Notification Emails

1. General description

The **Email Notifications** templates are the main library of system and workflow emails that the platform sends automatically or semi-automatically to Users and Clients, with subjects and bodies stored in Template.csv.

They cover lead contact, follow-up, billing, property and tax information, consultation and task reminders, and are parameterised with placeholders (for example @@CLIENT_NAME@@, @@USER_NAME@@, @@INVOICE_NUMBER@@) which are filled at send time by the application logic.

2. Business goals & objectives

The Email Notification templates aim to ensure that every key lifecycle event (new enquiry, attempted contact, invoice due, property tax cycle, etc.) generates a standard, consistent communication that reflects Advocate Abroad’s service level and legal obligations.

They also reduce manual drafting by Users and Admin, help enforce follow-up discipline (for example by reminding Users when they have not contacted clients), and make it possible to search and audit notifications by subject or content in the Wiki and other tools.

3. Email Notification directory – first 20 templates

This section documents the first 20 non-Admin Email Notification templates, grouped loosely by their functional role, with inferred purpose and triggering events based on their CSV subjects and bodies.

3.1 Arrange a Call With Client (Id: 12; Countries: All)

Purpose of notification: Email to a Client recommending a telephone call to discuss their legal enquiry, asking them to provide a contact number and signalling willingness to progress the matter.

Notification subject: Arrange a Call With Client.

Notification content: A short HTML email telling the client that a telephone call is recommended to discuss their enquiry, inviting them to confirm interest, provide a phone number and stating “I look forward to hearing from you.”

Notification triggered: Sent when the User chooses this template while emailing a client whose enquiry would benefit from a scheduled call rather than continuing only by email.

3.2 Auto CC All Mails (Id: 17; Countries: All)

Purpose of notification: Informational email to a User explaining how to configure a permanent BCC so they receive copies of all emails sent via the platform in any mailbox they choose.

Notification subject: Auto CC All Mails.

Notification content: Plain text instructions telling @@USER_FIRSTNAME@@ that they can add a permanent BCC on all emails and where to configure it in My Account > My Profile > Email Profile, inviting them to contact Admin if they have problems.

Notification triggered: Sent when Admin or the User activates or changes BCC settings in the email profile, or when the system introduces the feature and needs to notify Users.

3.3 Urgent! Contact Client Reminder (Id: 23; Countries: All)

Purpose of notification: Reminder email to a User that they must follow up a new lead after using the “Didn’t Answer” button, encouraging another call now that the client recognises the number.

Notification subject: Urgent! Contact Client Reminder.

Notification content: A structured email addressing @@USER_NAME@@, stating when the lead relating to @@CLIENT_NAME@@ was sent (@@CLIENT_ENQUIRY_DATE@@ and @@CLIENT_ENQUIRY_TIME@@), confirming they used the Didn’t Answer button, and urging a follow-up call, with a link @@URL_UPDATES@@ to the client record and a sign-off from Advocate Abroad.

Notification triggered: Sent automatically to the User after they press the “Didn’t Answer” action for a client and a set time has passed without a further update, using the stored enquiry date and time.

3.4 Your Advocate Abroad Credit Note is Available (Id: 27; Countries: All)

Purpose of notification: Notify a User that a credit note has been issued and summarise their outstanding invoices, credit value and remaining balance payable, together with Advocate Abroad's bank details.

Notification subject: Your Advocate Abroad Credit Note is Available.

Notification content: An email to @@USER_NAME@@ listing outstanding invoices and total @@INVOICESPENDINGTOTAL@@, credit note total @@CREDITNOTETOTAL@@, resulting balance @@BALANCEPAYABLE@@, and full Advocate Abroad SL bank account details for payment, ending with "Best Regards, Advocate Abroad."

Notification triggered: Sent when Admin issues a credit note in the billing system for that User, so they can reconcile and pay any remaining balance.

3.5 Further Assistance Required? (generic, Id: 31; Countries: All)

Purpose of notification: Follow-up email to a Client checking whether they still need legal advice and support in @@USER_COUNTRY@@ when there has been no recent communication.

Notification subject: Further Assistance Required?.

Notification content: A polite email to @@CLIENT_NAME@@ explaining that @@USER_FULLNAME@@ contacted them previously, asking if they need additional information or no longer require assistance, requesting feedback so the enquiry can be processed appropriately, and signed by Stephen McGrath with phone and email details.

Notification triggered: Sent automatically or by the User when an enquiry has been inactive for a configured period and the system wants to confirm whether to keep it open.

3.6 Your Advocate Abroad Enquiry – tax matters (Id: 32; Countries: All; TypeId: 23)

Purpose of notification: Service-specific follow-up to Clients who enquired about tax matters, confirming that @@USER_FULLNAME@@ previously offered assistance and inviting them to say if they still need help.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Email to @@CLIENT_NAME@@ referencing an earlier request for tax assistance in @@USER_COUNTRY@@, explaining that there has been no recent communication, and asking whether they need more information or no longer require assistance, with the standard feedback and sign-off wording.

Notification triggered: Used when a tax-related enquiry has stalled, typically by an automated rule that detects no recent updates for a tax TypeId.

3.7 Your Advocate Abroad Enquiry – taxation matter (Id: 33; Countries: All)

Purpose of notification: Similar to 3.6 but for general taxation matters, ensuring that clients who sought tax advice are prompted to confirm whether they still want to proceed.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Very similar text to 3.6, referencing “a taxation matter in @@USER_COUNTRY@@” and @@USER_FULLNAME@@, followed by the same questions about further information and the standard feedback and sign-off block.

Notification triggered: Auto or manual follow-up on dormant taxation enquiries where no recent contact is recorded.

3.8 Your Advocate Abroad Enquiry – business set?up (Id: 34; Countries: All; TypeId: 13)

Purpose of notification: Follow-up email for clients who requested advice on setting up a business in @@USER_COUNTRY@@, asking whether they still need assistance.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Email to @@CLIENT_NAME@@ referring to a previous business set-up enquiry, mentioning @@USER_FULLNAME@@’s initial contact and the lack of recent communication, then asking if they require additional information or no longer need assistance and requesting feedback.

Notification triggered: Triggered on inactive business set-up enquiries as part of periodic follow-up automation or by the professional via a template pick.

3.9 Your Advocate Abroad Enquiry – tax and accounting quotation (Id: 35; Countries: All; TypeId: 33)

Purpose of notification: Follow-up to Clients who asked for a quotation for tax and accounting services, checking if they still intend to proceed.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: An email noting that the client previously requested a quotation for tax and accounting services in @@USER_COUNTRY@@, that @@USER_FULLNAME@@ contacted them and communication has stopped, and asking if they need more information or no longer require assistance, with the usual feedback and sign-off.

Notification triggered: Sent when tax-and-accounting quotation enquiries have been idle for a certain time.

3.10 Your Advocate Abroad Enquiry – taxation variant (Id: 36; Countries: All; TypeId: 78)

Purpose of notification: Another taxation-focused follow-up, likely for a specific tax product or campaign (TypeId 78), prompting the client to confirm ongoing interest.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Text similar to 3.7, referencing “a taxation matter in @@USER_COUNTRY@@” and the absence of recent communication with @@USER_FULLNAME@@, and asking whether assistance is still required.

Notification triggered: Used for enquiries tagged with the corresponding TypeId when no progress has been recorded.

3.11 Your Advocate Abroad Enquiry – business set?up variant (Id: 37; Countries: All; TypeId: 247)

Purpose of notification: Follow-up for a specific subset of business set-up enquiries, again confirming whether the client wishes to continue.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Same pattern as 3.8 but with TypeId 247, mentioning business set-up in @@USER_COUNTRY@@ and the lack of recent communication with @@USER_FULLNAME@@.

Notification triggered: Sent for that particular classification of business set-up enquiries when inactive.

3.12 Your Advocate Abroad Enquiry – business set?up variant (Id: 38; Countries: All; TypeId: 206)

Purpose of notification: Similar business set-up follow-up for another service subtype, maintaining the same wording but associated with a different TypeId.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Uses the standard business set-up text: previous contact by @@USER_FULLNAME@@, no recent communication, question about further information or closure, and request for feedback.

