

Relocation Specialist Standard Business Rules Worksheet

The list below contains the rules included with the Standard Business Rules option. Customer's optional choices are listed below. (The default value is displayed within the parenthesis.)

Run AutoPilot Automatically

For those users where 'Run AutoPilot' is marked TRUE in the Users table, check to see if there are any AutoPilot items to be sent, and send them automatically. Then, email the user to inform them of how many AutoPilots were sent.

Choices:

Check every: _____ minutes (30 minutes is default)
Between hours: _____ (7:00AM-7:00PM Central time is default)
Days of week: _____ (Sunday-Saturday is default)

Import Table Contains Records

The Import table is checked and if there is one or more records an alert is sent.

Choices:

Check every: _____ minutes (30 minutes is default)
Between hours: _____ (7:00AM-7:00PM Central time is default)
Days of week: _____ (Sunday-Saturday is default)
Email value, if used is: _____
Text value, if used is: _____

Send Alert if Agent Doesn't Accept an Assignment

Send an alert if the agent receives the AutoAssign form and answer 'NO -I do not accept'

Choices:

Check every: _____ minutes (30 minutes is default)
Between hours: _____ (7:00AM-7:00PM Central time is default)
Days of week: _____ (Sunday-Saturday is default)
Email value, if used is: _____
Text value, if used is: _____

Send Alert if Agent Doesn't Respond Within Allotted Time

Send an alert if the 'AutoAssign' form is sent to an agent using AutoPilot with 'Response Required = YES' and the agent hasn't accepted within a certain amount of time.

Choices:

Check every: _____ minutes (30 minutes is default)
Between hours: _____ (7:00AM-7:00PM Central time is default)
Days of week: _____ (Sunday-Saturday is default)
Amount of time before sending alert: _____ (24 hours is default)
Email value, if used is: _____
Text value, if used is: _____

Send Alert if AutoPilot is Missing the Email Address

AutoPilot items without email addresses cannot be sent. Send alert if no email address.

Choices:

Check every: _____ minutes (30 minutes is default)
Between hours: _____ (7:00AM-7:00PM Central time is default)
Days of week: _____ (Sunday-Saturday is default)
Email value, if used is: _____
Text value, if used is: _____

Send Alert if Urgent Response

Send alert if any Response coming back from agent or contact is marked URGENT.

Choices:

Check every: _____ minutes (30 minutes is default)
Between hours: _____ (7:00AM-7:00PM Central time is default)
Days of week: _____ (Sunday-Saturday is default)
Email value, if used is: _____
Text value, if used is: _____

Send Alert if There Are ACTIVE Referrals Where Last Update Date > 14 days

Send alert if there are Referrals with Referral Status = 'Active' and the Last Update Date is greater than 14 days

Choices:

Check every: _____ minutes/hours/days (1 day is default)
Between hours: _____ (7:00AM-7:00PM Central time is default)
Days of week: _____ (Sunday-Saturday is default)
Email value, if used is: _____
Text value, if used is: _____

Send Alert if MgrConsultant Name is missing and Status = Active

Send alert if any 'Active' referral is missing the MgrConsultant.

Choices:

Check every: _____ minutes/hours/days (1/day is default)
Between hours: _____ (7:00AM-7:00PM Central time is default)
Days of week: _____ (Sunday-Saturday is default)
Email value, if used is: _____
Text value, if used is: _____

Send Link to Customized Advanced Reports

Send emailed links for up to 3 Advanced reports where the selection criteria is customized to your needs. Select the 3 reports and let us know what modifications you need to the fields used to filter the report. We will modify the Advanced report so that only the date range fields are used to update and display the results you want. Contact your ReloSpec Team member for details.

Choices for Report 1:

Report Name _____
Check every: _____ days (once per month is default)
Day of week: _____ (run on first day of month is default)
Email value, if used is: _____
Text value, if used is: _____

Choices for Report 2:

Report Name _____
Check every: _____ days (once per month is default)
Day of week: _____ (run on first day of month is default)
Email value, if used is: _____
Text value, if used is: _____

Choices for Report 3:

Report Name _____
Check every: _____ days (once per month default)
Day of week: _____ (run on first day of month is default)
Email value, if used is: _____
Text value, if used is: _____