



# Date Alerts

SAR-Hub supports the setting of date alerts to notify the member and/or the admin that certain dates are about to expire.

There are several reporting options for the Agency:

- An on-screen list of alerts and when they are about, or have recently in the past, triggered for a member's date fields(s).
- A log of date alerts that have been sent, with the ability to resend if needed.
- A customizable report for a list of alerts.

For each member, a date alert list is available both via the Member Detail or the member's profile page.

See Appendix A for samples of and how to access the above reports.

## Basics

See the [SAR-Hub Basics](#) document for help on logging in, navigating to the Agency and Member Detail pages, as well as the common editing wizards found on many pages. This and other documents are available on the <https://www.sar-hub.com/about> page.

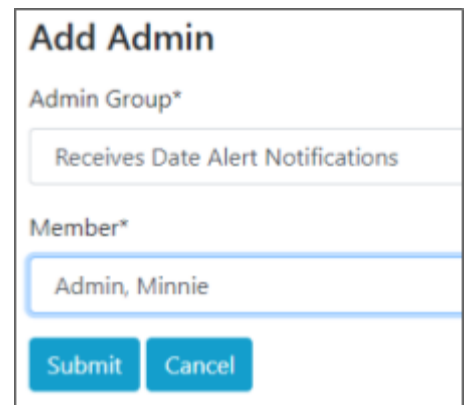
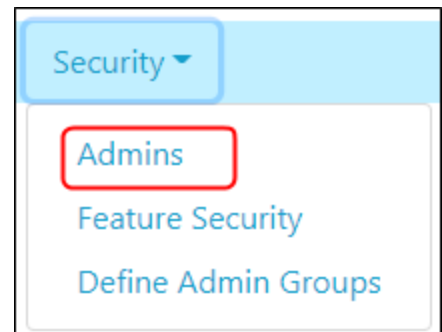
## Settings that apply to date alerts:

### 1. Specify who should received the data alert notification

- From the Agency Detail page "Security" dropdown menu, click "Admins"
- Click "Add"

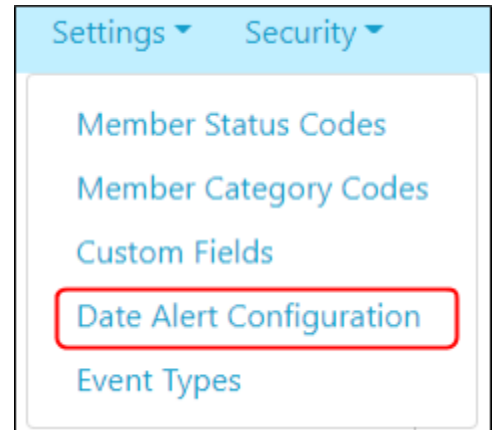


- Select the "Receives Data Alert Notifications" Admin Group
- Select the admin who should receive the date alert notification
- Click Submit
- Repeat for other Admins as needed



### 3. Configure Date Alerts.

From the Agency Detail page “Settings” dropdown menu, click “Date Alert Configuration”



Agency: Sample Agency

### Date Alerts

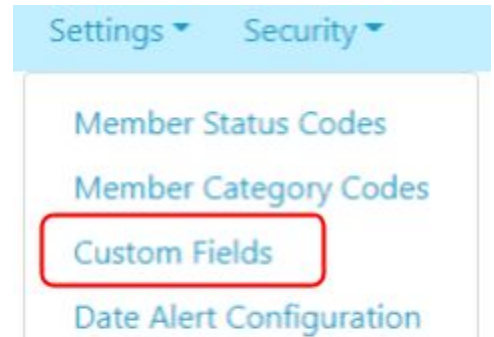
Select All

<a href="#">+ Add</a>	Field No	Name	Days	Email Admin?	Email Member?
<input type="checkbox"/> <a href="#">✎</a> <a href="#">🗑</a>	190	CPR AED Expiration Date	-90	Yes	Yes
<input type="checkbox"/> <a href="#">✎</a> <a href="#">🗑</a>	200	First Aid Expiration Date	-90	Yes	Yes
<input type="checkbox"/> <a href="#">✎</a> <a href="#">🗑</a>	210	Wilderness First Aid Expiration Date	-90	Yes	Yes
<input type="checkbox"/> <a href="#">✎</a> <a href="#">🗑</a>	290	SARTECH Expiration Date	-90	Yes	Yes

You can add, edit or delete date alerts from the Date Alerts Configuration page. Date Alert Fields:

- Days: number of days before (if days is negative) or after a date the alert should be sent
- Email Admin - Whether the admins (as designated in “Global: Receives Data Alert Notifications” Admin Group, see above) should receive an email alert
- Email Member - Whether the member should receive an email alert

You can also add, edit and delete date alerts from the Settings, Custom Fields page.



