

Email Notifications

Instructions

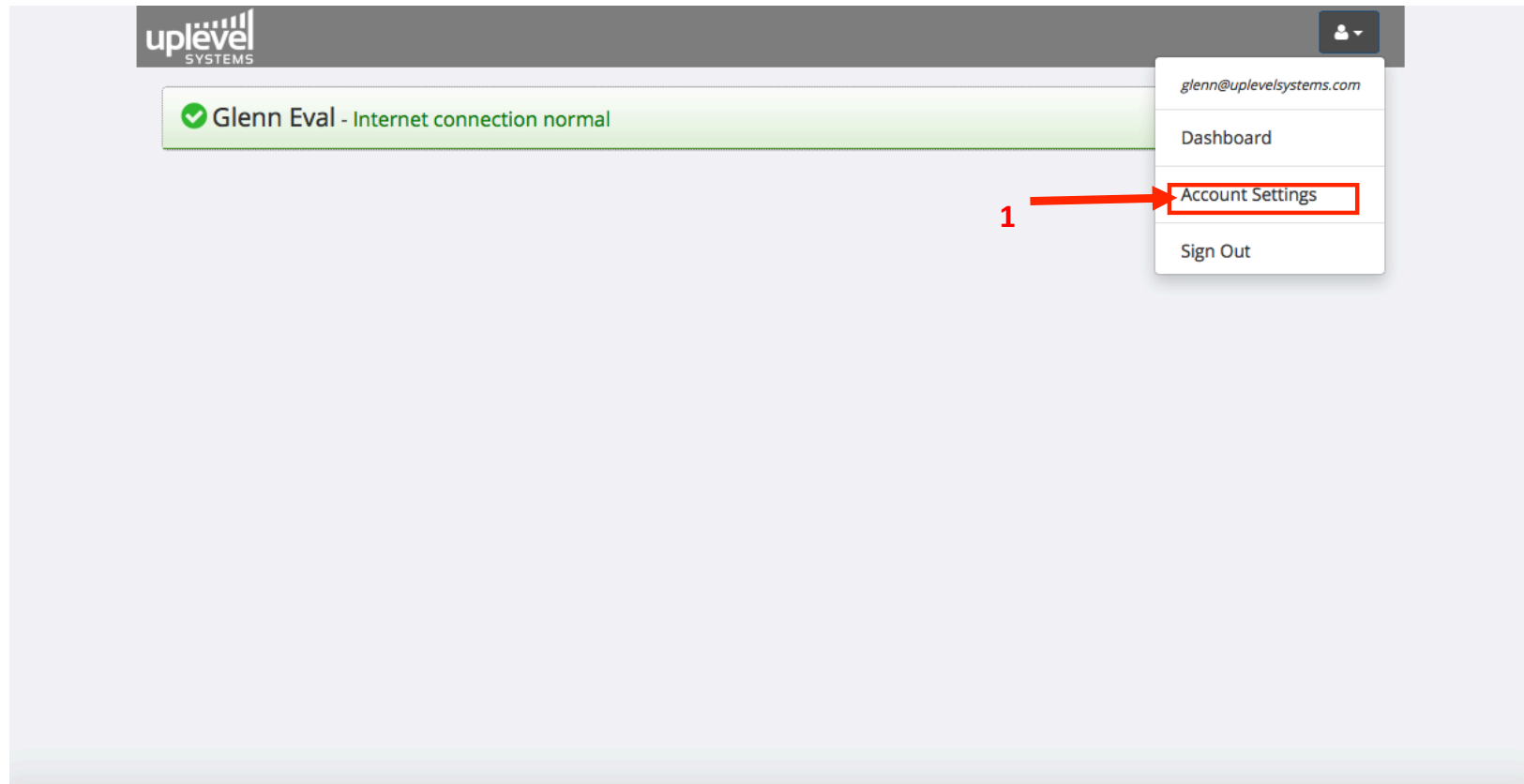


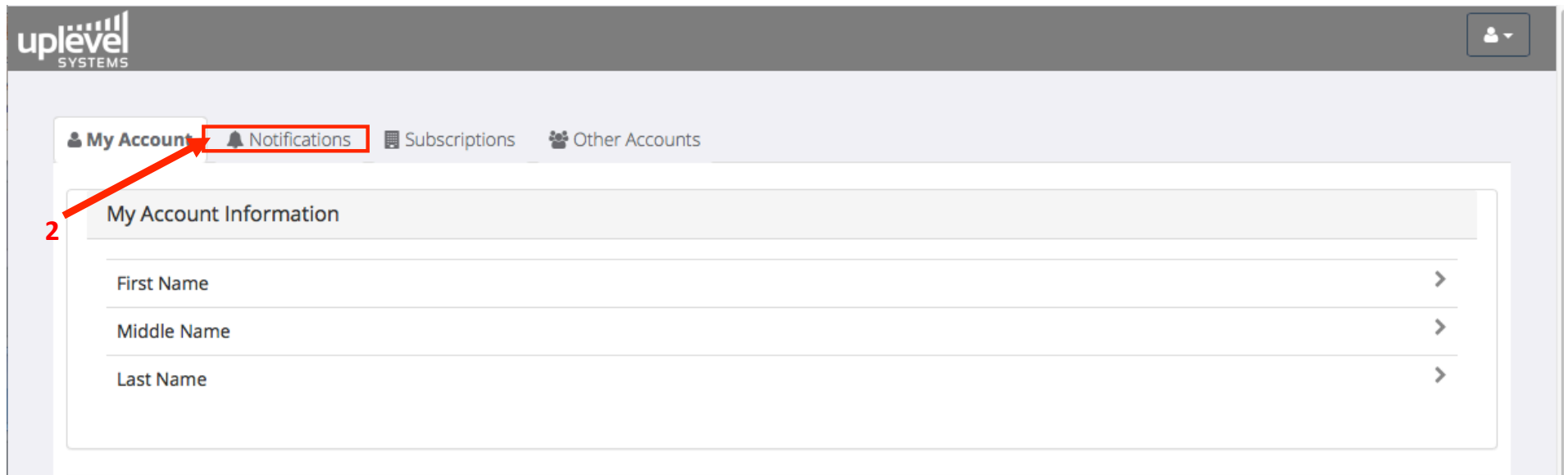
How to Figure Email Notifications



1. Configure the Uplevel Dashboard to enable email notifications
2. Configure your PSA to receive and route the notifications
 1. AutoTask
 2. Connectwise
 3. RepairShopr

*Other PSA's are supported however not explained in this Powerpoint. For more information about your PSA setup please contact support@uplevelsystems.com or your PSA support.





[My Account](#) **Notifications** [Subscriptions](#) [Other Accounts](#)

Send email when an issue is detected

3

On Failure Send Email to:

Email address(es), separated by comma

4

Send follow-up email when the system recovers from failure

On Warning Send Email to

5

Use same email list Clear

Email Subject Line:

Enter email subject

6

Email Body:

Enter email body

7

Enter any text in the subject line and body with parameters: {severity}, {customer}, {site}, and {description}

8

Save

Cancel

Email coming from: noreply@mailuplevel.com



Example Subject Lines

Email Subject Line:
{severity}, {customer}, {site}

Email Body:
{description}

Enter any text in the subject line and body with parameters: {severity}, {customer}, {site}, and {description}

Output:
Subject: Urgent, Cost Cuter, Homer
Body: Wifi Outage

Input:

Uplevel: {severity} issue detected at {customer} {site}
Uplevel- {customer} is experiencing an {severity} {description}
Alert: {severity} attention is needed at {customer}

Output:

Uplevel: Urgent issue detected at Cost Crusher Homer
Uplevel- Cost Crusher is experiencing an Urgent Wifi Outage
Alert: Urgent attention is needed at Cost Crusher

