Configure Actions

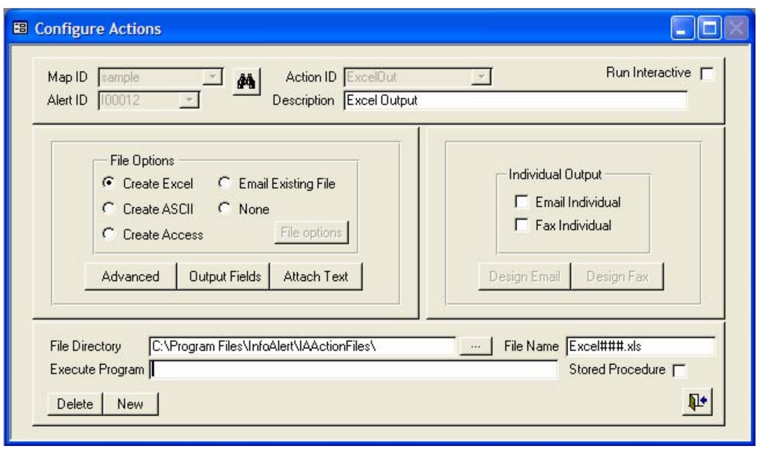
Actions are functions that run after an alert, acting upon the data returned by the alert's logic. For example if you have an alert that is designed to identify open invoices that are older than X days and email the A/R clerk you might also want dunning messages sent to your customers. An action can be defined for this alert that will group the open invoices by customer ID, pull the email or fax ID from the customer record and send the dunning message to your customer.

Actions can be configured to do the following tasks:

- Send emails to individual customers, vendors, employees
- Send faxes to individual customers, vendors, employees
- Create ASCII files with output from alerts
- Create an Excel spreadsheet with output from alerts
- Create an MS Access table in a remote database
- Email an existing file as an attachment
- Run a program (Command Line Option)

Sample File Output:

Below is a sample output to an Excel spreadsheet. Note: ASCII file output would be the same process.



In this example we selected a Map ID and alert ID then gave it an Action ID of ExcelOut. In the file options we selected the "Create Excel" option.

We told it what directory we wanted the file to be created under then gave it a file name of Excel###.xls. Please note the "###" in the file name is described below.

File naming:

When Info-Alert creates an output file it will overwrite a file with the same name found in the defined directory. This works well when you want the latest data at any given time in a common file name but does not work if you need a history of created files or a little more time to review one file before the next one is created.

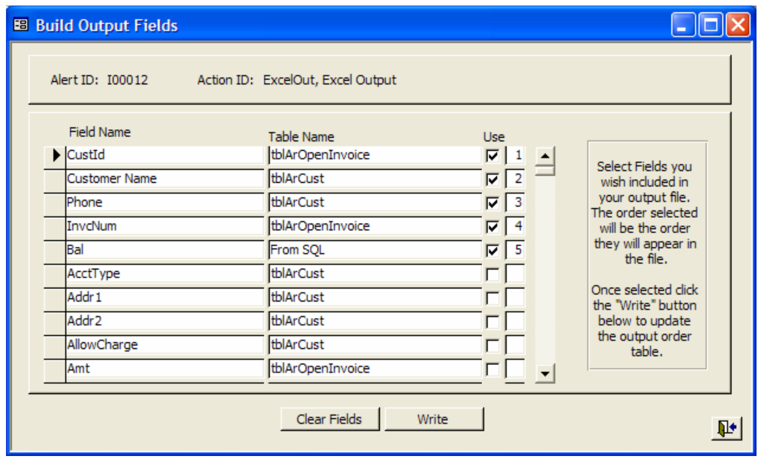
When you enter a file name you can use one of the following masks to create unique file names. File###.xls where ### will be replaced by a numeric value, i.e. File001.xls, File002.xls, etc. You can use any number of pound signs in your file name, i.e. File##.xls or File####.xls.

You can also use a date mask, i.e. FileYYMMDD.xls or FileMMDDYY.xls. This will produce a file name with the date in it. If needed you can use a combination of the masks, i.e. FileYYMMDD##.xls will produce a file name of File05122801.xls, etc.

