ▼</li> <li>Image: Save Filter</li> </ul>	🍪 Refresh													
	Processing 4	Format	Current	4												$\sim$

1. The Edit Email screen will open with a blank template loaded.

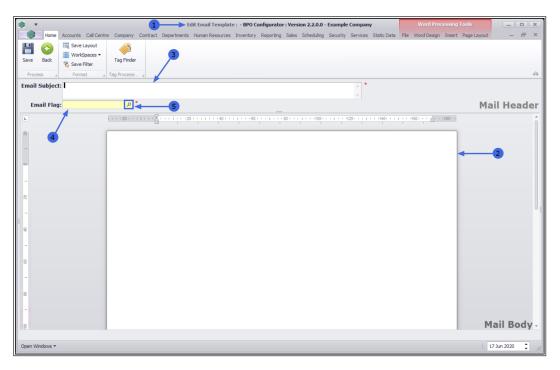
Here, the user can:

- 2. Set the layout,
- 3. Type in the Email Subject line
- 4. Link an Email Flag to the template

It is important to note that the Email Flag should be selected before editing the document. Any edits made <u>before</u> the flag is selected will be overridden.



5. Click on the Search button in the Email Flag field.



- 1. The *Please select an email flag* screen will pop up.
- 2. Select the flag that you wish to create a template for.
- 3. Select Ok.

**Note**: Only flags already set up in the system database will be displayed here. The system does not allow the user to create email flags from the designer.



Save Back	Tag Finder	Home	ase select an email flag.			
Process Format	a Tag Processi a					~
Email Subject: Email Flag:	* م	Proc			\$	Mail Header
L	· · · · 20 · · · · · · · · · · · · · · ·	CO. 1	column head 3 e to grou	b by that column	fid Value	î
8		9 100				
			RApprovalEmail	Requistion Approval Required	Yes	
-			RApprovalEmail	CR Note Approval Required	Yes	
			TRTApprovalEmail	Contract Approval Required	Yes	
			upplierInvEmail	Supplier Invoice Authorisation Required	Yes	
_		fidPF	RTRGoodsAvailableEmail	Part Request Goods Available Required	Yes	
		fidAs	ssetConversionEmail	Asset Conversion Required	Yes	
20		flds/	ADJRequestEmail	Stock Adjustment Authorisation Required	Yes	
		fldCT	TRTCriticalChanges	Contract Critical Changes	Yes	
		fldW	RRaised	Work Request Raised	Yes	
		fidNe	ewCall	New Call Email	Yes	
40		fidIn	ProgressCall	In Progress Call Email	Yes	
		fidOr	nHoldCall	On Hold Call Email	Yes	
		fidSu	uspendedCall	Suspended Call Email	Yes	
8			ompletedCall	Completed Call Email	Yes	
	2—		osedCall	Closed Call Email	Yes	
-			echAssignment	Technician Assignment Email	Yes	
			ustomerRelease	Customer Released Email	Yes	
8			uoteStatus	Quote Status Change Email	Yes	
			cketAssignment	Ticket Assignment Email	Yes	
		fidPF	RWorkFlow	Purchase Requisition Approval WorkFlow	Yes	
8						Mail Body

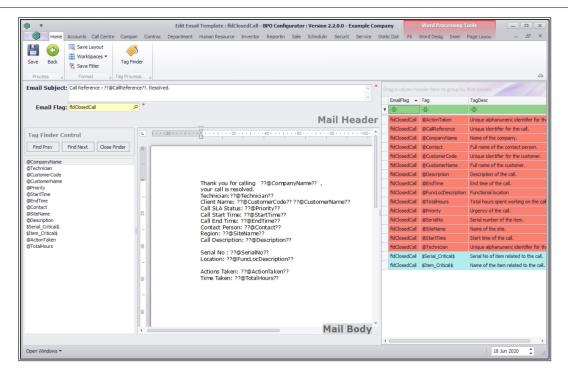
Once the email flag is selected, the template and associated data is taken from the database.

# WORD PROCESSING TOOLS

You can use the Word Processing Tools ribbon to edit the template. This ribbon contains the usual document editing tools such as picture inserts, table creation and word formatting.



## Email Designer



MNU.163.001

Help v2.5.1.4 - Pg 9 - Printed: 27/06/2024

CO3 Technologies (Pty) Ltd © Company Confidential