Version 7 Tutorial for

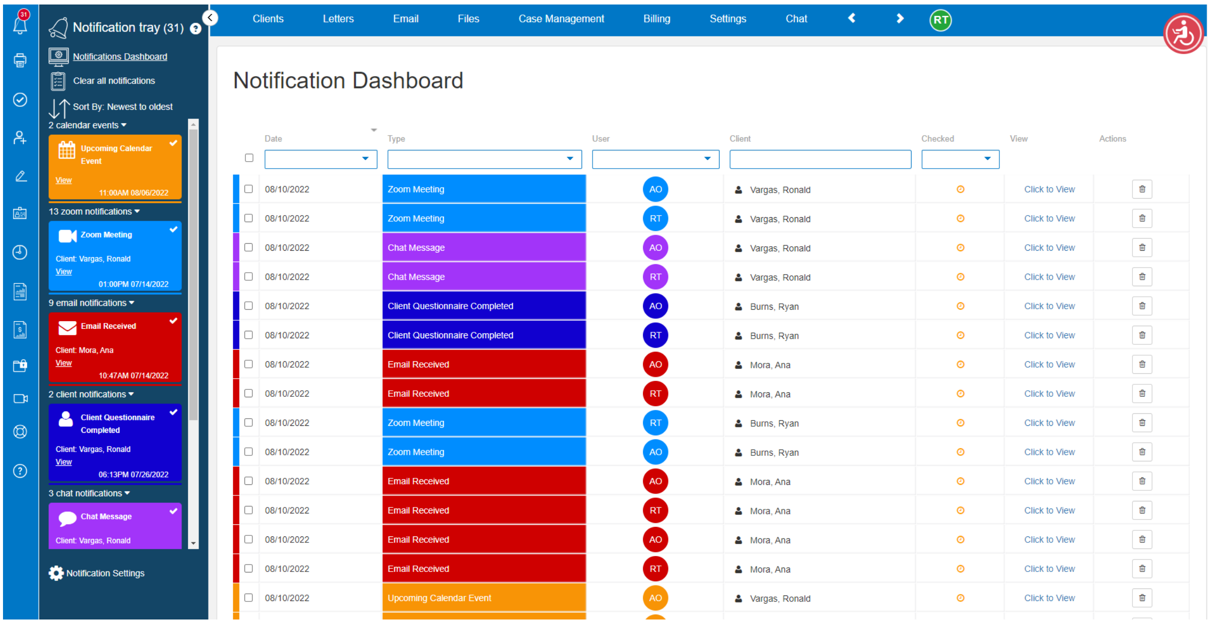
Notification System

September 2022

Index

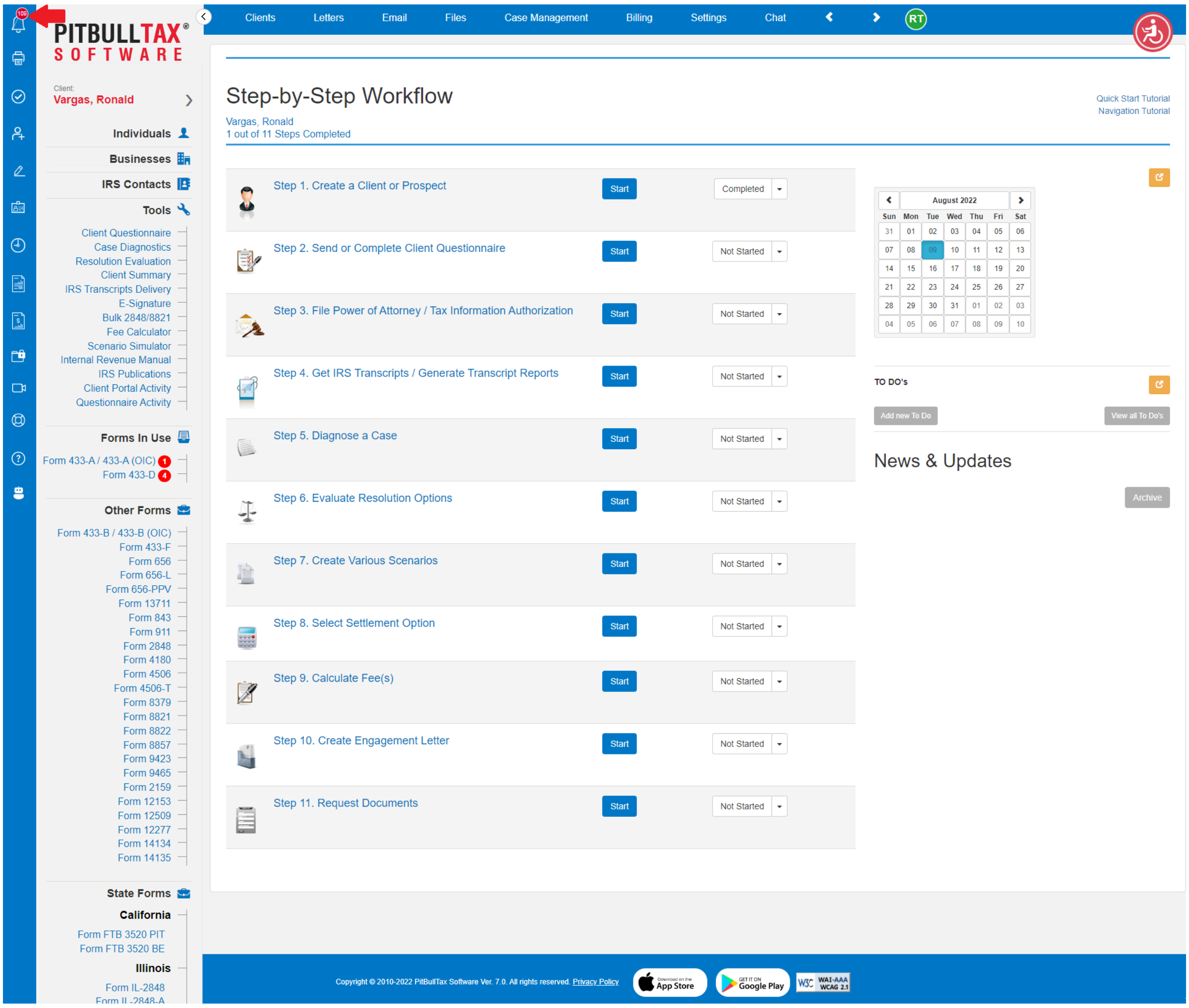
1. Introduction to the Notification System functionality

Notifications and alerts can further facilitate the use of PitBullTax Software. They will allow you to stay on top of your upcoming events and tasks. This tutorial goes over on the implementation of a **color coded notification tray, alerts, notification dashboard and notification settings** for the Notification System.

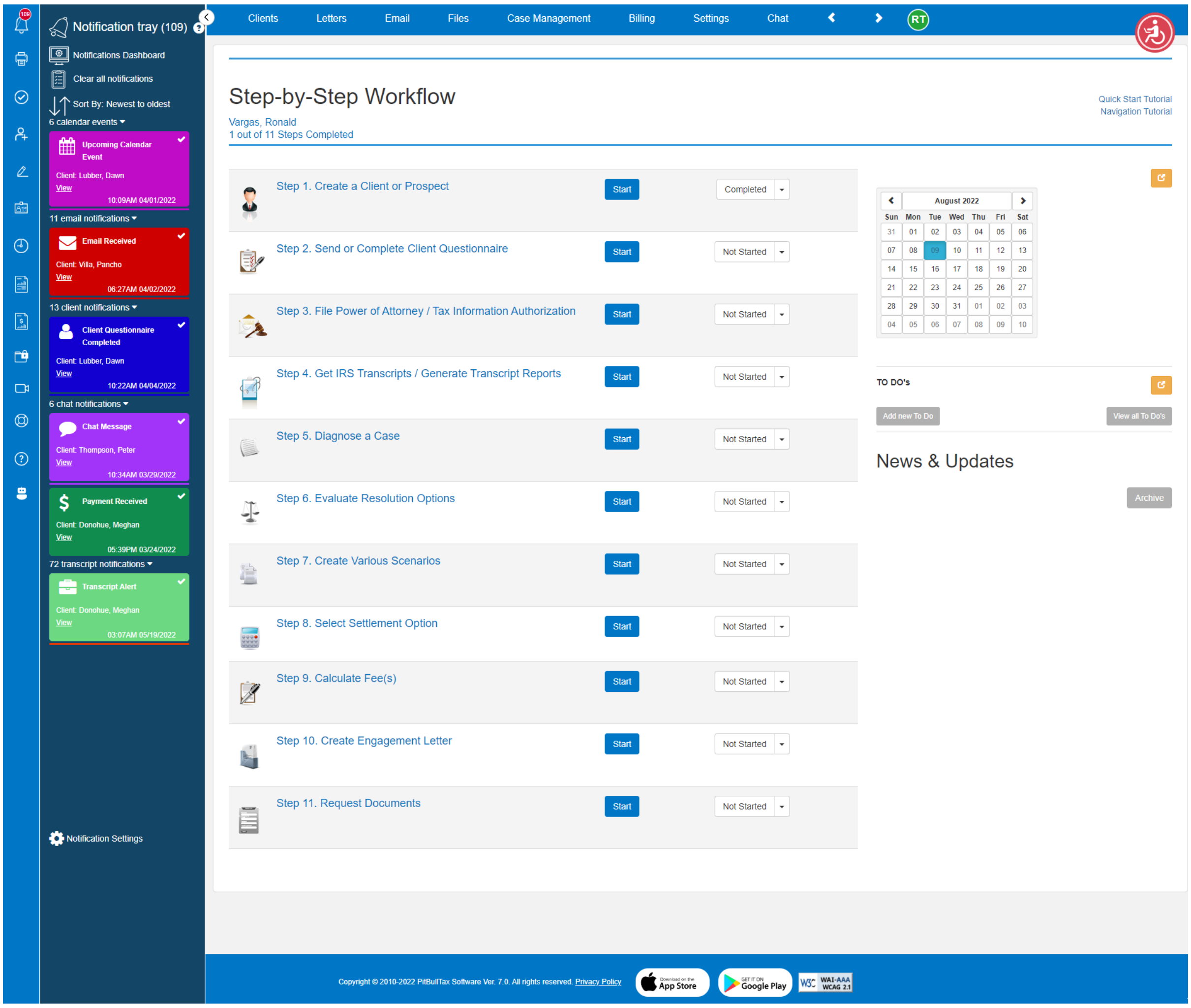


2. How to open the notification tray

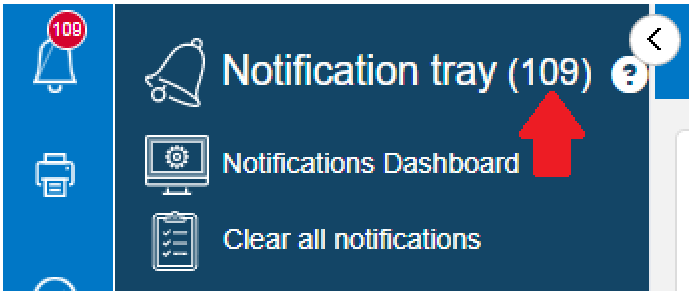
There is a bell icon at the top left corner of the blue menu bar. This bell icon has a red circle with the number of notifications that are waiting to be opened.



When the User clicks on the bell icon, the Notification Tray **will open.**



In this example the User has 109 notifications pending. To close the notification tray there is an arrow that points to the left next to the title. When the User clicks on this button the notification tray closes.

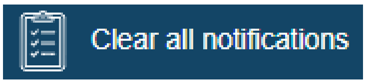


3. How to read the notification tray

- 1. The notification tray title has at the right side in parentheses the number of notifications that have arrived and are waiting to be checked (for this example 109 notifications are waiting to be opened).

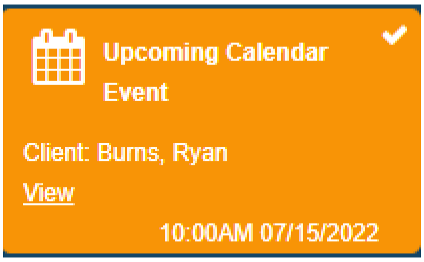
- 2. Notifications Dashboard: Clicking on this button will take you to the Notifications Dashboard.

- 3. Clear all notifications: when you need to remove all notifications just click on this button.

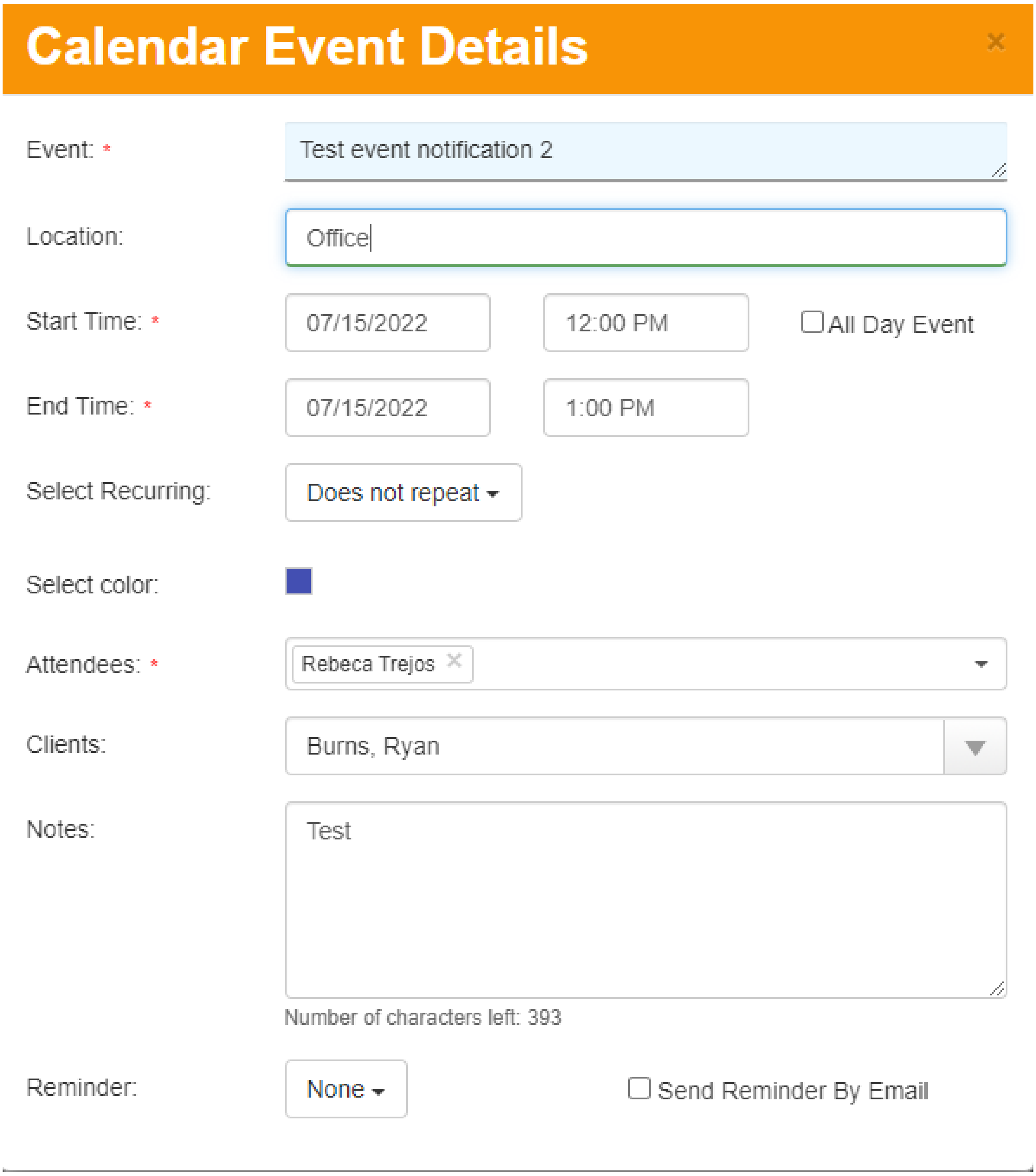


- 4. Filters: With these filters, you will be able to view the notifications sorted by the newest to oldest or vice versa.

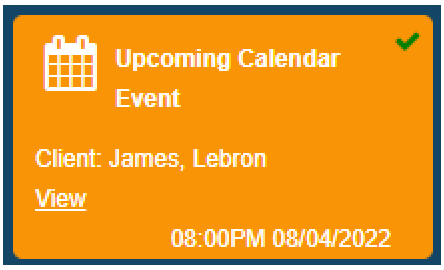
- 5. Upcoming Calendar Event notification type. It has the "View" option to see the Calendar Event Details.



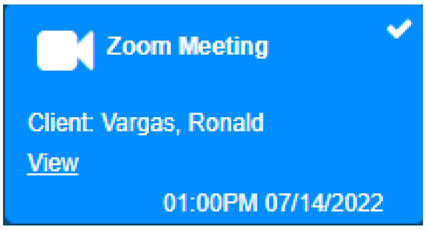
When you click the “View” button, the Calendar Event Details window is displayed.



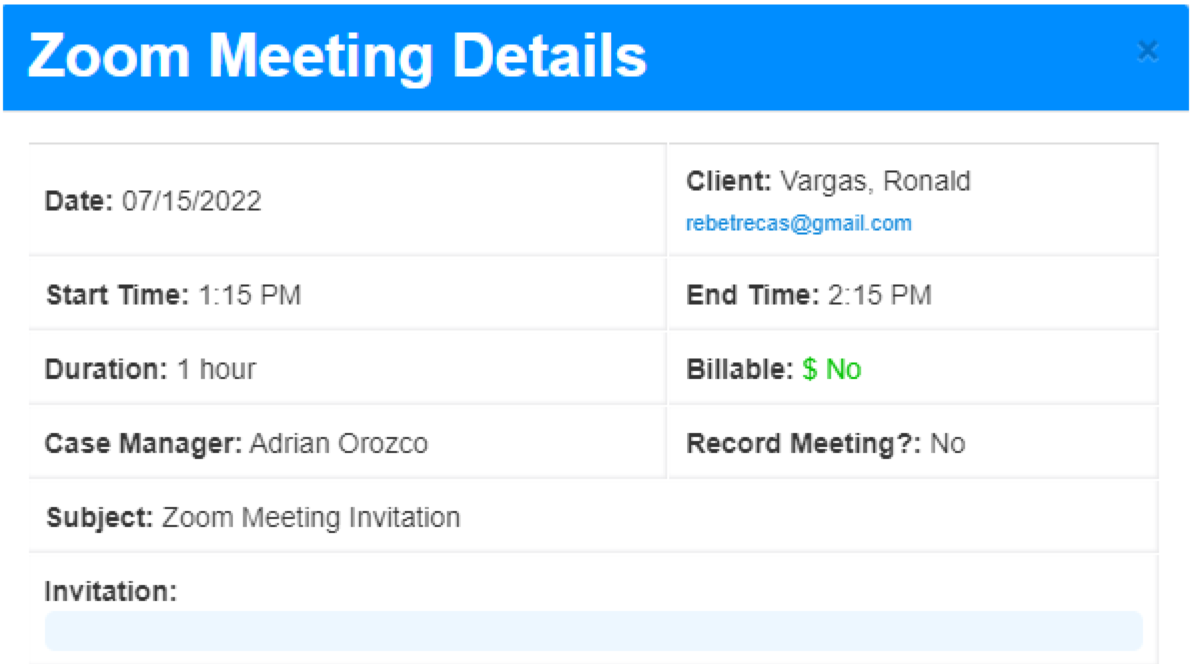
If you click on the Checkmark it will turn green and then will disappear from the Notification Tray.



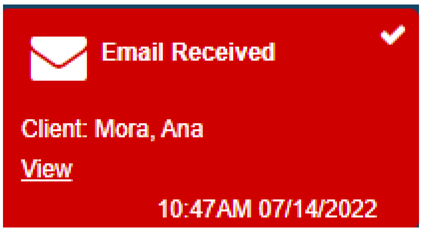
- 6. Zoom Meeting notification type. It has the "View" option to see the Zoom Meeting Details.



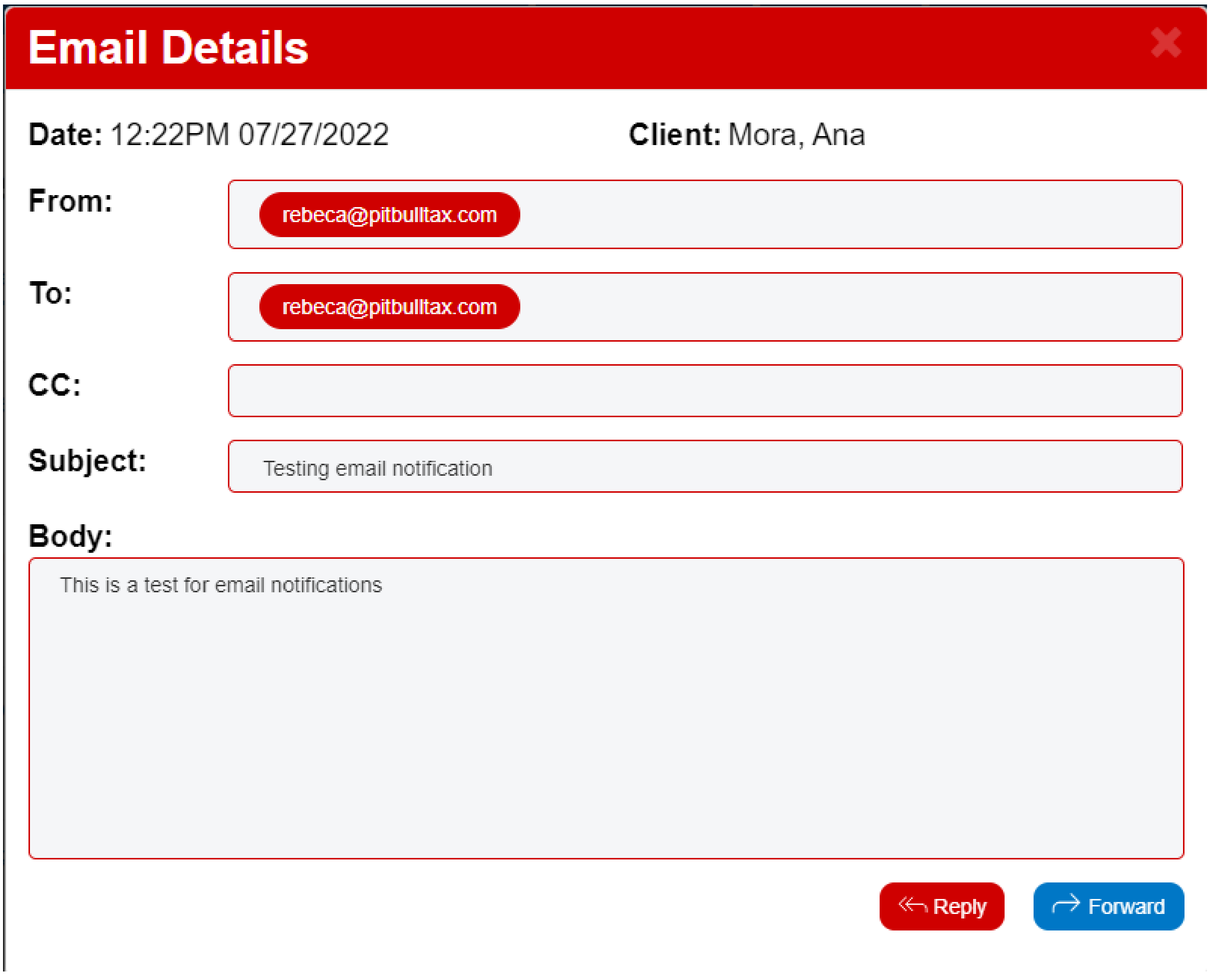
When you click the "View" button, the Zoom Meeting Details window is displayed.



