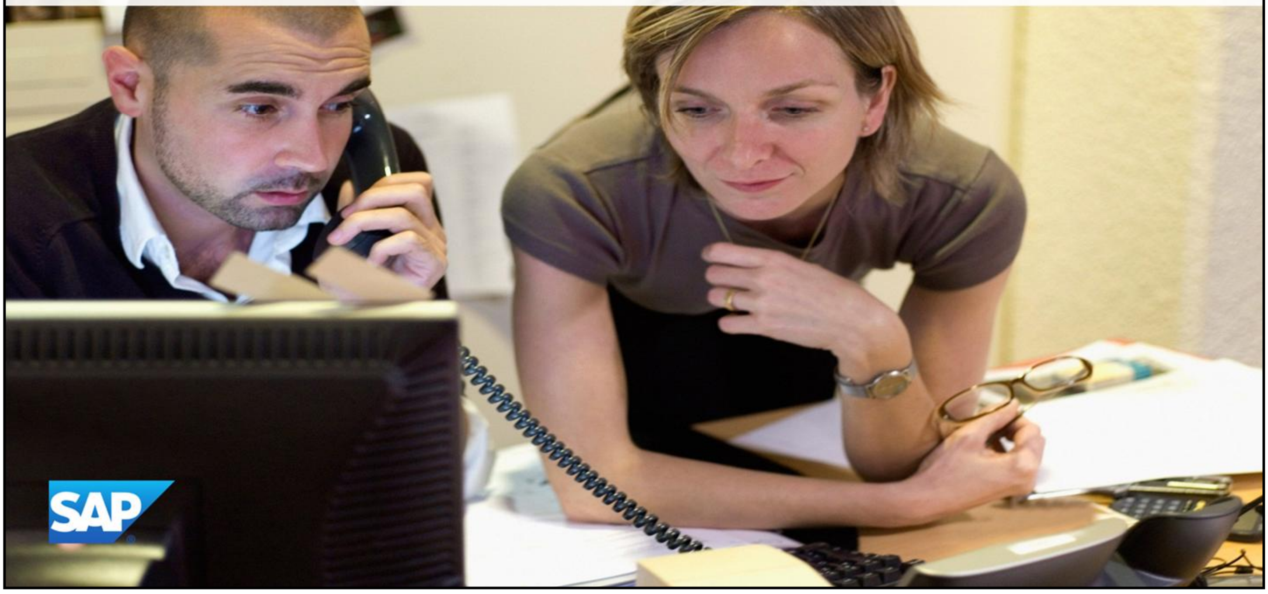
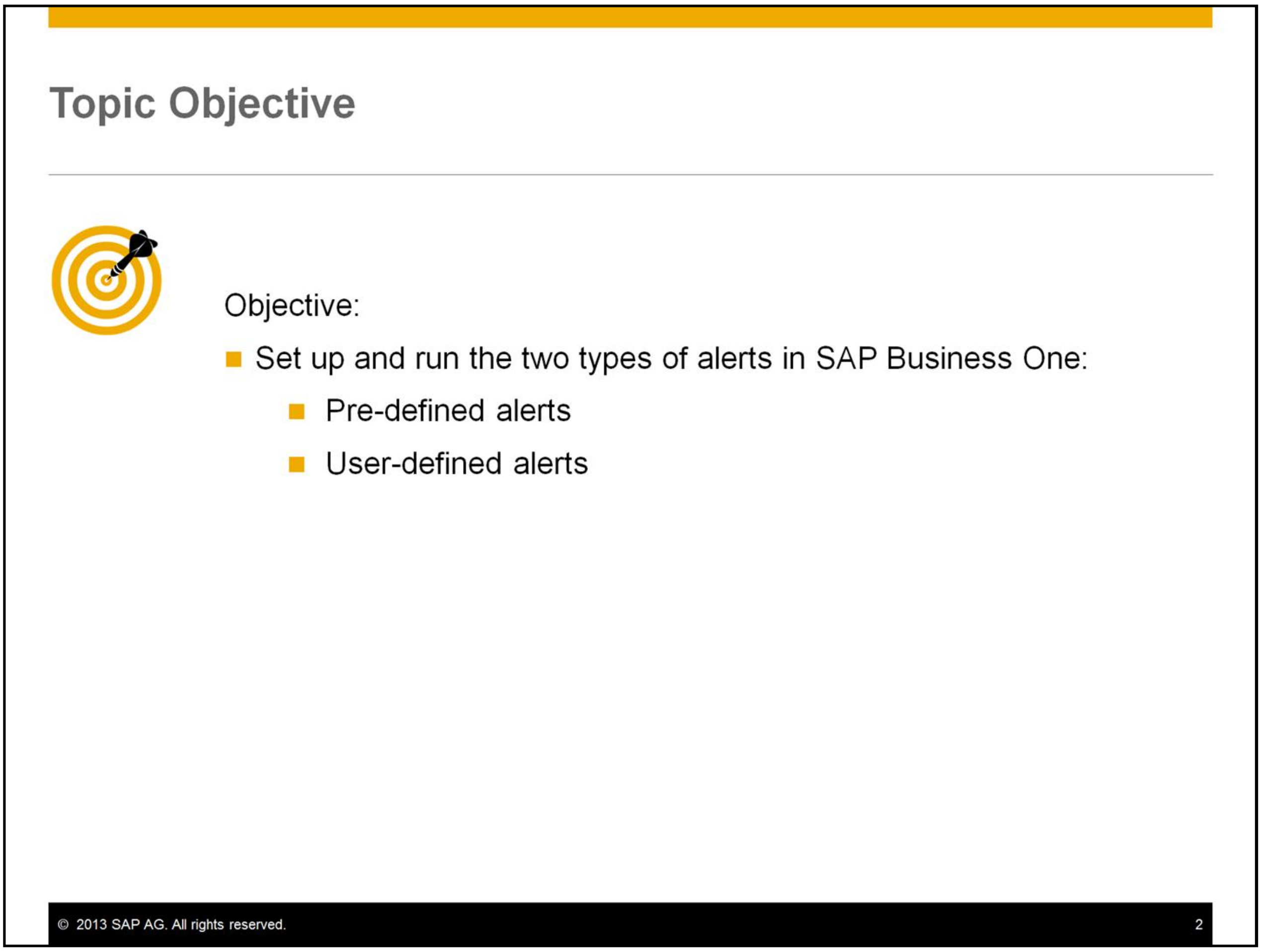
Customization Tools: Alerts

