

Flexar

putting flex work to work

Automated Emails



Automated Emails

Flexar creates emails to:

- inform people involved in the proposal process,
- keep the process moving forward in a timely or expedited manner,
- make clear the next step for the next person in the proposal process.

Automated Emails & Status

Emails are sent on the following Status Changes of Arrangements (Proposals):


- **Submit**
- **Modify**
- **Approved**
- **Declined**
- **Re-Submit**
- **Active**
- **Ended**
- **Completed**
- **Terminated**
- **Withdrawn**

Automated Emails with Action

Emails with ***embedded Action*** are sent on Status Changes of Proposals/Arrangements:

- **Submit**
- **Modify**
- **Re-Submit**
- **Approved** (with more than 1 Level of Review)

Email on Submit



Tue 8/26/2014 5:20 PM
FM_Test1@flexwa.com
Franklin_Ben_20140826_326

Date and time of email.

Sender email address.

Arrangement name in the Subject line.

To: tom.jefferson@pipersoft.net
Cc: ben.franklin@pipersoft.net

Ben's manager – Tom - who needs to process Ben's proposal.
Ben is cc'd so he knows Tom has been informed of the proposal submission.

This Proposal has been SUBMITTED for consideration and decision regarding outcome. The receiving Manager should process the proposal at your earliest convenience by clicking the link below or from the Manager Menu.

https://www.flexwa.com/FM_Test1/ProcessRequest.aspx?FWAE_ProcessRequest_GUID=DEB499C2-7F26-4104-B1A1-EB9DDF3A6088

The link to the review process and the subject proposal .

- automatically created by **Flexar** at time of Submit.
- “Subject:” contains the Arrangement Name (the applicant last name, first name, date arrangement was created, arrangement ID).
- “From:” is the Flexar mail sender for the client company.
- “To:” is the person to perform the next action - process proposal.
- “Cc:” are the parties notified of the submitted proposal (no action expected).
- The text message is client dependent for “Submit” & part of the configuration.
- A link to “Process Proposal” with the identified Arrangement.

Email on Modify



Fri 8/8/2014 1:30 PM

FM_Test1@flexwa.com

Anderson_Thomas_20140530_319

To tom.anderson@pipersoft.net

Cc dan.mitchel@pipersoft.net

This Proposal has been processed by Management and you are being requested to make modifications per the comments provided regarding your proposal. Please make the corresponding modifications and RE-SUBMIT your proposal. You may access your proposal by clicking the link below or through the Employee Menu.

https://www.flexwa.com/FM_Test1/ProcessRequest.aspx?FWAE_ProcessRequest_GUID=7D902226-C199-488C-8B61-2AF8A3B01DE4

- Clicking on the embedded link takes the user through “credential & role validation” to the “Profile” tab in “Edit Existing Proposal” operation with the subject Arrangement open for Modification.
- Anyone other than the applicant will be automatically rejected as an invalid user for the action.
- The text of the email can be changed by the client to best meet their needs, as well as additions to the CC recipients.

Email on Approved & Declined



Thu 8/7/2014 3:00 PM

FM_Test1@flexwa.com

Stark_Hunter_20140807_321

To tom.jefferson@pipersoft.net

Cc hunter.stark@pipersoft.net

This Proposal has been APPROVED by management of previous levels. The receiving Manager should process the proposal at your earliest convenience by clicking the link below or from the Manager menu.

https://www.flexwa.com/FM_Test1/ProcessRequest.aspx?FWAE_ProcessRequest_GUID=E34030A9-6073-4C26-ACB2-C38B0032D1B8



Fri 8/8/2014 1:30 PM

FM_Test1@flexwa.com




Smith_Bob_20140519_318

To bob.smith@pipersoft.net

Cc dan.mitchel@pipersoft.net

This proposal has been DECLINED by your Manager - no additional action is required at this time.

Email on Withdrawn & Terminated

 Reply  Reply All  Forward



Fri 8/8/2014 2:40 PM



FM_Test1@flexwa.com

Valentino_Bill_20140113_294

To paul.rasmis@pipersoft.net

Cc bill.valentino@pipersoft.net

This proposal has been WITHDRAWN by the Applicant - no additional action is required at this time.

 Reply  Reply All  Forward



Fri 8/8/2014 2:30 PM

FM_Test1@flexwa.com

Lane_Lois_20140506_317

To lois.lane@pipersoft.net

Cc dan.mitchel@pipersoft.net

This Arrangement has been TERMINATED by the Manager - no additional action is required at this time.

Email on Ended & Completed

 Reply  Reply All  Forward



Fri 8/8/2014 12:00 PM

FM_Test1@flexwa.com

Thomas_Isaac_20140113_290

To isaac.thomas@pipersoft.net

Cc tom.anderson@pipersoft.net



This Arrangement has ENDED by way of replacement or by selection - no additional action is required at this time. If you wish to continue under a Flex Work program you will need to re-apply.

