Notifications: Overview

The **Notifications** panel (bell icon, top-right) collects alerts from across the CRM—events, assignments, imports and more—so you never miss an important action.

1. Event Reminders
Whenever you schedule a **Call** or **Reminder** in the Calendar, you choose one or more lead-time reminders:

Reminder Option	When it Fires
At time of event	Exactly at the scheduled start (e.g. “Your Call with John Doe is starting now.”)
15 minutes before	15 minutes prior (e.g. “Your Call with John Doe starts in 15 min.”)
30 minutes before	30 minutes prior
1 hour before	1 hour prior
24 hours before	1 day prior

> **Notification text** includes both the client name/ID and the exact event time, e.g.:
> “□□ Call with **client** at **3:00 PM** starts in **15 min**.”

2. System & Integration Notifications:
Data imports/exports
Success: “□ Clients imported successfully — *828* records.”
Failure: “□ Import failed” with a link to download error details.

3. Viewing & Managing Notifications:
Open the Inbox: Click □□ in the header to slide out your Notifications panel.

Read vs. Unread

1. Unread items are highlighted.
2. Clicking an item marks it as read and (when applicable) jumps you to the related record.

Persistent History: Notifications remain until you clear them—giving you a running log of all alerts.

Revision #5
Created 22 May 2025 20:06:53
Updated 13 September 2025 12:11:21