Got it — I'll write this in the **help file style** you've been using for Costbars, so it reads like an in-app guide and matches the tone of your other documentation. I'll structure it in **four sections**: overview, entering threshold rules, testing & validating, and detailed settings reference.

Configuring Notification Thresholds and Alerts

Overview

The **Notification & Escalation Settings** in Costbars allow you to define exactly when a project's status will trigger an alert. This gives portfolio managers the ability to send timely, relevant notifications to executives and other stakeholders when projects begin to show risk indicators.

By combining **threshold rules**, **delivery preferences**, and **escalation paths**, you can make sure the right people are alerted at the right time, without overwhelming them with noise.

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1. Entering Threshold Rules

1. **Open the Notifications Page** Go to **Admin → Notifications** from the main menu.

2. **Add or Edit a Notification Profile**

   - Click **Add Notification** to create a new profile for a stakeholder.
   - Or, click **Edit** on an existing profile to adjust rules.

3. **Set Core Contact Details** Enter the manager's name, phone number, and email address. This ensures alerts can be delivered across multiple channels.

4. **Select the Primary Channel** Choose **SMS**, **Push Notification**, or **Email** as the main delivery method. Optionally, set a secondary channel as a backup.

5. **Set Your Threshold Values** Under the **Thresholds** tab, enter numeric or selection-based values for each monitoring category (detailed in the table below).

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2. What the Rules Are

Threshold rules tell Costbars **when to trigger a notification** based on live project data. You can set limits for:

Rule	What It Monitors	Example Use Case
Days Overdue Threshold	Compares actual dates to planned baseline dates	Alert if a project slips more than 5 days
Budget Overrun %	Compares forecast cost to budget	Notify if costs exceed budget by 15%
Overall Health	Uses Green/Yellow/Red status from project data	Flag any project marked Red

Rule	What It Monitors	Example Use Case
Executive Commitment	Based on recorded executive support level	Alert if commitment drops below “Strong”
Risk/Size/Complexity	Uses risk scoring from the project’s detail form	Ignore small/simple projects; flag high-risk
Strategic Value %	Uses strategic scoring from portfolio analysis	Flag if value > 70% and project is at risk
Likelihood of Success %	Uses risk scoring from Costbars client	Flag if likelihood < 40%

3. Testing Your Configuration

Before enabling automatic delivery, always **test your rules**:

1. On the Notifications page, locate the **Notification Testing & Message Generation** section.
2. Click **Run Manual Test**. Costbars will:
    - Evaluate all active projects against your configured thresholds.
    - Show a summary of flagged projects and which managers would be notified.
    - Generate the exact notification message for each recipient.
3. Review results:
    - Check **Flagged Projects** to confirm they match your expectations.
    - Preview messages to ensure clarity and relevance.
4. If results are too noisy or too quiet, return to the thresholds tab and adjust values.
5. Once satisfied, leave the profile **Active** to allow automated alerts.

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4. Detailed Settings Reference

Basic Info Tab

- **Manager Name / Email / Phone** – Required contact details for delivery.
- **Timezone** – Aligns delivery windows to recipient’s local time.

Preferences Tab

- **Primary Channel** – Main delivery method (SMS, Push, Email).
- **Secondary Channel** – Backup channel if the first is unavailable.
- **Quiet Hours Start / End** – No notifications sent during this time (except executive escalations).
- **Business Hours Only** – Restrict non-critical alerts to working hours.
- **Weekend Notifications** – Allow or block weekend sends.
- **Cooldown Hours** – Minimum time between alerts for the same recipient.
- **Max Notifications Per Day** – Limit the number of alerts in 24 hours.

Thresholds Tab

See the rules table above for each metric's meaning and how it's used.

Escalation Tab

- **Enable Escalation** – Turns on SMS to executives for critical projects.
- **Escalation Delay Hours** – How long to wait before escalation after primary alert.
- **Max Escalation Attempts** – How many times to retry escalation.
- **Escalation Phone** – Destination number for executive escalation.

Best Practices

- Start with **looser thresholds** and tighten them once you've observed real-world behavior.
- Use **Manual Test Mode** frequently when changing thresholds.
- Keep **executive escalation** reserved for high-impact projects to maintain credibility of alerts.
- Document your chosen settings so your team understands the logic behind alerts.

If you want, I can now **merge this into your existing Costbars help file** from the other chat so the style, formatting, and navigation links match perfectly. That way it's a seamless addition. Would you like me to do that next?