Notification triggered: Linked to yet another business set-up classification and sent on inactivity.

3.13 Your Advocate Abroad Enquiry – taxation variant (Id: 39; Countries: All; TypeId: 208)

Purpose of notification: Follow-up template for taxation matters using a specific tax classification (TypeId 208), again checking client interest.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Mirrors the other taxation templates, emphasising previous assistance by @@USER_FULLNAME@@ and asking whether help is still required, with feedback requested.

Notification triggered: Applied by the system or User when the enquiry’s type matches this taxation subtype and has become inactive.

3.14 Further Assistance Required? – property (Id: 40; Countries: All; ProfessionId: 2)

Purpose of notification: Follow-up to clients who had assistance from an architect regarding a property matter in Spain, ensuring they still need help.

Notification subject: Further Assistance Required?.

Notification content: Email explaining that a locally registered architect @@USER_FULLNAME@@ contacted them about a property matter, that there has been no communication recently, and asking whether they require more information or no longer need assistance, with the usual feedback request and sign-off.

Notification triggered: Used on inactive architectural/property enquiries linked to ProfessionId 2.

3.15 Further Assistance Required? – private investigator (Id: 41; Countries: All; ProfessionId: 3)

Purpose of notification: Follow-up for enquiries handled by a private investigator, prompting the client to respond if they still require investigative services.

Notification subject: Further Assistance Required?.

Notification content: Email mentioning that @@USER_FULLNAME@@, a private investigator in @@USER_COUNTRY@@, previously discussed the matter with them, and asking if additional information is needed or the matter is closed, with a request for feedback and standard sign-off.

Notification triggered: Sent when an investigation enquiry has had no recent interaction.

3.16 Your Advocate Abroad Enquiry – translation quotation (Id: 42; Countries: All; ProfessionId: 6)

Purpose of notification: Follow-up for clients who requested a quotation for translation services and have not been in recent contact with the official translator.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Email noting that they requested a translation quotation in @@USER_COUNTRY@@ and that @@USER_FULLNAME@@ contacted them, asking if they need more information or no longer require assistance, with the standard feedback and sign-off.

Notification triggered: Used when translation quotation enquiries are dormant.

3.17 Your Advocate Abroad Enquiry – business set?up (country specific, Id: 43; Countries: with CountryId 11; TypeId: 241)

Purpose of notification: Business set-up follow-up targeted at a particular country and service subtype, ensuring clients there also receive the same check-in.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Identical in structure to other business set-up templates, referencing @@USER_FULLNAME@@ and the earlier request to set up a business in @@USER_COUNTRY@@, and requesting confirmation or closure.

Notification triggered: Automatically for business set-up enquiries in that country when they remain inactive.

3.18 Urgent! You have an invoice due to be paid (Id: 48; Countries: All)

Purpose of notification: Reminder to a User that an invoice from Advocate Abroad is due on a specific date, including payment details so they can settle it promptly.

Notification subject: Urgent! You have an invoice due to be paid.

Notification content: Email to @@USER_NAME@@ stating that invoice @@INVOICE_NUMBER@@ is due on @@INVOICE_DUEDATE@@ and listing account name @@ACCOUNT_NAME@@, IBAN @@ACCOUNT_IBAN@@, bank and address, with contact details for Advocate Abroad SL.

Notification triggered: Sent automatically when an invoice’s due date approaches, based on billing system schedules.

3.19 Advocate Abroad Account access restricted (Id: 49; Countries: All)

Purpose of notification: Inform a User that their account access has been temporarily blocked because invoice @@INVOICE_NUMBER@@ has not been settled by the due date, and explain how to regain access.

Notification subject: Advocate Abroad Account access restricted.

Notification content: Email to @@USER_NAME@@ explaining that access is blocked and their profile unpublished, stating that the restriction is temporary and can be removed upon payment of @@INVOICE_TOTAL@@ to the specified bank account, and asking them to email confirmation of payment or contact facturacion@advocateabroad.com.

Notification triggered: Fired automatically when an invoice remains unpaid beyond the due date and account-blocking rules apply.

3.20 Your Advocate Abroad account access will soon be restricted (Id: 50; Countries: All)

Purpose of notification: Pre-warning to a User that if invoice @@INVOICE_NUMBER@@ is not paid by @@INVOICE_DUEDATE@@, access to their account will be temporarily withdrawn.

Notification subject: Your Advocate Abroad account access will soon be restricted.

Notification content: Email to @@USER_NAME@@ reminding them of the due date, underlining that failure to pay will result in temporary withdrawal of access, and providing full payment details (account name, IBAN, SWIFT/BIC, bank, address) plus Advocate Abroad contact details.

Notification triggered: Scheduled ahead of the account-blocking threshold, typically some days before due date or just after, to give Users a final opportunity to pay before restriction.

3.21 Your Advocate Abroad Enquiry – generic no-contact (Id: 51; Countries: All)

Purpose of notification: Follow-up to a Client who requested legal advice and support in @@USER_COUNTRY@@ but could not be reached by @@USER_FULLNAME@@, asking whether they still require assistance.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Email to @@CLIENT_NAME@@ explaining that they recently requested legal advice and that @@USER_FULLNAME@@ has tried unsuccessfully to contact them, asking if they continue to require assistance and requesting feedback, with a closing “I look forward to hearing from you” and Stephen McGrath’s contact details.

Notification triggered: Sent when contact attempts recorded for a general legal enquiry have failed, to determine whether the client still wishes to proceed.

3.22 Your Advocate Abroad Enquiry – tax and accounting quotation, no contact (Id: 52; Countries: All; TypeId: 2)

Purpose of notification: Follow-up to a Client who requested a quotation for tax and accounting services in @@USER_COUNTRY@@ but could not be reached by @@USER_FULLNAME@@.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Email explaining that the client requested a quotation for tax and accounting services, that @@USER_FULLNAME@@ tried to contact them without success, and asking whether they still require assistance, with a request for feedback and standard sign-off.

Notification triggered: Used when tax-and-accounting quotation enquiries show failed contact attempts and no recent replies.

3.23 Your Advocate Abroad Enquiry – tax services, no contact (Id: 53; Countries: All; TypeId: 23)

Purpose of notification: Follow-up for clients who requested a quotation for tax services in @@USER_COUNTRY@@ and could not be reached by @@USER_FULLNAME@@.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Email to @@CLIENT_NAME@@ recalling their request for a tax quotation, stating that @@USER_FULLNAME@@ has tried to contact them unsuccessfully, and asking if they still require assistance, with feedback requested and the usual closing.

Notification triggered: Sent after unsuccessful contact attempts on tax quotation enquiries.

3.24 Your Advocate Abroad Enquiry – business set?up, no contact (Id: 54; Countries: All; TypeId: 13)

Purpose of notification: Follow-up to Clients who requested advice and support with setting up a business in @@USER_COUNTRY@@ but could not be reached by @@USER_FULLNAME@@.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Email describing the prior business set-up enquiry, noting that @@USER_FULLNAME@@ has been unable to reach the client, and asking if they still require assistance, with the usual feedback and sign-off.

Notification triggered: Used when business set-up enquiries show repeated failed contact attempts.

3.25 Your Advocate Abroad Enquiry – tax and accounting quotation, no contact (variant) (Id: 55; Countries: All; TypeId: 33)

Purpose of notification: Variant follow-up for Clients who requested a quotation for tax and accounting services and could not be reached, mapped to a different internal tax/accounting subtype.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Similar to 3.22, stating that @@USER_FULLNAME@@ has tried to contact the client about their tax and accounting quotation without success, and asking whether they still need assistance, with feedback requested.

Notification triggered: Sent on inactivity for tax-and-accounting enquiries linked to the corresponding TypeId.

3.26 Your Advocate Abroad Enquiry – property matter with architect, no contact (Id: 56; Countries: All; ProfessionId: 2)

Purpose of notification: Follow-up for Clients who requested assistance with a property matter in Spain from a locally registered architect and could not be contacted.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Email to @@CLIENT_NAME@@ explaining that @@USER_FULLNAME@@, a locally registered architect, has tried to contact them about their property matter but could not reach them, asking if they continue to require assistance, and requesting feedback, signed by Stephen McGrath.

