Completion Report Emails

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1 Completion Report Emails

CALIDUS ePOD can send completion report emails (i.e. POD, POC, service report) once the user completes the job. The system can send emails to job- or customer-specific email addresses or to central site email addresses.

1.1 Prerequisites

The *CALIDUS* ePOD server host must be configured with a link to the email server in use.

1.2 Configuration

To enable the functionality, you must configure the *Auto Email* flag and email addresses against the site or the job group. Optionally, you can also configure the job or customer email subject and body for the job group.

You can find the site *Auto Email* flag on the C-ePOD Admin *Administration* menu, under *Site*. The *Admin* tab allows you to configure the *Auto-Email* process.

The site email address must be configured to send emails to a central site email addresses. This can be found on the same *Site* maintenance page above. You can specify multiple email addresses here. 💡 **Note:** When you are configuring multiple emails, they must be separated with the email server's separation character, which is usually a comma or a semi-colon. This is dependent on the email server that *CALIDUS* ePOD is configured to use.

This *Auto Email* functionality is configured through a drop-down list to enable or disable automatic emailing of completion reports to the customers' email addresses, usually the transport or customer service email. The values are:

- *Disabled* - no emails are sent.
- *Enabled (Complete Only)* - only complete (not cancelled) jobs are emailed.
- *Both Enabled (Complete and Cancelled)* - Complete and cancelled jobs are emailed.
- *Enabled (Complete and non-amended)* - Fully complete (i.e. not amended) jobs are emailed.
- *Enabled (Complete and Amended Only)* - Only amended jobs are emailed.
- *Enabled (Cancelled Only)* - Only cancelled jobs are emailed.
- *Enabled (Not Clean)* - Cancelled and amended jobs are emailed.

💡 **Note:** If you also configure the Site for emails, they will be sent for all jobs regardless of the job group flag. To target specific job groups, you should ensure that the site configuration is set to *Disabled* and configure only the specific job groups.

You can find the job group *Auto Email* flag on the C-ePOD Admin *Administration* menu, under *Job Groups*. When you select a job group from the results table (using the **Select** action button), the *Admin* tab allows the *Auto-Email* configuration element to be configured.

This *Auto Email* functionality is configured through a drop-down list controlling automatic emailing of completion reports. The values are:

- *Disabled* - no emails will be sent to the customer.
- *Enabled (Complete Only)* - only successfully-completed (fully or amended) jobs will be emailed.
- *Both Enabled (Complete and Cancelled)* - Complete and Cancelled jobs will be emailed.
- *Enabled (Complete and non-amended)* - Only fully-complete jobs will be emailed (i.e. jobs that are amended will not be emailed).

To send emails to job-specific email addresses, the email address must be present on the job or the customer for that job.

You can configure the email addresses in 2 places:

You must link each job to a customer. If the job is to the customer address maintained here, you can maintain the email addresses against the customer, found on the ePOD Admin *Maintenance* menu, under *Customer*. When you select a

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customer (using the **Select** action button), you can enter the email addresses in the *Email* text box provided in the pop-up.

If the job is to an address that is not the same address as the customer, the system will have created a job address for the job. You can maintain the email addresses against the job, found on the ePOD Admin *Tasks* menu, under *Jobs*. When you select a job from the results table)using the **Select** action button), you can enter the email addresses in the *Email* text box provided in the pop-up.

In either case, you can specify multiple email addresses. 💡 **Note:** When you are configuring multiple emails, they must be separated with the email server's separation character, which is usually a comma or a semi-colon. This is dependent on the email server that *CALIDUS* ePOD is configured to use.

💡 **Note:** When the system receives jobs from external systems (for example, *CALIDUS* TMS), these will contain the email information when the jobs are interfaced into *CALIDUS* ePOD. In this case, you should maintain these in that external system, if it allows this.

By default, the system will send the completion report as an HTML email, with the report forming the body of the email. The email client the customer is using is responsible for the formatting of this email report. It is recommended that the report be sent as a PDF attachment instead, as the system can directly control the report layout.

You can configure this through the site. The site *PODs PDF* flag is found on the ePOD *Admin* Administration menu, under *Site*, on the *Admin* tab, labelled as *PODs PDF*.

You can configure the subject and body of the email sent to the customer (through the customer or job email address) on the job group. You can find the configuration items on C-ePOD Admin *Administration* menu, under *Job Groups*. When you select a job group from the results table (using the **Select** action button), you can set the *Email Subject* and *Email Body* on the *Admin* tab.

You can insert data from the job into the email subject and body, by identifying the data in square brackets. You can use any field from the job record, with some additions, as follows:

- [EPL_CUSTOMER_NAME] - the name of the customer linked to by the job.
- [EPL_END_ACTUAL_DATE] - converted to a standard date format.
- [EPL_JOB_TYPE] - translated to "Collection" or "Delivery".

Other key job fields are:

- [EPL_JOB_CODE] - the main transport or order reference.
- [EPL_CUST_REF] - the customer's order reference.
- [EPL_SO_REF] - the sales order reference.
- [EPL_EXT_REF] - any external reference.

Please contact your OBSL support team for further details of what may be added.

1.3 Operation

Once you have configured the system and provided email addresses for the site or jobs, the system will automatically email reports to these email addresses through the configured email server at the time when jobs are completed. The system will send reports for all types of jobs (i.e. collection, delivery, service) when the jobs are completed.

This is part of the existing export functionality - if you configure *CALIDUS* ePOD to send any data to any external system (for example, *CALIDUS* TMS, *CALIDUS* Portal TTM), emails will be sent with no further configuration required.

The system will an email to the appropriate email addresses as part of this process. This will either embed the web report as the body, or attach a PDF of the report, depending on your configuration.

If this email is sent to the site email address, the email will always have the subject and body as follows:

- Subject: "{Job Type}:{Job ID}:{Job Code}"
- Body (if PDF): "Please find attached your delivery documentation, Thank You"

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The subject and the body of the customer email will be created based on the configuration entered against the job group. If there is no subject or body configuration against the job group, the system will send the email with the subject and body defaulted as follows:

- Subject: "{Site Name}: {POC/POD} for Order: {Job ID} on on {End Time} {End Date}"
- Body (if PDF): "Please find attached your {collection/delivery} documentation, Thank You"

Note: If you configure it to do so, the system will send emails to both the site and customer email addresses. Once the system sends an email for a job, it marks the job as sent and will send it again.

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