

## Emails in your iBex system

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### 1. Overview.

You can send emails from your iBex system and decide whether the email is sent from the Operator (*the email address on the Maintain Accounts page*) or the Property (*the email address on the Maintain Property Details page*).

You can also set your iBex system to automatically send any specific email to your guests either before or after their stay.

You can construct and send your own templates by using 'tags' that will automatically enter the guest and booking details into the email.

## 2. How to send an email.

### Version 4 ...

If you want to send a guest an email you need to go into their booking, select the Lead Guest tab and click New Email.

**Booking #1327**

Rooms Extras **Lead Guest** Notes Check in/out Finance More

**Lead Guest**

Search Customers Jimmy Snook Clear All Customers **New Email** View Log

**Name**

Title	First	Last
<input type="text"/>	Jimmy	Snook

**Phone Numbers**

Mobile

### Version 3 ...

Once in the booking, click the Email button at the bottom of the page ....



Once clicked it will take you to a new window where you can free format an email or load one of your email templates.

The customer's email will automatically be entered into the 'To:' field if it's on the Lead Guest details page. You can change the email if required.

You can also include several options to be attached as links at the bottom of the email before sending.

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### 3. Manage Auto Emails.

You get to the Manage Auto Emails Page in the Users & Clients section. This screen defines who will get auto emails when bookings are created, confirmed or cancelled. The fields and functions on this screen are explained below:

#### Column Definitions:

**New Bookings** – This column is for new bookings that are created. The *OnReq* subcolumn refers to bookings received on request and the *Cnfrm* subcolumn refers to bookings received with instant confirmation.

**On Request Bookings** – This column is for existing bookings that were received on request. The *Op Cnfrm* subcolumn refers to on request bookings confirmed by the operator. The *Op Cancel* subcolumn refers to on request bookings that have been rejected or cancelled by the operator. The *Prop Cnfrm* and *Prop Cancel* are the same but being confirmed, rejected or cancelled by the property.

**Cnfrm Bkngs Cancel** – This column is for existing confirmed bookings that have been cancelled either by the operator or by the booking party.

#### Row Definitions:

**From iBex to You**- An email addressed as coming from iBex and addressed to the email address in the Operator screen to notify you of an event.

**From You to Property**- An email addressed as coming from the email address in the Operator screen to the email address in the Property screen to notify the property of an event.

**From You to Customer** - An email addressed as coming from the email address in the Operator screen to the email address supplied by the customer to notify the property of an event.

**From You to Agent** - An email addressed as coming from the email address in the Operator screen to the email address in the Registered User screen for the agent to notify the agent of an event.

**Front Screen Activate** – This means that any booking, request or cancellation which is made on your booking page on your website will follow these rules.

**Back Screen Booking Activate** – This means that any booking, request or cancellation made directly in your iBex system follows these rules (although this can be over-riden when making bookings, etc if required).

You can also add links to the emails ...

**Attach Brochure** – If ticked, this will include a link to the printable brochure in the email notification to the various parties.

*To view your brochure, select View Property Brochure in the Property Maintenance section in the Menu Bar.*

**Attach Receipt** – If ticked, this will include a link to the printable booking receipt in the email notification to the various parties.

*NB. This receipt is also available when the party creates a booking but the email allows them to access this receipt again if required.*

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## 4. Email Templates.

If you send the same email regularly, you can set up an email template. Just a couple of examples of email templates would be ...

- Pre-arrival Welcome email
- Thank you for your stay
- Booking Amendment
- Final Payment Due
- Final Payment Received

You can enter 'tags' in the templates so any information from the booking will be automatically pulled from the booking and entered into the email (eg the name of the client, their booking details, etc). See '5. Tag's you can use in templates' below for a list of tags that you can use.

### To create an email Template ...

- When in the Email Templates page (in the Users & Clients section), click New at the bottom
- Template Name - This is not seen by the guest . Name it is so that you recognise it when you are selecting from your list of templates
- Private – only tick this if you do not want all users to be able to use the template
- From – select if you want the email sent from the Property or Operator email address
- Subject – This is the subject that the guests will see. (NB. You can enter tags in the Subject aswell as the email itself).

