CRM Alert Settings

Module Guide: CRM Alert Settings

Module Location

Settings > CRM > CRM Alert Settings

Module Purpose

This module serves as the central configuration page for all automatic notifications and alerts related to activities within the CRM. Its purpose is to set up email delivery parameters, define reminder time intervals, and assign notification recipients to ensure that no tasks or responses are missed by the sales team.

View & Configuration Explanation

This page is divided into several main sections for configuring the alert system:

1. Activity Settings (Email Configuration)

This section manages the connection to the email server that will be used to send all notifications from the CRM.

- **SMTP Server**: The outgoing email server address used by the company (e.g., `smtp.yourcompany.com`).

- **Username**: The username (usually an email address) of the account that has permission to send emails through the SMTP server.

- **Password**: The password for that email account.

2. Activity Alerts

This section manages general reminders for upcoming or scheduled activities.

- **Time Interval**: The time interval (in hours) before an activity is due, at which point the system will send a reminder. For example, if set to `24`, the system will send a reminder 24 hours before the activity's deadline.

- **Sender**: Determines which email account will be used as the sender for notifications:

  - **System Account**: Emails are sent from a single, centralized system email address (configured in the first section).

  - **User Account**: Emails are sent from the individual email account of the user who owns the activity (if integrated).

3. Late Response Notifications

This section is specifically for setting up escalation notifications if an activity does not receive a response or is not completed past a certain deadline.

- **Time Interval**: The time interval (in hours) after an activity has passed its deadline that will trigger a late notification to be sent.

- **Sender**: Determines the sending account for late notifications. The available options are:
    - **System Account**: Uses the system's email account.
    - **Email**: Allows for entering a specific email address as the sender.
- **Default Person**: A list of users or managers who will receive a notification in case of a delay. This serves as an escalation mechanism to ensure there is follow-up.

4. Action Buttons

- **Change**: A button to save all changes made on this configuration page.
- **Reset**: A button to revert all settings to their default or last saved values.

Integrated Workflow & Business Process

- **Reminder Automation**: Once configured, the system will automatically scan all scheduled activities in the CRM. If an activity is approaching its deadline (according to the Alert `Time Interval`), the system will send a reminder email to the responsible user.
- **Lateness Management**: If an activity is past its due date, the system will wait for the Notification `Time Interval` before sending an escalation email to the designated `Default

`Person`.

- **Productivity Improvement**: With automatic reminders, the risk of important tasks being missed is minimized, helping the sales team stay organized and responsive.

Tips & Important Notes

- **Credential Security**: For security reasons, ensure the email account used for SMTP is a dedicated service account for the application and not a personal email account.

- **Reasonable Intervals**: Set the `Time Interval` wisely. An interval that is too short can lead to notification spam, while an interval that is too long can make the reminder ineffective.

- **Escalation List**: Always update the `Default Person` list according to the relevant team structure or manager to ensure escalations reach the right people.

- This module is a "set and forget" configuration. Once set up correctly at the beginning of implementation, it will run in the background to support the daily operations of the CRM team.

Revision #1
Created 23 October 2025 11:00:53 by Muhammad Ali Akbar
Updated 23 October 2025 11:02:40 by Muhammad Ali Akbar