

Job Notification Template User Guide

Introduction

A job notification template is an email template that is used to send job notifications.

The job notification template will be automatically selected and used when the user sends the job notification for the job. We have filter criteria to filter which notification template is used at the time of sending the job notification for a specific job.

We are comparing the Country, Service, and Customer of the job notification template with appropriate job fields at the time of sending the job notifications and use the job notification template based on these criteria.

Functionality Overview

Create a New Job Notification Template

Follow the below steps to create new job notification templates

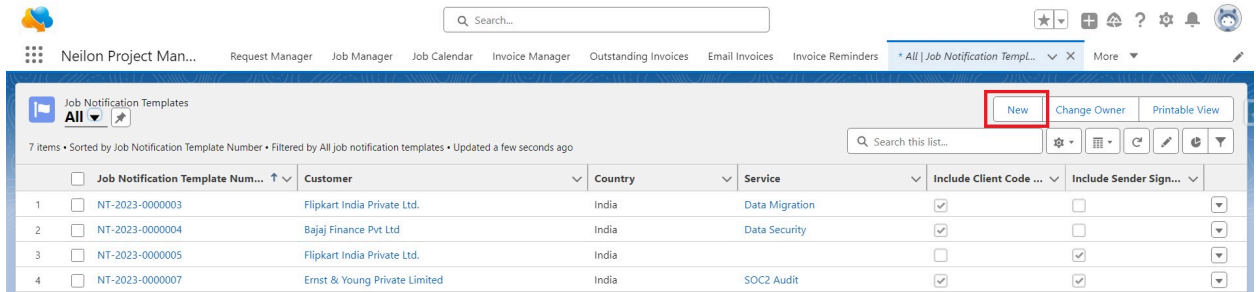
1. Navigate to the **Neilon Project Management** application from the App Launcher
2. Go to App Launcher
3. Search for the **Job Notification Templates** tab and click on it

The screenshot displays the Neilon Project Management application interface. At the top, there is a search bar and a navigation menu with tabs: Request Manager, Job Manager, Job Calendar, Invoice Manager, Outstanding Invoices, Email Invoices, Invoice Reminders, Review Invoice Feedbacks, and NEILON-JOB-72 | Job. A search bar is also present in the top right corner. Below the navigation menu, a search bar is visible with the text 'Job Notification Templates'. A dropdown menu is open, showing 'Apps' with 'No results' and 'Items' with 'Job Notification Templates' and a 'View All' link. The main content area shows a table of requests. The table has columns: Request#, Requester N..., Requester Email, Creat..., Requested By, Job Entity Name, Job..., T..., Al..., H..., Tot..., and Status. The table contains four rows of data, each with a checkbox and a dropdown arrow in the first column. The status of the requests is 'Quote Sent', 'Quote Sent', 'Won', and 'Won'.

	Request#	Requester N...	Requester Email	Creat...	Requested By	Job Entity Name	Job...	T...	Al...	H...	Tot...	Status
☐	REQ-2024-0001825	Shyam Rajput	srajput@amazon.com	19-Feb-20...	Amazon	Ajanta Tech	5,000	200	1,500	500	7,200	Quote Sent
☐	REQ-2024-0001826	Gourav More	gmore@perficienttechnologies.com	19-Feb-20...	Perficient Pvt Ltd	Bee Basket Solutions Pvt Ltd	8,000	100	1,300	300	10,400	Quote Sent
☐	REQ-2024-0001822	James Garfield	jgarfield@myntradesigns.com	06-Feb-20...	Myntra Designs Pvt Ltd	ASOS Pvt Ltd	5,000	700	405	200	6,405	Won
☐	REQ-2024-0001821	Rupesh Desai	desairupesh@click2cloud.com	06-Feb-20...	Click2cloud Services Pvt Ltd	Goneka Pvt Ltd	700	50	300	60	1,510	Won

4. It will show a list of all the job notification templates available in your org

- Click on the **New** button to create a new job notification template



- It will open the UI where you can set the desired values for a new job notification template
- Here you can set the Country, Service, and Customer for a new job notification template in the **Detail** section.

