

## Email Notifications for External Acceptance


This document will cover how to activate external acceptance email notifications, generating these notifications, along with a short instruction for external stakeholder navigation of this feature.

### (a) External Acceptance Email Activation

Emailed notifications for acceptance can be sent to external stakeholders who are not users of the MBO platform. These can be especially useful for ensuring external stakeholders are informed, and for receiving their digital signature for safety, permitting, and other reporting purposes.

External stakeholders will receive an email with a PDF copy of the activity report from Muddy Boots, along with a link to mark the report as accepted or rejected. The Acceptance Summary section of the record in Muddy Boots will display one of the following statuses: pending, accepted, or rejected.

The screenshot displays the Muddy Boots online interface. At the top, the navigation bar includes the logo 'muddyboots.online', several utility icons, and the user name 'Mitchell Bolt'. Below the navigation bar, the breadcrumb trail shows 'ALL AREAS / MUDDY BOOTS INC. / ACTIVITY OPTIONS'. The main content area is titled 'Activity Options' and features a search bar with the text 'Pre-Use Overhead Crane Inspection'. A table below the search bar has two columns: 'Activity Label' and 'Applies To'. The first row contains 'Pre-Use Overhead Crane Inspection' and 'CRANE'. To the right of the table, a sidebar menu is open, listing various administrative options. The 'Operations Admin' option is highlighted with a red circle containing the number '1'. Below 'Operations Admin', the 'Activity Options' option is highlighted with a red box. Other options in the sidebar include 'Mark as Homepage', 'My Profile', 'My Downloads', 'Maintenance Admin', 'Workflows', 'Company Admin', 'Activities Admin', 'MBO', and 'Logout'.

- **1** To activate this functionality on specific reports, navigate to Activity Options under the Operations Admin heading.
- Search for and accept the activity type for enabling this functionality and click .

muddyboots.online Summary Master Data Schematics Scheduler Ops/Maintenance

ALL AREAS / MUDDY BOOTS INC. / ACTIVITY OPTIONS / EDIT PRE-USE OVERHEAD CRANE INSPECTION

## Edit Pre-Use Overhead Crane Inspection - CRANE

**Fields**

**Sites**

**Equipment**

**Options**

No Always on Runsheet? ⓘ

Yes Allow Attachments? ⓘ

No Only Once per Day? ⓘ

Yes Can be Scheduled? ⓘ

No Email For External Acceptance? ⓘ **1**

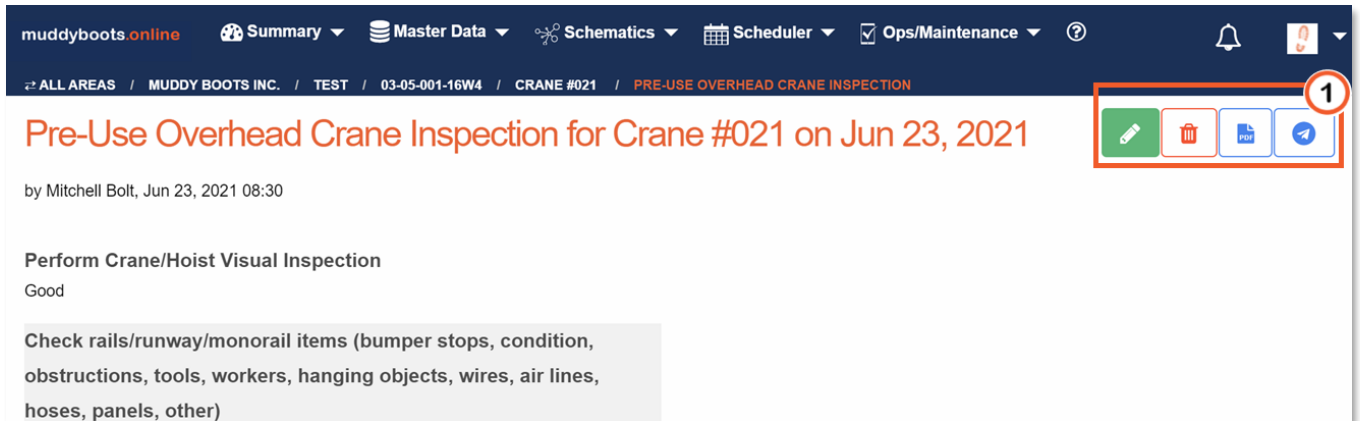
**Description/Instructions**


This static text will appear at the beginning of each activity form and is saved to each completed activity. Updating this text will not affect historical records.

