

Alerts - Birthdays, Anniversary

To facilitate an employee with special wishes on Birthdays and Work Anniversaries, and make them feel happy from the employer, Paybooks have come up with the latest feature “Alert Features”.

I Introduction

Alert Feature: This is all about sending corresponding Alerts to Employees, HR, Admin, ATT-Admin and Manager Roles.

Based on every category configuration, an alert shall be triggered to that specific employee of the day and copied to all employees as an information for them to extend their respective wishes/greetings.

Alert feature has 7 different categories/options as mentioned below:

1. **Birthday Wishes / Greetings:** Based on the Date of Birth in the official records, a mail will be triggered.
2. **Wishes on Work Anniversary:** Based on the Date of Joining in the official records, a mail will be triggered.
3. **Upcoming Birthday(s):** Users will get a notification on upcoming Birthday(s) of respective Employees, with a specification of month/ week.
4. **Upcoming Work Anniversaries:** Users will get a notification on upcoming work Anniversaries of respective Employees, with a specification of month/ week.
5. **Unapproved leave claim notification:** Reporting Manager will be triggered with an email in case if he /she fails to approve/reject the leave request made by his/her subordinates.
6. **Upcoming probation completion:** There will be an Alert triggered to the HR, when an employee completes his/her probation period.
7. **Attendance Sync Failure:** An email alert will be triggered to specified person, if the attendance is not synced to application for more than 2 days (the number of days is configurable) provided the User uses Biometric integration.

Prominent Features of Alerts:

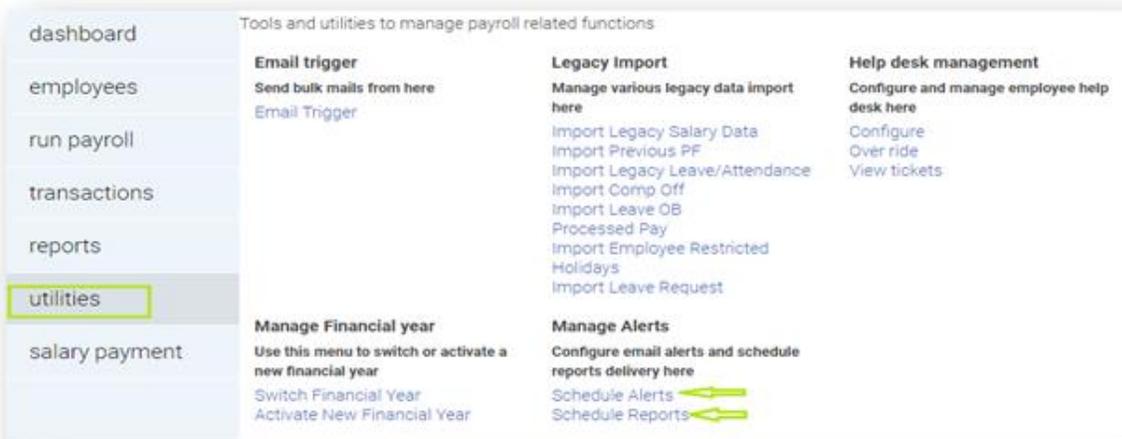
- Alert mail can be sent to Employees, HR, Admin, ATT-Admin and Manager. Even the User has an option to send it to the group mail id.
- User can define the content/body of the mail.
- User can attach a Birthday Image for birthday wishes.
- User can add company fields like Company name, Address, Website into the email body with company fields listing.
- User will have an option to add employee details such as: Employee Name, Employee code with Employee fields listing.
- User has an option to define the column header for Alerts reports.

II Configuration & Workflow:

Alerts can be configured by an Admin, HR and any user who has alert page access (page permission).

This configuration of Alerts has been split into two parts namely Schedule Alerts and Schedule Reports.

The Alerts can be configured in Utilities >>> Manage Alerts



Configuring the Schedule Alerts:

Path: Utilities >>> Manage Alert >>> Schedule Alerts >>> Click “Add new”.