SAP Business One
Release 9.0



Welcome to the Alerts topic.



In this topic, we cover the alert mechanism provided in the SAP Business One application.

You will learn how to set up and run the two types of alerts – pre-defined alerts and user-defined alerts.

Alerts: Business Scenario

- The purchasing manager wants to be notified automatically as soon as an inventory item falls below the minimum stock quantity. On receiving the notification, the manager can decide whether to reorder stock.

Solution: Use a predefined alert.

Let us look at a business example for an alert. In the example shown here, the purchasing manager wants to be notified automatically as soon as an inventory item falls below a the minimum stock quantity. On receiving the notification, the manager can decide whether to reorder stock.

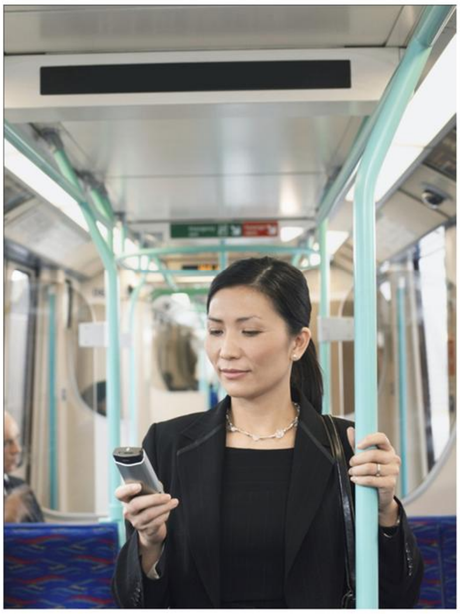
This example is a fairly simple requirement and can easily be set up using a predefined alert in the system.

SAP Business One can also support more complex requirements with the addition of queries.

