Use Cases

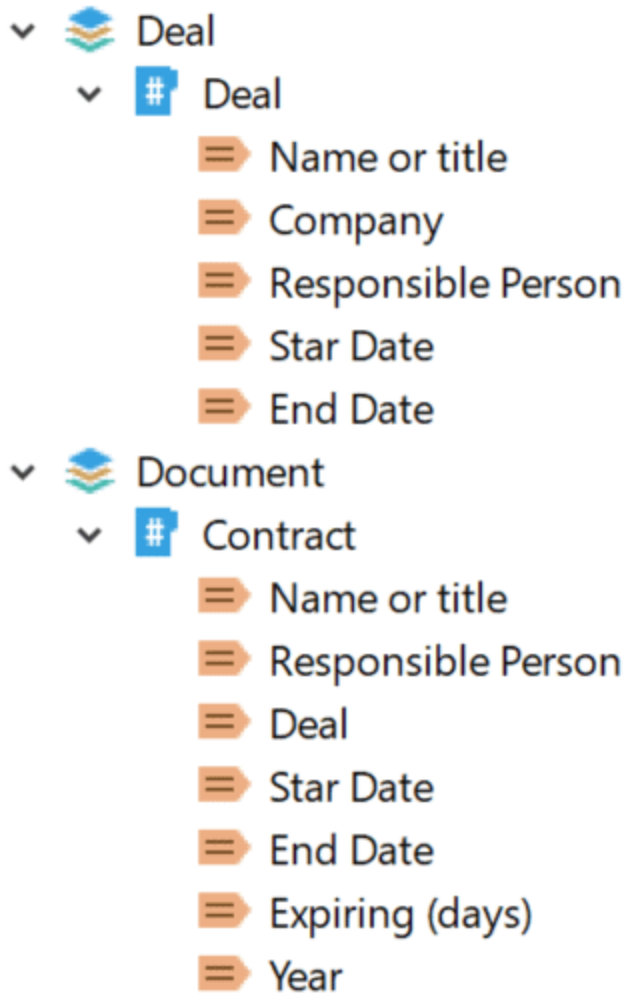
E-mail Integration · https://extensionkit.unitfly.com/documentation/e-mail-integration-use-cases/

Send notification that Deal end date has been changed

Customer is using M-Files to control deals with other partners about business licenses renewals. When contract is near expiring, their legal team is notified three months before, so that can start working on a new condition for next year lease. They are notified by Notification rule and then when they negotiate new terms and sign new contract, Deal is extended. When Deal is extended, their management is notified by Notification with all necessary details.

