

# Alert Management

In this chapter, we look at the Alert Management module.

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- Alert Manager Set up
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- Enquiries

# Introduction

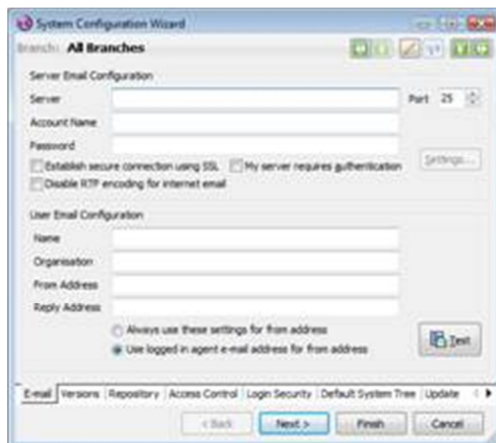
The Alert Manager module extends your customer, supplier, inventory, and contact management processing. It lets you stay in contact with your customers or suppliers, either via SMS's and/or Emails.

Most companies require a bulk-messaging tool to be in contact with their customers and/or supplier. The most cost effective way is to send out bulk SMS's and emails to inform customer or suppliers of specials, account balances, payments that are due, closing times, contact details and so on. You use this module if you have regular activity between you and your customers and/or suppliers. The workflow of the Alert Manager module:

- Register with our Pastel SMS portal and purchase SMS bundles.



- Set up the default sending email address using the System Wizard.



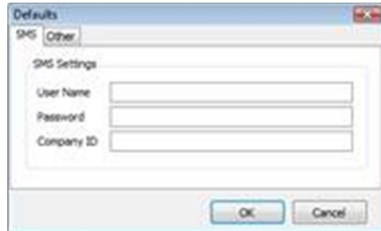
- Ensure that your customer and supplier master files contain valid contact details, especially cell phone numbers and email addresses.
- Create SMS and/or email templates.
- Send the SMS's and/or emails.
- Perform detailed enquiries about successful and unsuccessful transactions.

# Alert Manager Set up

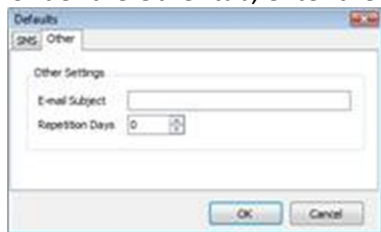
## Defaults

To access this function, choose the Maintenance...Alert Manager...Defaults menu option. On the system tree, choose the Alert Manager...Maintenance and select the Defaults dialogue.

Under the SMS tab, enter your Pastel SMS login details.

A screenshot of the 'Defaults' dialog box with the 'SMS' tab selected. The 'SMS Settings' section contains three input fields: 'User Name', 'Password', and 'Company ID'. At the bottom right are 'OK' and 'Cancel' buttons.

Under the Other tab, enter the Email subject and specify after how many days it should be repeated.

A screenshot of the 'Defaults' dialog box with the 'Other' tab selected. The 'Other Settings' section contains two input fields: 'E-mail Subject' and 'Repetition Days' (which has a spinner control). At the bottom right are 'OK' and 'Cancel' buttons.

## Templates

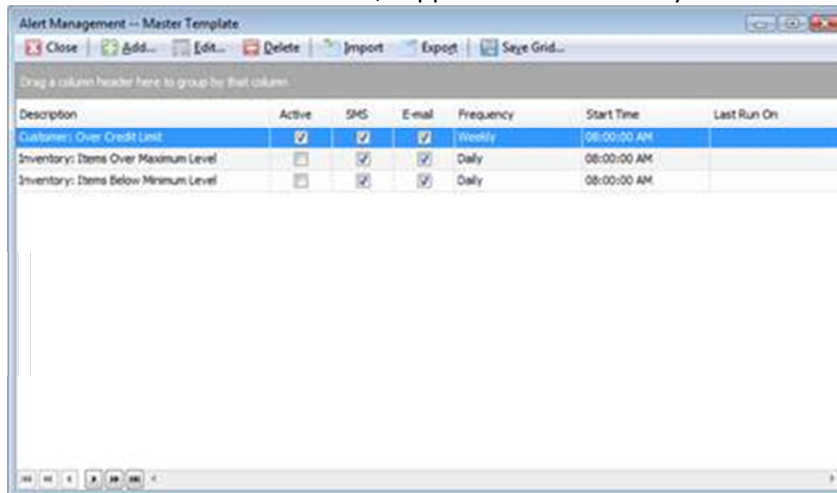
You have 3 types of templates that you can create for both your customers and suppliers:

