

# [75.1 Release] User (Setup) - Updates to Alert Notifications (17793)

Last Modified on 09/08/2025 12:40 pm PDT

The following updates have been applied to the alert system in Navusoft that extends to multiple screens:

## Add/Edit User and User Profile

- 1. An *Alert Notification Method* grouping has been added with options for *In Application Popup*, *Text Message*, and *Email*. By default, new users are set to *In Application Popup* and *Email*.
  - o If **In Application Popup** is not selected, users will not see the blue notification popup alerts.
  - o If **Text Message** is selected, text messages will be sent with a character limit of 320.
- 2. A new setting, *Send Daily Activity Summary Email*, has been added and is selected by default for new users. When enabled, users receive an email snapshot of their activities from the Recent Activity home screen.

ADD USER

STATUS

Active

FIRST NAME

LAST NAME

Valid email is required. Email with temporary password will be sent to this email.

EMAIL

MOBILE PHONE

(999) 999-9999

OFFICE PHONE

(999) 999-9999

TITLE

DEPARTMENT

MANAGER

SALES GOAL TYPE

None

EXTERNAL ID

EXTERNAL USER ID

Alert Notification Method

☒ In Application Popup

☐ Text Message

☒ Email

☒ Send Daily Activity Summary Email

DEFAULT HOMEPAGE

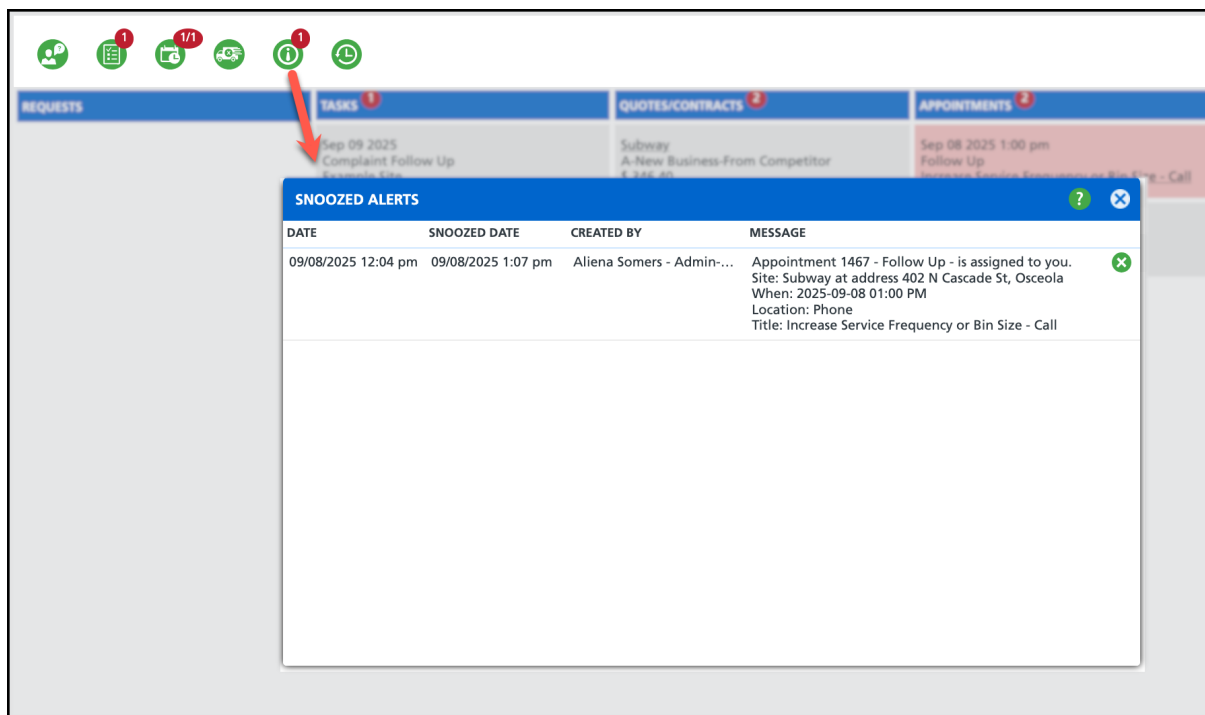
ONLINE IMAGE

Select Image...