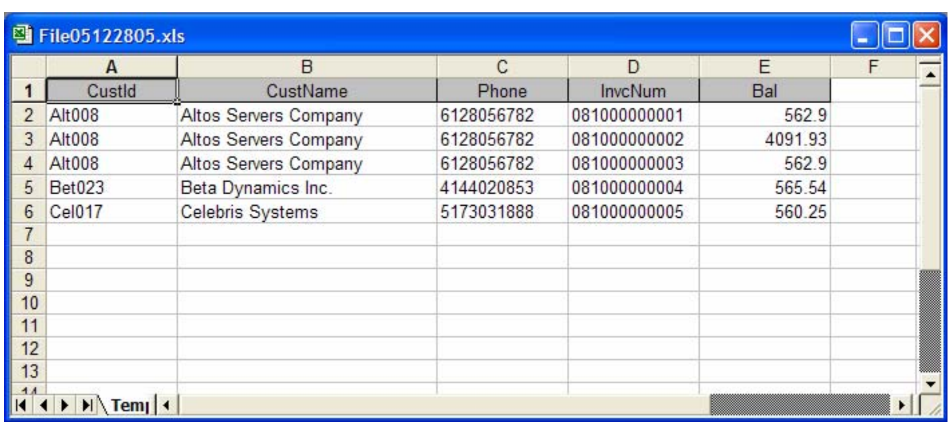
Create output fields:
Next we will indicate what fields we want in our Excel Sheet. Press the "Output Fields" button to bring up the screen below.

Available fields from your alert will be presented for your selection. Check the fields you would like in your output file and in the order you would like them to show up.

Once you have your fields defined select the "Write" button to commit them to the action.



The following spreadsheet will be created in the directory you selected.



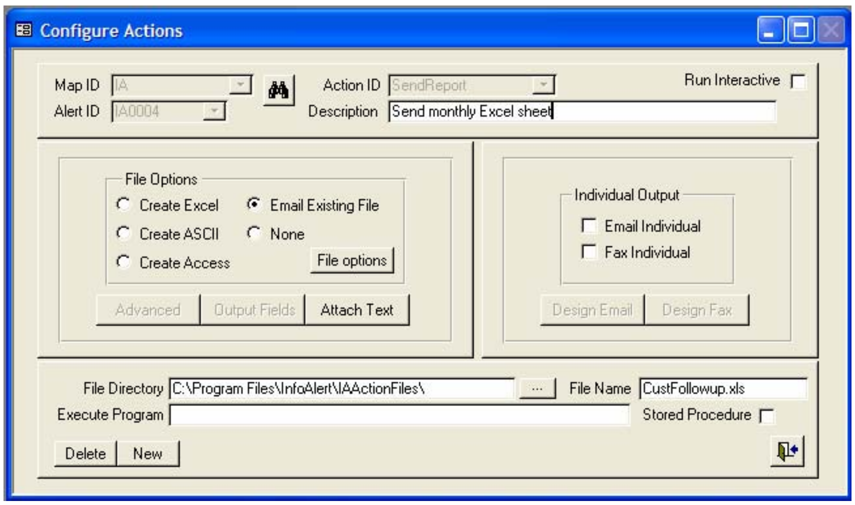
	A	B	C	D	E	F
1	CustId	CustName	Phone	InvcNum	Bal	
2	Alt008	Altos Servers Company	6128056782	081000000001	562.9	
3	Alt008	Altos Servers Company	6128056782	081000000002	4091.93	
4	Alt008	Altos Servers Company	6128056782	081000000003	562.9	
5	Bet023	Beta Dynamics Inc.	4144020853	081000000004	565.54	
6	Cel017	Celebris Systems	5173031888	081000000005	560.25	
7						
8						
9						
10						
11						
12						
13						

Send an existing file as an attachment:

In the example below we will display how to send an existing file as an email attachment. This is normally used when you have a file that gets created by some other means and you want that file automatically sent to various recipients. Note: You can also have Info-Alert create a file based on alert information then send this file as an attachment to various individuals.