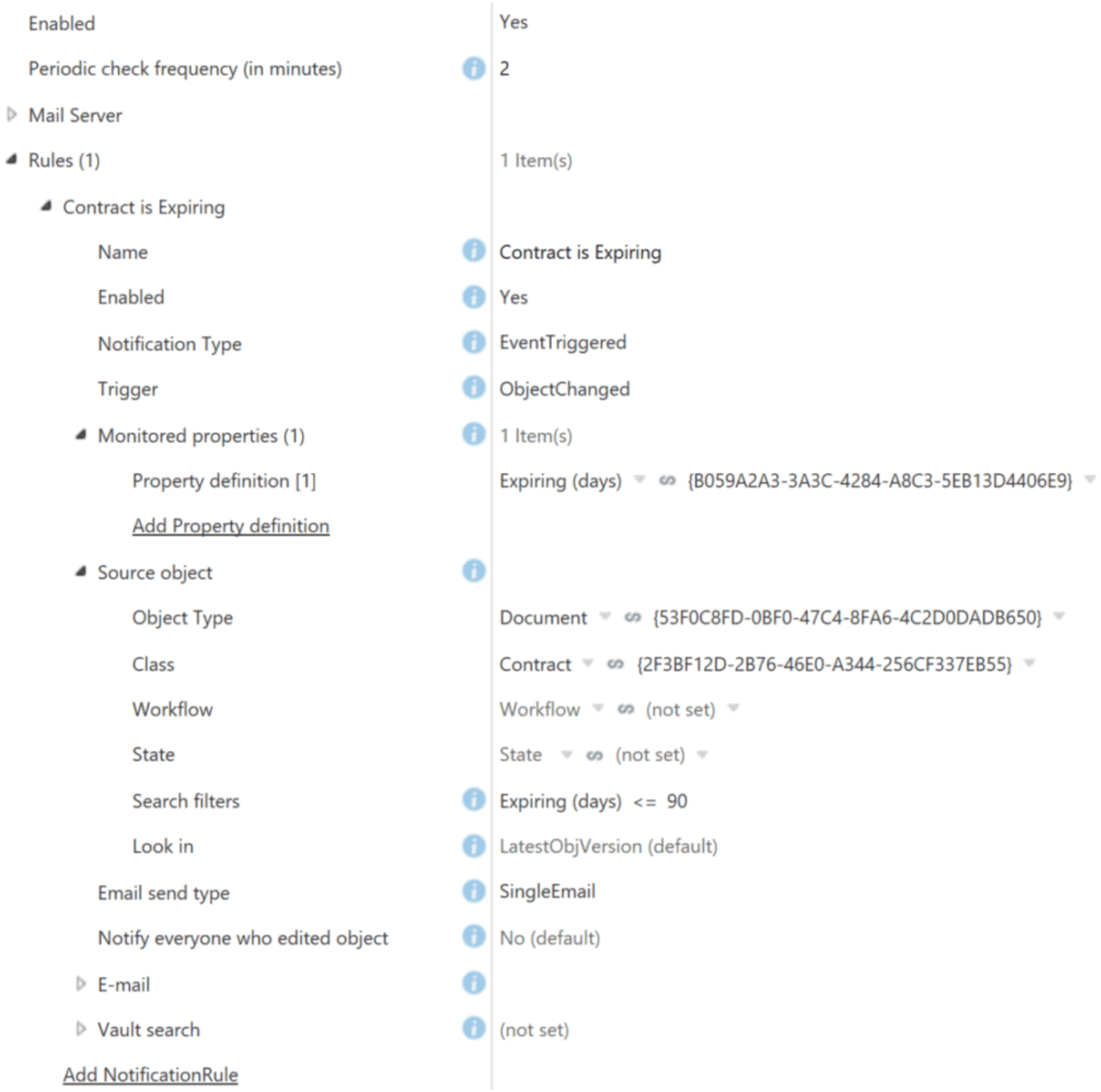
Configuration

Every contract has Responsible person who is notified when contract is expiring, and every Deal have Responsible person who is notified when End Date is changed, Picture 1.



