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:

Examples:

| Event	Attribute	Value	Subject (Subject of letter)	Body (Letter's text)
Transaction creation	-	-	Transaction in %{new_tran_sale} is created	Issue: %{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}. Updates: Status = Fact.
Transaction update	Status	Plan	Transaction in %{new_tran_sale} is updated	Issue: %{new_tran_sale}. 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:
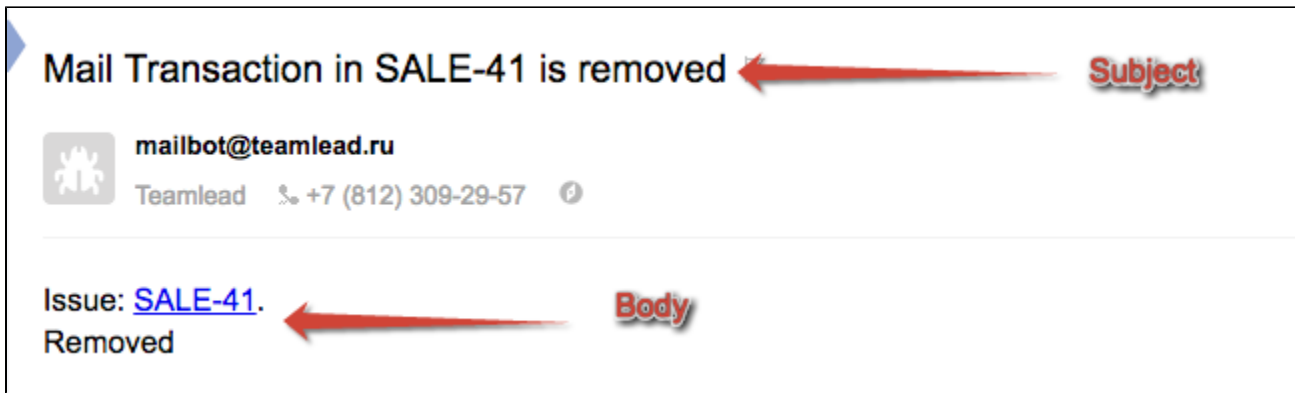
Add Event to Notification scheme

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.
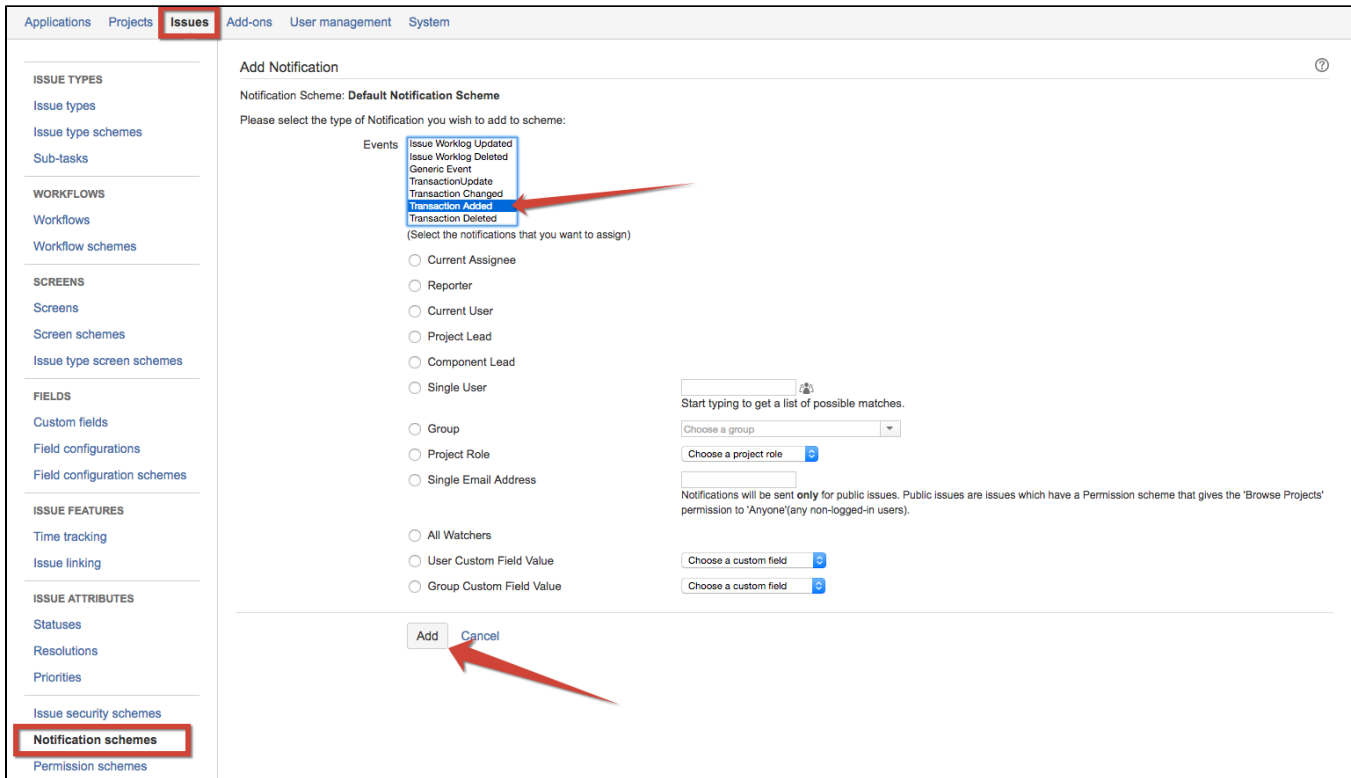
In this case an email will have standard notification view:

Mail (SALE-43) multiple product select ← Issue Summary

Admin <mailbot@teamlead.ru>
Teamlead   ☎ +7 (812) 309-29-57   ⓘ

Issue link →

[http://jira-test.teamlead.ru/browse/SALE-43?page=com.atlassian.jira.plugin.system.issuetabpanels:all-tabpanel]

Admin updated SALE-43:
----------------------   Changes in transaction
    Transactions CRM: transaction changed. Status = Plan. Sum = 500.00 (was: transaction added. Status = Fact. Sum = 500.00)