

Notification Management

Module Guide: Notification Management

Module Location

Settings > System Settings > Notification Management

Module Purpose

The **Notification Management** module is a control panel for setting up who will receive automatic email notifications for each specific type of notification within the system. Its purpose is to ensure that important information or alerts reach the right individuals or groups according to their roles and responsibilities.

View and Configuration Explanation

This page serves as a tool for mapping users to specific notification types.

- **Notification:** This selection contains a list of all available automatic notification types in the system. The example shown is "Credit note for sales return," but it could also include other notifications like "Purchase Order Approval" or "New Lead Received."
- **Company:** An option to select the company entity. Notification settings can be configured differently for each company if the system is multi-company.

- **Unnotified User:** The list box on the left contains all system users who are not yet registered to receive the currently selected notification type.
- **Notified User:** The list box on the right contains all users who will receive an email notification for the selected notification type.
- **Transfer Buttons:**
 - The double right arrow moves all users from the "Unnotified" list to the "Notified" list.
 - The double left arrow moves all users from the "Notified" list back to the "Unnotified" list.
 - Users can also select one or more specific names and use the single arrow buttons or move them individually.
- **Action Buttons:**
 - **Change:** Saves the recipient list configuration for the currently active notification type.

Steps to Configure Notifications

1. Select the type of notification you want to set up from the "Notification" selection.
2. Select the relevant company.

3. From the "Unnotified User" list, select one or more users you want to add as recipients.
4. Move the selected users to the "Notified User" box using the arrow buttons.
5. If any user in the "Notified User" list should not be receiving the notification, select them and move them back to the list on the left.
6. Once the recipient list on the right is correct, click the "Change" button to save the settings.
7. Repeat this process for every type of notification that needs to be configured.

Integrated Workflow and Business Process

- **Automated Information Distribution:** When an event occurs in the system, for example, a sales return is approved and a credit note is created, the system will automatically check this module to see who should be sent a notification email and then sends it.
- **Increased Response Speed:** By ensuring the right people get information directly, business processes can run faster. The finance manager will know immediately when a credit note is created, and the warehouse team will know when a sales return is approved for receipt.
- **Approval Workflow:** This module is very important for approval workflows. When a staff member submits a

document that requires approval, the system will send a notification to the manager registered here for the "Approval Request" notification type.

- **Reduced Manual Communication:** Reduces the need to send manual emails or messages between departments because the system does it automatically and in a standardized way.

Tips and Important Notes

- **Need-to-Know Principle:** Register users only for notifications that are truly relevant to their work. Registering everyone for all notifications will cause information overload and lead to important notifications being ignored.
- **Routine Maintenance:** The recipient list should be reviewed and updated periodically, especially when there are role changes, new employees, or employees who have left the company.
- Ensure that the email server configuration in the CRM Alert Settings or global email settings is correct, as this module only determines who the recipients are, not how the email is sent.

Revision #1

Created 23 October 2025 14:19:49 by Muhammad Ali Akbar

Updated 23 October 2025 14:21:24 by Muhammad Ali Akbar