Alerts Management

Administration > Alerts Management

- Alerts inform users when a specific business event or condition occurs
- Can also be used to create work lists for a user
- To receive alert, user must have a user account



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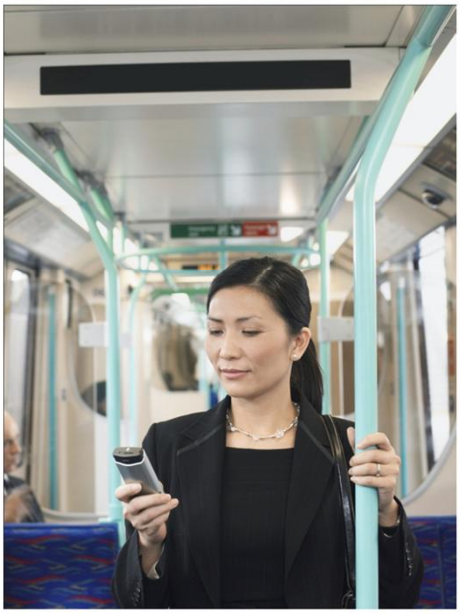
- The alert mechanism in SAP Business One informs one or more users when a certain event or condition occurs. It is important to realize that alerts do not prevent the event from occurring. The alert notifies you after the event has happened.
- A creative use of alerts is as a task list or work order for a person. For example, you can create a list of new A/P invoices and send the list using an alert to the AP manager on a daily or weekly basis for final review.
- To receive an alert, a user must have a user account in SAP Business One.

There are two ways to set up an alert.

You can use one of the predefined alerts supplied with SAP Business One, or, you can create your own alert based on a query.

Predefined Alerts

- Predefined alerts cover common alert situations, including:
  - Deviation from % of Gross Profit
  - Deviation from Commitment Limit
  - Deviation from Credit Limit
  - Deviation from Discount (in %)
  - Deviation from Budget
  - Minimum Stock Deviation
  - MRP Recommendations Due
- Choose *Administration > Alerts Management*, then type * in the *Name* field, and choose *Find*



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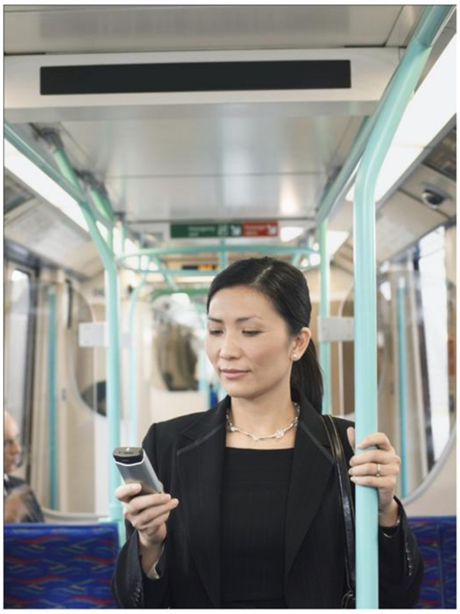
- The simplest way to use the alert mechanism is to use one of the predefined alerts. These cover common business situations where alerts are typically used.
- To see the list of predefined alerts, choose *Administration > Alerts Management*, then type ***** in the *Name* field, and choose *Find*.

Predefined Alerts

- Predefined alerts cover common alert situations, including:
  - **Deviation from % of Gross Profit**
  - **Deviation from Commitment Limit**
  - **Deviation from Credit Limit**
  - **Deviation from Discount (in %)**
  - Deviation from Budget
  - Minimum Stock Deviation
  - MRP Recommendations Due



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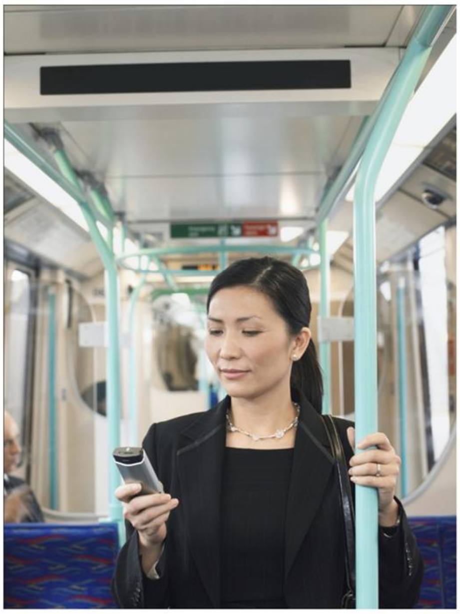
The deviation from gross profit, deviation from committment and credit limits, and discount alerts can be applied to sales documents.