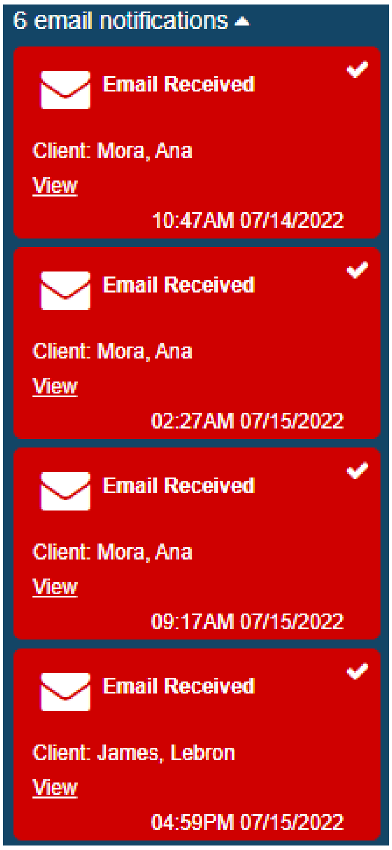
- 7. Email Receive notification type. It has the "View" option to see the Email Details.



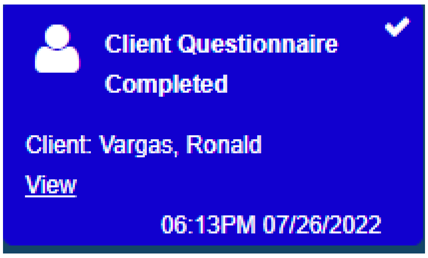
When you click the “View” button, the Email Details window is displayed, here you can Forward or Reply the email.



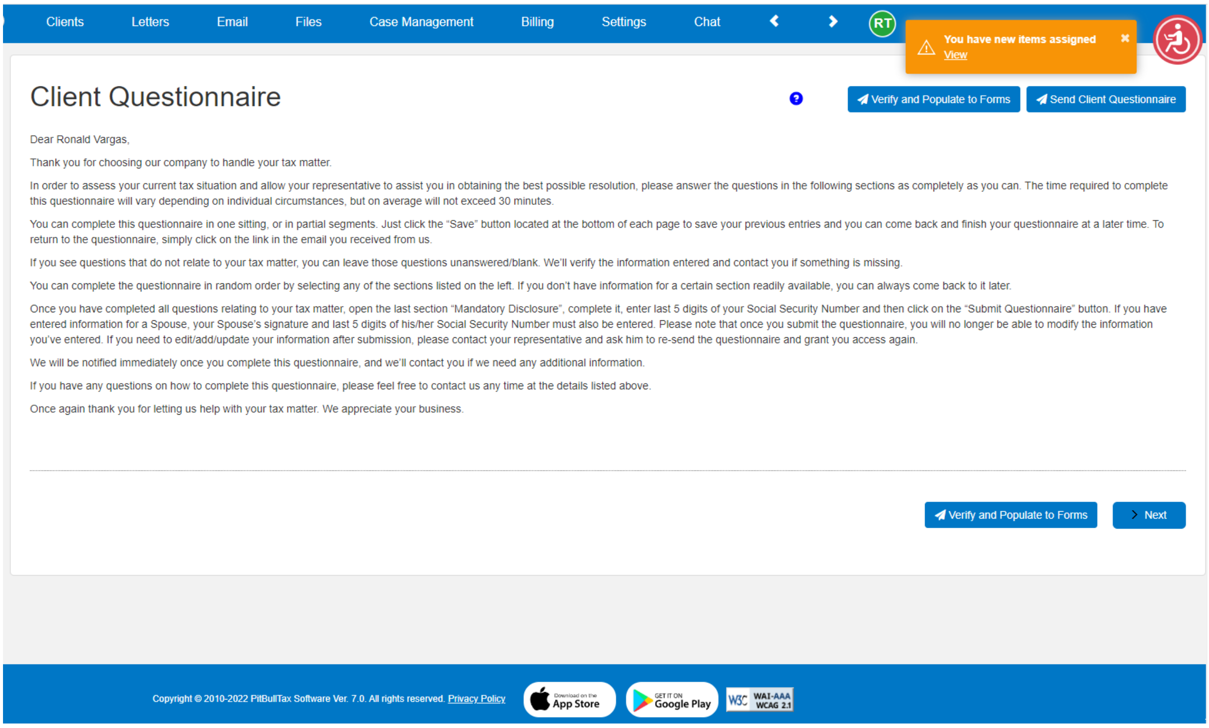
If there are several nested notifications, they can be displayed by clicking on the title "6 email notifications" (for this example). The User can collapse the nesting and uncollapse by clicking on the title.



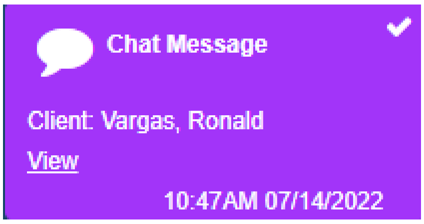
- 8. Client Questionnaire Completed notification type. It has the "View" option to see the Email Details.



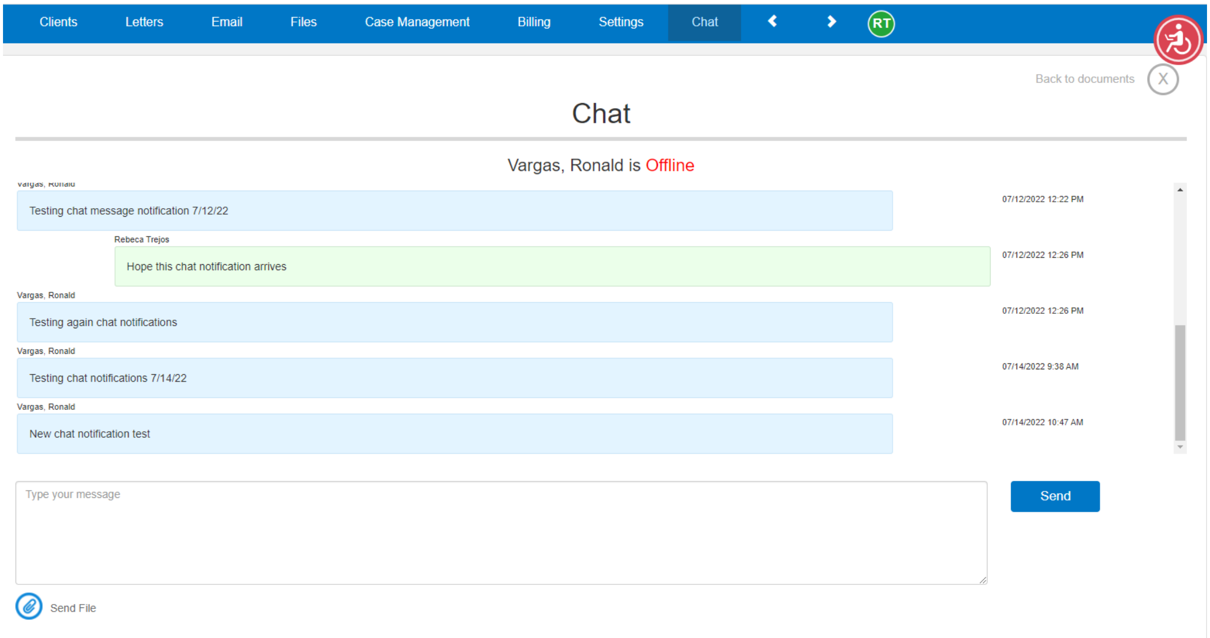
When you click the “View” button, the Client Questionnaire window is displayed.



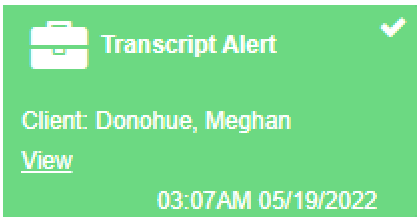
***9. Chat Message notification type**. It has the “View” option to see the Chat Details.



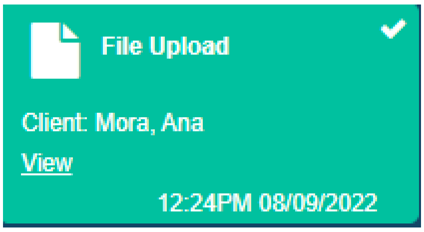
When you click the “View” button, the Chat window is displayed.



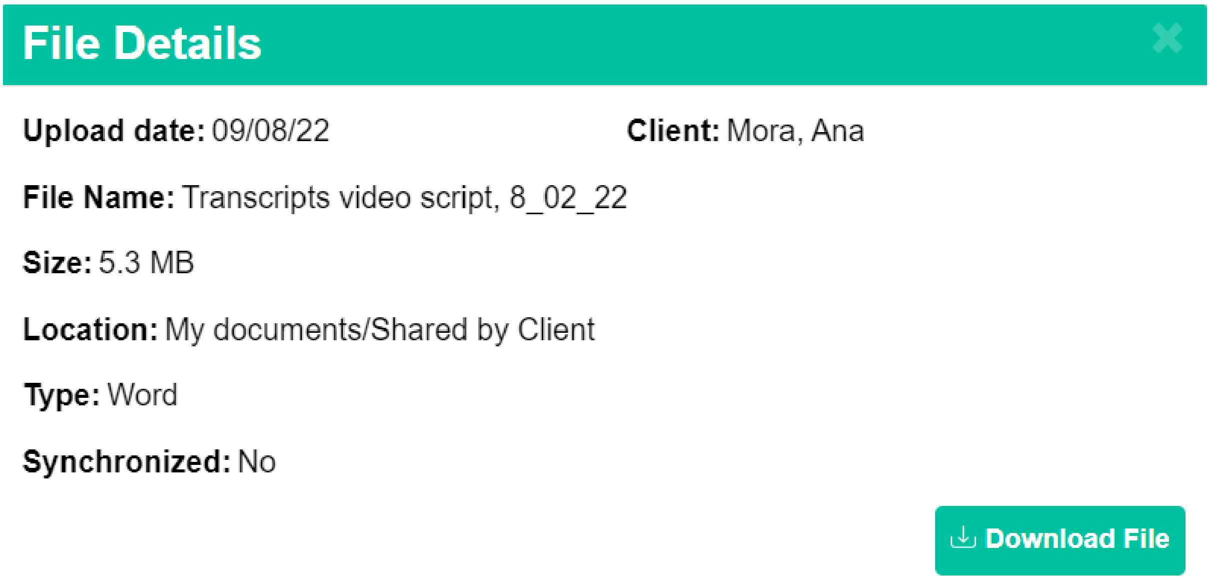
*10. **Sixth notification type** in the notification tray is: New Transcript received. It has the “View” option to see the new transcript received, the client's name, date and hour when the notification is generated.



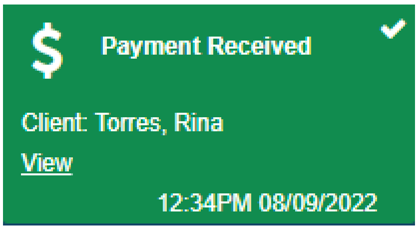
- **11. File Upload notification type.** It has the “View” option to see the File Upload details.



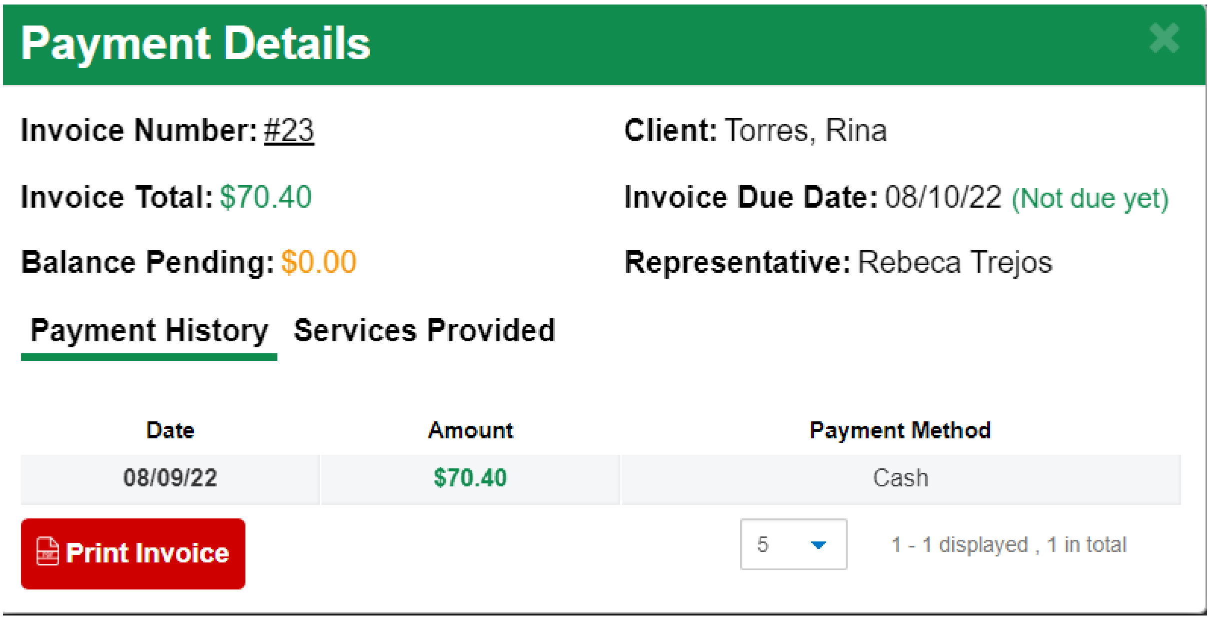
When you click the “View” button, the File Details window is displayed where you can Download the File.



-12. **Payment Received notification type.** It has the "View" option to see the Payment Received details.

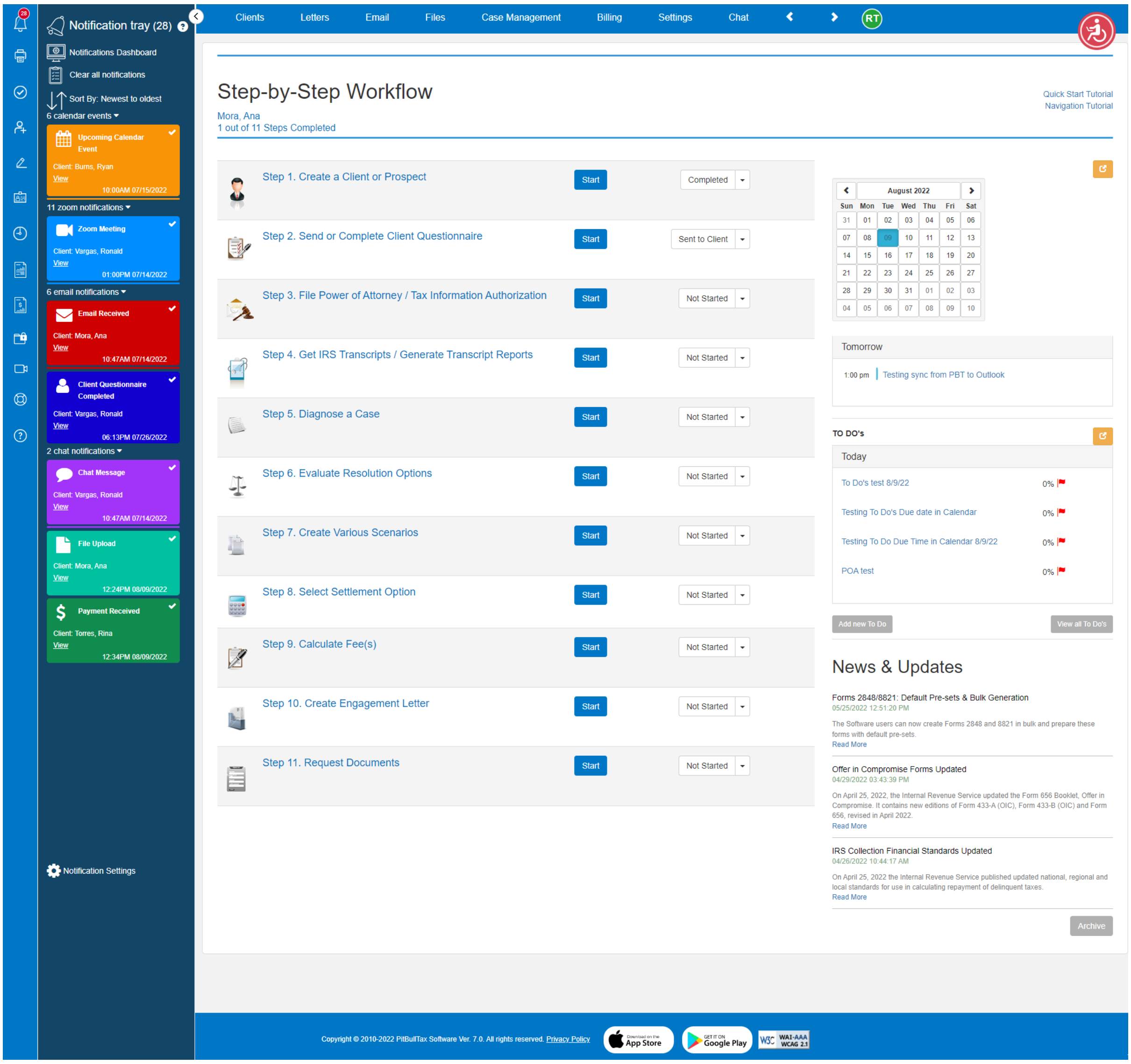


When you click the "View" button, the Payment Details window is displayed where you can Print the Invoice..



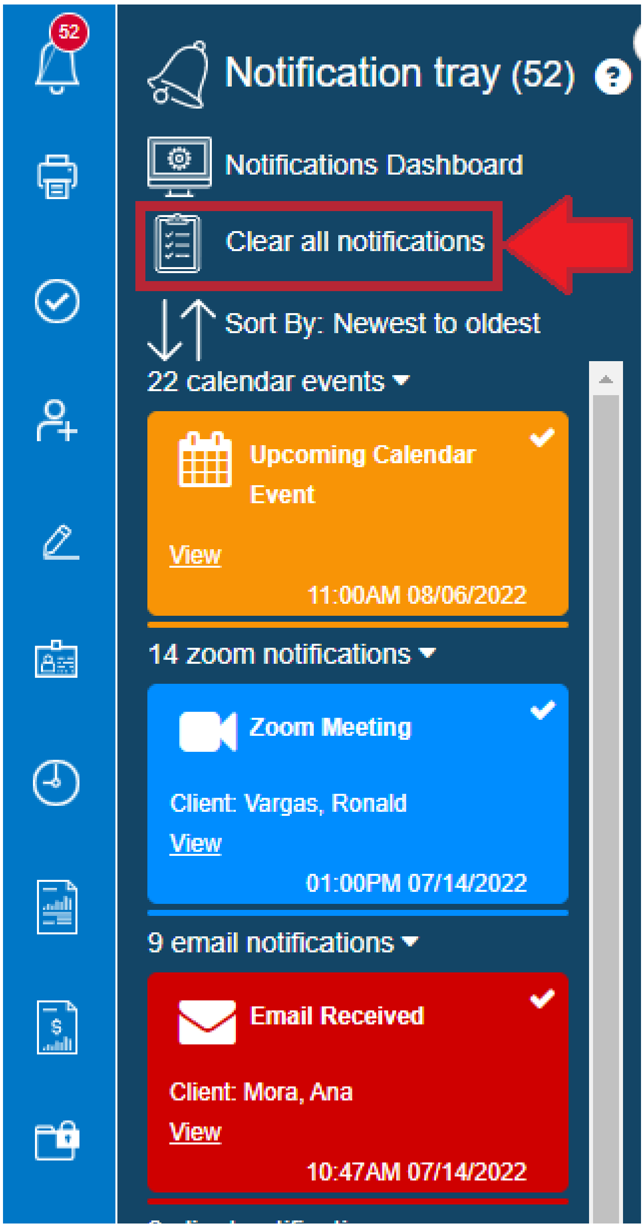
- 13. Notification Settings: At the bottom of the notification tray there is a button to access the Notification Settings:

This is how the Notification Tray looks when it has several notifications.

