

Email Template Letters

- [Email Template Letter Setup](#)
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Email Template Letter Setup

Email templates are **set up and maintained by the customer**. The system does not provide pre-configured content. Customers are responsible for creating, updating, and approving all email wording, layout, using the appropriate [placeholders](#).

There are **Five email template options**, each used for a different part of the system.

CRM > Configuration > Email Template

The screenshot shows the 'Email Template Letters' setup screen in a CRM system. On the left is a navigation menu with 'Configuration' highlighted and 'Email Templates' selected at the bottom. The main area contains form fields for 'Code', 'Description', and 'Active' (checked), along with an 'Email Type' dropdown menu. The dropdown is open, showing options: 'All', 'All', 'Customers', 'Suppliers', 'Job Management', and 'Job Receive Stock'. Below the form is a table with columns for '#', 'Code', and 'Description'. The table is currently empty.

#	Code	Description
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1: Customers:

This option is used for **Customer Batch Email Out**.

[Bulk Email Template Setup](#)

Email templates for **Customer mail-outs** are designed, created, and managed in the **CRM Module**

- Customer mail-outs uses a customer contact list that can also be customized.

[Creating a customer mailing](#)

2: Suppliers

This option controls emails sent to **suppliers**.

Email Template Setup

Email templates for **Supplier mail-outs** are **designed, created, and managed in the same location as customer Emails** within the system and for email type you will select Suppliers.

Uses a separate template specific to supplier communication

3: Job Management

This option is used for emails generated through the **Job Management** and are designed, created, and managed in the **CRM Module**.

4: Job Receive Stock

This option is used when emails are sent during the **Job Receive Stock** process. **Job receive Stock** email templates are designed, created, and managed in the **CRM Module**

For the email to be triggered, stock items must be correctly configured with the appropriate setting enabled.

[Stock Item Setup](#)

- This email is triggered when stock is received against a job

5: Asset Email Out:

This option is used for **Asset Email Out via the Webatar App**

Asset Tracker > Configuration > Email Letter Template

These emails can be Scheduled as needed for Asset Allocation, Service dates, Return dates etc.

[Asset Email out Setup Manual](#)

The screenshot displays the 'Email Template Letters' configuration window in the Asset Tracker application. The left-hand navigation menu is open, with 'Configuration' and 'Email Letter Templates' highlighted. The main window, titled 'New Email Letter', features several input fields: 'Code' (empty), 'Description' (empty), 'Type' (a dropdown menu currently showing a list of options including 'Action Letter', 'Return Date Letter', 'WOF Due', 'Vehicle Registration Due', and 'Vehicle Service Due'), 'Event Date Set' (empty), 'No of Days' (set to 3), and 'Active' (checked). Below these fields is a large text area for composing the email body, with a placeholder text 'Type something'. At the bottom of the window, there are three buttons: 'Save & Close', 'Save', and 'Close'.

Email templates for **Asset Actions** are **designed, created, and managed within the Asset Module**

- Asset mail out are sent to the specific staff member being allocated the asset through the Webatar App.
- To activate the Mail out for each item the **“Return Date Email”** checkbox needs to be ticked at bottom of the **Asset Information** 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

Email Template Letter Place Holders

Place holders used in Email Template

Customer Bulk emails

Supplier Bulk emails

Manage Job

Job Receive stock email

Job Checklist email assign to

Assign to employee	
Job Description	
Asset Number	
Asset Name	
Checklist Number	
Checklist Description	