AutoTask

The screenshot displays the AutoTask configuration interface. At the top left is the uplevel SYSTEMS logo. The main header area contains a search bar, navigation icons (bar chart, plus, user, list, star, calendar), and the user name 'PAMELA** PIERCE | LOGOUT' with a link icon, chat icon, and help icon. A left sidebar menu lists: HOME, CRM, DIRECTORY, CONTRACTS, PROJECTS, SERVICE DESK, TIMESHEETS, REPORTS, OUTSOURCE, and ADMIN. The ADMIN menu item is highlighted with a red box and a red arrow labeled '2'. A dropdown menu is open from ADMIN, showing 'Admin Categories' (Features & Settings, Extensions & Integrations) and 'Commonly Used' (Getting Started, Resources (Users), Form Templates, Notification Templates, Workflow Rules, User-Defined Fields, System Settings, Client Portal: Manage Clients). The main content area shows configuration sections: 'Note Types' (Categories for organizing notes based on their purpose, location, and who can view them.), 'Knowledgebase' (Configure article categories and security for your company's knowledgebase.), 'Downloads' (Access data import templates and download the MSOutlook Extension.), and 'Site Usage' (A utility that shows the size of your Autotask database and your file attachments (in MB)). At the bottom, 'Form Templates' (Templates you can apply to an Autotask data entry form to quickly populate fields that consistently use the same data.) and 'Incoming Email Processing' (Set up an Autotask feature that searches the Subject line and Body text of incoming emails for special text that is used to create) are visible. The 'Incoming Email Processing' section is highlighted with a red box and a red arrow labeled '3'.

Search








PAMELA^^ PIERCE | LOGOUT




← INCOMING EMAIL PROCESSING

Incoming Email Processing allows you to send an email to a specified email address, and have that email converted into a ticket, ticket note, ticket time entry, project note, task note, or task time entry. You can also configure your mail server to redirect emails to an Email Processing Mailbox so your customers' emails can be converted into a ticket, ticket note, project note, or task note.



[+ New](#)

	Mailbox Name	Last Updated	Last Updated By	Active
4	Add Ticket Email Service (ATES)	08/14/2017 10:14 AM	Pierce, Pamela^^	✓
	Issues	07/20/2017 02:54 PM	Pierce, Pamela^^	✓

 Search   +    

PAMELA** PIERCE | LOGOUT   

EMAIL PROCESSING MAILBOX - ISSUES ?

 Save & Close  Cancel

General
Ticket
Ticket Note
Ticket Time Entry
Project Note
Task Note
Task Time Entry

GENERAL

Mailbox Name *

Active

Mailbox Email *

issues.UPLEVELSANDBOX.COM@email.pr.autotask.net

ATTACHMENTS

If the email has attachments, they will be attached to the parent ticket, project, or task. You can specify if you want to create attachments for images in the email body.

Create attachments for images in email body

INCOMING EMAIL HEADER

If this setting is enabled, the From, To, and CC information contained in the email will be appended to the ticket, time entry, or note that is created.

Append email header information

Connectwise

The screenshot shows the 'Setup Tables' interface in Connectwise. A sidebar on the left contains a menu with items: ConnectWise, My Favorites (Testing), Companies, Sales, Marketing, Procurement, Project, Service Desk, Time & Expense, Finance, System, Setup Tables, My Company, Security Roles, and Members. The main area displays a table with columns: Category, Table, Description, Done, By, and Date. The table contains one entry: Service, IMAP Setup, Define IMAP configurations for Email Connector. Red arrows with numbers 1 through 6 indicate the following steps: 1. Click on 'Setup Tables' in the sidebar. 2. Click on the 'System' icon in the sidebar. 3. Click on the 'Setup Tables' item in the sidebar. 4. Click on the 'IMAP' dropdown arrow in the table header. 5. Click on the 'IMAP Setup' table row. 6. Click on the 'IMAP Setup' table row.

