

Retirement Report
Have your monthly reports generated and waiting for approval.

Codeless Development to Develop Workflows

Company-wide Announcements:
Happy Holidays message posted to Bulletin Boards, sent to Employee Portals, sent to Mobile Apps. Removed on defined date.

New-hire Approval:
HR gathers resumes, sends the best to the Supervisor and notifies the Vice President - Operations.

Salary Increase Approval:
Automated messages from Manager to Director to Accounting to Employee: Congratulations! Job well done.

Anderson Group / Flows / #652314
Monthly Retirement Report Flow #652314
10:15 a.m. EDT

Event
Timed (Monthly)
This flow runs on a monthly basis, on a specific day and at a specific time.
Day First workday of the month
Time 1:00 a.m.

Action
Create Retirement Report
Detailed report with updated retirement benefits for employees. Generated according to defined templates and delivered to third-party vendors.
Name Retirement-(Month)-(Ye...
Template Olympic 401(k)
Period Month
Show "Has Negatives" Column

Logic
Approval Request
Sends notification to recipients for approval.
Output Approved
Output Rejected
Method Email, with PDF attach...
Recipients Gary Hall, Emily Fro...
Message The latest Retirement...

Action
Upload to FTP
Sends the file to the FTP server.
Server Default
Destination Folder Reports

Name
Monthly Retirement Report

Note
Generates a Retirement Report every first workday of the month. Sends PDF file to appropriate recipients for approval. Uploads approved file to the FTP server for delivery to the third-party provider.

Last Modified By
Andrea Parish on Sept. 30, 2021 at 3:38 p.m. EDT

Recent Runs - View more
Started 9 hours ago, running
1 month ago, ran for 36 minutes
2 months ago, ran for 2 hours

Danger Zone
Delete
Permanently Delete This Flow

Gold Microsoft Partner
ISO 9001:2015
ISO 27001:2013
Microsoft Azure
READY FOR ALL DEVICES

Workflow Automation

By automating your workflows, you can reduce repetitive tasks, increase efficiency and empower your team members to focus on high-value items.

worklio

demo@worklio.com
1 (844) 996-7554
worklio.com