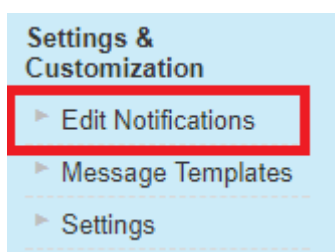


How do I add or modify notifications?

Michael C. - 2021-02-16 - Grant Management Guides

When a grant moves from status to status, an email could be sent to the Club who submitted the grant, to grant users, and to the grant administrator. To see how these notifications are set, or to change the please follow the steps below:

1. From the Grants area please click **Edit Notifications** on the left.



2. This takes you to the **Notifications** screen. From this page you can do a few things:
 - o **Add Notification** - This allows you to add a new notification trigger. So if a Grant's status changes you can have the system send an email.
 - o **View Users** - Displays the Grant Users or the Grant Administrators.
 - o **Edit** - Allows you to change the existing notification.
 - o **Delete** - Removes the notification.

Notifications

This screen allows you to create various notifications to the users as each activity is triggered, such as a status change. Click on the Add Notification button to create a new notification. [Edit Help Text](#)

[+ Add Notification](#)

| Activity / Trigger | Grant Administrator | Grant Users | Club Contact | Area Governor |
|--|----------------------------|----------------------------|--------------|---|
| | View Users | View Users | | |
| Any Status → Grant Application is Archived | | | ✓ | Edit Delete |
| Any Status → Approved | ✓ | ✓ | ✓ | Edit Delete |
| Any Status → Awaiting Further Information | ✓ | | ✓ | Edit Delete |
| Any Status → Rejected | ✓ | ✓ | ✓ | Edit Delete |
| Any Status → Under Review | | | ✓ | Edit Delete |
| Any Status → Awaiting Further Information | ✓ | | | Edit Delete |
| Any Status → Adjustment Requested | ✓ | | | Edit Delete |
| Any Status → Cancelled | ✓ | | ✓ | Edit Delete |
| Any Status → Initial Request Submitted | ✓ | ✓ | ✓ | Edit Delete |
| Any Status → Completed | ✓ | ✓ | ✓ | Edit Delete |

Add Notification

1. To add a new notification click **Add Notification**.

Notifications

This screen allows you to create various notifications to the users as each activity is triggered, such as a status change. Click on the Add Notification button to create a new notification. [Edit Help Text](#)

[Add Notification](#)

| Activity / Trigger | Grant Administrator | Grant Users | Club Contact | Area Governor |
|--|----------------------------|----------------------------|--------------|---|
| | View Users | View Users | | |
| Any Status → Grant Application is Archived | | | ✓ | Edit Delete |

- This brings you to the **Add Notification** screen. Please change the field on this page to suit what notification you would like to create.
 - **From Status** - You can select the status the grant use to be in to trigger the notification.
 - **To Status** - You can select the status the grant got changed to trigger the notification.
 - **Message Template** - The email which will be sent.
 - **Recipients** - Allows you to pick who you would like to receive the notification.
 - **Grant Administrators** - All of the members with grant administrator access.
 - **Grant Users** - All of the members with grant user access.
 - **Grant Club Contact** - The contact on the grant who is from the Club.
 - **Club Area Governor** - The Area Governor of the Club.

Add Notification

Notification Details

From Status:

To Status:

Message Template:

Recipients:

- Grant Administrators
- Grant Users
- Grant Club Contact
- Club Area Governor

[Cancel](#) [Create](#)

- Once done click **Create**.