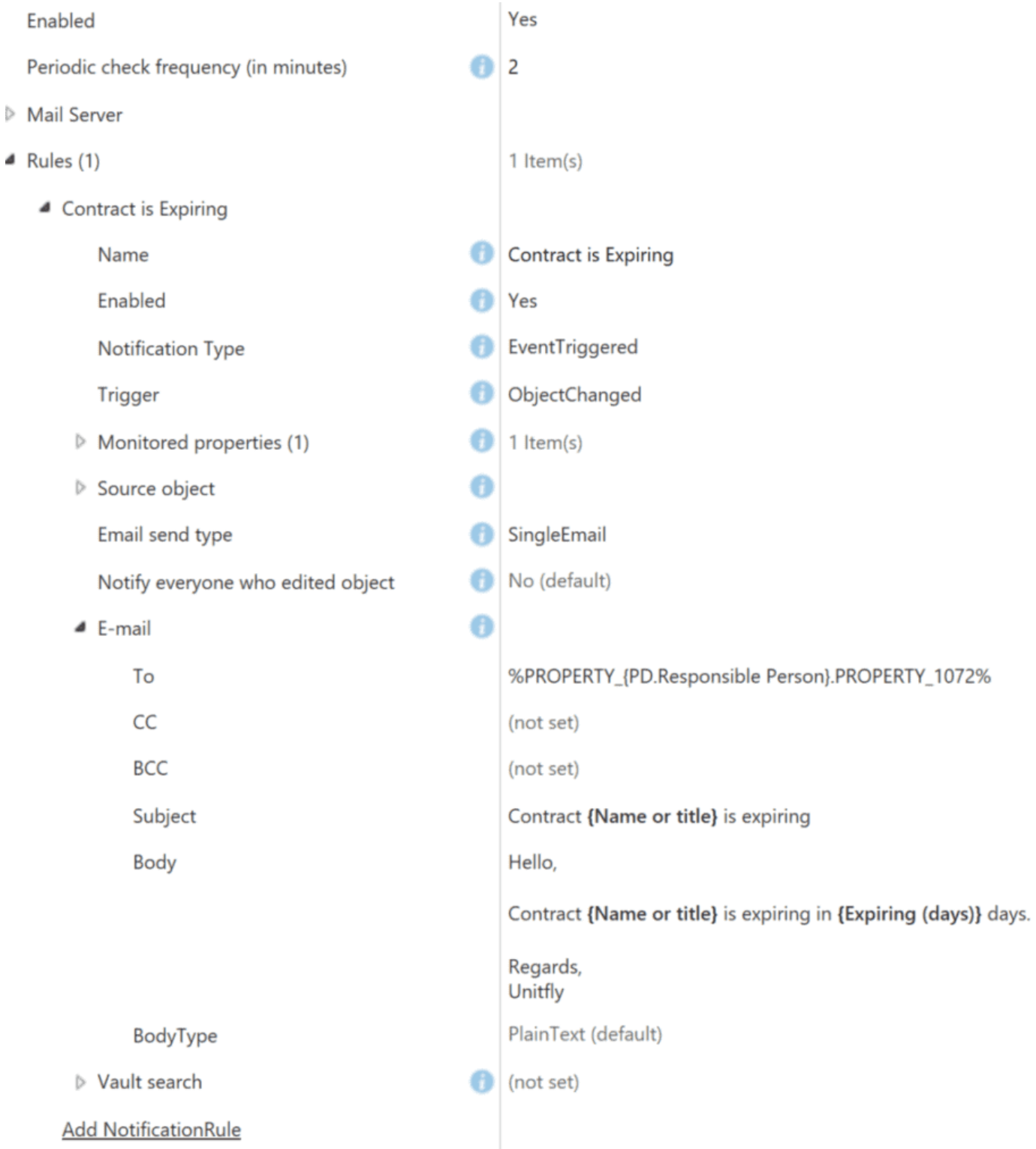
Picture 1. M-Files simplified structure

Customer is monitoring Expiring (days) property, and action is triggered when expiring is equal to 90 days.

