


5.5 Notification Module

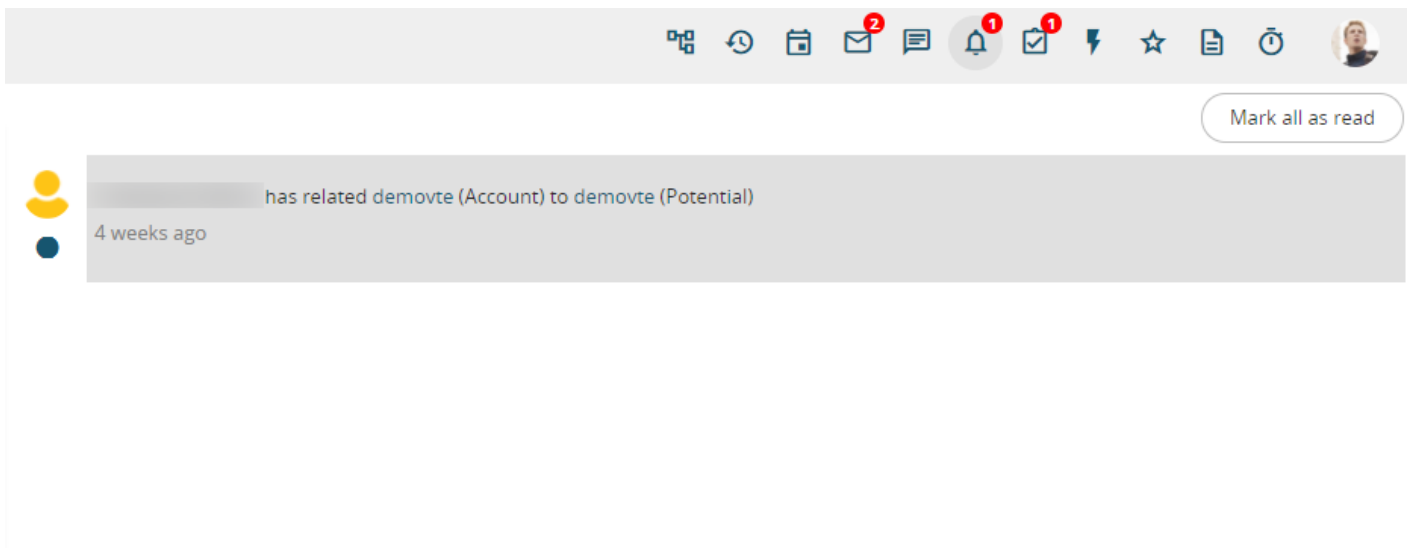
vtenext keep users informed of the data of interest by means of the Notifications tool.

Each user can define the following details from the Preferences tab:

- notification method: Email/vtenext (“Notify me via” field);
- frequency of unread notifications summary emails since the latest click on the globe icon, selecting the time frame from the preset values (“Notifications summary” field);
- the topics for which you require notification (module notification Settings), selecting updates for creation and/or editing for each module.

Warning! Notifications of the Modules Notification Settings are related to the functions assigned to the user. This means you will receive a notification whenever a different user creates/edits a record assigned to you.

To display notifications click on  Unread notifications are shown by means of a red number. To mark a notification as read, click on the notification as shown in the figure:



You can also receive notifications on records assigned to other users or on updating of a filter, by selecting the bell icon alongside the list of filters or in each record.

The screenshot shows a CRM application with a list of leads. The interface includes a search bar, a sidebar with navigation icons, and a top navigation bar. A red arrow points to the notification bell icon in the top right corner of the interface.

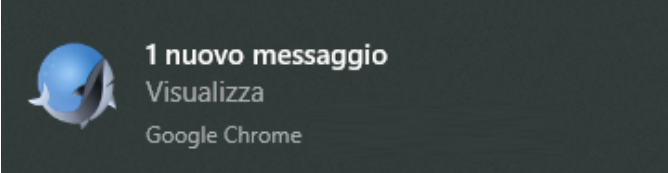
Action	Lead No	Last Name	First Name	Company	Phone	Assigned To
<input type="checkbox"/>	LEA15	COSSTRAVEL	ALDE	Wallback - COSSTRAVEL S.p.A.	3463582373	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA6	Davis	Jennifer	Vtecrm	(861) 252-2877	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA17	DONATIELLES	BATTISTE	EffeEsse donatielles s.a.s.	292109719	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA18	FANTASIA	MARIA	Poligrutte S.p.A.	3385473549	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA24	GLEARMIN	ADRIAN	Pinnura s.r.l.	329248368	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA14	GNATABEL	GUIDE	GNATABEL - PolimoRE s.n.c.	445362391	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA2	Johnson	Patricia	T3m invest a/s	(961) 827-7432	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA4	Jones	Barbara	Vtecrm inc	(968) 611-2019	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA12	LOMANRTIRE	CARL COSINE	Lomanrtire - Tretexes S.p.A.	(833)39140402	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA20	MARILIZZURCK	PAUL	Marilizzurck - Eravase S.p.A.	(308)931750154	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA7	Miller	Maria	T3m invest a/s	(269) 048-3382	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA9	Moore	Margaret	Vtecrm inc	(757) 175-2221	formazione.vtenext@gmail.com (Francesco ...)
<input type="checkbox"/>	LEA23	POLARISMON	ROSARIE	Polarismon - FRÉtamin s.a.s.	(885)491260290	formazione.vtenext@gmail.com (Francesco ...)

 Notification disabled on record/filter

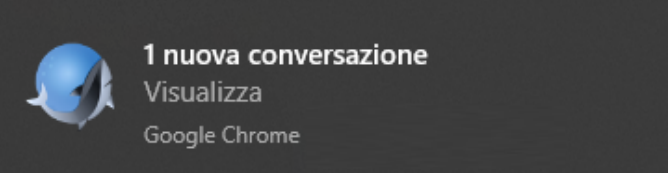
 Notification enabled on record/filter

Example of use of notification on filter: receive an alert when a new Trouble Ticket enters the “Urgent Requests” filter (filter based on a priority class).

The ability to enable and receive desktop notifications will be implemented from version 19.10. Whenever a new conversation or a new email is received, the notifications will alert you with popups at the bottom right of your preferred browser.



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Google Chrome



1 nuova conversazione
Visualizza
Google Chrome

N.B.: to enable browser notifications, refer to the official online guide for Chrome, Firefox or any other browser used on your computer. Notifications are not displayed if we are using Http protocol to reach the crm.

Revision #1

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