

Email Notification

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Email Notification Setup [WIP]

Setting up of multiple letters to action to customer contact.

Multiple template letters

Link template letter to an action

Actions as follows:

1. Multiple Asset actions added eg
 1. check out - Flag on to run Return date emails
 2. check in - Flag off to Not run Return date emails
 3. Other actions
2. Multiple email out based on X number of days before and after check return Date
 1. Letter out X number of days after check out No 1
 2. Letter out X number of days after check out No 2
 3. Asset return date, letter out three days before return day
 4. Letter X number of days after Return Date
 5. Letter X number of days after Return Date No 2
 6. Letter X number of days after Return Date No 3
3. Letter on day of Return Date

Ensure we have a flag active on asset for letters out

Ensure that there is a flag to log check out to run

Setup Schedule task to be run each day to check all schedules

Notes

- Add in an Asset Action that puts the flag on for email in or out
- Check that we are able to put in data replacement
 - Contact first name and last name
 - Company name
 - Stock item code and description
- Add an additional tab to allow internal user to be copied in the email

Asset and Actions setup

Settings for the following areas need to be setup in order for the email to go out.

Asset Setup

Return Date Email Letters	Enable this function for this asset to activate Return Date email letters
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Edit Asset Item

Asset Item Detail

AttachmentsMemoCreate ReminderPrint DetailView AttachmentsAction:Close

AssetFixed AssetVehicle RegisterCRM

MainGeneralInfoLinked ItemsDoc LinksAsset Action LogMaintenanceCustom

Asset No.:GL9585Print

Asset Name:Piston Head wizard

Asset Category:General

Issued To:Malcolm Granville

Asset Location:Auckland

Condition:Used

Customer:NEW-59 - The Flooring RoomView

Brand:Vehicles

Make:Commercial

Model:4x4

Asset Group:

Link to Parent:Remove

Comment:

Reference:Piston

Description:Piston Head for 4x4

Return Date:2024-11-14Out



Default Image:Malcolm 2023-05-15 20:56:25

Return Date Email Letters

Save & NewSave & CloseSaveClose

Check Out

Action setup

When the Enable Email letter is active, then send out an email to the customer contact with the specific letter template.

If an internal user is set to also receive the email, then copy the internal user.

If the company does not have a contact or the contact does not have an email, then no email goes out to customer or internal user.

The screenshot shows the 'Asset Action Maintenance' dialog box with the 'Email Letter' tab selected. The 'Enable Emailing' checkbox is checked. The 'Code' and 'Description' fields both contain 'Check Out'. The 'Action' dropdown is set to 'Log Action', 'State' is 'Out', and 'Action Icons' is 'Check Out'. The 'Sequence No.' is 3. 'Show Return Date' and 'Count' are checked, while 'Allow Next Action' is unchecked. The 'Next Action' dropdown is empty. The 'Active' checkbox is checked. At the bottom, there are three buttons: 'Enable Email Letter' (checked), 'Letter template' (empty), and an empty text field. The bottom bar contains 'Save & New', 'Save & Close', 'Save', and 'Close' buttons.

Field	Value
Enable Emailing:	☒
Code:	Check Out
Description:	Check Out
Action:	Log Action
State:	Out
Action Icons:	Check Out
Sequence No.:	3
Show Return Date:	☒
Count:	☒
Allow Next Action:	☐
Next Action:	
Active:	☒

Enable Email Letter ☒ Letter template

Save & New Save & Close Save Close

Email letter tab

Email letter tab becomes active if the Enable email letter is ticked / active.

This lists all internal users

×

Asset Action Maintenance

⚙️ ?

Basic

Email

Email Letter

Available

Selected

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1

2

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User Name

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Page 1 of 1

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Malcolm Granville - malcolm@erpsol...