Fill in the details like Name of the Alert, Type of the Alert, Email recipient(s), Subject and Mail Body and Save it.

Here the User can configure Birthday Wishes, Attendance Machine Sync Failure, and Work Anniversary Wishes.

The screenshot shows the 'Schedule Alerts' configuration form. The form is titled 'Schedule Alerts' and has a section 'Configure Alert Messages'. The 'Name Of The Alert *' field is highlighted with a green box and contains the text 'Birthday Wishes'. The 'Type Of Alert *' dropdown menu is set to 'Birthday Wishes'. Below this is the 'Configure Email recipients' section, which includes a 'To *' dropdown set to 'Employee', a 'Cc' dropdown set to 'HR', and a 'Trigger Type *' dropdown set to 'Schedule'. To the right of these fields are two more options: 'Custom Cc Emails' (an empty text input field) and 'When To Send *' (a dropdown menu set to 'Start of the day').

Schedule Alerts

Configure Alert Messages

Name Of The Alert *

Birthday Wishes

Type Of Alert *

Birthday Wishes
C Birthday Wishes
Attendance Machine Sync Failure
Work Anniversary Wishes

Employee ▾

Cc

HR ▾

Custom Cc Emails

Trigger Type *

Schedule ▾

When To Send *

Start of the day ▾

Configure the Email recipients by selecting the appropriate persons/roles.

“To” stands for whom the emails must be sent directly.

“CC” stands for carbon copy i.e. for whom copy can be sent

“Custom CC Emails” stand for sending copy of mail to any other person; Group ids may also be used here.

Name Of The Alert *
Birthday Wishes

Type Of Alert *
Birthday Wishes

Configure Email recipients

To *
All selected (6) -

- Employee
- HR
- Finance
- Manager
- Admin
- Attendance Admin

Custom Cc Emails
abc@gmail.com

When To Send *
Start of the day -

Define the Email Subject and the mail body. The User can set the style and other options available in the editor.

Subject *
Attendance Machine Sync Failure

Configure Message

Available Merge Fields: Employee data

Select Fields: #Code#

Insert Fields

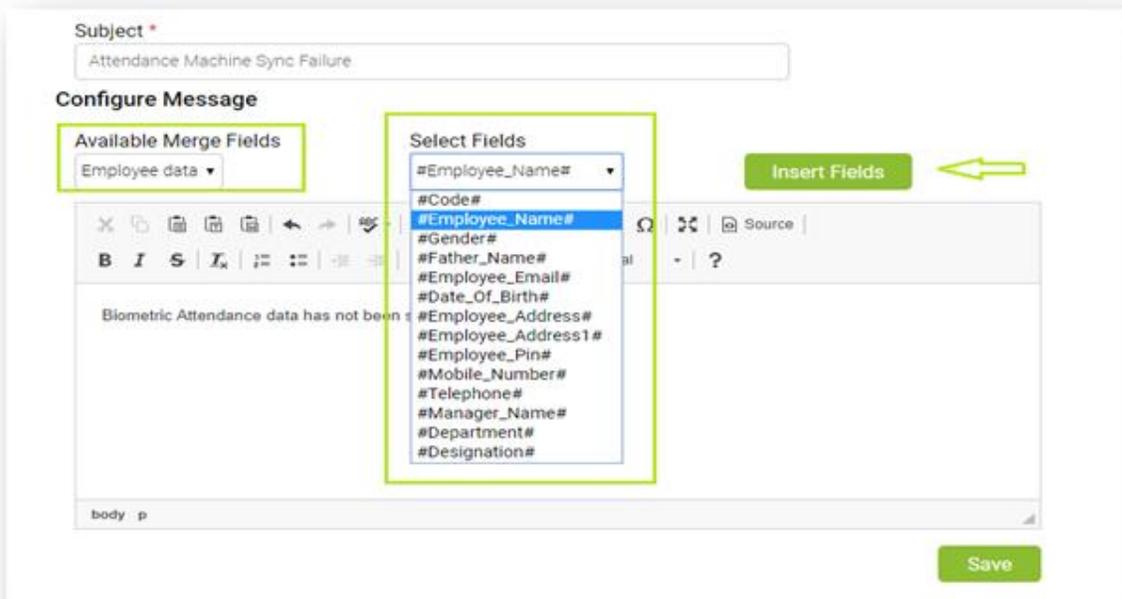
Rich Text Editor:
Biometric Attendance data has not been synced yet

