

Service_Request_Send_Portal_Link_On_Customer_Email

This rule is scheduled to execute **30 days before the Permit Expiry Date at 09:20 AM**.

It will **run once** for each Service Request.

Action:

An **email notification** is sent to the **customer's email address** using a predefined email template, reminding them about the upcoming permit expiry

Screenshot of Email Notification:

The screenshot shows the 'Email Notification' configuration window for a 'Service Request'. The window has a title bar 'Email Notification - Service Request'. Inside, there are several fields and options:

- Name:** A text field containing 'Service Request Send Portal Link To Customer'.
- To:** A dropdown menu showing 'Owner' with a user icon to its right.
- ☐ Send this notification as a Single Mass Email with all recipients displayed
- Email Template:** A section with a 'Select Template' button and a link 'Admin Permit Expiry Notifica...'. The link is highlighted in blue.
- ☐ Send this email notification at Best Time to Email. ⓘ
- At the bottom, there are two buttons: 'Cancel' and 'Save and Associate'.

Email Template Screenshot :

Admin Permit Expiry Notification

Public Email Templates

Admin Permit Expiry Notification



Desktop



Mobile

Hello \${Service Request.Service Request Name},

Please look on that permit has been expired after 10 days.

This is our portal link. Click on the link below to access it anytime:

<https://ivaenvironmental.zcrmportals.com/portal/VAEnvironmental/crm/login.sas>

Regards

Contact Information