

Job Tracker Professional

Creating an Email Template



Job Tracker Pro [Setup]

Security / Users | Import | Custom Logo | SMS | Program Features | Sage Line 50 | Scanning

Networking | Counters & Data | Documents | File Locations | Maintenance | **Email Setup** | - Unused -

General Email Settings:

Email Reply Address: [] | **Receipt Required** | **Email Templates** []

SMTP Server: mail.sbssystems.co.uk | **Host requires SSL**

Default Email Subject: Job Completed | **Use CDO email method.**

SSL Port: 25 | **Send emails as plain text.**

SMTP Port: 25 | **Use Email Service**

SMTP Authentication:

Authentication Required | **Options:**

User Name: sam@sbssystems.co.uk | Do not use Email Sent Date

Password: [] | Disable Completed Emails

Allow only 1 completed email

Email Body:

If the email address comes from a non standard field, just enter the field code in the box below.

Email Field: [] | Use Customer Email Address | Use Client Email Address | Use Client Assignee Email Address

Email Subject: []

Dear [CUSTNAME]

The recent work carried out at: [SITEADDRESS] was successfully completed on [COMPLETEDDATE]

The job reference is [JOBNO]

The job details are: [DETAILS]

The engineer's who worked on the job were: [TECHNAME]

The email address used by the completed email is as follows: 1st Customers, 2nd Clients, 3rd Clients Assigned Personell. e.g. If a customer email address exists it will use that, failing that it will try the Client's email address and finally it will work through the list of assigned Client Personell. You can override this by ticking the appropriate box above. Where multiple Client Assigned personelle exist the 1st in the list will be used.

OK | Cancel | Apply

From the home screen of Job Tracker
Click on 'Control Panel'

Click on the 'Email Setup' tab.

Click on the 'Email Templates' button

Click on 'Create New Email Template'
in the bottom left of the screen.

Within the 'Template Name' field enter
something relevant for what you are
designing the email for.

Within the 'Subject' field, enter the subject
of the email as you would like it to appear
to the recipient.

Within the 'Body' field, type the email
as you would like it to appear to the
the recipient.
You can use HTML code to add formatting
such as bold or colours.

Job Tracker Pro - Email Templates

Email Templates

Template Name: [] | Load Email Template []

Subject: []

Body: ABC []

Create New Email Template | Delete | Exit



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Within the Body and Subject field, you can place in field codes that will automatically insert the relevant information from within Job Tracker into the email. For more information on which field codes to use visit:

http://www.job-tracker.co.uk/creating_templates_fieldcodes.php

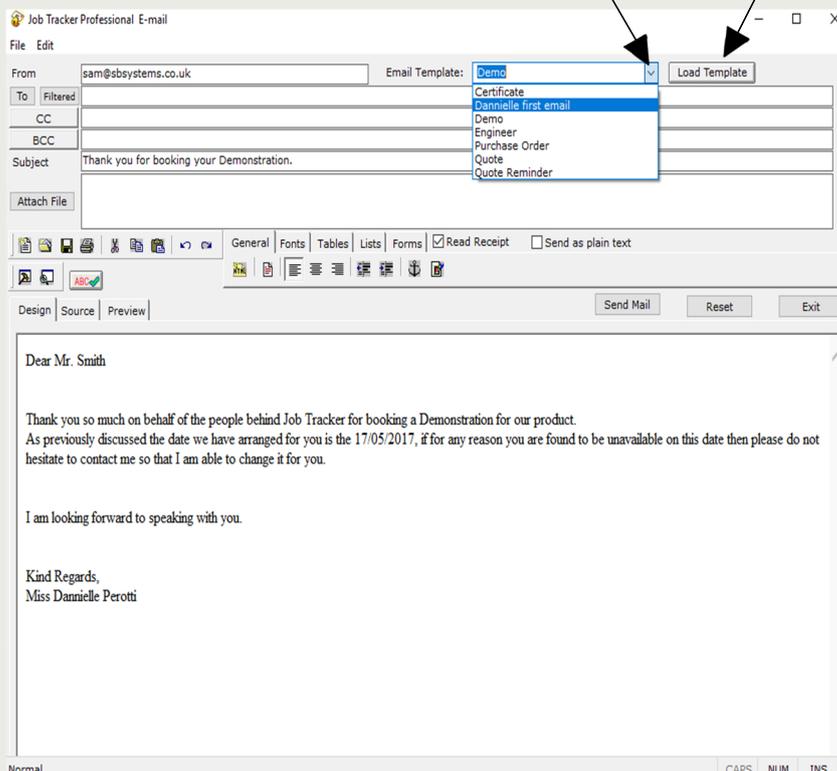
Click on 'Save email Template'.

Click 'Exit'.

To check that your Email Template is set up correctly, go back into Job Tracker and click on 'Contacts'. In the middle of the screen you will see an 'Email' field, click the 'Send Email' Button to the right of it.

In the 'Email Template' field in the top right, click the drop-down arrow and select which Template you would like to use.

Click on 'Load Template' in the top right of the screen.



This will present your Email template in the exact way a customer would receive it. In order to make sure that you don't accidentally send out the email when checking it then click the 'X' icon in the top right once it has loaded to Exit out of it.