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Save & New

Save & Close

Save

Close

Asset Email Letter Templates

Setup multiple letters to be sent out

Asset Tracker > Configuration > Email Letter Template

New Menu Item called "Email Letter Template"

Asset Tracker

Configuration

- Debtor Setup
- Supplier Setup
- Inventory Setup
- Unit Of Measure Setup
- Policy Control
- Incident Setup
- Group Code Setup
- Brand Make Model Setup
- Asset Group Setup
- Asset Action
- Asset Condition
- Asset Location
- Issue To Users
- Email Letter Templates**

Email Template Letters

Search Add Edit Delete Print

Code:

Description:

Active: ☒

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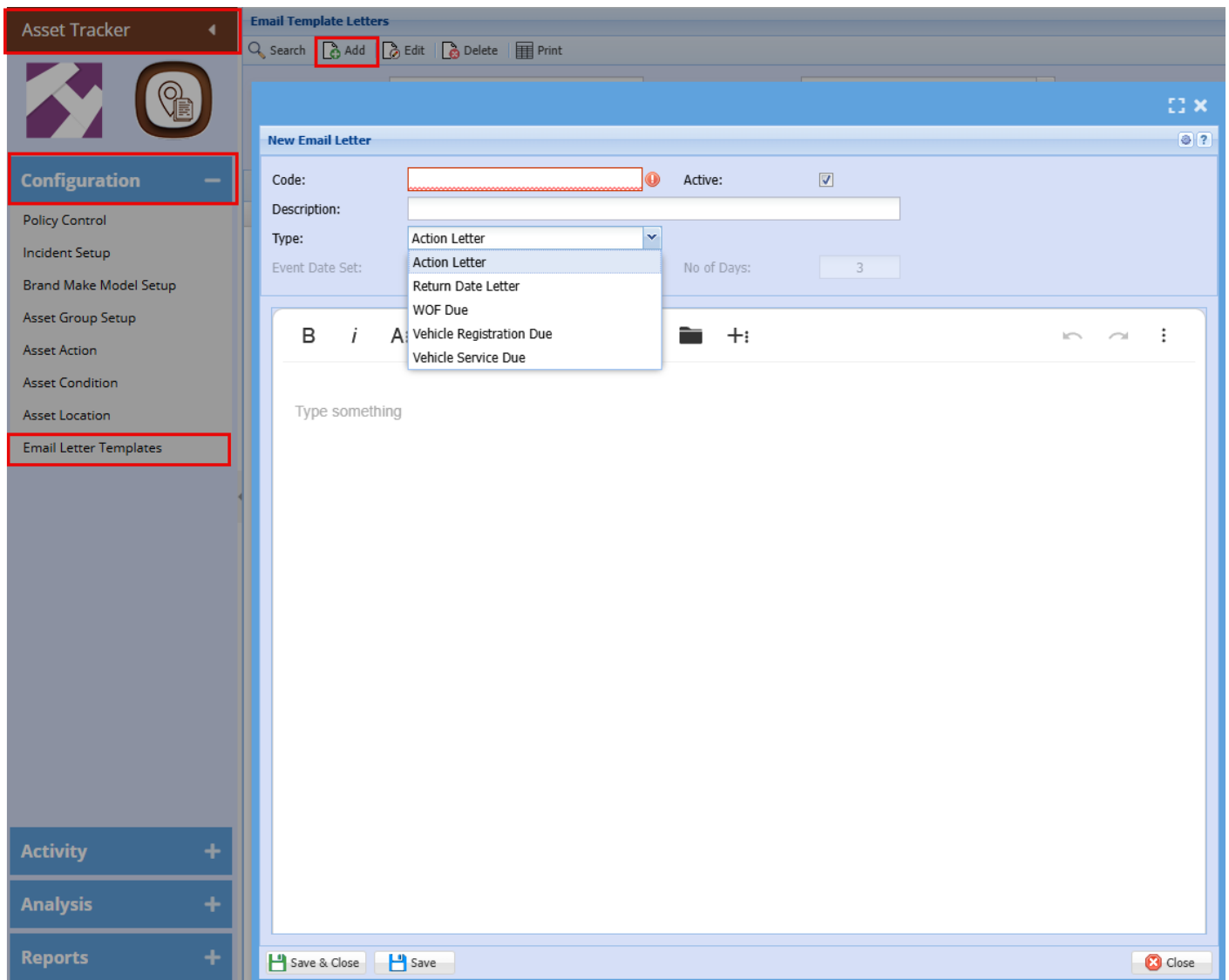
#	Code	Description	Type	Active	Return Date Set	Days
1	HEA	Health	Return Date Letter	Yes	Before	5
2	Sample	Sample Letter	Return Date Letter	Yes	After	5
3	Sample 2	Sample Letter	Return Date Letter	Yes	After	5
4	Sample 3	Sample Letter 3	Return Date Letter	Yes	After	5
5	TestCode1		Action Letter	Yes	On Day	
6	TestCode2		Action Letter	Yes	On Day	
7	TestCode400	Save with new code test	Action Letter	Yes	On Day	

Add / Edit Email Letter

The Email that is sent out must be embedded into the email with the Description of the Letter for the Header of the email.