Predefined Alerts

- Predefined alerts cover common alert situations, including:
  - Deviation from % of Gross Profit
  - Deviation from Commitment Limit
  - Deviation from Credit Limit
  - Deviation from Discount (in %)
  - **Deviation from Budget**
  - Minimum Stock Deviation
  - MRP Recommendations Due



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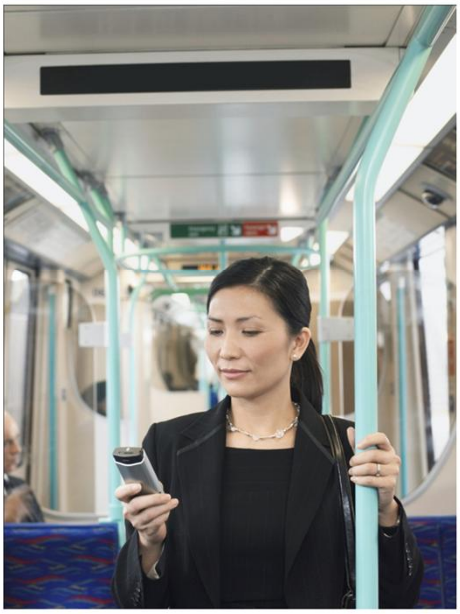
The predefined alert for budget deviation can be applied to purchasing documents, payments, and journal entries. This alert is independent of the budget warning set in the *General Settings*.

Predefined Alerts

- Predefined alerts cover common alert situations, including:
  - Deviation from % of Gross Profit
  - Deviation from Commitment Limit
  - Deviation from Credit Limit
  - Deviation from Discount (in %)
  - Deviation from Budget
  - **Minimum Stock Deviation**
  - **MRP Recommendations Due**



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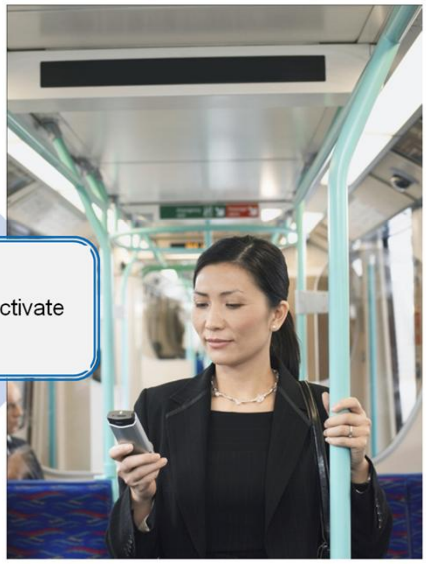
- The minimum stock deviation alert applies when a release document is added that takes the stock level below the minimum defined in the item master data. This alert is not issued if inventory blocking is enabled in the Document Settings.
- The MRP alert provides a reminder when an MRP recommendation is due for release within a selectable time frame.

Setting up Predefined Alerts

- Select users and preferred notification methods

Users → Notification methods* → Conditions and Documents → Priority → Activate

Internal, Email, SMS, Fax, and Mobile notifications available.



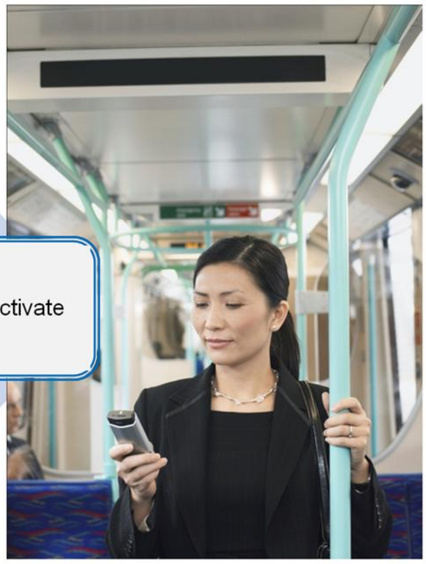
- To use a predefined alert, select the names of the users you want to receive the notification, then select one or more preferred mechanisms for notifying each user.
- Internal alerts appear in the *Messages/Alerts* popup window in the SAP Business One client, and you can also view these alerts from the cockpit.
- The email, SMS and fax mechanisms require the integration of these services with SAP Business One.
- The mobile smart phone mechanism requires the SAP Business One integration component.
- The email addresses and phone numbers must be set up in the user account.

