Email Options

Report generated at 18-Apr-2012

No	Name	Event when email will be sent automatically	Email Address	Email Address/Description	Content of the Email
1	Document upload from super records	Document uploaded by super records ADMIN TO CLIENT	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au>, <dynamic client email address>	Subject - super records has uploaded new document. Content - super records has uploaded {File Name} for you.
2	Client type Changed to Discontinued	Client type Changed to Discontinued	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au>, <jigneshk@super records.com.au>	Subject - {Client Name} has been discontinued by {User}. Content - {client name} has been discontinued from {date} and the reason for this is {reason}
3	Client Active	Client is activated for super records login		<dynamic client email address>	Subject - super records login details. Content - Your account has been acitvated for super records website. Login Details Name : {company name} Email / UserID : {email} Password : {password}

4	Create a new ticket	Raising a new ticket	info@superrecords.com.au,sanjay@befree.com.au	<Team in Charge mail address>,<Australia Manager mail address>,<Manager In Charge mail address>,<jigneshk@superrecords.com.au> and <info@superrecords.com.au>	Subject - New Ticket raised by {User} Content Ticket Type : {type} Client's Name : {clientname} Australia Manager : {ausmanager} Manager In Charge : {manager} Team In Charge : {teamincharge} Staff In Charge : {staffincharge} Priority : {priority} Issue Details : {issue_details} New Issue has been raised for {clientname} . Priority is {priority} . Due Date to Complete {duedate} Please login to super records app to resolve the issue promptly. Thank You Team @ super records Ticket issued by {issuer}
5	Document upload from Client	Document uploaded by CLIENT TO super records	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au, manager@superrecords.com.au,admin@superrecords.com.au>, <dynamic Team in Charge email address>, <dynamic India Manager email address>	Subject - {Client Name} uploaded document to super records. Content {client name} has uploaded {file name} for you.
6	New Client Assigned - Please send welcome email	when client changed LEAD to CONTRACT SIGNED, mail goes to Australian Manager		<dynamic australian manager email address>	Subject - E1 - New Client Assigned - Please send welcome email. Content Signed contract received for Client's name: {client name} Email: {email} State: {state} Service Required: {service required} Action for Manager 1 - Send Welcome Email - MUST DO NOW

| 7 | Signed Contract Received | when client changed LEAD to CONTRACT SIGNED, mail goes to Sales Person | info@superrecords.com.au,sanjay@befree.com.au | <info@superrecords.com.au>, <dynamic sales person email address> | Subject - E1 - Signed Contract Received.

Content
Signed contract received for
Client's name: {client name}
Email: {email}
State: {state}
Service Required: {service required}
Action for Sales Person
1 - Update Contact Details in super records App - MUST DO NOW.
2 - Submit Quote Sheet - MUST DO NOW
3 - Submit Sales Notes - MUST DO NOW OR WITHIN 24 HOURS |
| 8 | Quote Sheet Submitted by Sales | Quote Sheet Submitted by Sales | info@superrecords.com.au | <info@superrecords.com.au>, <billing@super records.com.au> and <dynamic sales person email address> | Subject - E2-Quote Sheet Submitted by {User} for {client name}.

Content
Quote Sheet is submitted by {dynamic user} and it ready to review for
Client's name: {client name}
Action Required for Billing
1 - Send Set Up Cost/Advance Fees Invoice, if applicable - Must send today
2 - Create Time & Billing Code for Time Sheet |

| 9 | Sales Notes | Sales Notes Submitted by Sales person | info@superrecords.com.au,sanjay@befree.com.au | <dilip.p@befreeit.com.au>,<dynamic Australian manager email address>. | Subject - E3 - Sales Notes submitted by {User} for {client name}.

Content
Sales Notes for {client name} is submitted by {dynamic user}. It is ready to review.
Action Requires for Manager
1 - Change the status from Contract signed to Client - Action within the system - Do Now.
2 - Assign job to India Manager - Action within the system - Do now.
3 - Brief meeting with sales person and discuss about permanent information sheet submitted by Sales. |
| 10 | Sales notes with tax services | Sales Notes submited along with tax services ticked | info@superrecords.com.au,sanjay@befree.com.au | Sales Notes/Tasks section - when we select "Yes" to super records doing tax returns, and when sales people submits the sales notes it goes to <mukund@super records.com.au>, <rajesh.k@befreeit.com.au>, vaishali@super records.com.au AND <dynamic Australian manager email address>. | Subject - E3 - Sales Notes submitted by {User} for {client name}.

