

NAVTILUS

NOTIFICATION MANAGEMENT

7. MARCH 2023

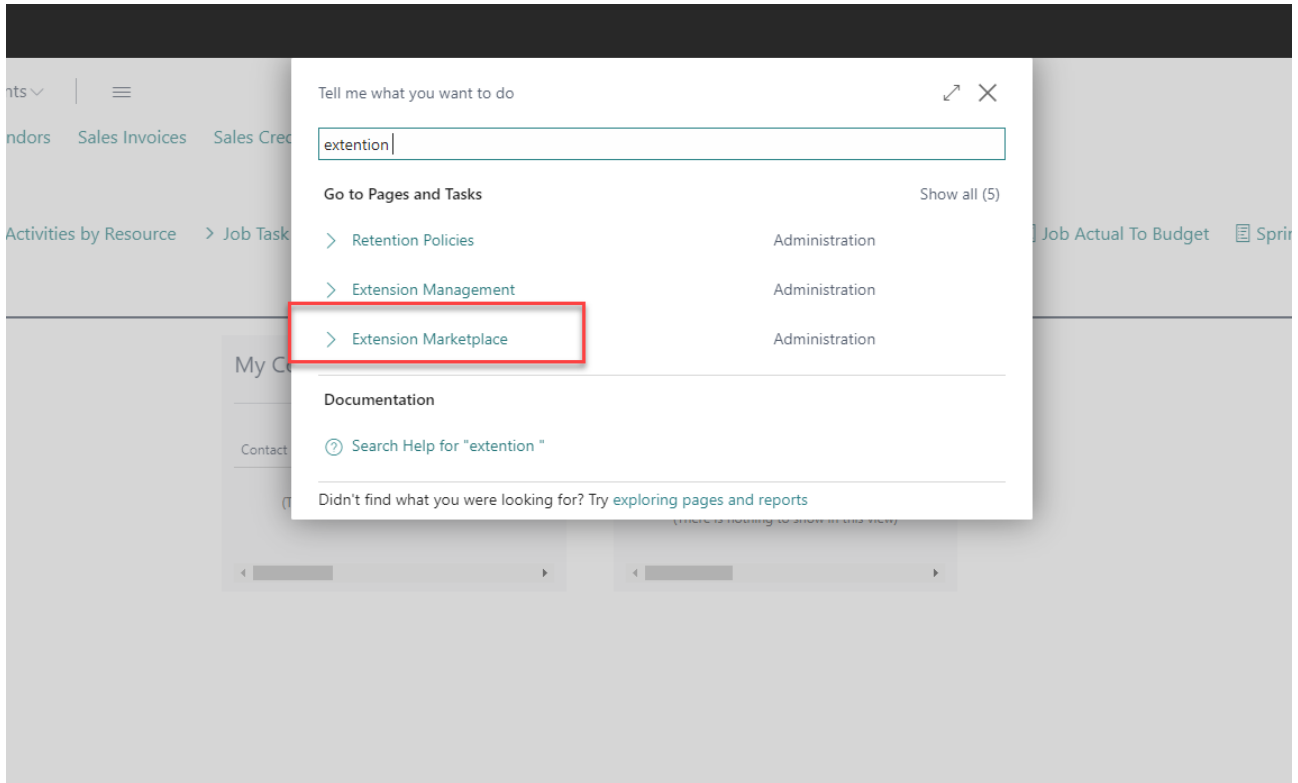
NAVTILUS SOFTWARE P/S

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How to install

Go to Extension Marketplace



Search for Navtilus Notification Management. Go to the application and use the contact me button to create contact to the team.

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AppSource

Apps for Business Central

Apps (0)

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notification management 🔍

Search results for "navtilus notification management"

⬆ ⬆ Sort By: Best match ▾

Showing 1 results in apps.

All results

NAVILUS

NAVtilus Notification Management

Navtilus

Business Central

Enables you to have control over the users "My Notifications", includes assisted management helper.

Contact me

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Setup guide and definitions.

By using the app, it is possible to configure notifications on different levels.

In the Notification setup for all, the first configuration is the header. The header consists of three options; Number of Notifications, Time Period and Time Since Last Notification.

Number of Notifications determines how many notifications the user should be presented before they get the offer to disable the notification.

Time Period is defined as a date formula that scopes the notifications. It specifies that the Number of Notifications should have happened in the given period.

Time Since Last Notification is independent from the two other options in the header of Notification Setup for all. It's defined as a date formula. If a notification is disabled and the period of time has passed since the user last was supposed to get a notification, the user is offered to enable the notification.

On the list of notifications, there are several options to configure. First, we will have a look at the status. The status can be set to each of the five options. As default, the status is set to Assisted.

The Assisted status is giving intelligent suggestions on how to control notifications. This type of status allows each user to control whether the notifications is enabled or disabled. The suggestions are based on the values in the header of the Notification Setup for all.

When the User Defined status is selected, the notifications acts like it would in a standard version of Business Central. There are no suggestions made and each user can select there preference in the regular My Notifications Setup.