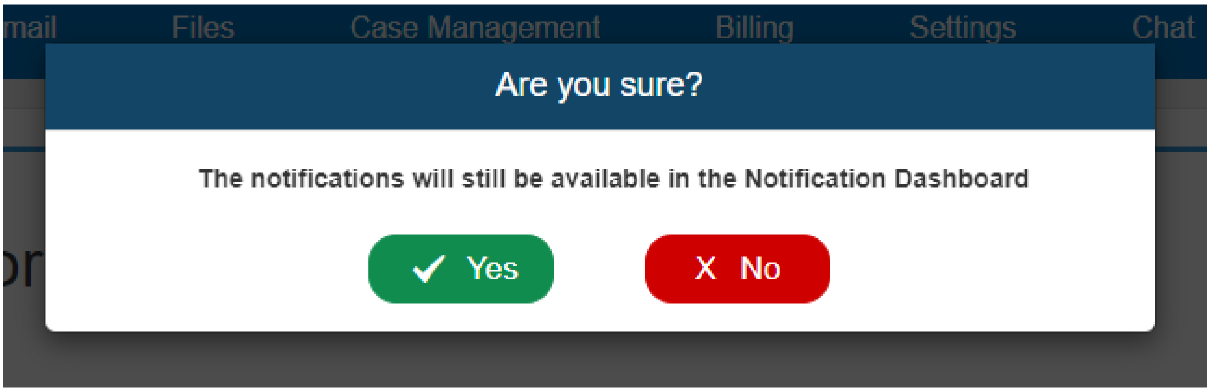


4. How to clear the Notification Tray

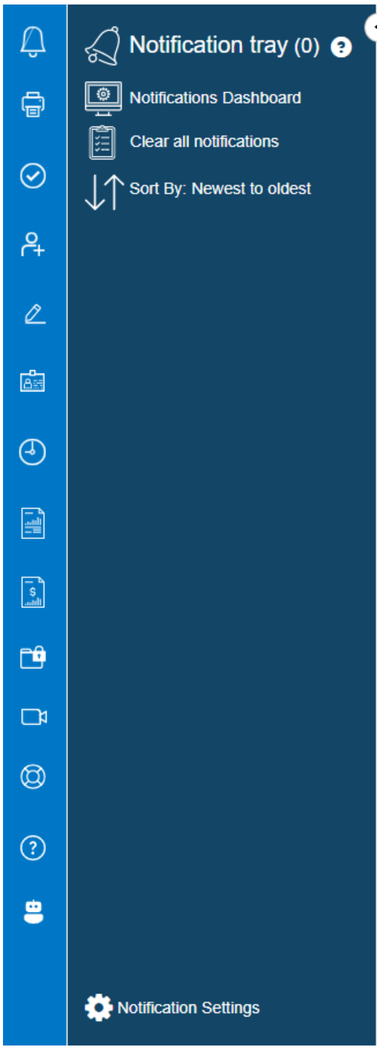
In order to purge the Notification Tray, just click the "Clear all notifications" button located under "Notifications Dashboard" button.



When you click this button, the system displays a confirmation bubble with Yes/No options besides the warning that the **notifications will still be available in the Notification Dashboard.**



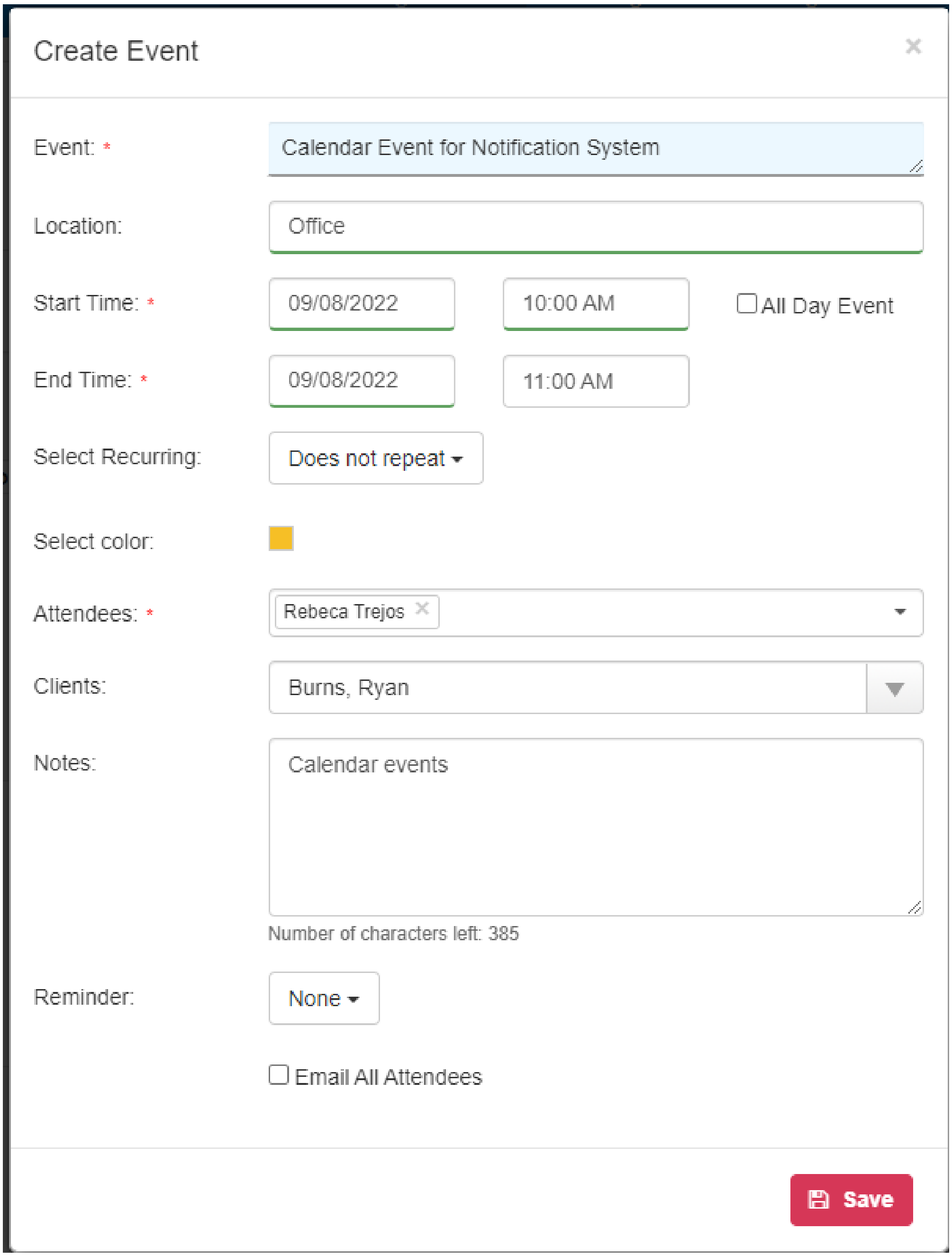
Clicking “Yes” will clear all notifications in the Notification Tray.

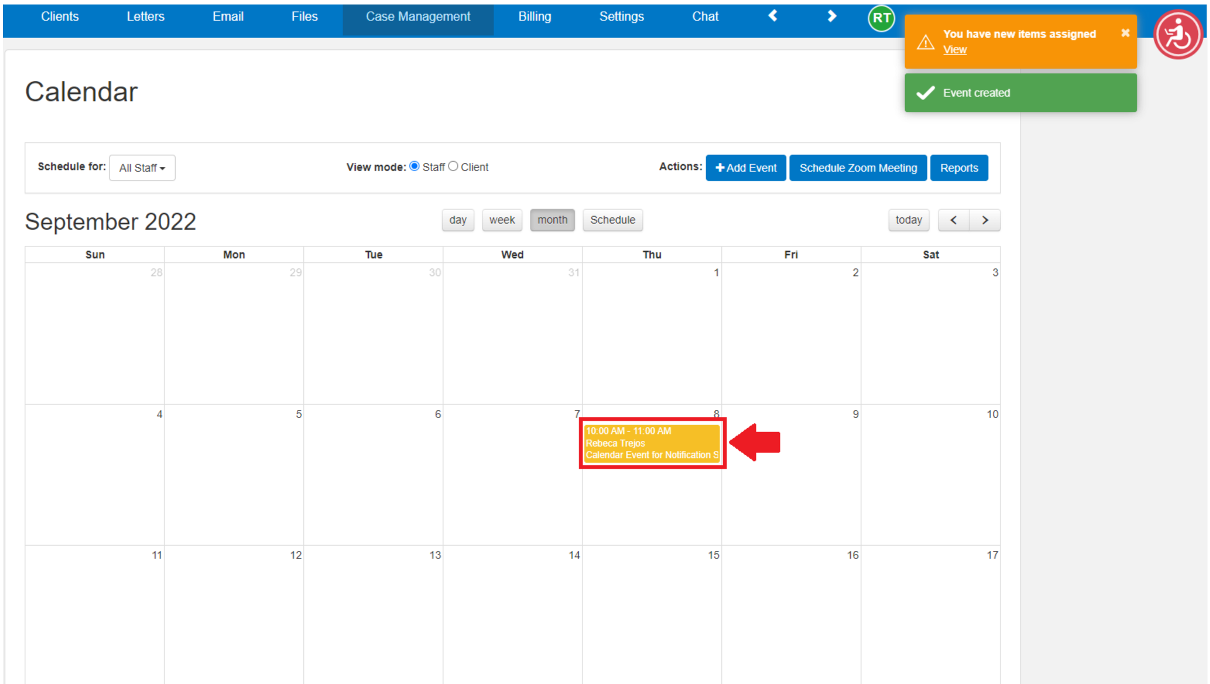


5. Triggers for each Notification type

1. Upcoming calendar event:

The trigger for the upcoming calendar event happens when the user schedules an event in the calendar. The notification is generated a certain amount of time before the event begins. The User is able to choose how much time of anticipation they want for the notification to be generated in **Notification Settings**.

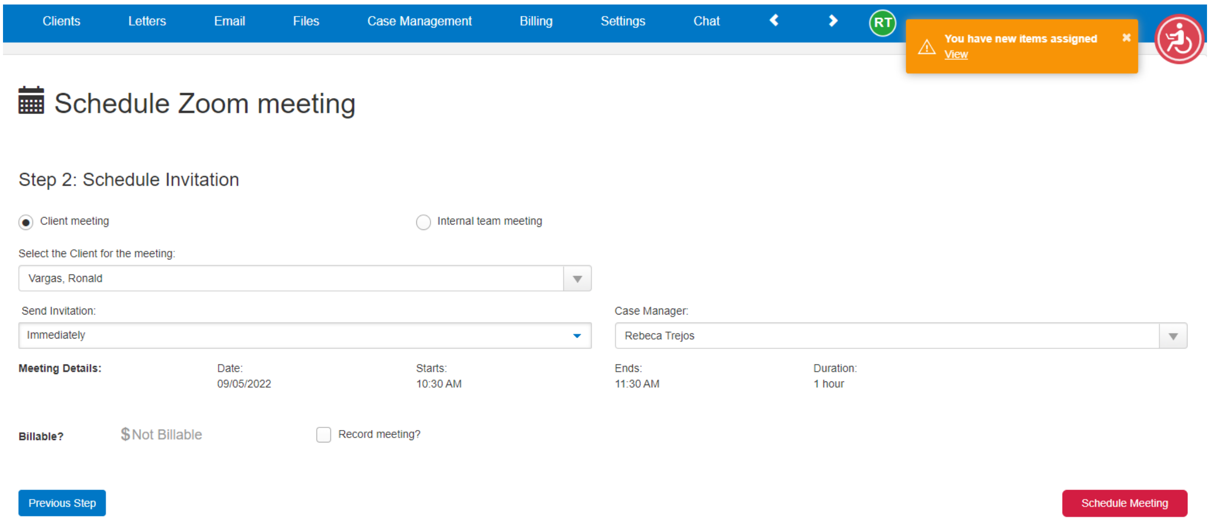


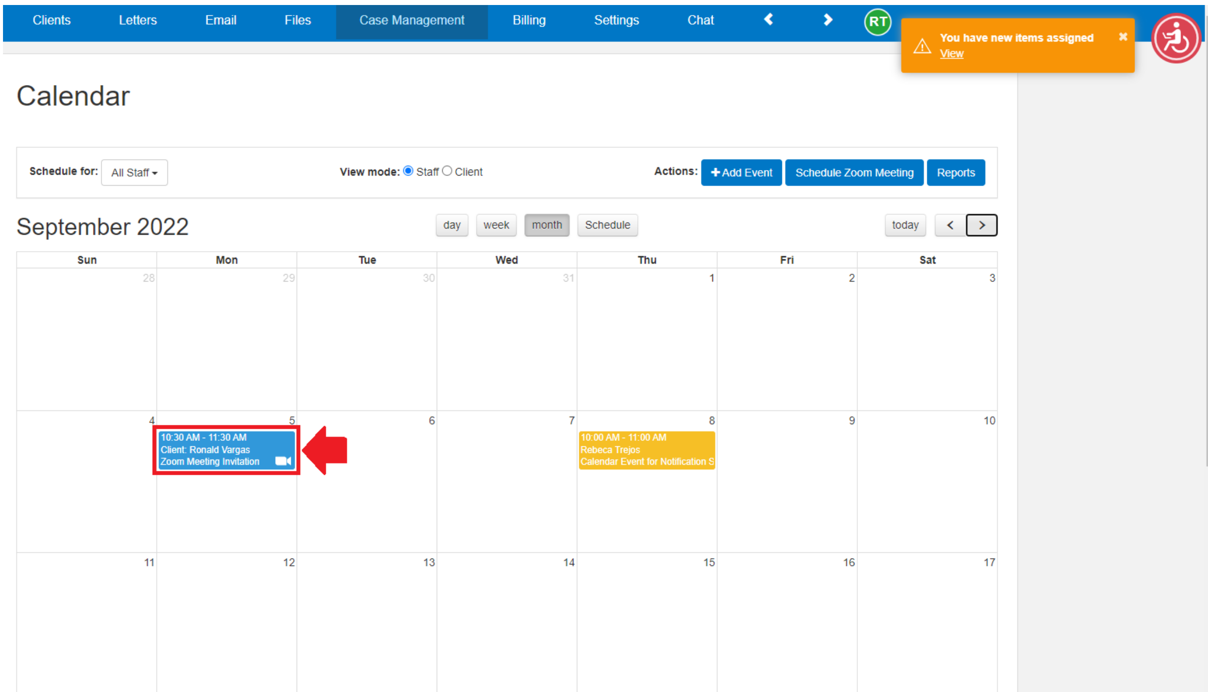


Clients
Letters
Email
Files
Case Management
Billing
Settings
Chat
RT
You have new items assigned
View
Event created
Calendar
Schedule for:
All Staff
View mode:
Staff
Client
Actions:
+ Add Event
Schedule Zoom Meeting
Reports
September 2022
day
week
month
Schedule
today
Sun
Mon
Tue
Wed
Thu
Fri
Sat
10:00 AM - 11:00 AM
Rebeca Trejos
Calendar Event for Notification S

2. Zoom meeting:

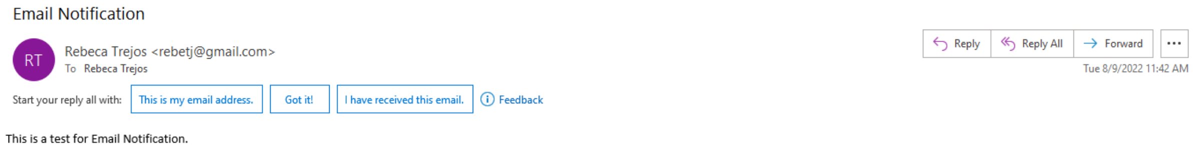
The trigger for the Zoom Meeting happens when the user schedules a Zoom meeting.





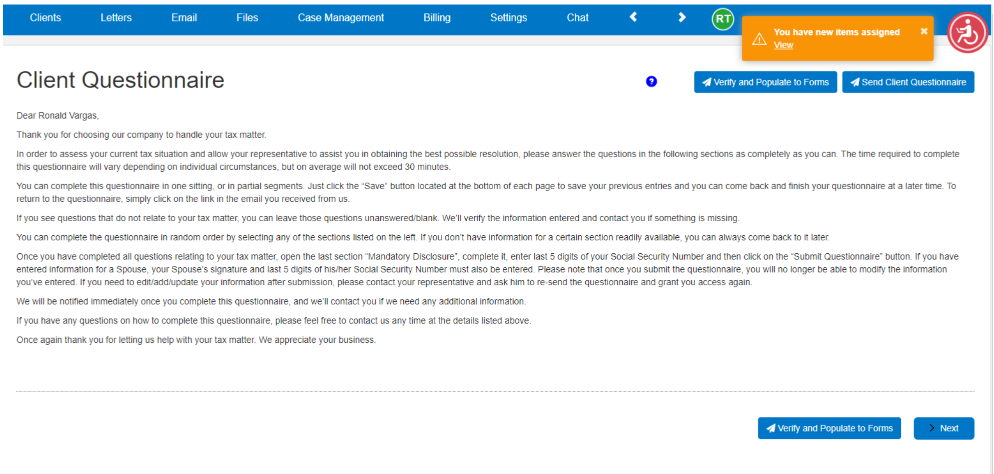
3. Email received:

The trigger for Email received happens when the user receives a new email from a client in the inbox.



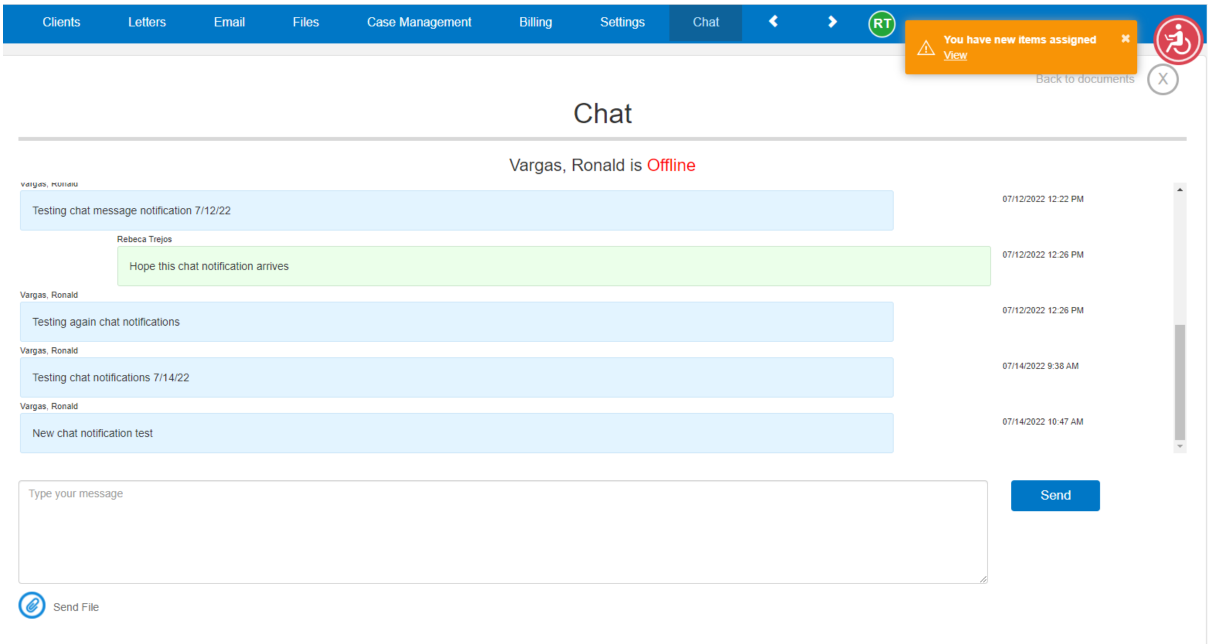
4. Client Questionnaire completed:

The trigger for the Client Questionnaire completed happens when the user's client receives the Client Questionnaire in their mailbox and they have completed the instance of the Questionnaire that was sent. Each time someone completes a Client Questionnaire a Notification is generated.



5. Chat message:

The trigger for the Chat message notification happens when one of the clients sends a message to the user through the client portal and the user has not seen it, therefore this notification is generated.