Then write the email as you want it.

*Tip. If you want your Logo on the template, you can copy and paste it from your Logo page (which is found at the bottom of the Maintain Account Details page). You can also enter the tag references that you want to be automatically entered in the email (eg. Dear {FirstName}, would appear as Dear John,) - see 5. Tag's you can use in templates below.*

Click Save once completed.

Once you have saved a Template, it's best to test what it looks like by going into any booking, and sending a New email.

You can then change the email address to yours and Load the new template that you have just set up to see what it looks like.

*NB. Before sending the email you can add further links by ticking the required box's at the bottom of the page.*

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## 5. Tag's you can use in your email templates.

Here is a list of the tags that you can use so that the guest information from the booking is automatically entered into the email.

***To use a tag, just enter the tag where required (eg. Dear {FirstName}, would appear as Dear John,):***

### Customer Information

{LastName}, {FirstName}, {Customer[title]}	<b>appears as</b>	Test, John, Mr
{CustomerFullName}		John Test
{Customer[email]}		support@ seekom.com
{Customer[phone]}, {Customer[cellphone]}		+64 4 9748008, +64 221 123456
{Customer[street]}, {Customer[suburb]}		81 Elizabeth Street, Mt. Victoria
{Customer[city]}, {Customer[postcode]}		Wellington, 6142
{Customer[country]}		New Zealand
{CustomerFullAddress}		81 Elizabeth Street Mt. Victoria Wellington 6142 New Zealand

The tags that you use to pull booking information from the booking into the email are:

### Booking Information

{Reference}, {Status}	<b>appears as</b>	1001, Confirmed
{Arrive}, {Depart}		Monday, 7 July 2012, Tuesday, 9 July 212
{RoomInfo}		1 x Standard Room
{Booking[totpax]} (Number of guests)		2 (Number of guests)
{BookingTotal}		100
{Deposit}		10 (if set at 10% in your iBex system)
{BalanceRequired}		90
{BookingTotalFormatted}		\$100
{DepositFormatted}		\$10
{BalanceRequiredFormatted}		\$90

The tags that you can use to pull Property information into the email are:

{From['name']}	<b>appears as</b>	<b>Arapawa Luxury Retreat</b>
Tel: {From['phone']}		Tel: 0800 2727232
Fax: {From['fax']}		Fax: 04 123456789
Email: {From['email']}		Email: support@seekom.com

You can also add a couple of links for your brochure or a booking receipt:

Click {LinkBrochure} for brochure	<b>appears as</b>	Click <a href="#">here</a> for brochure
Click {LinkReceipt} for booking receipt		Click <a href="#">here</a> for booking receipt

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## 6. Email Template Examples

Here are 4 examples of email templates (Pre-arrival Welcome email, Thank you for your Stay email, Booking Amendment, and Final Payment due):

### *Pre-arrival Welcome email ...*

Subject: Welcome {CustomerFullName} to Arapawa Nirvana Retreat

Dear {FirstName},

We are looking forward to your arrival on {Arrive}.

If you have any special requests or any questions, please feel free to let us know.

See you soon!

The Team

**{From['name']}**

Tel: {From['phone']}

Fax: {From['fax']}

Email: [{From\['email'\]}](#)

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### *Thank you for your Stay email ...*

Subject – Thanks for Staying with us!

Dear {FirstName},

Thanks for coming to stay with us, we trust you enjoyed your stay from {Arrive} to {Depart}.

Please come and stay again soon!

