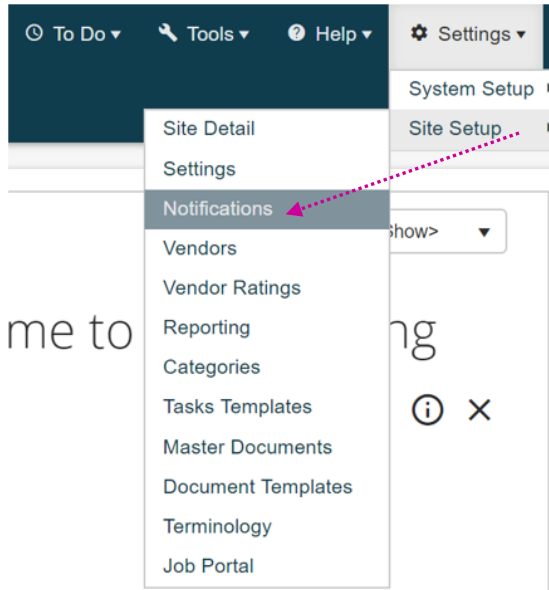


Site Notification Setup

Notifications is a convenient feature that can be setup to generate an email to individuals based on requests being submitted through the portals, work orders being opened or closed also when the threshold of a work order is met.

The administrator can setup the Notifications by hovering over Tools in the blue toolbar → Site Setup → click on Notifications.



Notifications Page:

Notify When...	Threshold	Project Mgr	Warranty Rep	Primary Homeowner	Secondary Homeowner	Email Template	Merge Fields Available
Trade Partner submits a request?		<input type="checkbox"/>	<input type="checkbox"/>			<Use Default Template>	Work Order, Request, Home, Community, Business, Site
Community / Homeowner submits a request?		<input type="checkbox"/>	<input type="checkbox"/>			<Use Default Template>	Home, Community, Business, Site
Request is opened?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<Use Default Template>	Request, Home, Community, Business, Site
Request is closed?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<Use Default Template>	Request, Home, Community, Business, Site
Work Order threshold is met?	None	<input type="checkbox"/>	<input type="checkbox"/>			<Use Default Template>	Home, Community, Business, Site

The following Notifications can be set-up.

1. Vendor submits a request? An email can be sent to the Staff and/or Supervisor assigned to the Job when the

Site Notification Setup

Vendor submits a request through the Vendor Portal. Such as a Schedule update/change, completion of the work order and applying action taken notes.

2. Project / Homeowner submits a request? An email can be sent to the Staff and/or Supervisor assigned to the Job when the Homeowner or Project Contact submits a new list and work order(s) through the Project or Homeowner Portal.
3. List is opened? An email can be sent to the Staff, Supervisor, Primary Homeowner and/or Secondary Homeowner assigned to the Job when a new list is opened in .NET.
4. List is closed? An email can be sent to the Staff, Supervisor, Primary Homeowner and/or Secondary Homeowner assigned to the Job when a list is closed in .NET.
5. Item threshold is met? An email can be sent to the Staff and/or Supervisor assigned to the Job when a customer has more than 10 work orders or X number (selected form the drop-down) of work orders open on the job.

Notify When...	Threshold	Project Mgr	Warranty Rep	Primary Homeowner	Secondary Homeowner	Email Template	Merge Fields Available
Trade Partner submits a request?		<input type="checkbox"/>	<input type="checkbox"/>			<Use Default Template>	Work Order, Request, Home, Community, Business, Site
Community / Homeowner submits a request?		<input type="checkbox"/>	<input type="checkbox"/>			<Use Default Template>	Home, Community, Business, Site
Request is opened?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<Use Default Template>	Request, Home, Community, Business, Site
Request is closed?		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<Use Default Template>	Request, Home, Community, Business, Site
Work Order threshold is met?	None	<input type="checkbox"/>	<input type="checkbox"/>			<Use Default Template>	Home, Community, Business, Site

Select which notifications you would like sent out and to whom (Staff, Supervisor or Homeowner(s)) by default the <Use Default Template> will be sent.

The administrator of the application has the ability to customize the email that is sent by going to Settings → Site Setup → Email Templates (For an overview of how to setup email templates please refer to the following reference document **Email Templates_Create new or edit** available on the University under Training Documents → Administrator). Once the email template is created please click on the Notifications tab to select the template from the drop down then click the Save button located to the bottom left of the page.

Note: Next to each Notification displays the merge fields available in red.