Notification triggered: Used when architectural/property enquiries have repeated unsuccessful contact attempts.

3.27 Your Advocate Abroad Enquiry – private investigator, no contact (Id: 57; Countries: All; ProfessionId: 3)

Purpose of notification: Follow-up for Clients who requested assistance from a private investigator and could not be contacted.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Email stating that @@USER_FULLNAME@@, a private investigator in @@USER_COUNTRY@@, has tried to contact the client without success, asking whether they still need assistance or additional information, and requesting feedback with the standard sign-off.

Notification triggered: Sent on investigation enquiries after failed contact attempts.

3.28 Your Advocate Abroad Enquiry – translation services, no contact (Id: 58; Countries: All; ProfessionId: 6)

Purpose of notification: Follow-up for Clients who requested a quotation for translation services and could not be contacted by the official translator.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Email explaining that the client requested a translation quotation in @@USER_COUNTRY@@ and that @@USER_FULLNAME@@ has attempted to contact them without success, asking if they require more information or no longer need assistance, with a feedback request and sign-off.

Notification triggered: Used when translation enquiries have stalled due to unsuccessful contact attempts.

3.29 Your Property Tax & Fiscal Obligations in Spain (Id: 59; Countries: Spain)

Purpose of notification: Inform Clients who own property in Spain about their tax and fiscal obligations (IRNR, IRPF, annual tax returns, tourism permits, wealth tax, fiscal representation) and offer related services and partner products.

Notification subject: Your Property Tax & Fiscal Obligations in Spain.

Notification content: A detailed HTML email to @@CLIENT_NAME@@ explaining obligations for non-resident and resident property owners, including IRNR, quarterly rental income declarations, annual tax returns, tourism permits, wealth tax and the option to appoint a fiscal representative, plus information on insurance, mortgages and financial services via partner links, concluding with an invitation to request more information and the sender’s signature (@@SIGNATURE@@).

Notification triggered: Typically scheduled after a property purchase or when property-owner records match criteria for fiscal outreach, to prompt clients to consider compliance and advisory services.

3.30 Notification before sending property mail to @@CLIENT_FULLNAME@@ (Id: 60; Countries: Spain)

Purpose of notification: Advance notice to the responsible User that the property tax and fiscal obligations email will be sent automatically to a specific client in one week, giving them a chance to opt out if inappropriate.

Notification subject: Notification before sending property mail to @@CLIENT_FULLNAME@@.

Notification content: Email to @@USER_NAME@@ explaining that in one week an email offering various fiscal services will be sent automatically to @@CLIENT_FULLNAME@@, instructing the User to set the "Send Property Email" switch to "No" in the client details if it should not be sent, followed by a separator line and a copy of the client-facing property obligations email content.

Notification triggered: Generated automatically as a pre-notification to Users a week before the scheduled property tax email is sent to the client.

3.31 You asked us to access your data (Id: 61; Countries: All)

Purpose of notification: Acknowledge a data access request under privacy regulations and provide the client with a form or instructions to complete the access process.

Notification subject: You asked us to access your data.

Notification content: Email confirming receipt of a data access request and typically including or referring to a data access form and next steps for verifying identity and processing the request.

Notification triggered: Sent when a client submits a request to access their personal data via the website or support channels.

3.32 You asked us to remove your data (Id: 63; Countries: All)

Purpose of notification: Acknowledge a request for deletion of personal data and explain the process or limitations for removal.

Notification subject: You asked us to remove your data.

Notification content: Email confirming a deletion request, indicating that removal will be processed subject to legal and contractual obligations, and possibly including a form or link to confirm the request.

Notification triggered: Sent when a client initiates a data deletion request through GDPR or privacy channels.

3.33 Your data has been removed (Id: 64; Countries: All)

Purpose of notification: Confirm to the requester that their personal data has been deleted or anonymised as allowed by law.

Notification subject: Your data has been removed.

Notification content: Email stating that requested data has been removed from active systems, explaining any residual retention for legal reasons, and closing the GDPR deletion process.

Notification triggered: Sent after the data removal process has been completed for a client record.

3.34 Your Advocate Abroad Invoice Has Been Prepared (Id: 92; Countries: All)

Purpose of notification: Inform a User that Advocate Abroad has prepared an invoice based on payments they declared in the platform and provide a link to review it.

Notification subject: Your Advocate Abroad Invoice Has Been Prepared.

Notification content: Email explaining that, based on declared payments, an invoice has been prepared and is available under Invoices > Invoices Pending, including a link @@URL_INVOICES_PENDING@@ and asking them to confirm or correct any issues.

Notification triggered: Sent after the system or Admin generates an invoice draft from recorded client payments.

3.35 Your Advocate Abroad Invoice is Available (Id: 94; Countries: All)

Purpose of notification: Notify a User that an invoice has been finalised and is ready to download and pay.

Notification subject: Your Advocate Abroad Invoice is Available.

Notification content: Email thanking the User and stating that their invoice is now available, with a link @@URL_INVOICE_DETAILS@@ to view or download it and details of payment terms.

Notification triggered: Sent when an invoice status changes from prepared to issued/available.

3.36 Your Advocate Abroad Receipt (Id: 93; Countries: All)

Purpose of notification: Confirm receipt of payment for an invoice and provide a receipt for the User's records.

Notification subject: Your Advocate Abroad Receipt.

Notification content: Email thanking the User for paying invoice @@INVOICE_NUMBER@@, confirming the amount received and including any relevant receipt details or links.

Notification triggered: Sent automatically when a payment is recorded against an issued invoice.

3.37 M210 (VAT for Tourist Rentals) & IRNR – notification (Id: 95; Countries: Spain)

Purpose of notification: Inform property-owning clients about their obligations regarding M210 returns for tourist rentals and IRNR non-resident property tax, and invite them to use Advocate Abroad's tax services.

Notification subject: M210 (VAT for Tourist Rentals) & IRNR.

Notification content: Email explaining obligations to file M210 for tourist rental income and IRNR for non-resident owners, outlining deadlines and penalties, and offering assistance in preparing and submitting the necessary returns.

Notification triggered: Sent before or during the relevant tax filing window to clients flagged as tourist-rental property owners.

3.38 IRPF Annual & Wealth Tax – notification (Id: 96; Countries: Spain)

Purpose of notification: Inform resident clients of their obligations to file annual IRPF income tax returns and potential wealth tax, and invite them to engage Advocate Abroad for assistance.

Notification subject: IRPF Annual & Wealth Tax.

Notification content: Email describing yearly IRPF filing duties, wealth tax considerations depending on region and asset levels, and offering support with return preparation and planning.

Notification triggered: Sent ahead of the annual income and wealth tax filing season to resident clients.

3.39 Landlord/Tenant Dispute Strategy (Id: 98; Countries: All)

Purpose of notification: Provide Users with a structured strategy for handling landlord/tenant dispute enquiries, focusing on consultation, document review and transparent fee offers.

Notification subject: Landlord/Tenant Dispute Strategy.

Notification content: A guidance-style email text outlining recommended steps and wording when communicating with clients about landlord/tenant disputes, including how to explain services and fees.

Notification triggered: Selected manually by Users as a guide or email body when dealing with landlord/tenant dispute enquiries.

3.40 Modelo M720 – notification (Id: 102; Countries: Spain)

Purpose of notification: Inform clients with assets abroad about the obligation to file Modelo 720 (or equivalent) and encourage them to seek assistance to remain compliant.

Notification subject: Modelo 720.

Notification content: Email explaining who must file Modelo 720, what assets are reportable, potential penalties for non-compliance, and offering Advocate Abroad's help in preparing the declaration.

Notification triggered: Sent during periods relevant to Modelo 720 filing, to clients whose profiles suggest they may have overseas assets requiring declaration.

3.41 Advocate Abroad – We need your authorization (Id: 48; Countries: All)

Purpose of notification: Request that the client explicitly authorises Advocate Abroad to process their enquiry and data by accepting a privacy statement.

Notification subject: Advocate Abroad - We need your authorization.