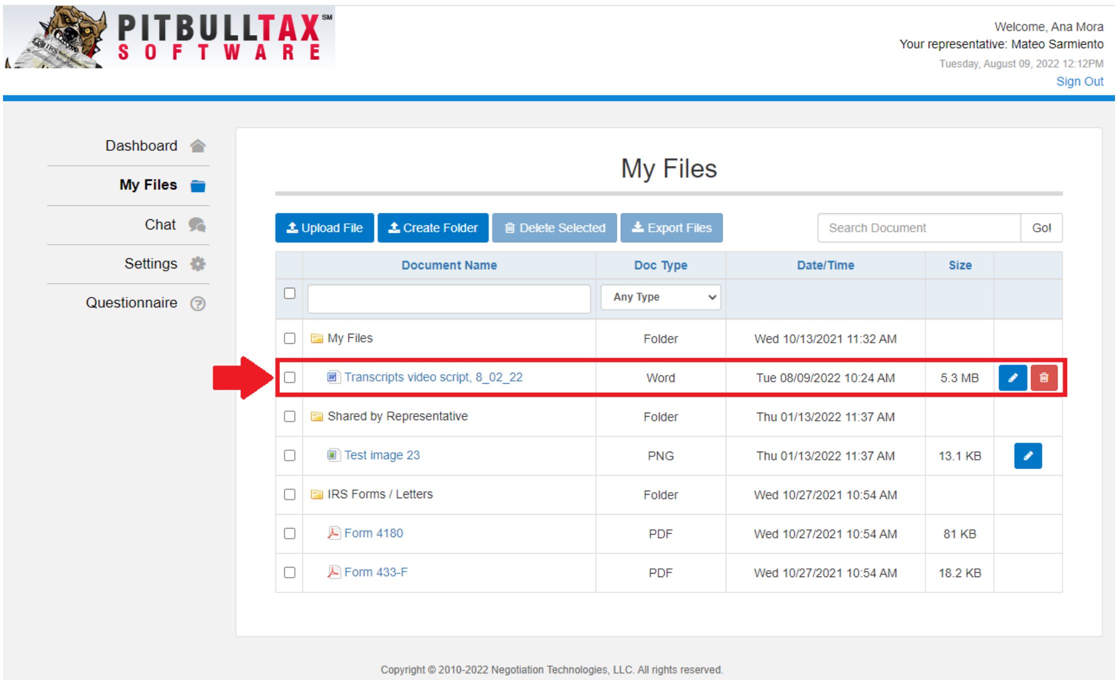


6. New Transcript received:

The trigger for the new transcript received notification happens when the User receives a new IRS Transcript. **(Agregar imagen)**

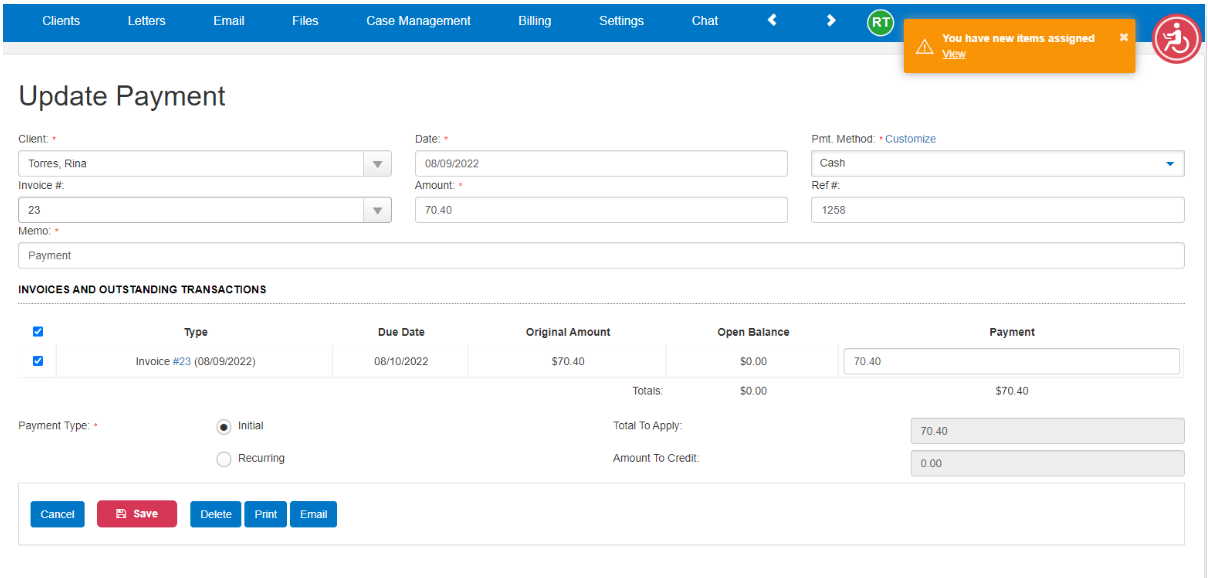
7. A client has uploaded a file:

The trigger for an uploaded file by the client happens when the client uploads a file through the Client portal.



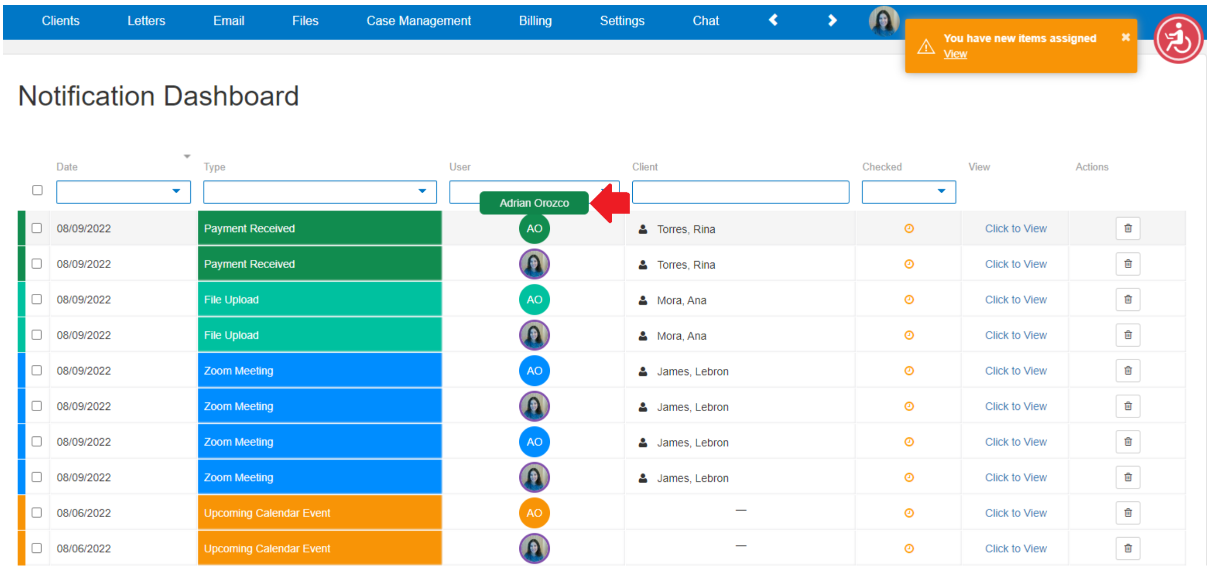
8. Payment received:

The trigger for the Payment Received notification happens when the PitBullTax system detects that an invoice has received a payment. For each payment registered for any invoice, there will be a notification.



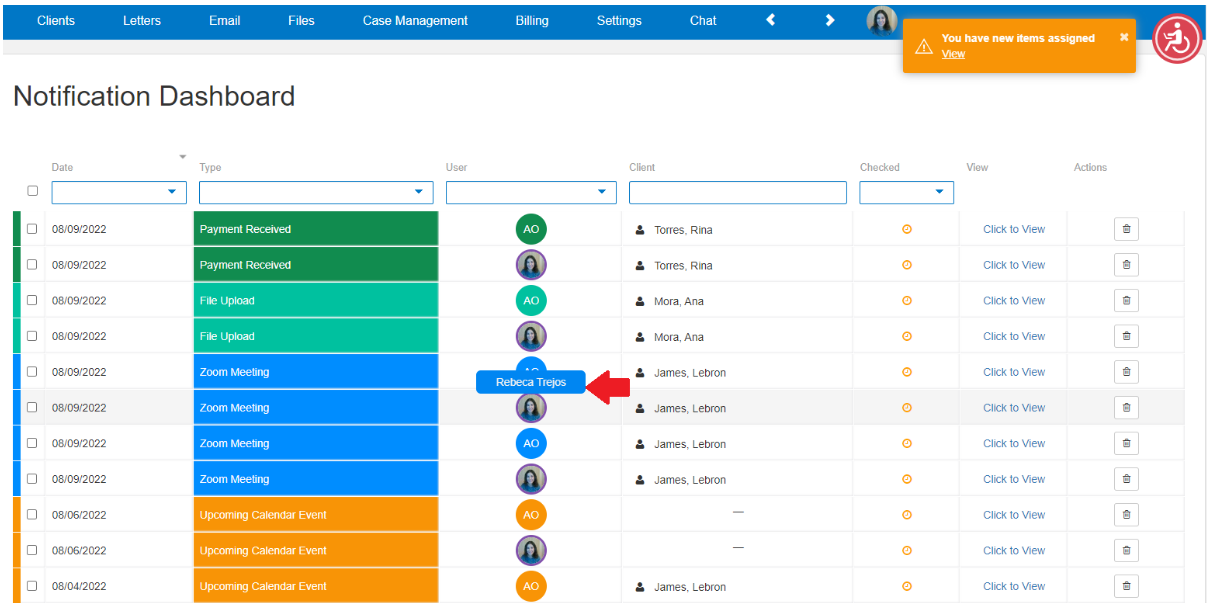
6. How to read the Notification Dashboard

The Notification Dashboard includes the following data and its respective filter:
- **1. Date:** it is the receiving date of the notification.
- **2.Type:** it is the type of notification. This document describes 8 types of notifications. **Notice that the type column color depends on the type of notification. The purpose is to allow color coding for users and improve the readability of the Dashboard.**
- **3. User:** it is the case manager represented by his/her picture, and is who receives the notification. When the User hovers over the User bubble the name of the User appears in a pop up:

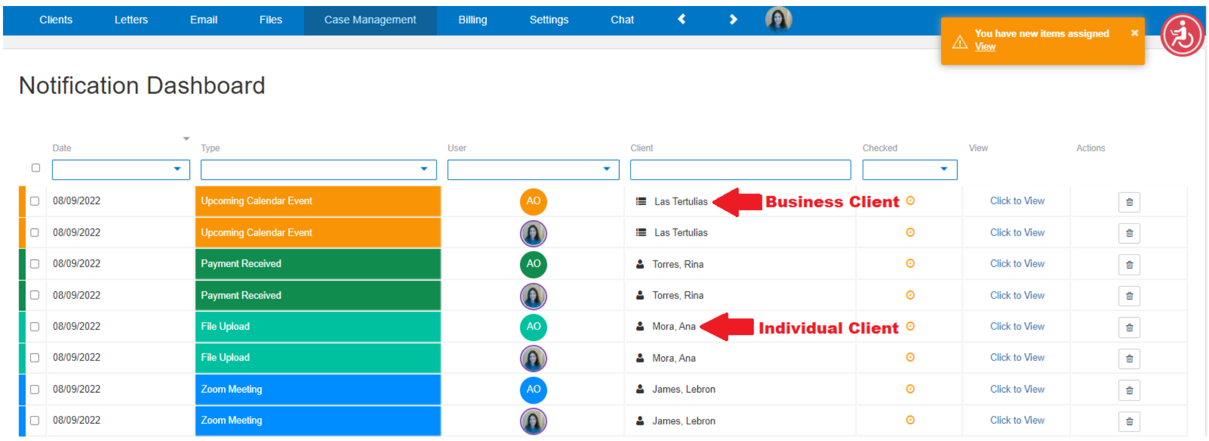


In this example the User doesn't have a profile picture. If this happens the User bubble is represented with the initials of the first and last name of the representative (Adrian Orozco = AO).

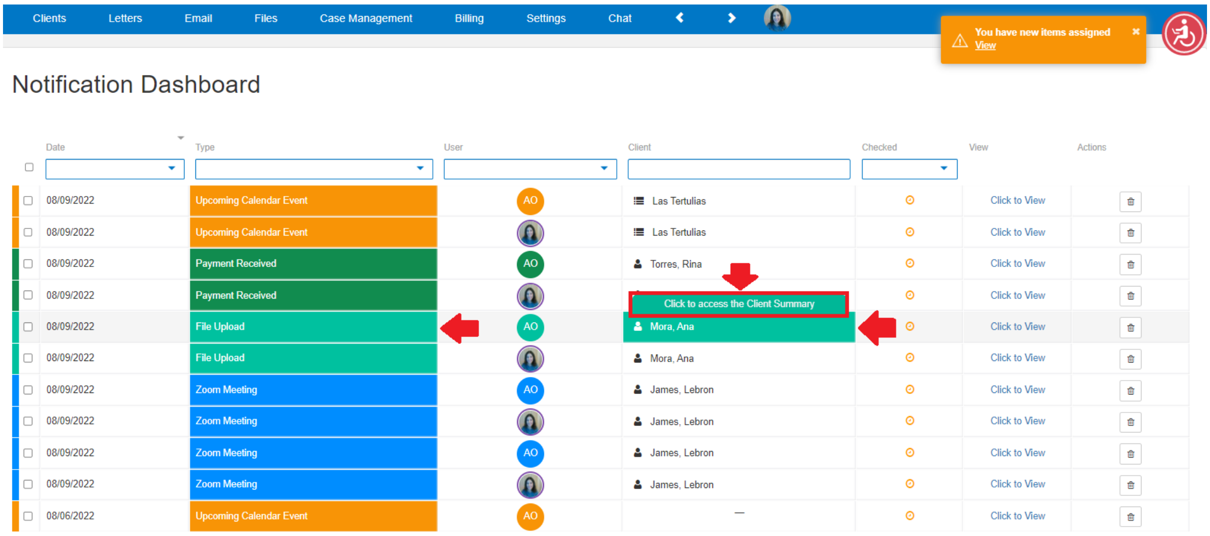
In this next example the User has a profile picture, when the User hovers over it looks as the following example:



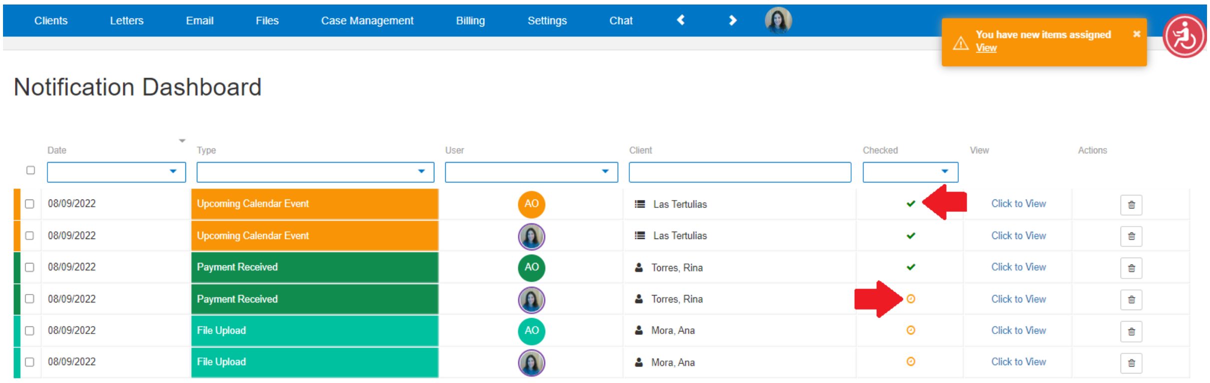
- 4. Client: it is the client associated with the notification. Next to the client's name there is an icon representing if it is a Business or an Individual client. For example, the following image shows the Individual and Business clients respective icons:



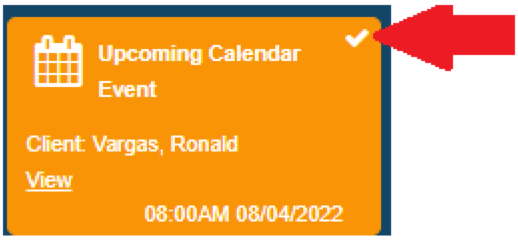
When hovering over the client name, a pop up text appears that indicates this is a shortcut to the Client Summary. The highlight color is the same as the notification type.



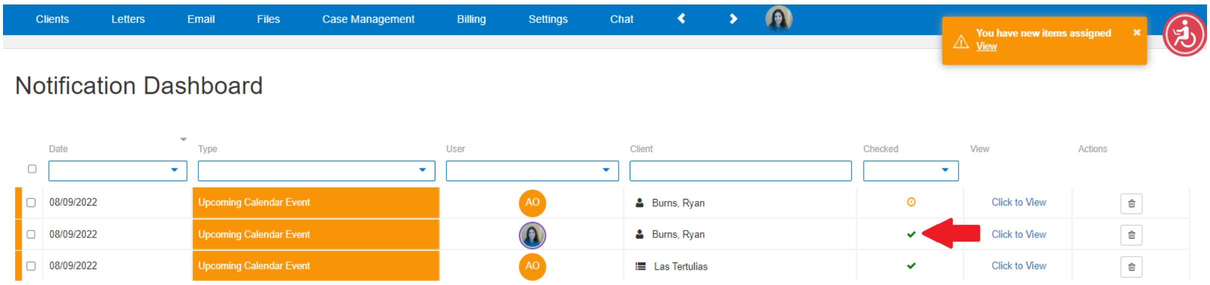
5. Checked: check mark means that the user has already checked the notification, and the clock means that the user hasn´t checked the notification.



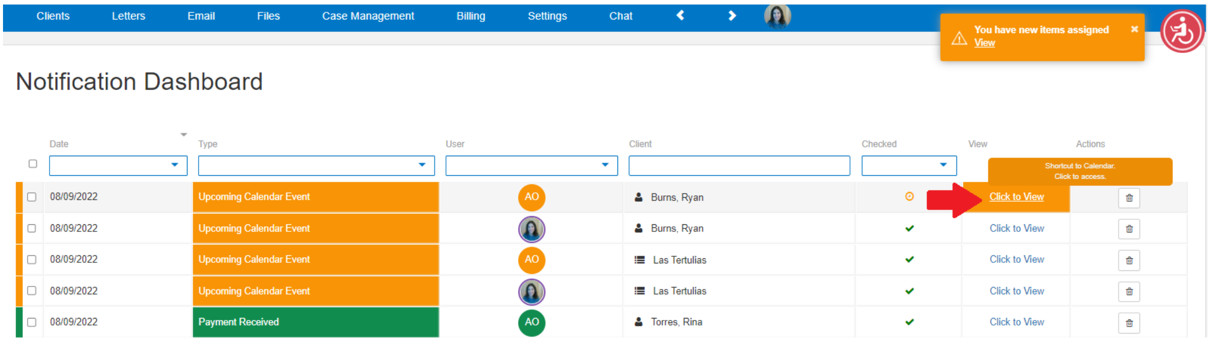
Notice that next to each notification box in the Notification Tray, there is a check mark, clicking on this check mark the Checked column updates its value and the notification is removed from the Notification Tray..



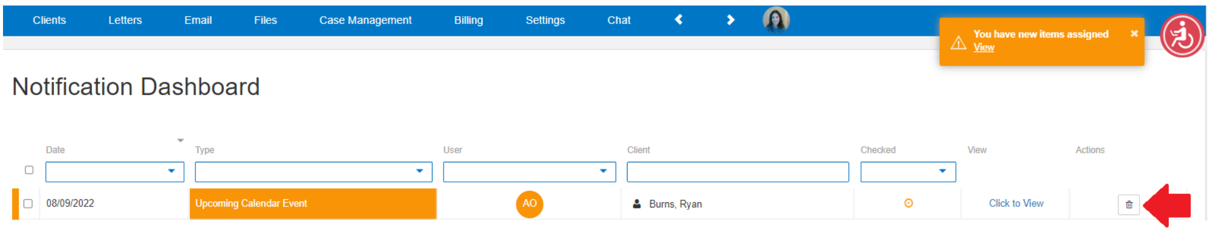
The checkmark at the top right corner is the trigger to mark a notification as checked in the Notification Dashboard.



6. View: it is the option to view the notification details.

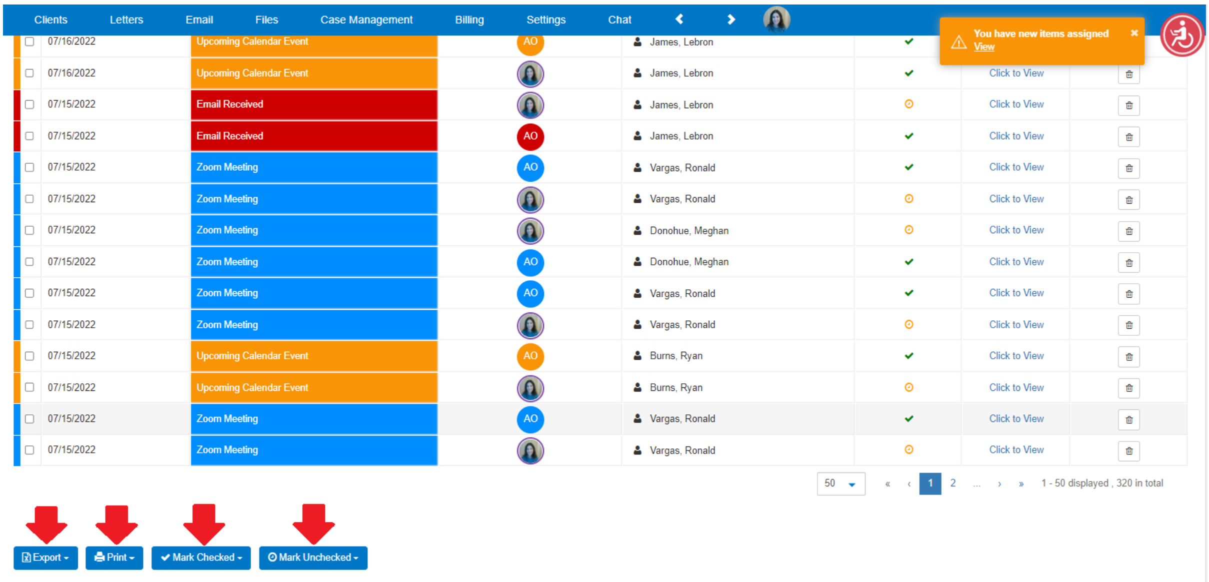


7. Actions: clicking the Delete icon you can remove the notification from Notification Dashboard..



8. Available buttons:

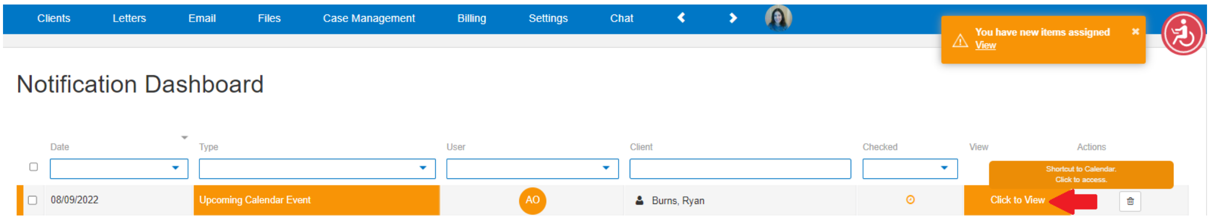
Export Button: to export the selected notifications into an Excel report.
Print button: to print the selected notifications into a PDF report.
Marked checked: to mark checked the selected notifications.
Marked unchecked: to marck unchecked the selected notifications.



