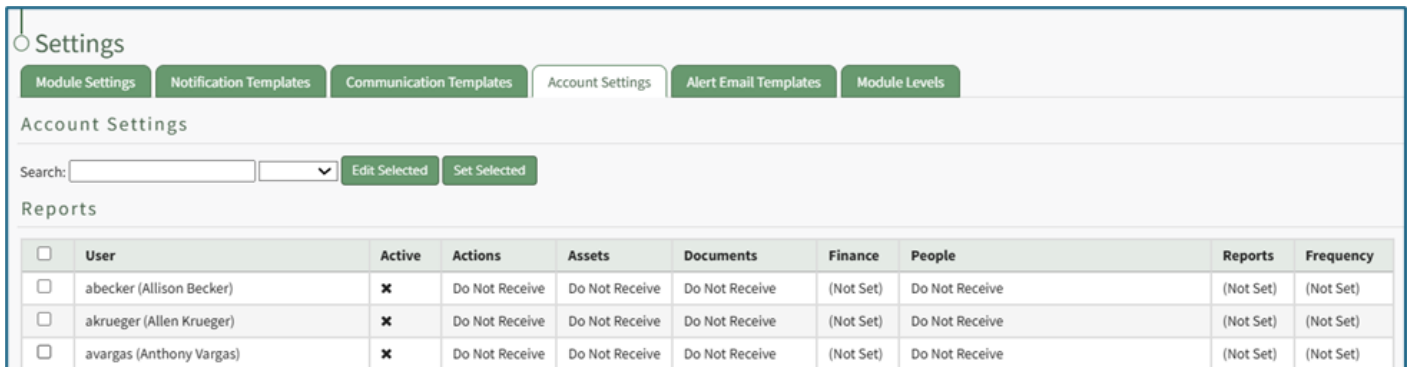


# Apply a Notification Template to Existing Accounts

To apply notification templates to existing accounts, go to the Account Settings Tab on the Settings Page of the Communications Module.



Settings

Module Settings Notification Templates Communication Templates Account Settings Alert Email Templates Module Levels

Account Settings

Search:

Reports

<input type="checkbox"/>	User	Active	Actions	Assets	Documents	Finance	People	Reports	Frequency
<input type="checkbox"/>	abecker (Allison Becker)	✘	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)
<input type="checkbox"/>	akrueger (Allen Krueger)	✘	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)
<input type="checkbox"/>	avargas (Anthony Vargas)	✘	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)

Select the existing user accounts you wish to apply the notification template to.

## How To: Create New Notification Templates

Note: A default new user Notification Template already exists in the system. This template can be edited for your preferences.

## How To: Edit New User Notification Templates

To edit new user notification templates, go to the Notification Templates Tab on the Settings Page of the Communications Module.

- Module Settings
- Notification Templates
- Communication Templates
- Account Settings
- Alert Email Templates
- Module Levels

### Notification Templates

Default template to use for new accounts:

Add Notification Template

Title	Description	Actions
Default New User		
Admins with Reports		
District Managers	This is the preferred notification settings for District Managers.	

Existing templates will be shown in the Notification Template Table.

Select the edit icon in the action column of the template you wish to edit opening the Edit Notification Template Page.

- Module Settings
- Notification Templates
- Communication Templates
- Account Settings
- Alert Email Templates
- Module Levels

### Edit Notification Template

**Template Name**

**Template Description**

A notification template is comprised of two parts: Reports and Alerts.

Indicate the desired status for email report notifications: Not Active or Active.

Reports

Status

Actions

Assets

Documents

Finance

People

Reports

**Email Report Frequency**

Daily  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Weekly  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Monthly

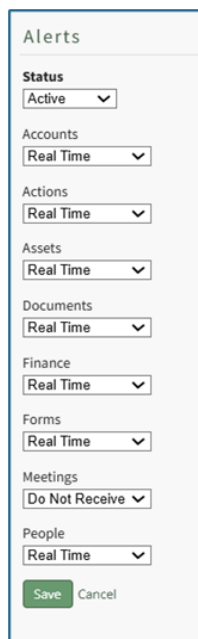
\* Months that do not have these days will instead be sent on the last day of the month

Alter the desired reports selected for each module or leave as “Do Not Receive”.

Email Report Frequency has three options: daily (or on specified days of the week), weekly (on the day of your choosing), or monthly (which requires the user to specify which numerical day of the month from a dropdown menu you wish to receive the report summary).

After setting template preferences for reports, scroll down to set template preferences for email alerts.

Alter email preferences as set by module through a dropdown menu with three options that designate when an email alert should be sent: “Real Time”, “Digest”, and “Do Not Receive”.



The screenshot shows a settings panel titled "Alerts". It contains several dropdown menus for different modules: Status (Active), Accounts (Real Time), Actions (Real Time), Assets (Real Time), Documents (Real Time), Finance (Real Time), Forms (Real Time), Meetings (Do Not Receive), and People (Real Time). At the bottom of the panel are "Save" and "Cancel" buttons.

