Alert Management

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

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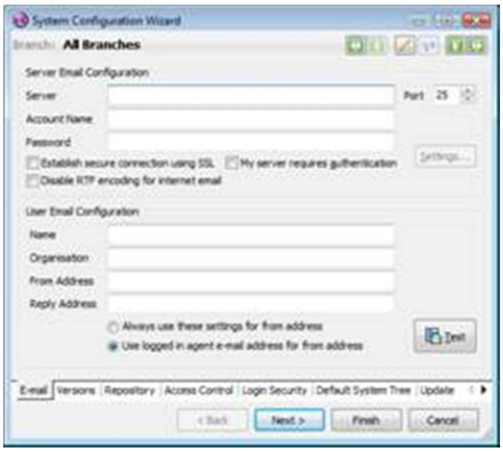
Introduction

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.

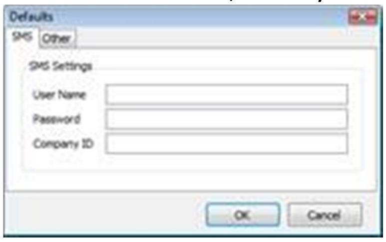


- Ensure that your customer and supplier master files contain valid contact details, especially cell phone numbers and email addresses.
- Create SMS and/or email templates.
- Send the SMS's and/or emails.
- Perform detailed enquiries about successful and unsuccessful transactions.

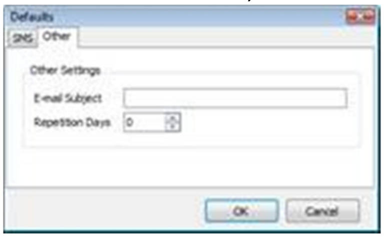
Alert Manager Set up

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.



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



Templates

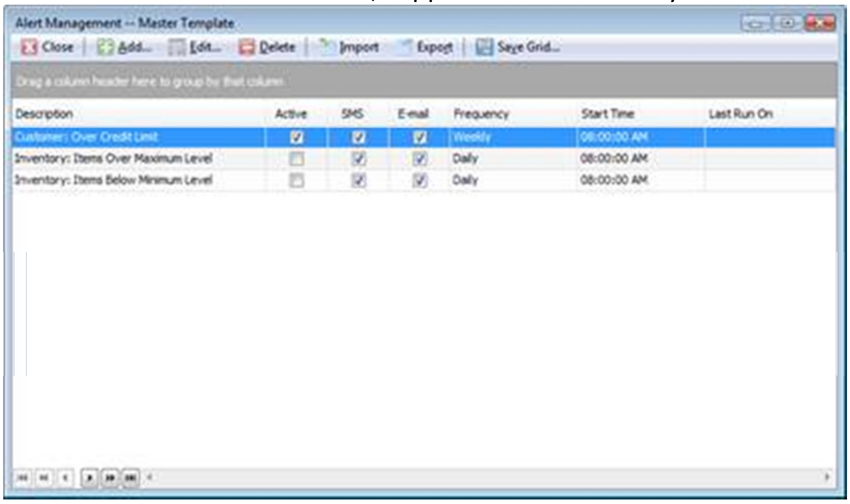
You have 3 types of templates that you can create for both your customers and suppliers:

- 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.

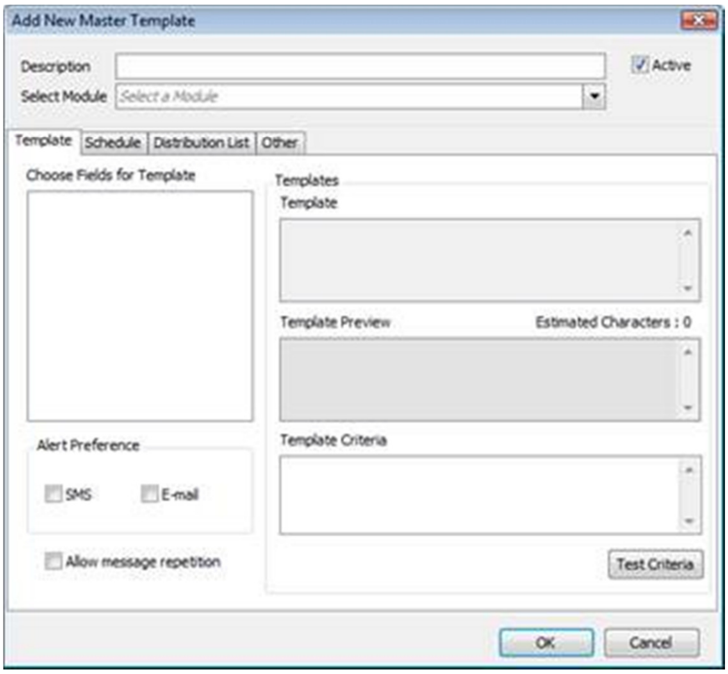
Master Templates

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.



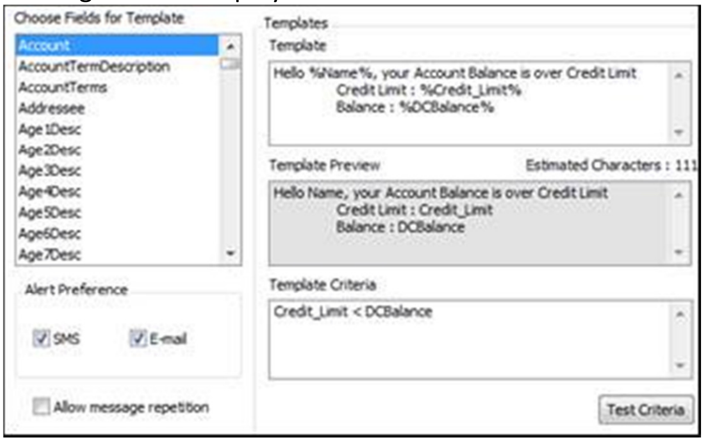
The section headers will allow you to set up the message, schedule, the customer/supplier range and other notification structures.

