

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.

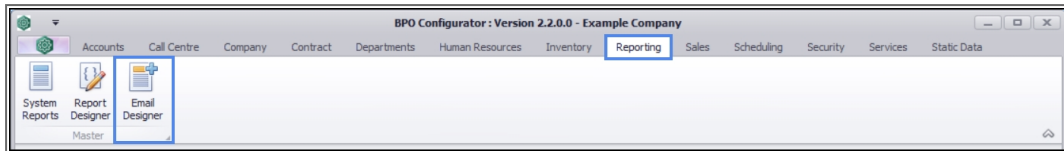
User Requirements

- 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

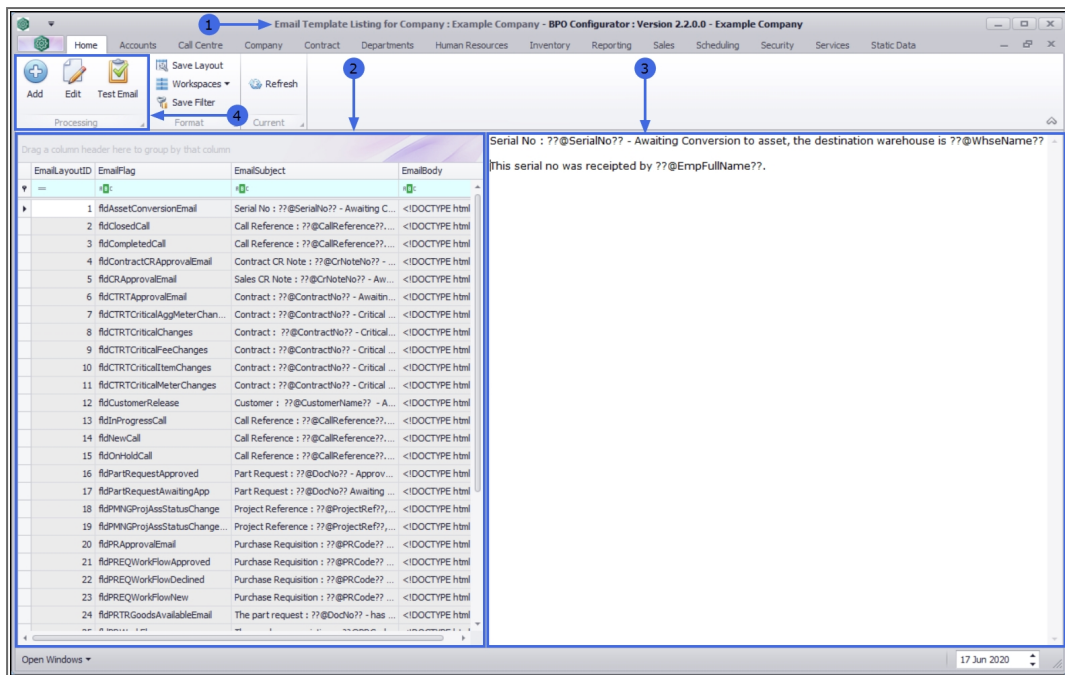
- BPO2 v2.4.0.1 or later.
- BPOConfigurator v2.2.0.0 or later.
- Ensure that users have run the latest upgrade script necessary, to use the new email designer module.

Ribbon Access: *Configurator > Reporting > Email Designer*



TEMPLATE LISTING SCREEN - INTERFACE

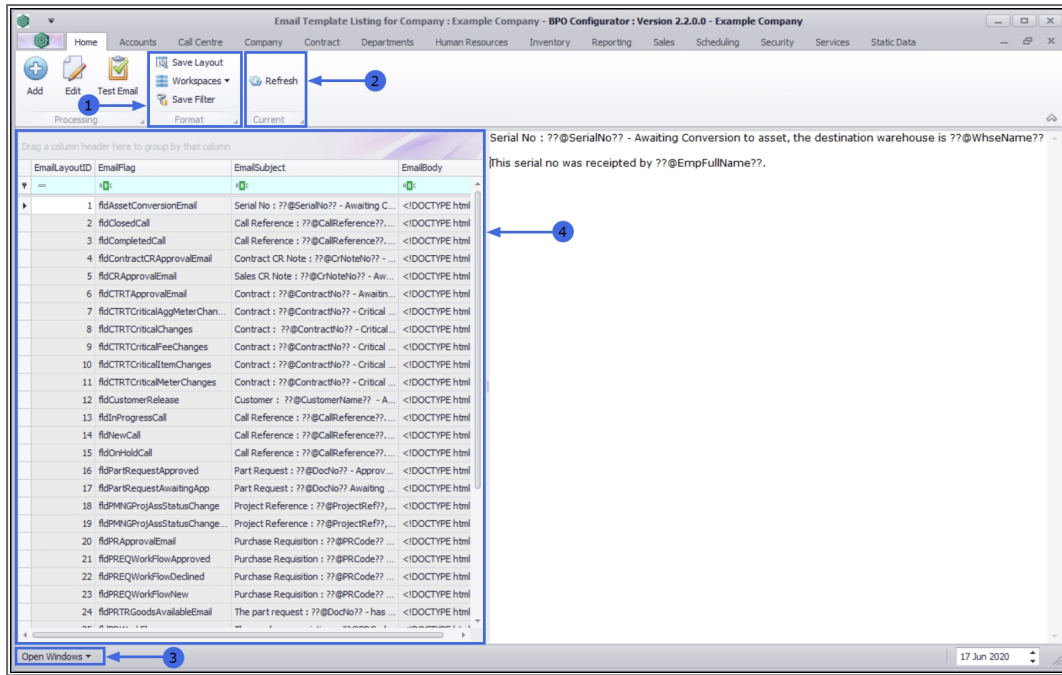
1. The **Email Template Listing for Company: [Company Name]** screen will open.
2. The left side of this screen contains a data grid of all the email templates currently in use by the system.
3. The right hand side of this screen contains the **Previewer** which displays the layout of the template selected on the left. This layout cannot 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.