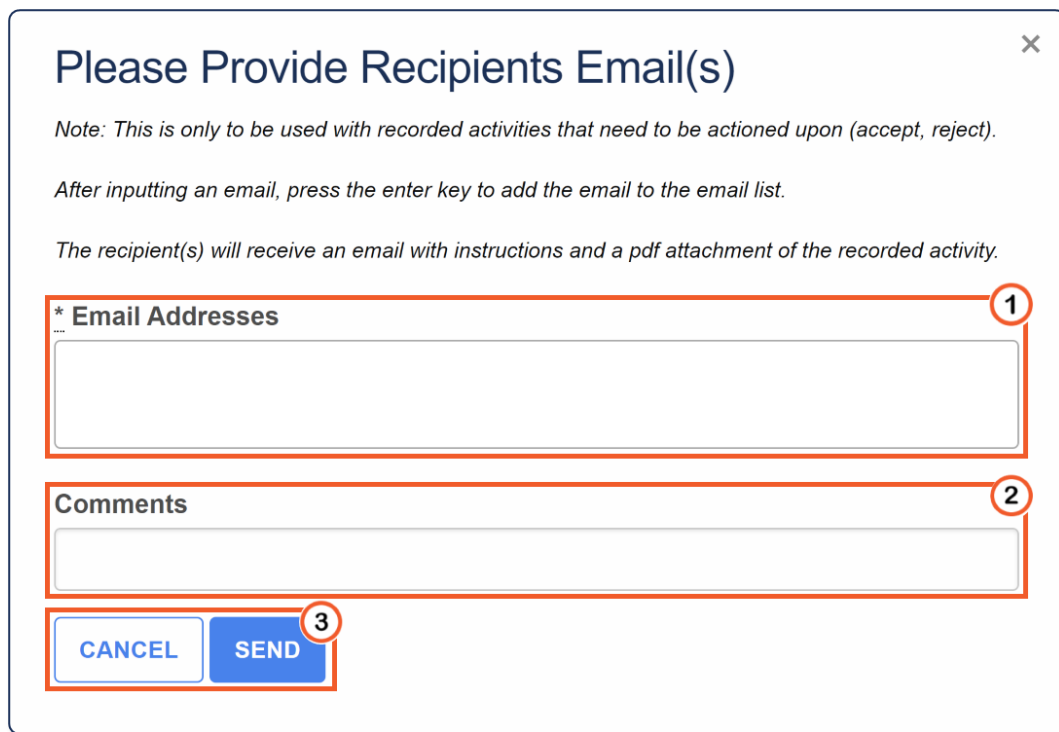
**2**


- **1** Click the **Email For External Acceptance?** Toggle to Yes.
- **2** Click . The functionality has now been enabled for the specific report selected.