Since actions and events must be attached to an alert we will use a generic alert with our action. There is an alert created in the "IA" data map, ID = IA0004. This alert will always return a record so it can be used with all actions and events that are not based on alert data.

Create an action:

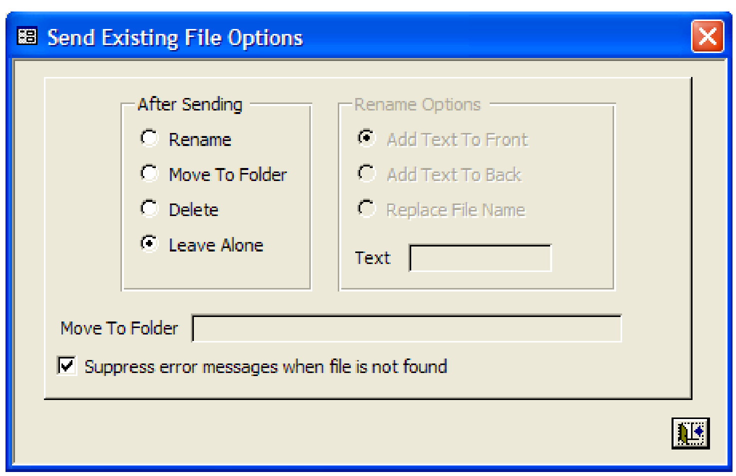


You need to create an action that will be used to send your file. We will select map ID "IA" and alert "IA0004" then make up a new Action ID. In this case we used "SendReport" with a description of "Send monthly Excel Sheet"

We need to select the "Email Existing File" option for File Options then indicate the File Directory and File Name where the file we wish to send is, or will be located. Note: The file does not have to exist at this time but the directory and file name that we enter is where Info-Alert will check as it runs.

File Options:

Next we will press the "File Options" button to tell Info-Alert what to do with the file once it sends it.



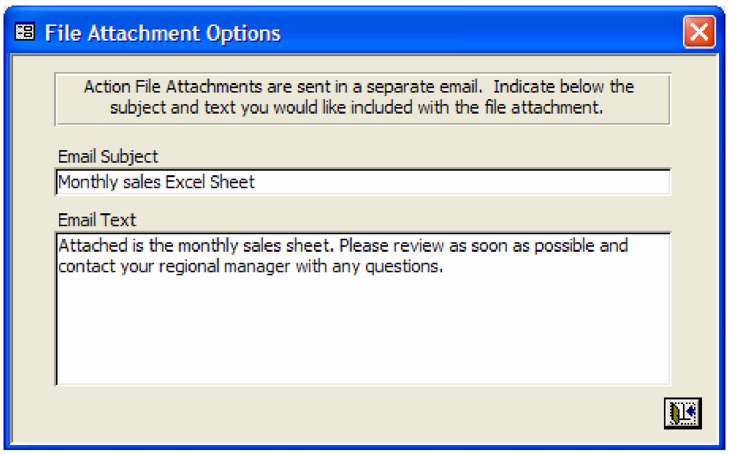
In this example we have told Info-Alert to leave the file alone after sending. We could have used one of the following options also.

"Rename" - This, allows us to add text to the front or back or the file or to replace the name with an entirely new one.

"Move To Folder" – This function will let us move the file to another folder after sending. This way Info-Alert will not send the file a second time.

"Delete" – This option will delete the file once sent. Deleting the file assures that it will not be sent again. You should only use this option if you no longer need the file in question or can easily recreate it.
There is also an option to **"Suppress error messages when file is not found".** This option will prevent any error messages from being written to the error log when the file that Info-Alert is looking for is not found in the directory. This option should be checked when you have Info-Alert looking for a file in a directory on an hour by hour or day by day basis that will only be there once in a while. There is no need to create error log entries when it is a normal for the file to not be there.