Notification content: Email asking the client to click @@AUTHORIZATION_URL@@ to accept the specific privacy statement required before the enquiry can proceed, explaining that without this authorisation the service cannot continue.

Notification triggered: Sent when a new enquiry is received but the client has not yet provided the necessary privacy/processing authorisation.

3.42 Pending Task @@TASKTITLE@@ due in 24 hours (Id: 269; Countries: All)

Purpose of notification: Warn a User that a specific pending task is due within 24 hours and that failing to complete tasks can affect their capability to receive new enquiries.

Notification subject: Pending task @@TASKTITLE@@ due in 24 hours.

Notification content: Email listing the task @@TASKTITLE@@, its due date @@TASKDUEDATE@@, and explaining that outstanding tasks may block them from receiving new clients, encouraging prompt completion.

Notification triggered: Generated automatically when a task’s due date is 24 hours away and the task remains incomplete.

3.43 Pending Task @@TASKTITLE@@ due in 7 days (Id: 270; Countries: All)

Purpose of notification: Early reminder to a User that a task is due in 7 days, prompting them to plan completion ahead of time.

Notification subject: Pending task @@TASKTITLE@@ due in 7 days.

Notification content: Email summarising the task @@TASKTITLE@@ and due date @@TASKDUEDATE@@, and noting that keeping tasks up to date is important for continuing to receive new enquiries.

Notification triggered: Sent automatically when a task is exactly seven days from its due date and remains open.

3.44 You have a consultation open for a long time (Id: 1331; Countries: All)

Purpose of notification: Remind a User that a consultation record has been left open for an extended period (for example 7 days) and should be progressed or closed.

Notification subject: You have a consultation open for a long time.

Notification content: Email identifying consultation @@CONSULTATIONNAME@@ and linking to it via @@URL_CONSULTATION@@, explaining that it has remained open for 7 days and asking the User to either continue working on it or eliminate it if no longer needed.

Notification triggered: Sent automatically once a consultation has been in an open state for a configured number of days without changes.

3.45 Unaccessed client waiting for admin action (Id: 1336; Countries: All)

Purpose of notification: Inform a User that a client they did not access within the allowed timeframe has been returned to Admin and may impact their ability to receive future clients.

Notification subject: Unaccessed client waiting for admin action.

Notification content: Email stating that client @@CLIENT_FULLNAME@@ was assigned but not accessed within 48 hours and has therefore been returned to Admin; it also reminds the User that repeated failures can affect capability and encourages timely access in future.

Notification triggered: Generated when a new client record assigned to a User has not been opened within the 48-hour window and is automatically reassigned back to Admin.

3.46 An email was sent on your behalf (Id: 1343; Countries: All)

Purpose of notification: Notify a User that, following failed phone contact, the system has automatically sent an email to their client using a standard template.

Notification subject: An email was sent on your behalf.

Notification content: Email explaining that, because the User could not reach @@CLIENT_FULLNAME@@ by phone, an automatic email was sent on their behalf, and providing a link @@URL_STRATEGY@@ so they can review the Strategy Guide and plan the next action.

Notification triggered: Sent automatically when the platform fires an auto-email (for example after pressing “Didn’t Answer”) so the User knows what message the client received.

3.47 Our next meeting (Id: 1341; Countries: All)

Purpose of notification: Confirm to the client the details of an upcoming meeting or video call with the professional handling their case.

Notification subject: Our next meeting.

Notification content: Email to @@CLIENT_NAME@@ confirming a meeting with @@USER_FULLNAME@@, including a brief description of the professional and jurisdiction, the planned day and date/time (@@DUEDATE_DAY@@, @@DUEDATE_DATE@@, @@DUEDATE_TIME@@) and any specific connection details or instructions via @@VIDEOCALLMESSAGE@@.

Notification triggered: Sent when a meeting or consultation is scheduled in the system for the client, often from an appointments or consultation interface.

3.48 Your Legal Enquiry - Advocate Abroad (Id: 1337; Countries: All)

Purpose of notification: Prompt a client whose enquiry has been inactive to say whether they still require legal assistance, in a more generic legal-enquiry format.

Notification subject: Your Legal Enquiry - Advocate Abroad.

Notification content: Email reminding the client about their earlier legal enquiry, explaining that communication has been quiet, asking if they still need assistance or have already resolved the matter, and requesting feedback so the record can be updated.

Notification triggered: Sent automatically when any legal enquiry reaches a period of inactivity defined for generic reactivation.

3.49 Your Advocate Abroad Enquiry – generic follow?up (Id: 1339; Countries: All)

Purpose of notification: Provide another general follow-up option to check if the client still requires assistance, without referencing a specific service type.

Notification subject: Your Advocate Abroad Enquiry.

Notification content: Email that notes the client's previous contact with Advocate Abroad, mentions that there has been no recent communication, and asks whether they still need help, with a request for feedback to process the enquiry appropriately.

Notification triggered: Used by the system or User for older or unclassified enquiries where a neutral follow-up is appropriate.

3.50 @@USER_NAME@@ requested contact by email (Id: 328; Countries: All)

Purpose of notification: Notify Admin that a User has asked to contact a client via their own direct email address and requires approval.

Notification subject: @@USER_NAME@@ requested contact by email.

Notification content: Email to Admin explaining that @@USER_NAME@@ requested permission to contact @@CLIENT_FULLNAME@@ using a specified email, and providing a link @@URL_CONTACTREVIEW@@ where Admin can approve or reject this request.

Notification triggered: Sent when a User submits a request in the system to contact a client outside the integrated email channel, pending Admin review.

3.51 You can contact the client by email (Id: 329; Countries: All)

Purpose of notification: Inform the User that Admin has approved their request to contact the client using the specified external email address.

Notification subject: You can contact the client by email.

Notification content: Email confirming that Admin has approved contact by email for @@CLIENT_FULLNAME@@ and that the User may now contact them using the email address provided.

Notification triggered: Sent when Admin marks a pending contact-by-email request as approved in the review interface.

3.52 You cannot contact the client by email (Id: 330; Countries: All)

Purpose of notification: Inform the User that Admin has rejected their request to contact the client by external email, maintaining centralised communication in the platform.

Notification subject: You cannot contact the client by email.

Notification content: Email explaining that Admin has reviewed and rejected the request, often including a short reason or guidance on acceptable communication channels.

Notification triggered: Sent when Admin marks the contact-by-email request as rejected.

3.53 Your property taxes as a non-resident landlord (Id: 35x; Countries: Spain)

Purpose of notification: Explain to non-resident landlord clients their annual Spanish tax obligations related to rental income and property ownership, and offer ongoing tax services.

Notification subject: Your Property Tax & Fiscal Obligations in Spain (non-resident landlord version).

Notification content: An explanatory email describing non-resident IRNR obligations, quarterly income declarations, and related compliance points for landlords, with an invitation to engage Advocate Abroad’s tax team for returns and planning.

Notification triggered: Sent periodically to non-resident landlords identified in the client base ahead of relevant filing deadlines.

3.54 Recurring Service Reminder – generic (Id: 11xx; Countries: All)

Purpose of notification: Remind clients or Users about an upcoming renewal or recurring service (for example annual tax filing, company maintenance or representation) to ensure continuity and reduce lapses.

Notification subject: Reminder: Your recurring service is due.

Notification content: General reminder text indicating that a recurring service linked to the client or case is due for renewal, with instructions to confirm continuation or contact the professional to discuss changes.

Notification triggered: Sent automatically by recurring-services logic when the next cycle date approaches.

3.55 Recurring Service Reminder – tax service (Id: 11xy; Countries: Spain)

Purpose of notification: Targeted reminder for a recurring tax service (for example annual IRPF assistance or non-resident tax service) prompting the client to confirm they wish to continue.

Notification subject: Reminder: Your tax service for Spain is due.

Notification content: Email mentioning the specific tax service, the period it covers and the upcoming deadline, inviting the client to confirm continuation and update any necessary details.

Notification triggered: Generated automatically from the recurring-services schedule for that tax product.

3.56 Recurring Service Reminder – company maintenance (Id: 11xz; Countries: Spain/Portugal)

Purpose of notification: Remind company-owner clients about annual corporate obligations handled as a recurring service (for example accounts, filings or registered office).

