



# Achieve Alert Management

**USER MANUAL**

**Version 6.5**

**PRESENTED BY  
ACHIEVE IT SOLUTIONS**



**SAP<sup>®</sup> Certified**  
SAP Business One Integration

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**SAP<sup>®</sup> Certified**  
SAP Business One Integration

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# ACHIEVE ALERT MANAGEMENT USER GUIDE

## Table of Contents

<b>Introduction .....</b>	<b>2</b>
Version .....	3
Purpose .....	3
Setup: .....	3
<b>Achieve Alert Management configuration and Setup .....</b>	<b>4</b>
Alert – Settings.....	4
Defining Alert Settings .....	5
General Tab.....	5
SMS Tab.....	6
E-Mail Tab .....	7
SAP Alert Tab.....	8
FTP Setup tab .....	9
Alert Log tab.....	10
Configuring Alert Scheduler: .....	11
Defining Daily Alert Occurrences: .....	13
Defining Weekly Scheduler .....	18
Defining Monthly Scheduler .....	20
<b>Alert Setup .....</b>	<b>23</b>
Select Alert Type .....	23
Transaction Details.....	24
Query Details.....	25
Recipient Details: .....	26
Configuring SAP Internal Alert .....	30
Configuring SMS Alert .....	31
Configuring Printer Alert:.....	36
<b>Alert Log.....</b>	<b>41</b>
<b>Alert Import Export .....</b>	<b>42</b>
Importing an Alert Using the Alert Import Export Wizard .....	43
Exporting an Alert Using the Alert Import Export Wizard .....	46

## Introduction

If your business needs an alerts system based on transactions performed or an event in SAP Business One, then the **Achieve Alert Management** module is a comprehensive solution for you! The **Achieve Alert Management** module has been designed to generate alerts based on User Defined Events or on the Adding of or Updating of transactions. Alert can be sent via Email, SMS and/or SAP Alert.

**Achieve Alert management module** include the following features:

- *Setup and configuration*
  - Alert Settings
  - Email, SMS, SAP Alert, Fax
  - Alert Log
  - Ignore alert on Holidays provision
  - Make Scheduler for an event alert
  
- *Alert and Process*
  - Setup of Alert
  - Alert Log
  - Import and Export Alert Utility

## Version

This manual is specific to Version 6.5 of the **Achieve Alert Management Module**, which is distributed in conjunction with SAP Business One version 9.1 and above.

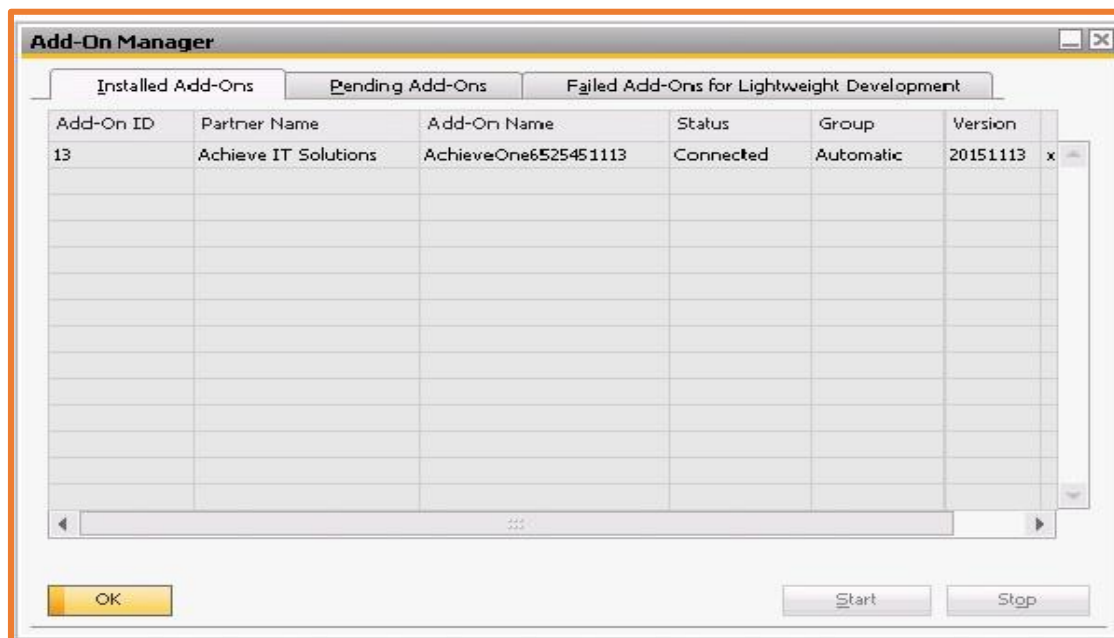
## Purpose

The purpose of this user manual is to provide general information to the end users and consultants, about how the **Achieve Alert Management Module** works. The **Achieve Alert Management Module** is a user friendly product that generates alerts via Email, SMS and/or SAP Alerts. This alert can be generated on any transaction performed in SAP.

## Setup:

To configure Achieve Alert Management Module:

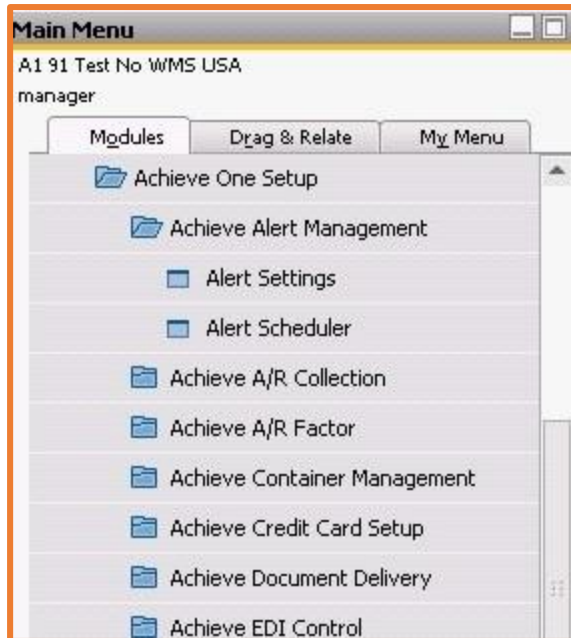
1. Open SAP B1.
2. Select Administration -> Add-Ons -> Add-On Manager from the SAP Business One main menu to display the Add-On Manager screen.
3. Select Achieve One add-on from the Add-Ons list.
4. Click Start to start the Achieve One Add-On.
5. Click OK to close the Add-On Manager screen when the Disconnected changes to Connected in the Status Column of the Add-On Manager screen.



## Achieve Alert Management configuration and Setup

There are two screens which we will use to configure the Alert Management process. These setup screens are found in:

*Administration > Achieve One setup > Achieve Alert Management*



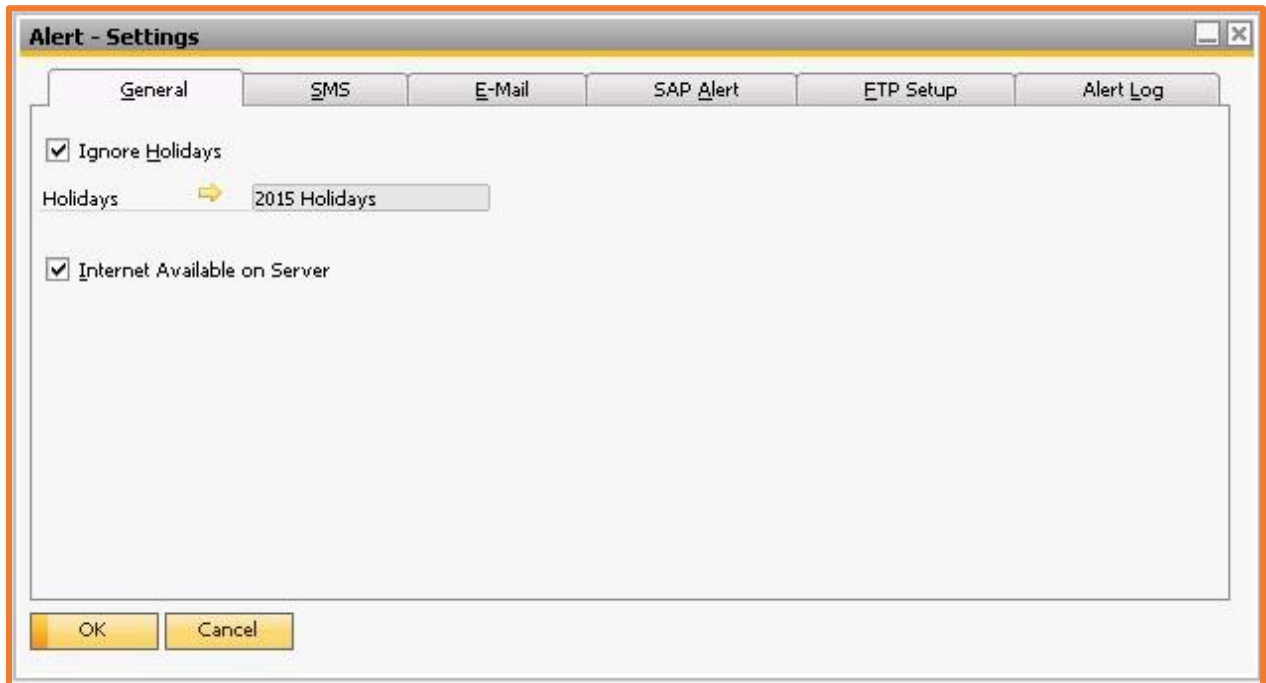
### Alert – Settings

This screen is used to define the system level settings, such as; SMTP details, SMS gateway, FTP, and Alert Log details.

## Defining Alert Settings

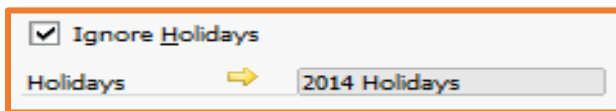
### General Tab

The General Tab helps to setup the “Ignore on Holidays” option and the “Internet Availability on Server” option.

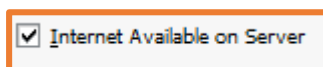


The options available in the General tab are as follows:

- Ignore Holidays: A check box enable functionality to ignore alert execution on holidays. Current fiscal year holiday calendar is auto populated.

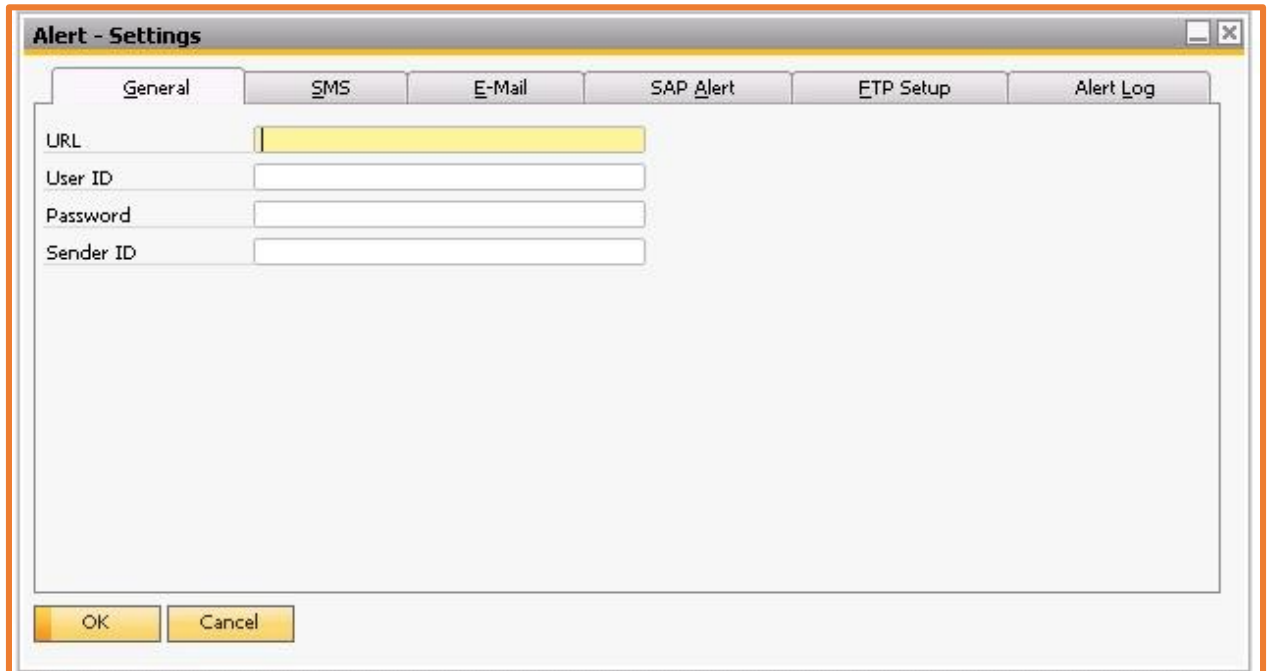


- Internet Available on Server: Enable check box if internet is enabled on server.



## SMS Tab

The SMS Tab helps to setup the SMS gateway details.



The screenshot shows a dialog box titled "Alert - Settings" with a tabbed interface. The "SMS" tab is selected. The dialog contains four input fields: "URL" (highlighted in yellow), "User ID", "Password", and "Sender ID". At the bottom, there are "OK" and "Cancel" buttons.

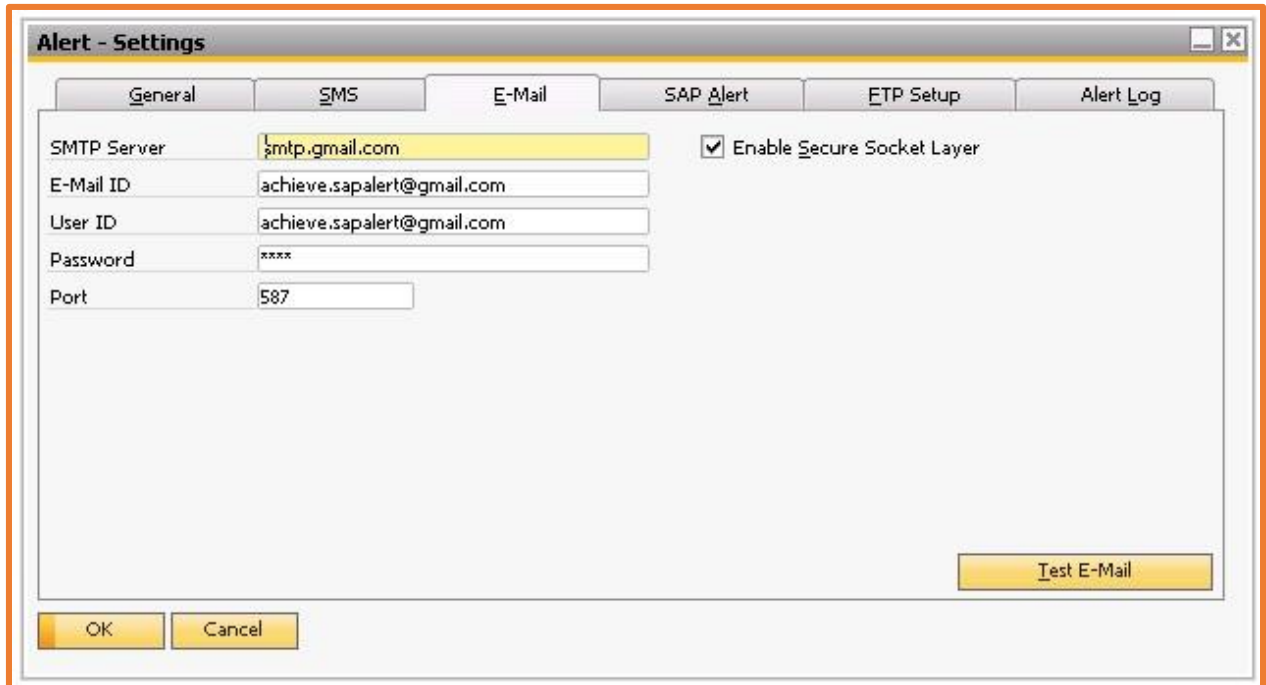
**The Field details on the SMS tab are as follows:**

- URL: Define SMS gateway path or URL.
- User ID: Define SMS gateway user ID.
- Password: Define SMS gateway password.
- Sender ID: Define SMS gateway sender ID.



## E-Mail Tab

The E-Mail Tab helps to setup E-Mail details.



**Alert - Settings**

General    SMS    **E-Mail**    SAP Alert    ETP Setup    Alert Log

SMTP Server:      Enable Secure Socket Layer

E-Mail ID:

User ID:

Password:

Port:

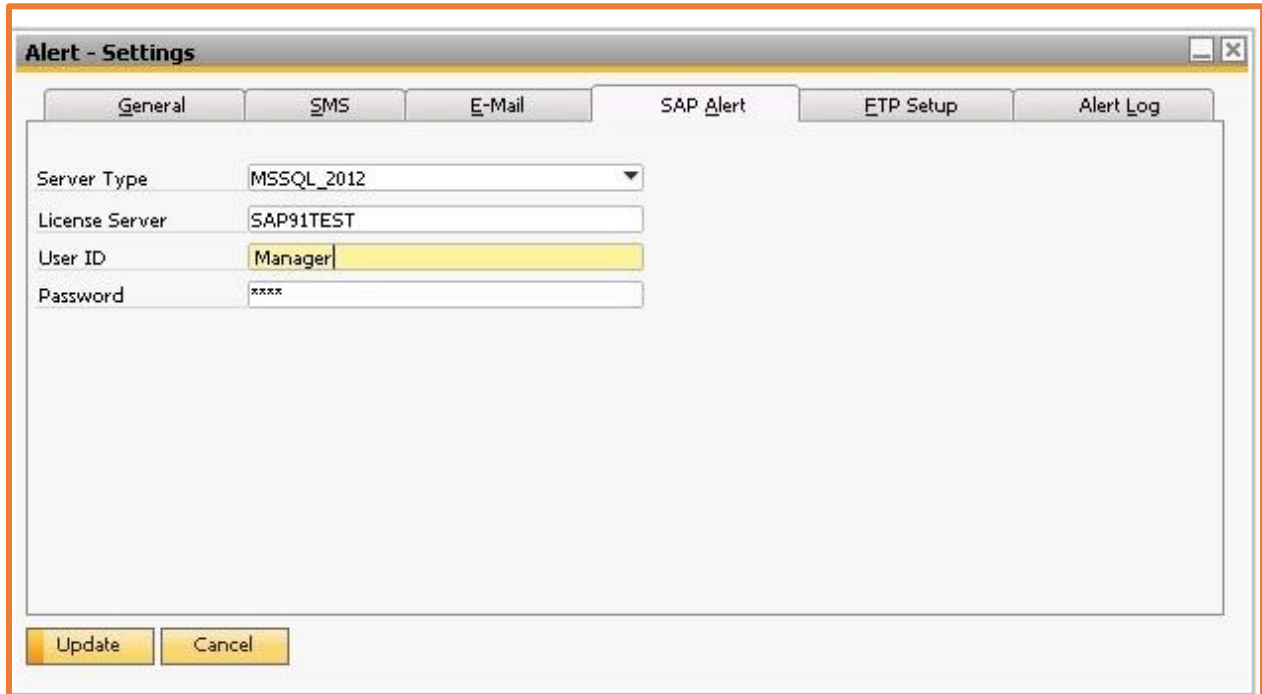
  

**The Field details on E-Mail tab are as follows:**

- URL: Define outgoing mail server (SMTP) URL or name.
- E-Mail ID: Define email account that shall be used as sender email account.
- User ID: Define sender user name.
- Password: Define sender e-mail account (defined in E-Mail ID) password.
- Port: Define outgoing SMTP server port.
- Enable Secure Socket Layer: Enable encrypted connection (SSL) if applicable.
- Test E-Mail: This button is used to check the E mail setting.

## SAP Alert Tab

The Alert Settings Tab helps to setup the SAP Alerts details.



