

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 displays the 'Email Template Letters' configuration interface. On the left, the 'Configuration' menu is visible, with 'Email Templates' selected. The main form area includes fields for 'Code', 'Description', and 'Active' (checked). The 'Email Type' dropdown menu is open, showing the following options: 'All', 'All', 'Customers', 'Suppliers', 'Job Management', and 'Job Receive Stock'. The 'All' option is currently selected.

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 interface within the Asset Tracker application. The left-hand navigation menu is visible, with 'Configuration' and 'Email Letter Templates' highlighted. The main content area shows a 'New Email Letter' form. The form includes fields for 'Code', 'Description', 'Type' (a dropdown menu), 'Event Date Set', 'No of Days', and an 'Active' checkbox. The 'Type' dropdown is currently open, showing a list of options: 'Action Letter', 'Action Letter', 'Return Date Letter', 'WOF Due', 'Vehicle Registration Due', and 'Vehicle Service Due'. The 'Active' checkbox is checked. The 'No of Days' field is set to 3. The bottom of the form has 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

Revision #12

Created 7 April 2026 23:39:44 by Pamela

Updated 10 April 2026 03:58:44 by Pamela