GENERAL BPO2 INTERFACE FUNCTIONALITY

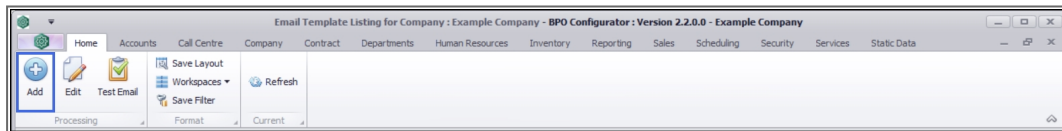
In this screen there are also general BPO2 interface functionalities:

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 [Using BPO Data Grids](#) and [Data Grid Filtering](#) for further information regarding data grid functionality that can be applied in Email Designer.



ADD A NEW TEMPLATE

This button allows users to create a template for an existing company email flag.



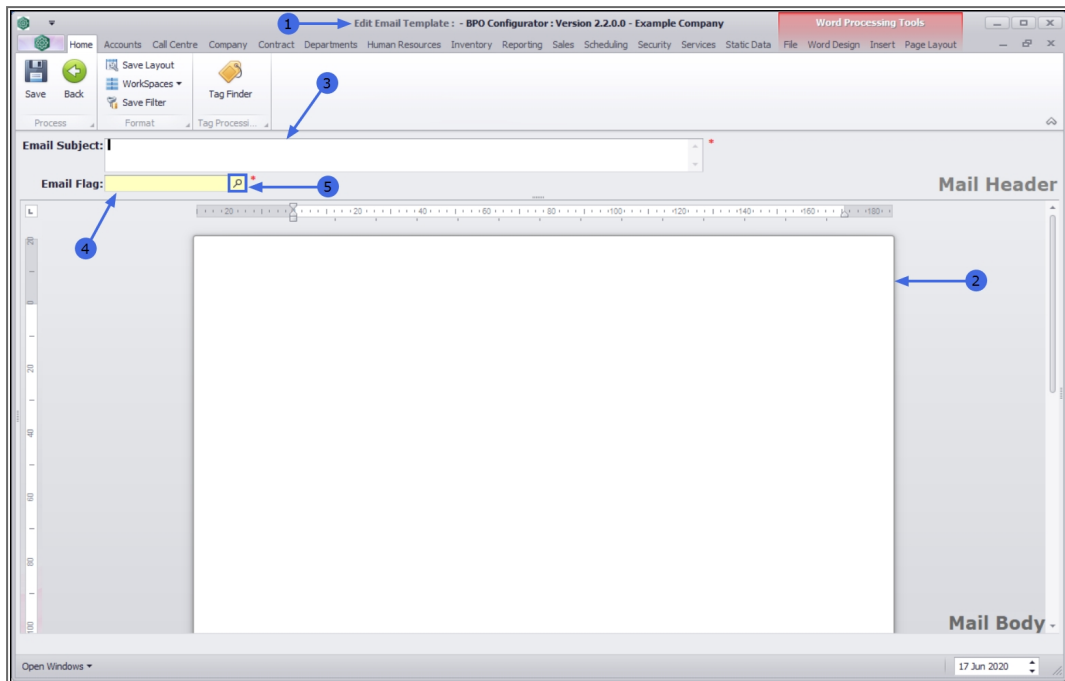
1. The Edit Email screen will open with a blank template loaded.