Content
Sales Notes for {client name} is submitted by {dynamic user}. It is ready to review.
Action Requires for Manager
1 - Change the status from Contract signed to Client - Action within the system - Do Now.
2 - Assign job to India Manager - Action within the system - Do now.
3 - Brief meeting with sales person and discuss about permanent information sheet submitted by Sales. |

11	Assign new client to India Manager and Submit Permanant Info	1) when client type changed to "Client". 2) when India Manager changed to another Staff.		<dynamic india manager email address>	Subject - E4 - Assign new client to India Manager and Permanant Info Submitted by {User} for {client name}. Content New Client - {client name} has been assigned to you. Permanent Information Sheet has been completed by {dynamic user} & is now ready to review for you. Action Require for Indian Manager 1 - Assign Job to Team In Charge 2 - Must do Review Meeting Within 48 hours
12	Hosting	Hosting Sheet submitted	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au>	Subject - E5 - Hosting Submitted by {User} for {client name}. Content Hosting is submitted by {dynamic user} and it ready to review for Client's name: {client name} Action Require 1 – Create email account if applicable on all servers 2 - Please send Hosting Sheet to IT to create user account
13	New client ready to start/assigned to Team Incharge	New client ready to start - assigned by India manager to team leader		<dynamic Selected Team In Charge email address>, <dynamic India Manager email address>	Subject - E6 - New client ready to start/assigned to Team Incharge. Content Client {client name} has been assigned to you please action the following. 1 – Review of permanent information & other information to get job started. 2 – Assigned this client to one of your team member 3 – Create tasks in super records app.

14	Tax & Accounting Notes being submitted by Tax Manager Sydney	Tax Notes submitted by tax manager Sydney	info@superrecords.com.au,sanjay@befree.com.au	rajesh.k@befreeit.com.au AND mukund@superrecords.com.au	Subject - E7 - Tax & Accounting Notes being submitted by {User} for {client name}. Content Tax & Accounting Notes being submitted by {sales person}. Client : {client name} Action 1 – Kindly do a brief meeting with sales people.
15	Notification	Notification send		\<dynamic selected email address\>	\<b\>Subject\</b\> - {client name} has been updated by {User}.\</br\> \<b\>Content\</b\> {Notes Content}.
16	Forget Password	password forget request for super records WEBSITE users		\<dynamic user email address\>	\<b\>Subject\</b\> - Recovery password.\<br/\> \<b\>Content\</b\> Your username is : {email} Your password is : {password}
17	Tell A Friend	Tell A Friend - On-line Form		\<dynamic friend email address\>	\<b\>Subject\</b\> - Invite friend.\<br/\> \<b\>Content\</b\> I have found this website http://www.superrecords.com.au/ and thought you might be interested in using their services. If you need more information, feel free to contact them on info@superrecords.com.au
18	Thank You for Online Submission Email	when user Submitted the online form, Thank you mail goes to User mail address from super records		\<dynamic client email address\>	\<b\>Subject\</b\> - Thanks for your Interest.\</br\> \<b\>Content\</b\> Thank you for your online enquiry to super records. One of our qualified consultants will contact you within 24 hours to discuss how we can help you.

19	Ticket Status Completed	When ticket has been closed	info@superrecords.com.au,sanjay@befree.com.au	<issuer of ticket>, <Team In Charge>, <issue closed the user>, <Australia Manager>, <jigneshk@super records.com.au> and <info@superrecords.com.au>	Subject - Ticket Status Completed by {User}. Content Issue Details : {issue details} Resolution : {resolution} Name of Client : {client name} Due date set : {due date} Team In Charge : {teamin charge} This issue is closed now as it is set as completed by {issuer name}
20	Worksheet Status updated	When Worksheet Status updated		<dynamic TeamInCharge mail address>	Subject - Worksheet Status updated by {User}. Content Client : {client name} Worksheet Status (For team leader review) updated by {dynamic user}
21		Online Enquiry Form Submission Email - ACT	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au,nick.g@super records.com.au,vaishali@super records.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}