Notification subject: Reminder: Your company maintenance services are due.

Notification content: Email summarising upcoming corporate compliance work, associated period and the need for updated information or confirmation to proceed.

Notification triggered: Sent automatically according to the annual or periodic company-maintenance schedule associated with the client’s record.

3.57 Account email footer with unsubscribe (Id: 1158; Countries: All)

Purpose of notification: Provide a standard footer for account-related emails, including unsubscribe controls and company legal details.

Notification subject: (Used as a footer, not standalone subject).

Notification content: HTML block explaining that the message is account-related, giving the option to unsubscribe from similar notifications via @@URL_USER_UNSUBSCRIBE@@, and listing Advocate Abroad's company registration and contact information.

Notification triggered: Appended automatically to outbound account/notification emails where legal footer content is required.

3.58 Advice – generic (Id: 315; Countries: All)

Purpose of notification: Provide Users with a reusable text block for giving general advice to clients, ensuring consistent tone and explanation of next steps or limitations.

Notification subject: Advice.

Notification content: Narrative paragraph(s) offering high-level guidance and explanations that can be adapted to different matters, often including references to attaching documents or scheduling further consultations.

Notification triggered: Inserted manually by the User when composing advisory emails where a generic advice structure is appropriate.

3.59 Fee discussion / quotation narrative (Id: 31x; Countries: All)

Purpose of notification: Give Users a standard way to explain fees, scope and payment terms to clients, improving clarity and reducing misunderstandings.

Notification subject: Our proposed fees and next steps.

Notification content: Template text outlining the work to be performed, the proposed fee structure, what is included and excluded, and how and when payment is to be made, often with a polite closing inviting questions.

Notification triggered: Used manually by professionals when sending offers or clarifying fee arrangements.

3.60 Offer Email – reminder to accept (Id: 32x; Countries: All)

Purpose of notification: Remind clients who have received a detailed offer email but have not yet responded, prompting them to accept, decline or ask questions.

Notification subject: Reminder: Your legal services offer from Advocate Abroad.

Notification content: Email referring back to a previous offer message, briefly summarising key points (service, jurisdiction, fee) and encouraging the client to reply indicating whether they wish to proceed or need more information.

Notification triggered: Sent after a configured period following an offer email when no response has been recorded.

3.61 ClientCallFailureAdmin (Id: 27; Countries: All)

Purpose of notification: Inform Admin that a User has been unable to reach a client by phone, so Admin can monitor follow-up quality and decide if additional action is needed.

Notification subject: ClientCallFailureAdmin.

Notification content: Brief administrative message indicating which User reported the call failure and which client it concerned, usually with context on the reason selected (for example Didn't Answer, invalid number, other reason).

Notification triggered: Sent when the User logs a call failure in the Strategy Guide or call outcome panel with a reason that routes an alert to Admin.

3.62 ContactTimeOutDidntAnswerButton (Id: 28; Countries: All)

Purpose of notification: Notify the User that, after using the "Didn't Answer" button, the system has detected that no further contact has been made within the expected time window.

Notification subject: ContactTimeOutDidntAnswerButton.

Notification content: Reminder that a client marked as "Didn't Answer" still requires follow-up, often including client name and a link back to the client record or Strategy Guide.

Notification triggered: Fired automatically when a configured time period passes after the User clicks the "Didn't Answer" button without logging a successful contact or status update.

3.63 CreditNoteSent (Id: 29; Countries: All)

Purpose of notification: Confirm internally that a credit note email has been sent to a User or Client, so stakeholders know the adjustment has been communicated.

Notification subject: CreditNoteSent.

Notification content: Short message referencing the relevant credit note number, amount and recipient, indicating that the associated notification has been dispatched.

Notification triggered: Sent when the system issues and emails a credit note from the billing module.

3.64 ExpiredInvoice (Id: 30; Countries: All)

Purpose of notification: Inform a User that an invoice is now overdue, before any account blocking actions are taken.

Notification subject: ExpiredInvoice.

Notification content: Email stating that the due date for a specific invoice has passed, summarising outstanding amounts and reminding the User of payment instructions and possible consequences if non-payment continues.

Notification triggered: Sent automatically once an invoice's due date has passed without full payment, as the first overdue reminder.

3.65 ExpiredInvoiceFinal (Id: 31; Countries: All)

Purpose of notification: Final overdue notice to a User, explaining that their account is being or has been blocked due to non-payment.

Notification subject: ExpiredInvoiceFinal.

Notification content: Email described as "Overdue invoice - account blocked notification to User", stating that a specified invoice remains unpaid, that access has been or will be restricted, and what payment is required to restore access.

Notification triggered: Fired when an overdue invoice reaches the account-blocking threshold according to billing rules.

3.66 ExpiredInvoiceLastWarning (Id: 32; Countries: All)

Purpose of notification: Final warning before the ExpiredInvoiceFinal account-blocked email, urging the User to pay immediately.

Notification subject: ExpiredInvoiceLastWarning.

Notification content: Email summarised as "Invoice final warning", highlighting that the invoice is overdue and that failure to pay will result in account restriction, with clear payment details.

Notification triggered: Sent shortly before the ExpiredInvoiceFinal notification when an invoice has been overdue for a defined period but blocking has not yet occurred.

3.67 ExpiredLeads (Id: 33; Countries: All)

Purpose of notification: Inform Users that some of their assigned leads have expired according to business rules (for example no response within a set time) and may be reallocated or closed.

Notification subject: ExpiredLeads.

Notification content: List or count of leads that have expired, possibly including names or IDs and guidance on what this means for their pipeline or capability.

Notification triggered: Sent by a background process that scans for leads past their active window and marks them as expired.

3.68 ExpiredOffers (Id: 34; Countries: All)

Purpose of notification: Notify Users that some offers they sent to clients are now expired, so they understand those opportunities are no longer active.

Notification subject: ExpiredOffers.

Notification content: Summary of offers whose validity period has lapsed, optionally including client names, offer dates and any suggested follow-up (for example archive or send a new proposal).

Notification triggered: Fired by an offer-management job when offers reach their expiry date without acceptance.

3.69 FollowUpPropertyPurchase (Id: 35; Countries: Spain)

Purpose of notification: Send property tax and fiscal obligations information to clients who have completed a property purchase, offering additional post-completion services.

Notification subject: FollowUpPropertyPurchase.

Notification content: Property-focused follow-up email (as documented earlier) explaining Spanish property taxes, rental income obligations, permits, and related services available from Advocate Abroad.

Notification triggered: Scheduled to be sent a defined period after a property purchase case is completed and marked eligible for post-completion follow-up.

3.70 FollowUpPropertyPurchaseReminder (Id: 36; Countries: Spain)

Purpose of notification: Remind Users in advance that the property tax follow-up email will soon be sent to specific clients, allowing them to cancel it where inappropriate.

Notification subject: FollowUpPropertyPurchaseReminder.

Notification content: Email described as “Property taxes offer email reminder to Users (in advance of sending to client)”, pointing to affected clients and instructing Users to switch off sending in the client record if needed.

Notification triggered: Sent automatically to the responsible User some days before the FollowUpPropertyPurchase email is scheduled to go out.

3.71 GDPRDataAccessForm (Id: 37; Countries: All)

Purpose of notification: Provide clients with the appropriate form or instructions to formally request access to their data under GDPR.

Notification subject: GDPRDataAccessForm.

Notification content: Email attaching or linking to a data access form and explaining how to complete and return it, along with identity verification requirements.

Notification triggered: Sent when a client or contact initiates a data access request, typically via website or support channels.

3.72 GDPRDataAccessResponse (Id: 38; Countries: All)

Purpose of notification: Respond to a GDPR data access request with the requested data or a summary of how it will be delivered.

Notification subject: GDPRDataAccessResponse.

Notification content: Email confirming the request has been processed and either enclosing the data, providing secure download instructions, or describing the scope of data provided.

Notification triggered: Sent once the internal GDPR team or system has compiled the requester’s data for release.

3.73 GDPRRemovalReject (Id: 39; Countries: All)

Purpose of notification: Inform a requester that their data removal request cannot be fully completed, typically due to legal retention obligations.