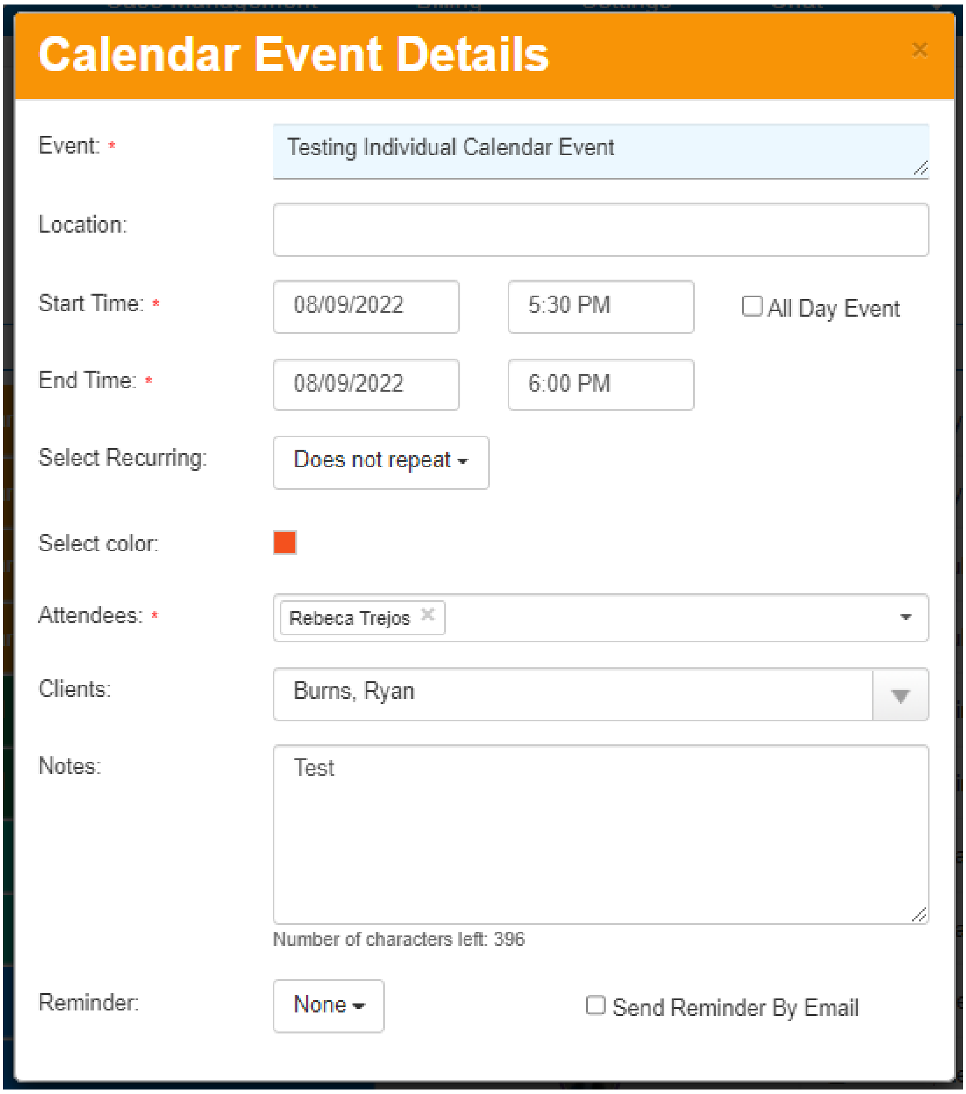
7. Click to View Details on Notification Dashboard for each notification type

1. Calendar Event:

When the user clicks on “**Click to view**” in Notification Dashboard



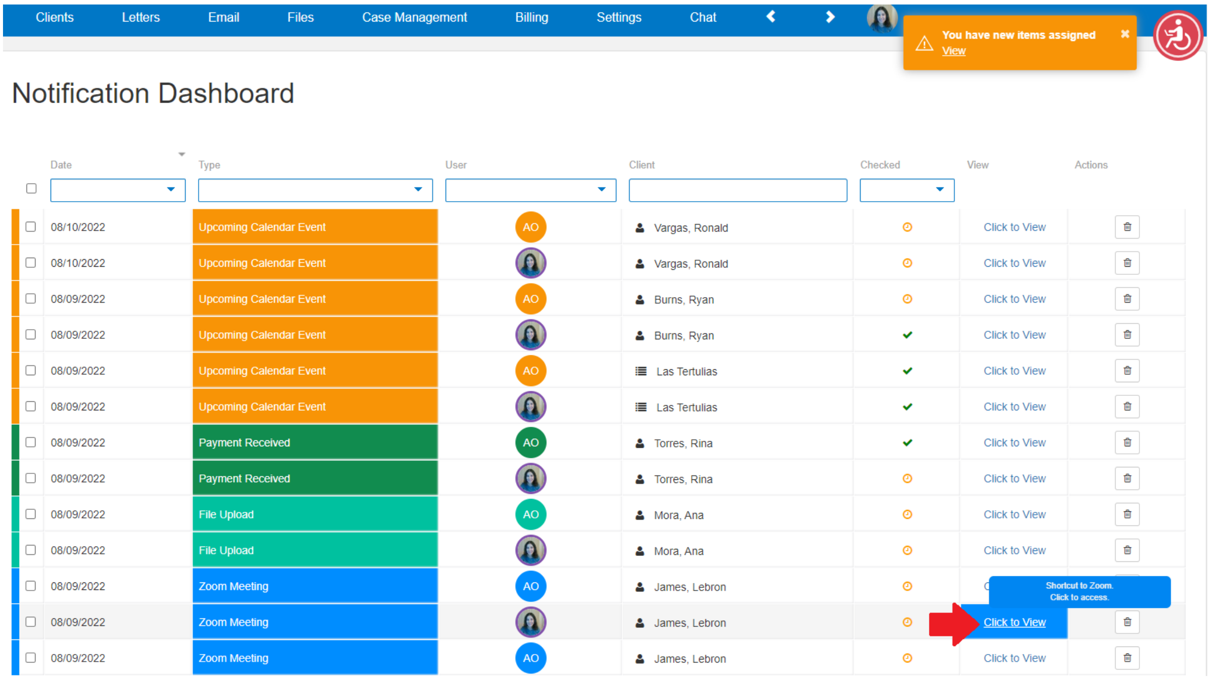
This pop up is going to be displayed with the following information:



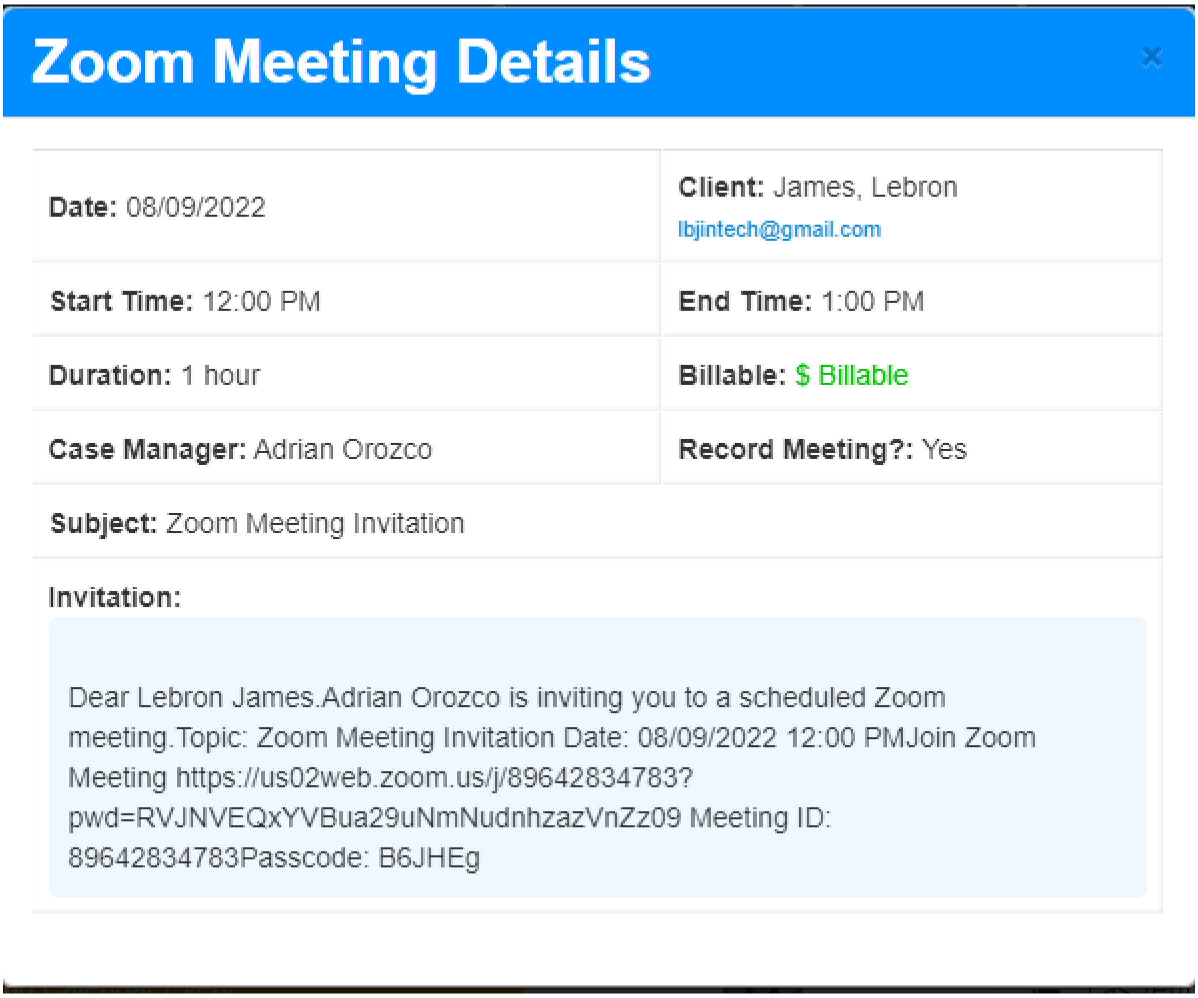
***Event:** where the user is able to see the name of the event.
***Location:** at which location the event will be held.
***Start time:** the specific hour for the beginning of the event.
***All day event:** is a checkbox to select if it is an all day event.
***End time:** the specific hour for the end time of the event.
***Select Recurring:** daily,weekly, monthly, annually, every weekday or custom.
***Attendees:** the names of the attendees of the event.
***Client:** the client's name.
***Notes:** if it is necessary the user is able to add some notes.
***Reminder:** before starting the event, the user is able to get a reminder.

2. Zoom Meeting

When the user clicks on “**Click to view**” on Notification Dashboard.

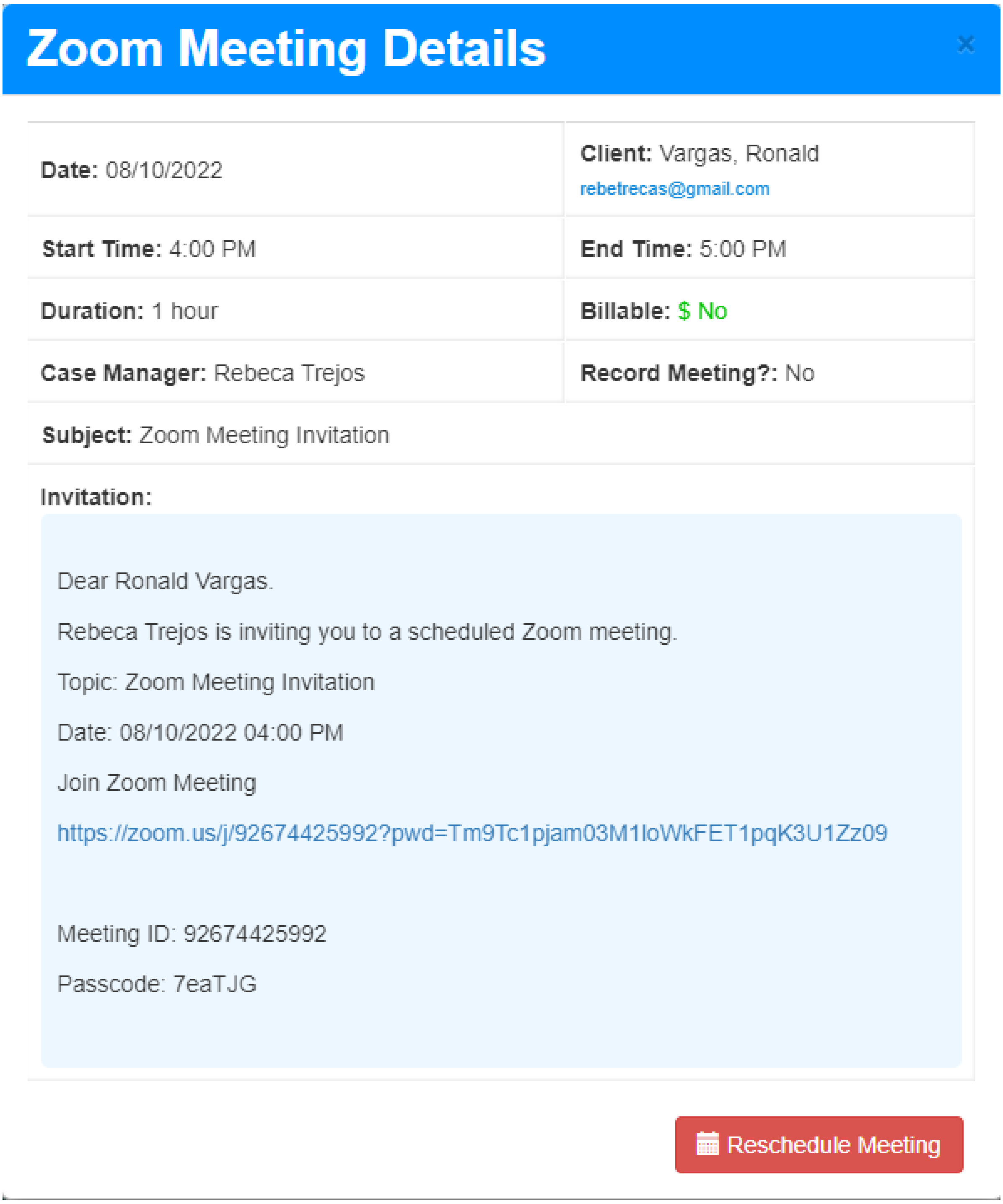


This pop up is going to be displayed when the Zoom Meeting has been already held, includes the following information:

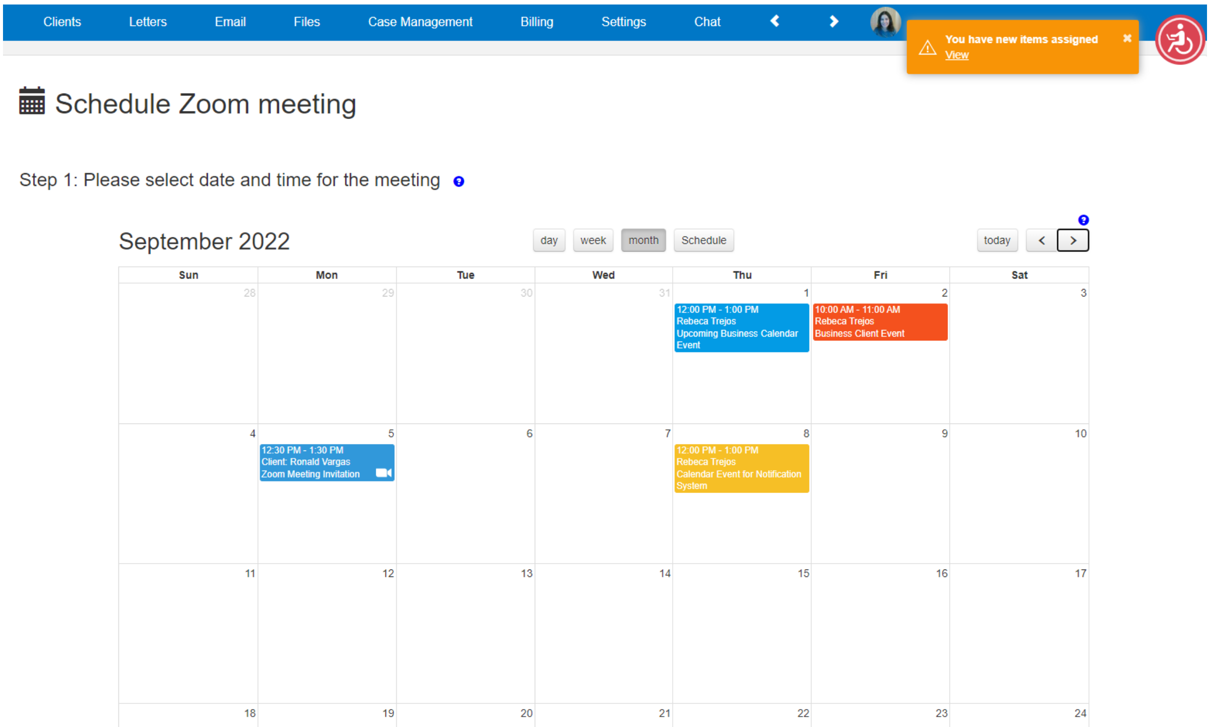


***Date:** is the date on which the Zoom Meeting is going to be held.
***Client:** Client's name and under it the email.
***Start time:** meeting start time.
***End time:** meeting end time.
***Duration:** the time spent in the Zoom meeting.
***Case Manager:** the representative in charge of the case.
***Record Meeting:** yes/no.
***Subject:** is the purpose of the meeting.
***Invitation:** it is the invitation that the client gets in his email, with all the details to join the zoom meeting.

When the Zoom Meeting has not been held, the next pop up will be displayed:

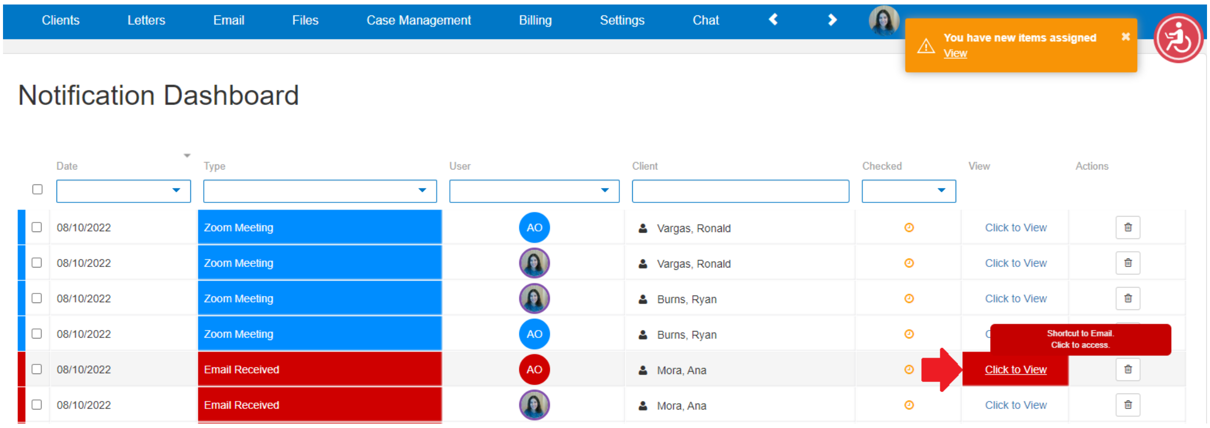


It has the same information and the **Reschedule Meeting button.** This button is useful when you need to reschedule the Zoom Meeting, clicking on this button the system will take you to the calendar in order to select another date for the Zoom meeting.

