

How To: Use Notifications



Vault: 210.829.7000 Fax: 210.824.6717 dfs41@thomasrepro.com <http://centraltexas.thomasrepro.com/dvdfs>

Notifications are only available to individuals with the proper permissions.

Sending a Notification

Prior to sending a notification, you should make sure that your Address Book contains the individuals that you will be sending the notification to. It will be easier to update your Address Book through My Account than from within the notification.

STEP 1: Access a project as if you were going to place an order.

STEP 2: Click on the **Details** tab (just above the project folders).

STEP 3: Click on **Create Notification**.

STEP 4: Select your notification type.

STEP 5: Fill in all of the fields on this first screen.

Note:

- The email address on this screen is your email address. □
- The notification name will also be the email subject line that all recipients will see in their inbox.
- It is NOT necessary to fill in any Fax Account Information.

STEP 6: Click **Continue** to go to the next screen and fill out all fields on this page.

Note: If you leave any fields empty, the email notification that goes out will be skewed and difficult to read. Be sure to fill out ALL fields.

STEP 7: Select the contact(s) that you want this notification to go to and add those individuals to the "Invited Contacts" list on the right. To do this, you will need to check the box next to each contact's name and click **Add to List**.

STEP 8: You can attach documents on this step. All attachments should be in PDF format and you should limit those attachments to under 2MB.

STEP 9: On the final step, you can review your information and click on the **Email** and/or **HTML** buttons to see what your contacts will be receiving via email/fax.

STEP 10: Click **Send Notification**.

Review Notifications

After sending a notification you can review it in the Notification Maintenance area to determine who it was sent to, who has viewed the notification and (in the event that you requested information back from them) their responses.

STEP 1: Click on the **My Account** button in the upper right-hand corner of any DFS screen.

STEP 2: Click on the **Notification Maintenance** link.

STEP 3: Click on the name of the notification that you wish to review.

Note: Naming notifications appropriately becomes very important at this stage. As you send more notifications it will become increasingly difficult to distinguish which one you wish to review.