Using Report Templates

There are three main ways that Info-Alert generates notification output based on alerts being generated.

- Alert Text
- Action Output
- Output Files

Alert Text is the basic output notification that is defined when an alert is first created. Alert Text is meant to be a quick summary message emailed or printed that gives enough information to identify an issue. The alert text below is an example of basic information generated for past due invoices.

Alert: I00012 Customers who have open AR invoices over X days. Source: CPU Action:

All Records Selected Logic1: Invoices older than X days. 3 Logic2: But not older than X days. 3000

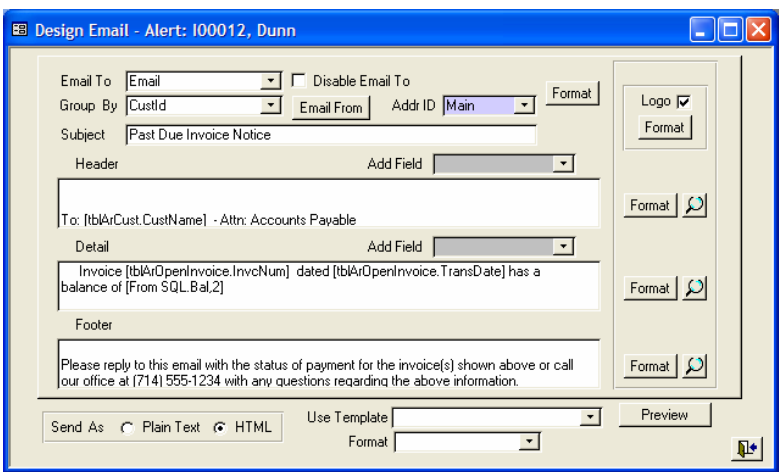
I00012	Customer Altos Servers Company has invoice number 081000000001, dated: 8/10/2002 with a balance of 562.90 over alert days.
I00012	Customer Altos Servers Company has invoice number 081000000002, dated: 8/10/2002 with a balance of 4091.93 over alert days.
I00012	Customer Altos Servers Company has invoice number 081000000003, dated: 8/10/2002 with a balance of 562.90 over alert days.
I00012	Customer Beta Dynamics Inc. has invoice number 081000000004, dated: 8/10/2002 with a balance of 565.54 over alert days.
I00012	Customer Celebris Systems has invoice number 081000000005, dated: 8/10/2002 with a balance of 560.25 over alert days.

End of sample alerts...

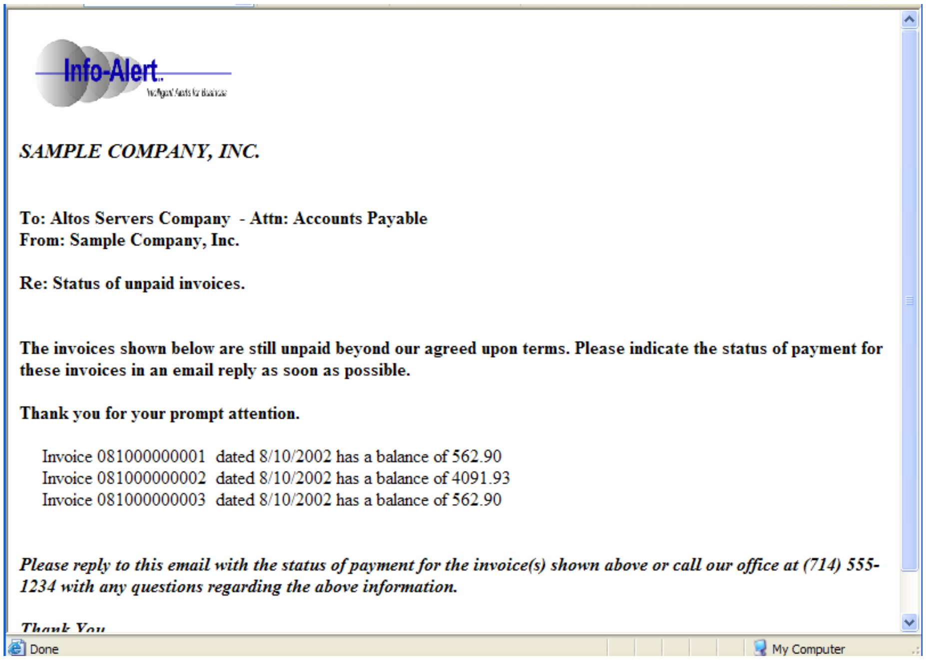
Using the alert shown above, if we wanted to send a notice to our customer that grouped the past due invoices together we would use an "Action". Actions take the output data generated by an alert and allow us to group and format it in a little more elaborate fashion.