- Master Templates
- Transaction Templates
- Custom Events

To access this function, choose the Maintenance...Alert Manager...Templates menu option. On the system tree, choose the Alert Manager...Maintenance function and then choose the Template option in the work area. Note that this function does not display directly on the system tree.

## Master Templates

Enter a description of the template in the applicable field, thereafter, select the affected module. You can select either customer, supplier or the inventory module.

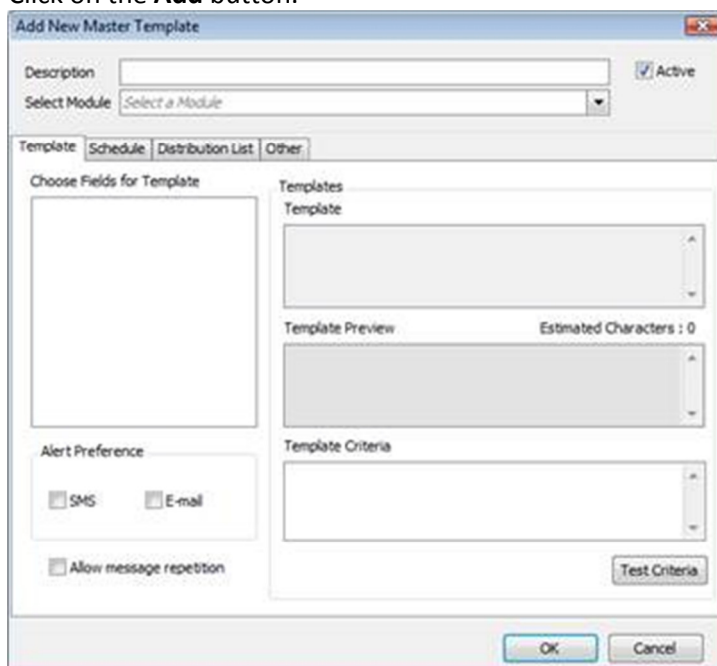


The screenshot shows a window titled 'Alert Management - Master Template'. It contains a table with the following data:

| Description                          | Active                              | SMS                                 | E-mail                              | Frequency | Start Time  | Last Run On |
|--------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-----------|-------------|-------------|
| Customer: Over Credit Limit          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Weekly    | 08:00:00 AM |             |
| Inventory: Items Over Maximum Level  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Daily     | 08:00:00 AM |             |
| Inventory: Items Below Minimum Level | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Daily     | 08:00:00 AM |             |

The section headers will allow you to set up the message, schedule, the customer/supplier range and other notification structures.

Click on the **Add** button.



The screenshot shows the 'Add New Master Template' dialog box. It includes the following fields and sections:

- Description:** A text input field.
- Select Module:** A dropdown menu with the text 'Select a Module'.
- Active:** A checkbox that is currently checked.
- Template:** A tabbed interface with 'Schedule', 'Distribution List', and 'Other' tabs. The 'Schedule' tab is selected.
- Choose Fields for Template:** A large empty box for selecting fields.
- Alert Preference:** Two checkboxes for 'SMS' and 'E-mail', both of which are unchecked.
- Allow message repetition:** A checkbox that is unchecked.
- Templates:** A section containing a 'Template' text area, a 'Template Preview' text area, and a 'Template Criteria' text area.
- Estimated Characters:** A label showing '0'.
- Test Criteria:** A button located at the bottom right of the 'Template Criteria' section.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom of the dialog.