The screenshot shows a window titled "Alert - Settings" with several tabs: "General", "SMS", "E-Mail", "SAP Alert" (which is the active tab), "ETP Setup", and "Alert Log". The "SAP Alert" tab contains the following fields:

- Server Type: MSSQL\_2012 (dropdown menu)
- License Server: SAP91TEST (text field)
- User ID: Manager (text field)
- Password: \*\*\*\* (password field)

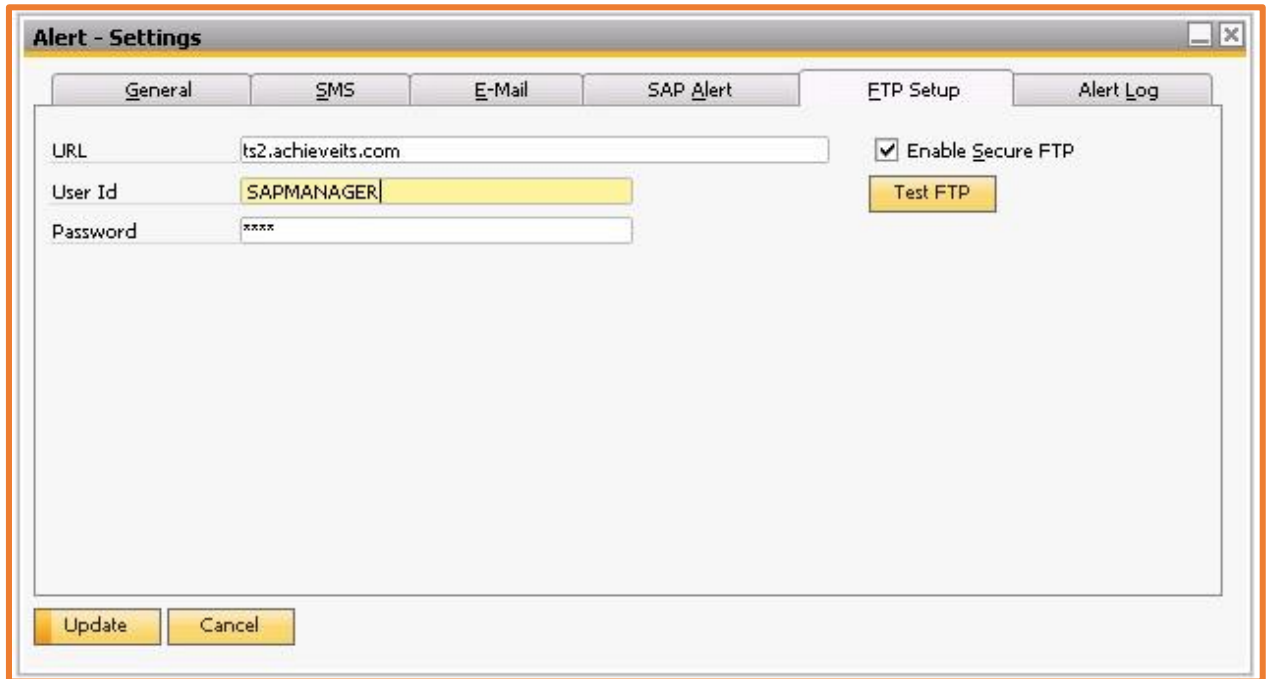
At the bottom of the dialog, there are two buttons: "Update" and "Cancel".

**The Field details on SAP Alert tab are as follows:**

- Server Type: Select SQL version (i.e. MSSQL\_2005, MSSQL\_2008, MSSQL\_2012).
- User ID: Define SAP valid user name.
- Password: Define SAP user password.

## FTP Setup tab

The FTP Setup Tab helps to setup the FTP details.



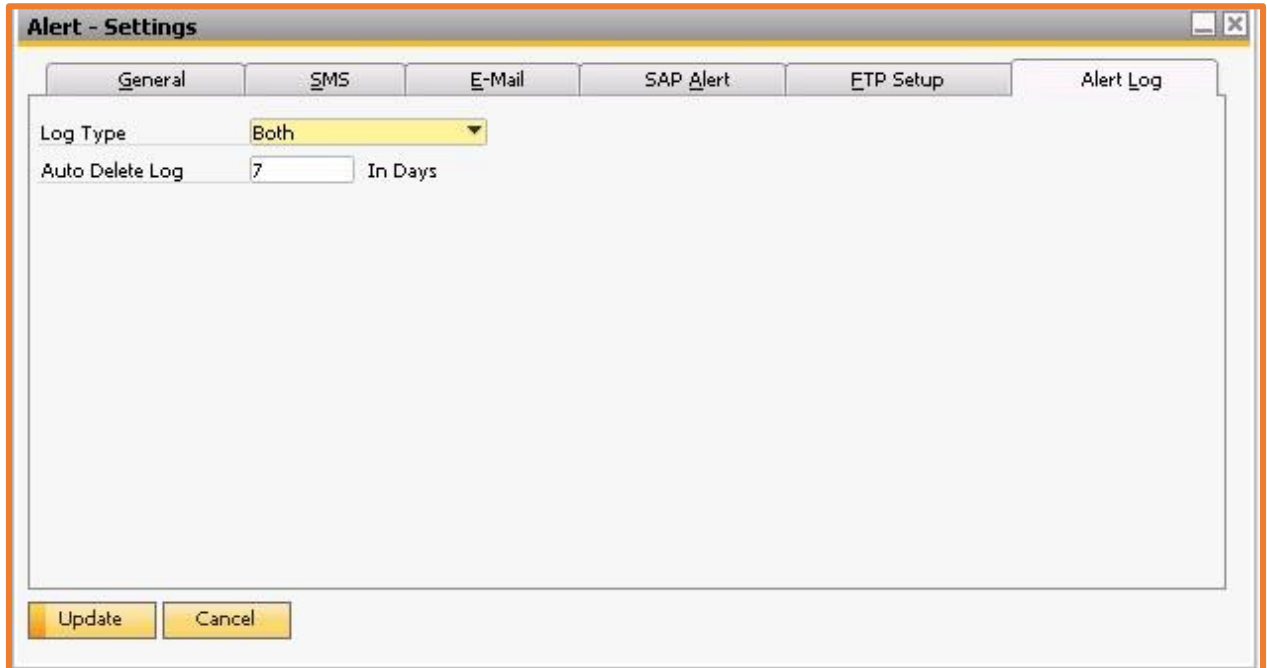
The screenshot shows a dialog box titled "Alert - Settings" with several tabs: General, SMS, E-Mail, SAP Alert, ETP Setup, and Alert Log. The "ETP Setup" tab is active. It contains three text input fields: "URL" with the value "ts2.achieveits.com", "User Id" with the value "SAPMANAGER", and "Password" with the value "\*\*\*\*". To the right of these fields is a checked checkbox labeled "Enable Secure FTP" and a yellow button labeled "Test FTP". At the bottom of the dialog are two yellow buttons: "Update" and "Cancel".

The Field details on FTP Setup tab are as follows:

- URL: Define FTP URL.
- User ID: Define FTP valid user ID.
- Password: Define FTP User password.
- Enable Secure Socket Layer: Enable encrypted connection (SSL) if applicable.
- Test FTP: This button is used to check the FTP setting.

## Alert Log tab

The Alert Log Tab helps to setup the Log details.



The screenshot shows a window titled "Alert - Settings" with several tabs: General, SMS, E-Mail, SAP Alert, ETP Setup, and Alert Log. The "Alert Log" tab is selected. Inside this tab, there is a "Log Type" dropdown menu currently set to "Both". Below it is an "Auto Delete Log" field with the number "7" entered, followed by the text "In Days". At the bottom of the dialog, there are two buttons: "Update" and "Cancel".

**The Field details on Alert Log tab are as follows:**

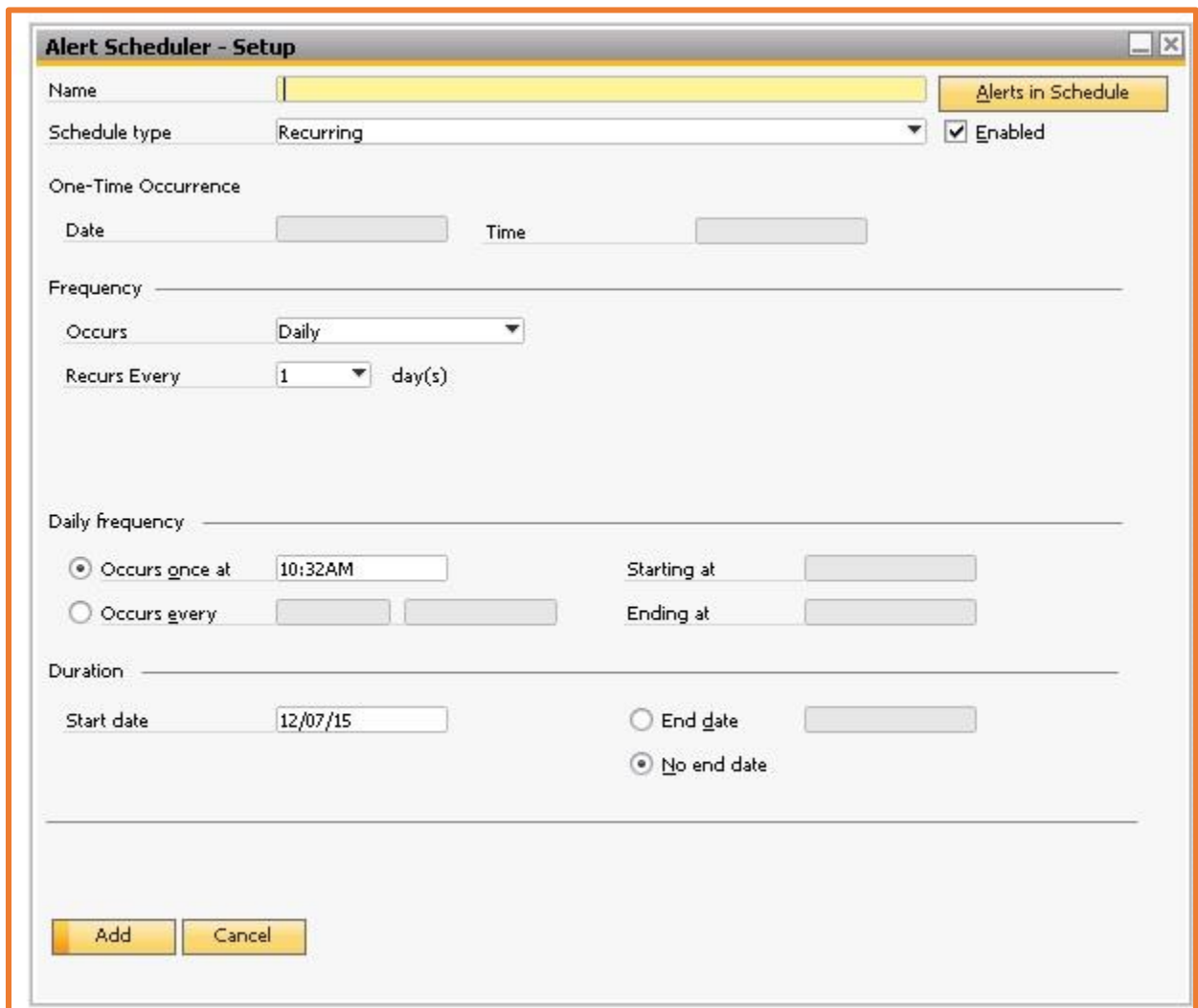
- Log Type: Select Log type (i.e. Success Log, Error Log, Both) which needs to be maintain.
- Auto Delete Log: Define days to keep log.

## Configuring Alert Scheduler:

The Alert scheduler screen is used to define one or more schedules that will automatically execute an Alert based on an event in SAP.

The path to this screen is:

*Administration > Achieve One setup > Achieve Alert Management > Alert Scheduler*



**Alert Scheduler - Setup**

Name

Schedule type   Alerts in Schedule  Enabled

One-Time Occurrence

Date  Time

Frequency

Occurs

Rekurs Every  day(s)

Daily frequency

Occurs once at  Starting at

Occurs every   Ending at

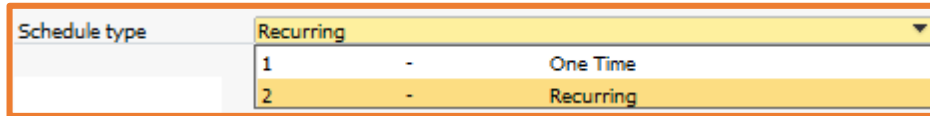
Duration

Start date   End date

No end date

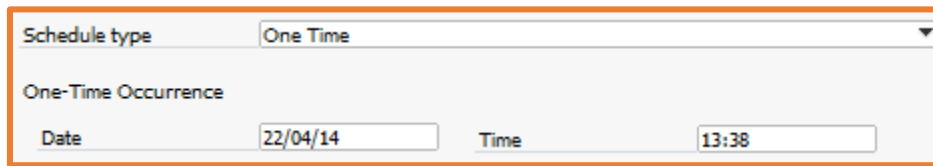
**The Field details on Alert Scheduler are as follows:**

- Name: Define Schedule Name.
- Scheduler Type: There are two types of Schedule Types.

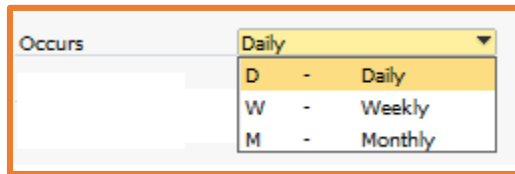


- **One Time:** If an Alert is required to be sent only once then select “One time”.
- **Recurring:** If an Alert is required to be sent on a Daily, Weekly, Monthly or regular interval basis; then select Recurring.

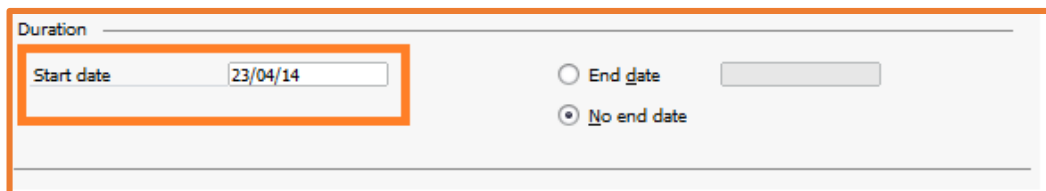
- Enabled: To Enable the schedule.
- **One-Time Occurrence:**



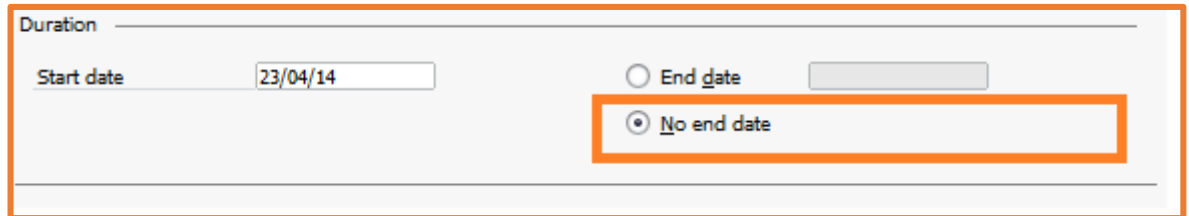
- **Recurring Occurrence:**



- Start Date: Define the date when this scheduled alert will become effective.

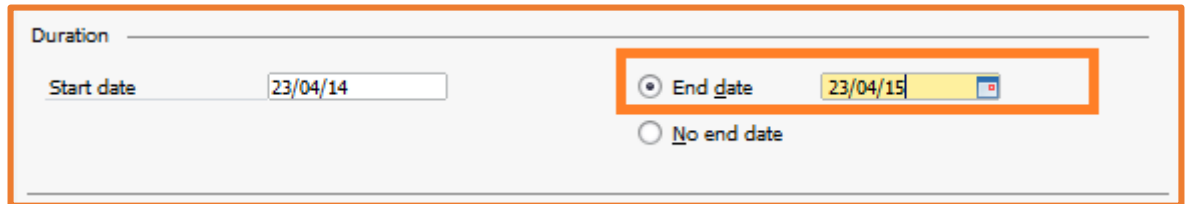


- No End Date: Define if the schedule will remain effective indefinitely.



The screenshot shows a 'Duration' configuration form. On the left, there is a 'Start date' field containing '23/04/14'. On the right, there are two radio button options: 'End date' (which is unselected) and 'No end date' (which is selected and highlighted with an orange box). A date input field is visible next to the 'End date' option but is empty.

- End Date: Define the date when the schedule will no longer be effective

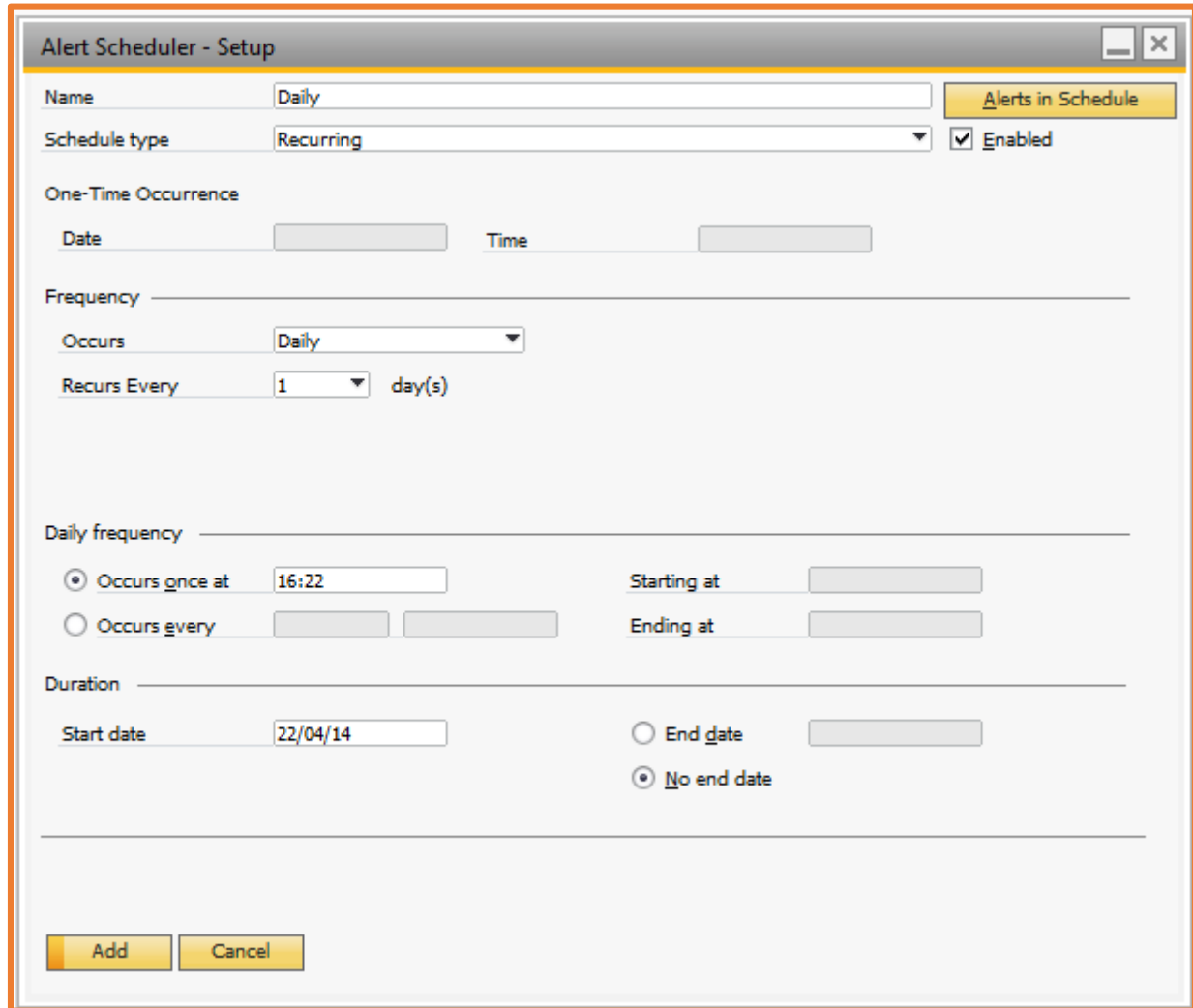


The screenshot shows the same 'Duration' configuration form. The 'Start date' field still contains '23/04/14'. The 'End date' radio button is now selected and highlighted with an orange box, and its corresponding date input field contains '23/04/15'. The 'No end date' radio button is unselected.

### Defining Daily Alert Occurrences:

Daily alerts can be defined as follows:

- Alert occurs once per day/each day: To define the alert scheduler to run once per day, the following settings need to be completed.