Category	Table	Description	Done	By	Date
Service	IMAP Setup	Define IMAP configurations for Email Connector			



+ New ▾

Recent ▾

Calendar

Chat with Support

Tickets ▾

email connector



Training ▾

ConnectWise

My Favorites (Testing)

Companies

Sales

Marketing

Procurement

Project

Service Desk

Time & Expense

Finance

System

Setup Tables

My Company

Security Roles

Members

Setup Tables > Imap Setup List

Imap Setup List

< + SEARCH CLEAR

Export

View

(No View)



< 1 - 1 of 1 >

Name ^

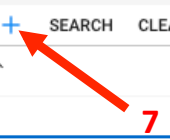
Server

Username

Demo Setup

uplevelsystems.com

robin@uplevelsystems.com





+ New ▾

↶ Recent ▾

📅 Calendar

💬 Chat with Support

Tickets ▾

email connector



Training ▾

ConnectWise <

Setup Tables > Imap Setup List > IMAP Setup

IMAP Setup

< + 📄 📁 ↺ History ▾ 🗑️



IMAP Setup



Name: * _____

IMAP Name: * _____

Processed Name: * _____

Server: * _____

Username: * _____

Password: * _____

Port: * _____ 993 SSL

Test Connection: **TEST**

- ★ My Favorites (Testing)
- 📁 Companies
- 📈 Sales
- 🎯 Marketing
- 🛒 Procurement
- 📑 Project
- 🎧 Service Desk
- 📊 Time & Expense
- ± Finance
- ⚙️ System
- Setup Tables**
- My Company
- Security Roles
- Members

- a. **Name:** Name your setup, call it support, help, or service, really whatever you want. We recommend calling it after its purpose.
- b. **IMAP Name:** This will always be the Inbox, so please put the word "Inbox".
- c. **Processed name:** This is name of the Processed folder which should be called Processed. Putting in just the name Processed will tell the logic that it is a top level folder. If you create the processed folder as a sub-folder of Inbox then you would put Inbox/Processed.
- d. If Unix or Linux based then it would be Inbox.Processed (capitalization matters)
- e. **Server:** This is the name of your IMAP enabled mail server.
- f. **Username:** Username for mailbox being monitored.
- g. **Password:** Password for mailbox being monitored.
- h. **Port:** IMAP has two ports, 143 (non-SSL), and 993 (SSL), you should put whatever is setup for use with your mail service.
- i. If using SSL, be sure to select the SSL check box.
- j. Click **Save**.
- k. Click **Test** once all information has been inputted. Expected outcome is the "OK" signal. This works for On-Premise setups only at this time, does not work in the Cloud Environments.

Connectwise Configuration

For More information about Connectwise, setting up an inbox, or Email Connector please visit:

[https://docs.connectwise.com/
ConnectWise_Documentation/001/
System_Administration/Email_and_Calendar/
007](https://docs.connectwise.com/ConnectWise_Documentation/001/System_Administration/Email_and_Calendar/007)

[https://docs.connectwise.com/
ConnectWise_Documentation/090/020/170/040?
psa=1&v=](https://docs.connectwise.com/ConnectWise_Documentation/090/020/170/040?psa=1&v=)



RepairShopr

Settings Pages

- General Settings
- Customer Settings
- Invoice Settings
- Estimates Settings
- Tickets Settings**
- Parts Settings
- Inventory Settings
- POS Settings
- Leads Settings
- Employee Settings
- Website Integrations

⚙️ Tickets Settings

[Back to Admin](#) [FAQ](#)

- Send Diagnosis Reminders: Daily
- Send Diagnosis Reminders: Hourly
- Copy private Ticket update emails to hidden comment email
- Require Intake Form with Ticket
- Tickets do not email initial problem by default
- Tickets do not email comments by default
- Enable Due Dates
- Enable Ticket Assignment
- Create Tickets from Leads (if valid)
- Enable Ticket Time Tracking module
- Enable Recurring Tickets
- Hide Ticket Status in Customer Portal
- Show Ticket Types in Tickets List Page
- Enable Ticket Priorities

Subject for Ticket Comment Emails

Private Staff Email (we send many notifications here)

Inbound Email Alias (defaults to: www@www.com@reply.repairshopr.com)

Tech Reminder Email (We send some reminder notifications here that are meant to go to all your technicians)

Ticket problem types

Ticket status list

test x test again x

Add item