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MobileAsset v7.1 Terminology: Alerts, Email, Reminders, Lead Time, Maintenance, Check Out

Scott Leonard - 2020-08-03 - in Software

MobileAsset combines the following terms in different ways to accomplish different but related features: Alerts, Email, Reminders, Lead Time, Maintenance, Check Out. This article discusses the various features and where they are configured in MobileAsset.

Alert: A notice that a checked-out asset, contract, or maintenance is upcoming, due, or overdue. Alerts show in the Alerts menu, and optionally can be emailed daily (see Administration, Options, Alert). Alerts are available in the Professional and Enterprise editions of MobileAsset, but not in the Standard edition. Emailed alerts are sent by the PC running the Wasp MobileAsset Windows Service.

The "Assets Past Due" alerts are sent to the email address specified in the Customer or Employee that the asset is checked out to (as well as the "Alerts To Emails" address). If there is no email address specified for the Customer or Employee, no alert will be sent.

Reminder: A one-time email containing an .ICS appointment file that can be added to a calendar (Gmail, earlier versions of Outlook, Windows Live, Yahoo), regarding a check-out due date, or maintenance due date.

Note 1: Reminders are always sent immediately, from the client PC where the reminder was created, by the email address specified in the logged-in MA user's profile. Only one reminder email is sent.

Note 2: The Reminder Lead Time value is incorporated into the ICS file settings that configures the calendaring program's reminder feature. MobileAsset does not send any followup email corresponding to the Reminder Lead Time.

Note 3: When using Outlook, and the ICS file is double-clicked, it opens, and most of its contents are visible, but the Save option is not available. It can be added to Outlook manually, as described in this Microsoft article:

<https://support.microsoft.com/en-us/kb/287625>. Once imported, the appointment reflects the due date/time, and the reminder time reflects the lead time specified.

Note 4: References to "Reminder Alerts" in the Help files should be interpreted as Reminders.

Administration, Options, Alert: configures various alert features.

- **Email Alerts:** Yes to enable emailing of alerts.
- **Maintenance Alerts:** applies only to the Dashboard's "Upcoming Maintenance List" widget.
- **Time To Check for Alerts:** 24-hour time format, requires colon character. For example, for 1:30pm, specify 13:30

Administration, Options, Reminder: configures various reminder features.

- **Email Check Out Due Reminders:** Yes to enable.
- **Email Maintenance Due Reminders:** Yes to enable. See also "Should Email" below.

Check out Lead Time: indicates how long after an asset is received, checked in, etc. before it is available. The lead time allows time for recalibration, cleaning, etc.

Maintenance Schedule: Creating or editing a scheduled maintenance for an asset.

- **Should Email:** enables emailing a reminder for this maintenance schedule. "Email Maintenance Due Reminders" must also be set to Yes (see above).
- **Reminder Lead Time:** Configures the ICS file as described above in Reminder, Note 2.

The **Maintenance Reminder** is emailed when the following conditions are met:

1. The Yes box is checked in Administration, Options, Reminder, Email Maintenance Due Reminders.
2. The Maintenance Schedule window has an Employee specified.
3. The specified Employee has a valid email address specified. If not, no email will be sent, and there is no error message.
4. "Should Email" is checked.
5. The Save button is clicked on the Maintenance Schedule window, and the OK button is clicked on the Edit Asset window. The email is sent immediately following, by the MobileAsset PC client (not the Wasp MobileAsset Windows Service on the server).

The **Check Out Reminder** is emailed when the following conditions are met:

1. The Yes box is checked in Administration, Options, Reminder, Email Check Out Reminders.
2. The specified Customer or Employee has a valid email address specified. If not, no email will be sent, and there is no error message.
3. The Check Out button is clicked. The email is sent immediately following, by the MobileAsset PC client (not the Wasp MobileAsset Windows Service on the server).

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