**Alert Scheduler - Setup**

Name:

Schedule type:   Enabled

One-Time Occurrence

Date:  Time:

Frequency

Occurs:

Recurs Every:  day(s)

Daily frequency

Occurs once at  Starting at

Occurs every  Ending at

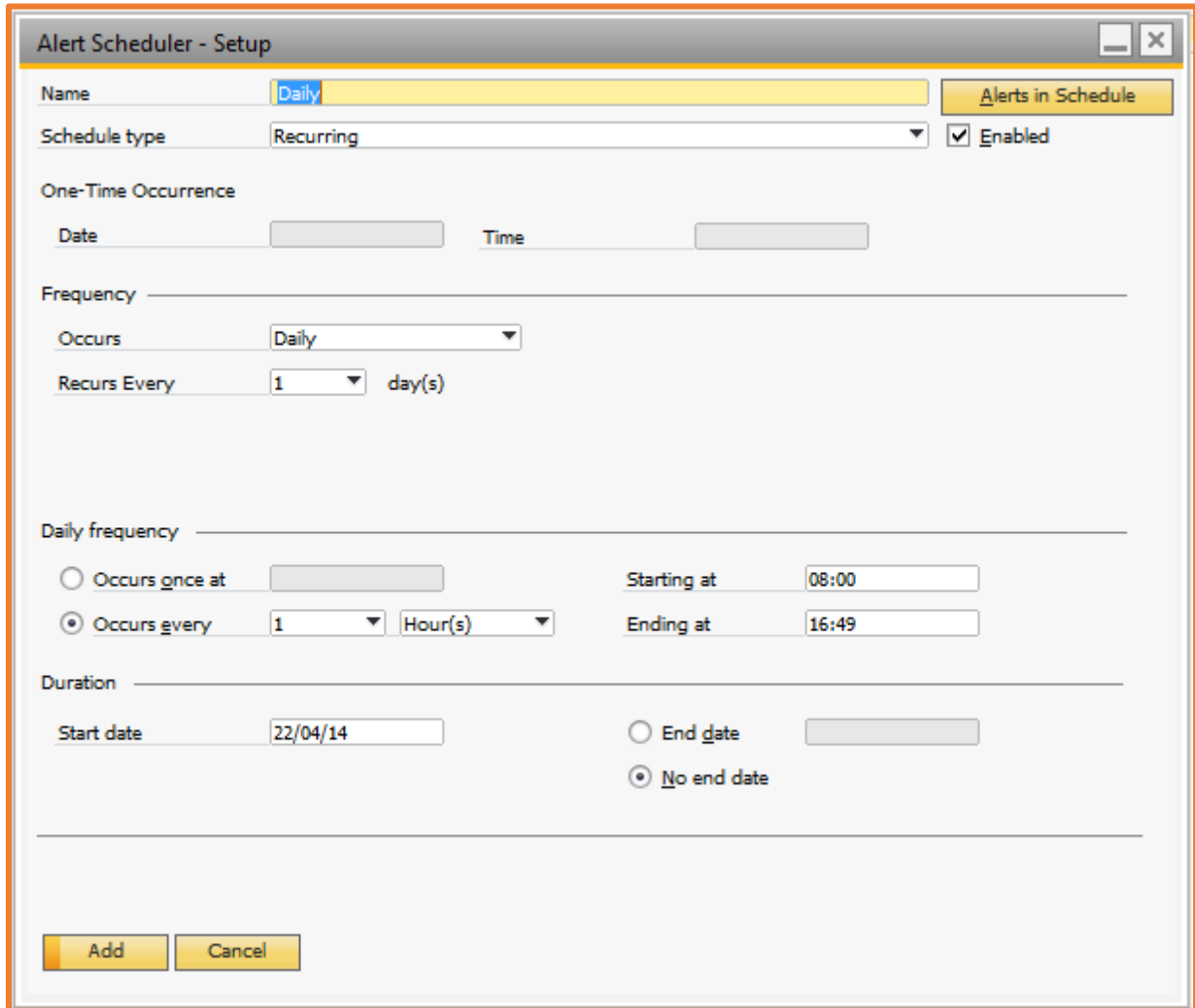
Duration

Start date:   End date

No end date

- Occurs: Select “Daily” in occurs.
- **Recurs Every:** Select “1” in recurs.
- Occurs once at: Define alert execution time.
- I.e. as seen in the screen shot above – The Alert occurs every day at 4:22 PM. Schedule will be used starting April 22, 2014.
- Alert occurs multiple times at regular intervals within a day: To define the daily scheduler which occurs on a regular interval the following settings need to be completed.





**Alert Scheduler - Setup**

Name:  Alerts in Schedule:

Schedule type:  Enabled:

One-Time Occurrence

Date:  Time:

Frequency

Occurs:

Recurs Every:  day(s)

Daily frequency

Occurs once at  Starting at:

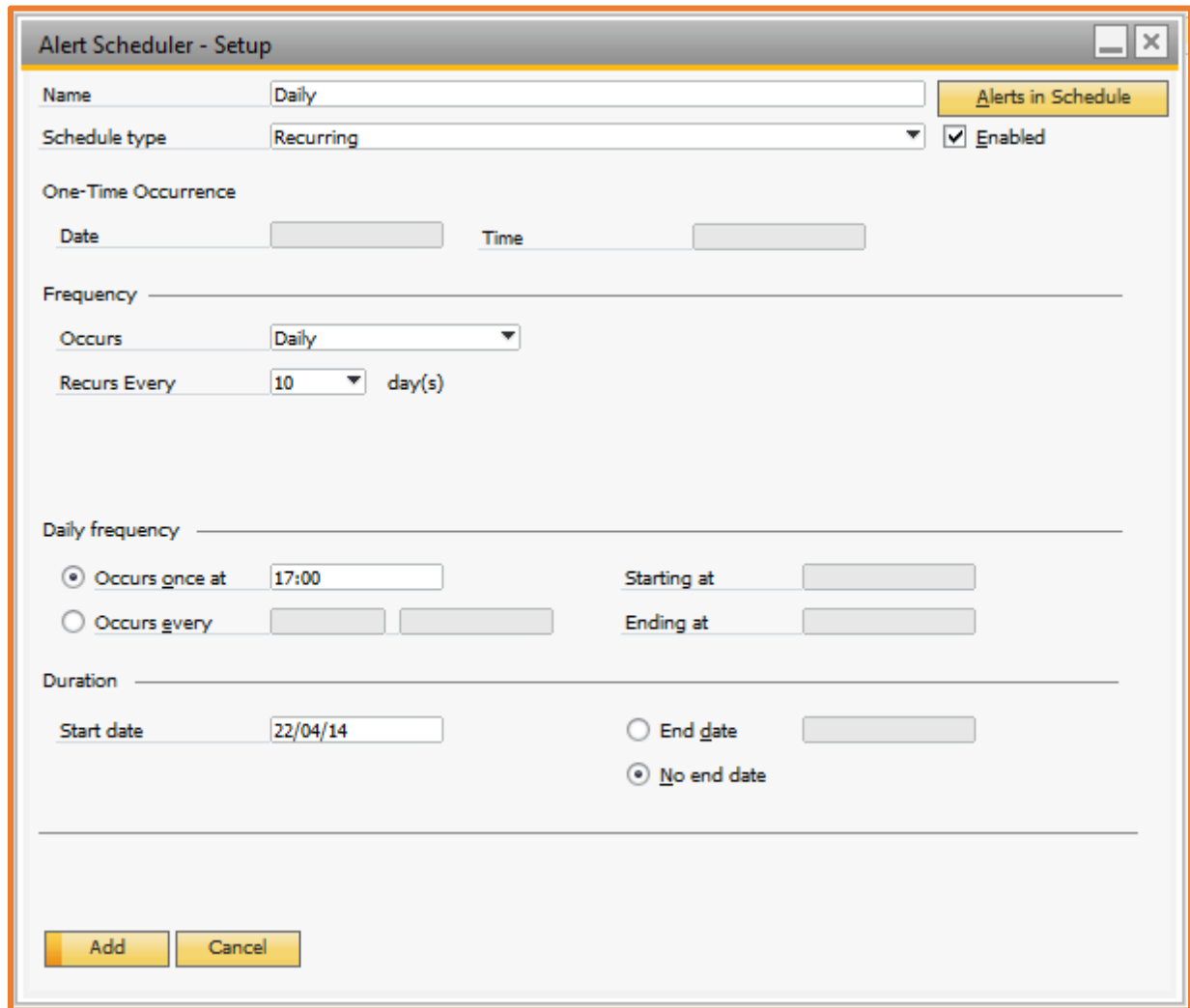
Occurs every   Ending at:

Duration

Start date:   End date:

No end date

- Occurs: Select “Daily” in occurs.
  - Recurs Every: Select “1” in recurs.
  - Occurs Every: Select number and select “Hours” (To define interval in hours), “Minutes” (To define intervals in Minutes), and “Seconds” (To define intervals in seconds).
  - Starting at: Start time of alert.
  - Ending at: End time of alert.
  - I.e. as seen in the screen shot above – The Alert occurs every day, every hour between 8:00 AM and 4:49 PM. Schedule will be used starting on April 22: 2014.
- Alert occurs once per day at an interval: To define scheduler on day’s interval which recurs once the following settings needs to be completed.



**Alert Scheduler - Setup**

Name:

Schedule type:   Enabled

One-Time Occurrence

Date:  Time:

Frequency

Occurs:

Recurs Every:  day(s)

Daily frequency

Occurs once at:  Starting at:

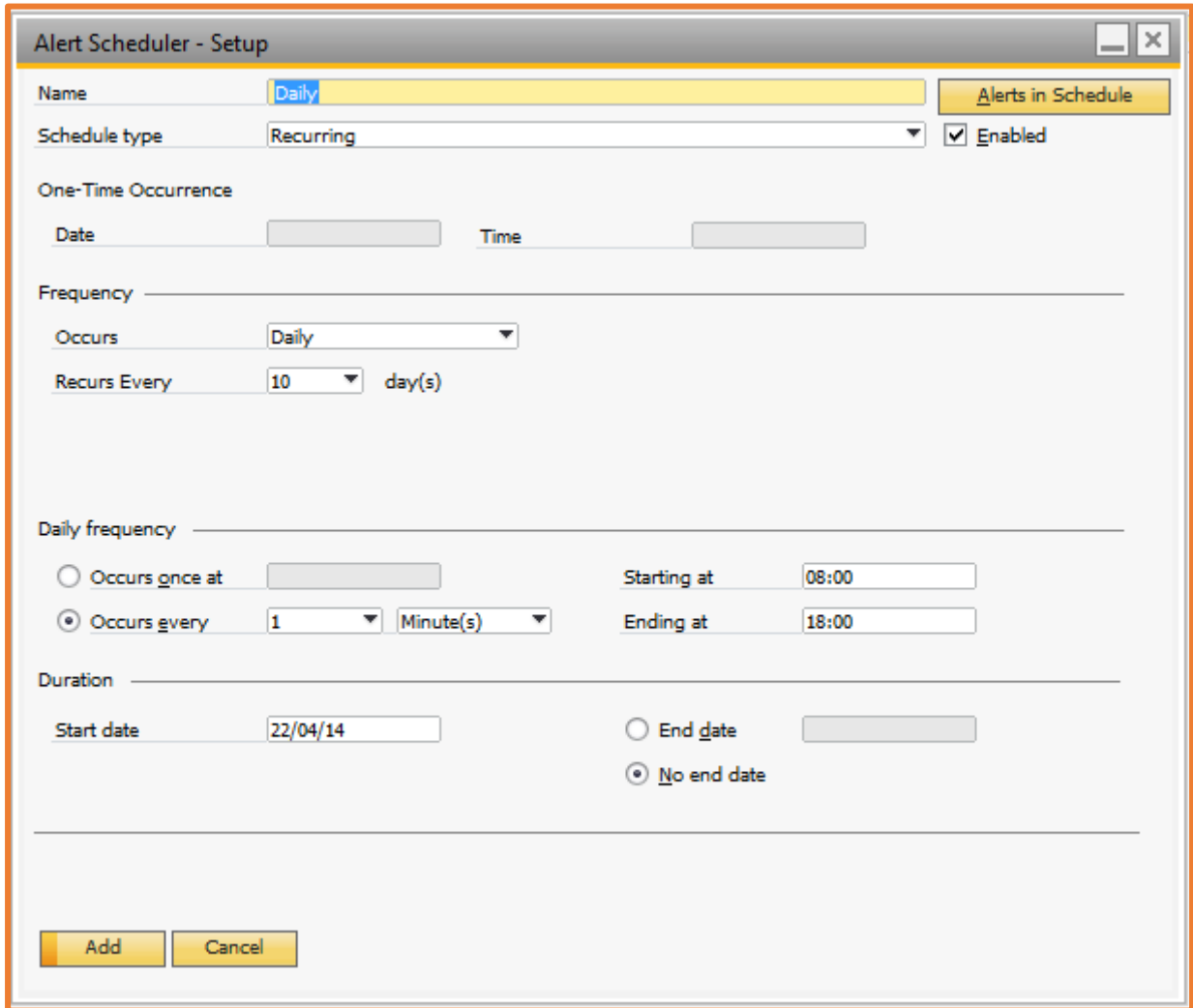
Occurs every:  Ending at:

Duration

Start date:   End date:

No end date

- Occurs: Select “Daily” in occurs.
  - Recurs Every: Select “10” in recurs.
  - Occurs *once* at: Define alert execution time.
  - I.e. as seen in the screen shot above – The Alert Occurs in every 10 days at 5:00 PM. Schedule will be used starting on April 21, 2014.
- Alert occurs multiple times after the regular day interval (s): To define the scheduler on the day’s interval which occurs after regular intervals the following settings need to be completed.



**Alert Scheduler - Setup**

Name:  Alerts in Schedule:  Enabled

Schedule type:   Enabled

One-Time Occurrence

Date:  Time:

Frequency

Occurs:

Recurs Every:  day(s)

Daily frequency

Occurs once at  Starting at

Occurs every  Minute(s) Ending at

Duration

Start date:   End date:

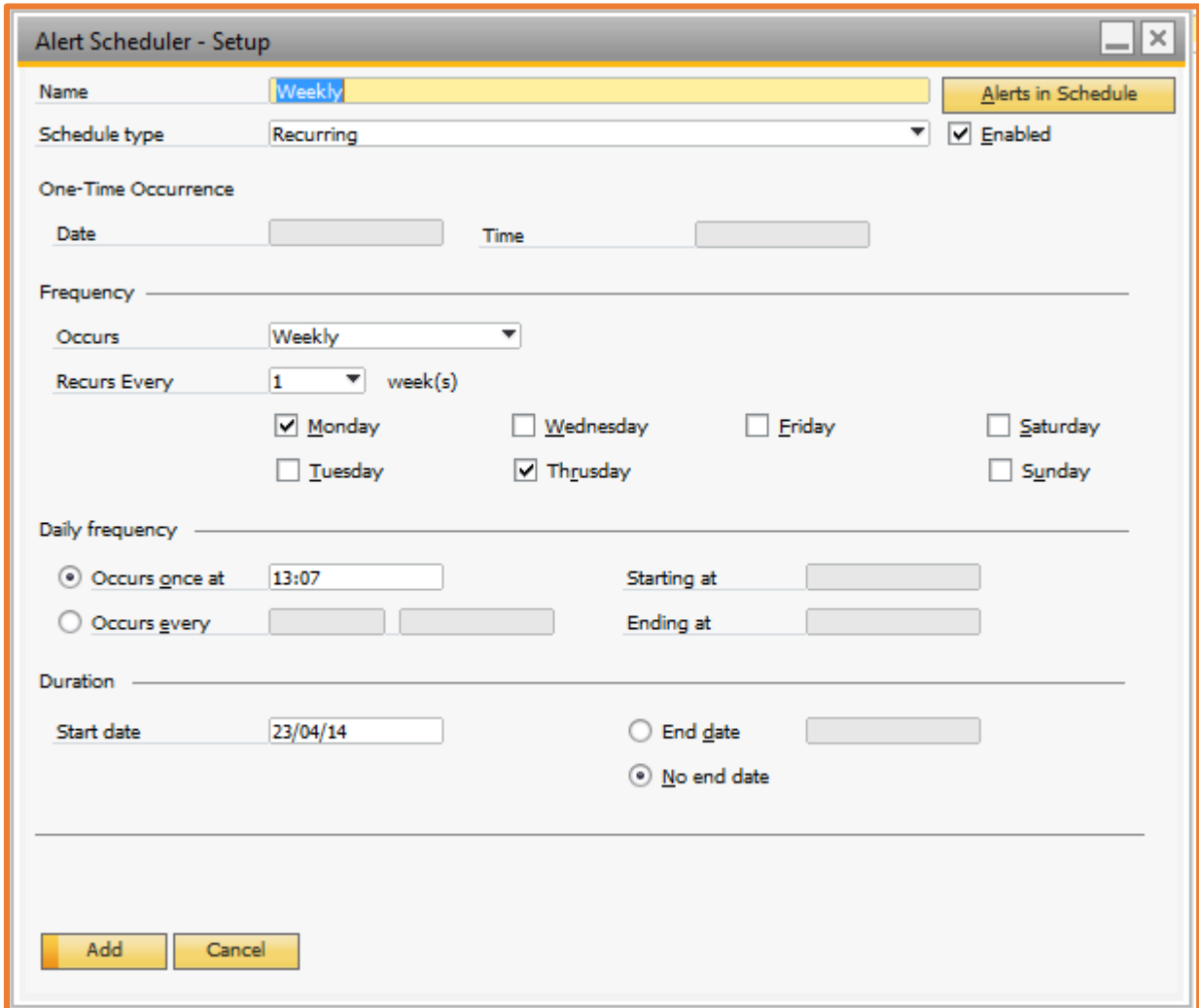
No end date

- Occurs: Select “Daily” in occurs.
- Recurs Every: Select “10” in recurs.
- Occurs Every: Select number and select “Hours” (To define interval in hours), “Minutes” (To define intervals in Minutes), and “Seconds” (To define intervals in seconds).
- Starting at: Start time of alert.
- Ending at: End time of alert.
- I.e. as seen in the screen shot above – The Alert Occurs in every 10 days in every 1 minute between 8:00 AM and 6:00 PM. Schedule will be used starting on April 22, 2014.

## Defining Weekly Scheduler

A Weekly alert can be defined as follows:

- **Weekly Scheduler** occurs once: To define a weekly alert occurrence the following settings need to be completed.



**Alert Scheduler - Setup**

Name:

Schedule type:   Enabled

One-Time Occurrence

Date:  Time:

Frequency

Occurs:

Recurs Every:  week(s)

Monday  Wednesday  Friday  Saturday  
 Tuesday  Thursday  Sunday

Daily frequency

Occurs once at:  Starting at:

Occurs every:  Ending at:

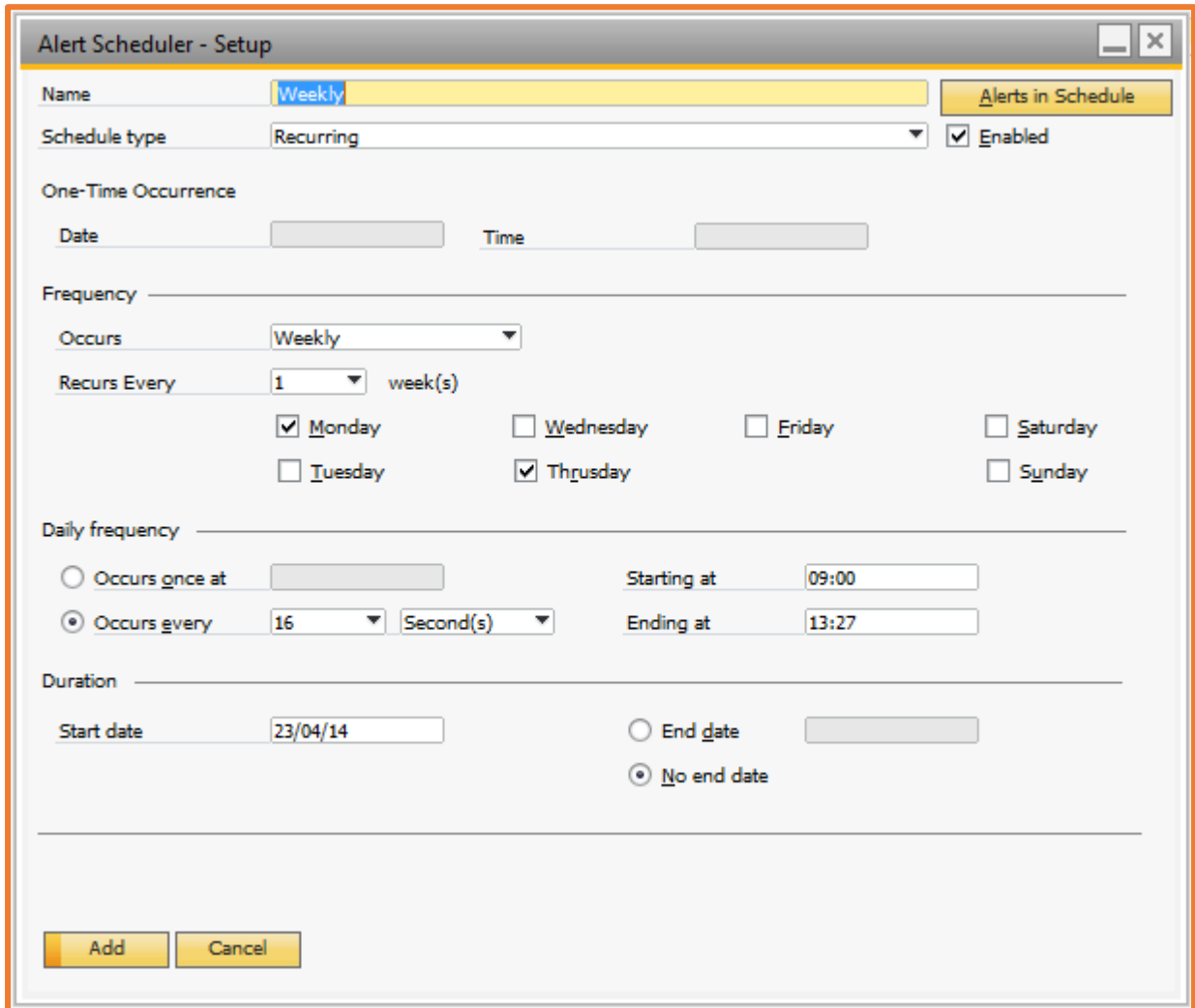
Duration

Start date:   End date:

No end date

- Occurs: Select “Weekly” in occurs.
- Recurs Every: Select “1” in recurs and select week day on which scheduler required to be executed.
- Occurs *once* at: Define alert execution time.

