

Item Reminders

Item Scheduled Reminder

We added the ability to auto send work order email reminders for schedule repair appointments to the following individuals assigned to the Work Order Staff, Supervisor, Staff 2, Vendor, Primary Owner or the Secondary Owner.

Note: The administrator can setup the Item Reminder by going to Tools → System Setup → Reminders.


| System Information | | | | | | | |
|--------------------------------|--------------------------------|-----------------|---------------|-------------------|----------------------|-------------------|----|
| Settings | | Locations | | Sites | | Employees | |
| Categories | | Vendor Portal | | Project Portal | | Budget Factor | |
| Plans | | Options (Plans) | | Billing | | Quality Processes | |
| Logbooks | | Task Templates | | Notifications | | Reminders | |
| Item Reminders | | | | | | | |
| Name | Email/Text To | # Of Days | Time Opera... | Date | Item Status | Recurs | Ir |
| Due Today | Staff | 1 | On | Due Date | Work Order Scheduled | 1 | 1 |
| Overdue | Vendor | 1 | After | Due Date | Work Order Scheduled | 1 | 1 |
| Homeowner Appointment Reminder | Primary Owner, Secondary Owner | 2 | Before | Repair Date Start | Work Order Scheduled | 1 | 1 |
| HO Appt 1 Day Reminder | Primary Owner, Secondary Owner | 1 | Before | Repair Date Start | Work Order Scheduled | 1 | 1 |
| Completed | Primary Owner | 0 | On | Date Completed | Work Completed | 1 | 1 |

Page 1 of 1 | 1 - 5 of 5 items

An email template will need to be created.

Example of the Email Reminder sent

Thu 1/25/2018 2:45 PM

 MailService@servicesoftwareinc.com on behalf of dawn@servicesoftwareinc.com

Dixon Quality Roofing Work Order *SCHEDULED REMINDER*****

To: Dawn Bryant

Message

Hello:

This is a reminder that the following work has been scheduled for **1/25/2018** at **1:00 PM**

Work needs to be performed: RFG-Roofing/Shingles
Please replace the damaged shingles with Timberline HD Pewter Gray. **Roof damage, due to high winds.

The job contacts are *Mary Ann Jones, Danielle Smith*
 The Job is located at: **369 3rd Street Jax Beach, FL 32250**

If there is an issue with the schedule or you have any questions please contact *Dawn Bryant* at (303) 987-6543. Thank you!

Item Reminders

Item Completed Reminder

An email when an item is completed can be sent – it can be done through Reminders (System Settings->Reminders). You can set up an email template that is sent to the Supervisor, Staff, Vendor, or Primary/Secondary Owner when the item has been completed. In the example below I have set a reminder to be sent when the Date has been completed and the Item Status is set to Work Completed and sends out the email to the Supervisor (with the template A Test

| System Information Settings Regions Sites Employees Categories Vendor Portal Project Portal Budget Factor Plans | | | | | | | | |
|---|--------------------|-----------|---------------|------------------------|----------------------|--------|-----------------|-------------|
| Options (Plans) Billing Inspections Logbooks Task Templates Notifications Reminders | | | | | | | | |
| Item Reminders + | | | | | | | | |
| Name | Email/Text To | # Of Days | Time Operator | Date | Item Status | Recurs | Interval (Da... | Email Temp |
| Closed | Supervisor | 0 | On | Date Completed | Work Completed | 1 | 1 | A Test |
| Bell Reminder | Supervisor, Vendor | 2 | After | Item Opened | New/Submitted | 2 | 2 | REMINDER |
| Item Reminder Test | Vendor | 1 | Before | Date Repair Item Start | Scheduled For Repair | 1 | 1 | REMINDER |
| Item Reminder Test 2 | Primary Owner | 1 | Before | Date Repair Item Start | Scheduled For Repair | 1 | 1 | Scheduled V |