

Company Documents - Automatic Email Notifications

NOTE: The fields displayed on the screen may vary from the illustrations below based on an individual user's security rights or based on the specific configuration of the database. For any questions related to these fields, contact your system administrator. For additional definitions of fields which are not shown below, see [Online Help](#).

The Automatic Email Notifications functionality allows you to establish settings that cause automatic email notifications to be sent out informing people that a document is about to expire or has expired. These emails are sent out automatically on a schedule you define, without requiring manual intervention. For a given document, you can establish up to three notifications. For each notification, you select the time interval on which the notification is sent, the format of the email notification, and you enter the email addresses of the people to inform.

This functionality must be enabled for your database in order to be used. See your system administrator if the functionality is not turned on, or if the appropriate Intervals and/or Email Format(s) are not configured in your database.

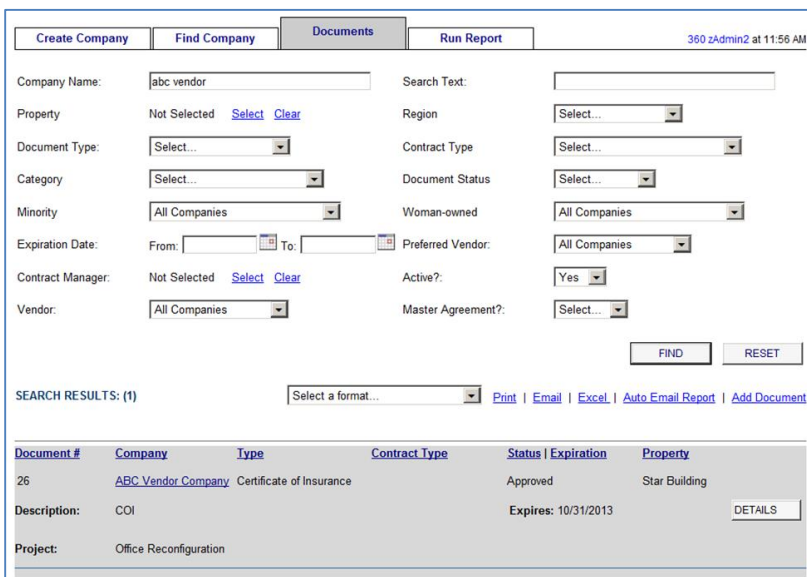
This document outlines the following topics:

- Adding Notification Records
- Editing Notification Records
- Removing Notification Records
- Reporting on Auto Email Configurations
- Checking on Auto Emails Sent

See related documents or [Online Help](#) for details related to Company Documents and to other functionality within the Company module.

ADDING NOTIFICATION RECORDS

1. Using the **Documents** tab within the **Company** module, enter any criteria as desired to search for Company Document records.
2. In the search results, click **DETAILS** to view the Company Document record.
3. Note that you can also access the Company Document records by searching for a Company record using the **Find Company** tab, and opening the record to display the COMPANY DETAILS screen. Then you would click **DETAILS** on the desired Company Document record.



The screenshot shows the 'Documents' tab in the Accruent system. It includes search filters for Company Name, Property, Document Type, Category, Minority, Expiration Date, Contract Manager, Vendor, Region, Contract Type, Document Status, Woman-owned, Preferred Vendor, Active?, and Master Agreement?. Below the filters are 'FIND' and 'RESET' buttons. The search results section shows one result for 'ABC Vendor Company' with a 'Certificate of Insurance' document. The document details include 'COI' description, 'Office Reconfiguration' project, 'Approved' status, and an expiration date of '10/31/2013'. A 'DETAILS' button is available for this record.

Document #	Company	Type	Contract Type	Status	Expiration	Property
26	ABC Vendor Company	Certificate of Insurance		Approved	10/31/2013	Star Building

Description: COI
Project: Office Reconfiguration

[Create Company](#)
[Find Company](#)
[Documents](#)
[Run Report](#)
360 zAdmin2 at 11:18 AM

VIEW DOCUMENT DETAILS

■ indicates a required field

COMPANY DOCUMENT DETAILS:

[Company Documents](#) |
 [Return To Project](#) |
 [Edit Document](#) |
 [Online Document](#)

Company:	ABC Vendor Company	Property:	Star Building
Document #:	26	Master Agreement?:	No
Document Type:	Certificate of Insurance	Contract Type:	
Description:	COI	Status Comments:	
Document Status:	Approved		
Contract Manager:			

TERMS:

Start Date:		Expiration Date:	10/31/2013
Cost Amount:	0	Terms:	
Approval Date:		Approved By:	

CONTACT INFORMATION:

Contact Person:	Email:
Phone:	Send Manual Email?: No
Mailing Address:	Alt Phone:
Send Date:	Send Comments:

AUTO EMAIL SETUP:

No Records Found

AUTO EMAIL SETUP:

Interval	Notify Contact	Email Format	Email Addresses	Remove
Select interval...	☐	Select format...		☐
Select interval...	☐	Select format...		☐
Select interval...	☐	Select format...		☐

AUTO EMAIL SETUP:

Interval	Notify Contact	Email Format	Email Addresses
30 Days Prior	No	COI - Vendor Expiration - 30 Day Notice	fred@abc.com
1 Day Prior	No	COI - Vendor Expiration	fred@abc.com,joe@abc.com

