

## Online portal notes-based notification workflow

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<b>Stakeholder:</b>	Umbra Shading
<b>Ticket ID:</b>	REQ-I2185
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### Prototype: [Figma link](#)

### Overview

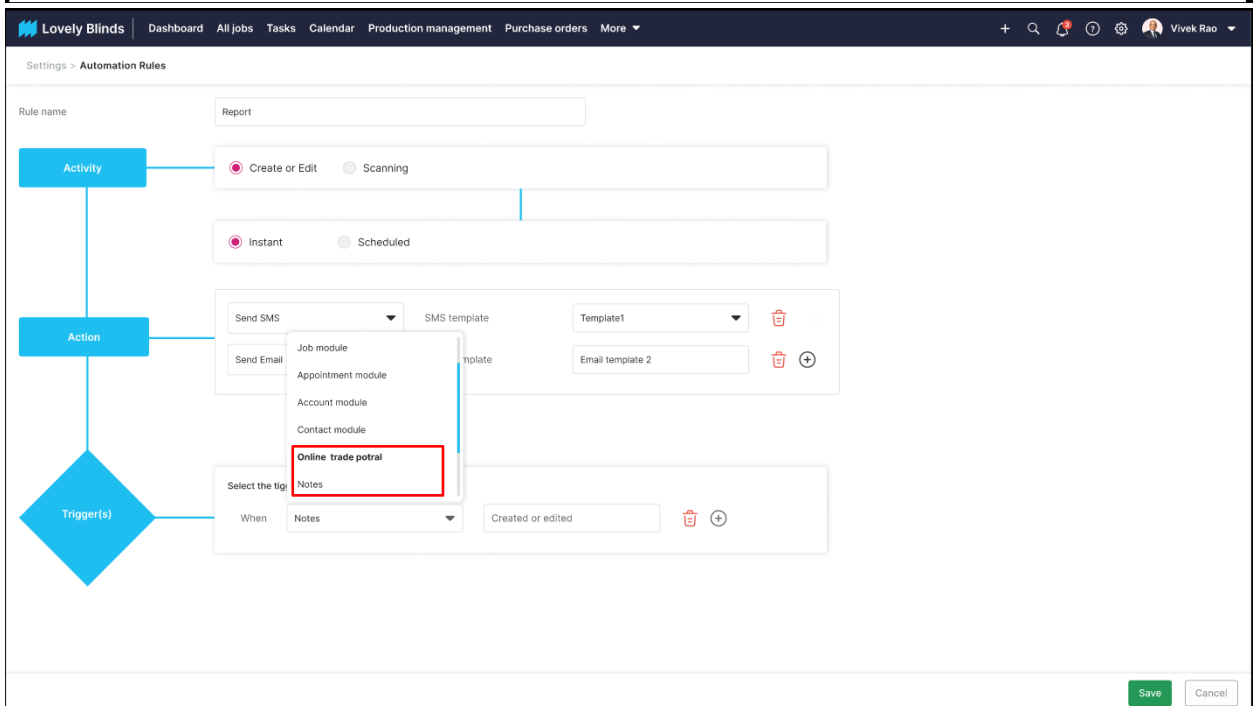
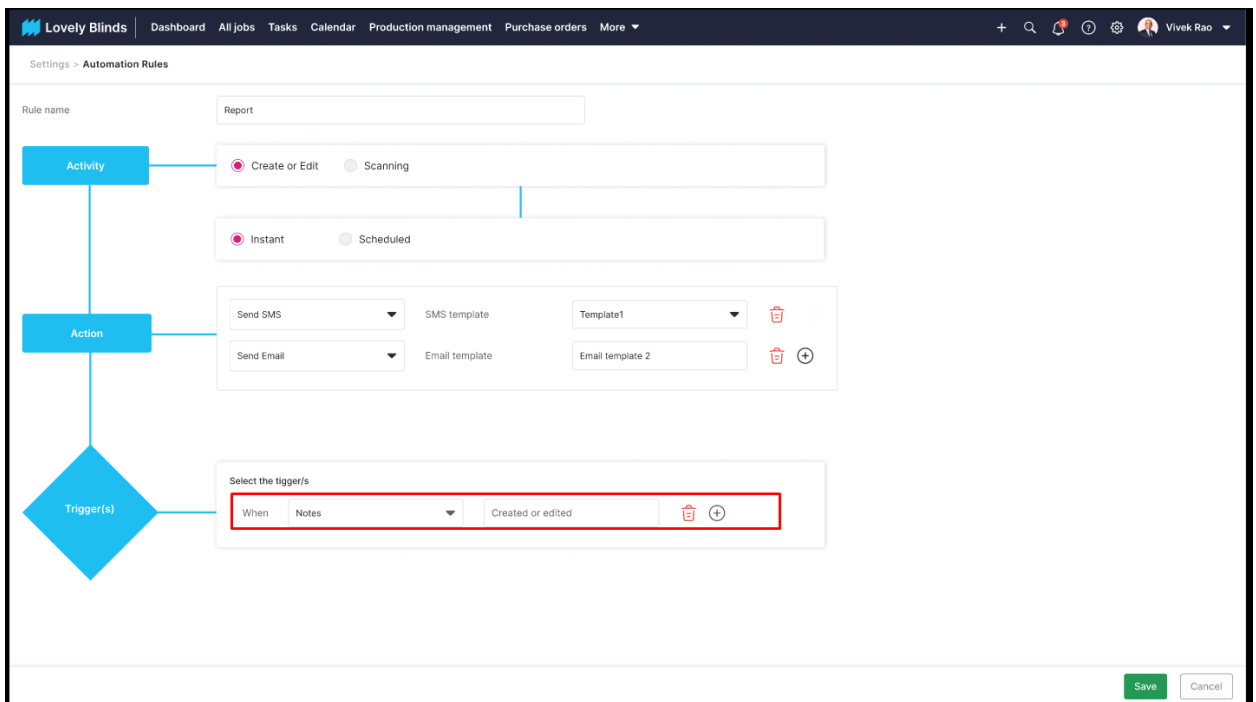
This requirement defines the notification behavior when notes are added or edited in the online portal.