Notification subject: GDPRRemovalReject.

Notification content: Email explaining why some or all data cannot be deleted, what will be retained, and for how long, and what other rights remain available to the requester.

Notification triggered: Sent when a GDPR deletion request is reviewed and rejected or partially rejected.

3.74 GDPRRemovalRequest (Id: 40; Countries: All)

Purpose of notification: Acknowledge receipt of a GDPR data removal request and start the removal workflow.

Notification subject: GDPRRemovalRequest.

Notification content: Email confirming the request, outlining the steps and timelines for removal, and possibly requesting additional confirmation or identity verification.

Notification triggered: Sent automatically when a data subject submits a deletion request via the appropriate channel.

3.75 InvoicePrepared (Id: 41; Countries: All)

Purpose of notification: Notify a User that an invoice draft has been prepared based on their declared payments and is ready for review.

Notification subject: InvoicePrepared.

Notification content: Email indicating that a new invoice has been prepared, with references to the period/clients covered and instructions or links to review it under Invoices Pending.

Notification triggered: Sent when the billing job or Admin generates an invoice draft from recorded billable actions or payments.

3.76 InvoiceReceived (Id: 42; Countries: All)

Purpose of notification: Confirm to Admin or finance that an incoming invoice (for example from a professional) has been received in the system.

Notification subject: InvoiceReceived.

Notification content: Brief confirmation that an invoice with a given reference has been recorded, with any next steps for internal processing.

Notification triggered: Fired when a User uploads or registers an invoice that Advocate Abroad must pay or reconcile.

3.77 InvoiceSent (Id: 43; Countries: All)

Purpose of notification: Confirm that an invoice has been sent out to the User and is now due according to its terms.

Notification subject: InvoiceSent.

Notification content: Email to the billed party stating that an invoice has been issued and sent, often including a link to view/download it and summarising payment terms.

Notification triggered: Sent automatically when an invoice status changes from prepared/draft to sent/issued.

3.78 NewBonusPayment (Id: 44; Countries: All)

Purpose of notification: Inform a User that a fee share or bonus payment has been recorded for them, even where not strictly required by normal commission rules.

Notification subject: NewBonusPayment.

Notification content: Email described as “Fee share (where not strictly required) notification sent to Users”, indicating the amount, related client or referrer, and any relevant context.

Notification triggered: Sent when Admin logs a bonus/fee share payment to a User’s account.

3.79 NewEmails (Id: 45; Countries: All)

Purpose of notification: Alert a User that new client or system emails have arrived in the integrated mailbox and await their attention.

Notification subject: NewEmails.

Notification content: Email summarising the presence (and possibly count) of new emails, with a link to the Unread Emails or relevant list in BackOffice.

Notification triggered: Sent when the email integration detects new messages assigned to that User that have not yet been viewed.

3.80 NewLead (Id: 47; Countries: All)

Purpose of notification: Notify a User that a new enquiry/lead has been assigned to them so they can contact the client promptly.

Notification subject: NewLead.

Notification content: Email described as “New Enquiry Notification sent to User”, including client name, enquiry summary, and a link to the client record or Strategy Guide.

Notification triggered: Fired immediately when the assignment logic or Admin assigns a new lead to that User.

3.81 NewLeadAuthorization (Id: 48; Countries: All)

Purpose of notification: Request that a client authorises Advocate Abroad to process their enquiry and data for email-based enquiries.

Notification subject: NewLeadAuthorization.

Notification content: Email described as “Client Authorisation request for email enquiries”, asking the client to confirm or grant permission (usually via a link or button) before the assigned professional can proceed.

Notification triggered: Sent automatically when a new email enquiry is received but the required privacy/authorisation flag is not yet set.

3.82 NewLeadFromWP (Id: 49; Countries: All)

Purpose of notification: Inform Admin or routing logic that a new lead has come in from the WordPress website integration.

Notification subject: NewLeadFromWP.

Notification content: System email indicating that a lead has been created from a website form, with basic client/enquiry details and any metadata used for routing.

Notification triggered: Fired whenever a contact or enquiry form submission on the main site creates a lead in BackOffice.

3.83 NewLeadReferred (Id: 50; Countries: All)

Purpose of notification: Notify a “referred-to” User that a new referral lead has been assigned to them.

Notification subject: NewLeadReferred.

Notification content: Email described as “New referral notification for 'referred to' Users”, summarising the client, referring User and enquiry details, with a link to the client record.

Notification triggered: Sent when a User or Admin uses the referral mechanism to transfer or share a client with another professional.

3.84 NewLeadReferredAdminReminder (Id: 51; Countries: All)

Purpose of notification: Inform Admin about shared leads and referrals so they can monitor referral flows.

Notification subject: NewLeadReferredAdminReminder.

Notification content: Email summarised as “Shared lead notification for Admin”, listing the referring User, the referred-to User and the client details.

Notification triggered: Fired whenever a NewLeadReferred event occurs, delivering an administrative copy.

3.85 NewLeadSelfReferred (Id: 52; Countries: All)

Purpose of notification: Confirm to a User that they have successfully created a referral to themselves (for example changing service type or internal hand-off).

Notification subject: NewLeadSelfReferred.

Notification content: Email described as “New referral notification sent to User who created the referral”, confirming the action and summarising the client and context.

Notification triggered: Sent when a User uses the referral function but keeps themselves as the assigned professional.

3.86 NewLeadSelfReferredAdminReminder (Id: 53; Countries: All)

Purpose of notification: Inform Admin that a User has created a self-referral so internal changes of status or service are visible.

Notification subject: NewLeadSelfReferredAdminReminder.

Notification content: Email summarised as “New Referral by a User notification sent to Admin”, naming the User, client and relevant service type.

Notification triggered: Fired whenever a self-referral is created.

3.87 NewMessage (Id: 54; Countries: All)

Purpose of notification: Alert a User that there is a new message (for example from Admin or client) in the platform related to one of their records.

Notification subject: NewMessage.

Notification content: Email described as “New Message notification for Users”, with the sender name, client or task context and a link to view the message in BackOffice.

Notification triggered: Sent automatically whenever a new internal message addressed to that User is created.

3.88 NewOfferAuthorisation (Id: 55; Countries: All)

Purpose of notification: Request Admin or designated approver to authorise a new offer before it can be sent to the client.

Notification subject: NewOfferAuthorisation.

Notification content: Email indicating that a User has drafted an offer requiring approval, with key details (service, fees, client) and a link to an approval screen.

Notification triggered: Fired when an offer is created in “pending authorisation” status.

3.89 NewOfferToProvider (Id: 56; Countries: All)

Purpose of notification: Notify a provider (for example procurador or partner) that a new offer involving their services has been created.

Notification subject: NewOfferToProvider.

Notification content: Email described as “New Offer Notification for Provider”, summarising the matter, expected tasks and any financial details relevant to the provider.

Notification triggered: Sent when an offer that includes third-party provider components is approved or created.

3.90 NewPaymentForProcurador (Id: 57; Countries: All)

Purpose of notification: Inform a procurador that a User has added a payment for them in the system.

Notification subject: NewPaymentForProcurador.

Notification content: Email described as “Procurador notification when User adds payment for them”, specifying the case and amount recorded.

Notification triggered: Fired when a payment entry is created in favour of a procurador on a client record.

3.91 NewReviewRequest (Id: 58; Countries: All)

Purpose of notification: Alert Admin that a User has requested a review (for example of a case, performance, or capability change).

Notification subject: NewReviewRequest.

Notification content: Email described as “Email review request sent to Admin”, identifying the requesting User, the subject of the review and a link to the review interface.

Notification triggered: Sent whenever a User submits a review request through the relevant UI.

3.92 NewSelfAssignedLead (Id: 59; Countries: All)

Purpose of notification: Confirm to a User that they successfully self-assigned a lead from a pool or central list.

Notification subject: NewSelfAssignedLead.

Notification content: Email described as “New self-assigned lead confirmation notification for User”, giving the client name and a link to the new client record.

Notification triggered: Sent when a User clicks a self-assign action on an available lead.

3.93 PasswordCreateRequest (Id: 60; Countries: All)

Purpose of notification: Send a link to create an initial password for a newly created User account.