   	290	SARTECH Expiration Date
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Edit a date field and the associated date alerts will be listed at the bottom of the page.

### Date Alerts

<b>Days*</b> -90 <small>Number of days before (negative number) or after the date to send notification.</small>	<b>Email Admin?*</b> Yes <small>Email the recods admin(s) when this alert occurs?</small>	<b>Email Member?*</b> Yes <small>Email the member when this alert occurs?</small>	<a href="#">Remove</a>
<b>Days*</b> <input type="text"/>	<b>Email Admin?*</b> ----- <small>Email the recods admin(s) when this alert occurs?</small>	<b>Email Member?*</b> ----- <small>Email the member when this alert occurs?</small>	<a href="#">Remove</a>

[Add another](#)

#### 4. Enable date alert emails.

Once the date alerts are set and you are ready to allow the emails to be sent:

- Edit the agency on the Agency Detail page
- Change the “Enable date emails” setting to “Yes”.

#### Agency: Sample Agency

**Description:** This is a sample agency setup for the demonstrat

**Business Contact Phone:** 937-304-1234  
**Contact Email:** [contact@sar-hub.com](mailto:contact@sar-hub.com)  
**Web Site:** <https://www.sar-hub.com>  
**Mailing Address:** 123 Main St, Somewhere, WV  
**General Location:** [3040252070](tel:3040252070), [8207711020](tel:8207711020)  
**Membership Year Start Month:** January  
**ID Card Lookup Enabled:** No  
**Date Alert Emails Enabled:** No  
**Created:** 3 weeks, 2 days ago by Patty Lindsay  
**Updated:** 6 days, 2 hours ago by wimarg1 Laptop

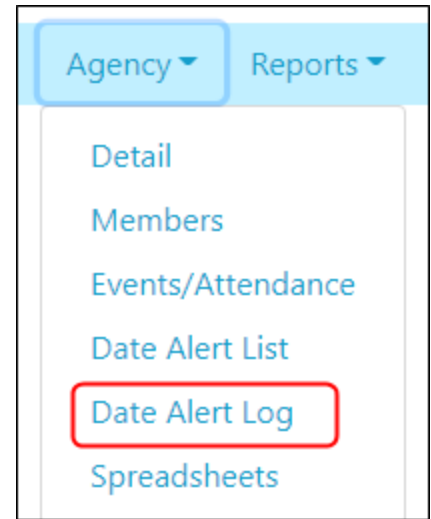
[Edit](#)

5.

<b>Enable date alert emails*</b>	Yes <small>Enable sending of emails for date alerts for this Agency?</small>
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## Date Alert Processing:

A daily process will run and look for date alerts set to trigger on or before the current date that have not yet been logged.. The applicable emails will be sent to the admin and/or the member. All alerts that are processed will be listed on the Date Alert Log page. If the Enable Date Alert Emails setting is set to No, the alerts will be logged but the sending of emails will be suppressed.



### Date Alerts

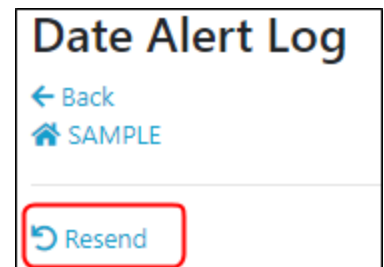
Select All

Search...

Status	Sent	Alert Date	Field	Field Date	Alert Days	First Name	Last Name	Email Sent To	Email Address(es)
<input type="checkbox"/> Resend	2020-12-13 18:53	2020-12-01	SARTECH Expiration Date	2021-03-01	-90	Jane	Doe	Admin	wvmarg1@wvmarg.org
<input type="checkbox"/> Sent	2020-12-13 18:43	2020-12-01	SARTECH Expiration Date	2021-03-01	-90	Jane	Doe	Member	wvmarg2@wvmarg.org
<input type="checkbox"/> Sent	2020-12-13 18:43	2020-10-04	First Aid Expiration Date	2021-01-02	-90	Jane	Doe	Admin	wvmarg1@wvmarg.org

To send an alert that was originally suppressed, or to resend an alert previously sent:

- Select the alert by clicking on the checkbox beside it.
- Click on "Resend" in the left menu bar



## Appendix A - Sample Date Alert Reports

See the document and video on the SAR-Hub report module for help with customizing and running reports, available on the About page:

<https://www.sar-hub.com/about>

An on-screen list of alerts and when they are about, or have recently in the past, triggered for a member's date fields(s).

**Available from:** Agency Detail dropdown menu, "Agency", "Date Alert List"

Agency ▾
Reports ▾

- Detail
- Members
- Events/Attendance
- Date Alert List
- Date Alert Log

### Agency: Sample Agency

#### Date Alerts

Change the date range here.