22		Online Enquiry Form Submission Email - NSW - SMS	info@superrecords.com.au,sanjay@befree.com.au	<0411778022@sms.smsglobal.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}
23		Online Enquiry Form Submission Email - NSW	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au,nick.g@super records.com.au,vaishali@super records.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}
24		Online Enquiry Form Submission Email - NT	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au,nick.g@super records.com.au,vaishali@super records.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}

25		Online Enquiry Form Submission Email - QLD	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au,nick.g@super records.com.au,vaishali@super records.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}
26		Online Enquiry Form Submission Email - SA	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au,nick.g@super records.com.au,vaishali@super records.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}
27		Online Enquiry Form Submission Email - VIC	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au,nick.g@super records.com.au,vaishali@super records.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}

28		Online Enquiry Form Submission Email - WA	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au,nick.g@super records.com.au,vaishali@super records.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}
29		Online Enquiry Form Submission Email - ACT - SMS	info@superrecords.com.au,sanjay@befree.com.au	<0411778022@sms.smsglobal.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}
30	test	Online Enquiry Form Submission Email - TAS	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au,nick.g@super records.com.au,vaishali@super records.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}

31		Online Enquiry Form Submission Email - NT - SMS	info@superrecords.com.au,sanjay@befree.com.au	<0411778022@sms.smsglobal.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}
32		Online Enquiry Form Submission Email - QLD - SMS	info@superrecords.com.au,sanjay@befree.com.au	<0411778022@sms.smsglobal.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}
33		Online Enquiry Form Submission Email - SA - SMS	info@superrecords.com.au,sanjay@befree.com.au	<0411778022@sms.smsglobal.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}

34		Online Enquiry Form Submission Email - VIC - SMS	info@superrecords.com.au,sanjay@befree.com.au	<0411778022@sms.smsglobal.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}
35		Online Enquiry Form Submission Email - WA - SMS	info@superrecords.com.au,sanjay@befree.com.au	<0411778022@sms.smsglobal.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}
36		Online Enquiry Form Submission Email - TAS - SMS	info@superrecords.com.au,sanjay@befree.com.au	<0411778022@sms.smsglobal.com.au>	Subject - Request Free Quote- super records. Content Con: {%contact name%} Com: {%company name%} P: {%phone number%} E: {%email%} {%contact address%} S: {%contact state%} SR: {%services required%}{%services other%} M: {%message%}

37	Ticket Type Changed to Issue	When ticket type changed to Issue	info@superrecords.com.au,sanjay@befree.com.au	<issuer of ticket>, <Team In Charge>, <issue closed the user>, <Australia Manager> and <info@superrecords.com.au>	Subject - Ticket Type changed to Issues as by {User}. Content Ticket Type : {type} Issue Details : {issue details} Name of Client : {client name} Due date set : {due date} Team In Charge : {teamin charge} This Ticket type changed to Issue by {issuer name}
38	New Cross Sales Opportunity	New Cross Sales Opportunity	info@superrecords.com.au,sanjay@befree.com.au	<info@superrecords.com.au>, <jigneshk@befree.com.au>, <generated lead> and <cross sales staff>	Cross Sales Opportunity generated by (name of employee who generated lead) Date received : (date_received) Name of client : (name_of_client) Service required : (service_required) Method of contact : (method_of_contact) Action Require d - Name of Cross Sales Staff – Please organize a quote & send to client SAME DAY

| 39 | New Cross Sales Opportunity Status Update | New Cross Sales Opportunity Status Update | info@superrecords.com.au,sanjay@befree.com.au | <info@superrecords.com.au>, <jigneshk@befree.com.au> and <cross sales staff> | Cross Sales Opportunity is Updated by (Name of Cross Sales Staff, variable)
Date Updated - (updated-date)
Name of Client - (client-name)
Cross Sales Opportunity Status - (status)
Service required - (service-required)
Action Required -
Name of Cross Sales Staff - please take following action

If successful
1. Send client's acknolwement accepting & quote
a. billing for their record & billing purposes
b. Team Leader so they can start work on it
c. Tax Team if it is for tax returns
d. Any other relevant staff.

If not successful
1. No action is required. |