The two statuses Everyone and No One are fairly similar. Both of them removes the notification from My Notifications, meaning that users cant configure the notifications individually. Choosing Everyone means that all users get all notifications. No One means that all users will have the notification disabled.

The last status, Locked, gives the possibility to lock a configuration. The administrator of notifications determines when a user or all users should be presented with the notification. The user is still able to see the notification in My Notifications, but they will get an error if they try to configure it themselves.

The next configuration option is the Conditions, which is defined as a regular Business Central filter. These can be configured on both a single-user level as well as an all-users level. The conditions are possible to configure on all notifications where the Conditions column shows View filter details or a filter is already set and is being displayed.

If a condition is created on an all-user level, it applies to all users except those, who has a single-user level condition defined. Hence, the single-user level condition is overwriting the all-user level condition.

Further, on a user-level basis, the notifications can be generally enabled or disabled without having to create any conditions.

Usage example 1: Available inventory on sales document.

On a sales order, we enter an item and quantity. Then we get a notification stating: “The available inventory for item 1900-S is lower than the entered quantity at this location.”

The screenshot shows the Dynamics 365 Business Central interface for a Sales Order. The header indicates the order is for 'Kontorcentralen A/S' with ID 101011. A notification bar at the top states: 'The available inventory for item 1900-S is lower than the entered quantity at this location.' Below this, the 'General' tab is active, displaying fields for Customer Name, VAT Date, Order Date, Due Date, Requested Delivery Date, External Document No., Status (Open), Sales Comment, and VAT Registration No. The 'Lines' section shows a table with the following data:

Type	No.	Item Reference No.	Description	Location Code	Quantity	Pallet Quantity	Colli Quantity	Outer Colli Quantity
Item	1900-S		PARIS Gästestol, sort		5	0.00	0.00	0.00

To disable the notification, we open the Notification Setup for all.

The screenshot shows the Dynamics 365 Business Central interface with a search bar at the top. The search results are displayed in a list format. The 'Notification Setup for all' option is highlighted. The search results are as follows:

Go to Pages and Tasks	Administration
My Notifications	Administration
Notification Entries	Lists
Sent Notification Entries	Lists
Notification Setup for all	Administration
Workflow Notification Setup	Administration
Send Overdue Approval Notifications	Tasks

In the Notification Setup for all, we search for Item Availability.

We now have the possibility to set a status for this notification. In this example we will choose No One, which will disable the notification for all users.

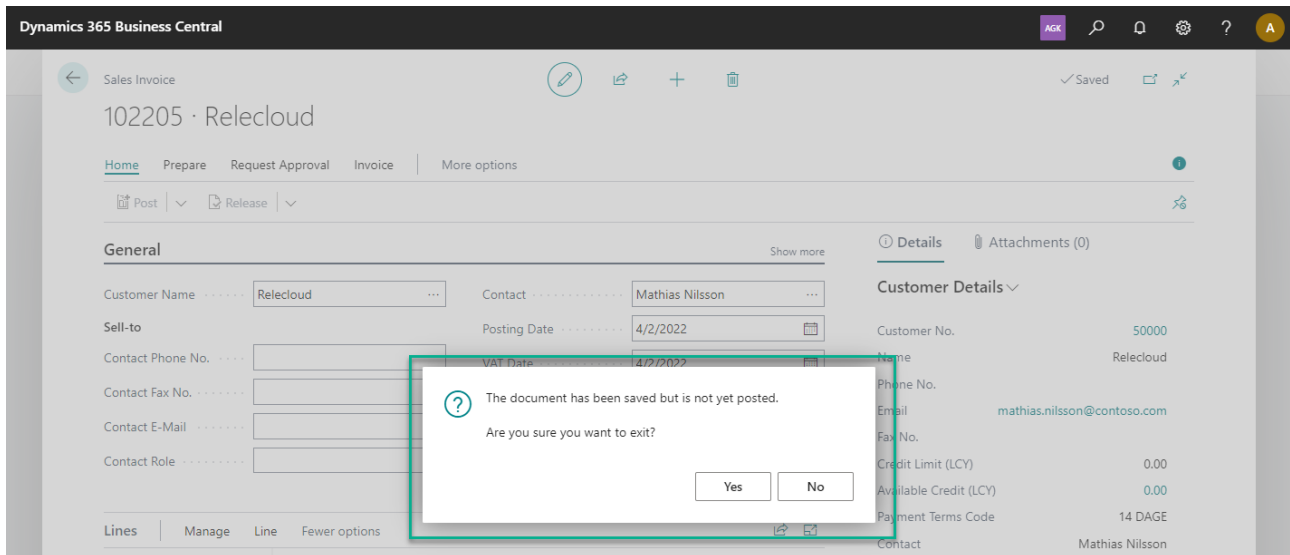
The screenshot shows the 'Notification Setup for all' interface in Dynamics 365 Business Central. At the top, there is a search bar containing 'Item availability' and buttons for '+ New', 'Edit List', and 'Delete'. Below this is the 'General' section with input fields for 'Number of Notifications', 'Time Period', and 'Time Since Last Notification'. The main section is a table with columns for 'Notification', 'Status', and 'Conditions'. The first row shows a notification for 'Item availability is low.' with a status dropdown menu open, displaying options: 'Assisted', 'User Defined', 'Everyone', 'No One' (highlighted with a green box), and 'Locked'. The 'Conditions' column contains a link '(View filter details)'.

