

Escalation Rules

Settings – Escalation Rules allows the user to set up Rules, Triggers and actions for Jobs that are overdue for nearly due.

Escalation Rules						
				Actions		
Escalation Name	Trigger Name	How Many Days	How Many Hours	Send Email	Assign Job	Create Note
One day after Due Date	Expected Complete Date Overdue	1	0	false	false	true

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Help

Click ‘Create Escalation Rule’ to create a new rule. As per screenshot above we have created a rule named ‘One day after Due Date’, the trigger is 1 day after ‘Expected Complete Date Overdue’ and the action will be that a Job Note will be created.

Step 1 – Rule Information

Rule Information	
Rule Name	One day after Due Date
Trigger Event	Expected Complete Date Overdue
How Many Days	1
How Many Hours	0

Help

Step 2 – Filters

Filters

Reactive / Planned

Reactive Only

Job Type

HVAC

Contract

Site

Delta Campus

Job Priority

[? Help](#)

Step 3 – The action

Send Email

Send Email

Yes No

[? Help](#)

Assign Job

Assign Job

Yes No

[? Help](#)

Create Note

Create Job Note

Yes No

Note

This Job Is One day overdue

[? Help](#)

Job Alerts

Create Job Alert	<input checked="" type="radio"/> Yes <input type="radio"/> No
Alert date/time	2 (hours after alert creation)
Alert Type	Review
Action Required	Please see that all is ok.
Assign To Everyone	No
Assign To User	Abilash test
Assign To Team	Another
Assign To Resource	No
Due Date	25 (hours after alert date)
Send Overdue Notification to User	Darren McGill
Send Overdue Notification to Team	Electricians
Send Overdue Notification to Resource	No