### Template tab

After selecting the affected or applicable module, the Choose Fields for Template window is populated with the respective tables. You will use these table names to populate the template content by dragging and dropping the table name into the Template window. Remember to structure the message by dragging and dropping the table names in the format or order that your message should display.

Choose Fields for Template

Account  
AccountTermDescription  
AccountTerms  
Addressee  
Age1Desc  
Age2Desc  
Age3Desc  
Age4Desc  
Age5Desc  
Age6Desc  
Age7Desc

Alert Preference

☒ SMS ☒ E-mail

☐ Allow message repetition

Templates

Template

Hello %Name%, your Account Balance is over Credit Limit  
Credit Limit : %Credit\_Limit%  
Balance : %DCBalance%

Template Preview Estimated Characters : 111

Hello Name, your Account Balance is over Credit Limit  
Credit Limit : Credit\_Limit  
Balance : DCBalance

Template Criteria

Credit\_Limit < DCBalance

Test Criteria

The Template Preview window allows you to view how the message will display.

Specify the Template criteria.

Click on the Test Criteria button to test the criteria. If the criteria is invalid, the system will inform you.

Select the Alert Preference to either be SMS or Email or both.

If you want the message to repeat several times during the specified time frame, check the Allow message repetition check box.

### Schedule

Set up the alert schedule by specifying the daily, weekly or monthly frequencies.

SMS Schedule

☒ Time Interval ☐ Daily ☐ Weekly ☐ Monthly

Daily Schedule

☒ Every Day ☐ Weekdays ☐ Every [ ] day(s)

Weekly Schedule

Recur every [0] week(s) on

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday  
☐ Friday ☐ Saturday ☐ Sunday

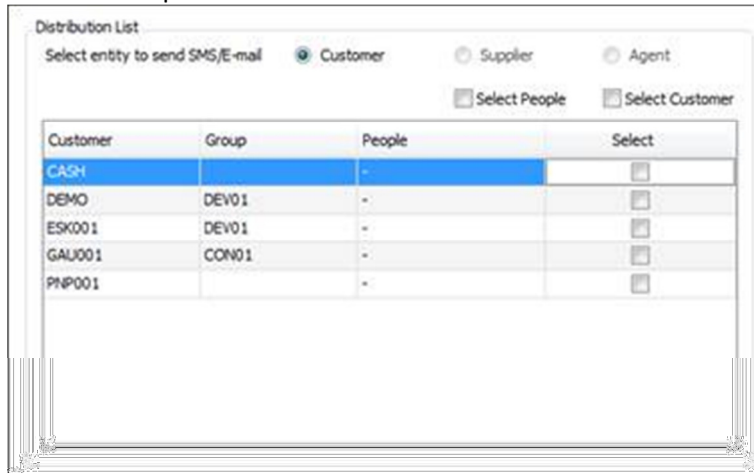
Frequency

Start Time 05:00 AM Time Interval 90 Minutes End Time 05:00 PM

#### Distribution tab

Select the affected customers, suppliers or items.

Affected People can also be selected.



Distribution List

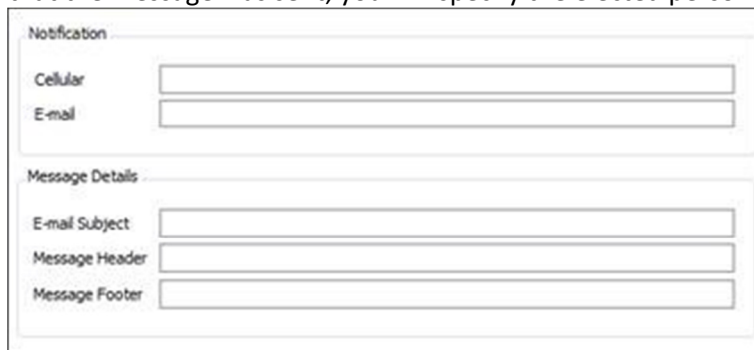
Select entity to send SMS/E-mail: ☒ Customer ☐ Supplier ☐ Agent