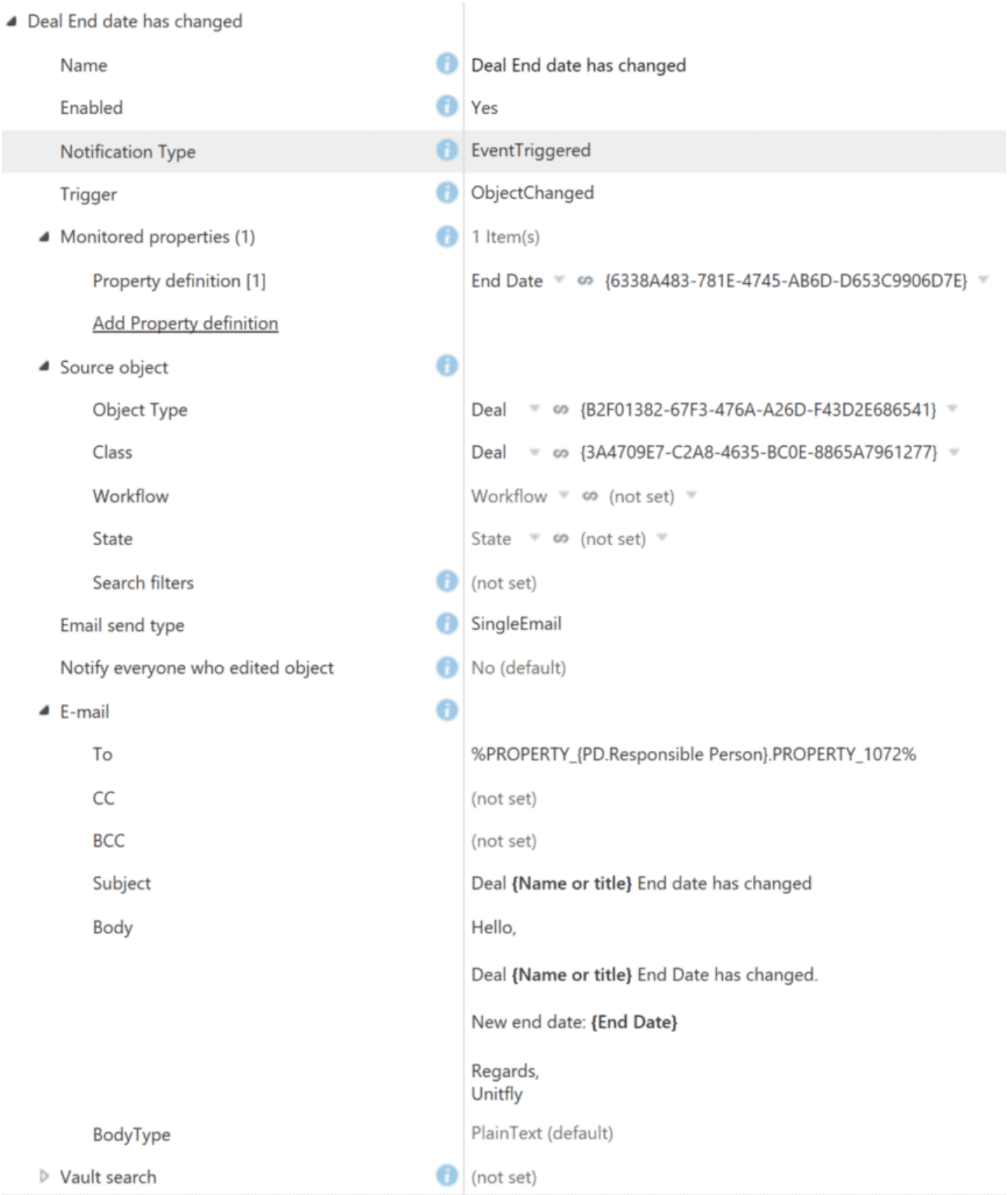


Picture 2. Configuration – Source and trigger

When specific object is changed, rule will be triggered and we will send notification to a responsible person, or Person.Login, where Login is list of M-Files login accounts, Picture 3.