A sample action for an emailed dunning message is shown here. The output will be grouped by "CustID" and an HTML message will be generated for each customer showing all past due invoices that meet the alert criteria. You can adjust the look of the output by using the Header, Detail and Footer sections of the output designer. The "Format" button will give you some control over the output but not as much as using a "Report Template"

The above setup is similar for the 'Fax Design' also.



The following is a sample HTML output from the Action output design shown here.



Info-Alert.

SAMPLE COMPANY, INC.

To: Altos Servers Company - Attn: Accounts Payable
From: Sample Company, Inc.

Re: Status of unpaid invoices.

The invoices shown below are still unpaid beyond our agreed upon terms. Please indicate the status of payment for these invoices in an email reply as soon as possible.

Thank you for your prompt attention.

Invoice 081000000001 dated 8/10/2002 has a balance of 562.90
Invoice 081000000002 dated 8/10/2002 has a balance of 4091.93
Invoice 081000000003 dated 8/10/2002 has a balance of 562.90

Please reply to this email with the status of payment for the invoice(s) shown above or call our office at (714) 555-1234 with any questions regarding the above information.

Thank You

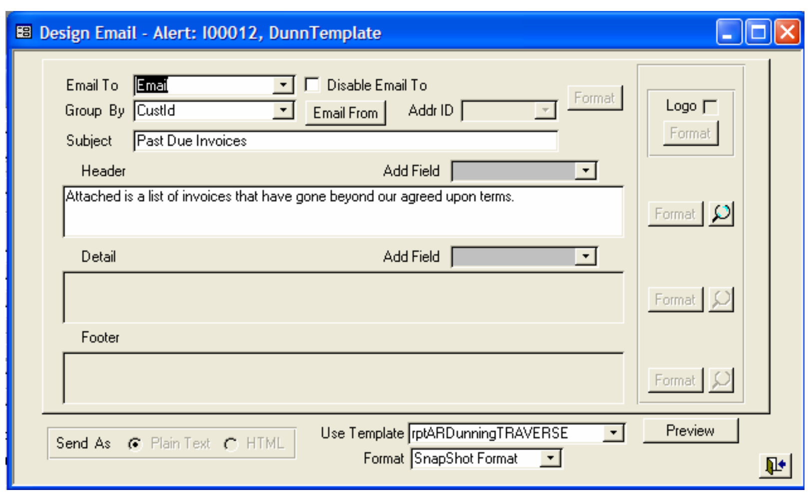
Done

My Computer

Here is a sample of the output generated by the HTML action.

This output can then be sent by email or fax using information from your data source, such as the customer records.

Report templates are MS Access reports that allow us to format the data generated by alert logic in a richer more controlled fashion. Report templates are created and edited by using the Info-Alert "Tool Kit" and are linked to the alert by the use of Actions. Once we create a report template it will take the place of the action Detail and Footer sections and we fill in the remaining information as shown. This information will be what shows on the email or fax and the template will come in as an attachment.



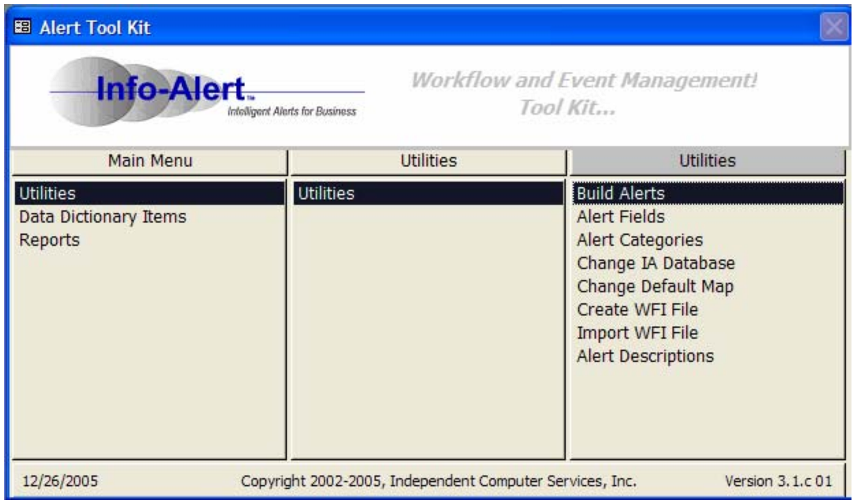
Notice in the action setup shown here we have a template ID entered along with a Format. This tells Info-Alert to send the alert output through the report template identified here.

