

15.6 Push Notifications

As soon as the version 23.08 is installed or updated, in the CRM's notification area, you will find the following notice:

With this update, it's now possible to send push notifications to devices using the Wilson app. Each user can select the events to enable on their own device. If you want to provide this functionality to your users, click here to enable the service.

Once you click the link, you will be directed to the SETTINGS > OTHER SETTINGS > PUSH NOTIFICATIONS area.

Settings > Push notifications
View and activate the service for sending push notifications

Services available

| Provider name | Devices | Status | Actions |
|------------------------------|---------|---------------|-----------------------------|
| wilson4vtenext-business-push | 1 | Authenticated | <button>Deactivate</button> |

Mobile devices

| # | User Name | Provider name | Device name | Device platform | Created time | Actions |
|---|-----------|------------------------------|-------------|-----------------|---------------------|-------------------------|
| 1 | admin | wilson4vtenext-business-push | Redmi 8 | Android | 19-08-2023 09:08:28 | <button>Revoke</button> |

Push Notifications Page in the vtenext Settings

From this page, you can enable notifications for all CRM users by clicking the ACTIVATE button directly on the right side of the screen.

Settings > Push notifications
View and activate the service for sending push notifications

Services available

| Provider name | Devices | Status | Actions |
|------------------------------|---------|---------------|----------------------------|
| wilson4vtenext-business-push | 1 | Authenticated | Deactivate |

Mobile devices

| # | User Name | Provider name | Device name | Device platform | Created time | Actions |
|---|---|---|---|---|--|------------------------|
| | <input type="text" value="Search for User Name"/> | <input type="text" value="Search for Provider name"/> | <input type="text" value="Search for Device name"/> | <input type="text" value="Search for Device platform"/> | <input type="text" value="Search for Created time"/> | |
| 1 | admin | wilson4vtenext-business-push | Redmi 8 | Android | 19-08-2023 09:08:28 | Revoke |

Once done, in the **AVAILABLE SERVICES** area, the **status** label will change from **NOT AUTHENTICATED** to **AUTHENTICATED**. Further down, you will find another section called **MOBILE DEVICES**, where you will see the list of all devices of users who have chosen to activate vtenext's push notifications from the **Wilson app (but we'll see that shortly)**.

So, once push notifications are activated, you will need to access the Wilson app and proceed as follows:

10:06



Hi Administrator

Events

Open calendar

AUGUST SEPTEMBER OCTOBER NOVEMBER

30

Wed

31

Thu



Enable push notifications

Your CRM supports push notifications.
Do you want to enable them?

Later

Enable

Firstly, Wilson will ask to ENABLE push notifications. Simply tap the ENABLE button to activate them. If you choose to enable them 'later', you can always do so from the app settings.

← Configure push notifications

Enable notifications

2FA

Enable to receive 2FA notifications



Talks

Enable to receive notifications from the Talks module



Messages

Enable to receive notifications from the Messages module



Process tasks

Enable to receive notifications from the Processes module



Event reminder

Enable to receive notifications of upcoming events



Task reminder

Enable to receive notifications of upcoming tasks



CRM general notifications

Enable to receive CRM general notifications



Receive notifications

By clicking on ENABLE, the Wilson app will show us this screen, giving us the option to choose which notifications to enable. Specifically, you can enable notifications for:

| | |
|----------------------------------|---|
| 2FA | allows receiving notifications for two-factor authentication |
| Talks | enables receiving notifications for the Conversations module. CAUTION: A notification won't be sent each time a new conversation is received; they are grouped. |
| Messages | enables receiving notifications for the Messages module. CAUTION: A notification won't be sent for every new email received; they are grouped |
| Process Tasks | allows receiving notifications for process tasks involving the logged-in user |
| Event Reminders | enables receiving notifications for upcoming Events |
| Task Reminders | enables receiving notifications for upcoming Tasks |
| General CRM notifications | enables all generic CRM notifications (by default, this option is disabled due to the potentially high number of push notifications it could generate) |

← Configure push notifications

Event reminder

Enable to receive notifications of upcoming events



Task reminder

Enable to receive notifications of upcoming tasks



CRM general notifications

Enable to receive CRM general notifications



Receive notifications

Custom time

Choose a custom time to receive notifications:



From 08:00 to 19:00

Monday, Tuesday, Wednesday,
Thursday, Friday, Saturday

Skip holidays



Always

Enable to always receive notifications, regardless of the time of day



Advanced

Verify simultaneous use

Notifications are not sent if the user is using the web client at the same time



Additionally, you can configure WHEN TO RECEIVE NOTIFICATIONS, with the following options:

| | |
|------------------------|--|
| Custom Schedule | allows receiving notifications during user-selected days and hours. For example, you can set to receive notifications from Monday to Friday, between 8:00 AM and 7:00 PM |
| Always | allows receiving app notifications at all times, any day of the week. |



Configure push notifications

Enable to receive notifications of
upcoming events



Task reminder

Enable to receive notifications of
upcoming tasks



CRM general notifications

Enable to receive CRM general



Custom time

Start time

08:00

End time

19:00

Days of the week

Sun

Mon

Tue

Wed

Thu

Fri

Sat

Skip holidays



Cancel

Save

Here's how the screen for choosing the custom schedule for receiving Wilson app notifications looks:



Configure push notifications

Enable to receive notifications of upcoming tasks

CRM general notifications

Enable to receive CRM general notifications



Receive notifications

Custom time

Choose a custom time to receive notifications:



From 08:00 to 19:00

Monday, Tuesday, Wednesday,
Thursday, Friday, Saturday
Skip holidays



Always

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Advanced

Verify simultaneous use

Notifications are not sent if the user is using the web client at the same time



Idle time

Notifications are sent if the web client has been idle for more than 5 min



Finally, you can enable or disable the app's concurrent usage check. This feature allows vtenext to check if the user is using the app concurrently with the web client. You can set an idle time, so if the user is using the web client and is away from their workstation for a certain number of minutes, as determined by the idle time, they will start receiving notifications on their mobile device. If the web client continues to be used with this option active, push notifications will stop being sent to the mobile device.

← Configure push notifications

Task reminder

Enable to receive notifications of upcoming tasks



CRM general notifications

Enable to receive CRM general notifications



Receive notifications

Custom time

Choose a custom time to receive notifications:



From 08:00 to 19:00

Monday, Tuesday, Wednesday,
Thursday, Friday, Saturday
Skip holidays



Always

Enable to always receive notifications, regardless of the time of day



Advanced

Verify simultaneous use

Notifications are not sent if the user is using the web client at the same time

Idle time

Notifications are sent if the web client has been idle for more than

5 min

10 min

15 min

30 min

60 min

And here is how the interface for selecting the idle time looks. The available options, determined in minutes, are: 5, 10, 15, 30, 60.

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