

# The All-mighty Trio: Documents, BPmail & Templates

By Arwen Van Wyk  
Training Co-ordinator at Business Pilot  
October 4th, 2023



# WHAT WE WILL COVER

- Document Templates
- Using BPmail
- Email Templates
- Fields & Placeholders
- Task Templates
- How templates link in with Status Progressions

# ADDING & EDITING DOCUMENT TEMPLATES

BusinessPilot Admin

- Enquiries
- Contacts
- Leads
- Contracts
- Diary
- Schedule
- Orders
- Stock
- Service
- Finance
- MI
- Reports
- Export
- Admin

Admin

- Company & Users
  - Company Settings
  - Branches
  - Users
  - Custom Fields
- Contract & Products
  - Contract/Lead Types
  - Product Interests
  - Product Types
  - Purchase Order Route
  - Of Issues
  - Object Tags
- Documents & Images
  - Document Tags
  - Document Templates
  - Document Types
  - Image Types
- Emails
  - Email Templates
- Finance
  - Invoice Types
  - Nominal Codes
  - Payment Methods
  - VAT Codes
- Sales & Marketing
  - Enquiry Labels
  - Contact Types
  - Lead Sources
  - Lead Sub Sources
  - Marketing Targets
- Status Progression
  - Lead Pipelines
  - Contract Pipelines
- Schedule Fitting
  - Boards
  - Reasons For Deletion
  - Settings
  - Teams
  - Team Types

### Manage Document Templates

+ Add Document Template

Name	Document Type	Document	Active	
01. Invoice	Invoice	Business Pilot - Invoice Template from Novemeber 2022 (7).docx		<a href="#">Edit</a> <a href="#">Delete</a>
02. Statement/Receipt	Contract	Business Pilot - Statement Template from Novemeber 2022.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
03. Purchase Order	Purchase Order	Business Pilot - Purchase Order Template from Novemeber 2022.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Additional - Installation Completion Report	Contract	Additional - Installation Completion Report v0722.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Additional - Prep for Install - Removal of Existing Frames	Contract	Additional - Preparation for Install Advice - Removal of Existing Frames v0722.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Additional - ProForma	Contract	Additional - ProForma.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Additional - Welcome Letter	Contract	Welcome Letter (additional).docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Arwen Test	Contract	N&P Test.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>

10 items per page 1 - 8 of 8 items

# ADDING & EDITING DOCUMENT TEMPLATES


Add Document Template

New Document Template

Template Type  
-- Select --

Name

Template File  
Select files...



Edit Document Template

Update Document Template


Template Type  
Contract

Name  
Additional - ProForma

Template File  
View uploaded file: Additional - ProForma.docx  
Replace template

Active

Update




+ Add New

Name	Active	Default View In App?	
App	✓	✗	<a href="#">Edit</a> <a href="#">Delete</a>
Contract	✓	✗	<a href="#">Edit</a> <a href="#">Delete</a>
Enquiry	✓	✗	<a href="#">Edit</a> <a href="#">Delete</a>
Quote	✓	✗	<a href="#">Edit</a> <a href="#">Delete</a>

1 10 items per page 1 - 4 of 4 items

# ADDING & EDITING DOCUMENT TEMPLATES

'i' is your friend...

Manage Document Template 

[+ Add Document Template](#)

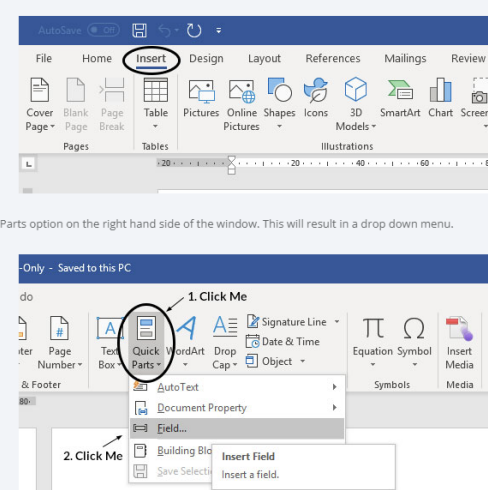
Name ↑	Document Type	Document	Active	
01. Invoice	Invoice	Business Pilot - Invoice Template from November 2022 (7).docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
02. Statement/Receipt	Contract	Business Pilot - Statement Template from November 2022.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
03. Purchase Order	Purchase Order	Business Pilot - Purchase Order Template from November 2022.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Additional - Installation Completion Report	Contract	Additional - Installation Completion Report v0722.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Additional - Prep for Install - Removal of Existing Frames	Contract	Additional - Preparation for Install Advice - Removal of Existing Frames v0722.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Additional - ProForma	Contract	Additional - ProForma.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Additional - Welcome Letter	Contract	Welcome Letter (additional).docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Arwen Test	Contract	N&P Test.docx	✓	<a href="#">Edit</a> <a href="#">Delete</a>