The screenshot shows the 'New Notification Template' form. The 'Detail' section is highlighted with a red box. It contains three dropdown menus: 'Country' (set to India), 'Service' (set to Financial Audit), and 'Customer' (set to eBorn Communication Labs Pvt Ltd). Below the 'Detail' section, there's a 'Send To' section with checkboxes for 'Send to Job Entity Contact?', 'Send to Program Contact?', 'Send to Licensee Contact?', and 'Send to Other Contacts'. There are also checkboxes for 'Send to Vendor Contact?', 'Send to Agent Contact?', and 'Send to Other Payer Contact?'.

Note: The job notification template will be automatically selected and used when we send the job notification for the job using these three fields. We have filter criteria to filter which notification template is used at the time of sending the job notification for a specific job. We are comparing the Country, Service, and Customer of the job notification template with appropriate job fields at the time of sending the job notifications and use the job notification template based on these criteria. Contact Neilon support team for more information

- Set checkbox values to true to whom you want to send the job notifications when this template is used to send job notifications in the **Send To** section. The same applies to **CC To** and **BCC To** sections as well.
- Add a Subject and Body for the job notification template in the **Notification** section

Notification

Subject

Notification for Upcoming Audit from Royal India Private Limited

Select Merge Field

--None--

Body

Salesforce Sans 12 B I U S

Dear {!NEILON1__Job_Entity_Contact__c},

This is {!User.Name} from Royal Indi Private Limited.
We have been requested by {!NEILON1__Customer__c} to perform an audit of your company. We will be auditing your company in the next few days. Below are the audit details. Please prepare your team for the audit.

Job#: {!NEILON1__Job_No__c}
Start Date: {!NEILON1__Job_Start_Date__c}
End Date: {!NEILON1__Job_End_Date__c}

If you have any queries, feel free to reach out. My email is {!User.Email}.
Thanks & Regards,
{!User.Name}

☐ Include Client Code Of Conduct? ☐ Include Sender Signature?

10. You can select and add the merge field in the subject and body using the **Select Merge Field** dropdown. When you select any merge field from the dropdown it will show the **Merge Field API Name** and you can simply copy and use it in the subject and body

Notification

Subject

Notification for Upcoming Audit from Royal India Private Limited

Select Merge Field

Job Entity City

Merge Field API Name

{!NEILON1__Job_Entity_City__c}

Body

Salesforce Sans 12 B I U S

Dear {!NEILON1__Job_Entity_Contact__c},

This is {!User.Name} from Royal Indi Private Limited.
We have been requested by {!NEILON1__Customer__c} to perform an audit of your company. We will be auditing your company in the next few days. Below are the audit details. Please prepare your team for the audit.

Job#: {!NEILON1__Job_No__c}
Start Date: {!NEILON1__Job_Start_Date__c}
End Date: {!NEILON1__Job_End_Date__c}

If you have any queries, feel free to reach out. My email is {!User.Email}.
Thanks & Regards,
{!User.Name}

☐ Include Client Code Of Conduct? ☐ Include Sender Signature?

11. Set the **Include Client Code Of Conduct?** checkbox to true if you want to add a code of conduct document to the job notification email
12. Set the **Include Sender Signature?** checkbox to true if you want to add the sender's signature to the job notification email
13. If you want to add attachments or a code of conduct document then you can upload them via the **Upload Files** button in the **Attachments** section

14. You can save or preview the job notification template using the **Save** or **Preview** button

Body

Salesforce Sans 12

Dear {NEILON1__Job_Entity__Contact__c},

This is {User.Name} from Royal Indi Private Limited.
We have been requested by {NEILON1__Customer__c} to perform an audit of your company. We will be auditing your company in the next few days. Below are the audit details. Please prepare your team for the audit.

Job#: {NEILON1__Job_No__c}
Start Date: {NEILON1__Job_Start_Date__c}
End Date: {NEILON1__Job_End_Date__c}

If you have any queries, feel free to reach out. My email is {User.Email}.
Thanks & Regards,
{User.Name}

☐ Include Client Code Of Conduct? ☐ Include Sender Signature?

