Setting Up Alerts

Last Modified on 05/12/2021 10:57 am EDT

Overview

A system Alert is used to communicate to a designated individual that a transaction has occurred and possible approval/review is needed. A system alert will indicate time, type of transaction, and who is responsible for approving or denying the transaction.

Set up a System Alert

To set up a system Alert, click on the Gear icon on the top right-hand corner of your home screen. Under the General section, select Alerts.

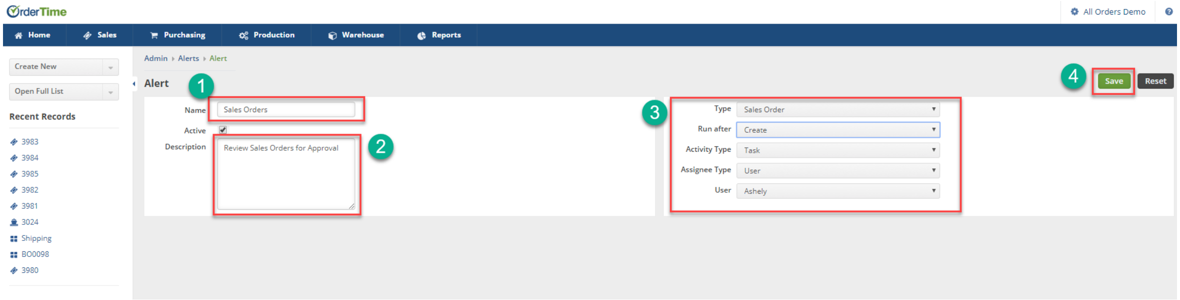
- You can generate an alert for each of your major transactions (i.e. Sales Order, Ship Doc, Receiving, Purchase Orders, Work Orders, Returns etc.). The system allows you to assign the alert to a group or an individual user.

To create an Alert complete the following steps:

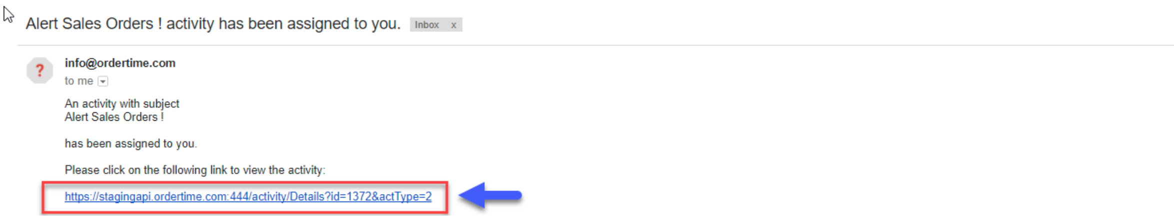
1. Type a name for your alert, designate an accurate name to your Alert so it can be easily identified by the user.
2. Enter a brief description for your Alert, define what the alert is for and what action is to be completed.
3. Under Type select the type of transaction you need an alert for (i.e. Sales Order, Ship Doc, Purchase Orders, Work Orders, Inventory etc.).
    - For Run After, you will be able to select when the Alert is generated.
    - For Activity Type, select one of your Tasks.
    - For Assignee Type, you will be able to select a group or an individual within your organization.
    - This User Group selection feature will allow you to alert for a whole set of individuals within your group.
        - The individual will assign the task to one person in your company to review/approve/decline the transaction.

> In order to have a user or group, you first need to generate users and group under Users & Roles.

4. Click on **Save** when Done.



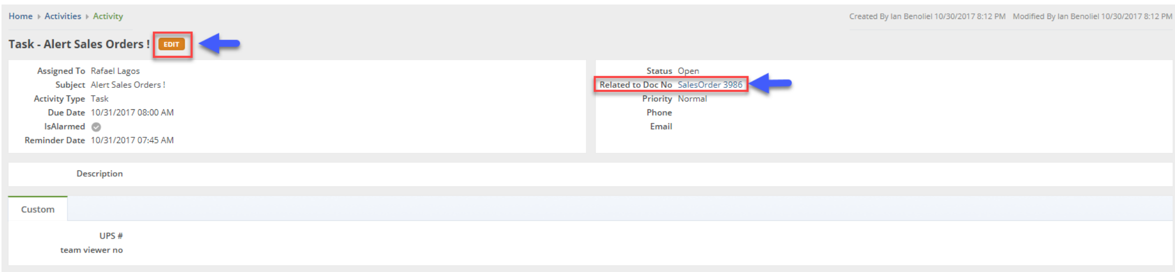
Depending on your setting, you will receive an Alert anytime a document is processed.