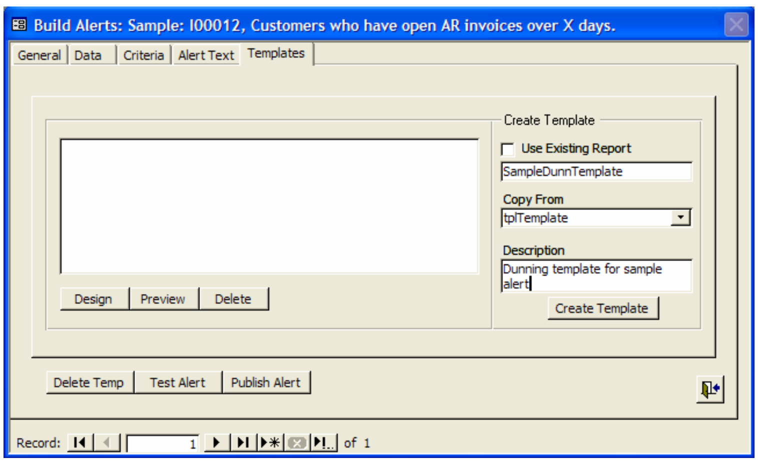
Templates are stored in the InfoAlertTpl.adp program found in your install directory, (Normally c:\program files\infoalert). Templates are created by using the Info-Alert Tool Kit program. When a new template is created it will be associated with a Map ID and Alert ID. It will then be available in the design action section as shown above.

To create new templates use the Tool Kit module and select the "Build Alerts" function as shown here.

Once you select the Build Alerts function enter the Map ID and Alert ID of the alert you wish to associate a template with.

Choose the 'Template' tab to continue.

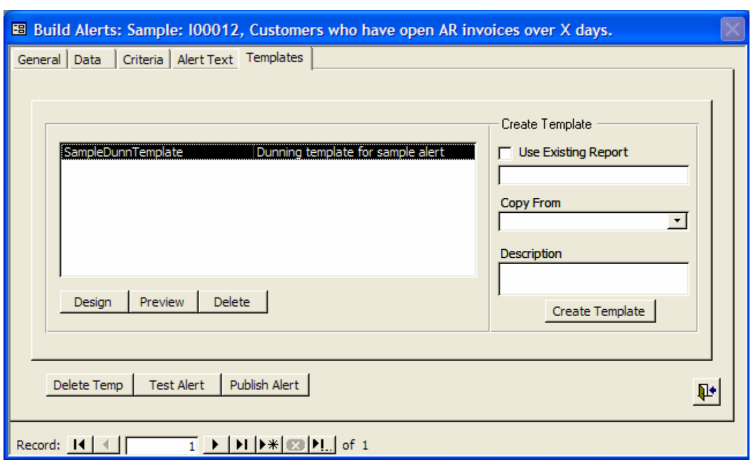




To create a new template, type in a name to reference the new object, here we put a new name of "sampledunnTemplate". You should either copy from an existing similar template or from "tplTemplate".

IMPORTANT*: In order for the template to work correctly with Info-Alert it needs to have some code in it's Report_Open event. "tplTemplate" has this code in it already and is otherwise ready for you to edit.*

Press the "Create Template" button to finish.

