

New notification rules have been added on Customers. Now you can choose what type of notifications each Contact on a Customer receives.

This is handy if you want one of the Contacts to receive everything and another Contact should only receive Usage notifications for example.

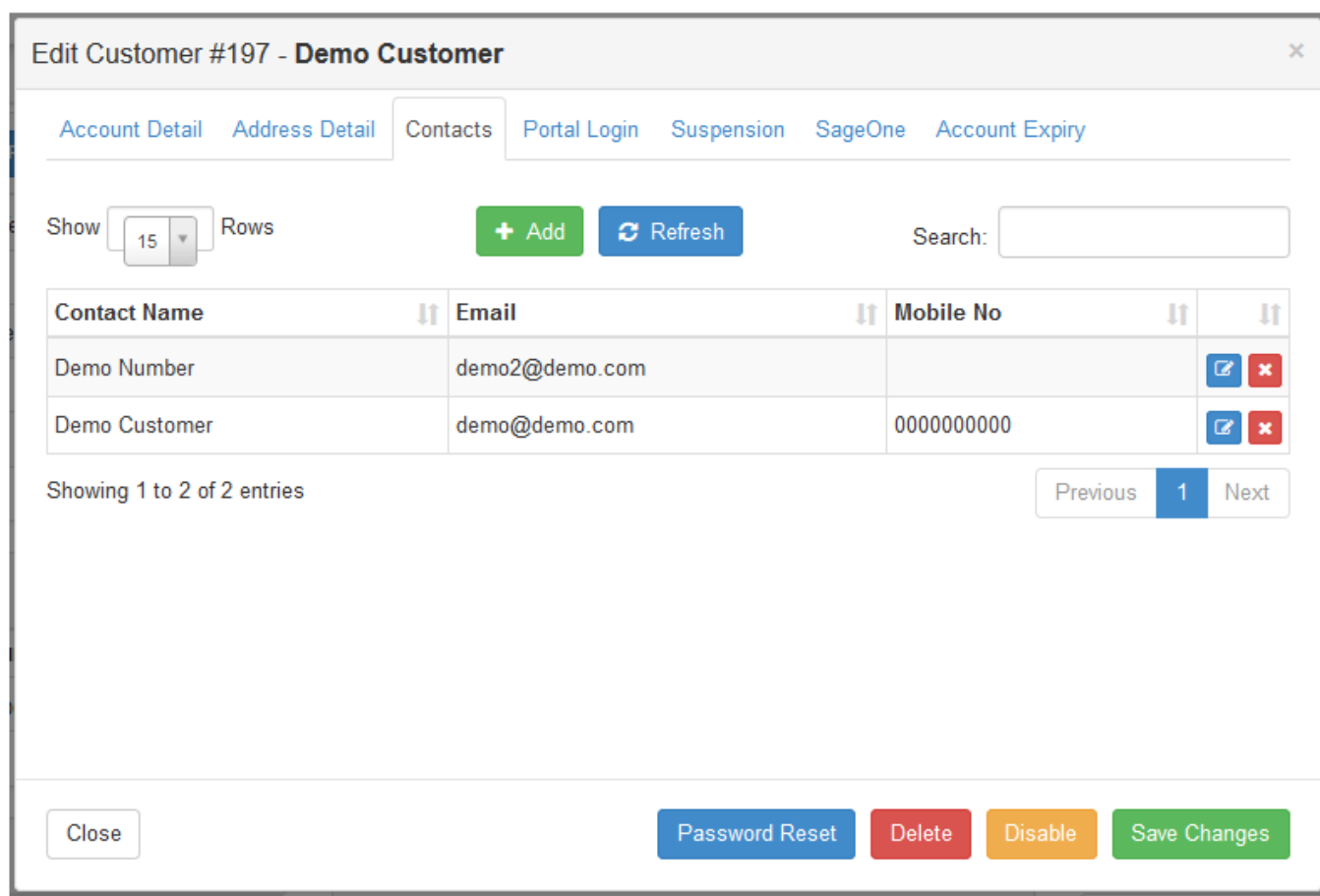
You can also add an extra Contact that does not receive any notifications.

Just note that there should be at least one Contact that has all the notification rules or all rules has to have a Contact.

To add or edit Contacts with the new notification rules,

Go to Customers -> Edit Customer -> Contacts tab





All Contacts of a Customer will now appear on the Contacts tab and not just "Additional Contacts" like before.