Setting up Predefined Alerts

- Set conditions and select document types
- Alert will trigger immediately after document is added

Users → Notification methods* → Conditions and Documents → Priority → Activate

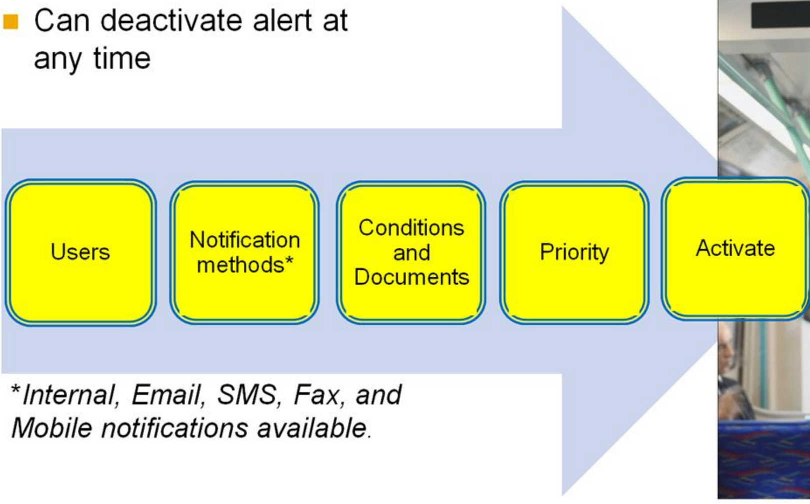
**Internal, Email, SMS, Fax, and Mobile notifications available.*



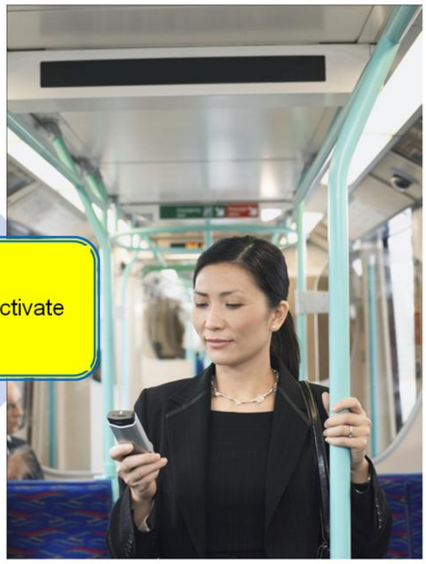
- For the predefined alerts, with the exception of minimum stock deviation, you can limit or expand the scope of the alert by setting conditions and selecting which document types will be checked for the alert situation.
- The alert will trigger immediately after the document is added to the system.

Setting up Predefined Alerts

- Assign priority and activate the alert
- Can deactivate alert at any time



**Internal, Email, SMS, Fax, and Mobile notifications available.*



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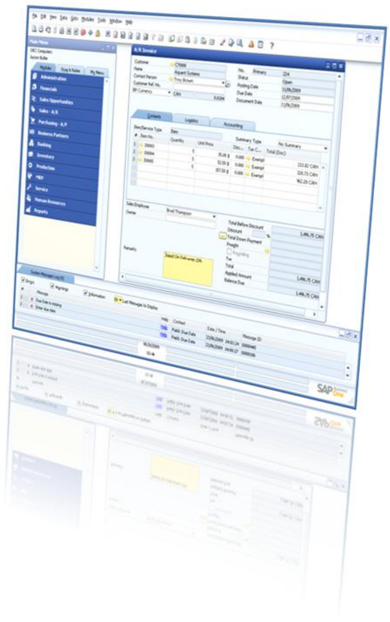
- You can assign a priority to an alert. When the message is received in the recipient’s messages/alerts window or Microsoft Outlook window, high priority messages are flagged in red.
- Finally, you must activate the alert for it to take effect, using the checkbox. You can also use this checkbox to deactivate an alert at any time.

