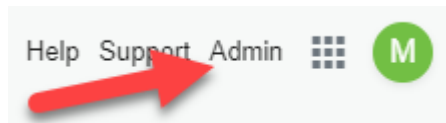# Status Management

Receipt Status Management

Receipt Status Management is a very useful tool. Here you can create a new status, edit any status, add email and/or text notification and setup auto status changes.
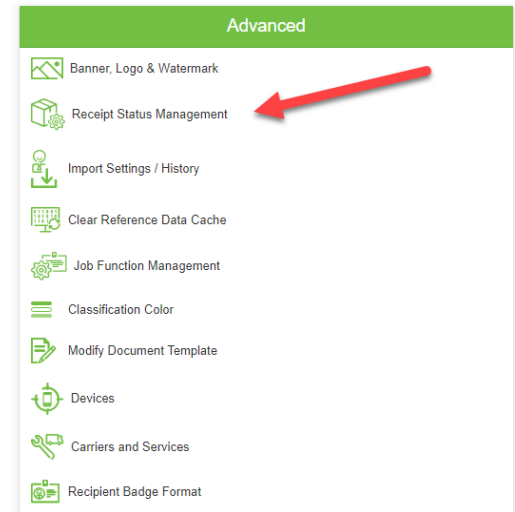
What is a Status?

A status is a change of location of the item that is being tracked. There are many default statuses but if the option is purchased the customer can create their own statuses to help the workflow.

Creating a new Status

1. Go to Admin

2. Select "Receipt Status Management" under Advanced

3. Enter the Code and Description. The code is a short name for the Status that is being created

*Code needs to be capitalized and no spaces

4. Then choose what options you want to use for the status: Requires Signature, Transfer of Custody, Release Package, Share, Action, Hold, Available to Portal Users, Portal Users claim package, Clear Storage Location.

Note: Each option has a description next to it to denote how the package will change with the status change.

5. Select "Add Receipt Status"

Modifying Existing Statuses

Modifying a status allows options for the status to be edited, setting up email, text for different groups under that status, schedule automatic status changes. Once all changes have been completed to save them select "Save Receipt Status".

1. Select the pencil next to the status being modified.

2. Modify Existing Receipt Status appears with different tab options

Receipt Status Options Tab

These are the same options available when creating a status.

1. Select or de-select options for the status.

Communication Tab

This tab will allow an email/text be sent out to different parties when the item/package is set to the status. For this feature to work correctly the customer will need the option to send out emails/text, have the smtp email server setup and connected, and an email address and/or cell configured with the recipient.

1. Select from the drop down if creating an email or SMS text.

When a package is set to this status, Send an Email ⌄ The Recipient ⌄ **Add Rule**
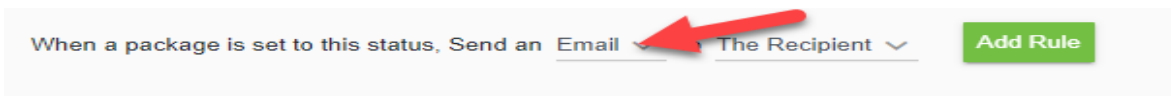
2. Select who the email/SMS text is being sent to. This can be the Recipients, the sender, a WTS/WTS-P user or other. Depending on the choice of email recipient there needs to be an email address/cell in the database for that person. If Other is chosen an email address will need to be entered after.

When a package is set to this status, Send an Email ⌄ to The Recipient ⌄ **Add Rule**
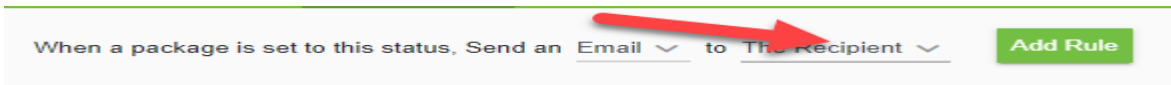
3. The next section will only be used if the customer utilizes Classification and is sending the email/text to Recipients. Also the customer wants to send an email/text out depending on the classification that is assigned to the Recipient. Select "Add Rule".

When a package is set to this status, Send an Email ⌄ to The Recipient ⌄ **Add Rule**
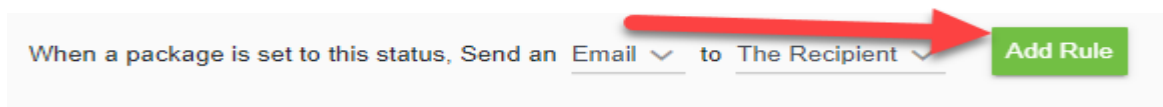
4. Select the pencil to configure the Email/SMS text that was created.

5. Enter the Title (subject line) and Body of the email. To help personalize the message to each Recipient use the "Insert Keyword" button on top. Drop down the options and once one has been chosen click "Insert Keyword" and that item will insert into the body of the email where the cursor last was. The Keyword will pull the information being requested in the email from the receive data. Example below.

Note: All options for the body are available and work. It is not recommended to add a picture to texts. Also if a recipient receives multiple packages/items in the system within the 5minutes of the first one, WTS/WTS-P will combine all packages into one email so they do not get multiple emails at the same time.
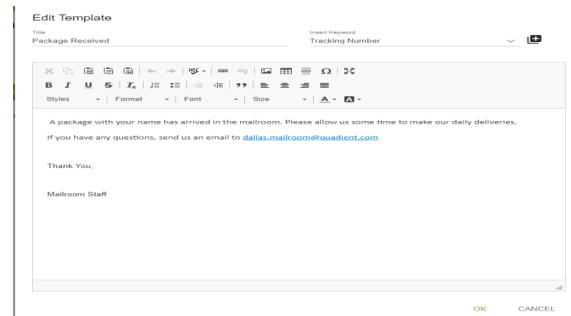
6. Select "OK" once the email/text is setup. Now anytime a package/item is set to this status the email/text will be sent.

7. To delete Click the "X" next to the Email/text created.

Schedule Tab

The schedule tab allows the system to set automatic status changes without a user setting the status. This feature is used a lot of times for second and/or final notices to the sender. If the package/item is delivered before the set time for the status to change the status will not change and no email will go out.
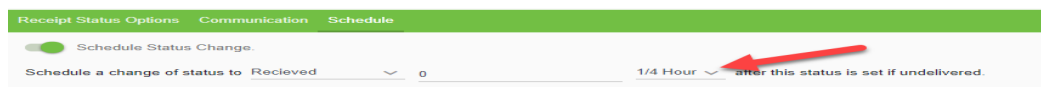
1. Select "Schedule Status Change."

2. Choose the status that the package is supposed to change to automatically after it reaches the current status. All statuses will show in this list.

3. Select the time frame of the status change using the drop down first.

4. Enter the multiplier of the time frame chosen.