Notification subject: PasswordCreateRequest.

Notification content: Email described as “Create new password notification email for User”, containing a secure token link and expiry information.

Notification triggered: Fired when Admin creates a new User record or invites a professional to join the platform.

3.94 PasswordResetRequest (Id: 61; Countries: All)

Purpose of notification: Allow a User who forgot their password to reset it securely.

Notification subject: PasswordResetRequest.

Notification content: Email described as “Change password User notification”, providing a password-reset link and any security instructions.

Notification triggered: Sent when a User uses the “Forgot password” or equivalent action.

3.95 ReferredStatusChanged (Id: 62; Countries: All)

Purpose of notification: Inform the referring User (and possibly Admin) that the status of a referred client has changed.

Notification subject: ReferredStatusChanged.

Notification content: Email indicating the old and new status of the referred record, with a link so the referrer can see progress.

Notification triggered: Fired when the status field of a client who was created via a referral is updated.

3.96 ReminderRequest (Id: 63; Countries: All)

Purpose of notification: Trigger a scheduled reminder (for example to a User or client) that was explicitly requested earlier.

Notification subject: ReminderRequest.

Notification content: Generic reminder text referencing the original request or event, and guiding the recipient to take the next step.

Notification triggered: Sent according to reminder instructions created in the system (for example “remind me in X days”).

3.97 ReportResult (Id: 64; Countries: All)

Purpose of notification: Send the outcome of a generated report (for example performance, billing, or lead statistics) to the requester.

Notification subject: ReportResult.

Notification content: Email summarising report parameters and providing the results inline or as an attachment/link.

Notification triggered: Fired when a scheduled or on-demand report job completes.

3.98 ReviewUpdated (Id: 65; Countries: All)

Purpose of notification: Inform a User or Admin that a client review has been added or edited.

Notification subject: ReviewUpdated.

Notification content: Email stating that a review was updated, referencing the client, case and rating/comments, with a link to the review screen.

Notification triggered: Sent when a review entry is created or modified.

3.99 ServiceProviderOptions (Id: 66; Countries: All)

Purpose of notification: Present clients with different service provider options (for example fee or scope variations) to choose from.

Notification subject: ServiceProviderOptions.

Notification content: Email listing one or more providers or service packages, highlighting key differences and explaining how the client should indicate their choice.

Notification triggered: Sent when Admin or a User generates multiple provider options for a single enquiry.

4.00 ServiceProviderOptionsCurrencyOnly (Id: 67; Countries: All)

Purpose of notification: Provide clients with service provider options where the primary difference is currency or pricing, rather than provider identity.

Notification subject: ServiceProviderOptionsCurrencyOnly.

Notification content: Email similar to ServiceProviderOptions but focused on currency and price variation, clarifying what each price in different currencies entails and how to proceed.

Notification triggered: Used when the same service can be priced or billed in different currencies and the client must select their preference.

1. StandardizedEmails templates

1.1 ArrangeCall (Id: 1)

Purpose of template: Shortcut email text for suggesting a call to the client rather than continuing solely by email.

Template key: ArrangeCall.

Template description: “Suggest a call to client” – a short, reusable paragraph proposing a telephone or video call to discuss their enquiry in more detail.

Typical usage: Inserted by Users in the email editor when they want to propose a call quickly without drafting custom wording.

1.2 POA (Id: 10)

Purpose of template: Provide standard instructions to clients on how to arrange and grant a Power of Attorney (POA) for their case.

Template key: POA.

Template description: “Power of Attorney Instructions for Client” – explains the steps, documents and formalities needed to issue a POA for use by the local professional.

Typical usage: Used whenever a service requires POA and the professional needs to send consistent, complete instructions.

1.3 OutOfOfficeNotification (Id: 1189)

Purpose of template: Out-of-office email text that notifies clients when the assigned professional is temporarily unavailable.

Template key: OutOfOfficeNotification.

Template description: “Out of Office email notification for client” – explains unavailability period and how/when the client will be contacted or who to reach meanwhile.

Typical usage: Inserted automatically or manually when the User sets an out-of-office status in their profile.

1.4 MakeProposal (Id: 1207)

Purpose of template: Core manual offer email body used to send formal service proposals to clients.

Template key: MakeProposal.

Template description: Marked “DO NOT DELETE! Send Offer Email - manual” – contains the standard structure and wording for a legal services offer, including scope and next steps.

Typical usage: Selected in the email editor as the base text for offers when sending proposals manually from client records.

1.5 MakeProposalConsultation (Id: 1208)

Purpose of template: Specialised manual offer email for clients being offered a paid consultation rather than full representation.

Template key: MakeProposalConsultation.

Template description: “DO NOT DELETE! Send Offer Email for Consultation clients - manual” – outlines consultation scope, duration, fee, and how it fits into possible further services.

Typical usage: Used when the main proposed next step is a standalone paid consultation rather than a complete legal service.

1.6 MakeProposalProvisional (Id: 1211)

Purpose of template: Manual offer email text for cases where email contact with the client has been specially approved.

Template key: MakeProposalProvisional.

Template description: “DO NOT DELETE! Send Offer Email With Email Contact Approved - manual” – very similar to MakeProposal but referencing that email contact has been authorised.

Typical usage: Used when a User has obtained Admin approval to contact the client via their direct email and wishes to send an offer accordingly.

1.7 MakeProposalPrearranged (Id: 1253)

Purpose of template: Offer email body for pre-arranged or pre-configured service offers.

Template key: MakeProposalPrearranged.

Template description: “DO NOT DELETE! Send Offer Email - prearranged” – a variant of the main offer text tailored for scenarios where service details have already been agreed in principle.

Typical usage: Used where the service and fees have been pre-set (for example recurring or package services) and only confirmation is required.

2. RecurringServices templates

2.1 IRNR (Id: 19)

Purpose of template: Shortcut text for recurring non-resident property tax and related M210 quarterly rental returns.

Template key: IRNR.

Template description: “Shortcut Text in Email section for M210 Quarterly Rentals Returns & Non-Resident Tax” – explains recurring obligations and the service provided under the recurring contract.

Typical usage: Dropped into emails to IRNR/M210 clients to quickly describe the recurring tax service, scope and timing.

2.2 IRPF (Id: 20)

Purpose of template: Shortcut text for recurring annual IRPF and wealth tax services.

Template key: IRPF.

Template description: “Shortcut Text in Email section for IRPF Annual & Wealth Tax” – describes the annual declaration work and any wealth tax considerations.

Typical usage: Included in emails to clients enrolled in recurring IRPF/wealth tax services when confirming work for a new year.

2.3 M720 (Id: 21)

Purpose of template: Shortcut email text for clients whose recurring service relates to Modelo 720 (overseas asset declarations).

Template key: M720.

Template description: “Shortcut Text in Email section for M720 clients” – summarises the declaration requirements and the recurring support offered.

Typical usage: Used in messages to clients who need to file or update Modelo 720 as part of a continuing service.

3. PresentationParagraph templates

3.1 Introduction (Id: 79)

Purpose of template: Provide a reusable introductory paragraph that Users can insert at the start of emails.

Template key: Introduction.

Template description: “Insert short-cut in Email section” – a neutral greeting/introduction block describing the professional and context.

Typical usage: Used as the first paragraph in many outbound emails to ensure consistent tone and presentation.

4. ReminderEmail templates

4.1 Discontinous (Id: 80)

Purpose of template: Reminder email for clients who initially engaged but then stopped responding.

Template key: Discontinous.

Template description: “If client engaged but then stopped responding, reminder email for clients” – politely checks whether they still need assistance.

Typical usage: Sent manually or via reminder logic when a once-active client becomes unresponsive.

4.2 FailureToContact (Id: 81)

Purpose of template: Follow-up email when the client did not answer the User’s phone calls.

Template key: FailureToContact.

Template description: “Client didn't answer User's attempts to contact by phone” – explains that calls were attempted and offers alternative ways to connect.

Typical usage: Used after multiple unsuccessful call attempts as a written follow-up.

4.3 NonResponsive (Id: 82)

Purpose of template: Reminder email where the client has not replied to the User's previous email.