From  to

Alert Date	Field	First Name	Last Name	Date	Days	Email Admin?	Email Member?
2020-10-04	CPR AED Expiration Date	Jane	Doe	2021-01-02	-90	Yes	Yes
2020-10-04	First Aid Expiration Date	Jane	Doe	2021-01-02	-90	Yes	Yes
2020-12-01	SARTECH Expiration Date	Jane	Doe	2021-03-01	-90	Yes	Yes

A log of date alerts that have been sent, with the ability to resend if needed.

**Available from:** Agency Detail dropdown menu, "Agency", "Date Alert Log"

Agency ▾
Reports ▾

- Detail
- Members
- Events/Attendance
- Date Alert List
- Date Alert Log
- Spreadsheets

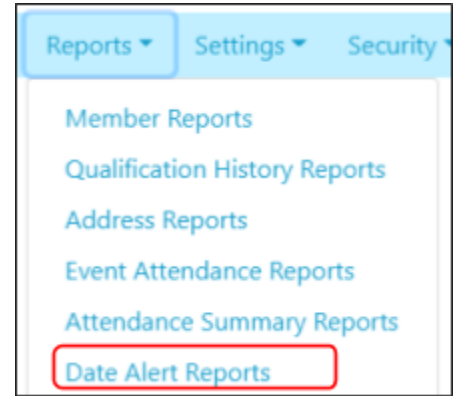
### Date Alerts

Select All

Status	Sent	Alert Date	Field	Field Date	Alert Days	First Name	Last Name	Email Sent To	Email Address(es)
<input type="checkbox"/> Resend	2020-12-13 18:53	2020-12-01	SARTECH Expiration Date	2021-03-01	-90	Jane	Doe	Admin	wvmarg1@wvmarg.org
<input type="checkbox"/> Sent	2020-12-13 18:43	2020-12-01	SARTECH Expiration Date	2021-03-01	-90	Jane	Doe	Member	wvmarg2@wvmarg.org
<input type="checkbox"/> Sent	2020-12-13 18:43	2020-10-04	First Aid Expiration Date	2021-01-02	-90	Jane	Doe	Admin	wvmarg1@wvmarg.org

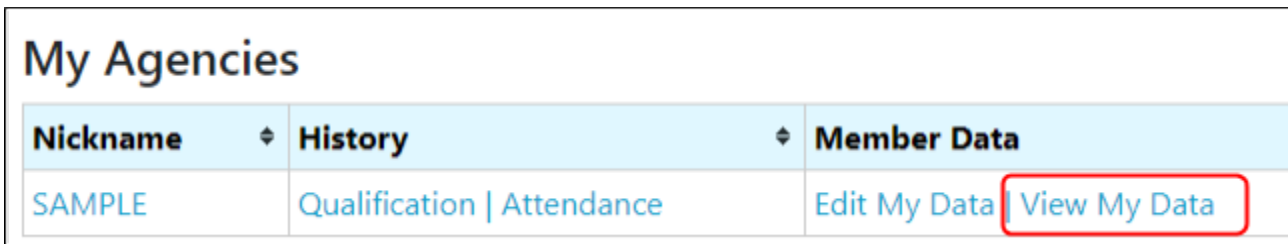
A customizable report for a list of alerts .

**Available from:** Agency Detail dropdown menu, "Reports", "Date Alert Reports"



	A	B	C	D	E	F	G	H	I	J	K
1	Alert Date	Date Field	First Name	Last Name	Member Status	Member Category	Member Id	Date Value	Days	Email Admin	Email Member
2	8/3/2020	SARTECH Expiration Date	Minnie	Admin	Active	Ground	101	11/1/2020	-90	Yes	Yes
3	10/4/2020	CPR AED Expiration Date	Jane	Doe	Active	Canine Handler	102	1/2/2021	-90	Yes	Yes
4	10/4/2020	First Aid Expiration Date	Jane	Doe	Active	Canine Handler	102	1/2/2021	-90	Yes	Yes
5	12/1/2020	SARTECH Expiration Date	Jane	Doe	Active	Canine Handler	102	3/1/2021	-90	Yes	Yes
6											
7											

For the member, available from: My Profile, My Agencies, View My Data



For the admin, available from Member Detail. Starting from Agency Detail, click on Members, and then the member name.

The date alerts for the member will appear at the bottom of the page for both the member's profile page and the admin's view of the Member Detail:

Date Alerts						
Field	Field Date	Alert Days	Alert Date	Email Admin?	Email Member?	
CPR AED Expiration Date	2022-06-01	-90	2022-03-03	Yes	Yes	
First Aid Expiration Date	2022-06-01	-90	2022-03-03	Yes	Yes	
SARTECH Expiration Date	2020-11-01	-90	2020-08-03	Yes	Yes	