Demo – Predefined Alerts

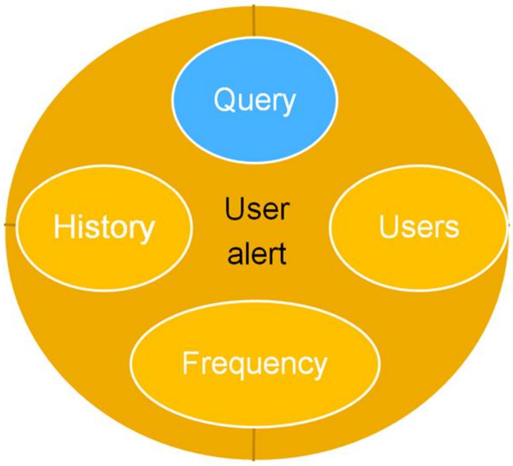


This demo will show you how to use predefined alerts in the system.

User-defined Alerts

Administration > Alerts Management

- Add own alerts based on saved user query
- To add a new alert, switch to *Add* mode and select saved user query
- Query specifies business conditions to trigger alert



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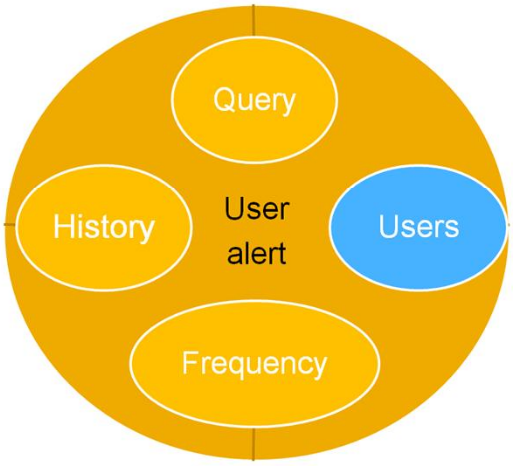
- You can add your own alerts bases on a saved user query. To create a new alert, switch to *Add* mode and select the saved user query.
- The query specifies the business conditions to trigger the alert. This enables alerts to be set for multiple conditions or for unique conditions specific to a business.
- For example, if you want to alert the budget manager whenever someone creates a purchase order with a total value above 5000, then your query will select purchase orders from the database with a value over 5000.

User-defined Alerts

Administration > Alerts Management

- Select users, notification mechanisms and priority, in the same way as for a predefined alert



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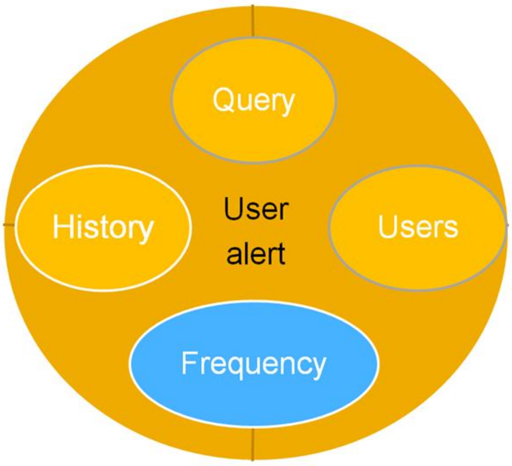
- Then select the users and the notification mechanisms, as well as the notification priority, in the same way as for predefined alerts.

User-defined Alerts

Administration > Alerts Management

- User-defined alert triggered when query runs and if conditions in query met
- Set frequency for running query (minutes, hours, days, weeks or months)
- If query conditions are not met, a notification is not sent