10 items per page

### Creating a document template

The first task you will need to do is to either take your existing documents and convert them to compatible templates or create a new document from scratch. Within these documents wherever you wish for there to be a placeholder field you follow the below process to insert a field. When creating a document and inserting placeholders you can refer to the sections below to see what fields are available for the type of document you are creating. The tables of available fields show what you need to name the field and also an example output from the field might be.

1. Open Microsoft Word. This can be Microsoft Word 2011 (For Mac), 2013, 2016 or Office 365.
2. Click on the Insert tab on the top left hand of the Window.
3. Once the Insert tab is active, click on Quick Parts option on the right hand side of the window. This will result in a drop down menu.



The screenshot shows the Microsoft Word ribbon with the 'Insert' tab selected. The 'Quick Parts' button is circled, and its dropdown menu is open, showing options like 'Field...', 'Document Property', 'AutoText', 'Building Blocks', and 'Save Selections'. The 'Field...' option is highlighted, and its sub-menu is visible, showing 'Insert Field' and 'Insert a field...'.



The perfect bi-folding door options  
for your home in **Castle Combe**

# Welcome home



## The important bits...

Dear Mrs Jones,

Thank you for trusting Seal Windows to install your new windows and doors. Here are some details regarding your installation for you to keep safe in case you need to reference them in the future.

You will receive your FENSA certificate in due course, as well as details on your Insurance Backed Guarantee policy. Please keep these safe in case you need them in the future

We've also included some handy cleaning and maintenance tips here, to keep your windows and doors looking newer for longer!

### Helpful Details

Installation completed on:  
21 September 2023

Your fitting team:  
Steve & John

Your FENSA Certificate Number:  
75896

Customer Care Team  
Contact Details:  
aftercare@seal.co.uk  
01332 795846

## Care & Maintenance



Your new windows and doors are easy to maintain and keep looking new for years to come.

To keep them looking their best, wipe down your window and door frames using warm, soapy water, then rinse thoroughly and buff with a soft, micro-fibre cloth for extra shine!

For gleaming glass, use a glass cleaner and use a soft cloth or sponge in circular motions to clean the glass unit.

Use a squeegee to dry the glass, starting at the top corner to avoid streaks - you can also use a soft cloth for this.

## Top Tips



- ★ Remove rings, jewellery and watches before cleaning to avoid any scratches
- ★ Use crumpled up newspaper to buff your glass for streak-free shine
- ★ Invest in a window vacuum cleaner for even speedier cleaning
- ★ Never use abrasive cloths or solvent-based cleaning products

# The important bits...

→ Dear Mrs Jones,

→ Thank you for trusting Seal Windows to install your new windows and doors. Here are some details regarding your installation for you to keep safe in case you need to reference them in the future.

You will receive your FENSA certificate in due course, as well as details on your Insurance Backed Guarantee policy. Please keep these safe in case you need them in the future

We've also included some handy cleaning and maintenance tips here, to keep your windows and doors looking newer for longer!

## Helpful Details

Installation completed on:  
21 September 2023

Your fitting team:  
Steve & John

Your FENSA  
Certificate Number:  
75896

Customer Care Team  
Contact Details:  
aftercare@seal.co.uk  
01332 795846



# BPmail

Contract Number: TSO1114  
Customer: Ms N Whiteford  
BP Email: I-1292-BEDG@...