Sencha latest version makes use of a text editor, see if we can use that to make up the letters.

This allows formatting and pictures to be embedded.



Placeholders

Placeholders can be added to the templates to be substituted with the values they reference when the email is sent.

For a piece of text to be identified as a valid placeholder and substituted it needs to be:

- On the same line
- Enclosed in square brackets
- Not contain embedded square brackets
- Less than 100 characters, including spaces and punctuation and excluding the square brackets, in length
- Match one of the placeholders in the table below. Spaces, punctuation and letter case are ignored. For example `[CustomerContactFullName]` or `[CUSTOMER_CONTACT_FULL_NAME]` will match the `Customer Contact (Full Name)` placeholder. The spaces and punctuation are optional and for readability only.

Placeholders	Substitution	Notes
[Customer Contact (Full Name)] [Full Name of Customer Contact] [Contact Person Name]	The first and last name of the Customer Contact separated by a space.	1, 2
[Customer Contact (First Name)] [First Name of Customer Contact] [Contact First Name]	The first name of the Customer Contact.	1, 2
[Customer Contact (Mobile)] [Contact Mobile] [Contact MOB]	The mobile number of the Customer Contact.	
[Customer Contact (Telephone)] [Contact Telephone] [Contact TEL]	The telephone number of the Customer Contact.	
[Customer Contact (Email)] [Contact Email]	The email address of the Customer Contact.	
[Action]	The description of the Action completed for the Action. For example "Check Out"	
[Action (Code)] [Code of Action]	The code of the Action completed for the Action. May match the description. For example "Check Out"	
[Assets (List)] [List of Assets]	A list of Assets for which the action is completed for. Each item in the list is the Asset Number, followed by a dash and then the Asset Name.	
[Asset Names (List)] [List of Asset Names]	A list of the names of the Assets for which the action is completed for.	
[Assets (Number)] [Number of Assets] [Asset Count]	The number of assets for which the action is completed for.	
[Assets (Total Count)] [Total Count of Assets]	The total count of all the assets for which the action is completed for.	
[Customer Company (Name)] [Name of Customer Company] [Debtor Name]	The company name of the customer	1

[Asset Return Date] [Asset Return Date (YYYY-MM-DD)] [Asset Due Date] [Asset Due Date (YYYY-MM-DD)]	The Return or Due Date of the asset in YYYY-MM-DD format. If there is more than one asset in the email then the first is selected.	
[Asset Return Date (D/M/YYYY)] [Asset Return Date (D/MM/YYYY)] [Asset Due Date (D/M/YYYY)] [Asset Due Date (D/MM/YYYY)]	The Return or Due Date of the Asset in D/M/YYY or D/MM/YYYY format (New Zealand) If there is more than one asset in the email then the first is selected.	
[Asset Return Date Days From/To] [Asset Due Date Days From/To] [Return Days] [Due Days]	The number of days before or after the return or due date If there is more than one asset in the email then the first is selected.	
[WOF Date] [WOF Date (YYYY-MM-DD)] [WOF Date (D/M/YYYY)] [WOF Date (D/MM/YYYY)]	The warrant of fitness date if the email template type is selected as "WOF Due". This should be the same as "Asset Due Date". If there is more than one vehicle in the email then the first is selected.	3
[Reg Date] [Reg Date (YYYY-MM-DD)] [Reg Date (D/M/YYYY)] [Reg Date (D/MM/YYYY)]	The vehicle registration date if the email template is selected as "Vehicle Registration Due". This should be the same as "Asset Due Date". If there is more than one vehicle in the email then the first is selected.	3
[Vehicle Reg] [Reg]	If the asset is a vehicle then the Vehicle registration number as set in the Vehicle Register form for the asset. If there is more than one vehicle in the email then then each subsequent item is preceded by a comma or "and" for the last item.	3
[Vehicle Description]	If the asset is a vehicle the Description as set in the Vehicle Register form for the asset. If there is more than one vehicle in the email then then each subsequent item is preceded by a comma or "and" for the last item.	3
[Vehicle Count]	The number of vehicle assets in the email	3

