



ServiceLedger Getting Started Guides

Getting Started with Work Order Email Notification

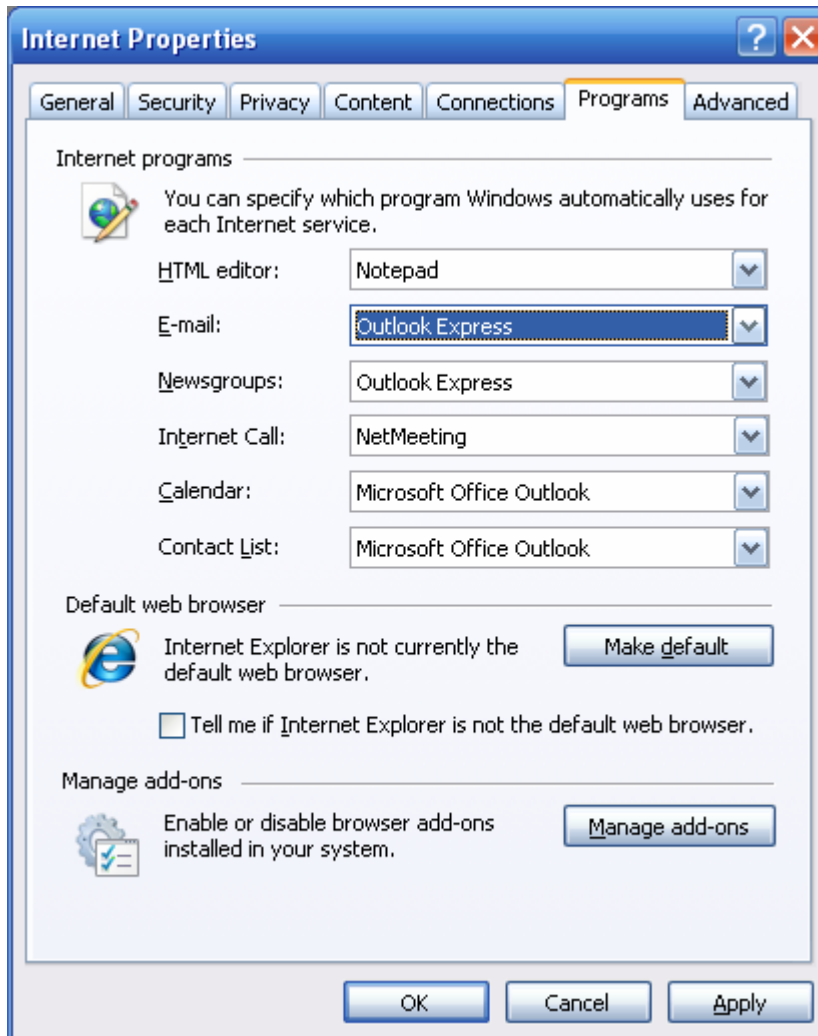
You can set ServiceLedger up to send status notification e-mails your customers and (optionally) a service manager whenever certain key events happen in the lifetime of a work order. This feature requires a working e-mail setup and a dedicated computer to send these notifications.

Verifying your e-mail setup:

Before you can start sending out notifications, you will need to choose a computer to send the mail, and set ServiceLedger's e-mail options up so that this computer will be able to send e-mails automatically. The most common setup is described below.

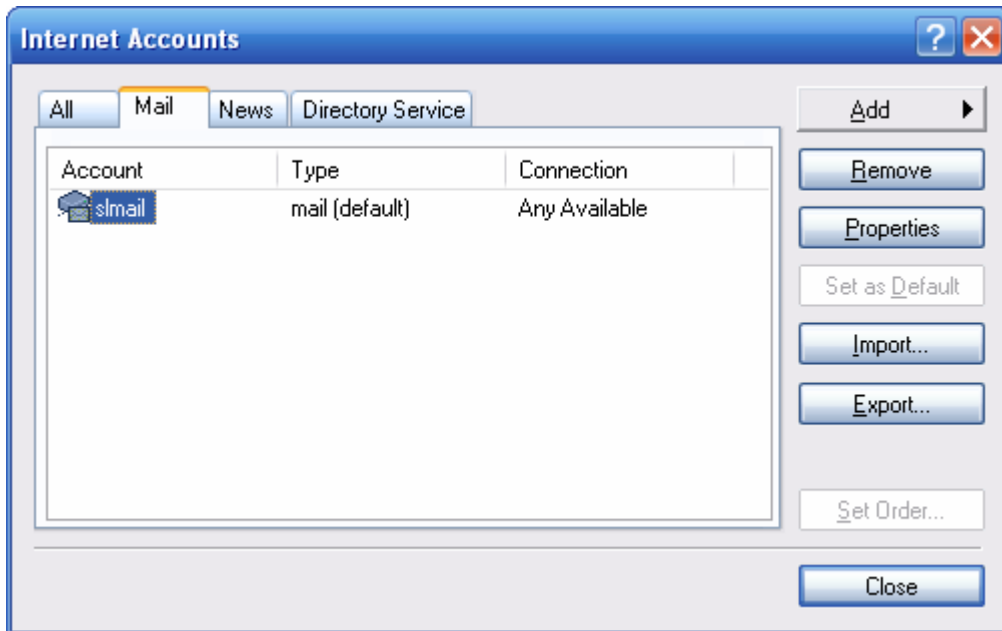
Usually, the easiest way to send out automatic e-mail notifications is to configure Outlook Express as the default e-mail client on your notification machine and allow it to automatically send out e-mail notifications without intervention on your part.