- Click on the link to review/approve/denied the transaction.

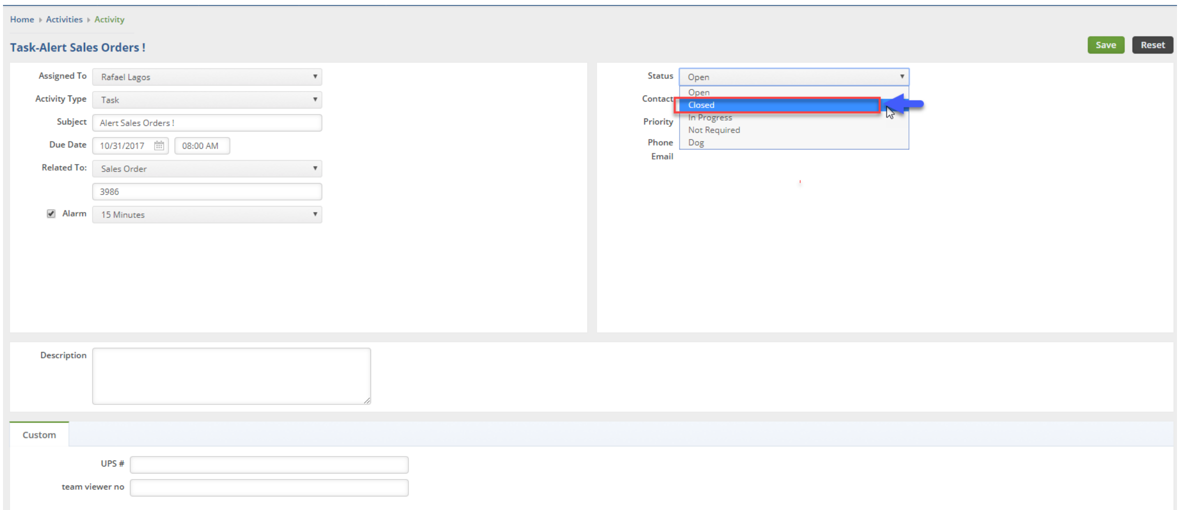
The link will take you to the Task section where you can review the task.

- Click on the "Related to Doc No" link to review the Document:
- Review transaction and Approve/Denied/ Cancel depending on your case.



To make your task completed, click on the **Edit** icon.

- Under the **Status** drop-down menu, select the desired action. Click on **Save** when done.



Run-After Conditions & Activity Types

Run-After Condition	Activity Type
Change Status	Email
Delete	Task
Create	Event
Modify	Call

Complete List of Alert Types

Record Type	Run After	Activity Type
Adjustment	Change Status	Task
	Delete	Event
	Create	Call
Receiver	Change Status	Email
	Delete	Task
	Create	Event
		Call
Work Order	Change Status	Task
	Delete	Event
	Create	Call
Ship Doc	Change Status	Email
	Delete	Task
	Create	Event
		Call
Transfer	Change Status	Task

	Delete	Event
	Create	Call
Purchase Order	Change Status	Email
	Delete	Task
	Create	Event
		Call
Sales Order	Change Status	Email
	Delete	Task
	Create	Event
		Call
Disassembly	Change Status	Task
	Delete	Event
	Create	Call
Customer Return	Change Status	Email
	Delete	Task
	Create	Event
		Call
Quote	Change Status	Email
	Delete	Task
	Create	Event
		Call
Value Adjustment	Change Status	Task
	Delete	Event

	Create	Call
Count	Change Status	Task
	Delete	Event
	Create	Call
Item	Change Status	Task
	Delete	Event
	Create	Call
	Modify	
Customer	Change Status	Task
	Delete	Event
	Create	Call
	Modify	
Vendor	Change Status	Task
	Delete	Event
	Create	Call
	Modify	
Location	Change Status	Task
	Delete	Event
	Create	Call
	Modify	
Lead	Change Status	Task
	Delete	Event
	Create	Call

	Modify	
Payment	Delete	Task
	Create	Event
	Modify	Call
Cart	Create	Task
	Change Status	Event
		Call

More about Order Management with Order Time