## Edit Contract

Contract Details | Activity | Documents | Images | Templates | Appointments | Invoices | Purchase Orders | Fitting | Guarantees | Service | Finance | Custom Fields

Allocated To Surveyor > Created | Order Processing | Installation Scheduled | Completed | Cancelled

### Contact Info

**Billing Contact**  
Ms Natalie Whiteford  
01502 631279  
07227 502269  
natalie.whiteford@example.co.uk  
whiteford.natalie@example.co.uk

**Billing Address**  
78 Butternut Point  
Sutton  
England  
RH5 3HF

**Install Address**  
78 Butternut Point  
Sutton  
England  
RH5 3HF  
0.0 miles  
00:00

### Contract Detail

Contract Supply Type: Supply and Fit  
Contract Status: Active  
Payment Method: Cash  
Contract Value (Net): £125.00  
VAT Code: T1 (20%)  
Current Owner: -- Select --

### Status

Change Pipeline  
Pipeline: Standard Contract Pipeline  
Created: 27/10/2022 09:49  
Installation Scheduled: 03/02/2023 18:52  
Allocated To Surveyor: 04/04/2023 12:09

### Key Dates

Contract Date: 27/10/2022 10:50

Unique email address example:  
I-1292-BEDG@bpapp.email

# BPmail INBOX

Edit Contract

Contract Number: TSO1114  
Lead Number: 1292  
Customer: Ms N Whiteford   
BP Email: I-1292-BEDG@...

Contract De Activity Documents Images Templates Appointments Invoices Purchase Orders Fitting Guarantees Service Finance

Custom Fields

Emails Tasks

## Emails

Search...

Rebecca Taylor **Received**

Fw: Enquiry 17/11/2022

Kind Regards, Rebecca Taylor Training & Operations Manager <https://businesspil...>

**Fw: Enquiry**

Rebecca Taylor <rebecca.taylor@businesspilot.co.uk>

Thu 17/11/2022 10:15

**To:** I-1292-BEDG@bpapp.email

Kind Regards,

**Rebecca Taylor**  
Training & Operations Manager

**From:** Rebecca Taylor <rebecca.taylor@businesspilot.co.uk>  
**Sent:** 17 November 2022 09:14  
**To:** Rebecca Taylor <rebecca.taylor@businesspilot.co.uk>

**New Message**

# SENDING EMAILS

**Compose Email** [X]

Send Email

From Email  
The Team at Business Pilot (CRM) <email@businesspilot.co.uk>

To [ + CC + BCC ]

CC [ I-1292-BEDG@bpapp.email X ]

Email Template [ --Select Template-- ]

Subject

Email Content

Attach Existing [ Select attachments ] Attach new [ Select files... ]

[ Send Email ]

**Select Attachments** [X]

Documents

Invoices

Invoice\_1324.pdf Invoice\_1338.pdf

Images

Templates

Purchase Orders

Invoices

[ Attach Invoice(s) ]

# BPmail TEMPLATES

Business Pilot Admin interface showing the 'Admin' menu item highlighted in the sidebar and the 'Emails Email Templates' menu item highlighted in the main content area.

Table of Email Templates:

Name	Subject	Email Type	Document Templates	Active	
Cancellation Notice	{Company Name} - Cancellation Notice	Contract		✓	<a href="#">Edit</a> <a href="#">Delete</a>
Contract - Showroom Location	Business Pilot CRM - Let's discuss your project in our showroom	Contract		✓	<a href="#">Edit</a> <a href="#">Delete</a>
Contract - Survey Appointment Confirmation	Business Pilot CRM - Survey Appointment Confirmation	Contract	02. Statement/Receipt	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Deposit Invoice & Surveyor Appointment	{Company Name} - Deposit Invoice	Contract	Additional - ProForma	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Enquiry - Brochure Download	Business Pilot CRM - Thank you for downloading our brochure	Enquiry		✓	<a href="#">Edit</a> <a href="#">Delete</a>
Enquiry - Unable to contact (Evolution Products)	Business Pilot CRM - Your recent enquiry for {Enquiry Product Interest}.	Enquiry		✓	<a href="#">Edit</a> <a href="#">Delete</a>
Final Payment Chaser	{Company Name} - IMPORTANT - Balance Required	Invoice	01. Invoice	✓	<a href="#">Edit</a> <a href="#">Delete</a>
Final Payment Chaser (FENSA)	{Company Name} - Final Payment Request	Contract	02. Statement/Receipt	✓	<a href="#">Edit</a> <a href="#">Delete</a>

### Add Email Template

#### New Email Template

Template Type  
-- Select --

Name

Subject  
 Insert Placeholder Company Accounts Email

Email Content

**B** *I* (inherited size) U Format **A**

Company Accounts Email

Document Templates To Attach By Default

### Edit Email Template

#### Update Email Template

Template Type  
Contract

Name  
Cancellation Notice

Subject  
 Insert Placeholder Company Accounts Email

{Company Name} - Cancellation Notice

Email Content

**B** *I* (inherited size) U Format **A**

Company Accounts Email

Dear {Contact Salutation} {Contact Last Name},

Our team wishes you the best with your project, and if we can be of any assistance to you, please feel free to contact us. We have received your cancellation, and your deposit will be returned within 5 to 7 working days.