(b) External Acceptance Email MBO User Initiation

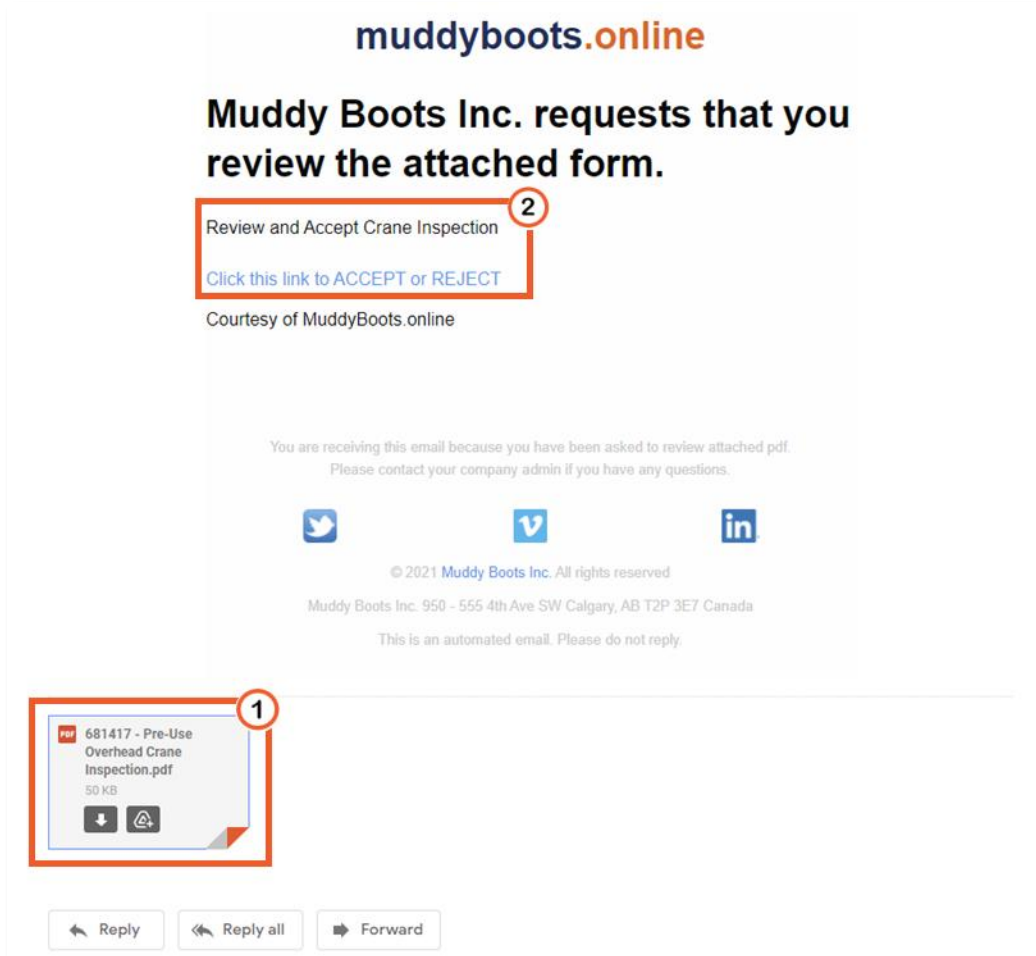


- **1** When viewing completed reports, click the  button to enter the external email addresses. Once selected, a pop-up window will appear.



- **1** Enter the email addresses of individuals that are required to accept the report.
- **2** Add any comments necessary for communication of this request.
- **3** Click . The external stakeholder will now receive an email to accept or reject the pdf report received.

(c) External User Instruction for Accepting / Rejecting Emailed Forms



- Open the email received from muddyboots.online.
- ① Review the pdf report received via email.
- ② Read the included email comment and click the link to Accept or Reject the attached report. This will open a webpage where an acceptance or rejection can be completed.

Muddy Boots Inc.

Please make your selection below:

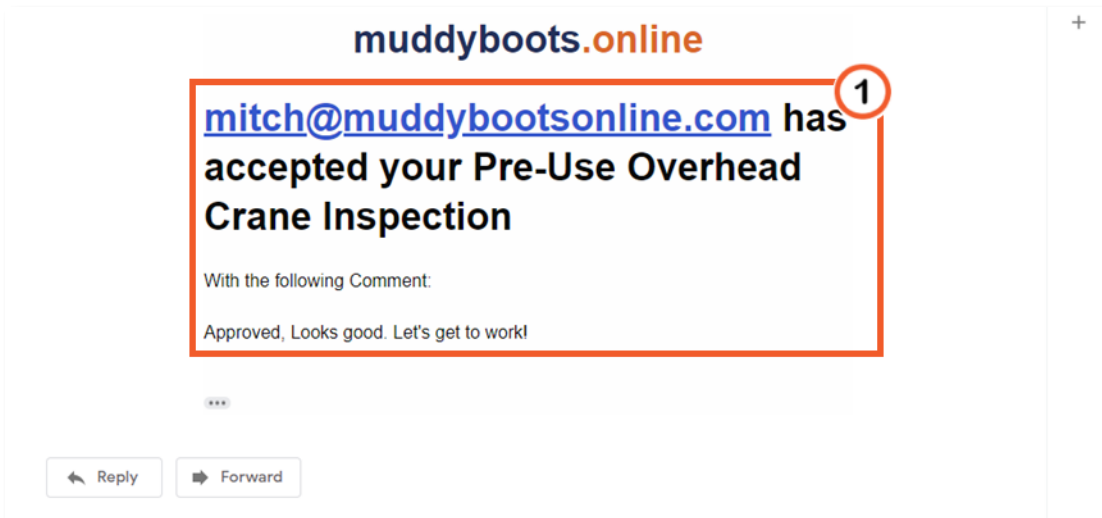
Please leave a comment:

ACCEPT

Please give a reason:

REJECT

- 1 Accept or reject the report and include any relevant comments or rejection reasons.



- 1 The person who initiated the email will receive a response with the acceptance or rejection comment, this will also be visible at the bottom of the report in the Acceptance Summary (shown below).

Acceptance Summary

1. Accepted, By: mitch@muddyboots.online, At: Monday, July 19, 2021 13:14, Sent At: Monday, July 19, 2021 13:14, With Comment: Approved, Looks good. Let's get to work!

Work Orders +

CHOOSE FILES...