SYSSERO®

Syssero® Solution Packet

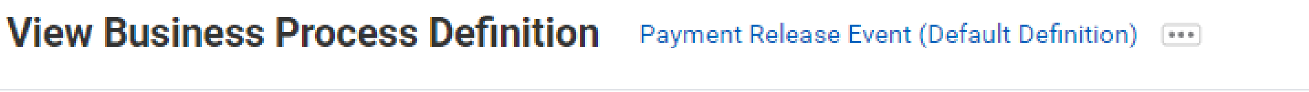
Expense Report Paid (Notification) | Version# 001

Services Partner workday.

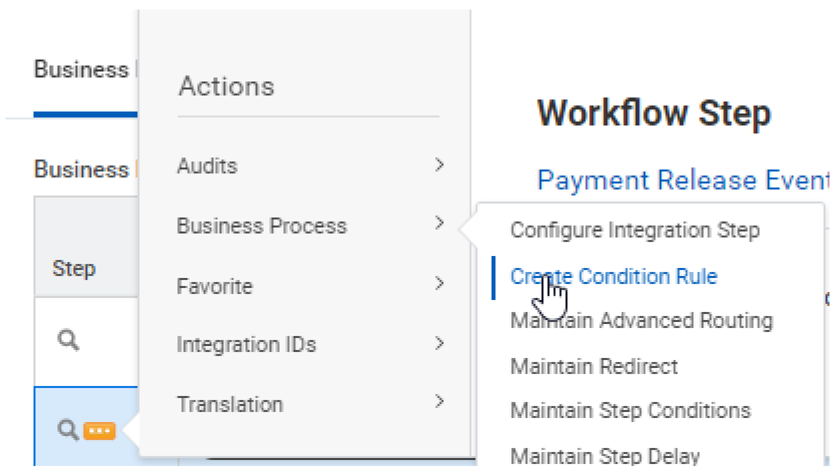
Solution Overview

Creating a notification to employees to let them know when their expense report has completed processing for payment.

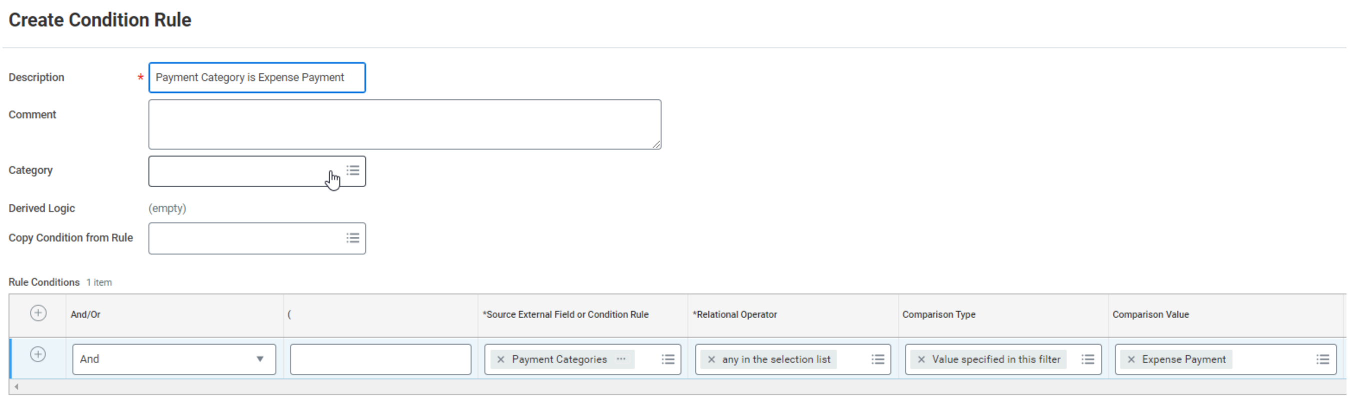
1. Go to the 'Payment Release Event' Business Process.



