

# OnHold Alerts and Reminders

MobileERP.in

April 2024

MobileWXM	MobileCXM	MobileSXM	MobileEXM	MobileFXM	MobileMXM
Workplace Experience Management	Customer Experience Management	Supplychain Experience Management	Employee Experience Management	Finance Experience Management	Management Experience Management
DBM: Dashboard Management	CRM: Customer Relation Mgmt	SCM: Supply Chain Management	HCM: Human Capital Management	ACC: GL Accounts Management	IDE: Int Codeless Development Env.
DBS: Daily Briefing System	DMM: Digital Marketing Mgmt	PPP: Plan, Procure & Purchase	TLM: Travel & Leave Management	FRM: Finance Resource Management	EIM: ERP Implementation Mmgt
GTD: Getting Things Done	TMM: Tender Marketing Mgmt	MFG: Manufacturing & Shopfloor	TOM: Time Office Management	CSM: Costing & Spend Management	ULM: User Lifecycle Management
ETM: Enterprise Task Management	OMS: Offer Management System	EPC: Engg., Procure, Construction	PAY: Staff Payroll Management	GST: Goods and Service Tax	UXM: User Experience Management
DRS: Daily Reporting System	SDM: Sales & Distribution Mgmt	IMS: Inventory Management Systems	WAG: Labour Wage Management	EXM: Export Import Management	EPM: Enterprise Process Management
ECM: EntL Collaboration Mgmt	SMS: Service Management System	LMS: Logistics Management Systems	LMS: Learning Management Sys	SEM: Strategic Enterprise Mgmt	EBI: Enterprise Biz Intelligence
ESP: Ent. Sharepoint Portal	PMS: Project Management System	EAM: Enterprise Asset Management	PGM: Performance & Goal Mgmt	CGM: Corporate Governance Mgmt	ECM: Enterprise Content Mgmt
DSS: Department Self Service	COM: eCommerce Management System	MMS: Maintenance Mgmt Systems	PAM: Personal & Administration	GRC: Governance Risk & Control	ITM: IT Services Management
TSS: Travel/Claim Self Service	CSS: Customer Support Systemm	QMS: Quality Management System	LEG: Legal Management System	AAM: Account Audit Management	ITA: IT Asset Management
ESS: Employee Self Service	PLM: Product Lifecycle Mmgt	SCS: Seller Center Portal	FOR: Front Office Reception	SMS: Security Management System	ISO: ISO Quality Management
GTD, ROWE, DMS, PDCA, 8020	COPC, ISO, CXO, CANVAS	APICS, MRP, LEAN, PMI, 5S	PCMM, HRBS, KPI, KRA, ISO	ABC, COPA, GAAP, RISK, RATIOS	CMMi, 6S, BPR, AIOP, ITSM, DEVOPS

### My Daily Briefing System

Email Inbox

Meetings/MOMs

Tasks/Activities

Tickets/Holds

Alerts/Reminders

Chat Messages

10/04/2024 13:20:43

## My Daily Breifing Pending Work due as on 10/04/2024

Emails	Meetings	Tasks	Tickets	Holds	Reminders	Messages	Work
To Answer	To Attend	To Do	To Close	To UnHold	To Act	To Read	To Initiate
<a href="#">All Emails</a>	<a href="#">All Meetings</a>	<a href="#">All Tasks</a>	<a href="#">All Tickets</a>	<a href="#">All Holds</a>	<a href="#">All Alerts</a>	<a href="#">All Chats</a>	<a href="#">All Work</a>
End: 0	End: 0	2754.SCM Purchase	End: 0	55.PL/632 HRRL: Rev. 0 Greeshma Mishrad	PROPR. Property Maintenance Due on 5th day	End: 0	<a href="#">My Leave</a> <a href="#">My Attendance</a> <a href="#">My Timesheet</a> My SelfService
		UNAPPROVED PO RECEIVED AGAINST MR- Edit/Approve PORDER-		63.CTC REPORT CHECKING ASHISH G. KANTAWALAd	TDS. TDS on Salary Due on 7th day		ERP <a href="#">Add/Approve</a> <a href="#">Discuss</a>

# What is HOLD and REMINDER SYSTEMS

- **HOLD SYSTEM:** This system acts like a solution for war rooms in the company where every employee blame every other employee for work help by others. So whoever work gets suffered due to other person, a hold needs to be created. Person who gets responsibility will Unhold it and gets work done. This system will also get rid of Email system which cannot tell you or force other person to get work done. This will also reduce email, verbal calls and meetings. This is big day to day time saver in companies.
- **REMINDER SYSTEM:** Reminder are set alerts in system based on certain time based events. Reminder is set and updated in Reminder master. Some reminder gets generated dynamically based on ERP Document Transactions.