- I.e. as seen in the screen shot above – The Alert occurs every week on Monday, Thursday at 1:07 PM. Schedule will be used starting on April 23, 2014.
- Weekly occurrence occurs multiple times: To define weekly alert scheduler occurs multiple times following setting need to be completed).



**Alert Scheduler - Setup**

Name:

Schedule type:   Enabled

One-Time Occurrence

Date:  Time:

Frequency

Occurs:

Recurs Every:  week(s)

Monday  Wednesday  Friday  Saturday  
 Tuesday  Thursday  Sunday

Daily frequency

Occurs once at  Starting at   
 Occurs every   Ending at

Duration

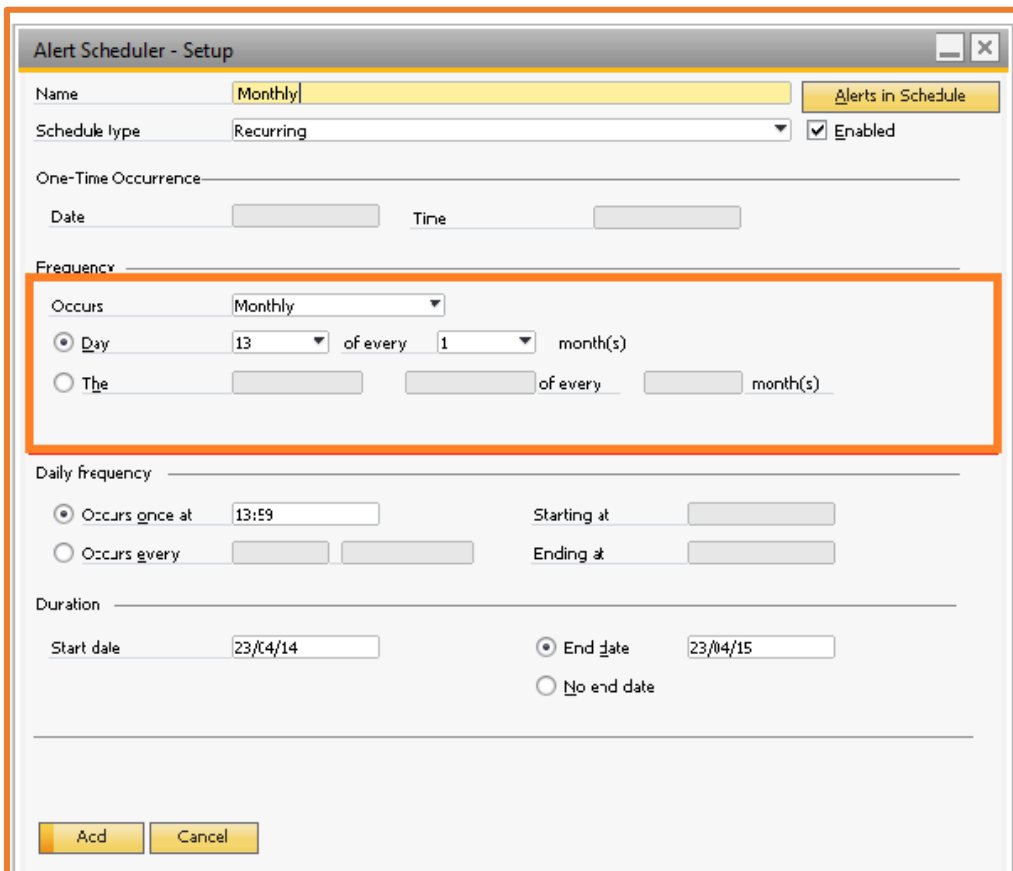
Start date:   End date:   
 No end date

- Occurs: Select “Weekly” in occurs.
- Recurs Every: Select “1” in recurs and select week day on which scheduler required to be executed.

- Occurs Every: Select number and select “Hours” (To define interval in hours), “Minutes” (To define intervals in Minutes), and “Seconds” (To define intervals in seconds).
- Starting at: Start time of alert.
- Ending at: End time of alert.
- I.e. as seen in the screen shot above – The Alert Occurs every week on Monday, Thursday every 16 second(s) between 9:00:00 AM and 1:27:00 PM. Schedule will be used starting on 04/23/14.

## Defining Monthly Scheduler

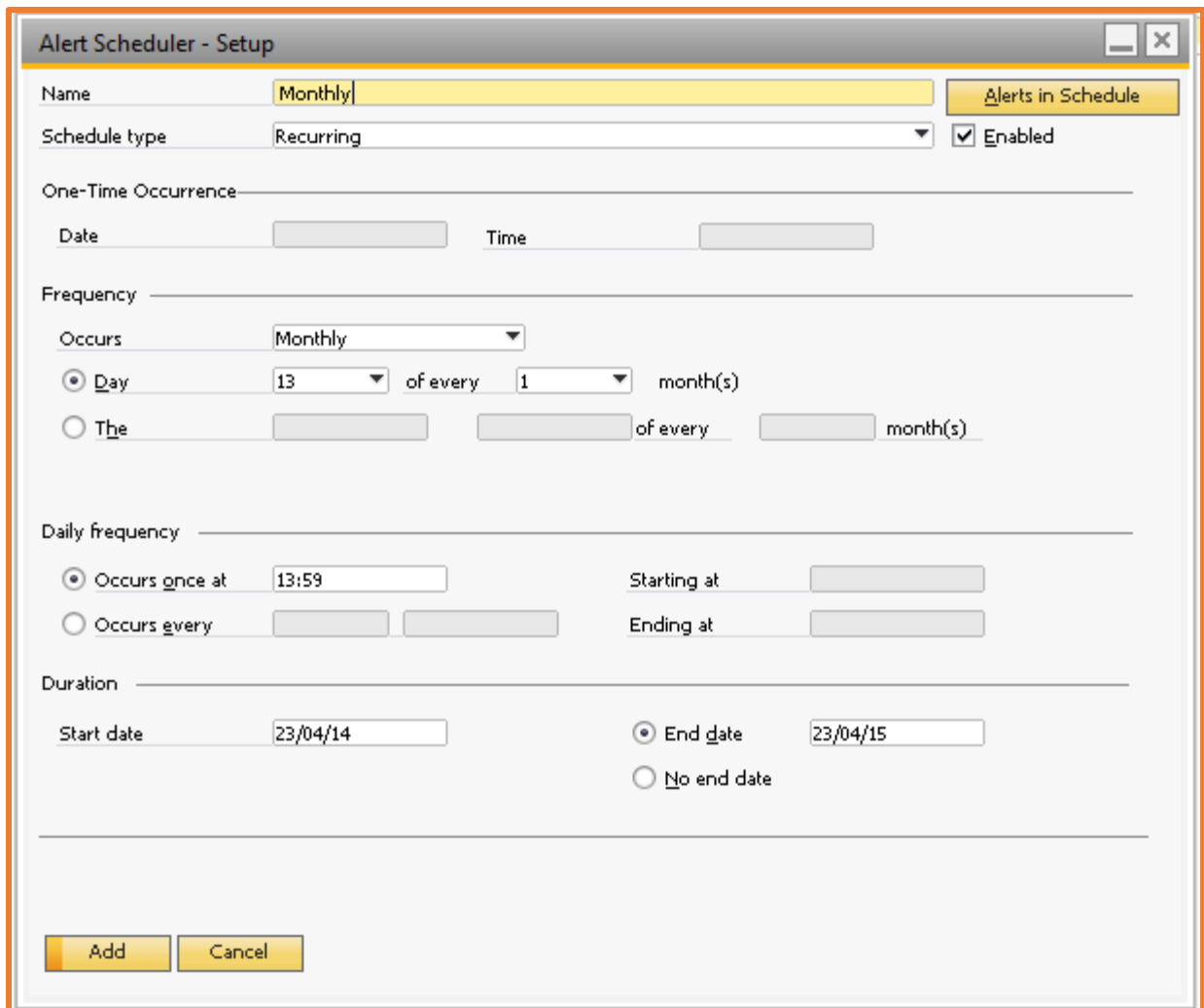
- Monthly occurrences can be defined by selecting “Monthly” in the “occurs” field. Field details can be seen below.



The screenshot shows the 'Alert Scheduler - Setup' dialog box. The 'Name' field contains 'Monthly'. The 'Schedule type' is set to 'Recurring'. The 'Alerts in Schedule' button is highlighted. The 'Occurs' field is set to 'Monthly'. The 'Day' radio button is selected, with '13' in the day field and '1' in the 'of every' field. The 'Start date' is 23/04/14 and the 'End date' is 23/04/15. The 'Alerts in Schedule' button is highlighted.

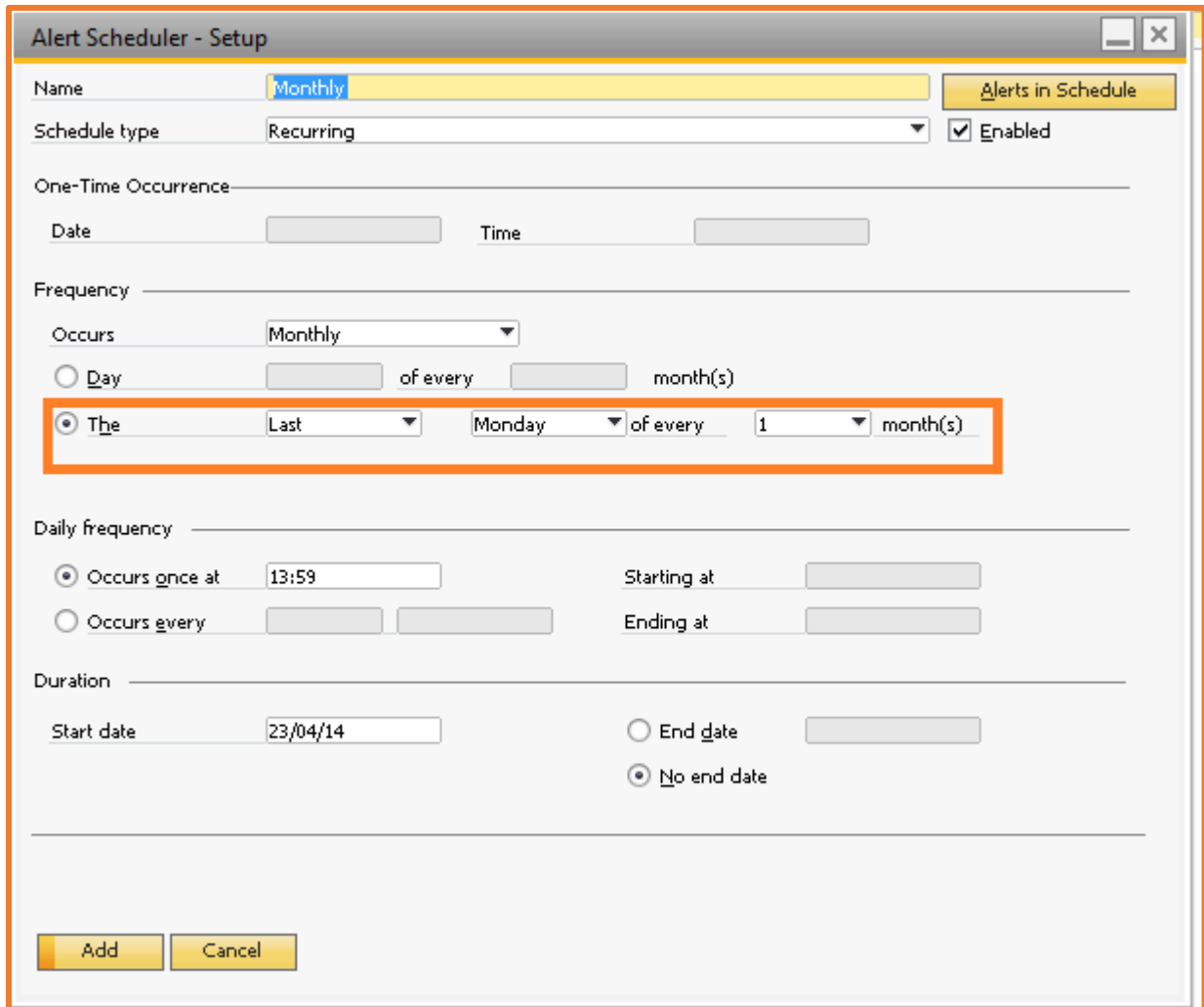
- Day: Select the day of the month the schedule occurs. Only available for monthly recurring schedules.

- Of every: Select the number of months between occurrences of the schedule. Only available for monthly recurring schedules.
- The: Specify a schedule for a specific day of the week on a specific week within the month. Only available for monthly recurring schedules.
- **Defining a Monthly Occurrence once:** To define a monthly alert to occur once the following setting need to be completed.



- Occurs: Select “Monthly” in occurs.
- Day: Select “13” in Day to execute alert scheduler on 13<sup>th</sup> day of the month.
- Of Every: Select “1” to execute alert scheduler every month. If you select “2” then scheduler will be executed in every two months. So select “Of every” accordingly.

- I.e. as seen in the screen shot above – The Alert Occurs every month on day 13 at 1:59:00 PM. Schedule will be used starting on 04/23/14.
- Defining a Monthly occurrence on the Last Monday of every month: To define the monthly alert to occur on last the Monday of every month the following settings need to be completed.



**Alert Scheduler - Setup**

Name: Monthly Alerts in Schedule

Schedule type: Recurring Enabled

One-Time Occurrence

Date: Time:

Frequency

Occurs: Monthly

Day of every month(s)

The Last Monday of every 1 month(s)

Daily frequency

Occurs once at 13:59 Starting at

Occurs every Ending at

Duration

Start date: 23/04/14  End date

No end date

Add Cancel

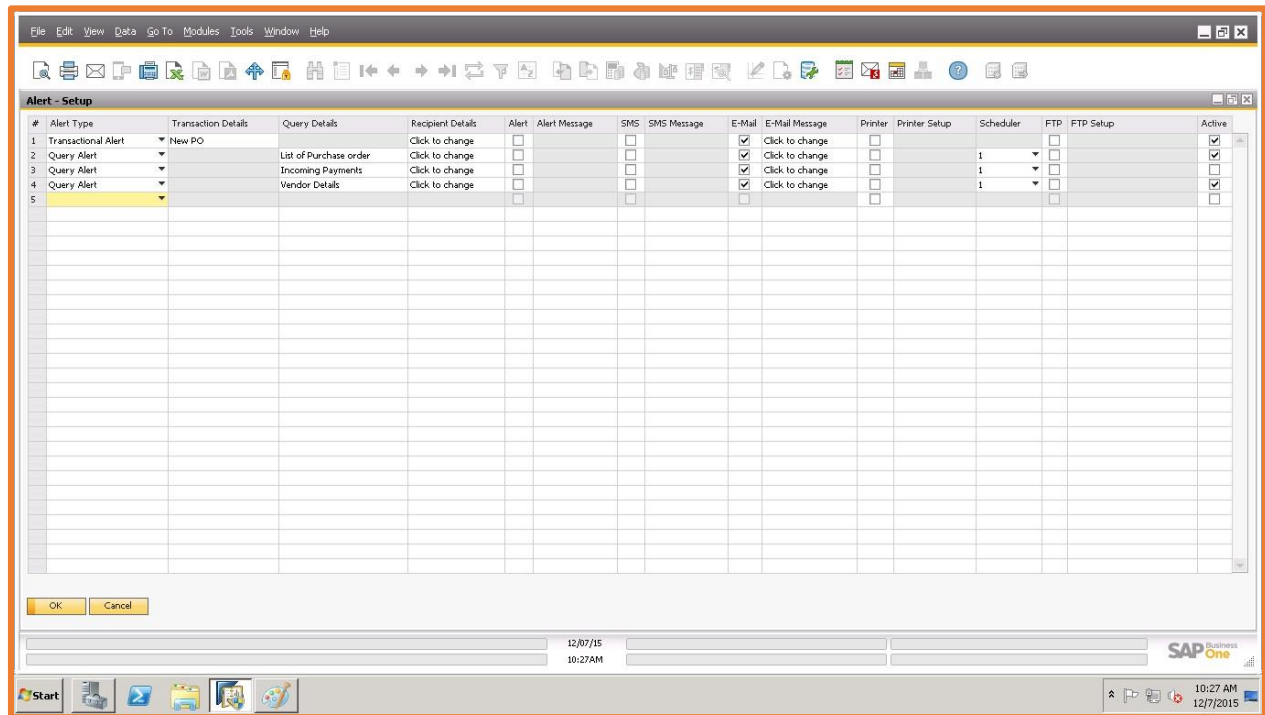
- Occurs: Select “Monthly” in occurs.
- The: Select “Last” to define the day of week.
- Of every: Select “Monday” to execute scheduler on Monday.
- Month(s): Select “1” to execute scheduler every month.



## Alert Setup

The Alert setup screen is the main screen to configure Alerts, either by Transactions or Query's.

Path of this screen: *Achieve one > Achieve Alert management > Alert setup*



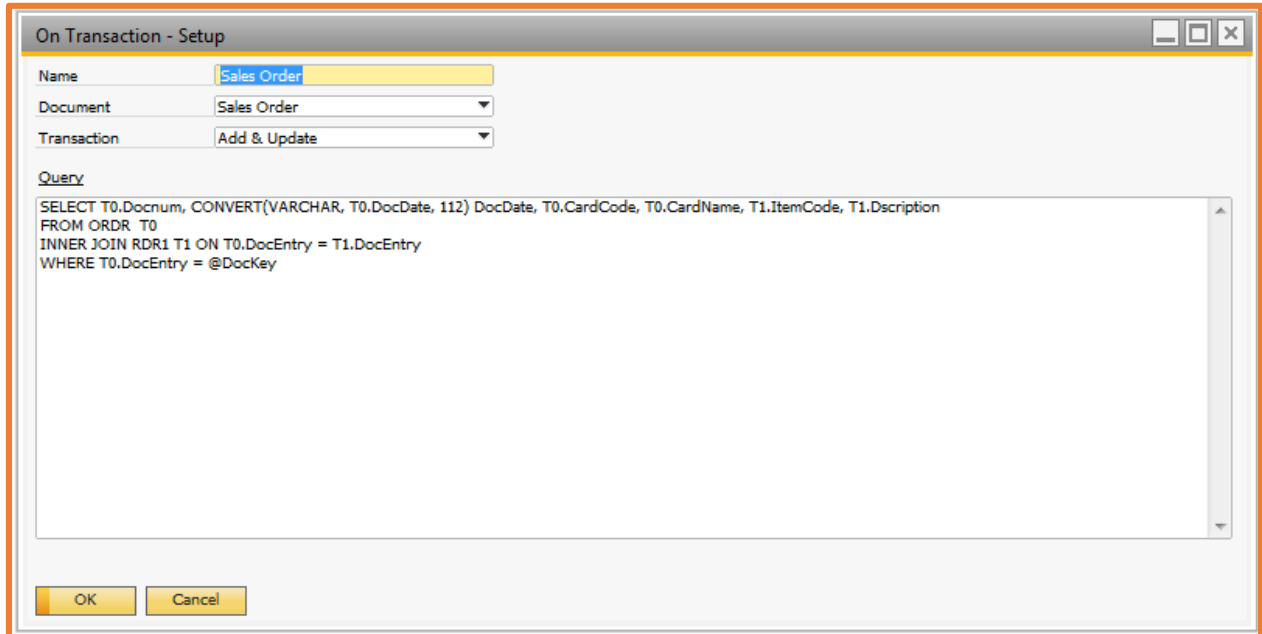
## Select Alert Type

There are two types of Alerts:

- *On Transaction:* Select “On Transaction”, if the Alert is required on the addition, updating, cancellation and/or closing of document (this is transactional).
- *On Query:* Select “Query”, if scheduled alert is required utilizing a Query.

## Transaction Details

If “On Transaction” is selected in the “Alert Type” then click on the “Transaction details” column. This area will allow you to define the document and query to be used in the “On Transaction - Setup”.



