



Unit: Customization Tools

Topic: Alerts Management

1-1 Set an Alert when the Gross Profit in a Sales document falls below 30%

The company owner wants to be notified when a sales order is issued with the gross profit falling below 30%. This uses one of the preconfigured alerts supplied with the system.

Choose *Administration* → *Alerts Management*.

The window opens in *Find* mode. Type * in the *Name* field and choose **Find**.

Select the *Deviation from % of Gross Profit* alert. In the *Conditions* tab, type **30** as the Profit Percentage.

Apply to **Sales Orders** using the *Documents* tab.

Select the *Int.* checkbox for the user **manager**.

Select the *Active* checkbox.

Choose **Update**.

Create a sales order and change the **Unit Price** so that the *Gross Profit* falls below 30%. You can check the gross profit by opening the **Gross Profit** window from the sales order. Base the Gross Profit on the Item Cost.

Save the sales order.

The alerts window will open and display the alert. If the alert window does not open, choose *Window* → *Messages/Alert Overview*.

Note: Choose *Administration* → *General Settings* and select the *Services* tab. The *Update Messages* field value determines how often the application checks the window for updates

1-2 Set an Alert for Quotations with a Document Total Greater than 15000

A manager wants to review sales quotations issued for the day that exceed 15000. Since the process does not need to be blocked, this can be met using an alert based on a query. The query will be set to run once a day, and will show the eligible sales quotations for that day.

1-2-1 Create a Query for the Alert

Choose *Tools* → *Queries* → *Query Generator*.

Enter tables **OQUT** and **OSLP** in the *Table* column.

Select **DocNum**, **CardName**, and **DocTotal** from the **OQUT** table (T0).

Select **SlpName** from the **OSLP** table (T1).

Enter the following **Where** clause to display only quotations with a document total greater than 15000 issued on today's date:

T0.[DocTotal] > 15000 and T0.[DocDate] = (CONVERT (date, GETDATE()))

Save the query with the name '**Quotations > 15000**' in a new category called **Alerts**.

1-2-2 Define the alert

Choose *Administration* → *Alerts Management*.

Switch to *Add* mode.

Enter **Quotations > 15000** in the *Name* field.

Set the *Active* indicator.

Choose *Open Saved Query*.

Select the query '**Quotations > 15000**' in the **Alerts** category.

Choose *OK*.

Enter the frequency: For the purposes of this demo, set the frequency to every 2 minutes instead of every 1 day.

Set the *Int.* indicator for the user *manager*.

Choose *Add*.

1-2-3 Test the alert

Create a sales quotation for a document total greater than 15000. The posting date should be today's date.

You will be able to add the document.

Create a second sales quotation with a total greater than 15000 and with a posting date that is different from today's date.

You will receive an alert notification after 2 minutes. You should get an alert for the first quotation, but not for the second quotation.

Note: If you do not receive an alert in 2 minutes, set the *Update Messages* field value in the **Services** tab of the **General Settings** to 0.