After making edits to your preferences for both Email Report and Email Alert Settings, select “Save”, returning you to the Notification Templates Tab on the Settings Page of the Communications Module.

The newly created notification template will now be shown on the Notification Template Table.

To create a new notification template, go to the Notification Templates Tab on the Settings Page of the Communications Module.

Settings Communications > Settings > Notification Templat

Module Settings Notification Templates Communication Templates Account Settings Alert Email Templates Module Levels

### Notification Templates

Default template to use for new accounts: Default New User ▾

Add Notification Template

Title	Description	Actions
Default New User		
Admins with Reports		

Select the “New Notification Template” button, opening the Edit Notification Template Page.

Settings Communications > Settings > Notification Templates > Edit Templat

Module Settings Notification Templates Communication Templates Account Settings Alert Email Templates Module Levels

### Add Notification Template

**Template Name**

Template Description

Input a name for the new Notification Template as well as a description.

A notification template is comprised of two parts: Reports and Alerts.

Indicate the desired status for email report notifications: Not Active or Active.

KAStrack generates and sends reports for the following modules: Actions, Assets, Documents, Finances, and People, and Reports.

Reports

**Status**  
Not Active ▾

**Actions**  
Do Not Receive ▾

**Assets**  
Do Not Receive ▾

**Documents**  
Do Not Receive ▾

**Finance**  
Do Not Receive ▾

**People**  
Do Not Receive ▾

**Reports**  
(Do Not Change) ▾

**Email Report Frequency**

**Daily**  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

**Weekly**  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

**Monthly** ▾

\* Months that do not have these days will instead be sent on the last day of the month

Alter the desired reports selected for each module or leave as “Do Not Receive”.

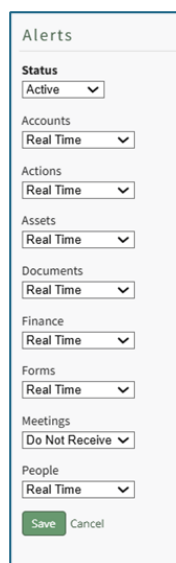
Daily email report notifications can be sent everyday of the week, or on specific days. Select the appropriate checkboxes to indicate your preference.

Selecting a weekly email report notification requires you to indicate which day of the week you prefer the report summary email to be sent.

Selecting a monthly frequency requires the user to specify which numerical day of the month from a dropdown menu you wish to receive the report summary. The days that are not included in every month (29, 30, 31) have an asterisk next to them. If the current month does not have that particular date, the system will send the report on the final day of the month.

After setting template preferences for reports, scroll down to set template preferences for email alerts.

KAStrack sends email alerts for the following modules: Accounts, Actions, Assets, Dispatch, Documents, Finance, Forms, Meetings, and People. Each module has a dropdown menu with three options that designate when an email alert is sent: “Real Time”, “Digest”, and “Do Not Receive”.



Alerts

Status  
Active

Accounts  
Real Time

Actions  
Real Time

Assets  
Real Time

Documents  
Real Time

Finance  
Real Time

Forms  
Real Time

Meetings  
Do Not Receive

People  
Real Time

Save Cancel

Real Time is the default setting that sends email alerts in real time.

Digest is KAStrack’s delayed timing feature. Selecting “Digest” will summarize all alerts with this designation to be sent daily between midnight and 4 a.m. Central Time (United States). As noted in KAStrack, alert digests are not applicable to all alerts.

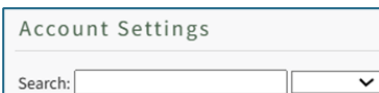
Whether or not an alert is digestible can be customized on the Alert Email Templates Tab of the Communications Module.

Do Not Receive designates that the user does not wish to receive email alerts about that specific module.

Communications sent from users are always sent in real time

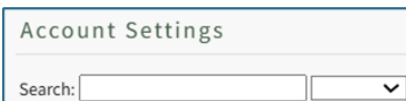
After selecting your preferences for both Email Report and Email Alert Settings, select “Save”, returning you to the Notification Templates Tab on the Settings Page of the Communications Module.

The newly created notification template will now be shown on the Notification Template Table.

A screenshot of a web interface titled "Account Settings". Below the title is a search bar with the label "Search:" followed by a text input field and a dropdown menu with a downward arrow.

The Search textbox simplifies the search for specific users. The dropdown menu allows you to select between active / inactive users. If you wish to edit all user accounts with the same new settings, select the checkbox in the title row of the table to select all users in the table. Selecting a user in one table automatically selects them in the other.

Select the “Set Selected” button opening the Update Account Settings Modal.

A screenshot of a web interface titled "Account Settings". Below the title is a search bar with the label "Search:" followed by a text input field and a dropdown menu with a downward arrow.

The existing notification templates will show in the dropdown menu. Select the template you wish to apply to the selected user accounts.

Select “Save” for the notification template to be applied. Click “Cancel” to return to the Account Settings Tab on the Settings Page with any user accounts being impacted.

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Revision #3

Created 2025-11-23 22:39:35 UTC by Mitzi Orkus

Updated 2026-01-23 18:29:32 UTC by Mitzi Orkus