Attachment Text:

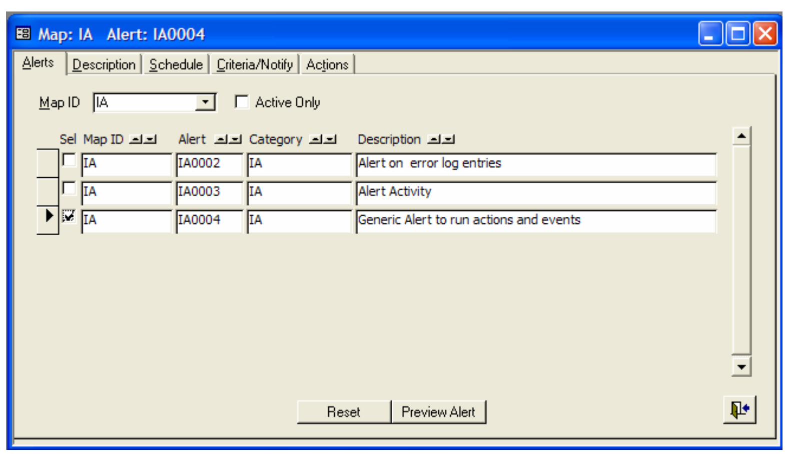


Use the "Attach Text" button to enter an email subject and text that you want to accompany your email file attachment.

Each time the file is sent with this action the subject and text shown here will be included.

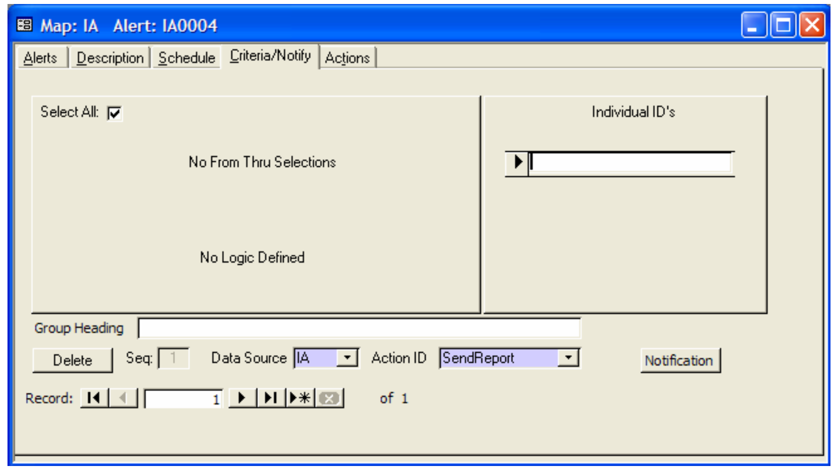
Configure your alert to send the action:

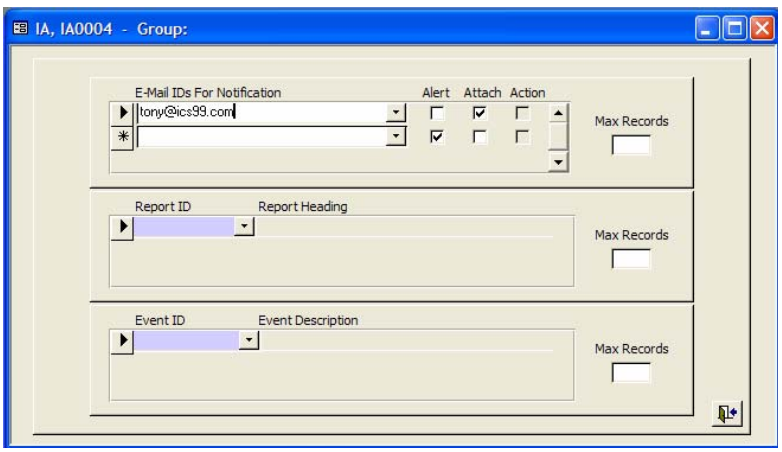
To configure your alert, select the IA alert IA0004.
On the "Configure/Notify" tab we will select the action that we previously created.



Enter the "Action ID" of the action we created in the procedure above. This is what tells Info-Alert what action to run each time the alert executes.

Press the "Notification" button to identify who will receive the emails with the file attached.





Enter the list of email ID's that you want this file attachment sent to. Be sure to check the "Attach" check box and uncheck the "Alert" check box.

This tells Info-Alert to send the file attachment but not to send any alert text.