Click on the **Add** button.



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.



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

Specify the Template criteria.

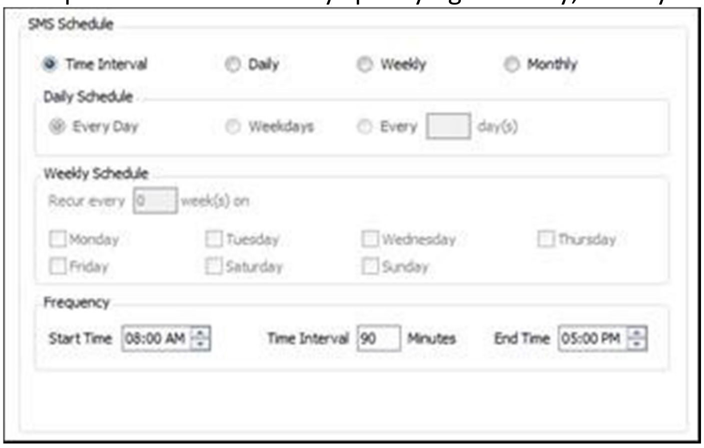
Click on the Test Criteria button to test the criteria. If the criteria is invalid, the system will inform you.

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.

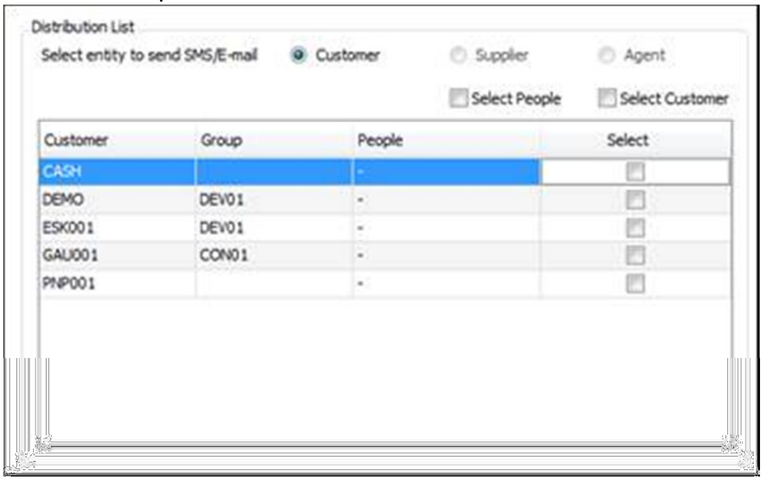
Schedule

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



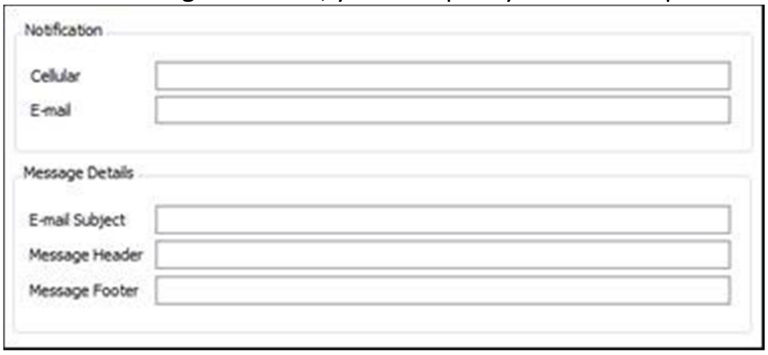
Distribution tab

Select the affected customers, suppliers or items.
Affected People can also be selected.



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.



Transaction Templates

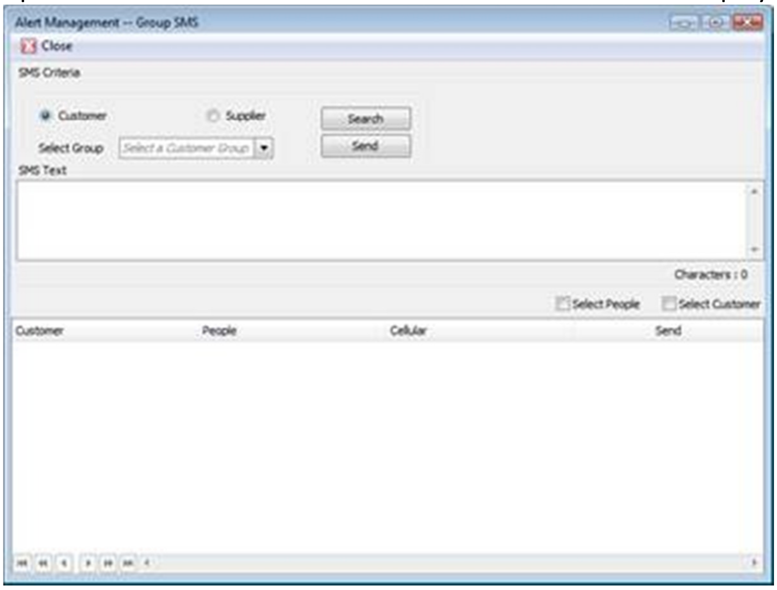
Enter a description of the transaction template in the applicable field, thereafter, select the affected document. You can select either sales order, credit note or job card
The section headers will allow you to set up the message, the customer/supplier range and other notification structures.

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.



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