**On Transaction - Setup**

Name: Sales Order

Document: Sales Order

Transaction: Add & Update

**Query**

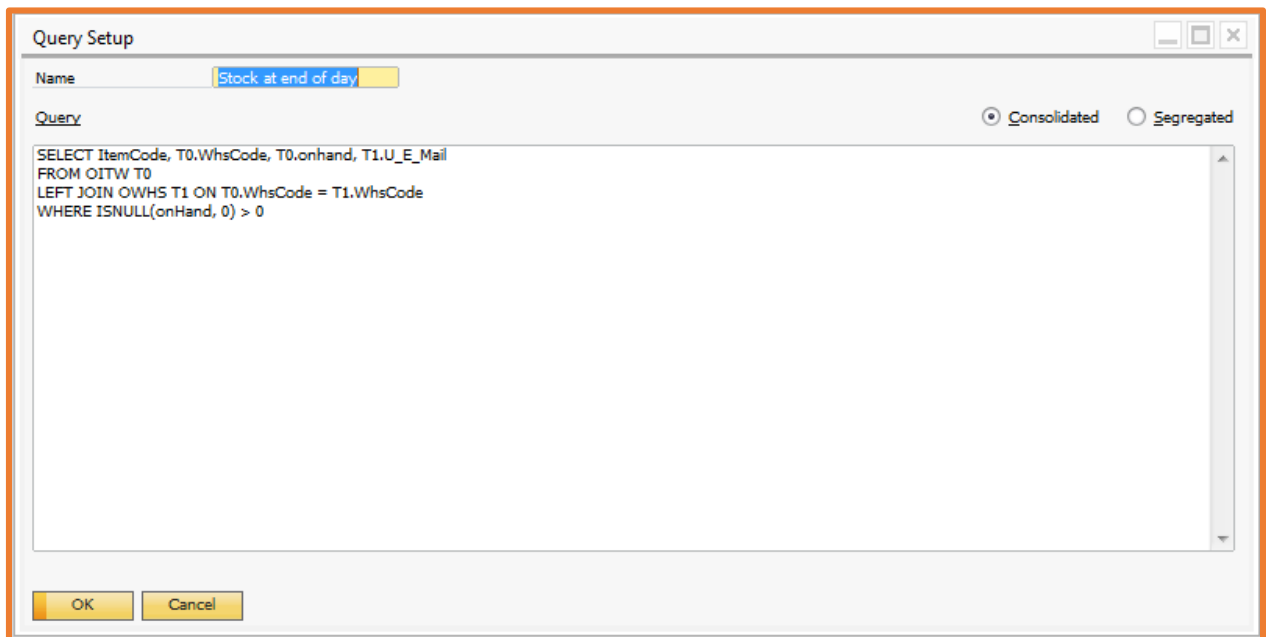
```
SELECT T0.Docnum, CONVERT(VARCHAR, T0.DocDate, 112) DocDate, T0.CardCode, T0.CardName, T1.ItemCode, T1.Dscription
FROM ORDR T0
INNER JOIN RDR1 T1 ON T0.DocEntry = T1.DocEntry
WHERE T0.DocEntry = @DocKey
```

OK Cancel

- Field details of the “On Transaction” window are mentioned below:
  - Name: Define Alert Name.
  - Document: Select document on which alert required to configure.
  - Transaction: Select transaction on which alert is required (i.e. Add, Update, Add & Update, Delete, Cancel, and Close).
  - Query: Define query to pick the fields required in alert message or in attachment. Check **@DocKey** variable with column that represent the object key (Doc Entry column is checked against @DocKey).

## Query Details

If “Query” is selected in the “Alert Type” then click on the “Query details”. Define the alert name and query in the “Query - Setup” window.



Query Setup

Name:

Query:  Consolidated  Segregated

```
SELECT ItemCode, T0.WhsCode, T0.onhand, T1.U_E_Mail
FROM OITW T0
LEFT JOIN OWHS T1 ON T0.WhsCode = T1.WhsCode
WHERE ISNULL(onHand, 0) > 0
```

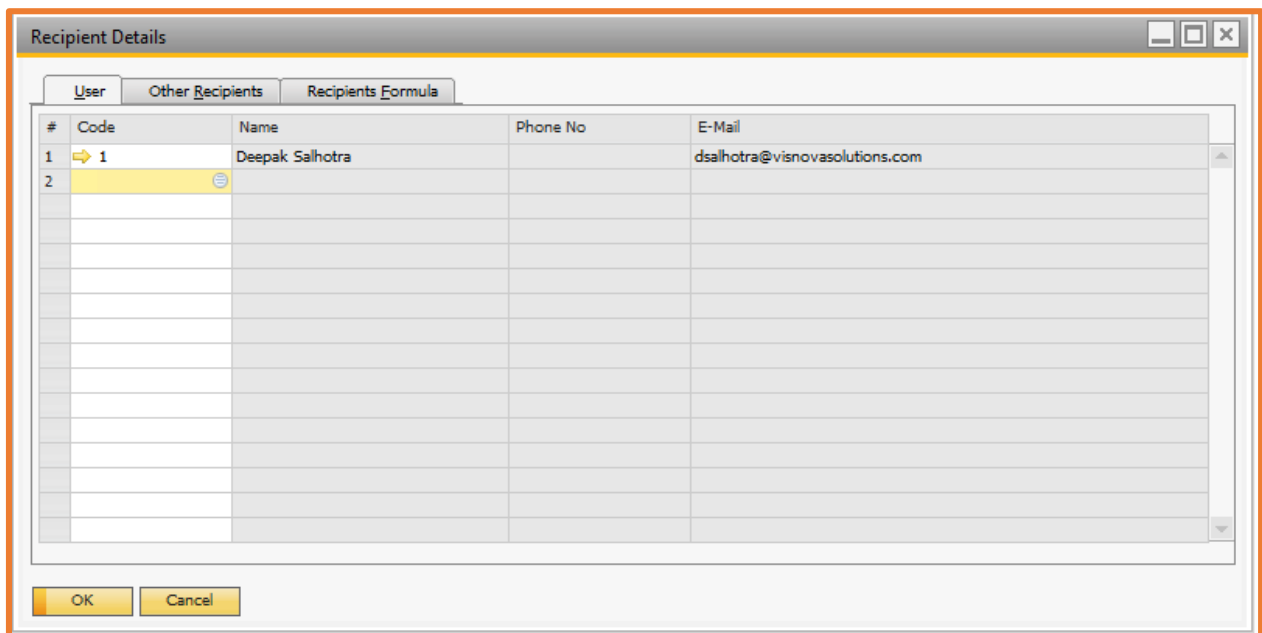
OK Cancel

- Field details of “Query Setup” window are mentioned below:
  - Name: Define Alert Name.
  - Query: Define query to pick the fields required in alert message or in attachment.
  - Consolidated: Define Consolidated, if all records return by query needs to be send to all the recipients.
  - Segregated: Define Segregated, if records return by query needs to be send to the corresponding recipients only.

## Recipient Details:

Click on the “Recipients Details” to define the alert recipient(s), a window will open. A recipient can be an SAP User, a Business Partner, a Sales Employee, a Contact Person, or an Employee. The recipient can be any E-mail ID or mobile number mapped in any field in the database, the recipient can defined on a formula basis.

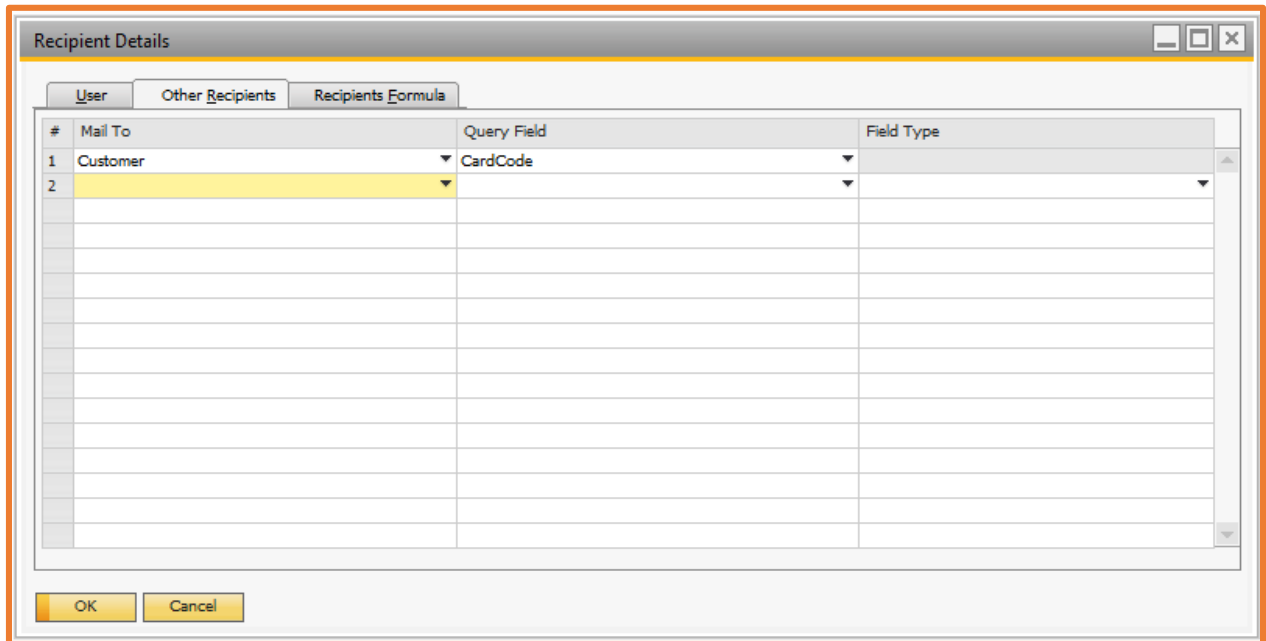
- **User:** If an alert is required to be sent to an SAP user then define this user under “User Tab” of the “Recipients Details” window.



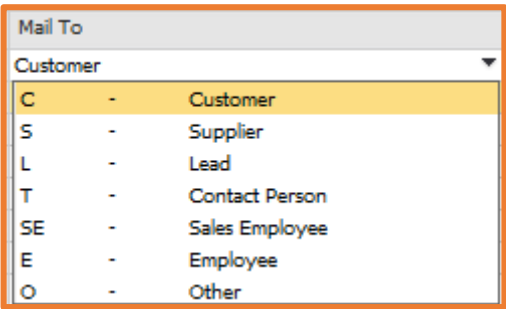
#	Code	Name	Phone No	E-Mail
1	1	Deepak Salhotra		dsalhotra@visnovasolutions.com
2				

- Field details are mentioned below:
  - Code: Define SAP user to whom alert required to send.
  - Name: SAP user name will be automatically populated from “Users - Setup”.
  - Phone No: SAP user mobile no will be automatically populated from “Users - Setup”.
  - E-Mail: SAP user e-mail will be automatically populated from “Users - Setup”.
  - *Other Recipients:* If alert recipient is other than “SAP User” then define recipient under “Other Recipients” tab of “Recipients Details”.

- **Other:** If an alert is required to be sent to another recipient, other than an SAP User then define this user under “Other Tab” of the “Recipients Details” window.

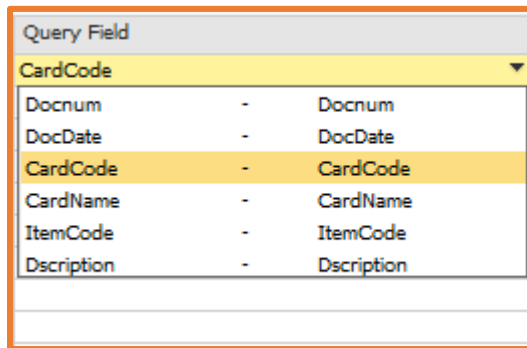


- Field details are mentioned below:
  - Mail To: Select the recipient whom the alert is required to be sent. Options available in the “Mail To” column are listed below.

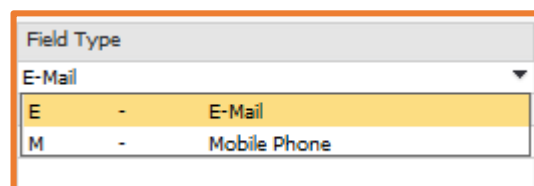
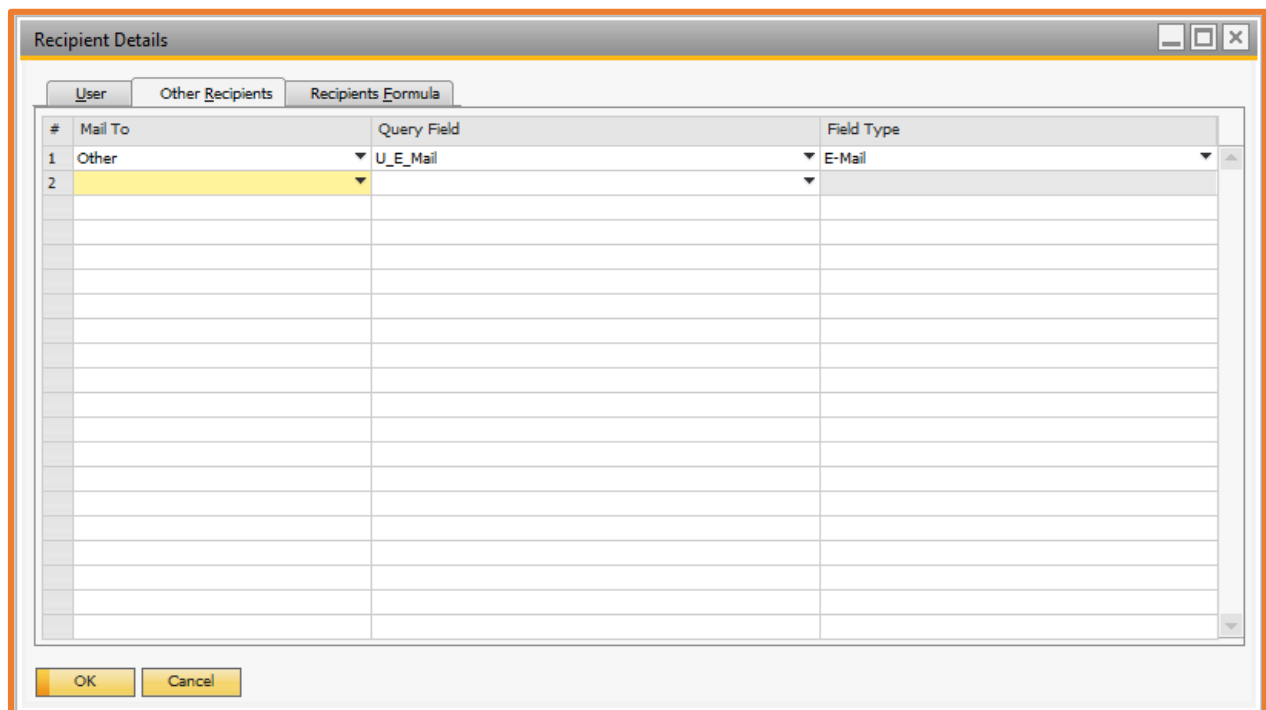


**Note:** Select “Other”, if recipients “E-mail” or “Mobile” is not captured in standard SAP field.

- Query Field: All the query fields are listing in this column. Select query field in which is having recipient’s contact.



- Field Type: If “Other” is selected in “Mail To” column then “Field Type” will be enabled and select type of recipient information (i.e. Mobile, E-Mail) in “Field Type” column.



- *Recipients Formula*: if an alert recipient is required to be defined on a conditional basis then define this recipient under the “Recipients Formula Tab” of the “Recipients Details” window.

Recipient Details

User Other Recipients Recipients Formula

ALL  
 Conditions

Query field: onhand

#	Operation	Value	Mail To
1	>=	10	Contact Person
2	>	10	Customer
3			

Update Cancel

Operation

>=

1	-	=
2	-	>
3	-	<
4	-	<>
5	-	>=
6	-	<=

Mail To

Contact Person

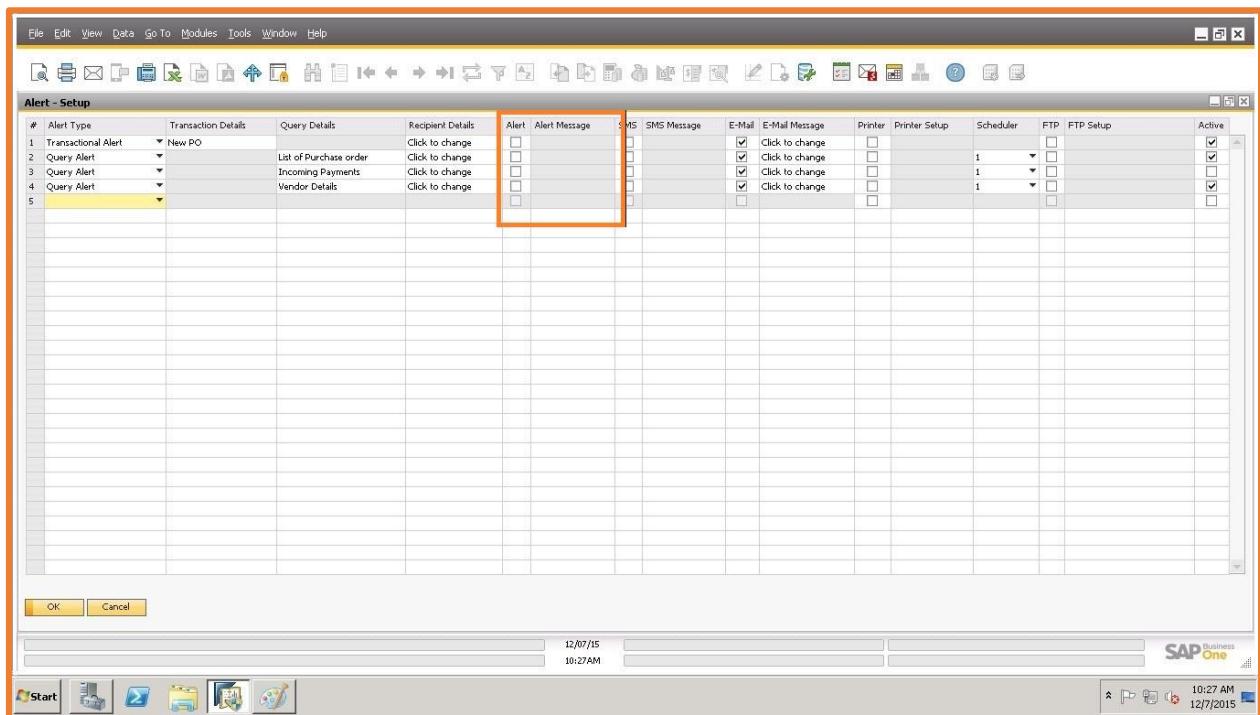
C	-	Customer
S	-	Supplier
L	-	Lead
T	-	Contact Person
SE	-	Sales Employee
E	-	Employee

**Field details are mentioned below:**

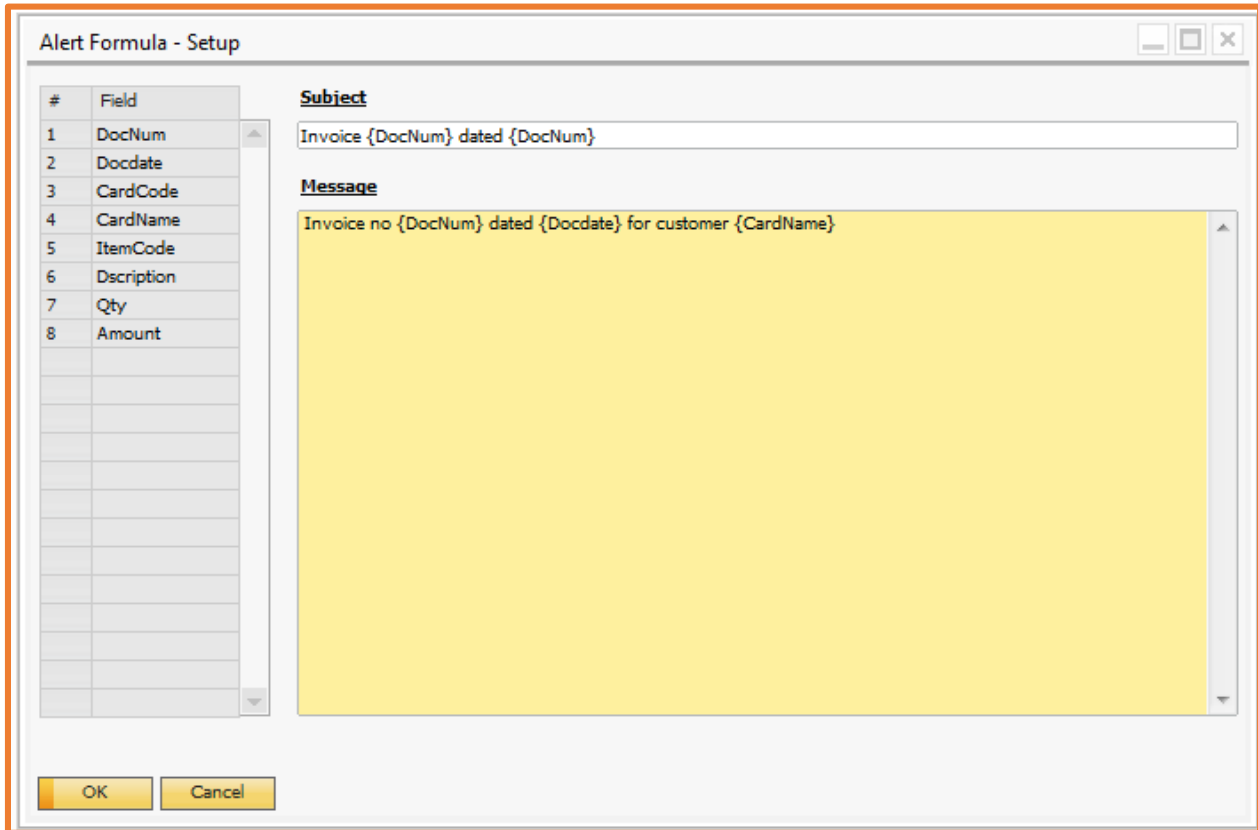
- All: If alert recipient is not required to define on formula basis then select “All” .
- Condition: If alert recipient is required to define on formula basis then select “Conditions”.
- Query Field: All the query fields are listed in this column. Select column query field on which recipient required to be filter.
- Operation: Select operation required against selected query field.
- Value: Define value required to validate against selected query field.
- Mail To: Select recipient whom alert required to send.