# Step 1: HOLD by Sender

Whenever an employee work is suffering due to other employee of company a hold is generated. Person on whose name hold is generated has to complete the work and Unhold it.

The screenshot displays the MobileERP interface. The top navigation bar includes the MobileERP logo, user information (637.ASHISH G. KANTAWALA, Computer Department), and the date/time (10/04/2024 13:26:05). Below the navigation bar is a menu of modules (ERP, GTD, CRM, DMM, TMM, OMS, etc.) and a toolbar with various icons for document management and workflow. The main content area shows the '39. ERP Work Area' with buttons for Home, Folder, Camera, and Edit. Below this is a navigation bar with tabs for Uploads, Chatter, Meetings, Emails, Ticket, Hold, Page, Checklist, Drill, Status, Log, Portal, and Share. The 'Hold' tab is active, displaying an 'OnHold Document' form. The form includes a dropdown for 'Person Responsible for this Hold' (set to [ADMIN ]KEYUR J. BHATT), a text field for 'Reason for Hold', and a text area for 'Type why you want to hold this document?'. Below the form is a table titled 'All Active Hold for this document' with columns for #, Hold By, Hold Date, Reason for Hold, Hold Responsible, and Delay.

MobileERP

10/04/2024 13:26:05

637.ASHISH G. KANTAWALA  
Computer Department

FY: 2425 - 09/04/2024

My Dashboard  
My Daily Briefing  
GTD GETTING THINGS DONE  
My Workspace  
Erp  
Design  
Develop  
Testprocess  
Released  
Support  
Process  
My Work Masters

ETM ENTERPRISE TASK MANAGEMENT  
My Tasks  
My Tickets

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ERP GTD CRM DMM TMM OMS SDM SMS PMS CSS PLM SCM PPP MFG EPC IMS LMS EAM MMS QMS HCM TLM TOM PAY

ScoreCard Create Edit Approve Print OnHold Approved Rejected Delegate Calendar Scheduler Timesheet WBS Gantt Resource Material Manpower Machinery B/O MTO MTS MRP ROP KANBAN Today ToDo Kanban Ticket UnHold Lists Process Pipeline Progress Journey

Goals Initiate-Inform People Plan-Ask People Execute-Make Decision Control-Monitor Progress

39. ERP Work Area Home Folder Camera Edit ECM: UnApproved / Approved / Rejected

Uploads Chatter Meetings Emails Ticket Hold Page Checklist Drill Status Log Portal Share

OnHold Documents  
My Hold  
Active Hold  
Hold History

OnHold Document

Person Responsible for this Hold .. [ADMIN ]KEYUR J. BHATT

Reason for Hold:

Type why you want to hold this document?.

OnHold

All Active Hold for this document

#	Hold By	Hold Date	Reason for Hold	Hold Responsible	Delay
1	ASHISH G. KANTAWALA	10/04/2024 13:25:39	KINDLY GIVE ACCESS TO CLOUD SERVER SO THAT I COMPLETE MY WORK	KEYUR J. BHATT	0

# Step 2: UNHOLD by Receiver

Whenever an employee work is suffering due to other employee of company a hold is generated. Person on whose name hold is generated has to complete the work and Unhold it.

The screenshot displays the MobileERP interface. The top navigation bar shows the date and time as 10/04/2024 13:16:17. The left sidebar contains navigation options like 'My Dashboard', 'My Daily Briefing', 'My Workspace', 'Erp', 'Design', 'Develop', 'Testprocess', 'Released', 'Support', 'Process', 'My Work Masters', 'My Tasks', and 'My Tickets'. The main content area is titled 'Hold Summary' and shows a table of holds. Below it, the 'Current Hold due to me..' section displays a table of holds assigned to the user.

### Hold Summary

Hold Due to	No of Holds
ASHISH G. KANTAWALA	1
Greeshma Mishra	1
KEYUR J. BHATT	1

### Current Hold due to me..

ID	Hold By	Hold Date	Reason for Hold	Delays	Action	
55	Greeshma Mishra	14/02/2024 13:21:17	PL/632 HRRL: Rev. 0 Vendor offer of MBR received from Hydranautics is being sent for review and comments.	56	58	<a href="#">Upload</a> <a href="#">UnHold</a>
63	ASHISH G. KANTAWALA	04/04/2024 11:34:27	CTC REPORT CHECKING	6	58	<a href="#">Upload</a> <a href="#">UnHold</a>

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# Types of Reminders

- Tax Compliance Reminder
- Monthly recurring bill payment Reminder
- License Renewal Reminder
- Project EMD Refund Collection Reminder
- Payment Collection Reminder
- AMC Renewal Reminder for Assets
- Employee Appraisal Reminder
- Birthday & Holiday celebration reminder
- Travel Reminder
- Meeting Reminder