Picture 3. Configuration – E-mail

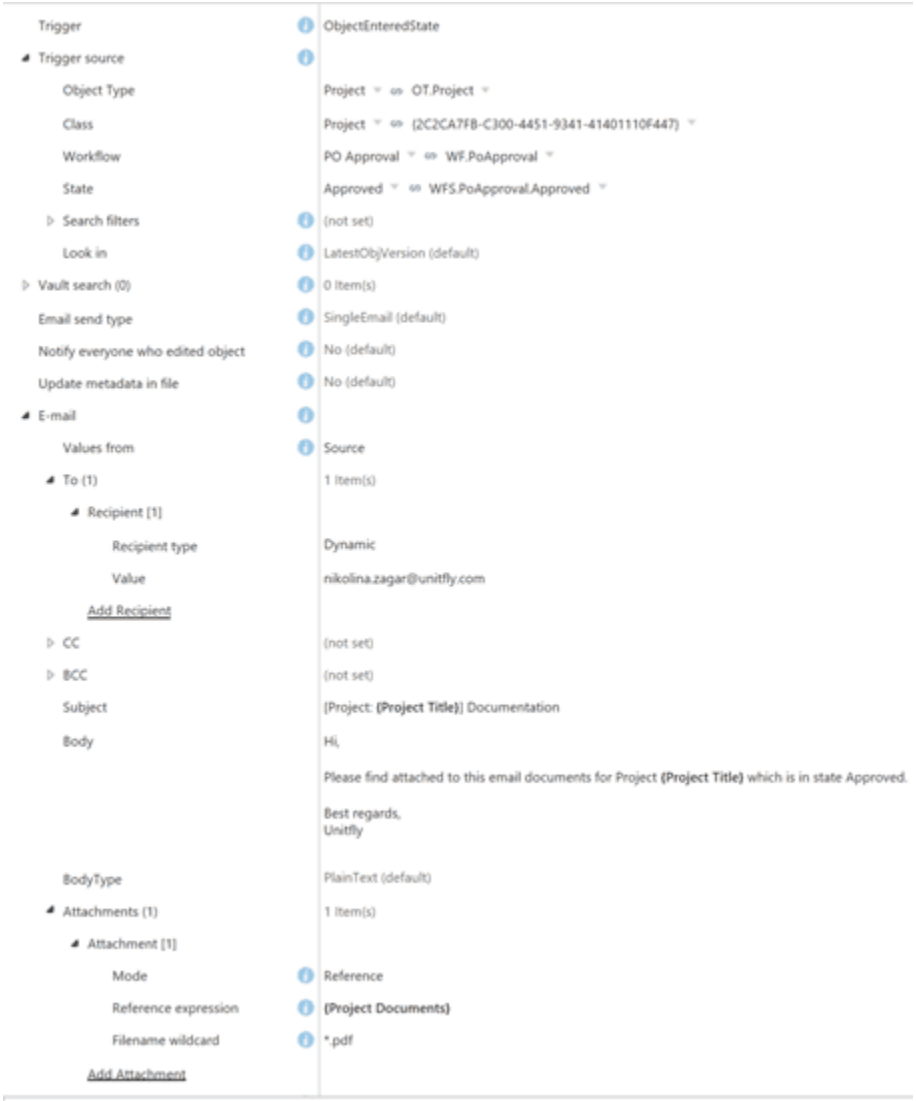


Picture 4. Configuration – Deal End Date has changed

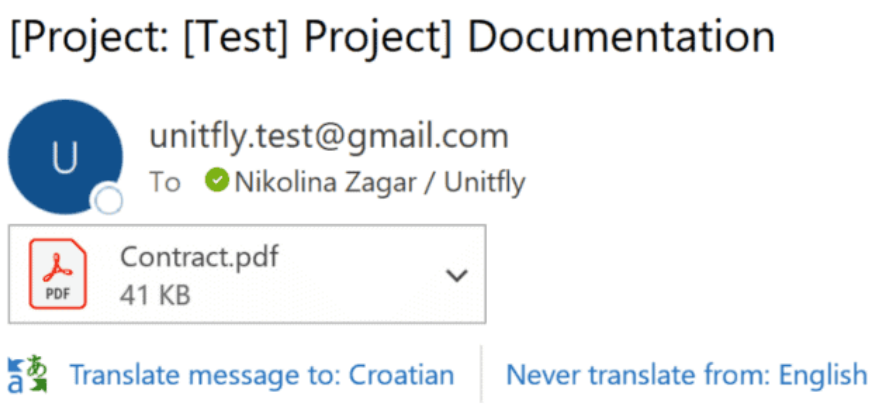
Sending attachment with email

Customer wants to send only PDF document in attachment when Project entered state Approved.

Configuration



Result



Send notification when training schedule has been changed

Customer is using M-Files for a training management. When training schedule is changed, all other participants are notified that schedule has changed.

Send notification when customer is having a birthday

Customer is using M-Files as a CRM. They KAMs are notified when their customer is having a birthday.