☐ Select People ☐ Select Customer

| Customer | Group | People | Select                   |
|----------|-------|--------|--------------------------|
| CASH     |       | -      | <input type="checkbox"/> |
| DEMO     | DEV01 | -      | <input type="checkbox"/> |
| ESK001   | DEV01 | -      | <input type="checkbox"/> |
| GAU001   | CON01 | -      | <input type="checkbox"/> |
| PNP001   |       | -      | <input type="checkbox"/> |

#### Other tab

If you want the message to be sent to an internal staff member to view the message and to confirm that the message was sent, you will specify the elected person's and message details here.



Notification

Cellular:

E-mail:

Message Details

E-mail Subject:

Message Header:

Message Footer:

#### Transaction Templates

Enter a description of the transaction template in the applicable field, thereafter, select the affected document. You can select either sales order, credit note or job card

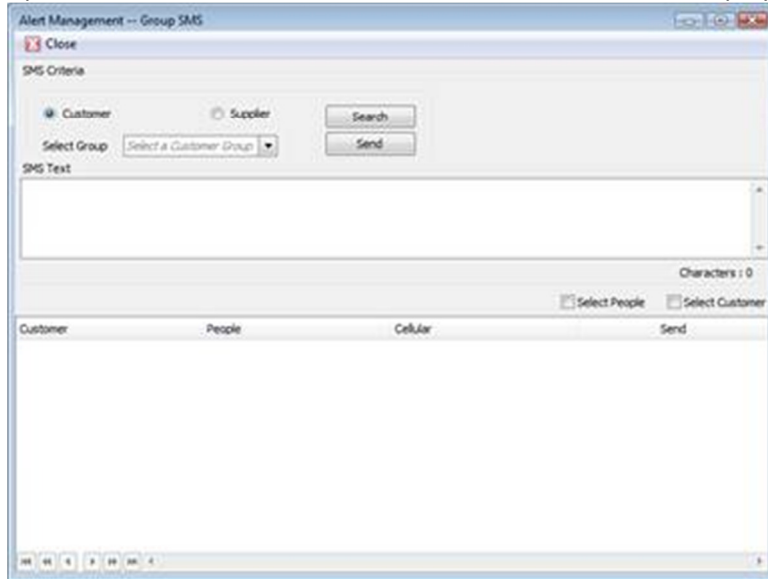
The section headers will allow you to set up the message, the customer/supplier range and other notification structures.

#### Custom Templates

Customise or personalise alert messages for your customer, supplier or inventory items by using this option. The same conditions apply.

# Alert Manager Transactions

To access this function, choose the Transactions...Alert Manager...Group SMS menu option. On the system tree, choose the Alert Manager...Transactions function and then choose the Group SMS option in the work area. Note that this function does not display directly on the system tree.



The screenshot shows a software window titled "Alert Management -- Group SMS". It features a "Close" button in the top-left corner. Below the title bar, there is a section for "SMS Criteria" with two radio buttons: "Customer" (selected) and "Supplier". To the right of these are "Search" and "Send" buttons. Below the radio buttons is a "Select Group" label and a dropdown menu currently showing "Select a Customer Group". Underneath this is a large text area for "SMS Text". To the right of the text area, it says "Characters : 0". Below the text area are two checkboxes: "Select People" and "Select Customer". At the bottom of the window is a table with four columns: "Customer", "People", "Cellular", and "Send". The table is currently empty. At the very bottom of the window, there is a status bar with some small, illegible text.

Select your target as customers or suppliers. If you have customers or suppliers linked to groups, you can select the applicable group. The customers or suppliers linked to the selected group will be listed in the grid below by clicking on the Search button.

Specify the SMS content in this section of the screen.

The customers or suppliers will be listed in this grid after clicking on the Search button.

After you have made your selections, click on the Send button to send the SMS to the selected target audience.

# Enquiries

This option allows you to enquire about:

- successfully sent items
- items that are still pending in your outbox or did not send successfully
- transaction activity logs with regard to your templates and transactions

