



Support Centre Prime Ecosystem

Updated 27.10.22

Prime Support Centre - Jobs

Prime Instructions | Jobs – How To Send Email

1. From any screen in the job select the Envelope icon on the right hand side of the screen.

The screenshot displays the Prime Ecosystem interface for job DC460. The main content area shows a 'History' section with a search filter and a list of actions from Monday 26th July 2021, including 'Form Generated', 'New Form Created', 'Work Order Modified', 'Quote Created', and 'New Estimate Created'. On the right side, the 'Send Email' panel is open, showing fields for 'To', 'Cc', 'Bcc', and 'Subject'. A red arrow points to the envelope icon in the right-hand navigation bar, and a red box highlights the 'Send Email' panel with the text '1. Select Envelope icon'.

2. Use the Template drop down to select the email template you wish to use. (These can be set up through Administration).
The subject line and body of the email will auto fill as per the template set up. These fields can be edited and added to as needed.

The screenshot shows an email composition window titled "Send Email". At the top right, there are buttons for "New Enquiry" and "Open". Below the title bar, there are "Send Email" and "Add Attachments" buttons. A message states "No attachments have been added". The "Template" dropdown menu is highlighted with a red box and contains the text "Email to Customer - Introduction". A red arrow points to this dropdown with the annotation "Template selected". Below the template, the "Classification *" dropdown is set to "Customer Contact". The "To *" field is empty with a red exclamation mark and the text "This is required". The "Cc" and "Bcc" fields are also empty. The "Subject *" field is filled with "Your Insurance Claim: 123 / DC460". A red arrow points to this field with the annotation "Subject line auto filled.". The "Message *" section contains a rich text editor with a toolbar and the following text: "Dear Scott, We have received your insurance claim from Some Client, a Watermark Constructions representative is reviewing the details. We are experiencing high volumes of claims due to the recent Queensland catastrophe and are doing our best to prioritise the most vulnerable claims. If site attendance is required, you will be in contacted shortly by one of our friendly team. We appreciate your patience". A red arrow points to the text area with the annotation "Body of email auto filled per template.". On the left side, there is an "Expand All" button and a vertical sidebar with various icons.

3. Use the Address Book to select who you want to send your email to. Alternatively, type the email address into the To box.
(The address book is auto populated with anyone assigned on the job, including customer's, clients, subcontractors and internal staff).

Map Reports Register * DC460 x Messages x

New Enquiry Open >


Send Email

Send Email Add Attachments

No attachments have been added

Template: Email to Customer - Introduction

Classification *: Customer Contact










To:  To

Job Address Book

- Instructing Client: Some Client paul@devcon.tech
- Assigned Quote Request: Test Building Company paul@devcon.tech
- Assigned: Alyson Harris alyson@primeecosystem.com.au
- Case Manager: Alyson Harris alyson@primeecosystem.com.au
- Supervisor: Alyson Harris alyson@primeecosystem.com.au

Message *

Paragraph Add Tags/Content Add Images More

B     **A**     

Dear Scott,

We have received your insurance claim from Some Client, a Watermark Constructions representative is reviewing the details.

We are experiencing high volumes of claims due to the recent Queensland catastrophe and are doing our best to prioritise the most vulnerable claims.

If site attendance is required, you will be in contacted shortly by one of our friendly team. We appreciate your patience.