Edit Customer #197 - Demo Customer

Account Detail Address Detail **Contacts** Portal Login Suspension SageOne Account Expiry

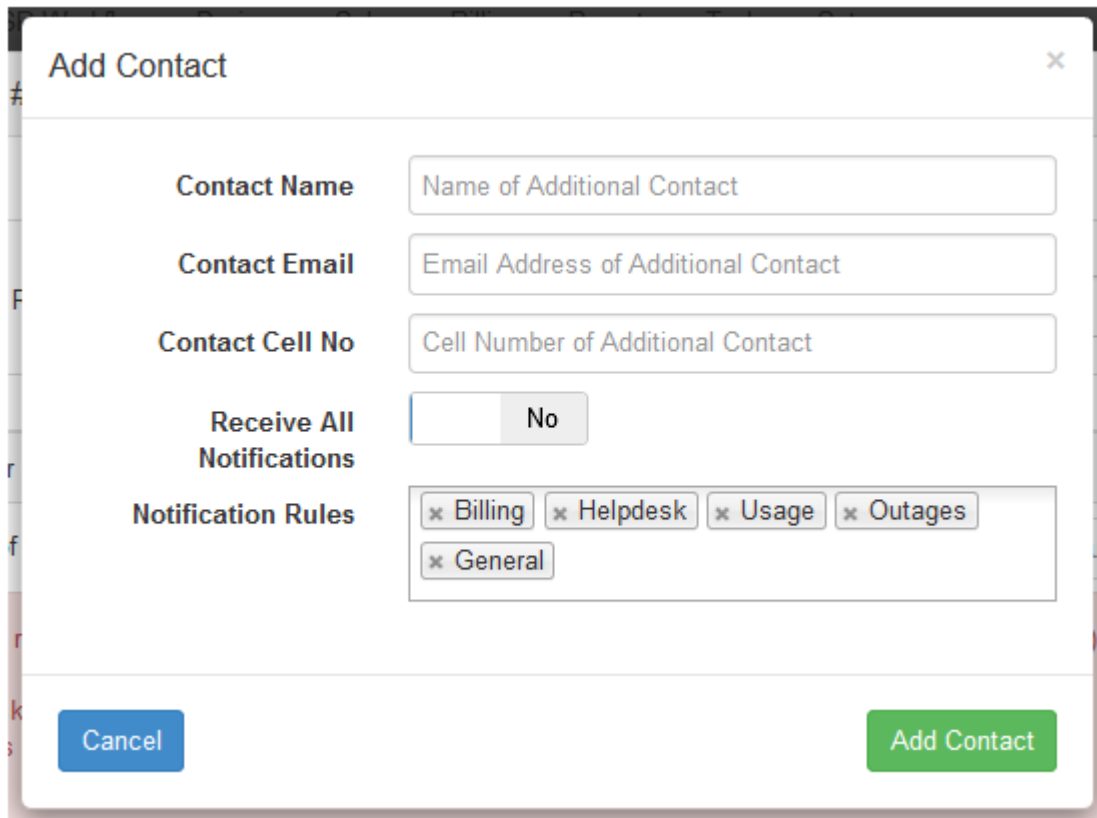
Show Rows + Add Refresh Search:

Contact Name	Email	Mobile No	
Demo Number	demo2@demo.com		 
Demo Customer	demo@demo.com	0000000000	 

Showing 1 to 2 of 2 entries Previous 1 Next

Close Password Reset Delete Disable Save Changes

Click on Add to add a new Contact, or Edit (Blue icon) next to a Contact to edit it.



The image shows a modal window titled "Add Contact" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Contact Name:** A text input field with placeholder text "Name of Additional Contact".
- Contact Email:** A text input field with placeholder text "Email Address of Additional Contact".
- Contact Cell No:** A text input field with placeholder text "Cell Number of Additional Contact".
- Receive All Notifications:** A toggle switch currently set to "No".
- Notification Rules:** A container with five buttons: "× Billing", "× Helpdesk", "× Usage", "× Outages", and "× General".

At the bottom of the modal, there are two buttons: a blue "Cancel" button on the left and a green "Add Contact" button on the right.

When you turn off "Receive All Notifications" on a Contact, it will show you a "Notification Rules" field where you can remove or add the rules for that Contact

When you still have a notification rule missing on your Contact(s), then a warning message will appear similar to the following, telling you which rule is missing:

Edit Customer #197 - Demo Customer

Account Detail

Address Detail

Contacts

Portal Login

Suspension

SageOne

Account Expiry

Show

15

Rows

+ Add

Refresh

Search:

Contact Name	Email	Mobile No	
Demo Customer	demo@demo.com	0000000000	<div></div> <div></div>

Showing 1 to 1 of 1 entries

Previous1Next

All notification rules has to have a contact. The following notification rules still need to be added to contact(s):

- Billing
- Helpdesk
- Outages
- General

Close

Password Reset

Delete

Disable

Save Changes

All notification rules has to have a Contact. The following notification rules need to be added to Contact(s):

- Billing
- Helpdesk
- Outages
- General
- Usage

Usage Notification Settings	+ Add	↺
Send Notification at 100%		
SMS to 0000000000		
Email to demo@demo.com, demo2@demo.com		

All Contact that you added the Usage notification to will appear in the “Usage Notification Settings” block on a Customer. Usage notification messages will be sent to all email addresses and mobile numbers appearing in the block.