Attachments

[Upload Files](#) Or drop files

[Save](#) [Preview](#) [Cancel](#)

15. Follow the below steps to understand how the job notification template preview works

Preview Job Notification Template

1. Go to App Launcher.
2. Search for the **Job Notification Templates** tab and click on it

Neilon Project Man... Request Manager Job Manager Job Calendar Invoice Manager Outstanding Invoices Email Invoices Invoice Reminders Review Invoice Feedbacks NEILON-JOB-72 | Job

Search...

Job Notification Templates

No results

Items

Job Notification Templates

View All

Search

Show All Records

Add Filter

Remove All

Requests (43)

New Request Send Quote

	Request#	Requester N...	Requester Email	Creat...	Requested By	Job Entity Name	Job...	T...	Al...	H...	Tot...	Status
☐	REQ-2024-0001825	Shyam Rajput	srajput@amazon.com	19-Feb-20...	Amazon	Ajanta Tech	5,000	200	1,500	500	7,200	Quote Sent
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☐	REQ-2024-0001821	Rupesh Desai	desairupesh@click2cloud.com	06-Feb-20...	Click2cloud Services Pvt Ltd	Goneka Pvt Ltd	700	50	300	60	1,510	Won

3. It will show a list of all the job notification templates available in your org

Job Notification Templates

All

7 items • Sorted by Job Notification Template Number • Filtered by All job notification templates • Updated a few seconds ago

Search this list...

New Change Owner Printable View

	Job Notification Template Num...	Customer	Country	Service	Include Client Code ...	Include Sender Sign...
☐	NT-2023-0000003	Flipkart India Private Ltd.	India	Data Migration	☒	☐
☐	NT-2023-0000004	Bajaj Finance Pvt Ltd	India	Data Security	☒	☐
☐	NT-2023-0000005	Flipkart India Private Ltd.	India		☐	☒
☐	NT-2023-0000007	Ernst & Young Private Limited	India	SOC2 Audit	☒	☒
☐	NT-2023-0000008	Haldiram Foods International Pvt Ltd	India	Data Migration	☒	☐
☐	NT-2024-0000009	Patil foundation Pvt Ltd	India		☐	☐
☐	NT-2024-0000012	eBorn Communication Labs Pvt Ltd	India	Financial Audit	☐	☐

4. Open the job notification template details by clicking on its name
5. Go to the **Preview** section (If this section is not available then ask your admin to add the section and preview component on this page)

The screenshot shows the 'Job Notification Template' details page for template 'NT-2024-0000012'. The 'Preview' tab is active. The main section is titled 'Preview Initial Notification' with the instruction 'Select job & provide test email address to send test notification'. Below this is the 'Job for Notification' section, which includes a search bar for jobs and a text field for the test email address, currently containing 'apatinge@neilontechnologies.com'. There are also expandable sections for 'Send To' with fields for Job Entity Contacts, Vendor Contacts, Program Contacts, Agent Contacts, Licensee Contacts, and Other Payer Contacts. On the right side, there is a 'Files (0)' section with an 'Upload Files' button, and a 'Job Notification Template History (1)' section showing a single entry with details like Date, Field, User, Original Value, and New Value.

6. Now choose a job for which you want to preview the template. After selecting a job, it will show field values using the job data

This screenshot shows the same 'Job Notification Template' details page, but now a job has been selected. The 'Job for Notification' section is highlighted with a red box, showing the 'Job' field with the value 'NEILON-JOB-106'. The 'Test Email Address' field still contains 'apatinge@neilontechnologies.com'. The 'Send To' section is also visible, showing fields for Job Entity Contacts, Vendor Contacts, Program Contacts, Agent Contacts, Licensee Contacts, and Other Payer Contacts. The 'Job Entity Contacts' field now contains the same email address as the test email address.

7. The current logged-in user email will be set in the **Test Email Address** field. The test email will be sent to emails you enter in the **Test Email Address** field. You can add multiple emails as well separating by a semicolon (;) (for example sales@amazon.com;support@flipkartindia.com;amitmishra@gmail.com).
8. Click on the **Send** button at the bottom

9. Test job notification for the selected job will be sent to those email addresses in the **Test Email Address** field