Notes

1. Used in CRM Email Templates also [WIP]

2. For CRM Email Template this placeholder can be substituted by value for the Company Branch contact person depending on the mailing list set up. [TBD]
3. Requires the asset to be marked as a vehicle.

Activate Asset mail out

Return Date

Asset Module > Action > "Main" Tab

- To activate the Mail out for each item the **"Return Date Email"** checkbox needs to be ticked at bottom of the **Asset Main** page, tick the **"Return Date Email"** checkbox to activate this mail-out.

Edit Asset Item

Asset Item Detail

AttachmentsMemoCreate ReminderPrint DetailView AttachmentsAction:Close

AssetFixed AssetVehicle RegisterCRM

MainGeneralInfoLinked ItemsDoc LinksAsset Action LogMaintenanceUnits Logged

Asset No.:100045Print

Asset Name:Zebra TC77 Scanner

Asset Category:Fixed Asset

Issued To:

Asset Location:Office Sydenham

Condition:Demo Unit

Customer:BAR005 - Barcode ProductsView

Brand:

Make:Zebra

Model:

Asset Group:

Link to Parent:Remove

Comment:

Reference:Android 13

Description:Rental Scanner

Rtn Date Emails:

Return Date: N/AIn



Default Image:1754448184046_2025-08-06_1443

Save & NewSave & CloseSaveClose

Available

Asset Return Date Scheduler

Setup a new schedule to run checks on due letters that are active on assets that are in an out status and have a return date.

Scheduled Tasks Search

Add Schedule

Edit Schedule

Delete Schedule

View Schedule Tasks Log

Start Schedule

Stop Schedule

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Displaying 1 - 36 of 36

#	Task Name	Task Code	Active	Status	Email List	Recipients	Run Now
13	Daily Inventory Valuation Report	Daily Inventory Valuation Report		Has not been schedul...		0	➔
14	Daily Stock Control Report (WIP			schedul...		1	➔
15	Daily Time Log Figures			schedul...		0	➔
16	Daily WIP Journal			schedul...		0	➔
17	Debit Order pending message			schedul...		0	➔
18	Email Daily Reminders			schedul...		0	➔
19	Email In Progress Sales Leads A			schedul...		0	➔
20	Email Open Service Requests			schedul...		0	➔
21	Emailing Schedule			schedul...		0	➔
22	Escalate outstanding reminders			schedul...		0	➔
23	Exchange Rate Update Fixer			schedul...		0	➔
24	Export Schedule			schedul...		0	➔
25	Fixed Asset Depreciation Sched			schedul...		1	➔
26	Recurring GL Journal Auto Proc			schedul...		0	➔
27	Recurring GRV Auto Processing			schedul...		0	➔
28	Retention Invoice Auto Processi			schedul...		0	➔
29	Retention Invoice Email Notifica			schedul...		0	➔
30	SL Budget Alert			schedul...		0	➔
31	SL Daily Log Figures			schedul...		0	➔
32	Time Log Budget Alert			schedul...		0	➔
33	Timelog budget recalculate			schedul...		0	➔
34	Timelog GPS import			schedul...		1	➔
35	Timelog GPS Report			schedul...		1	➔
36	Weather Regions Forecast Upda			schedul...		0	➔

Schedule Task Setup

Task Code:

Asset Email Letters on Return Date

Task Description:

Asset Email Letters on Return Date

Task To Be Executed:

do
##class(SCM

Run Task:

Once A Day

More Than Once a Day

Time Period Setup

Schedule Time:

00 Hrs 00 Min

Schedule Days:

Sun: ☒ Mon: ☒ Tue: ☒ Wed: ☒ Thu: ☒ Fri: ☒ Sat: ☒

Save

Close