

REUTHER

Automation Tickets

#67217

I played around with the custom fields, and it would be the best way for us when we could select this fields within the account data set as triggers for automations:

The screenshot shows a CRM account form with the following sections and fields:

- Company Info:** Company Name (Deutsche Bau- und Siedlungsgesellschaft MBH), Account Type, Contract, Phone, Email, Source (FB), On hold, Account Ref (DEU10001), Organisation Name (Reuther Fenstergestaltung E.K.), Website, Payment Terms.
- Address info:** Address1, Address2, Town / City, State / County, Zipcode / Postcode.
- Automatisierungen:** Rechnungen (Automatisch senden, Manuell senden), Sendungsnummer per Mail senden (Ja, Nein), Lieferscheine (Per Mail senden, Ware belegen, Digital und Papier), Mail bei Produktionsverschiebung (nein, ab 1 Tag, ab 3 Tagen).
- Report email settings:** Email (mail@reuther.de), Send report (Select).

The "Automatisierungen" section is circled in red in the original image.

Furthermore, we would need a customized dashboards based of the values of this fields within the job data for static reasons (Reklamation is Rework in German):

The screenshot shows a 'Reklamation' form with the following fields:

- Reklamation: Ja Nein
- Reklamationsverursacher: Niemand
- Gemeldet von: gemeldet von
- Schadenssumme geschätzt: Schadenssumme geschätzt
- Reklamationsgrund: Keiner
- Beschreibung: Multiple Line
- Gemeldet am: Date & Time

For the information written inside the field "Beschreibung" we would need a detailed list at the end of every month to have deeper look in the specific jobs and reasons for Reworks. Is there a way to achieve it without having to go into every single rework job and extract it manually in an excel sheet?

#67216

Appointments

1. Whenever a appointment in the calender is set and marked as confirmed, send a reminder via mail / sms / Whatsapp to the customer based on the selection in this checkfield:

The screenshot shows a software interface with a dropdown menu open. The dropdown menu is titled 'Terminbestätigung' and contains the following options: 'Keine', 'WhatsApp', 'SMS', 'E-Mail', 'Keine', 'E-Mail + WhatsApp', and 'E-Mail + SMS'. The 'Keine' option is currently selected. The background interface shows sections for 'Abrechnung' (with 'Sammelrechnung bevorzugt') and 'Report email settings' (with 'Email 1').

Question: How do we make sure that the reminder is send to the contact selected in the job itself?

#67215

Payment reminder

The screenshot shows a software interface for 'Automatisierungen' (Automations). It has several sections with radio buttons and dropdown menus. The 'Rechnungen' section has 'Automatisch senden' and 'Manuell senden' (selected). The 'Lieferscheine' section has 'Per Mail senden' (selected), 'Ware belegen', and 'Digital und Papier'. The 'Zahlungsbearbeitung' section has 'Mail bei Produktionsverschiebung' with 'nein' (selected), 'ab 1 Tag', and 'ab 3 Tagen'. The 'Terminbestätigung' section has a dropdown menu with 'Keine' selected. A yellow highlight is on the 'Manuell automatisch senden' option.

1. When this field is selected, send a payment reminder to the customer as soon as a payment is overdue with the Template "Zahlungserinnerung"
2. If possible and one payment reminder has been already sent, send another payment reminder after 7 days to the customer with Template "Zahlungserinnerung 2"
1. If possible and two payment reminder have been already sent, send another payment reminder after 7 days to the customer with Template "Zahlungserinnerung 3"

-> if not possible, please try to create that feature ASAP because in Germany we are obligated by law to send payment reminders before we need to inform another company and not sending payment reminders is actually a crime in some special cases

#67213

Confirmation payment

Automatisierungen	
Rechnungen	<input type="radio"/> Automatisch senden <input checked="" type="radio"/> Manuell senden
Sendungsnummer per Mail senden	<input type="radio"/> Ja <input checked="" type="radio"/> Nein
Zahlungsbenachrichtigung	<input type="radio"/> Ja <input checked="" type="radio"/> Nein
Terminbestätigung	<input type="text" value="Keine"/>

If this box is checked, send a mail to the accounting person from our customer with Template "Zahlung erhalten"

Hi Michael,

I actually dont know yet how to set up that specific reports Are always getting send to a certain Mail Adress in Blindmatrix or to a specific contact but as far as i understood it you can somehow definie which Report is getting send to which mailadress

#67211

Workroom

1. Whenever something on each workstation something is scanned/marked as completed, automatically print out a label for this item line
2. Whenever all items of a job are marked as ready, automatically set the job status to "Bereit für Kommissionierung"
3. Whenever a job status is set to "Vollständig versendet" send a mail with the template "Ware vollständig versendet" to the customer / when status is "Teilweise versendet", send a mail with the template "Ware teilweise versendet" to the customer --> both with the delievery note as PDF but only if one of those two yellow checkboxes is filled out:

Automatisierungen

Rechnungen Automatisch senden Manuell senden

Sendungsnummer per Mail senden Ja Nein

Lieferschein Per Mail senden Ware belegen Digital und Papier

Mail bei Produktionsverschiebung nein ab 1 Tag ab 3 Tagen

#67210

Invoices

1. When this is chosen and the order status is "Vollständig versendet", automatically create a full invoice for the job and send it to the customer:

Automatisierungen

Rechnungen Automatisch senden Manuell senden

Sendungsnummer per Mail senden Ja Nein

Lieferschein Per Mail senden Ware belegen Digital und Papier

Mail bei Produktionsverschiebung nein ab 1 Tag ab 3 Tagen

Edit Layout For Job

Job default: [Settings]

PO Delivery Address [Settings]

Name	Single Line	Address_1	Single Line
Address_2	Single Line	Address_3	Single Line
Postcode	Single Line	Phone_No	Phone

Versandart [Dropdown] [Settings]

Markierungen Pakete	Multi Line	Sendungsnummer UPS	Single Line
Hinweise Anlieferung	Single Line	Telefonisches Avis	Single Line
Abmessungen Packstücke	Single Line	Sendungsnummer Spedition	Single Line
Verpackungsart	[Radio]	Gewichte Packstücke	Single Line
		Montagetermin vereinbart	[Radio]

Reklamation [Settings]

Reklamation	[Radio]	Reklamationsgrund	Keiner
Reklamationsverursacher	Niemand	Beschreibung	Multi Line
Gemeldet von	Single Line	Gemeldet am	Date & Time
Schadenssumme geschätzt	Number		

Zusätzliche Informationen [Settings]

Auftragsart	Standard	Manuelle Abrechnung erzwin...	[Checkbox]
-------------	----------	-------------------------------	------------

Activate Win [Settings] Go to Settings to activate

2. When the order status is "Bereit zur Abholung", send full invoice with template "Rechnung + Info Ware bereit zur Abholung"
3. When the order status is "Montage vollständig", send full invoice with template "Rechnung + Montage" and add the customer signature on the delievery note if possible
4. When this field is chosen (=batch invoice) send as much invoices as possible to the customer in ONE mail and not every invoice for the customer separtly:

Abrechnung

Sammelrechnung bevorzugt Ja Nein

- **Everything Excluding all Jobs that have Versandart "Montage" and excluding all Jobs that have "Manuelle Abrechnung zwingen" selected**
- **Everything with 1 day of delay**