Document Templates To Attach By Default

Active

**NEW FEATURE**  
Insert images into the email template as an embedded image, rather than as an attachment.

# TASK TEMPLATES



Type to search...



- Enquiries
- Contacts
- Leads
- Contracts
- Diary
- Schedule
- Orders
- Stock
- Service
- Finance
- MI
- Reports
- Export
- Admin

- Company & Users**
  - Company Settings
  - Branches
  - Users
  - Custom Fields
- Contract & Products**
  - Contract/Lead Types
  - Product Interests
  - Product Types
  - Object Tags
- Documents & Images**
  - Document Tags
  - Document Templates
  - Document Types
  - Image Types
- Emails**
  - Email Templates
- Finance**
  - Invoice Types
  - Nominal Codes
  - Payment Methods
  - VAT Codes
  - Purchase Order Route
  - Of Issues
- Sales & Marketing**
  - Enquiry Labels
  - Contact Types
  - Lead Sources
  - Lead Sub Sources
  - Marketing Targets
  - Project Types
  - Reasons For Loss
  - Sales Areas
  - Sales Years
- Status Progression**
  - Lead Pipelines
  - Contract Pipelines
- Schedule & Fitting**
  - Boards
  - Reasons For Deletion
  - Settings
  - Teams
  - Team Types
- Service**
  - Service Call
  - Route Of Issues
- BPsite App**
  - View
  - Notifications
- Tasks**
  - Task Templates
- System Integrations**
  - FENSA
  - Tommy Trinder
  - Xero



Name	Description	Type	
Sales - Arrange Quote	Please arrange a quotation and upload it to the system. Remember to add the quoted value to the Customers Lead page	Lead	<a href="#">Edit</a> <a href="#">Delete</a>
Accounts - Chase Deposit	Please ask the customer to clear their deposit invoice so we can confirm their survey appointment.	Contract	<a href="#">Edit</a> <a href="#">Delete</a>
Accounts - Raise Invoice	Please raise the necessary invoice	Contract	<a href="#">Edit</a> <a href="#">Delete</a>
Operations - Arrange Installation	Please organise the installation in the Schedule Board and confirm with the customer	Contract	<a href="#">Edit</a> <a href="#">Delete</a>
Operations - Issue Warranties	This contract is now all complete and paid and therefore, please kindly issue warranties and update the customer.	Contract	<a href="#">Edit</a> <a href="#">Delete</a>
Operations - Critical Path	Please call the customer with an introduction to Operations and discuss the critical path of the build/project.	Contract	<a href="#">Edit</a> <a href="#">Delete</a>
Accounts - Job Costing Check	Please carry out all necessary Job Costing checks	Contract	<a href="#">Edit</a> <a href="#">Delete</a>
Sales - Chase Deposit	Please ask the customer to clear their deposit invoice so we can confirm their survey appointment and finalise the contract details.	Lead	<a href="#">Edit</a> <a href="#">Delete</a>
Sales - Quote Follow Up	Please call the customer and check if they received the quotation and see if they have any initial feedback for us, good or bad. Remember to lead		<a href="#">Edit</a> <a href="#">Delete</a>
Planning Status	Please contact th		<a href="#">Edit</a> <a href="#">Delete</a>

**Edit**

Name: Sales - Arrange Quote

Description: 

Please arrange a quotation and upload it to the system. Remember to add the quoted value to the Customers Lead page





Type: Lead

[Update](#) [Cancel](#)



# DEFAULT TASK OWNER

Progressions + Add Progression

From Statuses	To Statuses	Actions
Created Followed Up	Demo Booked	 
Followed Up	Any	 

Edit Progression ×

From Statuses  
Followed Up ×

To Statuses

Actions  
No actions added

Add Action

Action

Task Template To Use

Task Default Owner (Optional)  
  