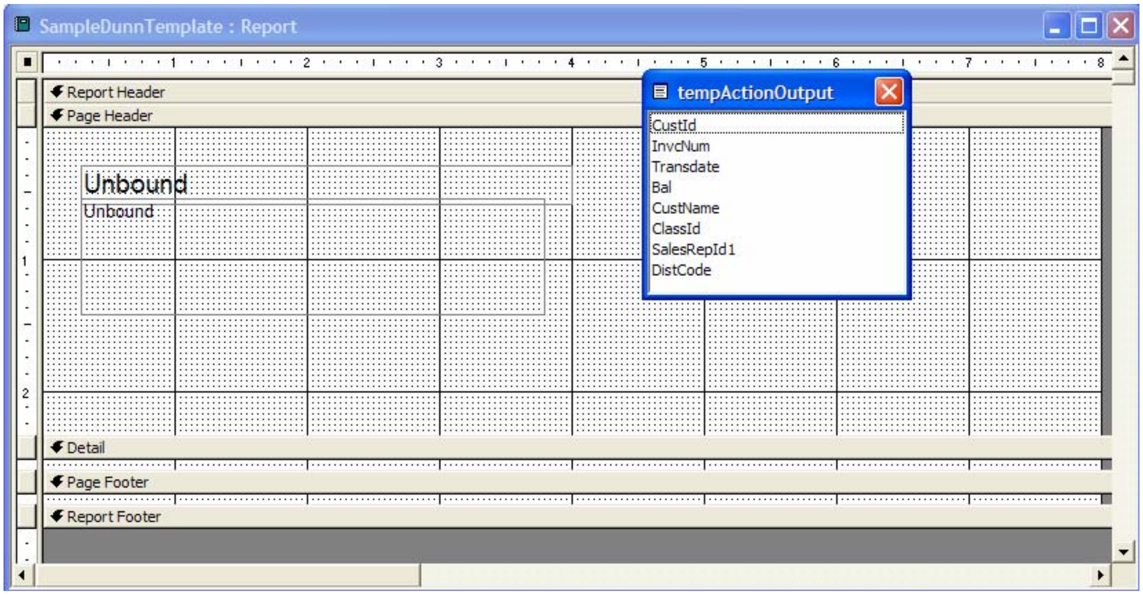


Once created, we can select the new template and design the layout.

NOTE: YOU MUST TEST THE ALERT PRIOR TO BEING ABLE TO DESIGN OR PREVIEW THE TEMPLATE.

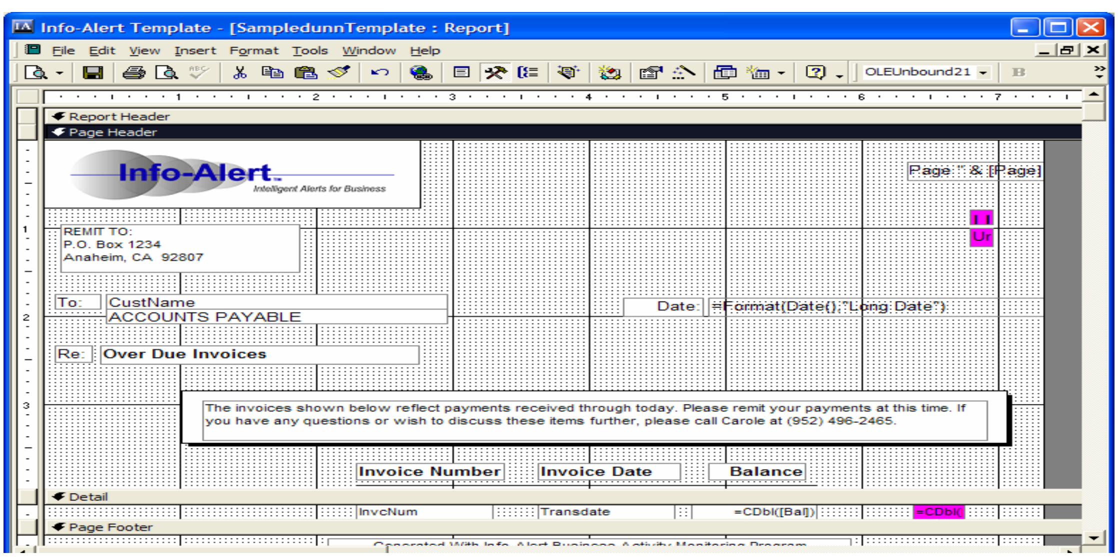
This is because the template (report) is attached to a temp table that gets populated with a field list based on the alert test. The field list available to the report will be based on the last alert tested.

Once there is a successful alert test press the "Design" button.



You will see a default report template. Please note that the field list available to this report should be those returned by the alert. You can begin to place fields and design your report just as you would any other MS Access report.

NOTE: There are two unbound text boxes on the default form. “txtCompName” and “txtCompAddr” if you want to use a company logo for this report you can hide these objects but you should not remove them from the form without removing the code behind the form that references the objects. The Company Name and Address that will show up on this report by default will be pulled from the “Action Address” with an ID of “Template”. You must set this up using the Alert Manager, Actions and Events, Action Address function.



Design the output to meet your needs then save the report. This report template should now be available to be used along with your action, “Design Email” function as shown above.