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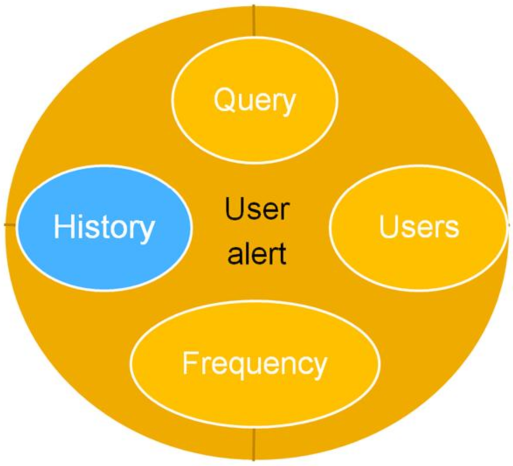
- Unlike a predefined alert, a user-defined alert is *not triggered* when a document is added to the system. A user-defined alert is triggered when the query runs and if the conditions in the query are met.
- Therefore you need to set the frequency for running the query (in minutes, hours, days, weeks or months). If you leave the frequency field empty, the alert is sent only once.
- When the query runs, an alert notification will be sent to the users if the query conditions are met. If the query conditions are not met, a notification is not sent.

User-defined Alerts

Administration > Alerts Management

- Internal alerts display query results in *Messages/Alerts Overview* window



Save History checkbox:
- If checked, new alert added to Messages / Overview window each time query runs
- If not checked, new alert overwrites previous alert and shows in bold

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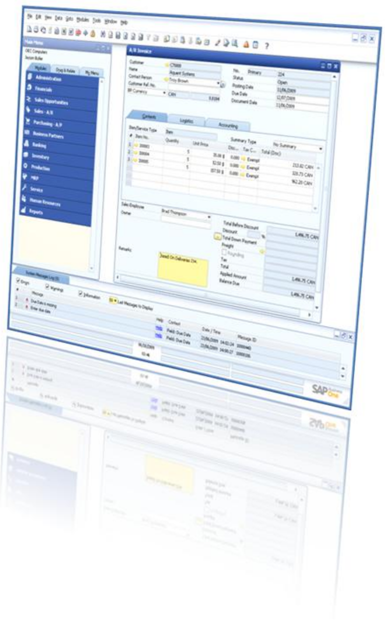
- Internal alerts display in the user's *Messages / Alerts Overview* window. If a query is used for the alert, the query results will show in this window.
- If you select the *Save History* checkbox, a new alert message is added to the alerts window each time the alert is triggered when the query runs. This can quickly fill up the alerts window if the same alert happens frequently.
- If you do not check *Save History* checkbox, each new alert will overwrite the previous one in the *Messages / Alerts Overview* window . The alert will change to bold to inform the user that a new alert has occurred.

Demo – User-Defined Alerts



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In this demo, you will see how to set up user-defined alerts in the system.

Writing Queries for User-defined Alerts

Consider frequency for running query and what results are sent in alert

Query	Frequency	Results
SELECT T0.[DocNum], T0.[CardCode], T0.[CardName] FROM OPOR T0 WHERE T0.[DocTotal] > 5000 and T0.[DocDate] = (CONVERT (date, GETDATE()))	Once a day at 23:59 hours	List of Purchase Orders > 5000 posted on the current day

If frequency set to once a day, query should limit results to documents added on that day

- When you develop queries for alerts, you need to consider the frequency for running the query, and what results should be sent in the alert to the user.
- In the example shown here, the alert is used to produce a work list for the following day based on new purchase orders entered the previous day. The query will report a list of purchase orders with total value over 5000 that have been posted during the current business day.
- If the frequency is set to once a day, then the query should limit the results to documents added on that day. Here the document posting date is compared to the current date obtained using the getdate() function.

Key Points

Key points from this topic:

- Alerts notify users when an event occurs
- There are two types of alerts:
  - Predefined alerts
  - User-defined alerts based on queries
- Predefined alerts trigger when a document is added that meets the specified conditions
- User-defined alerts trigger only when the query runs and produces results
- User-defined alerts also provide a way to create routine task lists for users