<u>Send emails/faxes to individual customers, vendors and employees:</u>

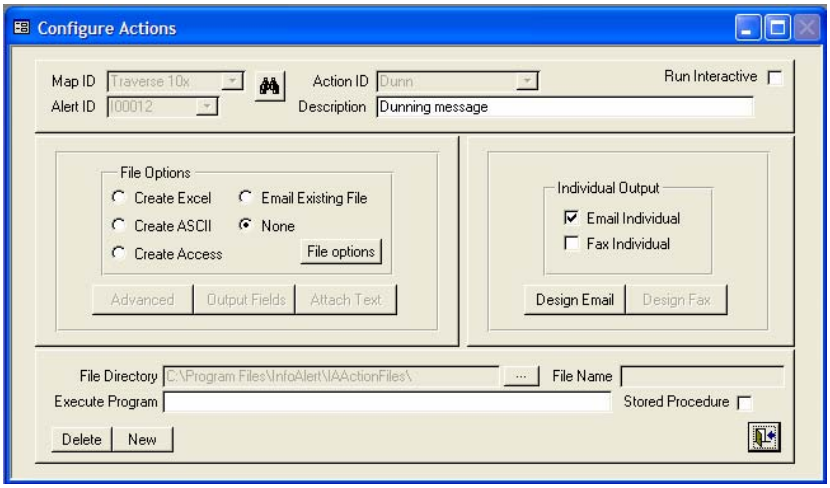
This function allows for you to send emails, or faxes, to individual ID's found in the data returned by an alert. For example, you may want to run an alert to identify all customers who have invoices that are 45 days old. Along with an email list to your internal A/R clerk you also want to send a notice to each of the customers identified in the alert.

You could set up individual sequences using alert criteria to identify each customer and the corresponding email ID but for a large number of potential customers this would be a lot of work to setup and maintain.

Another option would be to configure an action that would pull the email ID (or fax number) out of the customer record of your accounting system. This way you can create one action output that can be used for many different customer notifications.

In the example below we will configure a dunning email message that will be sent to any customers who have an email ID in their customer record and who have records returned by the alert for past due invoices.

Create Action:



In this example we have created a new action. We entered the map ID that we wanted to use along with the alert ID that was already set up to identify past due invoices.

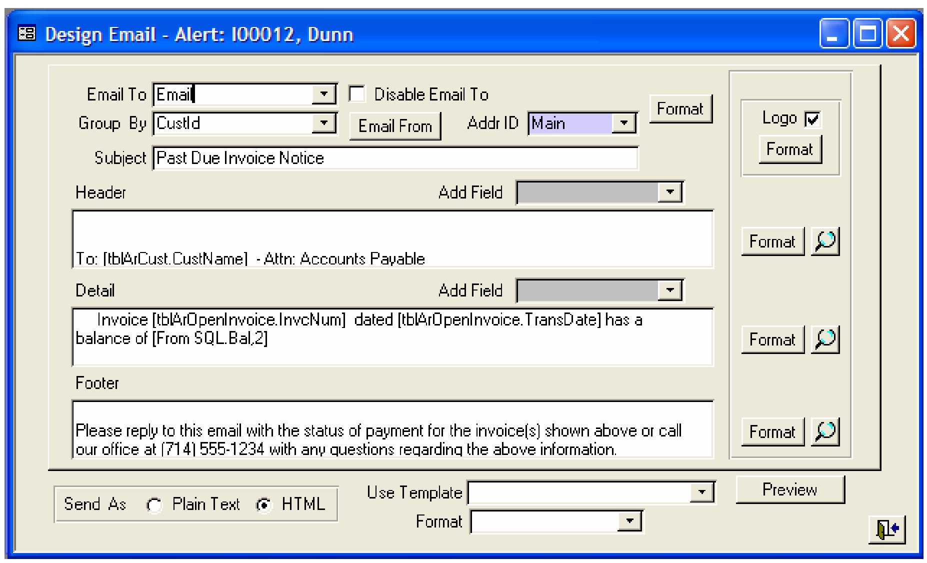
Note that we have checked the "Email Individual" check box, which enabled the "Design Email" button.