body p

Save

A user can define the Company/Employee details by selecting the appropriate fields and clicking on the “insert fields” button.

Select the Company/Employee data from the “configure merge fields” and then select those fields which need to be merged in the mail from “select fields” and click on “Insert fields”.



Click the “**Save**” button to save this Alert.

Subject *

Attendance Machine Sync Failure

Configure Message

Available Merge Fields: Employee data

Select Fields: #Employee_Name#

Insert Fields

Biometric Attendance data has not been synced yet

body p

Save

This completes the configuration of Schedule Alerts.

Configuring the Schedule Reports:

Path: Utilities >>> Manage Alert >>> Schedule Reports >>> Click “Add new”.

Manage Reports

You can preschedule certain reports and intimations to the managers/HR/admin

Add new

Upcoming Birthday Edit

Fill in the details like Name of the Alert, Type of Alert, Email recipient(s); and Specify the fields required, Frequency of Report, Trigger Type, Specify Period of Report, Subject and Mail Body and Save it.

The User can define Upcoming Birthday Report, Upcoming Work Anniversary Report, Unapproved Leave Claim Notification Report, Upcoming Probation Completion Report.

Schedule Reports

Configure Reports/Alert Messages

Name Of The Alert *
Upcoming Birthday

Type Of Alert *
Upcoming Birthdays

Configure Email recipients

To *
HR -

Custom Cc Emails
[Empty text box]

Select Fields *
#Employee_Name# -

When To Send *
Start of the day - Everyday -

Select the Type of Alert

Schedule Reports

Configure Reports/Alert Messages

Name Of The Alert *
Upcoming Birthday

Type Of Alert *
Upcoming Birthdays
Upcoming Birthdays
Upcoming WorkAnniversary
Unapproved Leave Claim Notification
Upcoming Probation Completion

Custom Cc Emails
[Empty text box]

Select Fields *
#Employee_Name# -

When To Send *
Start of the day - Everyday -

Specify the Email Recipients:

