

Create Automatic Alerts

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V3.2

Cora OpsManager provides you a facility to receive an automatic alert for cases of a particular Configuration set, on fulfilment of some conditions. These automatic alerts are configured only by Power users. On fulfilment of the condition, an automatic alert in form of notification is sent to the recipients.

To create automatic alerts:

1. Go to **Flowtime > Ops Manager > Ops Manager Admin > Automatic Alerts.**
2. Click **Add New Record.**
3. On the Automatic Alerts pop-up window, select the following:
 - o Category: Case category for which the automatic alert is to be created.
 - o Type: Case type for which the automatic alert is to be created.
 - o Sub Type: Case sub type for which the automatic alert is to be created.

NOTE

Selecting Category, Type and Sub Type as All, All, and All respectively sets automatic alert for all the cases.

- o Alert Condition: The alert condition to be set for the automatic alert.
 - Time before target date is: The time in business hours from the target date when the alert for the case will be sent. The Time field appears on selecting this option.
 - Case status has been active for: The case status for which alert will be sent when a case has been in this status for the set time in business hours. The Status and Time fields appear on selecting this option.

NOTE

The upper limit for Time is 72 business hours.

- o Recipients: The recipients of the automatic alert.

The screenshot shows the 'Automatic Alerts' configuration window. It includes the following fields and options:

- Category ***: Dropdown menu with 'Loans' selected.
- Type ***: Dropdown menu with 'Business Loan' selected.
- Sub Type ***: Dropdown menu with 'Loan against property' selected.
- Alert Condition ***: Dropdown menu with 'Time before target date is' selected.
- Time ***: Input field with 'Business Hours' text.
- Recipients ***: A list of checkboxes:
 - Case Assignee
 - Team Leader
 - Direct Hot Operations Manager
 - All Hot Operations Manager
- Add**: A blue button at the bottom right.

The recipient can be the case assignee or users of a specific role like a team leader, or direct hot operations manager, or hot operations managers. The direct hot operations manager is the hot operations manager of the team the assignee belongs to, however the hot operations managers are all the other hot operations managers.

4. Click **Add**.

The alert reminders are sent as notifications to the recipients per set time.

V3.1

Cora OpsManager provides you a facility to receive an automatic alert for cases of a particular config set, on fulfilment of some condition. These automatic alerts are configured only by the Power users. On fulfilment of the condition, an automatic alert in form of notification is sent to the recipients.

To create automatic alerts:

1. Go to **Flowtime > Ops Manager > Ops Manager Admin > Automatic Alerts**.
2. Click **Add New Record** to add an automatic alert.
3. On the Automatic Alerts pop-up window, select the following:
 - o Category: Case category for which the automatic alert is to be created.
 - o Type: Case type for which the automatic alert is to be created.
 - o Sub Type: Case sub type for which the automatic alert is to be created.

NOTE

Selecting Category, Type and Sub Type as All, All, and All respectively sets automatic alert for all the cases.

- o Alert Condition: The alert condition to be set for the automatic alert.
 - Time before target date is: The time in business hours from the target date when the alert for the case will be sent.
 - Case status has been active for: The case status for which alert will be sent when a case has been in this status for the set time in business hours.
 - When case status changes: The case status for which alert will be sent when a case status changes to this.
- o Recipients: The recipients of the automatic alert.

The screenshot shows the 'Automatic Alerts' configuration window. It includes dropdown menus for 'Category *' (Loans), 'Type *' (Business Loan), and 'Sub Type *' (Loan against property). There are also dropdowns for 'Alert Condition *' (Time before target date is) and 'Time *' (Business Hours). A 'Recipients *' section contains four checkboxes: Case Assignee, Team Leader, Direct Hot Operations Manager, and All Hot Operations Manager. An 'Add' button is located at the bottom right.

The recipient can be the case assignee or users of a specific role, a team leader, or direct hot operations manager, or hot operations managers. The direct hot operations manager is the hot operations manager of the team the assignee belongs to, however the hot operations managers are all the other hot operations managers.

4. Click **Add**.

The alert reminders are sent as notifications to the recipients per set time.