**Configuring SAP Internal Alert**

- To configure the SAP Internal Alert, select “Alert” column check box.
- After selecting “Alert” check box, “Alert Message” column will be enabled then click on “Alert Message” column to open “Alert Formula – Setup” window and define “Internal SAP Alert” details.





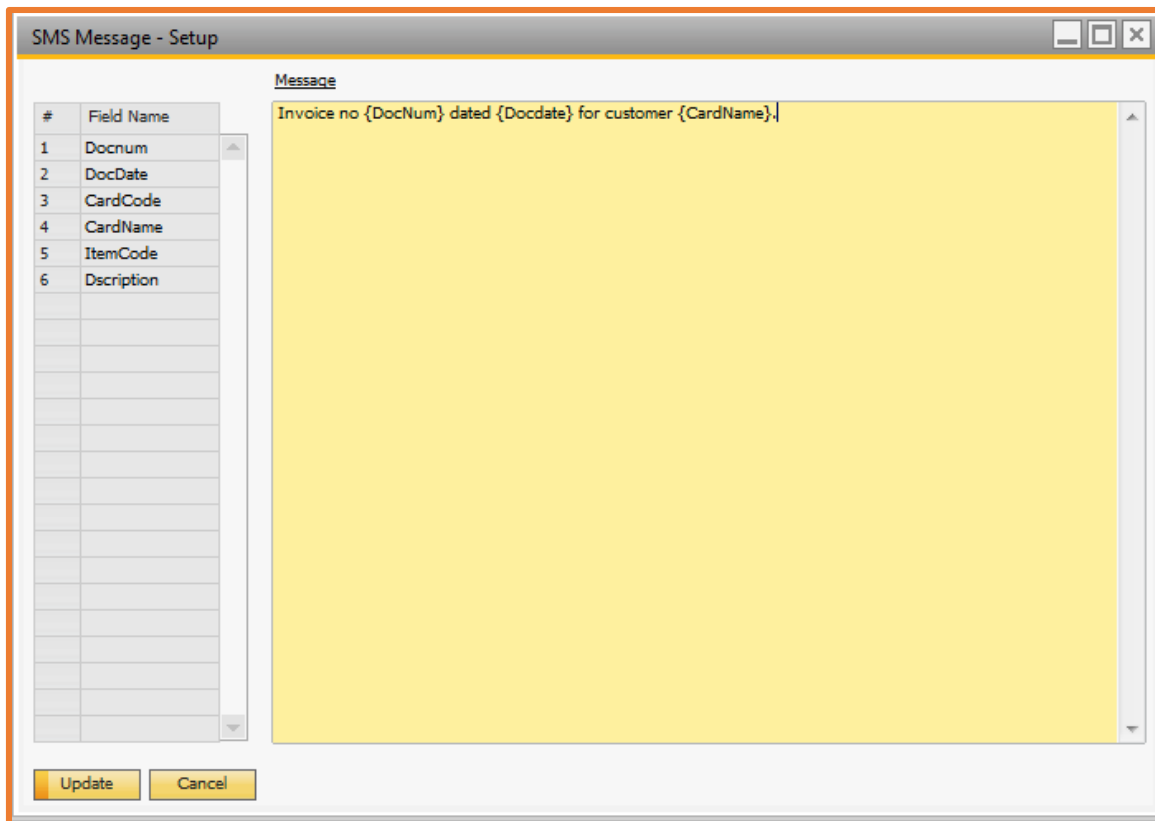
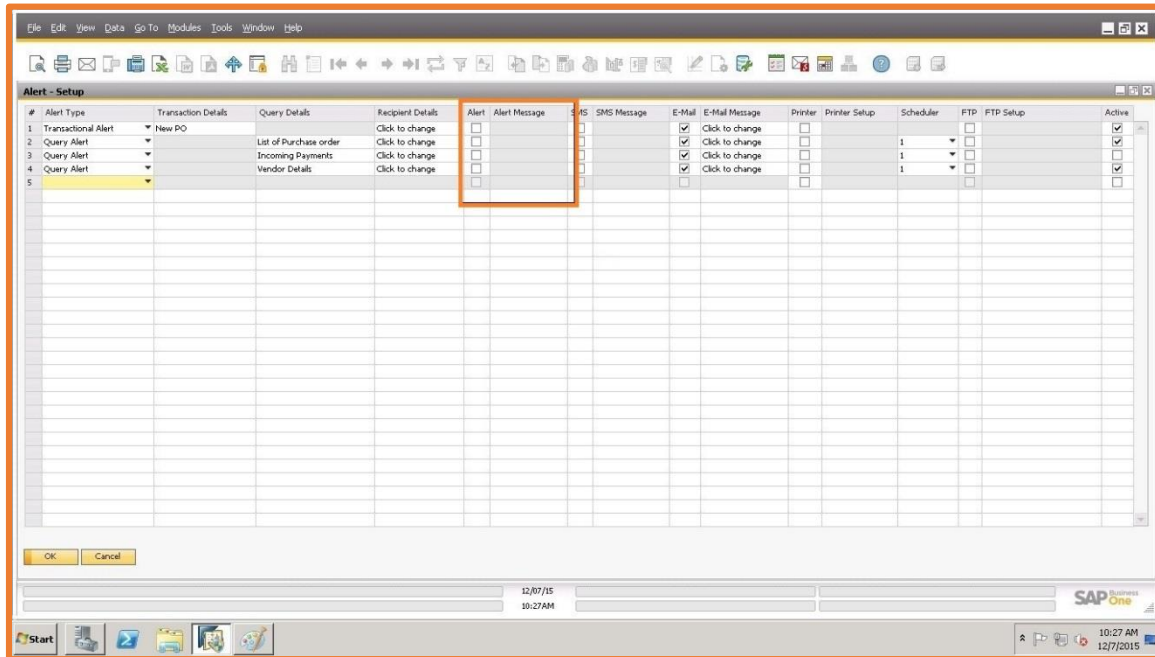


**Field details are mentioned below:**

- Field: The entire query fields are listing under it. If dynamic data is required in alert subject or message then double click the query field, field will be automatically populated in subject or message whichever is active
- Subject: Define Subject of the SAP Internal Alert
- Message: Define Message of the SAP Internal Alert

**Configuring SMS Alert**

- To configure the SMS alert, select “SMS” column check box.
- After selecting “SMS” check box, "SMS Message" column will be enabled then click on “SMS Message” column to open “SMS Message – Setup” window and define “SMS” details (refer to Alert Management).

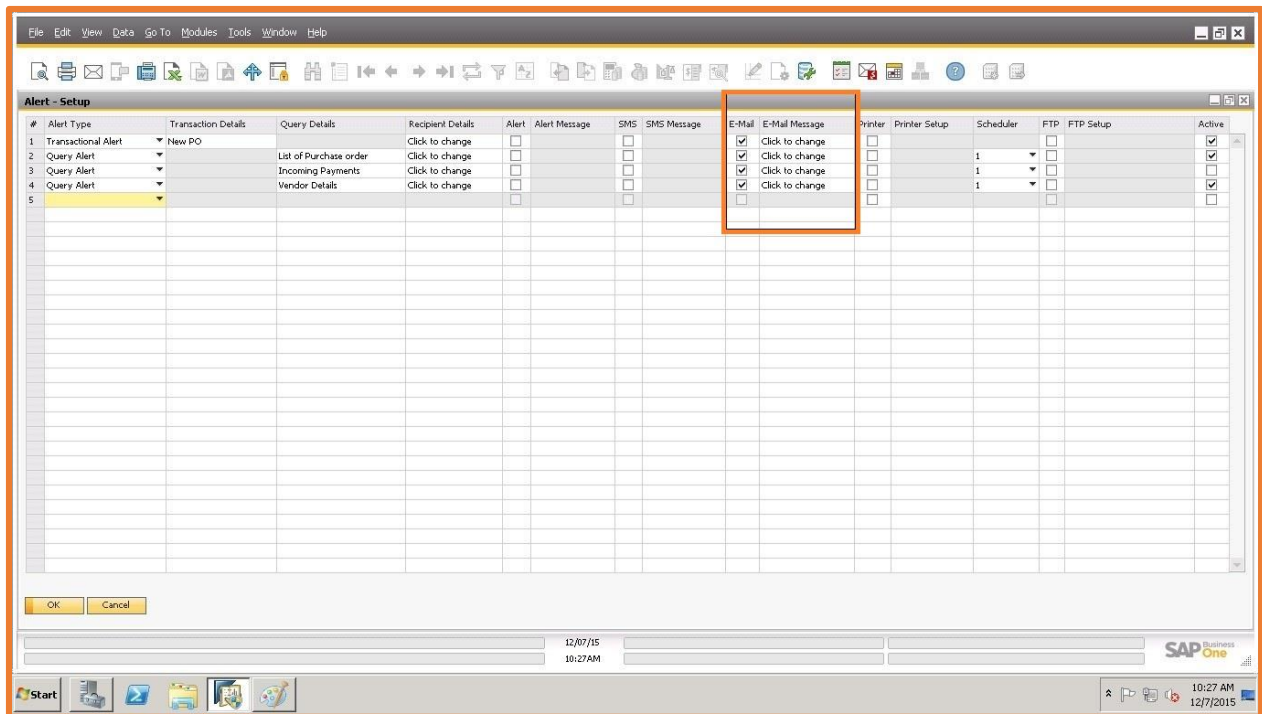


**Field details are mentioned below:**

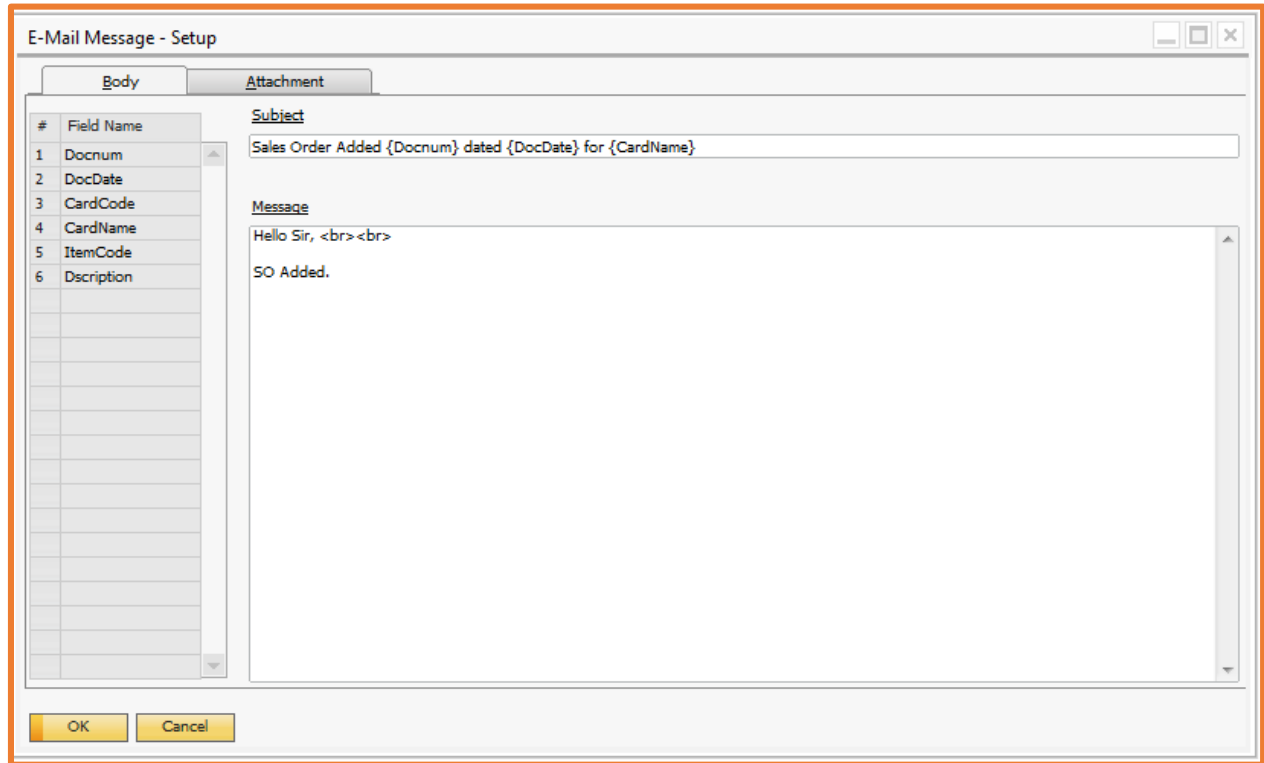
- Field Name: The entire query fields are listing under it. If dynamic data is required in SMS message then double click the query field, field will be automatically populated message field.
- Message: Define SMS Message.

**Configuring E-Mail Alert**

- To configure the E-Mail alert, select “E-Mail” column check box.
- After selecting “E-Mail” check box, “E-Mail Message” column will be enabled then click on “E-Mail Message” column to open “E-Mail Message – Setup” window and define “E-Mail Message” details.



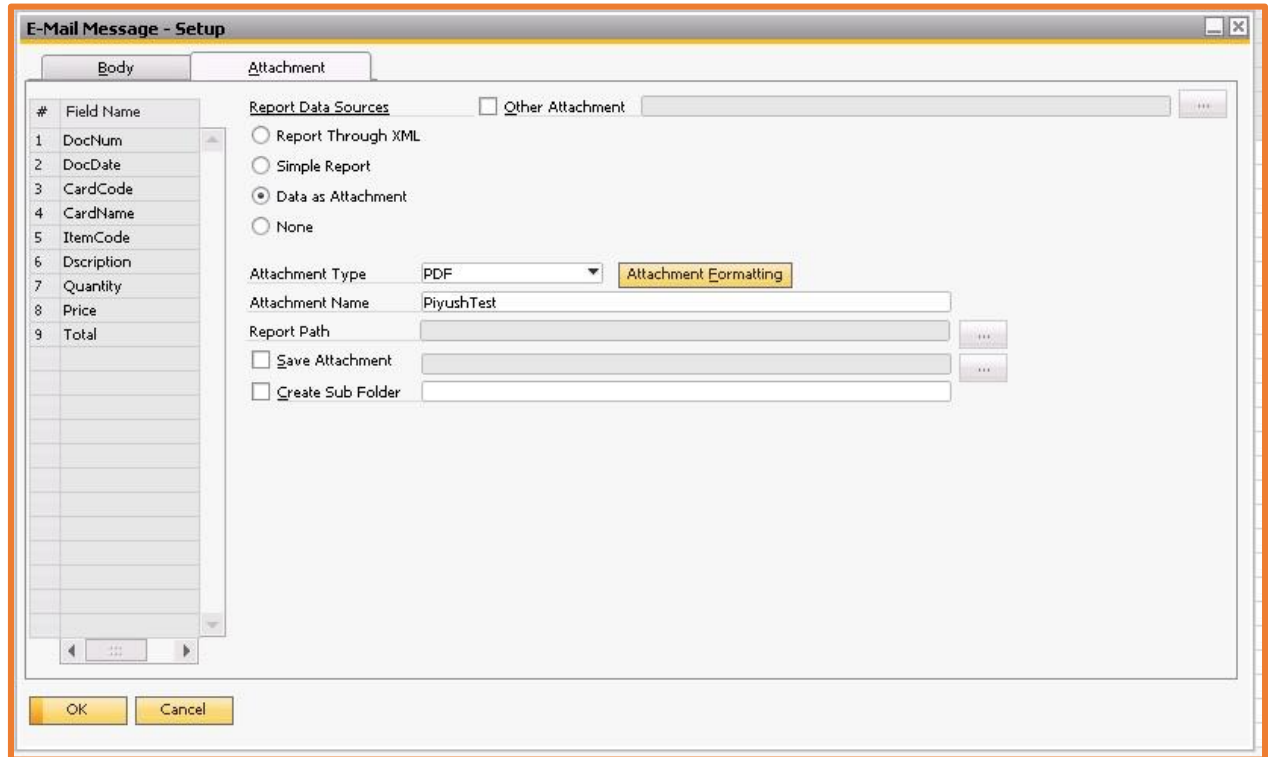
- **Configuring E-Mail Content:** E-Mail Content is configured under the Body Tab of “E-Mail Message - Setup” window.



**Field details of E-Mail body tab are mentioned below:**

- Field Name: The entire query fields are listing under it. If dynamic data is required in E-Mail subject or message then double click the query field, field will be automatically populated message field.
- Subject: Define E-Mail subject.
- Message: Define E-Mail Message (HTML syntax can be used to format message like <br> is used).

*Configuring E-Mail Attachment:* E-Mail attachment is configured under the Attachment Tab of “E-Mail Message - Setup” window.



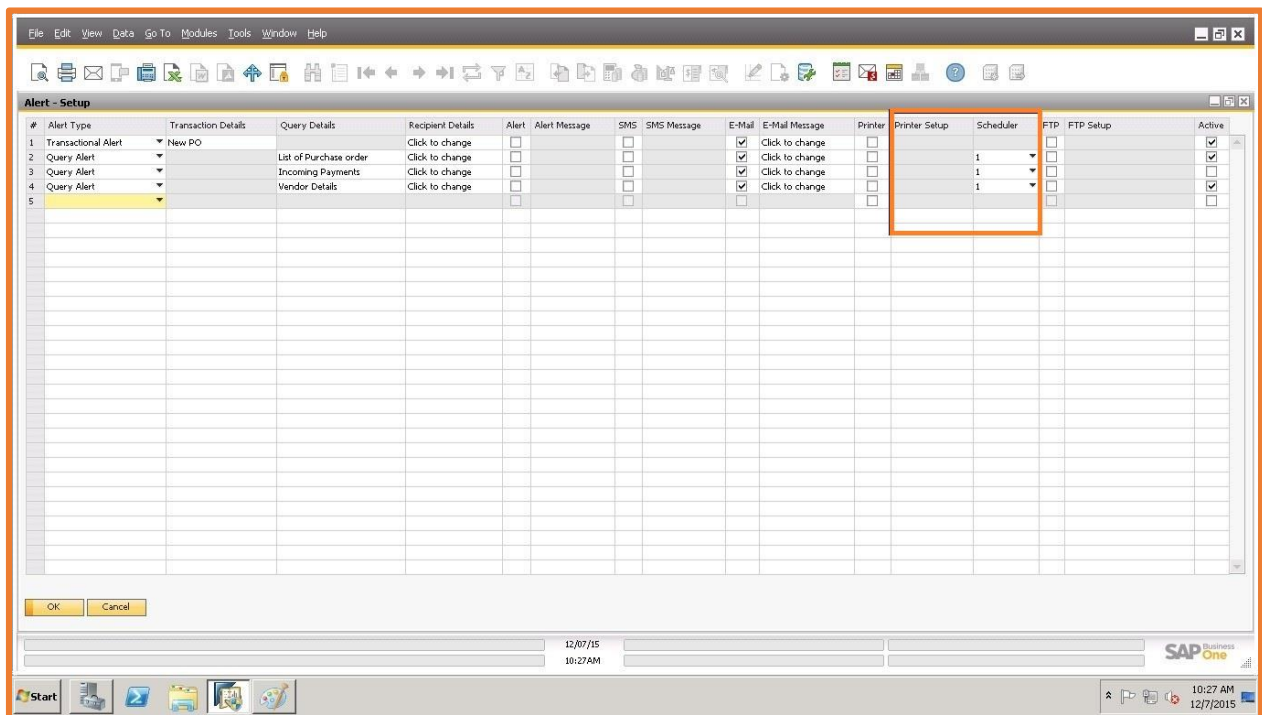
**Field details are mentioned below:**

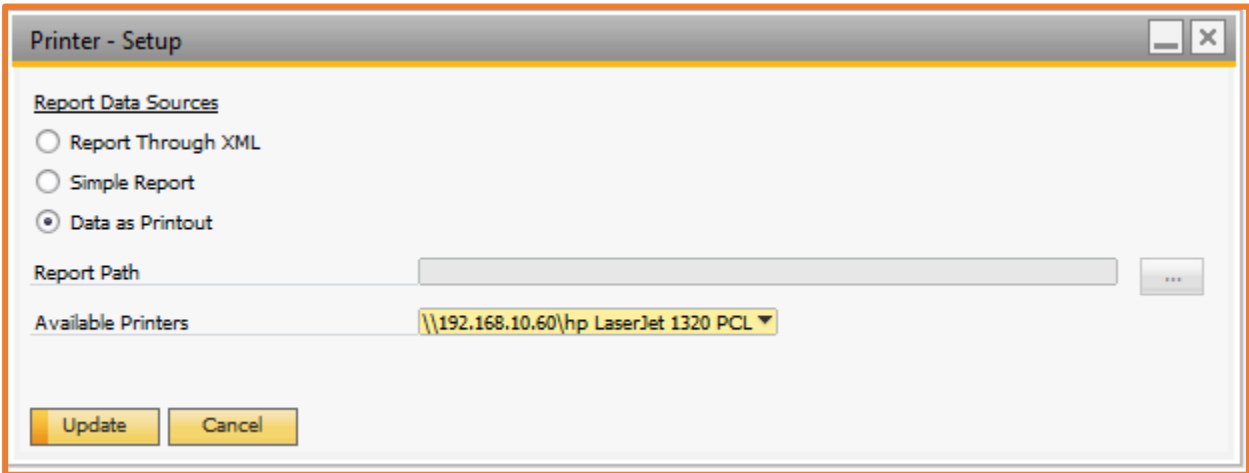
- Field Name: The entire query fields are listing under it. If dynamic data is required in Attachment name then double click the query field, field will be automatically populated in attachment name.
- Select: If any field required to ignore then unselect check box in front of field.
- Report through XML: If report is require to send in E-Mail as attachment and XML is used as data source in report then select this option.
- Simple Report: If report is require to send in E-Mail as attachment and query is used as data source in report then select this option.
- Data as Attachment: If there is no pre-defined format and data return by query is required as attachment then select this option.
- Attachment Type: If attachment is required in E-Mail alert then select attachment type. Attachment type can be Word, Excel or PDF.
- Attachment Name: Define attachment name.
- Report Path: If report is required to send as attachment then browse report path.
- Other Attachment: If any attachment which is not having any dynamic data required to send to all the recipient then select “Other Attachment” and browse file (i.e. Company Logo or catalog).

