**✅ DASHBOARD - SMART ALERTS**

*Modular, role-based, and action-driven alert system for practice management.*

**💡 Core Features**

* Automatically shows alerts for documents, contracts, protocols, trainings, etc.
* Alerts appear directly on the dashboard based on urgency
* All alerts are actionable: **upload**, **plan**, **message**, or ➕ **add to-do item**
* Optional: **auto-escalation**, **weekly manager summaries**, **role-based filtering**

**1.📚 ALERT CATEGORIES WITH ACTIONS**

**🎉 Birthdays & Work Anniversaries**

🎂 **Employee birthday** → 3 days before + same day  
🏅 **Anniversary** (1, 2, 3+ years) → 7 days before + same day

**Actions:**

* Send message
* Create announcement
* ➕ Add to-do item

**📃 Contracts**

📅 **Ending soon** → Alerts at 45, 30, and 7 days  
🔴 🚨 **Already expired** → Immediate alert

📄 **Signature request** not completed (after 3 days)

**Actions:**

* Generate new contract
* Send message
* ➕ Add to-do item

**⏱️ Time tracker - Open Requests**

📝 **Leave request pending** 7 days, and 3 days after request (legal auto-approval after 14 days)

**Actions:**

* Send reminder
* Sign document
* ➕ Add to-do item

**📅 Upcoming Meetings**

📆 **Meetings in next 7 days** → Alerts at 7, 3, and 1 day(s) (for example a review)

**Actions:**

* Confirm (?)
* Reschedule
* Send message
* ➕ Add to-do item

**⚙️ Due Maintenance & Tickets**

🛠️ **Maintenance** → Alert 30, 7, and 1 day before + after expiry  
🔴 🚨 **Ticket open for 7+ days** → Escalate after 14 days

**Actions:**

* Send message
* Plan now
* ➕ Add to-do item

📎 **Onboarding steps incomplete** (on the day and after 3 days, comes back)

**Actions:**

* Send message
* Plan now
* ➕ Add to-do item

**📑 Protocols & Quality**

📜 **Outdated protocols** (>12 months) → Alert at 11 and 12 months  
📌 **New protocol unread** → After 7 days

**Actions:**

* Mark as reviewed
* Send message
* ➕ Add to-do item

**👥 HR**

👤 **Onboarding incomplete** (on the day and after 3 days, comes back)  
🎓 **Training / exam not completed** → Alerts at 14, 7, and 1 day(s)  
📎 **Missing documents** → Alert 7 days after start date

🔔 **Expiring soon**  
→ Appears **45,** **30, 14, and 3 days** before deadline

🔴 🚨 **Already expired**  
→ Immediate alert after deadline

❗ **Not uploaded / not signed**  
→ Reminder after **3 days**, then **weekly**

**Actions:**

* Send reminder (individual or bulk)
* Upload document directly
* ➕ Add to-do item

❗ **Schedule conflict** → immediate alert  
Will be added with schedule 2.0

**2. 📊 EXPIRING ITEMS – UX LIFECYCLE**

| **Status** | **Days to Expiry** | **Visual** | **Urgency** |
| --- | --- | --- | --- |
| 🟠 **Upcoming** | 30–15 days | Orange – “Upcoming” | Low |
| 🟡 **Approaching** | 14–4 days | Yellow – “Due soon” | Medium |
| 🔴 **Critical** | ≤3 days | Red – “Urgent” | High |
| 🚨 **Expired** | 0 or less | Red + Warning – “Expired” | Highest |

* Appears on dashboard from **30 days** before deadline
* **Visibility and urgency** increase over time
* Switches state **automatically** on/after expiration

**3. 🔄 Escalation & Escapability**

* 🔁 **Auto-escalate** to superadmin or manager after X days of inaction
* ⏸ **Snooze alerts** (with reason & duration)
* ✅ **Mark as resolved / not relevant** (logged in audit trail)
* ➕ **Add to-do item** is always available

**4. 📬 Weekly Manager Summary**

**Sent every Monday at 08:00**, e.g.:

“This week:  
🔴 2 expired contracts  
🛠️ 1 overdue maintenance  
📁 3 documents missing”

✅ Configurable per **role**, **category**, or **location**  
➡️ Responsible staff see only relevant alerts (e.g. equipment managers see equipment alerts only)

**🖥️ Alert Overview Page**

**Filters:**

* Category
* Role
* Deadline
* Severity

**Views:**

* List / Grid
* Grouped by type

**Bulk Actions:**

* Send reminder
* Upload
* Add to-do
* Mark as resolved

**Visuals:**

* 🚨 Red icon for critical alerts
* Progress bars for grouped items (e.g. onboarding 4/6 complete)
* Expand / collapse alert groups