Setting the Default E-mail Client:



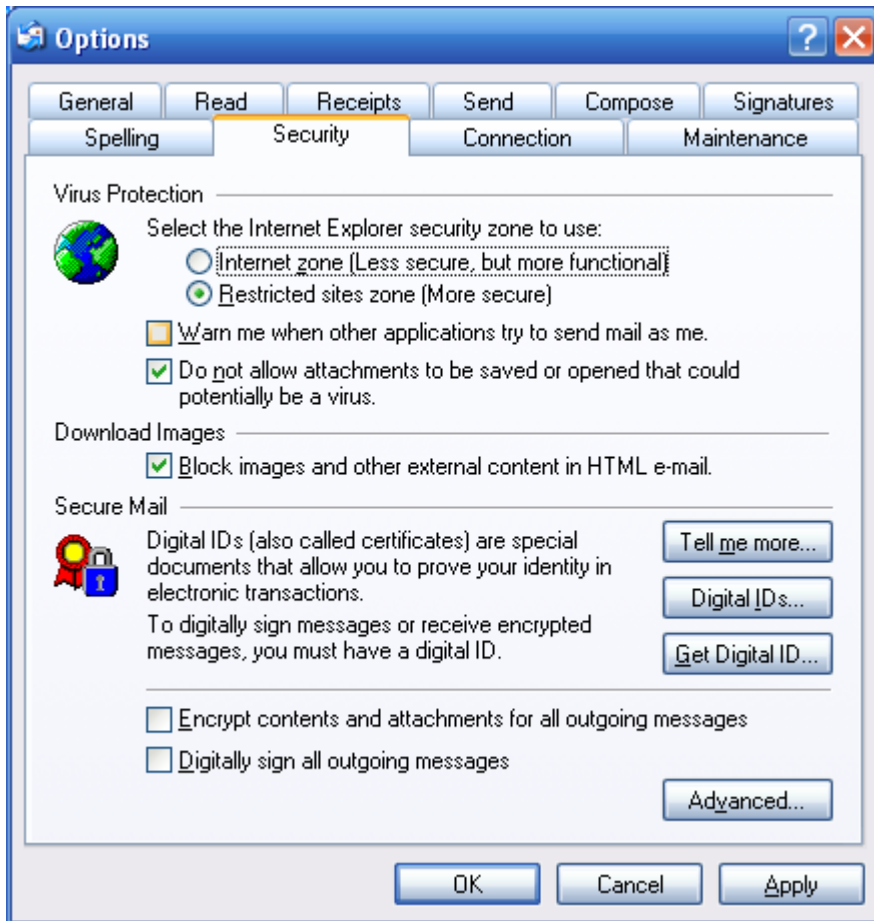
The first part of this—setting up Outlook Express as the default e-mail client—can be done from the **Internet Options** control panel. In the **Programs** tab of this control panel, you can use the list box by **E-mail:** to specify which e-mail client should handle messaging requests. In this box, you should choose **Outlook Express**.

Adding an Account to Outlook Express:



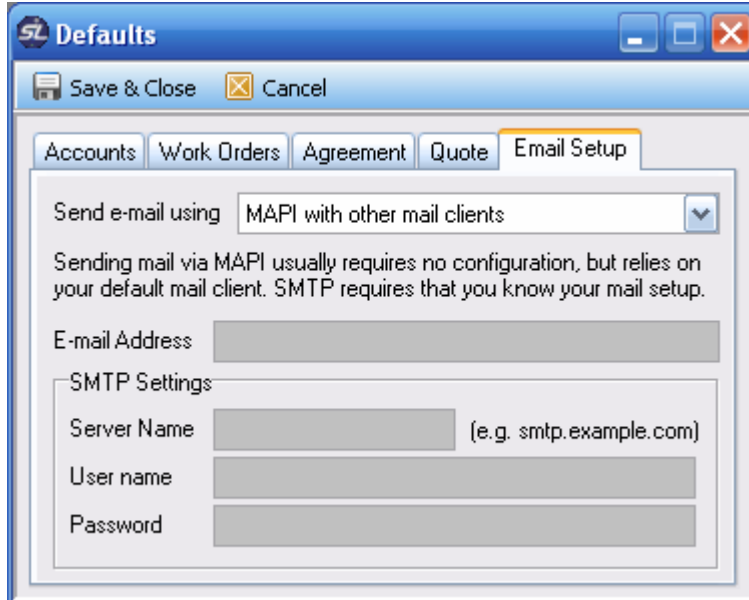
Now, you'll need to configure Outlook Express to, at a minimum, reach your SMTP server in order to send e-mail. Usually, you'll want to set it up with access to an e-mail inbox as well, even if you won't actually use it to receive mail. This is done under **Tools -> Accounts**. You will need to know your POP3/IMAP and your SMTP server in order to set up an account—ServiceLedger does not know and cannot provide these values for you. There are an abundance of articles available on the internet that can provide assistance with setting up e-mail accounts. If you're having trouble, please contact your network administrator or Internet Service Provider for extra instructions.