Here, the user can:

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

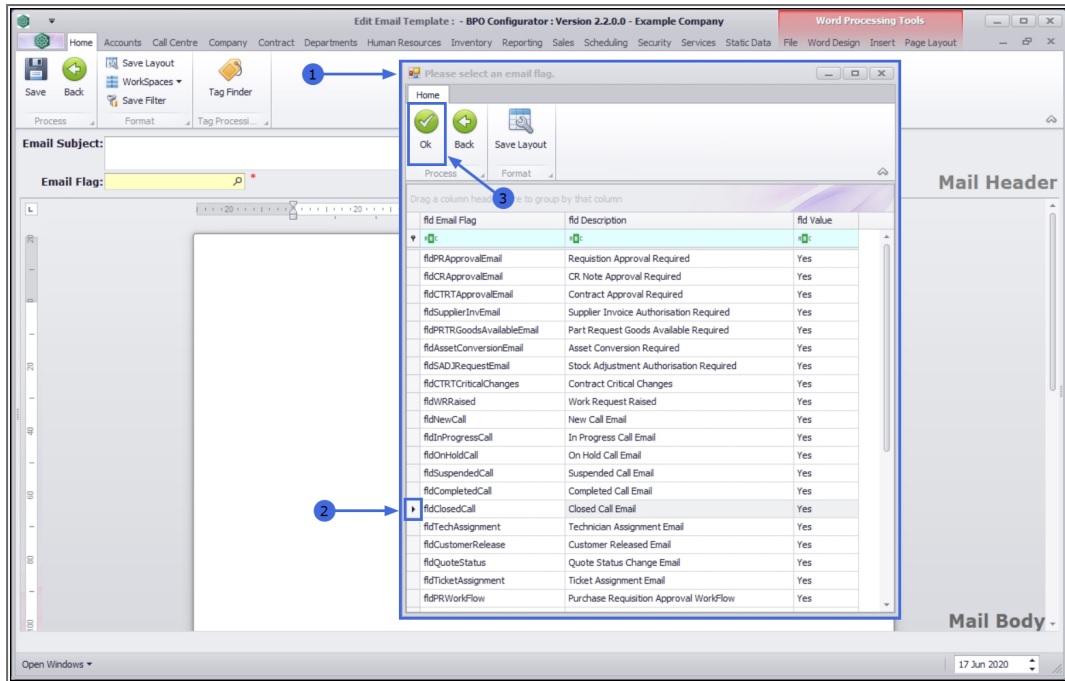
It is important to note that the Email Flag should be selected before editing the document. Any edits made before the flag is selected will be overridden.

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.

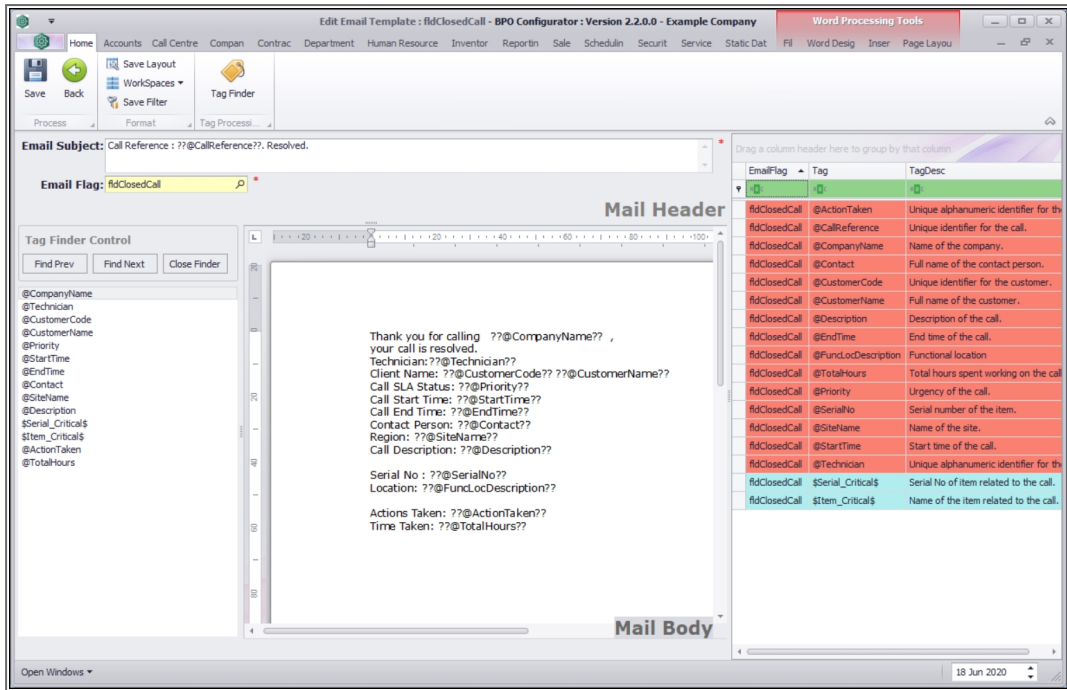
Note: Only flags already set up in the system database will be displayed here. The system does not allow the user to create email flags from the designer.



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.



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