  
Sales Person  
Surveyor  
User Progressing

+ Add Action

Update

# FIELDS & PLACEHOLDERS

Field	Placeholder	Example
Current date	«CurrentDate»	29/09/2023
Company's name	«CompanyName»	Business Pilot
Company's address	«CompanyAddress»	14 Pilot Way Amersham Buckinghamshire HP7 0PX
Company's address line	«CompanyAddressLine»	14, Pilot Way, Amersham, Buckinghamshire, HP7 0PX
Company's number	«CompanyNumber»	123456
Company's VAT Number	«CompanyVATNo»	1234567890
Company's main phone	«CompanyMainPhone»	01234 567890
Company's main email	«CompanyMainEmail»	demo@businesspilot.co.uk
Company's accounts phone	«CompanyAccountsPhone»	01234 123456
Company's accounts email	«CompanyAccountsEmail»	accounts@businesspilot.co.uk
Company's installations phone	«CompanyInstallationsPhone»	01234 234567
Company's installations email	«CompanyInstallationsEmail»	installations@businesspilot.co.uk
Company's service calls phone	«CompanyServiceCallsPhone»	01234 234567
Company's service calls email	«CompanyServiceCallsEmail»	service@businesspilot.co.uk
Company's bank name	«CompanyBankName»	HSBC
Company's bank sort-code	«CompanyBankSortCode»	01-02-03

Contract payment schedule	«ContractPaymentSchedule»	<table border="1"> <thead> <tr> <th>Details</th> <th>Net Amount</th> <th>VAT Rate</th> <th>Gross Amount</th> </tr> </thead> <tbody> <tr> <td></td> <td>£12,176.04</td> <td>£2,435.21</td> <td>£14,611.25</td> </tr> <tr> <td></td> <td>£12,176.04</td> <td>£2,435.21</td> <td>£14,611.25</td> </tr> <tr> <td></td> <td>£12,176.04</td> <td>£2,435.21</td> <td>£14,611.25</td> </tr> <tr> <td></td> <td>£12,176.04</td> <td>£2,435.21</td> <td>£14,611.25</td> </tr> <tr> <td></td> <td>£5,000.00</td> <td>£1,000.00</td> <td>£6,000.00</td> </tr> <tr> <td></td> <td>£791.67</td> <td>£158.33</td> <td>£950.00</td> </tr> <tr> <td></td> <td colspan="2"><b>Total Contract Value</b></td> <td><b>£0.00</b></td> </tr> <tr> <td></td> <td colspan="2"><b>Invoiced To Date</b></td> <td><b>£65,395.00</b></td> </tr> <tr> <td></td> <td colspan="2"><b>Payments Received</b></td> <td><b>£64,395.00</b></td> </tr> <tr> <td></td> <td colspan="2"><b>Balance</b></td> <td><b>£1,000.00</b></td> </tr> </tbody> </table>	Details	Net Amount	VAT Rate	Gross Amount		£12,176.04	£2,435.21	£14,611.25		£12,176.04	£2,435.21	£14,611.25		£12,176.04	£2,435.21	£14,611.25		£12,176.04	£2,435.21	£14,611.25		£5,000.00	£1,000.00	£6,000.00		£791.67	£158.33	£950.00		<b>Total Contract Value</b>		<b>£0.00</b>		<b>Invoiced To Date</b>		<b>£65,395.00</b>		<b>Payments Received</b>		<b>£64,395.00</b>		<b>Balance</b>		<b>£1,000.00</b>
Details	Net Amount	VAT Rate	Gross Amount																																											
	£12,176.04	£2,435.21	£14,611.25																																											
	£12,176.04	£2,435.21	£14,611.25																																											
	£12,176.04	£2,435.21	£14,611.25																																											
	£12,176.04	£2,435.21	£14,611.25																																											
	£5,000.00	£1,000.00	£6,000.00																																											
	£791.67	£158.33	£950.00																																											
	<b>Total Contract Value</b>		<b>£0.00</b>																																											
	<b>Invoiced To Date</b>		<b>£65,395.00</b>																																											
	<b>Payments Received</b>		<b>£64,395.00</b>																																											
	<b>Balance</b>		<b>£1,000.00</b>																																											
Contract outstanding statement	«ContractOutstandingStatement»	Produced a table of invoices where a remaining balance is due																																												
Contract latest service call appointment date time	«ContractServiceCallApptDateTime»	09/10/2023 15:28																																												
Contract latest service call appointment date	«ContractServiceCallApptDate»	04/10/2023																																												
Contract self certification reference	«ContractSelfCertReference»	REF123456																																												
Contract self certification guarantee date	«ContractSelfCertDate»	24/09/2023																																												
Contract guarantee no.	«ContractGuaranteeNo»	REF654321																																												
Contract guarantee date	«ContractGuaranteeDate»	24/09/2023																																												
Contract guarantee No. doors ≥ 50%	«ContractGuaranteeDoorsGTE50Perc»	2																																												



# STATUS PROGRESSIONS

## Edit Contract

⚠ Contract has an outstanding balance of **£13,793.04**.