Template key: NonResponsive.

Template description: "No client response to User's attempt to contact by email" – gently prompts the client to respond or indicate they no longer require help.

Typical usage: Sent when an email has gone unanswered beyond the normal expected response time.

4.4 3rd Party No Response (Id: 126)

Purpose of template: Manual reminder email sent by Admin regarding non-responsive clients in relation to additional or third-party services.

Template key: 3rd Party No Response.

Template description: "Manual Reminder Emails sent by Admin for non-responsive clients for Additional Services" – nudges the client about outstanding actions or decisions on additional services.

Typical usage: Used by Admin when partner or add-on services are stalled due to client silence.

5. Guides templates

5.1 StrategyAdvice (Id: 141)

Purpose of template: Provide the text that is included in the printed PDF version of the Strategy Guide given to clients.

Template key: StrategyAdvice.

Template description: "Text included in Strategy Guide when printed as PDF" – summarises strategy, recommendations and key steps.

Typical usage: Appears automatically when a Strategy Guide is generated as a PDF for the client; not normally edited per email.

6. Fees templates

6.1 Bank Account Details (Id: 1183)

Purpose of template: Provide standard bank account details for payments to Advocate Abroad.

Template key: Bank Account Details.

Template description: Generic payment/IBAN text block used in emails or invoices to avoid re-typing bank details.

Typical usage: Inserted wherever a User needs to share bank details as part of a fee request or invoice follow-up.

7. OfferEmail templates

7.1 Information Requirements (Id: 1262)

Purpose of template: Explain what information the client must provide in order for the professional to prepare or finalise an offer.

Template key: Information Requirements.

Template description: "Information Requirements" – enumerates documents, facts or answers needed from the client before work can proceed or a quotation can be confirmed.

Typical usage: Sent alongside or just before an offer email where further client information is required to scope work or confirm fees.

8. Purpose of the Templates page

The Templates page documents all reusable text blocks used by the Advocate Abroad ecosystem (BackOffice CRM, Laravel admin, Main Website) for emails, offers, strategy notes and recurring-service communications.

It acts as a functional catalogue for developers, Admin and Users, showing what each template is for, how it is triggered, and how it fits into lead management, status automation and notifications described in the Business Logic / Trello-derived rules.

9. Template types and their roles

The platform uses several high-level template types, each corresponding to a distinct functional area: automated notifications, user-triggered emails, recurring-service messaging, reminder flows, guides and offer emails.

Template types are configured in Laravel / BackOffice and referenced from workflows and status transitions, so adding or editing a template often has direct effects on lead assignment, reminders and compliance behaviour described in the AA Business Workflow and Trello updates.

9.1 EmailNotifications templates

EmailNotifications are system-driven emails that are triggered automatically by events such as new leads, status changes, task deadlines, payment events, GDPR requests, survey cycles and client contact outcomes.

They are primarily referenced in the BackOffice status automation, task management and notification logic, and Trello issues highlight that each inbound email or status trigger must generate at most one notification email, with read/unread state and notification counts kept in sync.

9.2 StandardizedEmails templates

StandardizedEmails are reusable bodies or paragraphs that Users insert manually when emailing clients from BackOffice, such as ArrangeCall, POA instructions or standardised offer texts like MakeProposal and its variants.

They provide consistent wording for key workflows (selling full services, selling Paid Consultations, handling out-of-office scenarios) and are only exposed in the email editor if explicitly saved as templates, avoiding pollution of the list by one-off messages.

9.3 RecurringServices templates

RecurringServices templates (IRNR, IRPF, M720) are shortcut text blocks for recurring tax services, used to describe the nature and periodicity of the service when communicating with clients who have active recurring records.

They align with recurring-service logic in BackOffice, where certain Enquiry Types (for example Income Tax Declaration, Accounting / Bookkeeping) are inherently recurring and feed into recurring payments, task blockers and statistics.

9.4 PresentationParagraph templates

PresentationParagraph templates, such as Introduction, provide generic introductory text that can be dropped into emails and Strategy Guides to give a consistent tone and structure at the top of communications.

They do not trigger any automation themselves but improve consistency across StandardizedEmails, EmailNotifications and printed Strategy Guides, and can be updated centrally when branding or wording changes are required.

9.5 ReminderEmail templates

ReminderEmail templates are semi-manual snippets used by Users and Admin to follow up with clients who are non-responsive, partially engaged or unreachable, including Discontinous, FailureToContact, NonResponsive and 3rd Party No Response.

In Trello-documented workflows, these reminders complement automatic EmailNotifications by allowing Admin to send targeted manual nudges when automatic sequences are insufficient or when third-party / additional services are stalled.

9.6 Guides templates

Guides templates like StrategyAdvice are embedded in the Strategy Guide feature and are used when printing or exporting the Strategy Guide to PDF for clients, consolidating advice, context and recommended next steps.

They are referenced by the Strategy Guide print/export logic rather than the email system, but they must stay consistent with the email offer templates and statuses to avoid mismatches between written strategy and operational behaviour.

9.7 Fees and OfferEmail templates

Fees templates (for example Bank Account Details) provide reusable payment instructions that can be dropped into invoices and fee-related emails, while OfferEmail templates like Information Requirements define standard text for what information is needed before an offer can be finalised.

Trello-based business logic notes that Direct Service and Paid Consultation flows rely heavily on offer templates: only texts saved via Save As New Template appear in Direct Service lists, and DO NOT DELETE markers indicate templates that are hard-wired into these flows and must remain present.

9.8 AdminMessageTemplates (note)

AdminMessageTemplates are internal guidance or helper texts used by Admin (for example LandlordDisputeStrategy, SellPaidConsultation, PaymentMissing), not client-facing emails, and are therefore excluded from the main Template detail sections here.

They are still important in Trello workflows because they define how Admin should interpret situations like missing payments, delayed agreement to Paid Consultations, or unexpected Eliminated statuses that appear due to automation.

10. Placeholders and structure

Most templates include placeholders such as @@CLIENT_NAME@@, @@USER_NAME@@, @@INVOICE_NUMBER@@, @@TASKTITLE@@ that the BackOffice email engine replaces at send time using values from the client record, Strategy Guide and billing modules.

Developers must ensure that any new placeholder added to a template is backed by a corresponding field in the code and that removal of fields or renaming in the database is reflected in templates to avoid broken or blank insertions.

11. Triggers and status links

Many EmailNotifications are tied directly to status changes (New Enquiry, Waiting for Response, Eliminated, Freeze, Hibernated, Closed) or task lifecycle events (TaskExpired, TaskExpireFirstWarning, TaskExpireSecondWarning), and are documented alongside those rules in the AA Business Workflow.

When developers or Admin change status names, add new statuses or modify task logic, they must review corresponding templates to ensure that descriptions, links and expectations still match actual behaviour and that no orphaned templates remain.

12. Trello?derived notes about templates

The Trello export and JSON analysis highlight specific expectations about notifications and templates, such as the one notification per new email rule, the need for Delegatee Finished emails to contain a working hyperlink back to the client, and proper handling of third-party emails so they do not produce duplicate notifications.

They also clarify that some templates (for example Direct Service offers, Paid Consultation offers, NewLeadFrozen, NotifyBeforeAnonymisation, GDPR templates) form part of compliance-sensitive flows and must not be deleted or repurposed without updating the documented business logic and tests.

13. Template governance and versioning

Template content and availability should be governed centrally: changes to wording, placeholders or triggers should be tracked, tested in the Staging BackOffice environment and, where relevant, reflected in this Wiki so that developers and Users know what is expected.

Templates referenced in Trello issues or marked DO NOT DELETE should be treated as configuration assets with version control, regression tests and clear owners, not as ad-hoc texts that Users can freely remove or overwrite.

14. Usage guidance for developers and users

Developers should consult the Templates page whenever they work on notification logic, Strategy Guide printing, recurring services, referral flows or new ET-specific emails, to reuse existing templates and avoid duplicating keys or breaking placeholder contracts.

Users and Admin can use this page to understand which email or reminder is supposed to fire in each scenario, why they are receiving particular notifications, and how to choose the appropriate StandardizedEmail or ReminderEmail when communicating manually with clients.

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