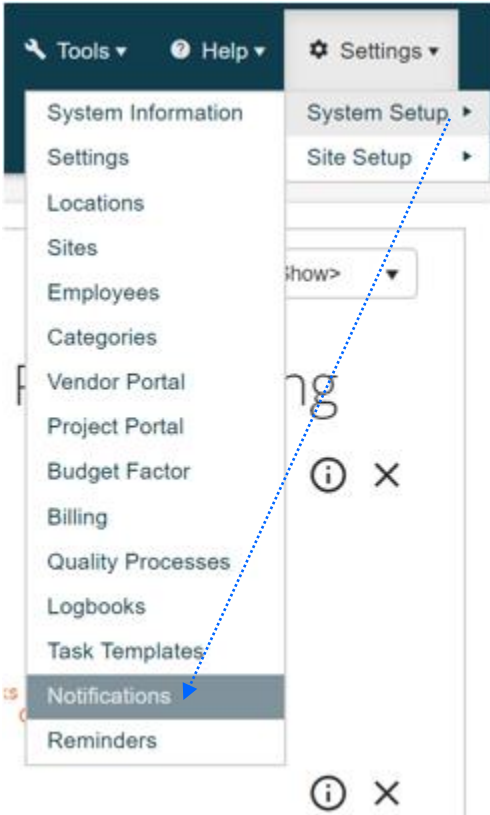


System Notifications

To setup System Notifications, in the blue toolbar select Settings → System Setup → Notifications.



System Notifications Page

- Send a notification to the assigned Vendor when the Vendor and/or the repair date changes on an item.
- Send a notification to the individual assigned to perform a walk/inspection.
- Send a notification to the individual assigned to a Task when it is overdue or due today.

Note: The notification email is not an editable email template.




System Information Settings Regions Sites Employees Categories Vendor Portal Project Portal Budget Factor			
Plans Options (Plans) Billing Quality Processes Logbooks Task Templates Notifications			
<input type="checkbox"/> Auto send notifications when the vendor or repair date changes on any item.			
<input type="checkbox"/> Auto send notifications on quality process assignment.			
Notify When...	Set Interval to	Notify Other	Record in Correspondence
Task is overdue?	None ▼	<input type="text"/>	<input type="checkbox"/>
Task is due today?	None ▼	<input type="text"/>	<input type="checkbox"/>

System Notifications


Auto send notifications when the vendor or repair date changes on any item.

✓ the box if you would like a notification to be sent to the assigned Vendor when the Vendor and/or the repair date changes on an item.

The following is a sample of the notification received when the vendor or the repair date changes on an item.

 Reply  Reply All  Forward

Mon 2/6/2017 12:07 AM

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

Item 1010-001 on Job TS16-7007 has been rescheduled

To: Dawn Bryant

Item 1010-001 on Job TS16-7007 has been rescheduled.

Previous Dates
Start: 2/6/2017 1:00 PM
End: 2/6/2017 4:00 PM

New Dates
Start: 2/7/2017 9:00 AM
End: 2/7/2017 12:00 PM

Auto send notifications on quality process assignment.

✓ the box if you would like a notification to be sent to the individual assigned to perform the walk/inspection.

The following is a sample of the notification received when a quality process has been assigned.

Dear Deb LaBrosse,

You have a new inspection on 103 at 1234 4321, Bldg 12, Unit 12, San Marcos, TX 78890

Inspection number 111171 - 3 Point Inspection

Priority: None

Ready Date:

Schedule Start Date: 10/30/2017

Opened:

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System Notifications

Task Notifications can be sent when a Task is Overdue or Due Today.

IMPORTANT: The notification emails come from the individual that last clicked save with the Notifications page.

Set the Interval – from the drop-down chose how often you would like the notification to be sent.

Notify When...	Set Interval to	Notify Other	Record in Correspondence
Task is overdue?	None ▼	<input type="text"/>	<input type="checkbox"/>
Task is due today?	<div style="border: 1px solid black; padding: 2px;"> None 1 hour 2 hours 3 hours 4 hours 6 hours 8 hours 12 hours 24 hours 2 days 3 days 1 week </div>	<input type="text"/>	<input type="checkbox"/>

Check if you want the notification recorded in Correspondence.

Notify When...	Set Interval to	Notify Other	Record in Correspondence
Task is overdue?	2 hours ▼	<input type="text"/>	<input type="checkbox"/>
Task is due today?	12 hours ▼	<input type="text"/>	<input type="checkbox"/>

If you would like someone other than than the person assigned to the task to receive the notification add the Email address in the Notify Other field comma separated if there is more than one.

Note: When an email address is applied within the other field that individual will receive all tasks notifications for all users.

Sample Email Notification:

From: deb@servicesoftwareinc.com [mailto:deb@servicesoftwareinc.com]
Sent: Tuesday, October 17, 2017 7:10 AM
To: Deb LaBrosse
Subject: Tasks Due Today

The following tasks are due today:
10/17/2017: Follow up
10/17/2017: Pre-Close Walk Through
10/17/2017: Year-End Phone Call

Thank you.