Contract Number: TSO1065  
Lead Number: 1180  
Customer: Mr R Dinning  
BP Email: I-1180-BEDG@...

Contract Details | Activity | Documents | Images | Templates | Appointments | **Invoices** | Purchase Orders | Fitting | Guarantees | Service | Finance | Custom Fields

**Installation Scheduled** > Created | Allocated To Surveyor | Order Processing | Completed | Cancelled

### Contact Info

#### Billing Contact

Mr Robert Dinning  
01321 117678  
07580 301953  
robert.dinning@example.co.uk  
dinning.robert@example.co.uk

#### Billing Address

1147 Tennessee Park  
London  
England  
WC1B 8KK

#### Install Address

1147 Tennessee Park  
London  
England  
WC1B 8KK

0.0 miles

00:00

#### Contact Type

Trade

#### Surveyor

Rebecca Taylor

#### Sales Person

Ryan Thomas

#### Fitters

2. Steve & Michael

#### Product Type

Aluminium - Origin OW80

#### Product Interest

Window - Flush

### Contract Detail

Contract Supply Type: **Supply and Fit**

Contract Status: **Active**

Payment Method: **Cash**

Contract Value (Net): £57,887.63

VAT Code: T1 (20%)

Current Owner: -- Select --

Contract Type: Trade Supply Only

Survey Required: **Yes**

Surveyor: Rebecca Taylor  
**Booked for Rebecca Taylor**

### Status

Pipeline: **Standard Contract Pipeline** [Change Pipeline](#)