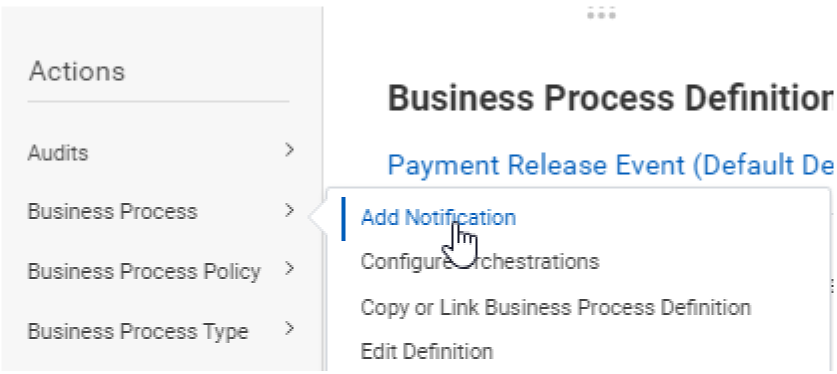
2. Before creating the notification, you will need to create a condition rule that identifies expense payments. Go to the related actions off any step on the business process and go to Business Process>Create Condition Rule.



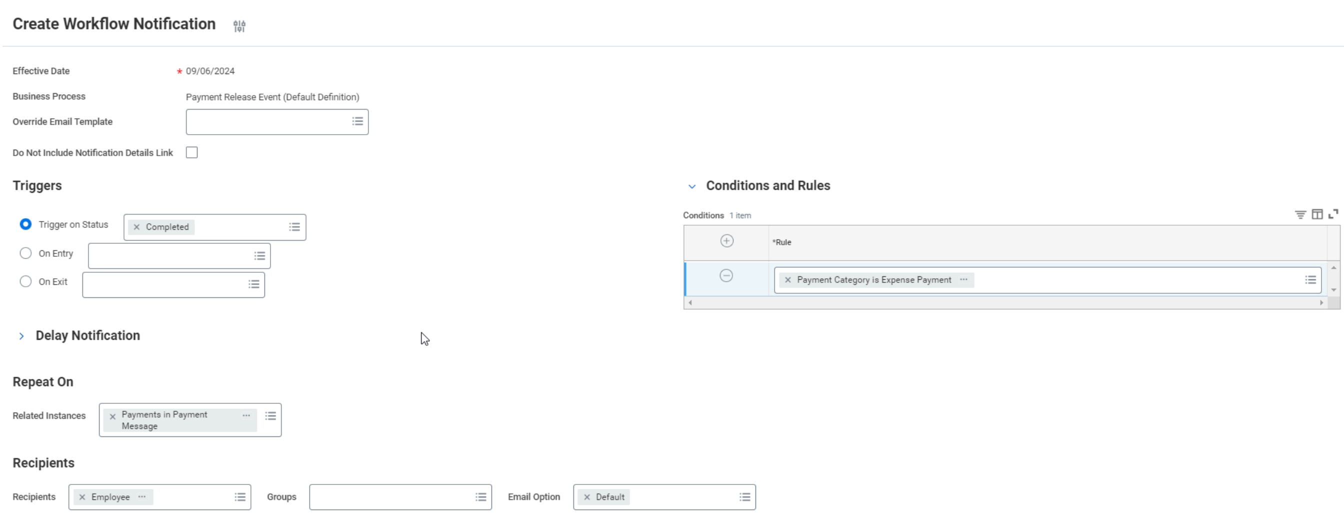
3. Create a condition rule that returns true if the Payment Category is Expense Payment.



4. Once this is created, go back to the related actions off the Business Process itself and go to Business Process>Add Notification.



5. In the header of the ‘Create Workflow Notification’ window, fill it out accordingly.
    a. For trigger on status, select Completed. This will cause the notification to kick off once all steps for payment release have been completed.
    b. Under Repeat On > Related Instances select ‘Payments in Payment Message.” This step is important as other fields needed later will not show unless this is selected here.
    c. Under recipients, select Employee. *Note that if this field does not show as an option, you need to revisit the related instance step above.
    d. Lastly in the header, on the right hand side, select your ‘Payment Category is Expense Payment’ condition rule. This will limit the notification to only go out in the instance of it being an expense report being paid.



6. Lastly, you can customize the message that goes out to the employee with the notification.
   In the Subject box under Message Content, you can reference a number of External Fields, including the Expense Reports being paid. Additionally you can add in free text for the subject as well. If you wish to add in a Body to the message you can do as well either referencing fields or adding in free text. Once all is complete, click OK and your notification is set.