Design Email:

Next we will want to design the email output that will be the basis of a dunning message sent to our customers. The same design can be used to send faxed output; the sample below will focus on the email output.

The email and fax design functions of the action output allow you to create basic output that can be sent to customers, vendors, employees, etc. in HTML or Plain Text format.

For more advanced output and a richer look and feel you can use a report template.

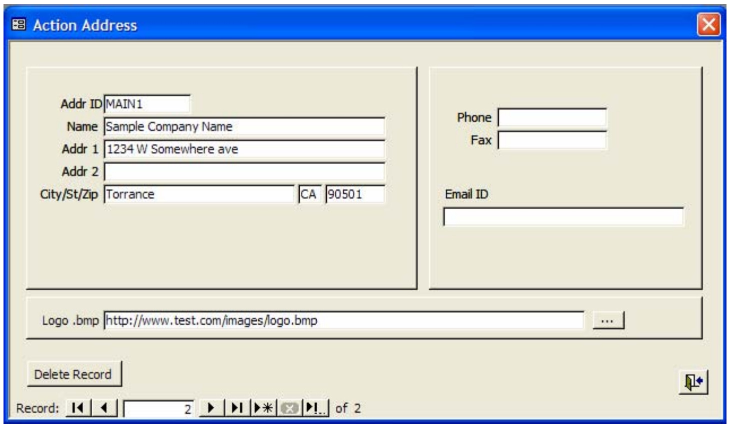


A description of the fields shown on the email design screen is shown below:

- **Email To:** This field is used to select the email ID found in the data returned by your alert. If you do not see the email ID in the pull down list you might need to make sure the data is included in the returned records in your alert.

- **Group By:** This field is used to group the records returned by the alert into individual emails. For example in the above sample we have a group by of "CustID" this tells Info-Alert to take all invoices for a given Customer (based on the CustID field), and include them on one email. We don't want to send a separate email for each open invoice past 45 days we would rather group them together on one email.
- **Subject:** This is where we enter the subject that we want shown on each email
- **Header, Footer, Detail:** These sections are where we enter text and data that will show up on the email. You can use the "Add Field" combo box to select fields where data will be inserted into your text. Info-Alert will attempt to replace any text within brackets [ ] with data from the returned alert. In the header section of our example above you will notice the text [tblArCust.CustName], Info-Alert will replace this text with the customer name from the returned alert data.
- **Send As Plain Text or HTML:** This option tells Info-Alert what format to send the email in.
- **Disable Email To:** Use this check box to indicate that we will not be pulling the email ID out of the database but will enter the ID's to send the action to during the notification setup.
- **Email From:** Use this button to identify a specific email from ID for this action. For example when we send a dunning email we may want any replies to the email to go back to our A/R clerk. An action created requesting the status on a P/O not received may use the purchasing agent as an email from.
- **Addr ID:** Assign an address ID for a company name and address that you would like on the header of your email. You set these addresses using the "Action Address" function.
- **Logo:** Check this box if you have a logo attached to your action address. Please review the information below on logo attachments.
- **Format:** Use the format button next to the various sections to apply basic format options, bold, italic, alignment and font size. Note: Most format options do not work when sending emails in plain text.
- **Use Template:** This field is used when Report Templates have been created and associated with this alert. Report Templates can be used for more advanced output. Please see another training bulletin for more information on report templates.

Note: Text from the detail section will show the invoice number, date and balance. Notice the balance field has a ,2 at the end of the field ID just before the close bracket. This tells Info-Alert to print this numeric value with a precision of 2. The dollar amount of twenty dollars will show as 20.00
Invoice [tblArOpenInvoice.InvcNum] dated [tblArOpenInvoice.TransDate] has a balance of [From SQL.Bal,2]



Action Address:
Attaching a logo to your email:
Notice the field called logo bmp shown on the screen to the left. When using an action HTML output without a template Info-Alert will embed the information required to point to a logo via an http location.

If you enter a logo found on a local directory, i.e. d:\logo.bmp the logo will only be available to those who have that logo available in the same directory on their system.