BROWSE...

## Alert History

*Alert History* has been renamed to *Snoozed Alerts*, and the History tab is no longer available.



## Recent Activity

The following updates have been made to the Activities section of the Recent Activity screen, the Recent Activity popup, and the Activity Calendar:

1. The Activities section now displays **all alerts**, not just those linked to a site. Account-level alerts will show the **account name**.
2. The logic for the Recent Activity popup and the Activity Calendar has been updated to include **both site-level and account-level alerts**.

QUOTES/CONTRACTS <sup>2</sup>	APPOINTMENTS <sup>2</sup>	ACTIVITIES <sup>1</sup>
Subway A-New Business-From Competitor \$ 346.40	Sep 08 2025 1:00 pm Follow Up Increase Service Frequency or Bin Size ...	Today10:23 am to 1:04 pm1 Alerts0 Activities1 Views
Viebrock Associates A-New Business-New Owner \$ 0.00	Sep 09 2025 1:00 pm Account Retention	1:04 pmAppointment 1467 - Follow Up - is assigned to you. Site: Subway at address 402 N Cascade St, Osceola When: 2025-09-08 01:00 PM Location: Phone Title: Increase Service Frequency or Bin Size - Call Subway
		10:23 amSite ViewedSubway
		Fri 09/05/2511:22 am to 2:43 pm0 Alerts1 Activities3 Views
		2:43 pmSite ViewedViebrock Associates
		11:23 amProposal CreatedSubway
		11:22 amSite ViewedSubway
		Site ViewedExample Site

RECENT ACTIVITY <sup>2</sup>
ACTIVITIES <sup>1</sup>
Today10:23 am to 1:04 pm1 Alerts0 Activities1 Views
1:04 pmAppointment 1467 - Follow Up - is assigned to you. Site: Subway at address 402 N Cascade St, O... When: 2025-09-08 01:00 PM Location: Phone Title: Increase Service Frequency or Bin Size ... Subway
10:23 amSite ViewedSubway
Fri 09/05/25
2:43 pmSite Viewed
11:23 amProposal
11:22 amSite Viewed
11:22 amSite Viewed
Wed 09/03/25
1:47 pmAppointment 1466 - Account Retention - is assigned to you. Site: Example Site at address 1234 W Valley Blvd, ... When: 2025-09-09 01:00 PM Location: Client's Site Example Site
1:46 pmSite ViewedExample Site
Wed 08/27/25
2:18 pmSite Viewed
2:17 pmSite Viewed
Tue 08/26/25
1:35 pmSite Viewed
9:04 amSite Viewed
9:04 amSite Viewed
9:04 amSite Viewed
9:03 amSite Viewed
9:02 amSite Viewed
9:00 amSite Viewed

ACTIVITY HISTORY CALENDAR						
AUG 2025						
SUN	MON	TUE	WED	THU	FRI	SAT
		0 Alerts 2 Activities 2 Views			0 Alerts 0 Activities 2 Views	
Aug 24	Aug 25 4:05 am to 4:06 am 0 Alerts 0 Activities 2 Views	Aug 26 3:31 am to 8:35 am 0 Alerts 0 Activities 9 Views	Aug 27 9:17 am to 9:18 am 0 Alerts 0 Activities 2 Views	Aug 28	Aug 29	Aug 30
	Aug 31	Sep 1	Sep 2	Sep 3	Sep 4	Sep 5
			8:46 am to 1:47 pm 1 Alerts 0 Activities 1 Views		6:22 am to 9:43 am 0 Alerts 1 Activities 3 Views	Sep 6
	Sep 7	Sep 8 5:23 am to 1:04 pm 1 Alerts 0 Activities 1 Views	Sep 9	Sep 10	Sep 11	Sep 12
	Sep 14	Sep 15	Sep 16	Sep 17	Sep 18	Sep 19
	Sep 21	Sep 22	Sep 23	Sep 24	Sep 25	Sep 26
						Sep 27