Created: 28/11/2021 11:00

Allocated To Surveyor: 29/11/2021 11:00

Installation Scheduled: 03/02/2023 18:41

#### Key Dates

Contract Date: 28/11/2021 11:00

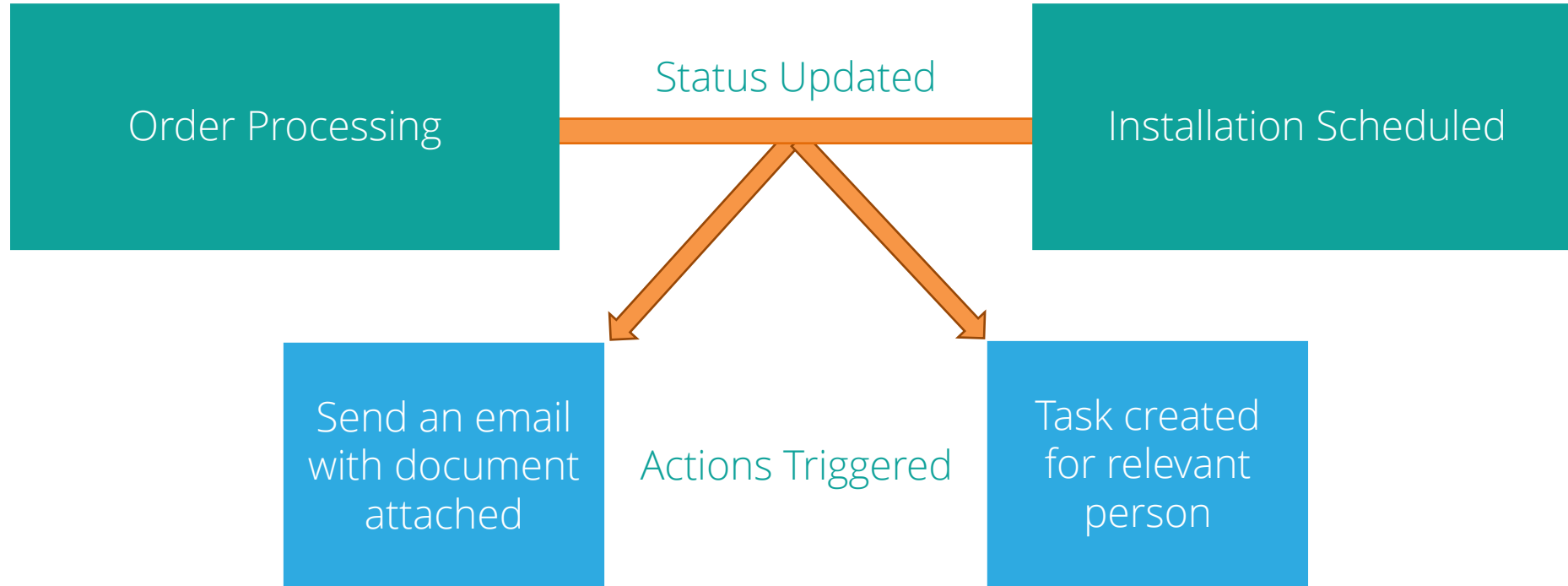
Contract Signed: 28/11/2021 11:00

Survey Date: **02/05/2023 10:00**

Provisional Order: Not Set

Provisional Delivery: Not Set

# STATUS PROGRESSIONS



# STATUS PROGRESSIONS

## Admin

- Enquiries
- Contacts
- Leads
- Contracts
- Diary
- Schedule
- Orders
- Stock
- Service
- Finance
- MI
- Reports
- Export
- Admin

- Company & Users**
  - Company Settings
  - Branches
  - Users
  - Custom Fields
- Contract & Products**
  - Contract/Lead Types
  - Product Interests
  - Product Types
  - Object Tags
- Documents & Images**
  - Document Tags
  - Document Templates
  - Document Types
  - Image Types
- Emails**
  - Email Templates
- Finance**
  - Invoice Types
  - Nominal Codes
  - Payment Methods
  - VAT Codes
  - Purchase
- Sales & Marketing**
  - Enquiry Labels
  - Contact Types
  - Lead Sources
  - Lead Sub Sources
- Status Progression**
  - Lead Pipelines
  - Contract Pipelines
- Schedule & Fitting**
  - Boards
  - Reasons For Deletion
  - Settings
  - Teams

### Statuses

+ Add Status

**Note:** For the pipeline to work there are certain statuses that are required. These are a Created, Completed and Cancelled. The names of these statuses can be changed but the system will prevent you from changing the standing.

Order ↑	Name ↑	Active?	Colour	Flag After (Days)	Standing	
1	Created	✓	Yellow		Created	
2	Allocated To Surveyor	✓	Orange		Active	
3	Order Processing	✓	Light Green		Active	
4	Installation Scheduled	✓	Green		Active	
		✓	Brown		Active	
		✓	Dark Green		Completed	
		✓	Red		Cancelled	

page 1 - 7 of 7 items

### Progressions

+ Add Progression

From Statuses	To Statuses	Actions	
Any	Cancelled	Add Note	
Created	Allocated To Surveyor	Add Task	
Created	Allocated To Surveyor		
Allocated To Surveyor	Order Processing	Send Email	
Order Processing	Installation Scheduled	Send Email	
Installation Scheduled	Review Sent		
Review Sent	Completed		

20 items per page 1 - 7 of 7 items

# STATUS PROGRESSIONS

The image displays the 'Edit Progression' interface, which is used to define how a system status changes and what actions are triggered during the transition.

**Main Interface:**

- From Statuses:** A list of current statuses. One status, 'Allocated To Surveyor', is highlighted with a blue pill and an 'x' icon.
- To Statuses:** A list of target statuses. One status, 'Order Processing', is highlighted with a blue pill and an 'x' icon.
- Actions:** A list of actions to be performed during the transition. The first action is 'Materials in Production' (with an envelope icon), and the second is 'Send Email' (with a trash icon). An orange arrow points from the 'Send Email' action in this list to the 'Add Action' modal.
- Buttons:** An orange circle highlights a '+ Add Action' button on the right side of the main interface. At the bottom right, there is an 'Update' button.

**Modal Windows:**

Three 'Add Action' modal windows are shown, illustrating the configuration options for different actions:

- Modal 1:** Shows 'Action' set to 'Send Email' and 'Email Template To Use (Optional)' set to 'Cancellation Notice'. It has 'Cancel' and 'Add' buttons.
- Modal 2:** Shows 'Action' set to 'Add Task' and 'Task Template To Use' set to 'Lead Added'. It also has 'Task Default Owner (Optional)' set to 'Sales Person'. It has 'Cancel' and 'Add' buttons.
- Modal 3:** Shows 'Action' set to 'Change Field' and 'Field To Change' set to 'Quoted Value Net'. It has 'Cancel' and 'Add' buttons.