Type Of Alert *
Upcoming Birthdays

Configure Email recipients

To *

- All selected (5) -
- Employee
- HR
- Finance
- Manager
- Admin

#Employee_Name#

Trigger Type *
Schedule

When To Send *
Start of the day - Everyday -

Report/Alert For The Period * Next Month

Repeat after every days

Type Of Alert *
Upcoming Birthdays

Configure Email recipients

To *

All selected (5) -

Custom Cc Emails

abcd@gmail.com

Select Fields *
#Employee_Name#

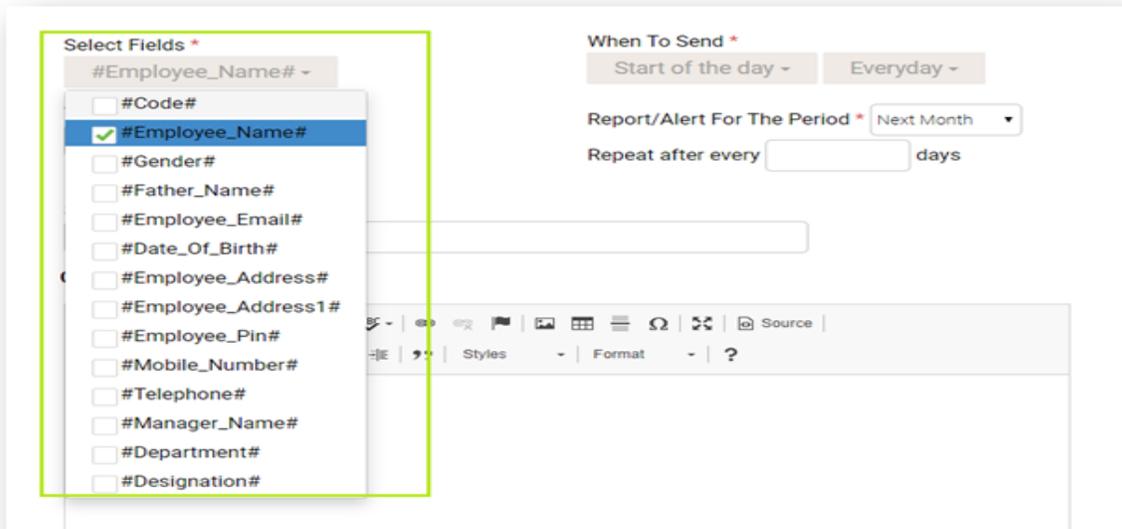
Trigger Type *
Schedule

When To Send *
Start of the day - Everyday -

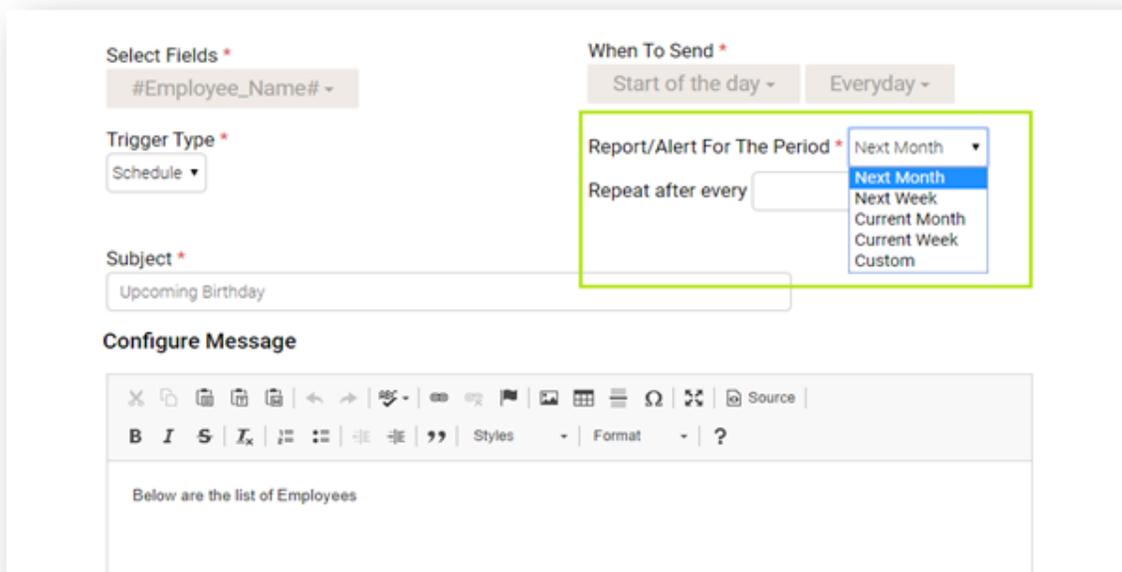
Report/Alert For The Period * Next Month

Repeat after every days

Select the column header name; based on what column names are selected the Report will reflect for those records



Select Report/Alert for the period as next month/next week/current month/current week/custom. If the user selects next week or month, then the list of Employees whose Birthday / Work Anniversary date comes in the next week or month will be triggered. Select “Repeat after every” field to send a reminder after how many days; if the User selects 2 days in the field, the reminder Report will be sent once in 2 days till the mail gets triggered.



“Save” the Report.