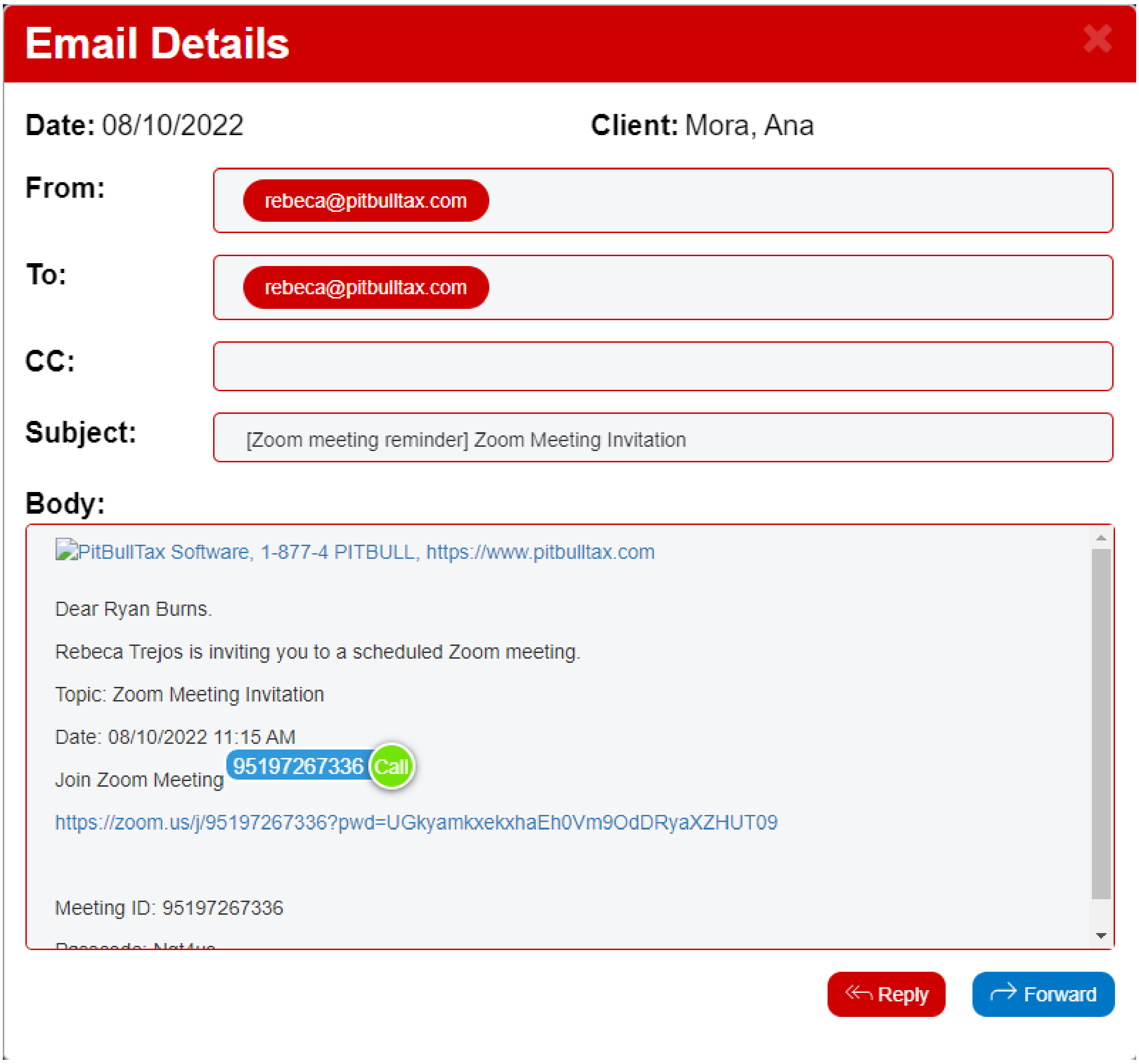


3. Email

When the user clicks on **“Click to view”** in the Notification Dashboard

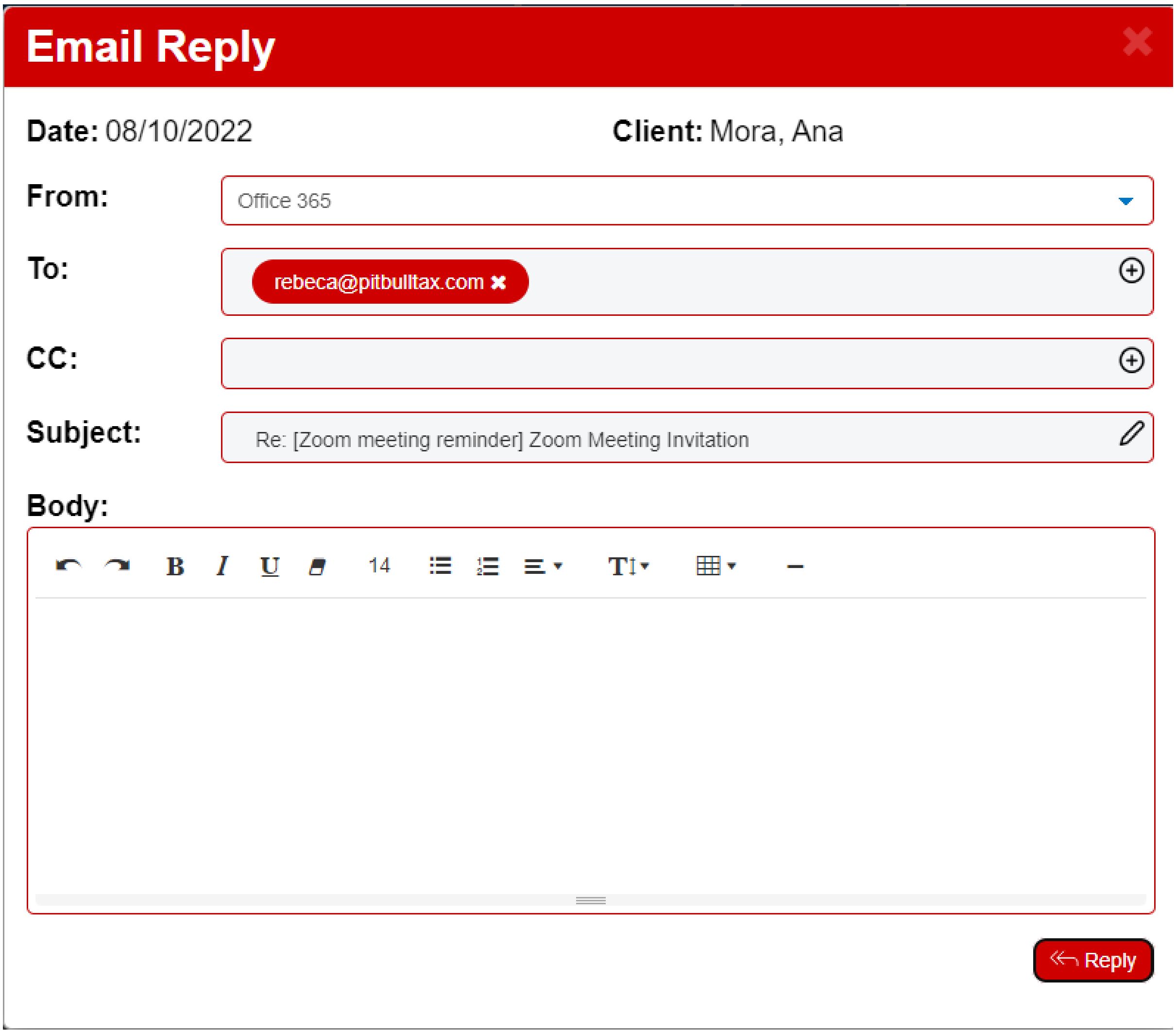


This pop up is going to be displayed with the following information:

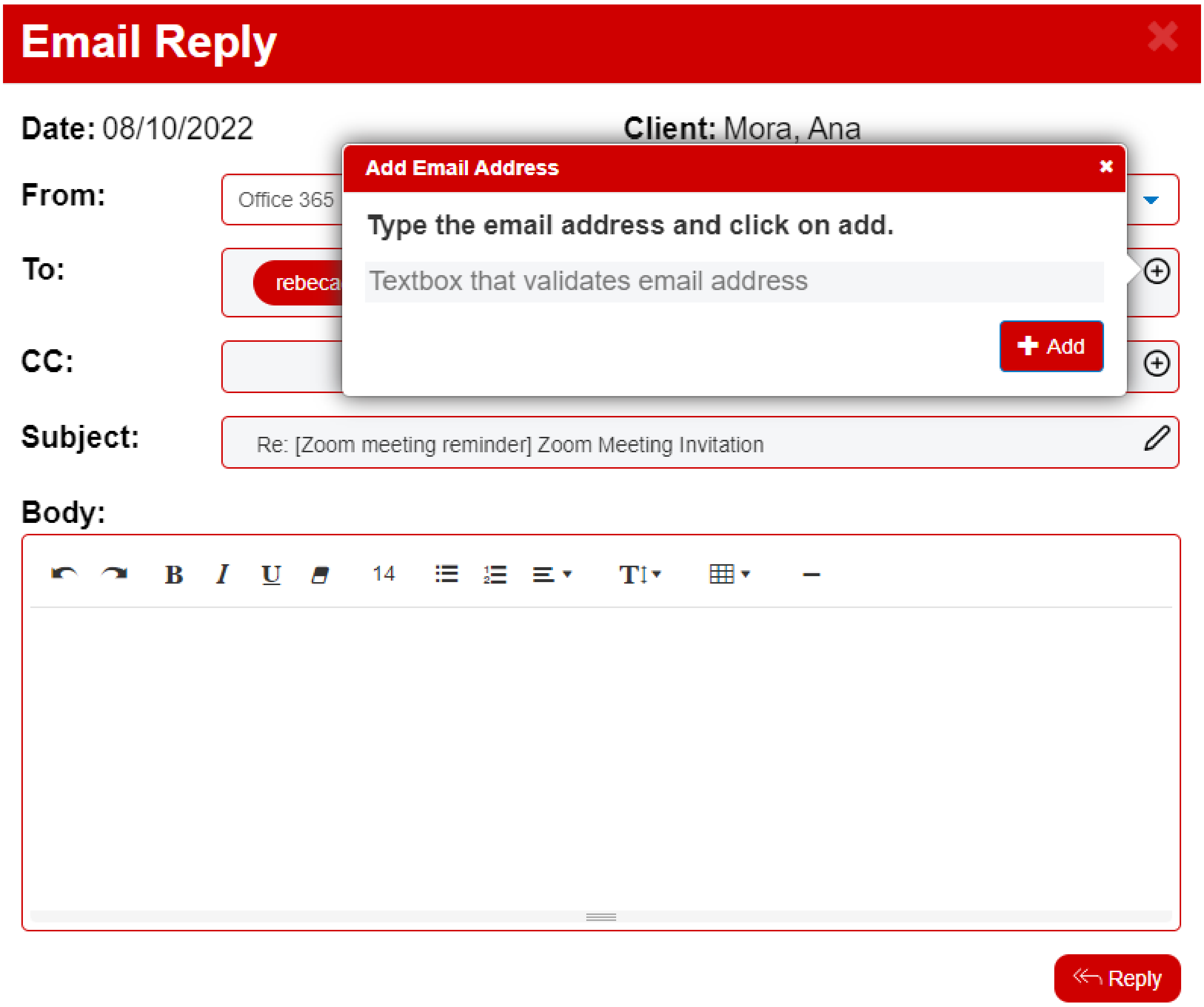


***Date:** Shows the date when the email was received.
***Client:** the client's name.
***From:** indicates the client's email address.
***To:** indicates the User's email address that received the email.
***CC:** Shows the email addresses that were CC'd in the email message.
***Subject:** The subject of the email is shown.
***Body:** Shows the body of the email that was received.

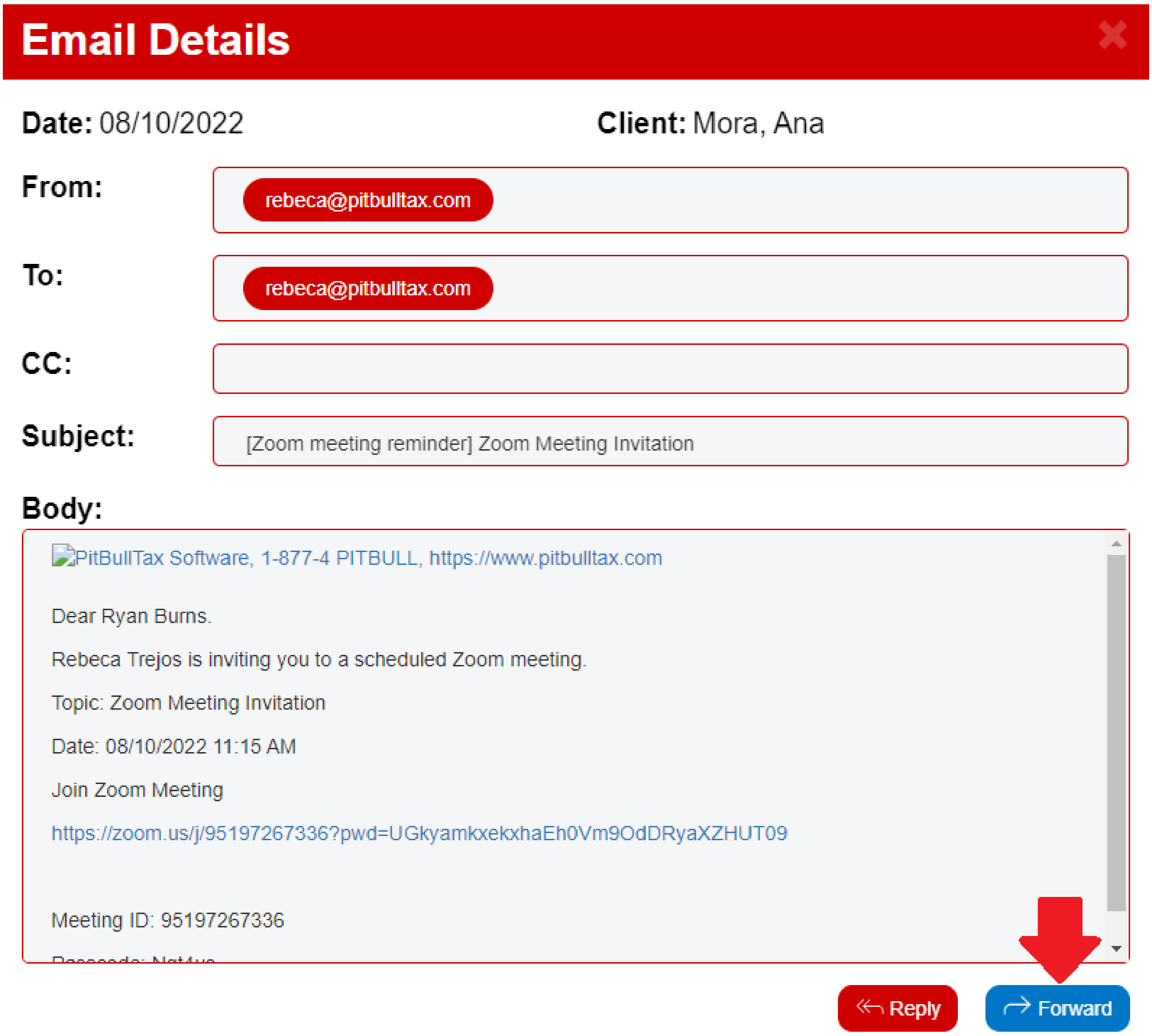
***Reply:** When the user clicks on **Reply**, the following window will appear, in order to answer the email. The sender will be able to edit the body of the email. They select the address to send the email with the From dropdown. The options shown in this dropdown are the emails that are synched with the User's PBT account.



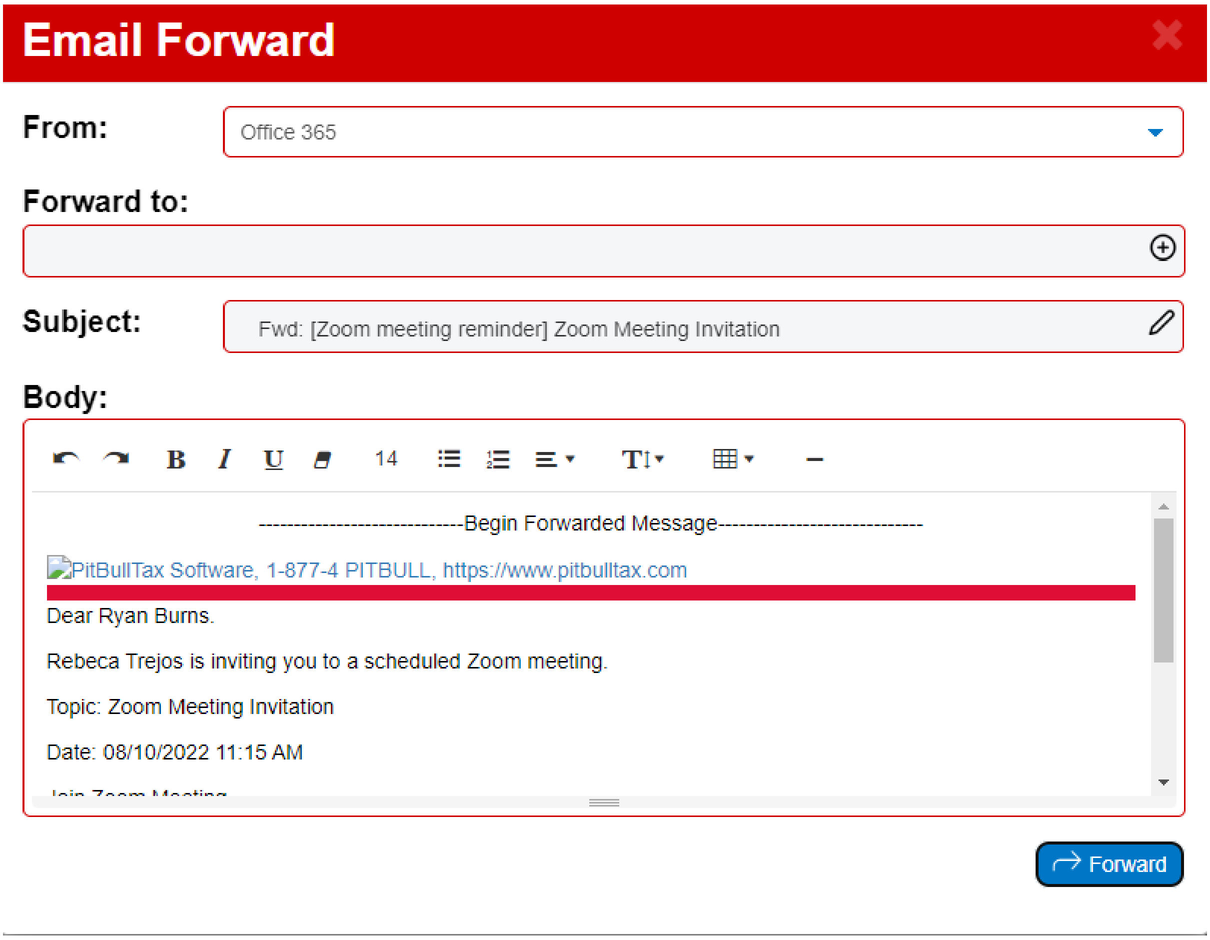
When the User clicks on the plus icon the add email prompt is the following:



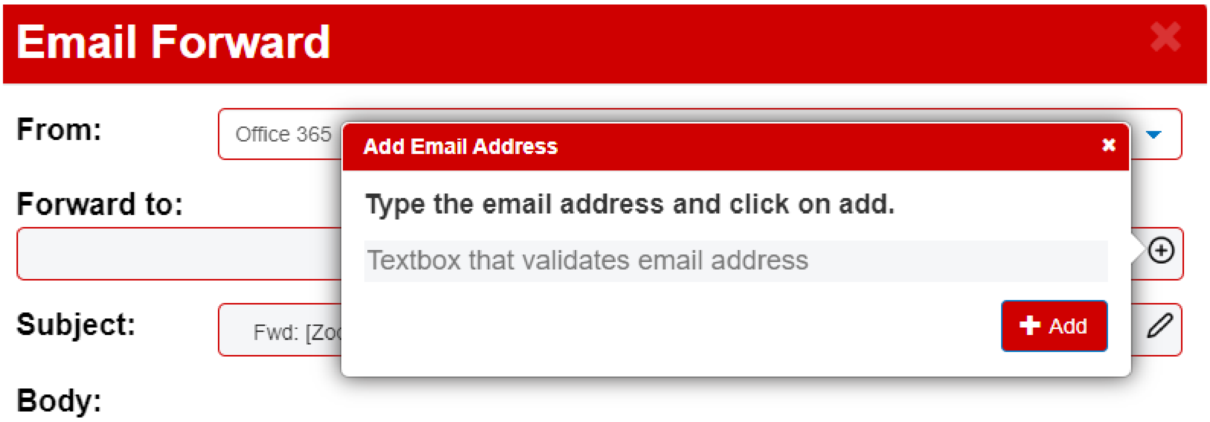
***Forward:** When the user clicks on the **Forward** button



The following window will appear, in order to forward the email to another email address.



Includes the next details:
From: it is the sender of the email.
Forward to: to resend the email to another receiver.Clicking the plus icon, you will be able to add another email address.

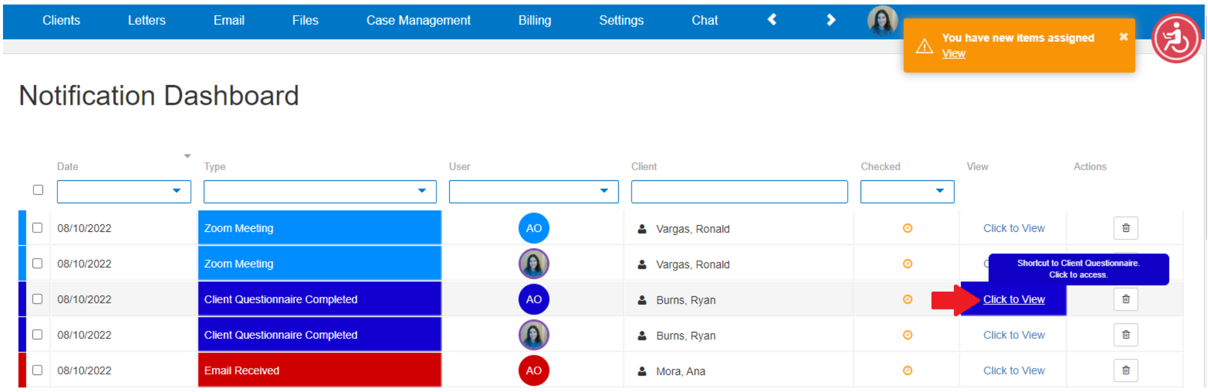


Subject: The subject of the email is shown, and using the pencil icon, the user will be able to edit the subject.

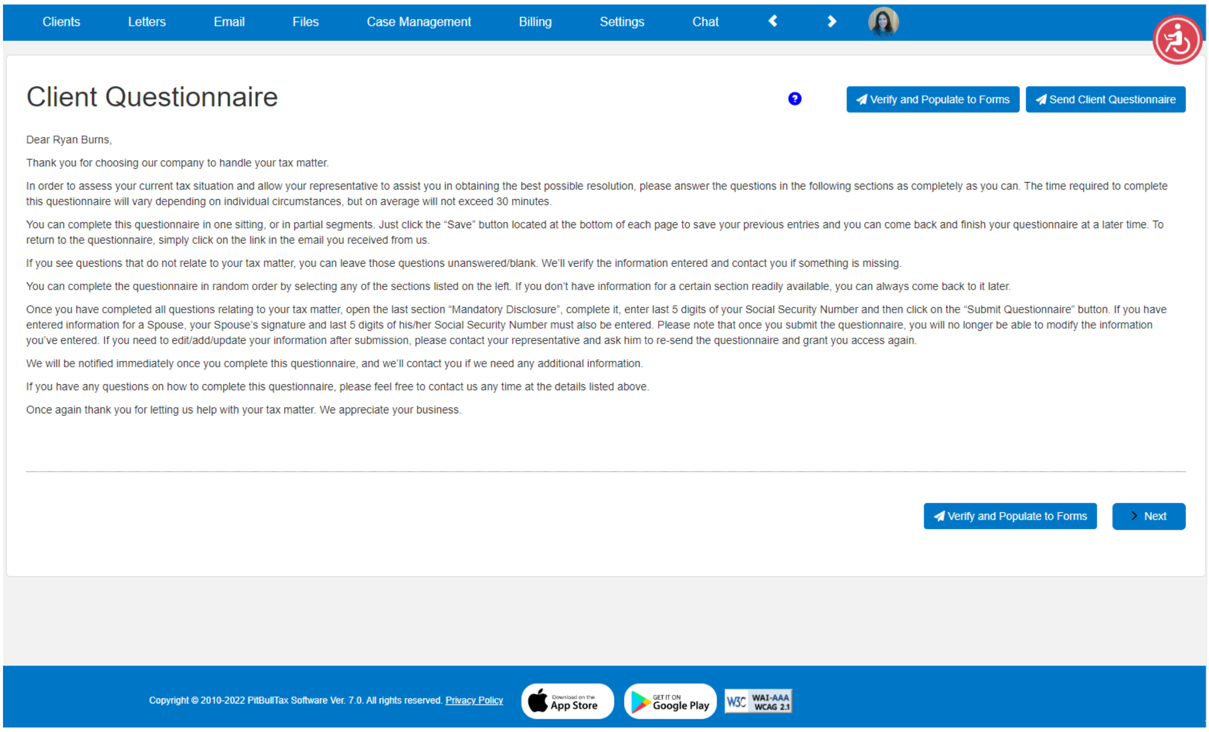
Body: Shows the body of the email that was received. The body of the email can be edited as well.