Notification	Status	Conditions
→ Item availability is low.	Assisted Assisted User Defined Everyone No One Locked	(View filter details)

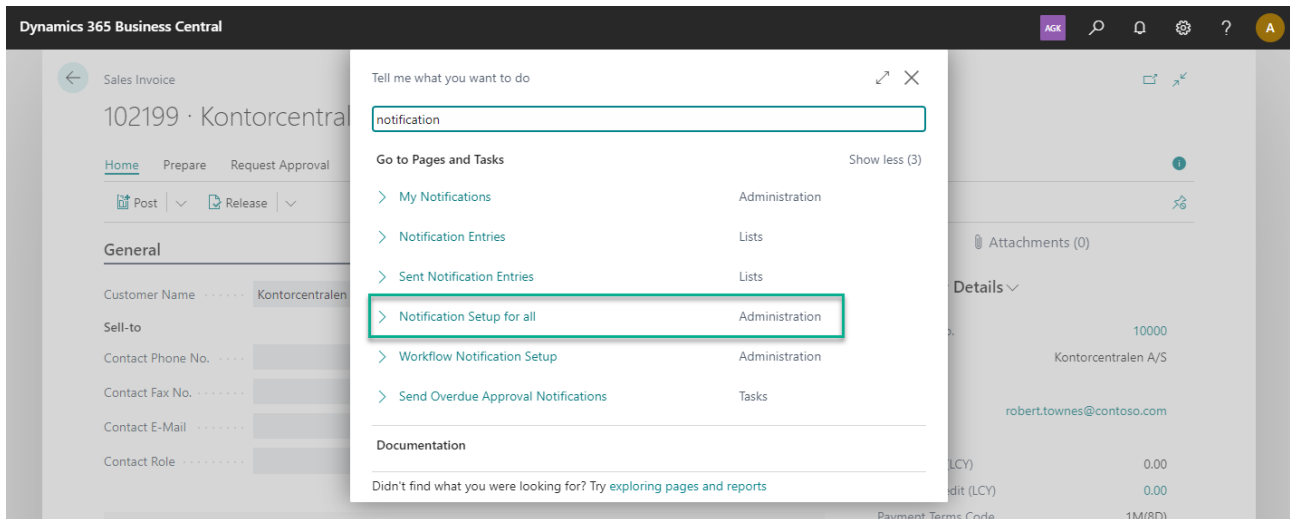
Usage example 2: Warning for unposted documents.

We create a sales invoice and enter the necessary information. When we leave the document without posting we get the message “The document has been saved but is not yet posted. Are you sure you want to exit?”.

We don't want this message to show on sales invoices for any users.



To disable the the message, we open the Notification Setup for all.



In the Notification Setup for all, we search for unposted documents. First, we set the status to locked, as we don't want users to be able to change the notifications settings. Secondly, we click the three dots in order to set conditions for the message.

The screenshot shows the 'Notification Setup for all' window in Dynamics 365 Business Central. The search bar at the top contains 'unposted documents'. Below the search bar, there are fields for 'Number of Notifications', 'Time Period', and 'Time Since Last Notification'. The main table has columns for 'Notification', 'Status', and 'Conditions'. The 'Status' dropdown is open, showing options: Assisted, User Defined, Everyone, No One, and Locked. The 'Conditions' column shows '(View filter details)'.

In the Define filters window, we select everything but the Invoice and then clicks OK.

The screenshot shows the 'Define filters...' dialog box. The 'Filter: Sales Header' section has several filters: 'Sell-to Customer No.', 'Payment Terms Code', 'Currency Code', 'Amount', and 'Document Type'. The 'Document Type' filter is expanded, showing options: Quote, Order, Invoice, Credit Memo, Blanket Order, and Return Order. The 'Quote', 'Order', 'Credit Memo', 'Blanket Order', and 'Return Order' options are selected. The 'Invoice' option is not selected. The 'OK' button is highlighted.

When returning to the Notification Setup for all window, the filter should look as shown below.

The screenshot shows the 'Notification Setup for all' window in Dynamics 365 Business Central. The search bar at the top contains 'unposted documents'. Below the search bar, there are fields for 'Number of Notifications', 'Time Period', and 'Time Since Last Notification'. The main table has columns for 'Notification', 'Status', and 'Conditions'. The 'Status' is set to 'Locked'. The 'Conditions' column shows 'Document Type: Order|Quote|Credit Memo|Blanket Order|Return Order'.

The message is now shown on all documents but the invoices.