Expand All

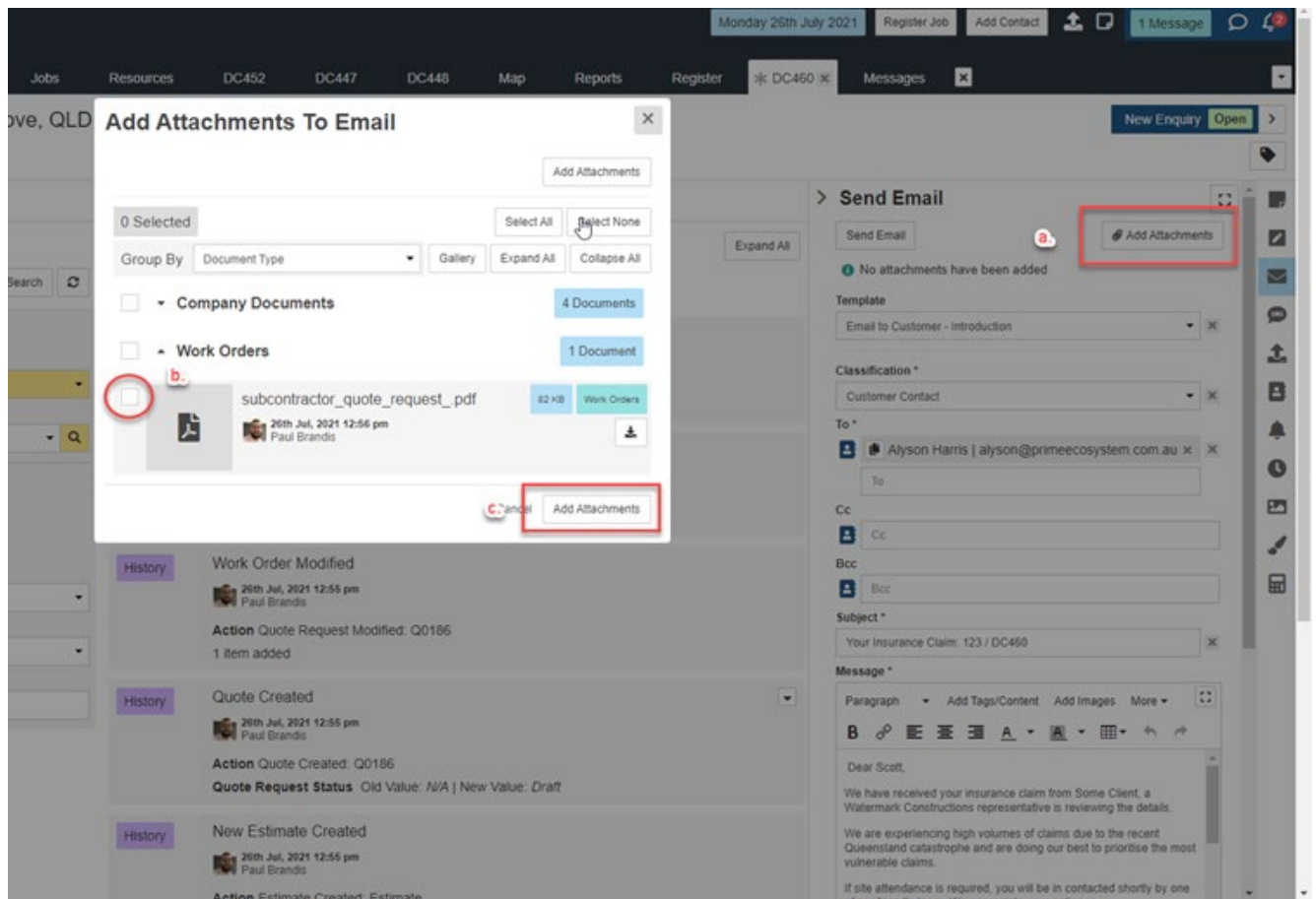
Quote Request

or Quote Request

New Value: Draft

Use the address book to select who you want to send the email to. Or, type the email address into the To box.

4. You can attach any documents or photos to your email that are saved to the Documents section on the job in Prime. You will also be able to access any Company Documents on file.
1. Select Add Attachments button
2. Choose which documents or photos you would like to attach by selecting the check box.
3. Select Add Attachments



- Once you are happy with your email click the Send Email button at the bottom of the screen. When the email has been sent you will see the green success message and the email form will reset itself.