**NOTE:** We should only trigger notification when a trade user adds a note after the job has been submitted.

### Description

- When a **note is added or edited** in the online portal, a **workflow** can be configured to trigger actions.
- Online portal note has been included as an available trigger option within the workflow configuration.
- Based on the **selected notification template**, the workflow should perform one or more of the following actions:
  - Send **Email**
  - Send **SMS**
  - **Update fields**
  - **Add tasks**

- All notifications triggered by these workflows should be displayed under the **notification bell icon** in the navigation bar.



- Clicking on a notification should **navigate the user to the associated module** related to the note.

Lovely Blinds
+ 🔍 🌐 ⚙️ 👤 Vivek Rao

Settings > Automation rules

Rule name	When	Action
<input type="checkbox"/> Job overdue date	Create or edit	Quotes
<input type="checkbox"/> Job close	Create or edit	Send Email = Test one
<input type="checkbox"/> Scheduled sms	Create or edit	Send SMS = SMS template
<input type="checkbox"/> Auto Email	Create or edit	Send Email = Email
<input type="checkbox"/> Auto SMS	Create or edit	Send SMS = SMS template

**Notifications** Mark all as read

SMS   Email   **Task 4**   Calendar   Updates

- Antonia anders**

Antonia create a new task collect payment from customer, create a new task collect Antonia create a new task Antonia create a new ta

Jan 23
- Tenny Rogers**

Tenny has added notes on the online portal

Jan 23
- Antonia anders**

Antonia create a new task collect payment from customer.

Jan 12
- David Paul**

Don create a new task collect payment from customer.

Jan 10
- Jenny wilson**

Jenny wilson create a new task collect payment from customer.

Jan 08
- Jacob Jones**

Jacob jones create a new task collect payment from customer.

Jan 03