- Save Attachment: The user can have a copy of the attachment(s) included in the alert saved to the hard drive. The user can browse the location to save the attachment.
- Create Sub Folder: The user can also mention the sub folder in which the attachment is saved. This option is only available if the “save attachment” check box is checked.

### Configuring Printer Alert:

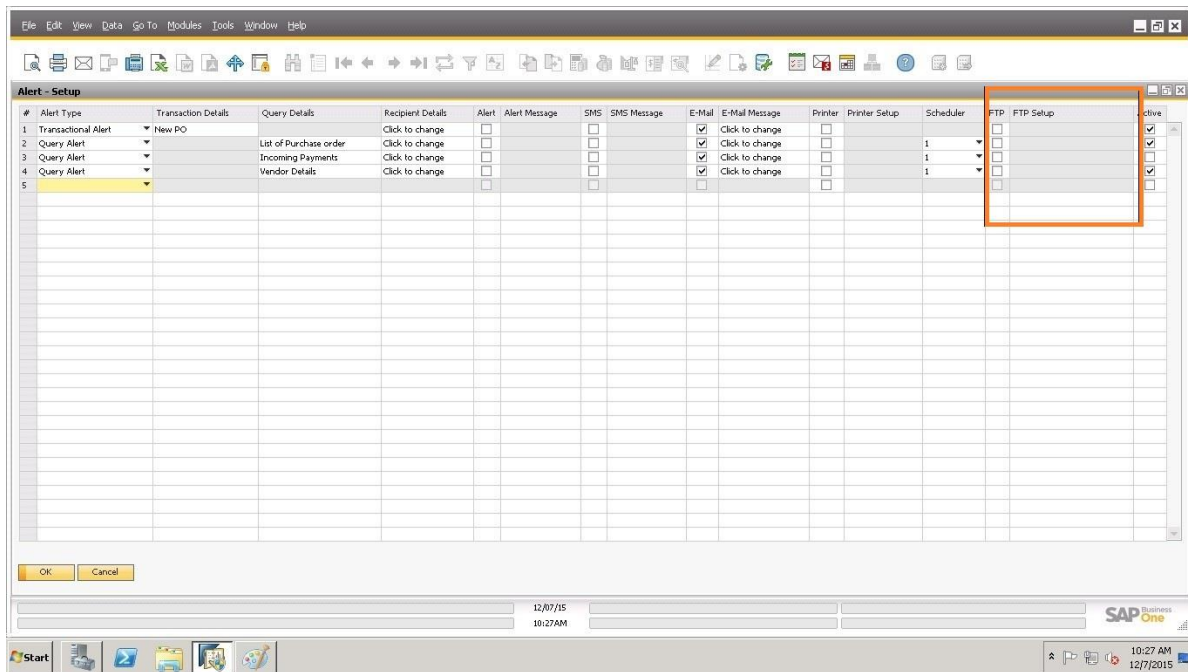
- To configure the Printer alert, select the “Printer” column check box.
- After selecting the “Printer” check box, the “Printer” column will be enabled then click on it to open the “Printer – Setup” window and define “Print” details.



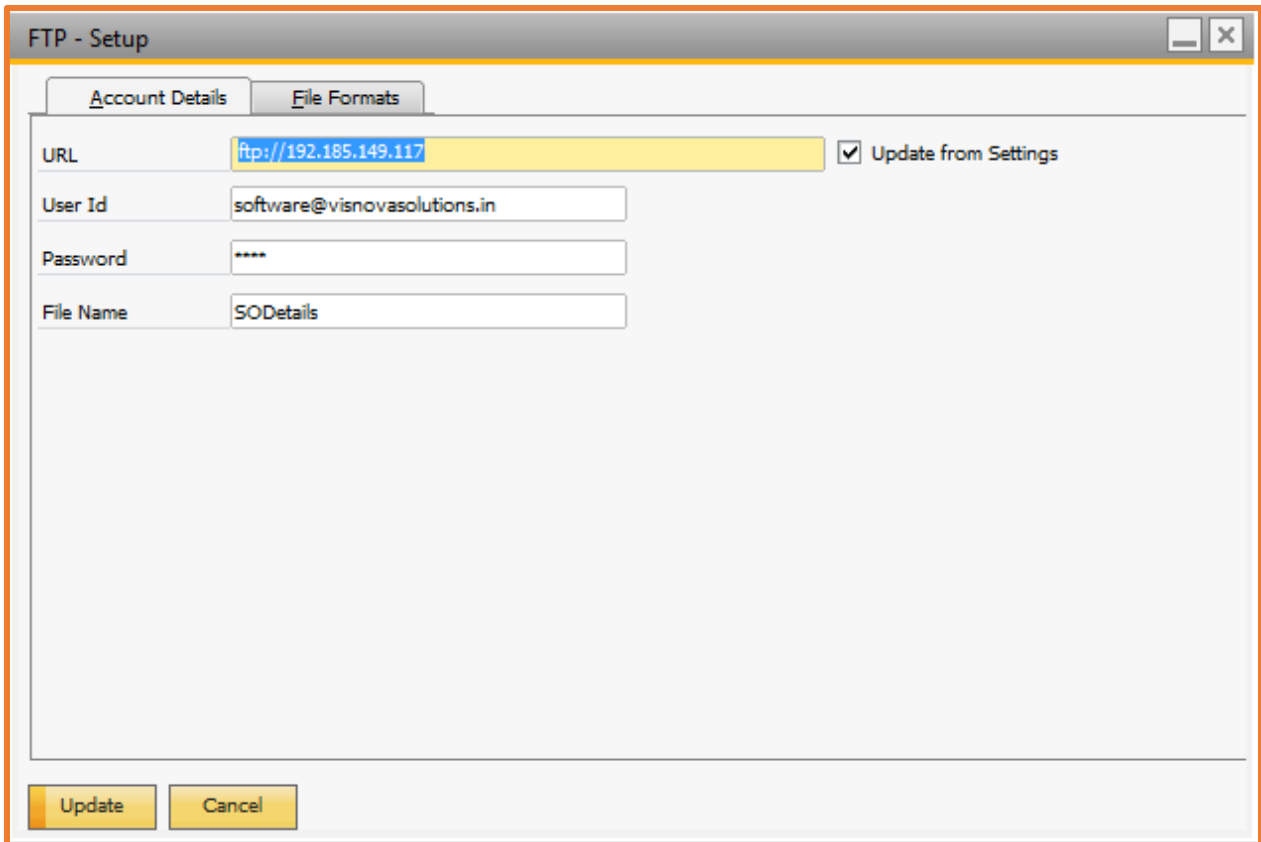


### Configuring FTP Alert:

- To configure the FTP alert, select the “FTP” column check box.
- After selecting the “FTP” check box, the “FTP” column will be enabled then click on it to open “FTP – Setup” window and define file format required to upload on FTP.



- Configuring FTP Account Details: The FTP account details are defined under the “Account Details” tab of “FTP Setup” window.



The screenshot shows the 'FTP - Setup' window with the 'Account Details' tab selected. The fields are as follows:

Field	Value
URL	ftp://192.185.149.117
User Id	software@visnovasolutions.in
Password	****
File Name	SODetails

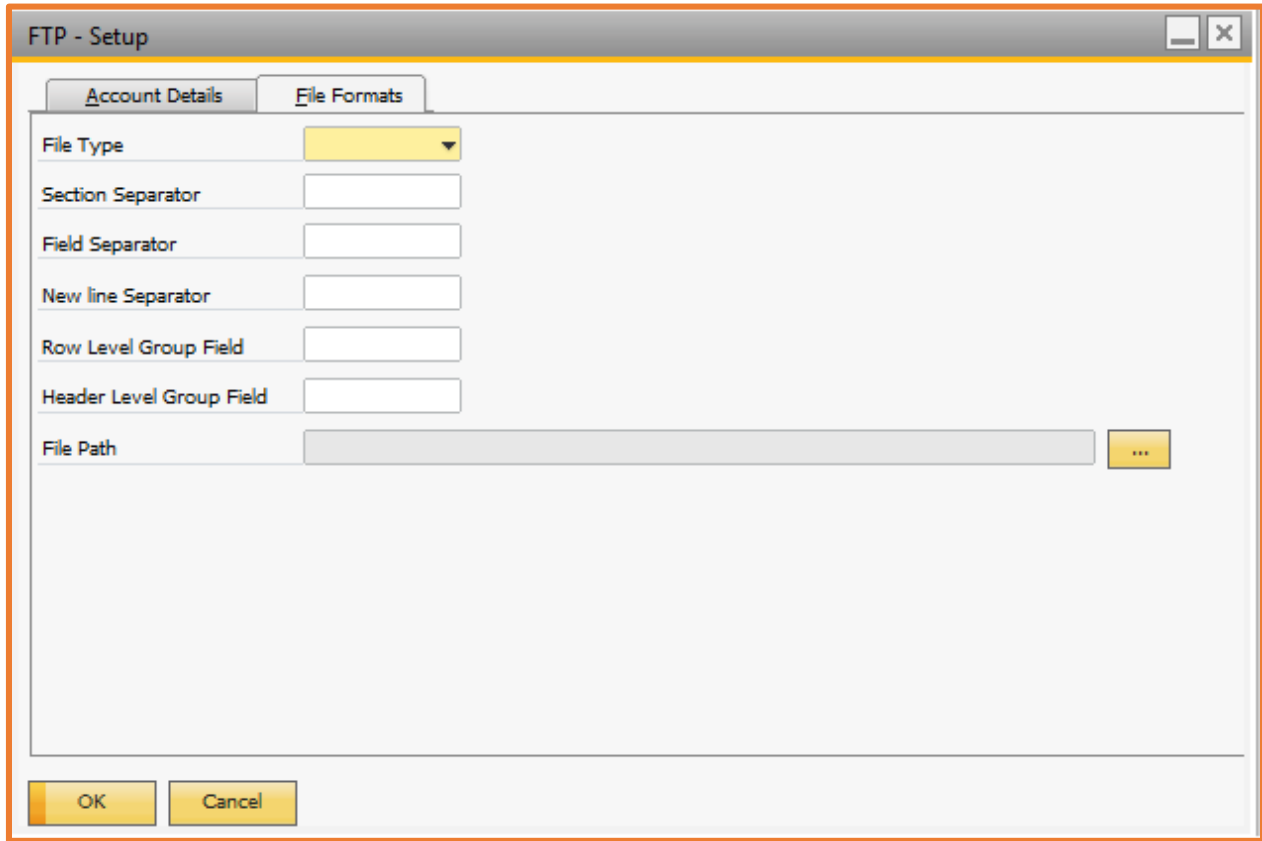
The 'Update from Settings' checkbox is checked. The 'Update' and 'Cancel' buttons are located at the bottom of the window.

**Field details are mentioned below:**

- URL: Define FTP URL, by default it is picked from Alert Settings.
- User ID: Define FTP valid user ID, by default it is picked from Alert Settings.
- Password: Define FTP User password, by default it is picked from Alert Settings.
- Update from Settings: Enabled field if FTP details need to be copied from Alert Settings.

**Configuring File Formats:** Configuring the File format is required to upload on FTP, and can be found under the “File Format” Tab of the “FTP – Setup” window.

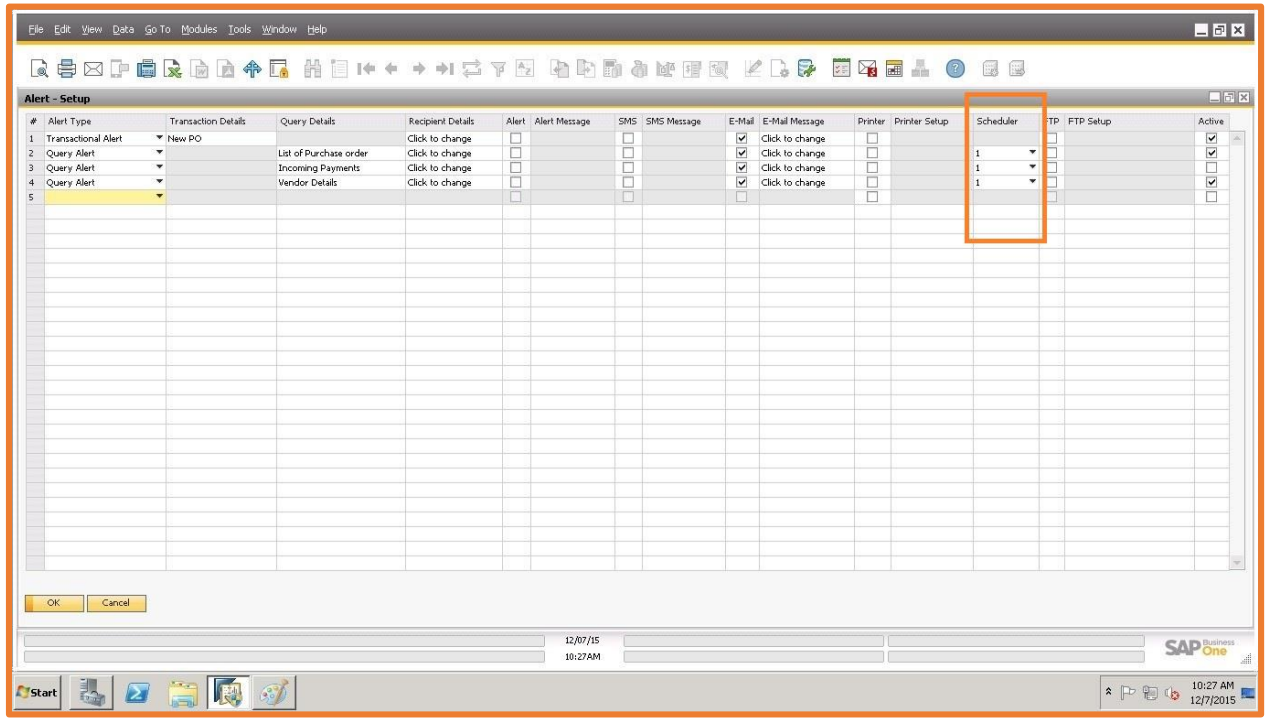




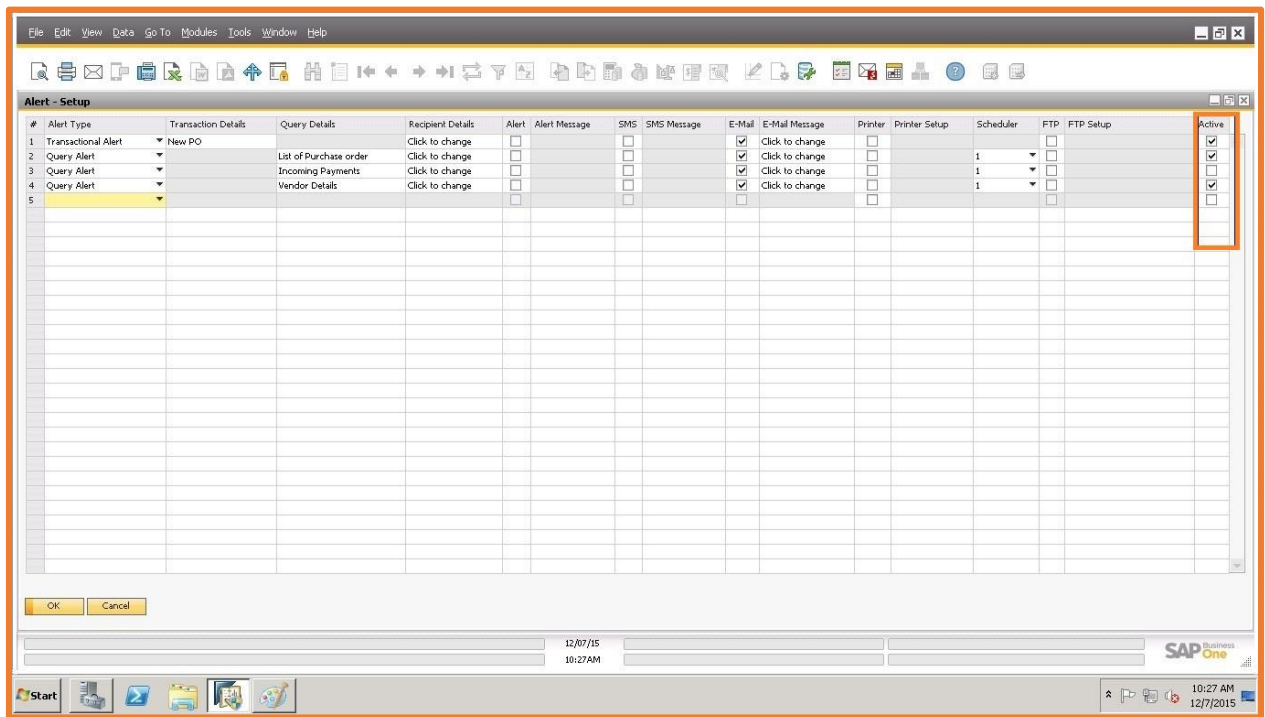
**Fields details are mentioned below:**

- File Type: Select type of file required to upload on FTP. File type can be Text file or CSV file.
- Section Separator: Define section separator in file.
- Field Separator: Define field separator.
- New line Separator: Define new line separator.
- Row Level Group Field: Define field required for repetitive data.
- Header Level Group Field: Define field required for header data.
- File Path: Browse File template file according to its format File will be uploaded on FTP.

*Configuring Alert with Scheduler:* If the “Alert Type” is a query then select the scheduler to configure the alert execution date and time. The Scheduler defined in the “Alert Scheduler - Setup” window.



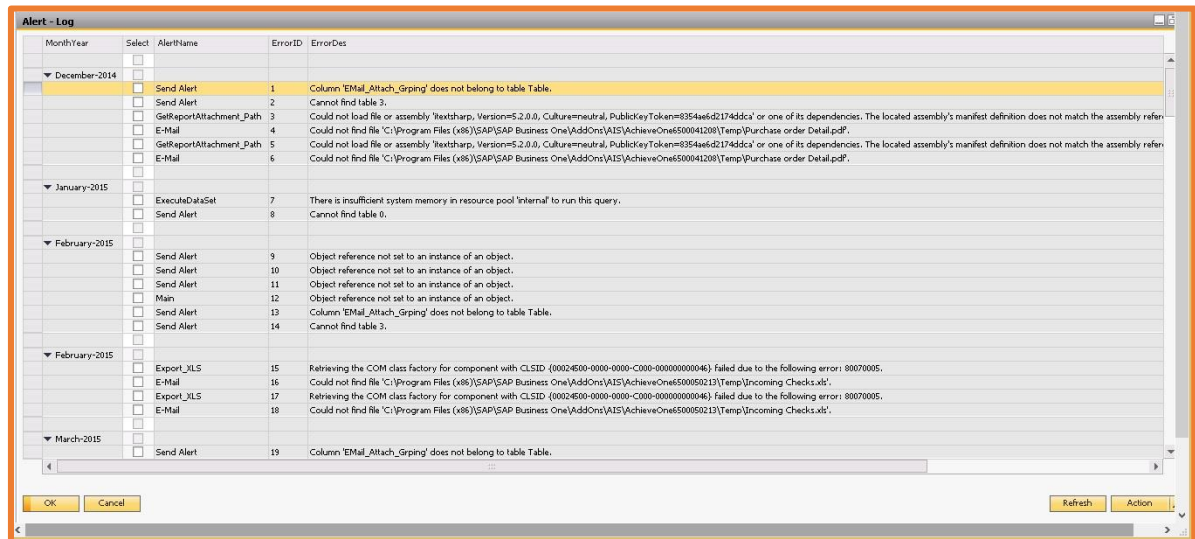
**Activating Alert:** To activate or deactivate alerts enable or disable this field.



## Alert Log

Alert success/ failure can be checked in an Alert Log. It shows all alert execution details.