4 .Client Questionnaire

When you click on the **“Click to view”** option in the Notification Dashboard

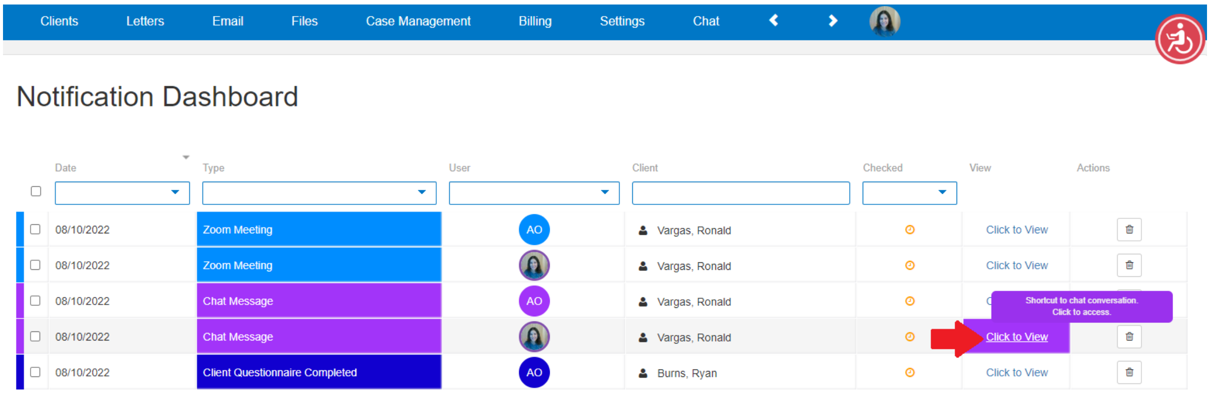


The Client Questionnaire window is displayed, there you can click on “Verify and Populate to Forms”.

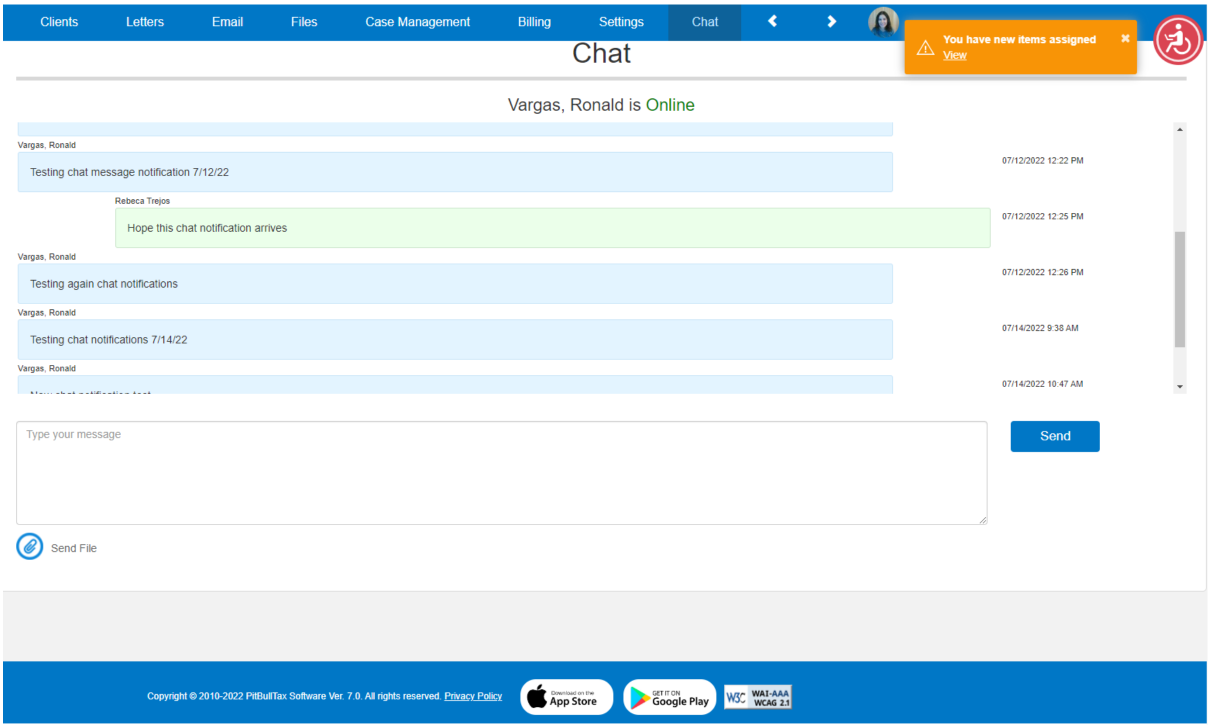


5. Chat Message

When you click on the **"Click to view"** option in the Notification Dashboard

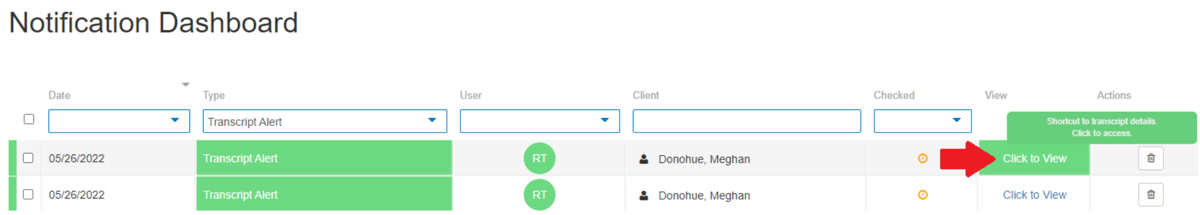


The system will open Chat conversations.

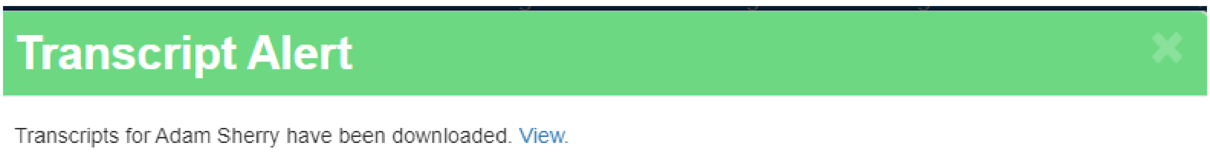


*6. Transcript Alert

When you click the **“Click to view”** option in Notification Dashboard

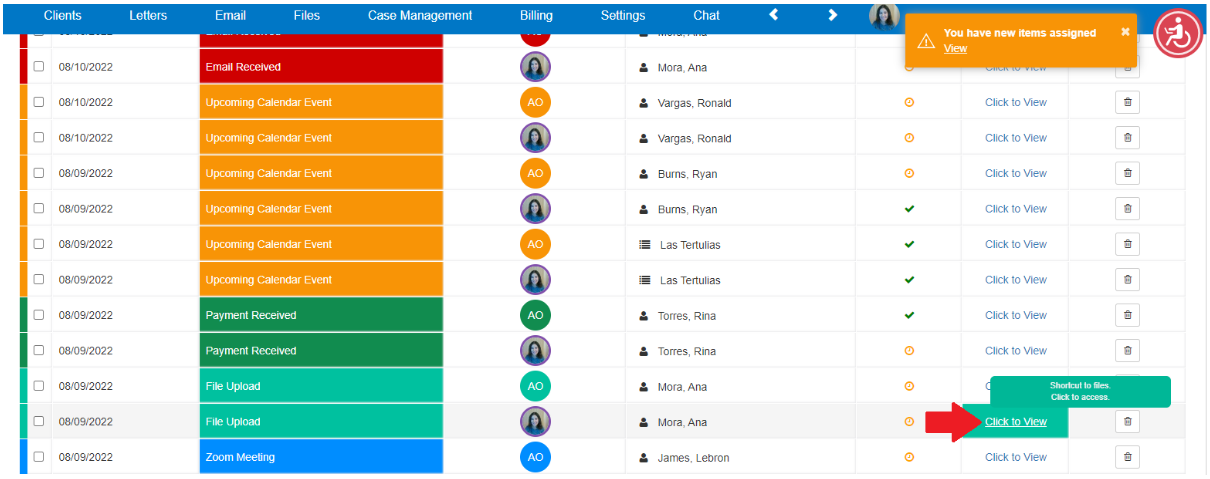


The system will open the Transcript Alert. Clicking the “View” button the Transcript will be open.

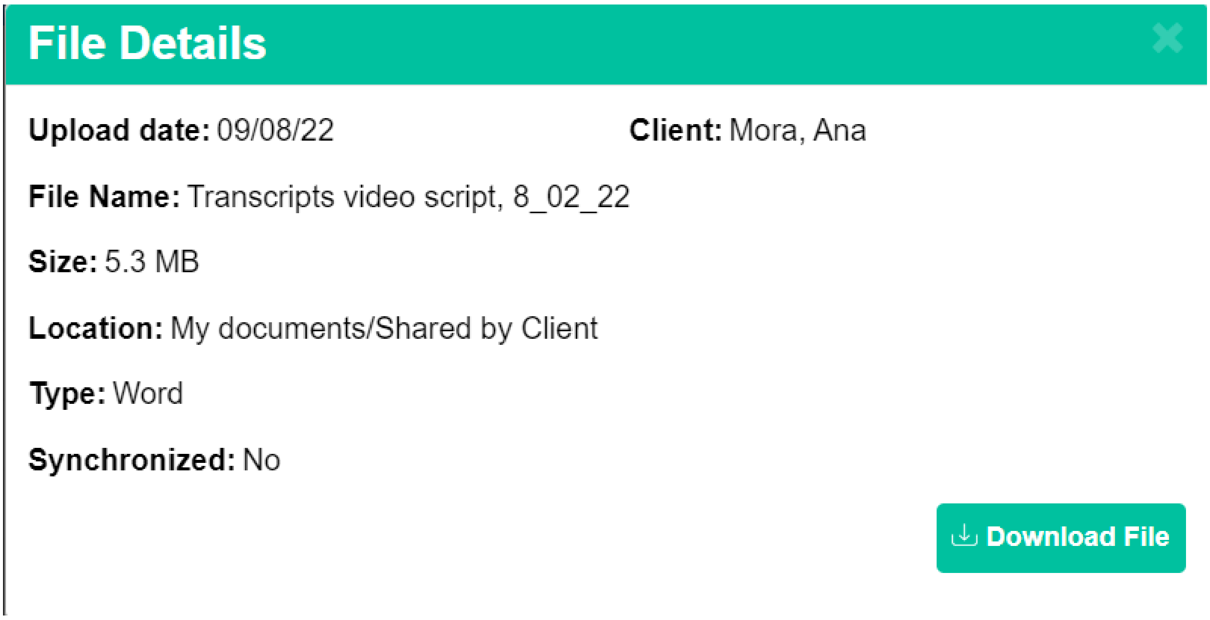


7.File

When you click on the **“Click to view”** option in Notification Dashboard.



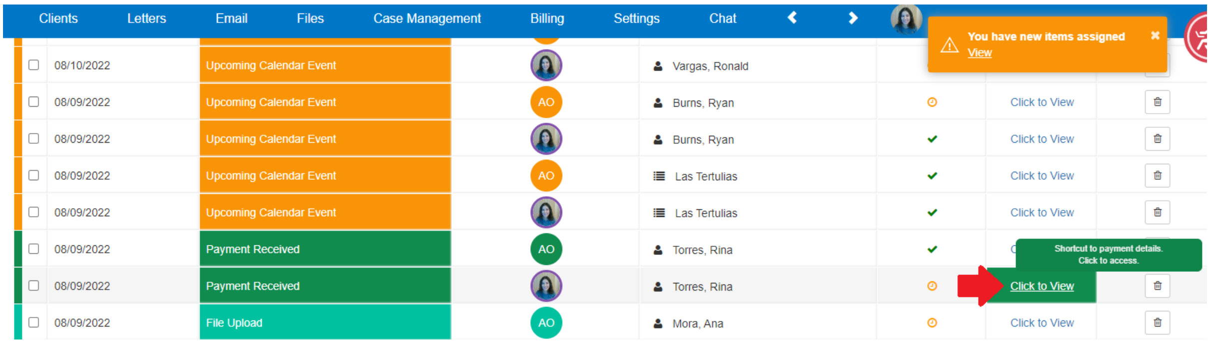
The next pop up is going to be displayed with the following information:



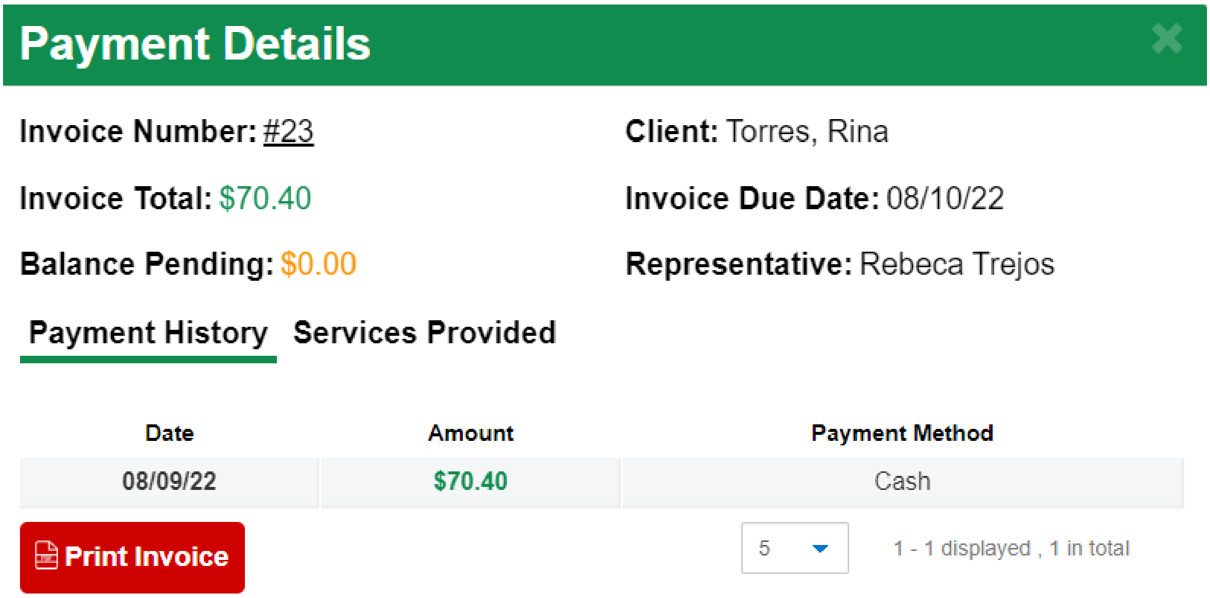
***Upload date:** is the date when the file has been uploaded.
***Client:** the client's name.
***File Name:** is the name of the uploaded file.
***Size:** is the size of the uploaded file.
***Location:** it corresponds to the location in the User’s PBT storage of the uploaded file.
***Type:** is the type of file.
***Synchronized:** if the User has synchronized an online storage account (Dropbox, OneDrive or Google Drive) to the file, the details are shown in the File Details.
Download File button: if you need to download the file, click on this button.

8. Payment Received.

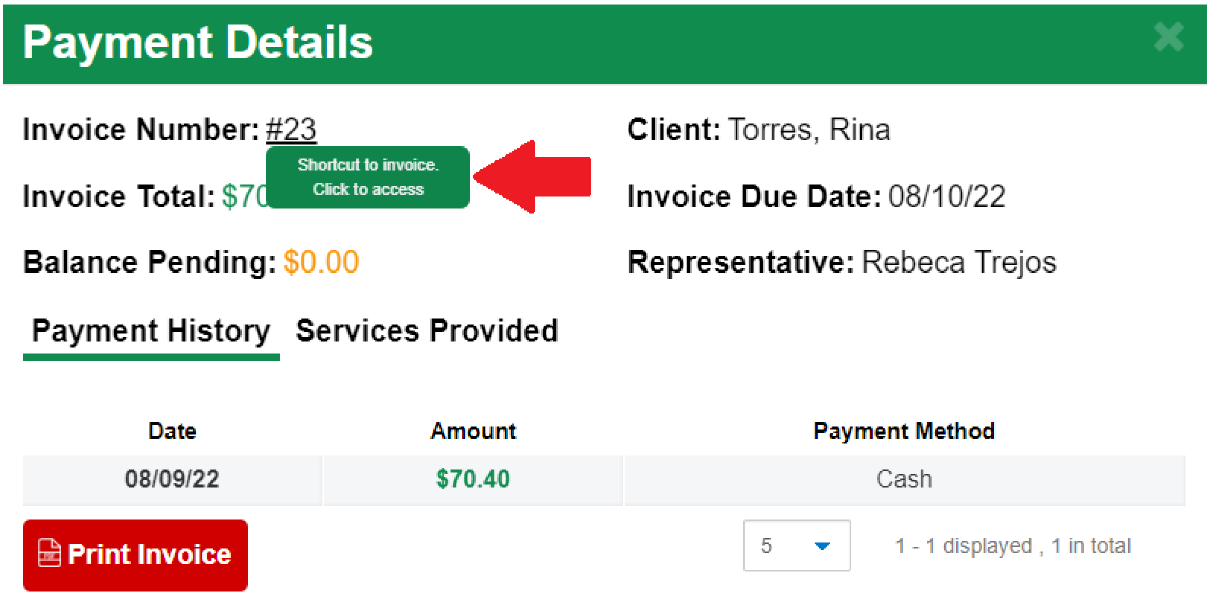
When you click on the “**Click to view”** button

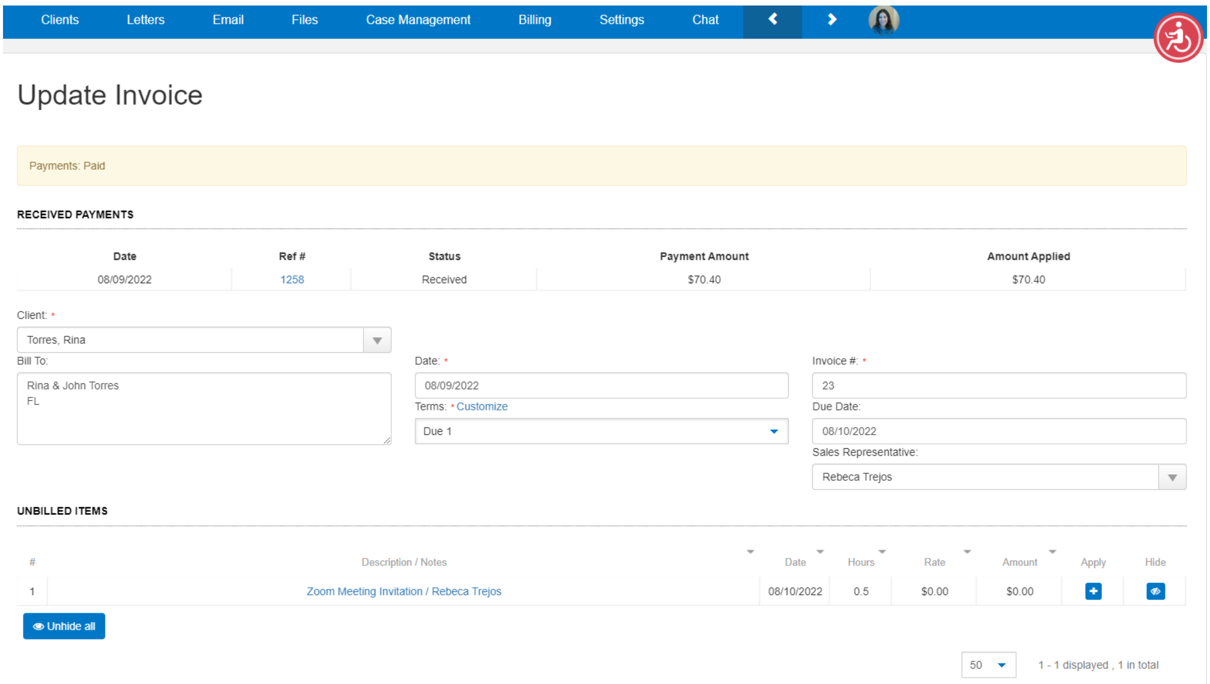


A pop up is going to be displayed with the following information:



***Invoice Number:** to identify which invoice received the payment.
Clicking the shortcut to invoice in the Invoice number, the user will see the Update Invoice.

