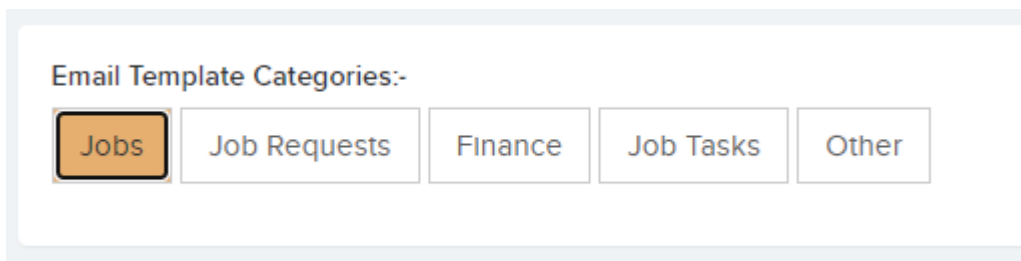


# Email Notifications

Alerts and notifications can be set up for users and contractors for a multitude of circumstances. These notification settings can be tailored by user, or can be set up by User Type; from which multiple users can inherit.

Email templates can be customised in the *Settings -> Email Templates* area: (Under 5 different tabs)



The *Email & Notification Settings* tab of the *User Details* page is where you can configure email notification settings by individual user:

- **Receive Email When Job Assigned To This User or This User's Team** – When a job is assigned to this user then they will receive an email.
- **Receive When Job Is Completed and Was Created by This User** – When a job is completed, if the user created the job, they will be sent an email.
- **Receive Email When Job Is Approved** – When a job is approved (and so ready for completion), then they will be sent an email.
- **Receive When Job Request Created by Another User** – When a job request is created by another user, this user will receive an email. They will also receive a notification.
- **Receive Email With Report of Overdue Pending Job**

**Requests** – You can receive emails on a regular basis for pending job requests that are overdue.

- **Receive Email When Job Request is Approved / Declined and Was created by This User** – If this user created a request, then they will receive an email when this request is approved or declined.
- **Receive Email When Planned Job is Overdue and is Assigned User for the job** – Users assigned to planned jobs will receive an email and notification for overdue planned jobs for a period of days.
- **Receive Email When Resource Leaves Task** – When a job task (usually from an instructed job) is completed by the resource / contractor, then this user will receive an email if they have access to the job's site.
- **Receive Email When Resource Leaves Task – to Assigned User or Team Users Only** – When a job task (usually from an instructed job) is completed by the resource / contractor, then this user will receive an email if they are the assigned user.
- **Receive Email When User Rejects Work Done on the Job Request Details Page** – If a user rejects the work done on the job request details page, then this user will receive an email.
- **Receive Contractor Invoice When Invoice Sent and Accrual Reports When Accrual Created** – When a contractor invoice is sent to the contractor (only enabled for certain clients – please contact [support@trackplanfm.com](mailto:support@trackplanfm.com) for guidance) the user can also receive a copy of the invoice.
- **Receive Reminder When Resource Qualification Expires** – Qualifications and qualification expiry dates can be set for each resource / contractor. If the date expires then this user can be sent an email, and a notification will also be raised.
- **Receive Email When Invoice Declined By Contractor** – When a contractor declines / rejects a contractor invoice sent to then (only enabled for certain clients –

please contact [support@trackplanfm.com](mailto:support@trackplanfm.com) for guidance) the user can be sent an email.

- **Receive Budget / Contract Alert Notifications** – Contracts / budgets can be set in the *Finance* area. Alert emails and notifications are created if a contract expires or the contract value is close to being exceeded. Choose here if this user will receive these emails and notifications.
- **Receive Notification When Site Form Date Expires or Imminent** – In *Sites* -> *Site Custom Fields*, date fields, such as lease dates, can be set up and notifications can be sent when this date is expired or close to expiry.
- **Receive Notification When Resource Adds Note or Document to a Job Task, and this User is the Assigned User**
- **Receive Email When Time Sheet is Submitted by Resource**
- **Receive Email on Forms Submitted With Fails** – If set to yes, then user will receive an email when a form is submitted with a fail.
- **Receive Email and Notification on Key Job and Task Events** – When a key job / task is created, an email and notification will be sent to users associated with the site to which the job / task is created.
- **Receive Email When Stock Below Reorder Level** – When stock levels are updated and the level falls below the reorder level, an email is sent to the user.

The *Email & Notification Settings* page also has the *Job Report Settings* tab which allows you to set the following features for the User reports. This report will send out an email with a spreadsheet of open jobs and overdue work:



- **Enable Scheduled Job Reports** – Enable this if you would like to schedule a job report to this user containing a list of open and overdue jobs. This is sent at an

interval of your choosing.

- **Report Restricted to Assigned Users Only** – This only sends jobs for sites the user has access to.
- **Last Time Sent** – This shows the last date and time a report was sent.
- **Next Report Send Date** – This shows the next date and time a report is due to be sent out.
- **Report Frequency** – This specifies how often the user will receive a report.

Notifications can also be configured by User Type. User Types are categories that allow you to group multiple users together. You can create your own User Types to represent different types of users, or departments. For example requestors, admin team, finance etc. These categories can be created and managed in the *Settings -> User Types* area.

In the *User Types* list, select *Manage* which will bring you to the *User Type Details* page. Similarly to the *User Details* page, the *User Type Details* page has an *Email & Notification Settings* tab that allows you to configure email notifications for each type.