

Notifications

Overview

This page controls when and how the system sends email and in-app notifications related to leads.

Notification Settings

Setting	Description
Send Email on Lead Creation	Sends an email automatically whenever a new lead is created.
Notify Time Before (in hours)	Sets how many hours in advance a reminder notification is sent before a scheduled action.

Delay Notifications

Delay notifications alert managers when a lead has gone too long without action.

“ **△ How Delay and Withdraw work together:** The delay timer starts first — once a lead becomes delayed (no action taken within the configured hours), the system begins sending delay notifications. After that, the **Withdraw** timer kicks in and the lead gets pulled from the salesman and moved to Lead Stock. In other words, delay notifications are the warning, and withdraw is the consequence. Make sure the delay hours are set to less than the withdraw hours in Withdraw Settings so the salesman gets notified before the lead is taken away.

SALES SETTINGS

Add Lead & Duplication State Action **Notifications** Rotation Withdraw CIL

Send Email On Lead Create ON

Notify time before (in hours)

delays Pending
 Following
 Coming-Visit
 Meeting

delays (Email) Follow up after meeting
 Unreachable
 Done-deal
 Cancelled

Delay notification within (hours)

Delay notification to managers after (in hours)

Email Notify For Sales When New Assign OFF

Send Email Notification to Salesman Manager when Lead is Assigned to salesman. OFF

Send Email Notification to Salesman Manager when Lead Action done by Assigned Salesman. OFF

Send Email Notification on Lead Action to Salesman and His Manager if action is taken by another User on the system OFF

Setting	Description
Delays (Notification Triggers)	Select which lead states trigger a delay notification.
Delays (Email Notifications)	Select which states trigger a delay email notification.
Within (hours)	How long a lead can be inactive before the first notification is sent. Default: 1 hour.
Notification to Managers After (hours)	How long before the manager is also notified. Default: 2 hours.

“ Delay notifications repeat every **30 minutes**. If set to 2 hours, the system sends **4 notifications** total before stopping.

Sales Assignment Email Notifications

Trigger	Who Gets Notified
New lead assigned	Salesman + their manager
Assigned salesman completes an action	Manager only
Another user takes action on the lead	Salesman + their manager

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