- If there are already notifications set up, they will appear in the **AUTO EMAIL SETUP** section.
- To add records, click **Edit Document** to go to edit mode.
- In the AUTO EMAIL SETUP section, for each notification, specify the following values:
 - Select the time **Interval** on which the notification should be sent. The time interval indicates the number of days before or after the expiration date the notification should be sent. For example, the "30 Days Prior" interval may send a notification 30 days before the document's expiration date. These intervals are set up by your system administrator.
 - Check **Notify Contact** if you want an email notification to additionally be sent to the Contact Person listed in the CONTACT INFORMATION section of the Company Document record. You must have a valid email address configured in that section for this feature to function.
 - Select the **Email Format** for the email that will be sent for this notification interval.
 - In the **Email Address** field, enter the email addresses of people (other than the Contact Person as outlined above) who should receive the notification. You can enter multiple email addresses separated by commas. If you do this, do not put spaces between the email addresses/commas.
 - Continue to add additional notification records as desired, up to three.
 - Click **UPDATE** at the bottom of the screen to add the notification records.

AUTO EMAIL SETUP:

Interval	Notify Contact	Email Format	Email Addresses	Remove
30 Days Prior	☐	COI - Vendor Expiration - 30 Day	fred@abc.com	☐
1 Day Prior	☐	COI - Vendor Expiration	fred@abc.com,joe@abc.com	☐
Select interval...	☐	Select format...		☐

EDITING NOTIFICATION RECORDS

13. Open a Company Document record as outlined above.
14. Click **Edit Document** from the COMPANY DOCUMENT DETAILS screen.
15. Make any changes within the AUTO EMAIL SETUP section.
16. For definitions of fields, see the first section of this document, ADDING NOTIFICATION RECORDS.
17. Click **UPDATE** at the bottom of the screen.

REMOVING NOTIFICATION RECORDS

18. You must manually remove the email notifications if you retire a Company or a Company Document. Changing the status of a Company or a Company Document to inactive does not stop the auto email notifications from being sent.
19. Open a Company Document record as outlined above.
20. Click **Edit Document** from the COMPANY DOCUMENT DETAILS screen.
21. In the AUTO EMAIL SETUP section, click the **Remove** checkbox(es).
22. Click **UPDATE** at the bottom of the screen.

Create CompanyFind CompanyDocumentsRun Report

360 zAdmin2 at 11:56 AM

Company Name:abc vendorSearch Text:

PropertyNot Selected Select ClearRegionSelect...

Document Type:Select...Contract TypeSelect...

CategorySelect...Document StatusSelect...

MinorityAll CompaniesWoman-ownedAll Companies

Expiration Date:From:To:Preferred Vendor:All Companies

Contract Manager:Not Selected Select ClearActive?:Yes

Vendor:All CompaniesMaster Agreement?:Select...

FINDRESET

SEARCH RESULTS: (1)Select a format...Print | Email | Excel | Auto Email Report | Add Document

Document #	Company	Type	Contract Type	Status Expiration	Property
26	ABC Vendor Company	Certificate of Insurance		Approved	Star Building
Description:		COI	Expires: 10/31/2013		DETAILS
Project:		Office Reconfiguration			

REPORTING ON AUTO EMAIL CONFIGURATIONS

- Using the **Documents** tab within the **Company** module, enter any criteria as desired to search for Company Document records.
- Above the search results, click the Auto Email Report link.
- This will provide you with an Excel report which will detail each of the Auto Email Configurations in place for each Company Document.
- In the example to the left, some columns have been hidden.
- Note that the **Calculated Email Date** displays the date an email would be or would have been sent based on the Interval relative to the Expiration Date.

EXCERPT from Auto Email Report (Note that some columns are hidden):

	A	C	D	E	F	G	H	I	L	M
	Company Name	Document #	Document Description	Document Type	Document Print Format Name	Interval Detail Description	Email Addresses	Subject	Expiration Date	Calculated Email Date
1	ABC Vendor Co	1245	COI	Certificate of Insurance	COI Notification Email - First and Second	30 Days Before	fred@abc.com;jm@abc.com	COI Expiration Notification	9/7/2013	8/8/2013
2	ABC Vendor Co	1245	COI	Certificate of Insurance	COI Notification Email - First and Second	Term (0 days)	fred@abc.com;jm@abc.com	COI Expiration Notification	9/7/2013	9/7/2013
3	ABC Vendor Co	1245	COI	Certificate of Insurance	COI Notification Email - FINAL	Post 30 days	fred@abc.com;jm@abc.com	COI Expiration Notification - FINAL	9/7/2013	10/7/2013

DOCUMENT HISTORY:

Type:	Update Date:	Comments:	Status:	Cost Amount:	Updated By:
Update	10/7/2010 6:19 PM	Expiration Date has been changed from 10/31/2010 to 10/31/2009.	Fully Executed	0.00	360 zAdmin2
Update	2/23/2011 10:15 AM	Document Print Format printed	Fully Executed	0.00	360 zAdmin2
Update	2/23/2011 10:31 AM	Email sent to joan.smith@asi.com	Fully Executed	0.00	360zAdmin2

CHECKING ON AUTO EMAILS SENT

28. When an email is sent from the system, this will be recorded in the **DOCUMENT HISTORY** section of the **COMPANY DOCUMENT DETAILS** screen for an individual Company Document.
29. Additionally, from this screen you can view the email sent using the **Outbound** link under **OTHER OPTIONS**.