*Achieve one > Achieve Alert management > Alert Log*

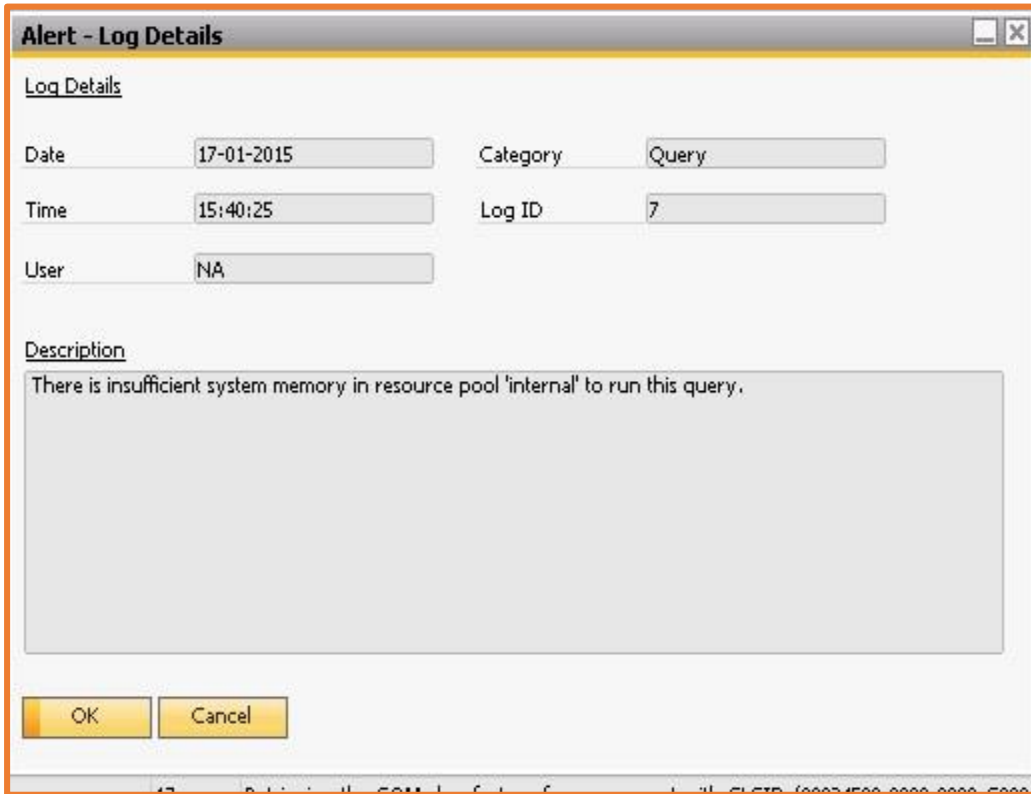


MonthYear	Select	AlertName	ErrorID	ErrorDes
▼ December-2014	<input type="checkbox"/>			
	<input type="checkbox"/>	Send Alert	1	Column 'EMail_Attach_Grping' does not belong to table Table.
	<input type="checkbox"/>	Send Alert	2	Cannot find table 3.
	<input type="checkbox"/>	GetReportAttachment_Path	3	Could not load file or assembly 'textsharp, Version=5.2.0.0, Culture=neutral, PublicKeyToken=9354ae6d2174ddca' or one of its dependencies. The located assembly's manifest definition does not match the assembly refer...
	<input type="checkbox"/>	E-Mail	4	Could not find file 'C:\Program Files (x86)\SAP\SAP Business One\AddOns\AIS\AchieveOne6500041209\Temp\Purchase order Detail.pdf'.
	<input type="checkbox"/>	GetReportAttachment_Path	5	Could not load file or assembly 'textsharp, Version=5.2.0.0, Culture=neutral, PublicKeyToken=9354ae6d2174ddca' or one of its dependencies. The located assembly's manifest definition does not match the assembly refer...
	<input type="checkbox"/>	E-Mail	6	Could not find file 'C:\Program Files (x86)\SAP\SAP Business One\AddOns\AIS\AchieveOne6500041209\Temp\Purchase order Detail.pdf'.
▼ January-2015	<input type="checkbox"/>			
	<input type="checkbox"/>	ExecuteDataSet	7	There is insufficient system memory in resource pool 'internal' to run this query.
	<input type="checkbox"/>	Send Alert	8	Cannot find table 0.
▼ February-2015	<input type="checkbox"/>			
	<input type="checkbox"/>	Send Alert	9	Object reference not set to an instance of an object.
	<input type="checkbox"/>	Send Alert	10	Object reference not set to an instance of an object.
	<input type="checkbox"/>	Send Alert	11	Object reference not set to an instance of an object.
	<input type="checkbox"/>	Main	12	Object reference not set to an instance of an object.
	<input type="checkbox"/>	Send Alert	13	Column 'EMail_Attach_Grping' does not belong to table Table.
	<input type="checkbox"/>	Send Alert	14	Cannot find table 3.
▼ February-2015	<input type="checkbox"/>			
	<input type="checkbox"/>	Export_XLS	15	Retrieving the COM class factory for component with CLSID {00024600-0000-0000-0000-000000000046} failed due to the following error: 80070005.
	<input type="checkbox"/>	E-Mail	16	Could not find file 'C:\Program Files (x86)\SAP\SAP Business One\AddOns\AIS\AchieveOne6500050213\Temp\Incoming Checks.xls'.
	<input type="checkbox"/>	Export_XLS	17	Retrieving the COM class factory for component with CLSID {00024600-0000-0000-0000-000000000046} failed due to the following error: 80070005.
	<input type="checkbox"/>	E-Mail	18	Could not find file 'C:\Program Files (x86)\SAP\SAP Business One\AddOns\AIS\AchieveOne6500050213\Temp\Incoming Checks.xls'.
▼ March-2015	<input type="checkbox"/>			
	<input type="checkbox"/>	Send Alert	19	Column 'EMail_Attach_Grping' does not belong to table Table.

Field details are mentioned below:

- Month Year: Alert execution month and year list in this field.
- Select: Select field if log details are required to delete or alert required to resend.
- Alert Name: Alert Name for which log is maintained.
- Error ID: Error ID is listed in this field.
- Error Des: Error description is listed in this field.
- Error Date: Error occurrence date is listed in this field.
- Error Time: Error occurrence time is listed in this field.
- Display: Select to expand or collapse alert log details.
- Action: Select to delete or resend selected alert.

*Log Details:* Double click on any row in the log to review the details of the Alert Log.



**Field details are mentioned below:**

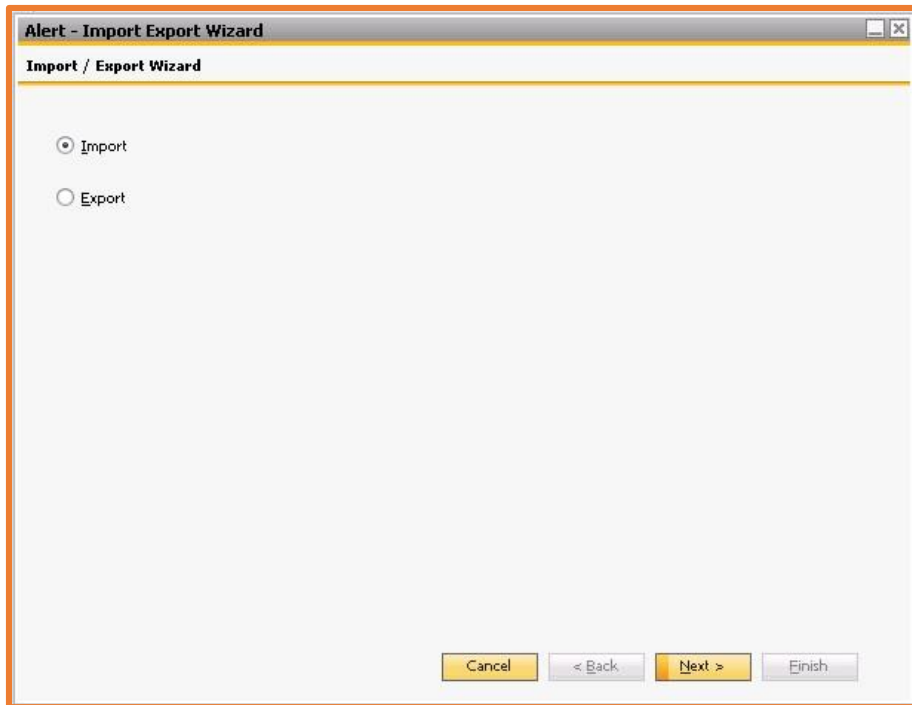
- Date: Alert error date.
- Time: Alert error time.
- User: User associated with alert error.
- Category: Shows alert type.
- Description: Alert error detailed description.

## Alert Import Export

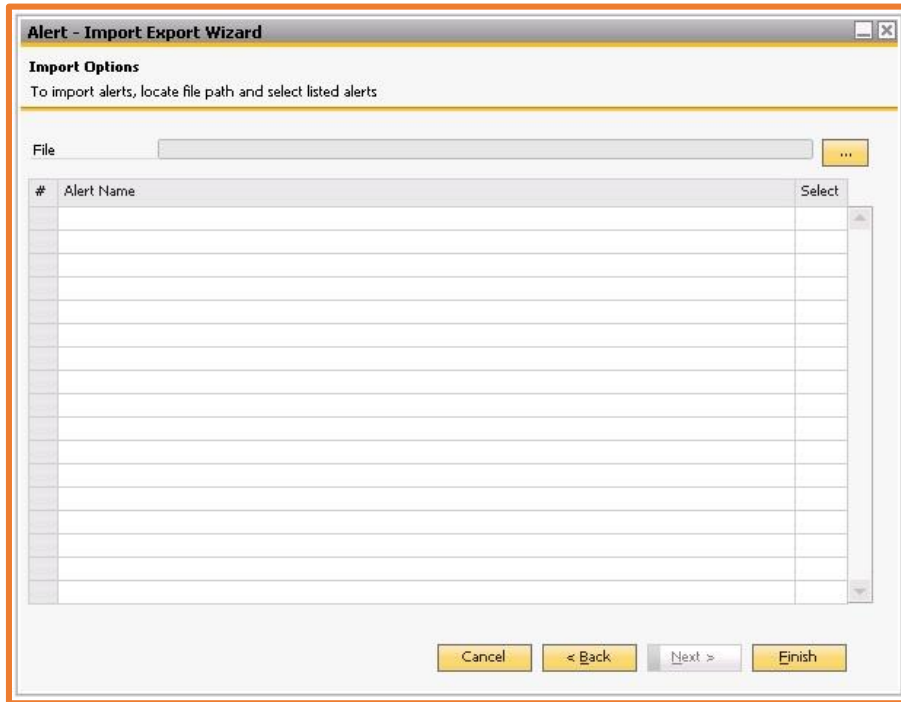
To Import – Export alert, we will use the Alert Import Export wizard is used.

*Achieve one > Achieve Alert management > Alert Import*

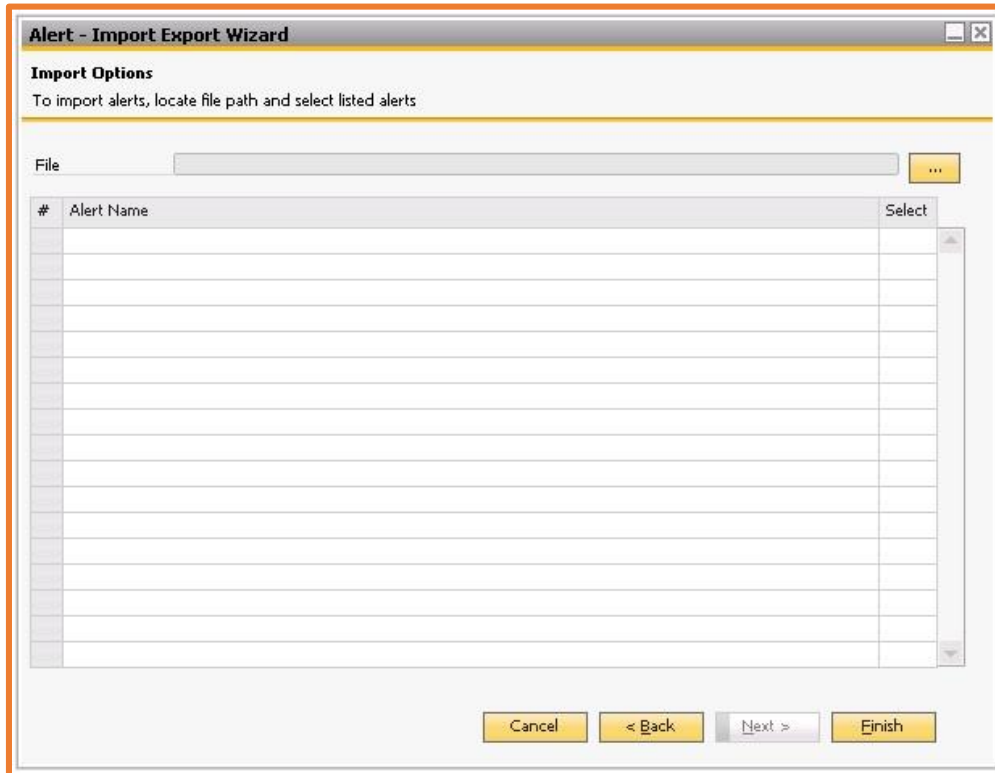
**Importing an Alert Using the Alert Import Export Wizard:** To import alert using Alert Import Export Wizard.



- Select “Import” and click the next button.

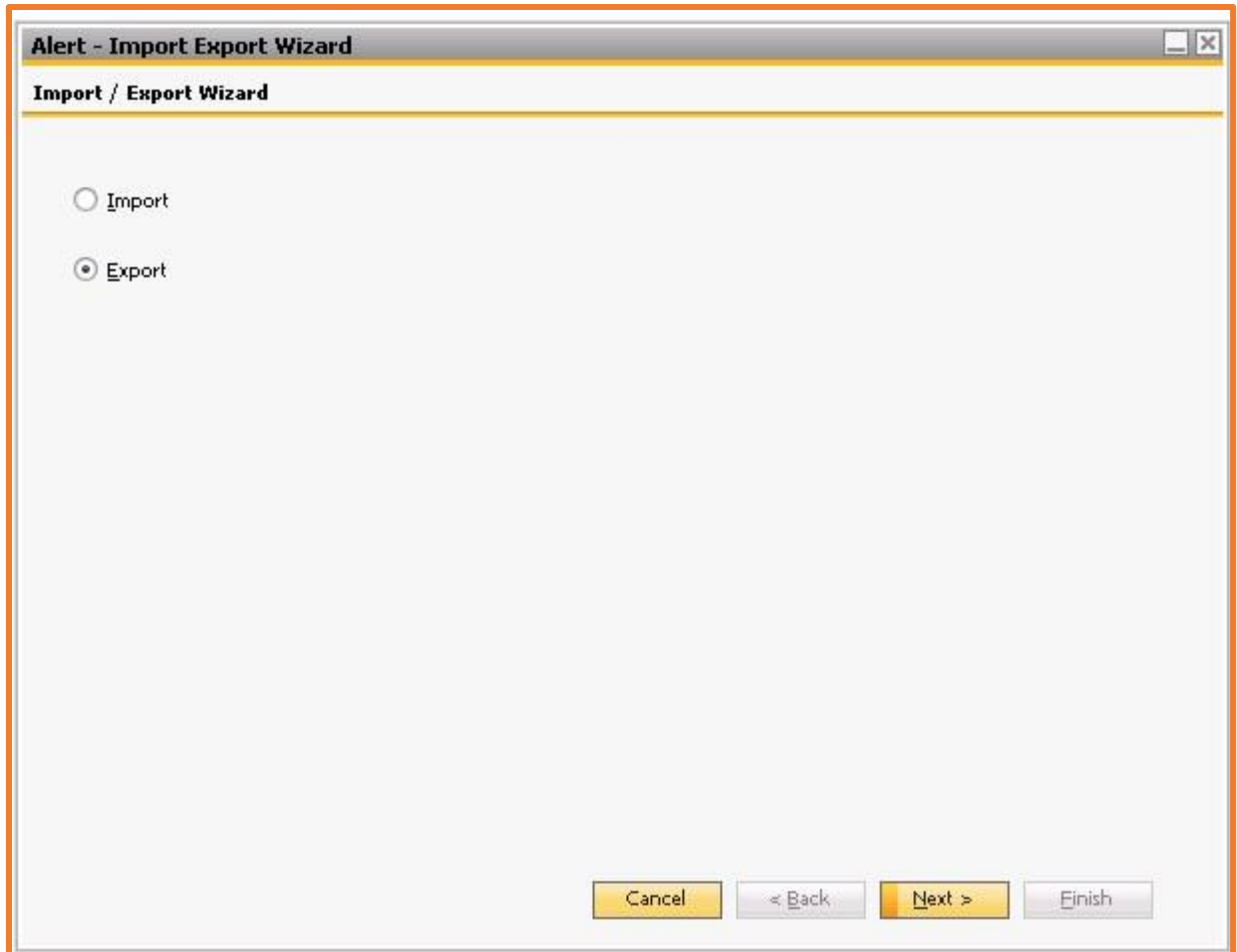


- Browse the exported Alert file.



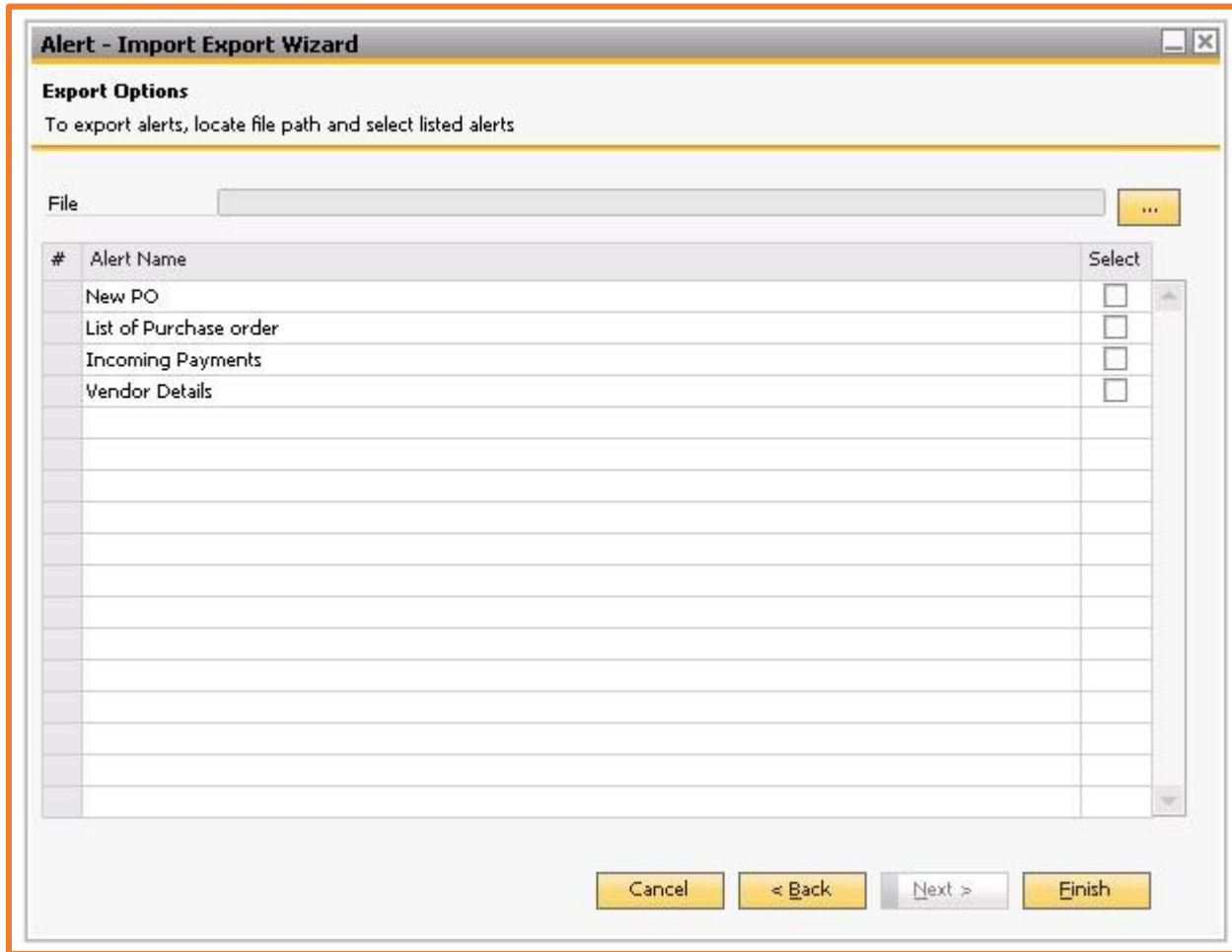
- The Alerts in the file will be listed when you browse.
- Select Alert(s) required to import.
- Click on finish to import the alert in SAP Business One.

**Exporting an Alert Using the Alert Import Export Wizard:** To export alert using Alert Import Export Wizard.



- Select Export and click the next button.





- All the alerts defined on “Alert – Setup” are listed.
- Browse Alert export path.
- Select Alert required to export.
- Click on finish to export the alert from SAP Business One.