Kind regards,

The Team

**{From['name']}**

Tel: {From['phone']}

{?From['fax']} Fax: {From['fax']}

{//} Email: [{From\['email'\]}](#)

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## ***Booking Amendment ...***

Subject: Amendment to your booking {Reference} – {Customer[title]} {FirstName} {LastName}

Dear {FirstName}

Thanks for your email/phone call regarding your booking at {Property[name]}. I have amended your booking as requested, and updated details are below:

- \* Property Name: {Property[name]}
- \* Address: {Property[address]}
- \* Room Info: {RoomInfo}
- \* Booking Name: {Customer[title]} {FirstName} {LastName}
- \* Booking Number: {Reference}
- \* Booking Status: {Status}
- \* Arrival: {Arrive}
- \* Departure: {Depart}
- \* No. of nights = {Booking[nights]}
- \* No. of Guests: {Booking[totpax]}
- \* Estimated arrival time = {Booking[esttimearrival]}
- \* Accommodation cost = {Booking[roomCost]}
- \* Extras cost = {Booking[extrasCost]}
- \* Total Cost = {Booking[totalamount]}
- \* Deposit paid = {Booking[deposit]}

You can view an updated copy of your booking receipt {LinkReceipt} and the property brochure {LinkBrochure}.

If you have any questions at all please feel free to contact us on {Property[phone1]} or email {Property[email]}.

Thanks again for your booking, and we look forward to having you stay with us.

Kind regards,

The Team

**{From['name']}**

Tel: {From['phone']}

Fax: {From['fax']}

Email: {From['email']}

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## ***Final Payment due ...***

Subject: Final Payment due for booking {Reference} - {LastName}

Dear {FirstName}

This is a courtesy email to advise you that final payment of {BalanceRequired} will be deducted from your nominated Credit Card within the next few days. Once this transaction has been processed I will also send check in details.

For your records, your booking details are as follows:

- \* Booking Name: {CustomerFullName}
- \* Email: {Customer[email]}
- \* Telephone: {Customer[phone]}, {Customer[cellphone]}
- \* Booking No: {Reference}
- \* Status: {Status}
- \* Property Name: {Property[name]}
- \* Property Type: {RoomInfo}
- \* Arrive: {Arrive}
- \* Depart: {Depart}
- \* No. of Guests: {Booking[totpax]}
- \* Booking Total: {BookingTotalFormatted}
- \* Deposit Paid : {DepositFormatted}
- \* Balance Required: {BalanceRequiredFormatted}

If you have any questions at all please feel free to contact us on {Property[phone]} or email {Property[email]}.

Thanks again for your booking, and we look forward to having you stay with us.

Kind regards,

The Team

**{From['name']}**

Tel: {From['phone']}  
Fax: {From['fax']}  
Email: {From['email']}

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## 7. Scheduled Emails – setting up and sending.

You can now schedule any of your template emails to be automatically sent on guest booking being made, X number of days before arrival, X number of days after departure or on any booking change. This is a great feature to send a final payment request, provide instructions on check in procedure, follow up with a guest survey after departure, etc.

Follow the instructions below to setup rules for scheduling email templates.

Step	Action
1	Log into your Seekom iBex account.
2	From the <b>Users &amp; Clients</b> menu, select <b>Email Scheduler</b>
3	At Selected Rule field select <b>Add New</b> (if adding a new rule) or an existing rule to edit.
4	Check <b>Rule Active</b> field to activate
5	At <b>Rule Name</b> field enter a descriptive name (eg. Thank you for your Stay).
6	Select from <b>Rule type</b> as required. <i>Options are – Send an email after guest's departure, Send an email before a guest's arrival, Send an email after the guest has made a booking.</i>
7	At <b>Email To</b> field, check to send email to <b>Customer, Property</b> and/or complete <b>Other</b> to send email to another address.
8	At <b>Use Email Template</b> select as required.
9	Depending on selection made at step 6 you will have option to set email to be sent a specific number of <b>Days After Departure, Days Before Arrival, or Days After Booking</b> . <i>Tip: If creating your own email templates to be scheduled for booking activity (eg. new confirmed, new on request, enquiries or cancellation) we recommend you set the number of days to zero and also turn off the applicable auto generated email to customer on the 'Manage auto-email rules' page in the 'Users &amp; Clients' section of the menu.</i>
10	If, at step 6, you selected ' <b>Send an email after a guest has made a booking</b> ' you will be presented with the field <b>Applies to Bookings</b> . Check any of 'Confirmed', 'Request', 'Enquiry', 'Cancelled' as required
11	Click <b>Save</b> button.

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