Notifications

A guide to switching on pop-up alerts and choosing which roles get told about what

Introduction

Data Fusion can pop up a short alert on screen when certain things happen — a new sales order comes in, a picking slip moves to its next stage, or a job card moves between processes. This means the right people can find out about an event as it happens, instead of having to keep checking a screen.

Notifications are controlled in two places: a single company-wide switch that turns the whole system on or off, and a set of tick-boxes on each role that decide which events that role's users are told about.

Before You Begin — Prerequisites

- Notifications must be switched on for the company (Company Configuration).
- The role(s) that should receive alerts must have the relevant notification tick-boxes ticked (Roles Settings).
- Users must have Data Fusion's Dashboard open in their browser to see pop-ups arrive — see "Understanding How Notifications Work" below.

Key Terms — Glossary

Term	What It Means
Notification	A short pop-up message telling a user that something they care about has just happened.
Send Notifications	The master switch on Company Configuration. If it's off, nobody in the company sees any pop-ups, no matter how their role is set up.
Role	The group a user belongs to (set up on Roles Settings). Every user in a role shares the same notification settings.
Notification tick-boxes	On Roles Settings, one tick-box per event type. Ticking a box means every user in that role gets a pop-up when that event happens.

Notification Events

Three events currently generate a pop-up notification:

Event	What Triggers It	Role Tick-Box
New Sales Order	A new sales order is picked up from Sage.	Notify Of New Sales Order
Picking Slip Status Change	A picking slip's status changes as it moves through processing — including when it's finally completed.	Notify On Picking Slip Status Change
Job Card Status Change	A job card moves to a new process or station. This also covers a production tracking line being moved between processes.	Notify On Job Card Status Change

The Full Workflow

1. Turn on notifications for the company. Go to Company Configuration and tick "Send Notifications", then save.
2. Go to Roles Settings and open the role that should receive alerts (or add a new one).
3. Tick the notification boxes for the events that role should be told about: New Sales Order, Picking Slip Status Change, and/or Job Card Status Change.
4. Save the role.
5. From then on, any user logged in under that role sees a pop-up on their Dashboard screen whenever one of the ticked events happens, anywhere in Data Fusion.
6. Click the pop-up to mark it as read. It will also fade away on its own after a few seconds either way — but see the note below about what "read" actually means.

Understanding How Notifications Work

- **Notifications are per role, not per user.** Ticking a box on a role sends that alert to every user currently logged in under that role — so a role that's shared by many people will mean many people get the same pop-up.
- **Pop-ups only appear while the Dashboard screen is open.** Data Fusion checks for new notifications automatically every 60 seconds while a user is sitting on the Dashboard. If a user is on another screen, or isn't logged in, they won't see the pop-up appear — though it will be waiting for them next time they're on the Dashboard.
- **"New Sales Order" alerts come from Data Fusion's regular Sage refresh.** Every 60 seconds, Data Fusion also quietly refreshes sales orders from Sage. If that refresh turns up an order nobody's seen before, that's what triggers the alert — so there can be up to a minute's delay between the order appearing in Sage and the pop-up appearing in Data Fusion.
- **Clicking the pop-up is what marks it as read.** If you let it fade away without clicking on it, it's still counted as unread and can appear again the next time Data Fusion checks.
- **Turning off "Send Notifications" doesn't stop events being tracked.** It only hides the pop-ups. If you switch it back on later, anything that happened while it was off — and hadn't been read — will appear at once.

Common Mistakes to Avoid

- **Ticking role boxes but never switching on "Send Notifications" for the company.** Both settings are needed — the company switch and the role tick-boxes.
- **Expecting a pop-up for every kind of stock movement.** Only new sales orders, picking slip status changes, and job card status changes currently generate a notification.
- **Expecting alerts while away from the Dashboard.** Pop-ups are only checked for and shown while the Dashboard screen is open in the browser.
- **Assuming a faded pop-up was read.** You need to click it — otherwise it will resurface on the next check.