Allowing E-mails from External Applications:



Once you've configured Outlook Express to send and receive mail, (we recommend you verify that it can send mail by sending yourself a test message,) you should set it up to allow other programs, like ServiceLedger, to send messages automatically. This can be found under **Tools -> Options**, in the **Security** tab. In order to allow this, you'll need to make sure the **Warn me when other applications try to send mail as me** checkbox is NOT checked.

Setting ServiceLedger's E-mail Preferences:



Finally, you'll need to configure ServiceLedger to use your default MAPI client (Outlook Express) to send e-mail. This can be done in the **Email Setup** tab of the **Defaults** window, under **Administration -> Defaults**. The appropriate choice for Outlook Express is **MAPI with other mail clients**.

Testing your E-mail Setup:

Once this is done, you can test that ServiceLedger is able to send mail via Outlook by going to **Help -> Email ServiceLedger Sales**, then changing the To: address to your own address and trying to send a test message. If everything is configured properly, once you hit **Send** in ServiceLedger's mail window, Outlook Express will automatically place the message in your outbox and send it within a few minutes.

At no point in this process should you see Outlook Express ask whether it's alright to send the message or show the message in a Compose window.

Setting up Notifications:

Once you have a working e-mail setup, you can configure e-mail notifications in ServiceLedger by going to **Service | E-mail Notification Setup** in the main menu. When you do this, you will be presented with the following window.

Setting up E-mail Notification

Condition	Template
When a new work order is created	Default New Work O
When a work order is reassigned	
When work order status changes to New	
When work order status changes to Closed	
When work order status changes to Scheduled	Default Status Chang
When work order status changes to Past-Due	
When work order status changes to Cancelled	
When work order status changes to Completed	
When work order status changes to Hold	Default Status Chang
When work order status changes to Estimate	
When work order status changes to Assigned	

Name of computer that should process status e-mails: SL07

Address e-mails should claim to come from: test@jiv.us

Internal address to send an extra copy to: john@jiv.us
(The main copy is sent to the customer)

OK Cancel

In this window, you are able to choose which events should generate e-mail notifications, and choose the templates that should be used when these events happen. When the conditions for an event are satisfied, an e-mail will be sent to the customer's main e-mail address using the template chosen.

If no template is chosen for a particular event, no e-mails will be sent for that event.

Additionally, you will need to specify:

- The name of the computer you configured to process these e-mails above, which can be found in the properties for **My Computer**, under the **Computer Name** tab. This is the value listed for **Full computer name**, up to but not including the first period. For example, if the full computer name is slserver.example.com, the computer name would be slserver.
- The e-mail address that these e-mails should appear to come from. If you are using Outlook Express, this may be replaced by the actual account you configure Outlook Express for.

Optionally, you can set up an internal e-mail address that copies of these notifications will be sent to. In the event that an e-mail cannot be sent because a

customer's e-mail address is not defined, it is this address that will receive notification of the problem.

It is recommended that you set this address up to be that of your service manager or lead technician.

Creating New Text Templates

ServiceLedger comes, by default, with three text templates to support the E-mail Notification module. These are:

- Default New Work Order Notice
- Default Reassignment Notice
- Default Status Change Notice

You can alter the text of these notices, or set up new templates, using the Text Template list, available under **Administration | Text Templates**.

The only type of template that is available to the notification module is type **Work Order**, which these three default templates all use. If you create additional templates, you should choose this as the template type.

The actual text of the template is sent as a plain-text e-mail to the customer and, if defined, service manager. Rich text, pictures, and advanced formatting are supported by Text Templates in general, but will be ignored in status notification e-mails.

Apart from plain text, it is also possible to enter certain special values in a template that will either (1) be replaced with data from the specific work order that the template is being used for, or (2) be removed and instead used as another part of the e-mail.

Field replacements, the first of these two special kinds of text, have a format like: `<%=table.field_name%>` OR `<%=table.link_field>link_table.link_field.field_name%>`

If you have any questions about what fields are available, please consult the Text Template documentation or post your questions to the ServiceLedger forums under the "Technical, Dev, Imports, Exports & Automation" forum.

Subject replacement, the second kind of special text, must be the first line of your text template, and must read:
`subject: (text you want to appear in the subject line)`

You may use field replacements in the subject line, just as you would anywhere else. The Default New Work Order notice gives a good example of how to do Subject replacement.