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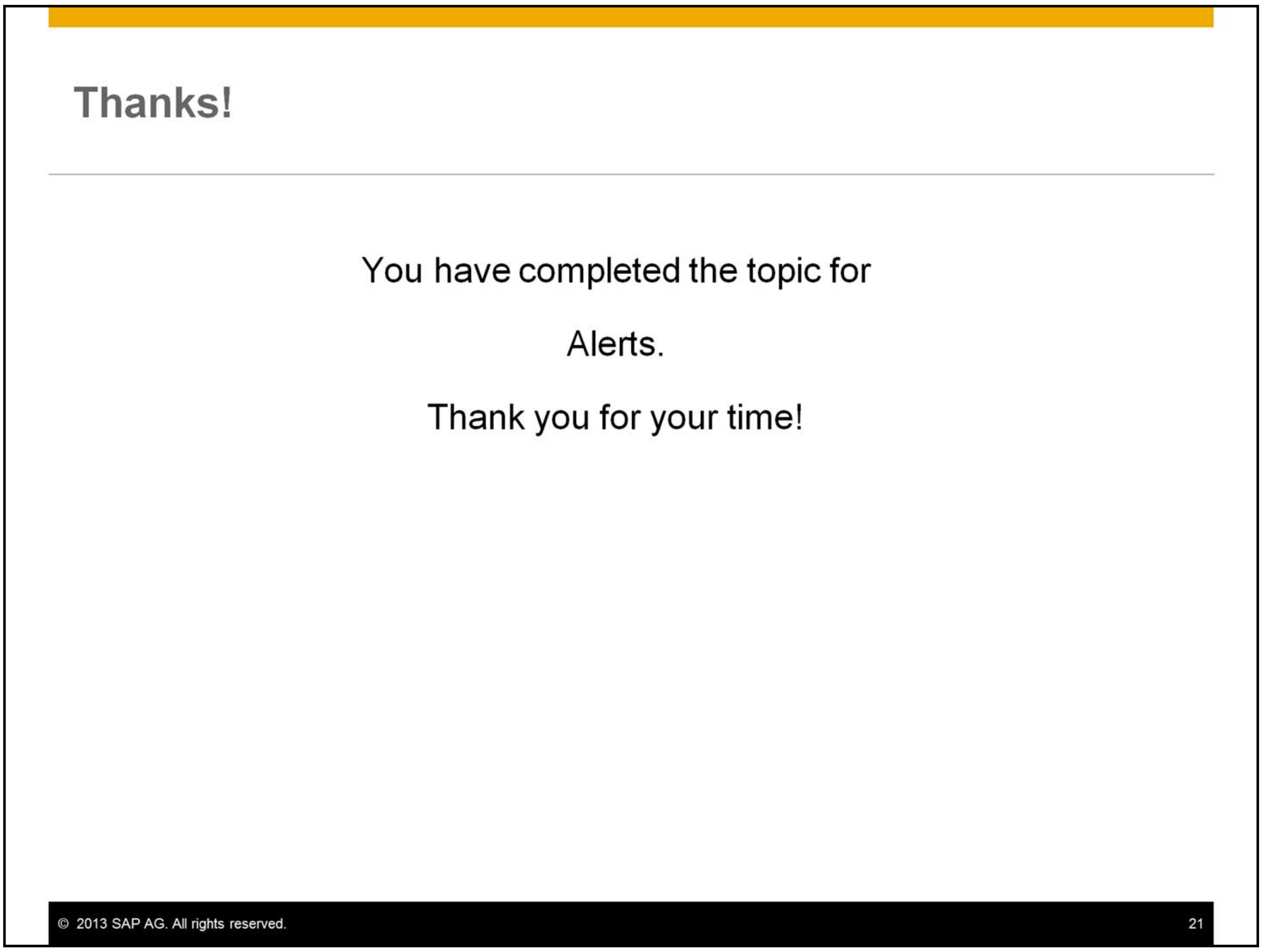
Here are some key points to take away from this session.

Please take a minute to review these key points:

- Alerts send notifications to users when certain events have occurred in the system. Remember that alerts only notify you after the event has occurred, and do not prevent documents being added to the system.
- Several predefined events are supplied that you can easily use, or you can add user-defined alerts based on user queries.
- Predefined alerts trigger when a document is added that meets the conditions specified in the alert.
- User-defined alerts trigger when the query runs, and then only if the query produces results. The query runs at the specified time interval, and the result of the query is sent as the alert to the users.
- User-defined alerts can be used to notify users of complex or unique business situations. You can also use user-defined alerts to create routine task lists for users.



You have completed the topic for alerts in SAP Business One. Thank you for your time!