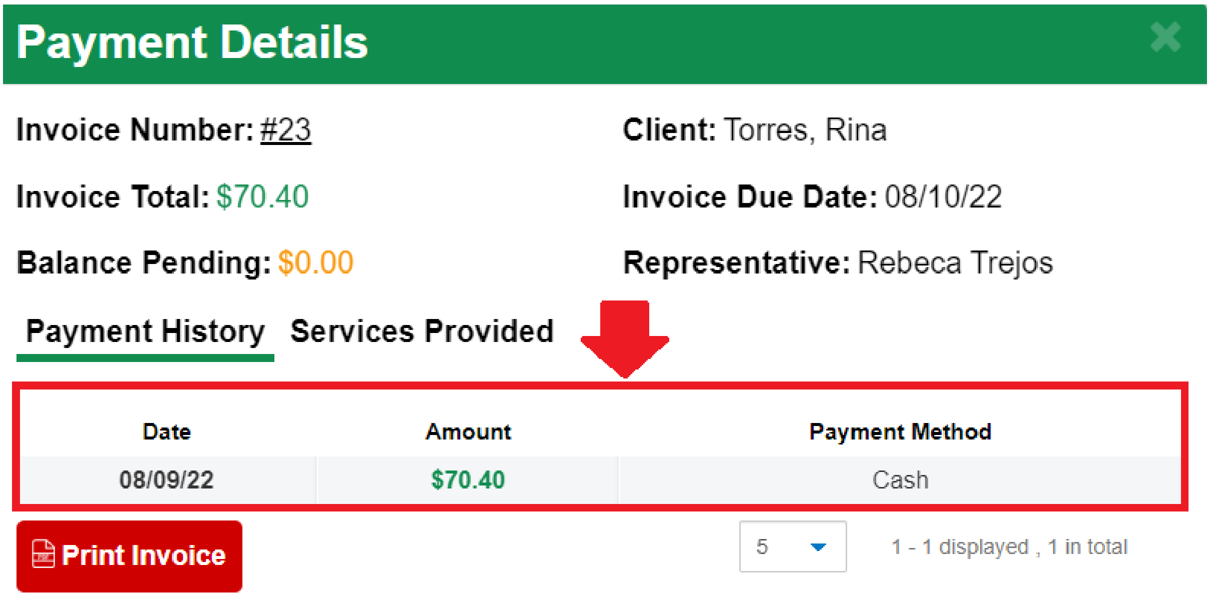




*__Invoice Total:__ indicates the total amount of the invoice.
*__Balance Pending:__ indicates the missing amount of the payment.
*__Client:__ it is the client's name that the invoice is associated with.
*__Invoice Due Date:__ indicates the invoice due date or if it is not due yet.
*__Representative:__ it is the client's representative name.

In the payment details there are two tabs to open:

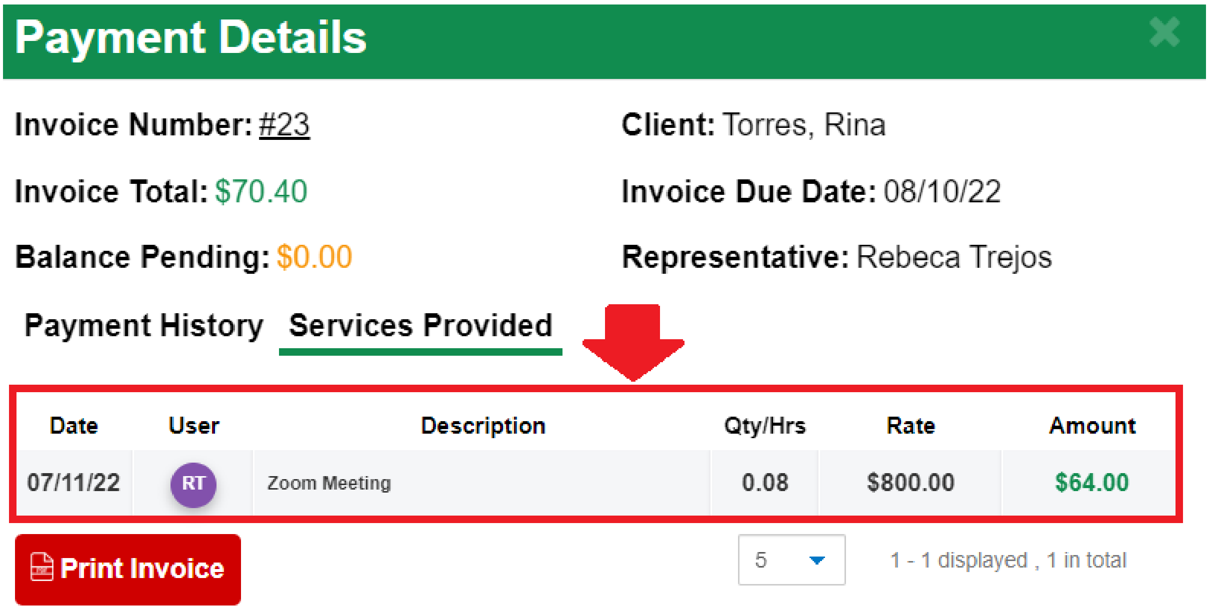
- **Payment History:** to view a payment history for the invoice.



*__Date__: The date when the payment was received is shown in the first column.
*__Amount:__ The amount that was paid by the client is shown.
*__Payment Method__ indicating if it was paid via Cash, Paypal or Credit Card. In the Credit Card option, the last four digits of the credit card are going to be shown under the credit card text.

At the bottom of the **Payment Details** section there is a button to **Print** the invoice.

- **Services Provided:** to view the services provided for the invoice.



Inside Services Provided tab, you will find the following information:

***Date** of the provided service.

***User** or users in charge of the service, including his/her picture or initials. The circles with the user´s pictures will be overlapping in case there are more than 2 users that provided the service.:

Description of service provided.

Quantity/Hours spent in the service.

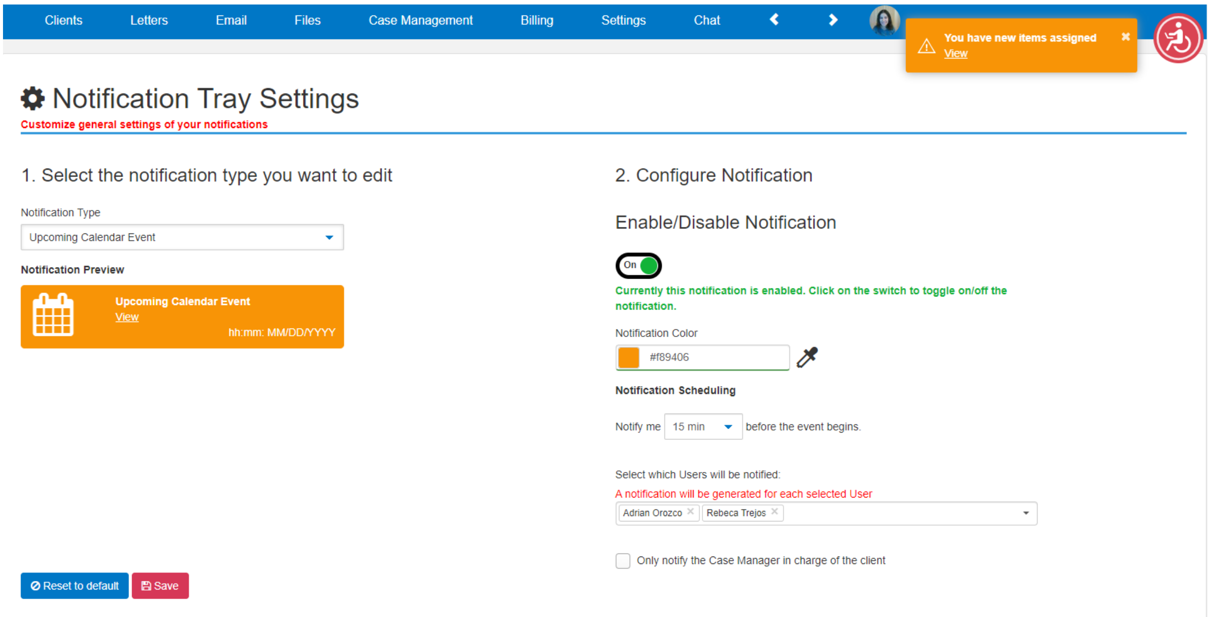
Rate per hour that the user establishes.

Amount billed per service.

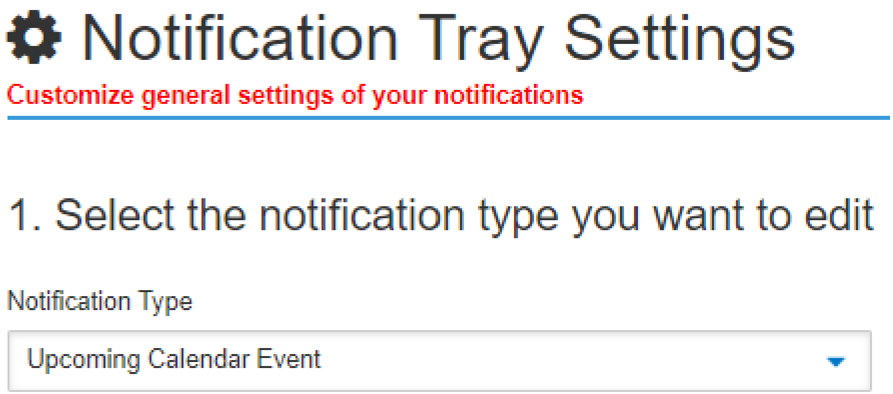
8. Notification Settings

At the bottom of the **Notification Tray** you can find the **Notification Settings** button.

Clicking on the Notification Settings button, the **Notification Tray Settings** will be displayed.

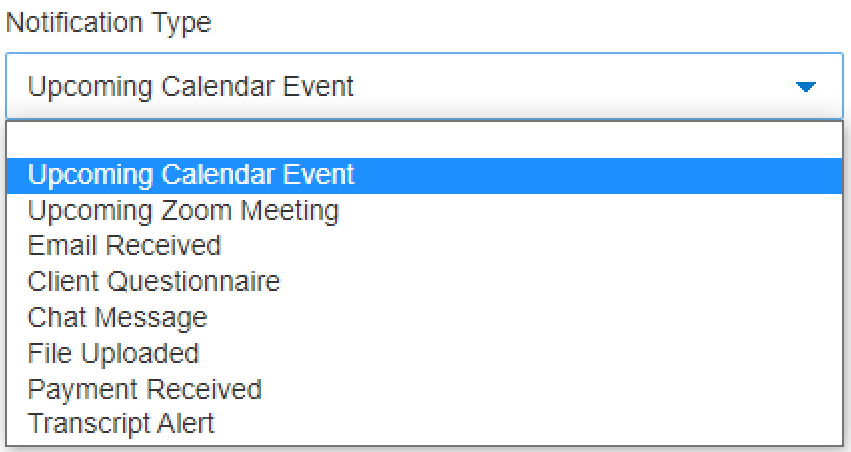


In the Notification Tray, you can select the notification type you want to edit or configure.



This is **a dropdown** that allows the User to select which notification type is going to be configured among 8 different types of notifications.
This type of notifications are:

- Upcoming Calendar Event
- Upcoming Zoom Meeting
- Email Received
- Client Questionnaire
- Chat Message
- File Uploaded
- Payment Received
- Transcript Alert

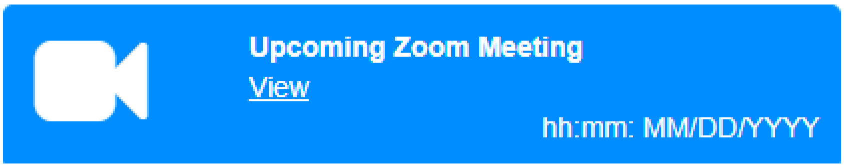


Each type of notification has the same items to be configured.

-1. Notification Preview: to check the features of the notification bubble and how it has been configured.

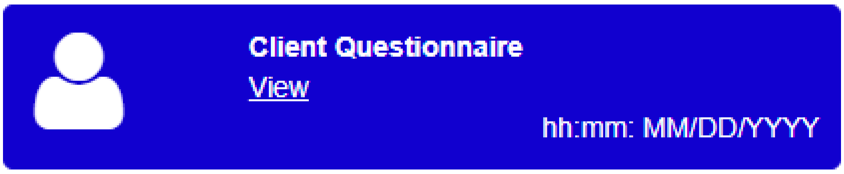
Notification Preview for Upcoming Calendar Event

Notification Preview for Upcoming Zoom Meeting



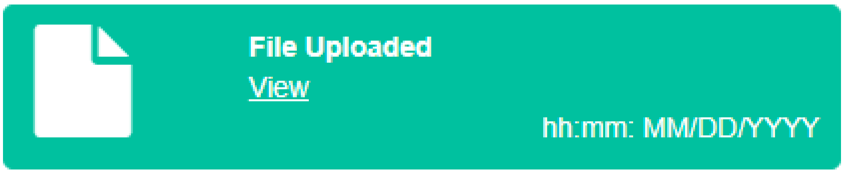
Notification Preview for Email Received

Notification Preview for Client Questionnaire

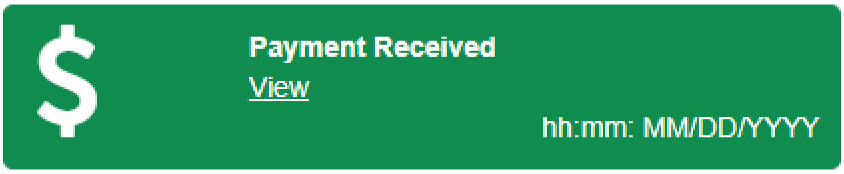


Notification Preview for Chat Message

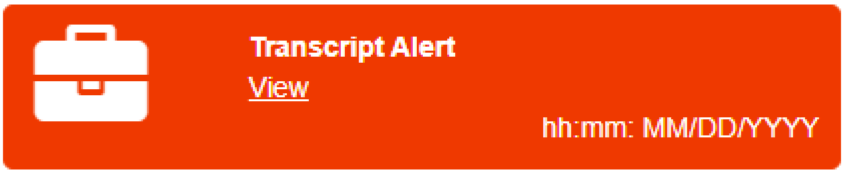
Notification Preview for File Uploaded



Notification Preview for Payment Received

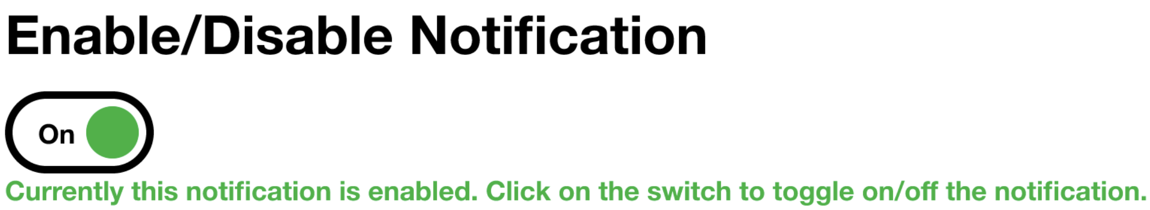


Notification Preview for Transcript Alert

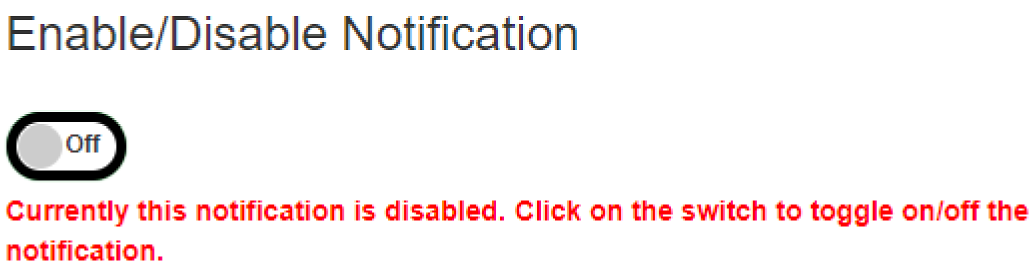


- 2. Configure Notification:

Enable: allow the system to send the user notifications. In this case the switch will be in green color when it is on.



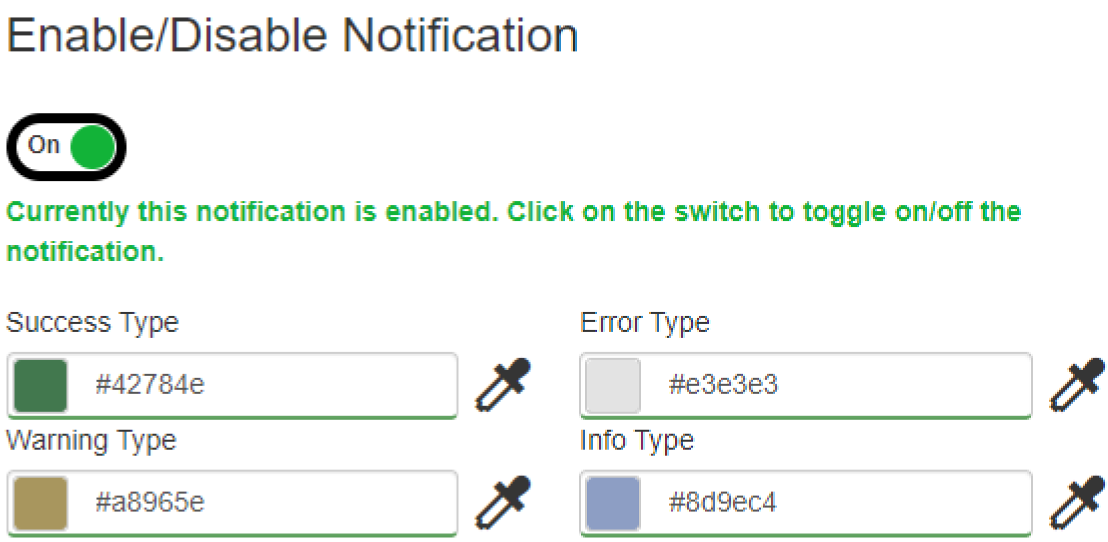
Disable: not allow the system to send the user notifications. In this case the switch will be in gray color when it is off.



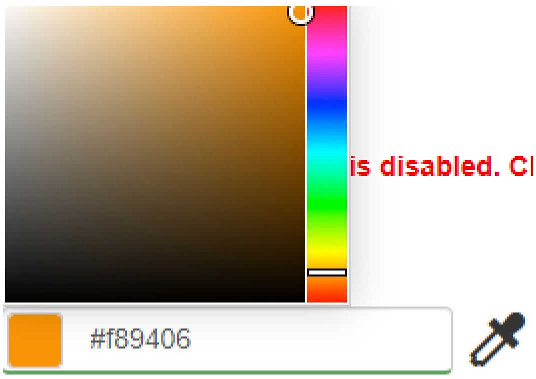
In the **Configure Notification for Transcripts**, there are 4 options:

- Success type
- Error Type
- Warning Type
- Info Type

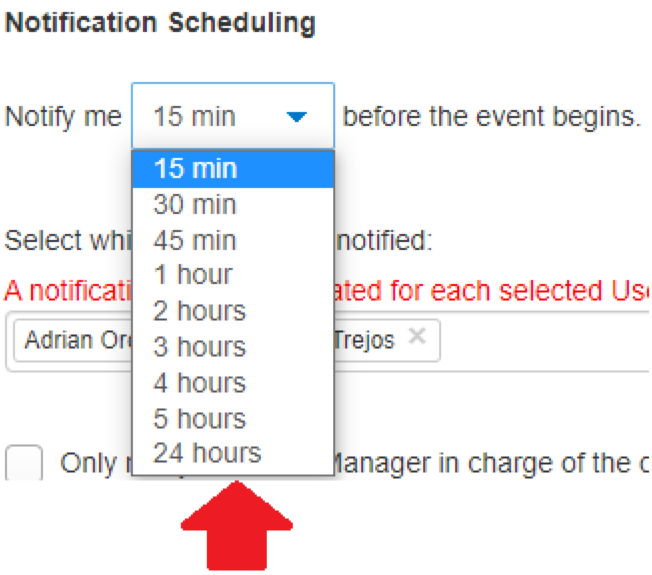
Each one can be customized.



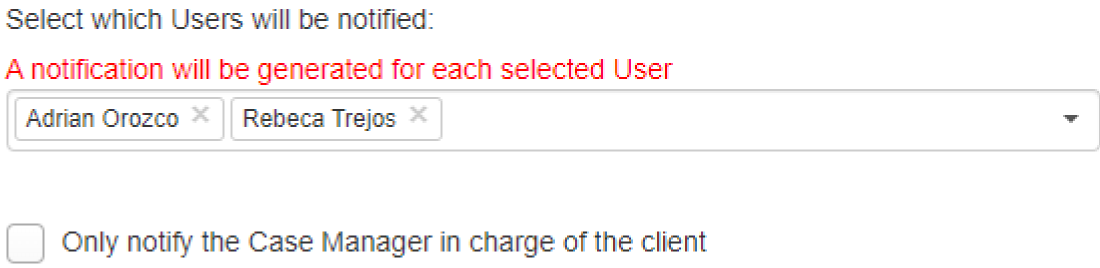
***Notification Color:** to configure the color of the notification bubble. You will see the hex value colors by default in the respective slot. A color picker appears to allow the user to input any color. If the user wants to come back to the original color should click on the **Reset to Default** button.



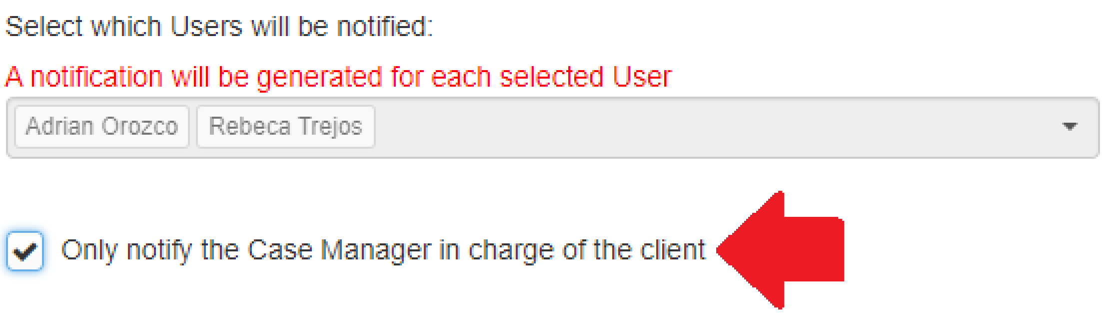
***Notification Scheduling:** Dropdown that is going to set the time in which the user wants to receive the notification before the event begins, it could be: 15,30,45 minutes or 1,2,3,4,5 or 24 hours before the event begins.



***Select which Users will be notified:** This dropdown allows users to choose which Users will receive the notification. This is intended for multi user licenses where more than 1 User should receive the notification.



It is also available the option to only notify the Case Manager in charge of the client. This causes the dropdown to gray out.



Also you will be able to **Reset to default,** in order to **come** back to the default colors, or click on **Save** button to save all changes, then the system will bring you to the Step by Step Workflow of PitBullTax Software.