Transactions Notifications

There are two ways to send notifications to users about Transactions creation, update or removal:

- Send notifications to specific groups without Notification scheme adjusting
- Add Event to Notification scheme

Send notifications to specific groups without Notification scheme adjusting

You can inform members of specific groups about any changes of transactions.

To set notifications go to CRM Administrator Menu/ Transactions Tab:

Event	Attribute	Value	Subject	Body	Groups	
 Transaction of Transaction u Transaction n 	reation pdate emoval				Start typing to search for groups.	Add
Transaction update	Status	fact	Transaction in % {new_tran_sale} is updated	lssue: %{new_tran_sale}. Updates: Status = Fact.	2 atran-notify	Delete
Transaction removal			Transaction in % {old_tran_sale}	lssue: %{old_tran_sale}. Removed	2atran-notify	Delete

Examples:

Event	Attribute	Value	Subject (Subject of letter)	Body (Letter's text)
Transaction creation	-	-	Transaction in %{new_tran_sale} is created	lssue: % {new_tran_sale} . Created.
Transaction removal	-	-	Transaction in %{old_tran_sale} is removed	Issue: % {old_tran_sale} . Removed
Transaction update	Status	Fact	Transaction in %{new_tran_sale} is updated	Issue: % {new_tran_sale} . br/> Updates: Status = Fact.
Transaction update	Status	Plan	Transaction in %{new_tran_sale} is updated	Issue: % {new_tran_sale} . br/> Updates: Status = Plan.

Links %{new_tran_sale} and %{old_tran_sale} result to show transaction's issue key.

Links %{new_tran_sale_summary} and %{old_tran_sale_summary} return the issue key and issue's summary.

In this case you can manage how email's (notification's) subject and body will look like. For example:

Mail	Transaction in SALE-41 is removed	Subject
胀	mailbot@teamlead.ru Teamlead % +7 (812) 309-29-57 0	
Issue: Remov	SALE-41. ved	

Add Event to Notification scheme

Go to Administrator menu/ Issues/ Notification Schemes, find in the table Transactions Events (**Transaction Added**, **Transaction Changed**, **Transaction Deleted**) and press 'Add' to add groups, roles or users to receive notifications about correspondent event.

Applications Projects Issues	Add-ons User management System	
	Add Notification	0
Issue types	Notification Scheme: Default Notification Scheme	
losuo typos	Please select the type of Notification you wish to add to scheme:	
Sub-tasks	Events Issue Worklog Updated Issue Worklog Deleted Generic Event	
WORKFLOWS	TransactionUpdate Transaction Changed	
Workflows	Transaction Added Transaction Deleted (Select the notifications that you want to assign)	
Workflow schemes	Current Assignee	
SCREENS	O Reporter	
Screens	Current User	
Screen schemes	O Project Lead	
Issue type screen schemes	Component Lead	
FIELDS	Single User	Start typing to get a list of possible matches.
Custom fields	⊖ Group	Choose a group
Field configurations	O Project Role	Choose a project role
Field configuration schemes	Single Email Address	
ISSUE FEATURES		Notifications will be sent only for public issues. Public issues are issues which have a Permission scheme that gives the 'Browse Projects' permission to 'Anyone' (any non-logged-in users).
Time tracking	All Watchers	
Issue linking	 User Custom Field Value 	Choose a custom field
ISSUE ATTRIBUTES	Group Custom Field Value	Choose a custom field
Statuses		
Resolutions	Add Cancel	
Priorities		
Issue security schemes		
Notification schemes		
Permission schemes		

In this case an email will have standard notification view:

