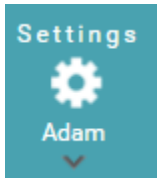


Setting up Notification Settings

Below are steps to show you how to setup Notification Settings.

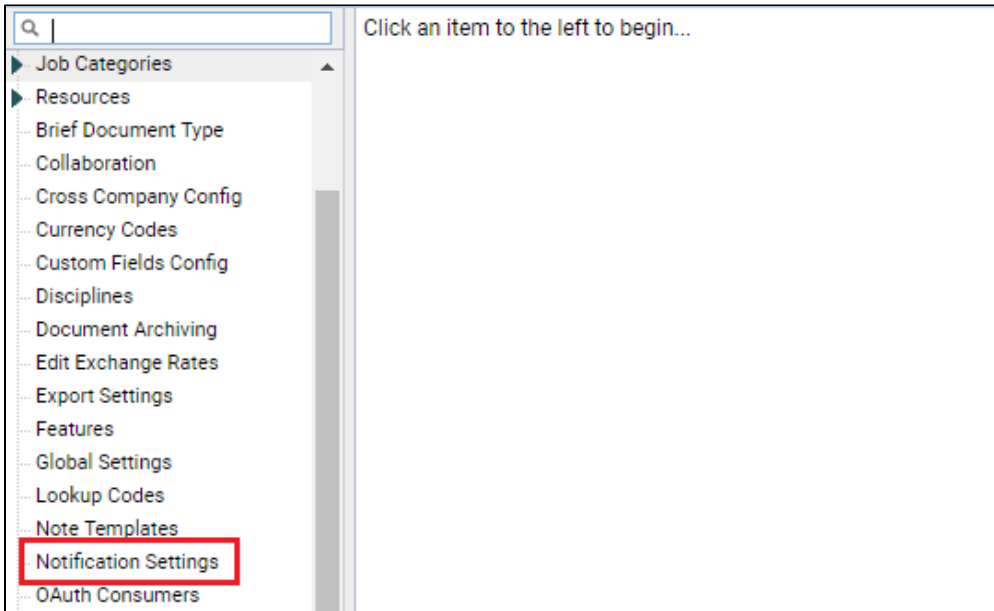
Step-by-step guide

1. Click the **Settings** button on the Ribbon.



The *Configuration* screen appears.

2. Click the **Notification Settings** item in the Configuration tree.



The *Notification Settings* screen appears.

3. Click the drop down arrow on the **Notification Form** field, and select the form or document for which to create a notification template.

In this example, **Cost Estimate** was selected.

NOTIFICATION SETTINGS

Notification Form:

Populate Notify body:

Attach Related Documents:

Create a custom subject and body to be used in notifications for the selected Form.

Notify Subject:

Cost Estimate

Cost Sheet

Cost Variance Statement

Credit Note

Custom Text Doc 10

Custom Text Doc 4

Custom Text Doc 5

Custom Text Doc 6

Custom Text Doc 7

Custom Text Doc 8

Custom Text Doc 9

Select a form

The following templates are available for use in the Notify Body:

- {UserName} - The name of the currently logged in user
- {ConfigCompanyName} - The name of the current company logged into
- {FormName} - A user friendly name for the form
- {JobNo} - The job number of the job that the document belongs to
- {DocNo} - The document number of the document
- {DocNotes} - Notes on the document
- {JobRemarks} - Remarks specified on the job the document belongs to
- {DocStatus} - The status of the document

4. To use a standard message determined by Chase for this notification instead of a custom one, check the **Populate Notify body** checkbox.
5. To create a custom message, edit the templates in the notify body.

In this example, {JobNo} was entered in the Notify body next to {FormName}.

NOTIFICATION SETTINGS

Notification Form:

Populate Notify body:

Attach Related Documents:

Create a custom subject and body to be used in notifications for the selected Form.

Notify Subject:

B *I* U

{FormName}:

{DocNotes}

Current Status: {JobRemarks}

The following templates are available for use in the Notify Body:

- {UserName} - The name of the currently logged in user
- {ConfigCompanyName} - The name of the current company logged into
- {FormName} - A user friendly name for the form
- {JobNo} - The job number of the job that the document belongs to
- {DocNo} - The document number of the document
- {DocNotes} - Notes on the document
- {JobRemarks} - Remarks specified on the job the document belongs to
- {DocStatus} - The status of the document
- {JobStatus} - The status of the job the document belongs to
- {1st Job Brief} - The body of the 1st brief on the job the document belongs to

6. Once satisfied with your template, click the **Save** button to make your changes permanent.

NOTIFICATION SETTINGS

Notification Form: Cost Estimate

Populate Notify body:

Attach Related Documents:

Create a custom subject and body to be used in notifications for the selected Form.

Notify Subject: Chase Message: {FormName} for Job {JobNo} ({CustomerName}) - {ProductNan}

{FormName} {JobNo}:
{DocNotes}

Current Status: {JobRemarks}

The following templates are available for use in the Notify Body:

- {UserName} - The name of the currently logged in user
- {ConfigCompanyName} - The name of the current company logged into
- {FormName} - A user friendly name for the form
- {JobNo} - The job number of the job that the document belongs to
- {DocNo} - The document number of the document
- {DocNotes} - Notes on the document
- {JobRemarks} - Remarks specified on the job the document belongs to
- {DocStatus} - The status of the document
- {JobStatus} - The status of the job the document belongs to
- {1st Job Brief} - The body of the 1st brief on the job the document belongs to

A *Save Changes?* dialog appears.

7. Click the **Yes** button to continue.

Save Changes? X

? Your changes are about to be saved.
Are you sure you want to modify the current Notification Form?

Yes No

Once you send out an email of your Cost Estimate, you will be able to see the message you have setup in the Notification Settings.

Send Notification for Cost Sheet

From: administrator@chasesoftware.co.za

To (Contacts): Start typing to get a filtered (Contacts) recipient list or press the down arrow

To (Employees): Tumelo Morake ✕

To (Other):

Subject: Chase Message: Cost Sheet for Job 37 (BMW South Africa) - 4 series, 4 series billboard

Document: Insika Production - CE - 27.pdf

Attachments: Upload

Rich text editor toolbar: Bold, Italic, Underline, Strikethrough, Text color, Background color, Bulleted list, Numbered list, Indent, Outdent, Undo, Redo, Link, Unlink, Source code, Full screen.

Cost Sheet Job 37:

Current Status:

Send Cancel

Related articles

Content by label

There is no content with the specified labels