 Reply  Reply All  Forward



Fri 8/8/2014 2:40 PM

FM_Test1@flexwa.com



Smith_Bob_20140313_307

To bob.smith@pipersoft.net

Cc dan.mitchel@pipersoft.net

This Arrangement has been COMPLETED - no additional action is required at this time.

Email on Active & Ended

 Reply  Reply All  Forward



Fri 8/8/2014 2:40 PM

FM_Test1@flexwa.com

Stark_Hunter_20140807_321

To hunter.stark@pipersoft.net

Cc dan.mitchel@pipersoft.net

This Proposal has been made ACTIVE, based on final approval. It is now a working Arrangement. You and your manager should be operating under the terms of the Arrangement.

 Reply  Reply All  Forward



Fri 8/8/2014 12:00 PM

FM_Test1@flexwa.com

Thomas_Isaac_20140113_290

To isaac.thomas@pipersoft.net

Cc tom.anderson@pipersoft.net

This Arrangement has ENDED by way of replacement or by selection - no additional action is required at this time. If you wish to continue under a Flex Work program you will need to re-apply.

Email on Specific Flex Work Type



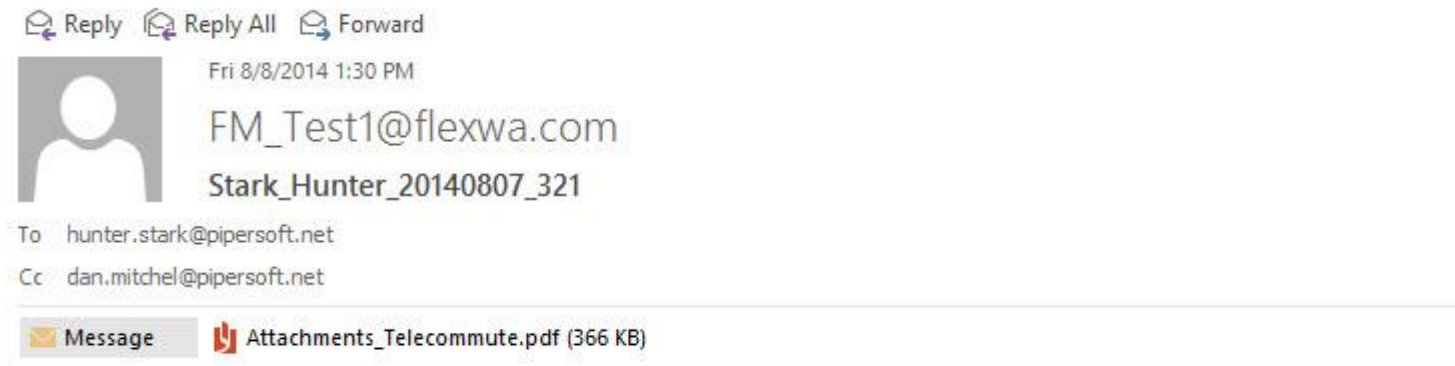
This proposal for Telecommuting has received final approval. The applicant will contact you shortly to arrange needed resources.

This email message is sent on final approval status and for Telecommuting flex work types only. It is sent to a specific recipient (not by role). This particular email message is used to notify the person responsible for provisioning telecommuters in their company with the equipment and software needed to work remote.

Messages can be defined for each status AND flex work type.

Email on Proposal Answer

& illustrates use of Attachment



Your proposal for Telecommuting has received final approval - congratulations! You (the applicant) need to complete the enclosed form and submit it to IT-Employee Workplace Support so they can properly provision your remote work site.

- Messages can be defined with file Attachments (one or more). This particular message is sent when a proposal question has a specific answer. 'Do you need equipment?' = YES.
- Messages can be identified for each status + each flex work type + each proposal question answer! Messaging not only expedites proposals it also can link flex work initiatives to other departments.
- Flexar Messaging is powerful, versatile and very effective.

Summary of Automated Email

- ❑ Maintains timely Proposal progress through the organization.
- ❑ Clarifies action required of each participant in the proposal process.
- ❑ Fully automated composition and send schedule – no user action required.
- ❑ Composition and recipients defined by templates for flexibility, customization & reliability.
- ❑ Embedded links provide rapid, secure and direct access to operations.
- ❑ Minimizes human and calendar time - maximizes efficiency.
- ❑ Combinations of conditions (status, flex work type and question responses) make messaging versatile, powerful & very effective.

NEXT STEPS

Your company could be enjoying the benefits of **Flexar** within 3 weeks for less than you expect.

There is nothing to buy, no hardware or specialized software to acquire. Users need only a browser (on their computer, notepad or phone). Pipersoft provides everything else for client use.

If you have any questions or would like to schedule a Flexar demonstration, please call 240-602-1127 and ask for a Flexar specialist or email support@pipersoft.net with your request.

If you would like a cost quote and proposal, please call the above number and ask for a Flexar Sales specialist or email your request.