Info-Alert Administrator's Guide

This guide will walk you through a few simple steps to install, setup and implement your Business Alerts Software. Examples are also provided showing some of the more advanced features available with this product.

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Administrator’s Guide

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Look for the 'IA' icon throughout this guide to alert you to any special notes or suggested tips during the installation and implementation.

Installation Requirements and Components

Installation Requirements

- Install Info-Alert on Servers running Windows Server 2000 or above (with the latest service packs). It may be installed on workstations running Windows 2000 and above but will not be accessible from Remote IA Managers.
- Info-Alert is NOT compatible with Windows 9x or ME.
- Email setup is based on the ability to point to an internal SMTP server or an ISP account that provides access to an external mail server. You may need additional authentication information from your ISP to properly configure IA mail if using an outside email server.
- MS Access 2000 SR1/SP2 or above is required to run Info-Alert. You may install a compatible MS Access run time version, which can be located on the Info-Alert installation CD.

Info-Alert Components

Alert Manager (also known as the IA client), is installed on the server by default during a typical installation. This is the primary user interface that allows for full administration of your alert system. The Alert Manager can additionally be installed on another computer to allow for remote management of alerts if desired.

Alert Server is installed on the server by default during a typical installation. Alert Server is the engine that is scheduled to run hourly or daily to identify, sort, report and take any appropriate actions you may have configured. The Alert Server is scheduled to run daily at a time you specify using your operating systems task scheduler. **See the 'Quick Alert Setup' section of this manual for steps to manually create this task using the 'Windows Scheduled Tasks' utility.**

Tool Kit is a versatile tool allowing for the creation of custom alerts and data maps. Custom data maps allow you to use Info-Alert with many common databases. These custom alerts, data maps, actions, and stored procedures can then be packaged as a WFI file and imported into any fully activated Info-Alert environment for use with many databases.

Info-Alert Installation

Please follow these easy steps to get started:

TIP: Check for any special notes in the 'ReadMe' file found on the 'Info-Alert' CD by clicking the *Installation* button on the 'Main Installation Menu'.

NOTE: The Info-Alert installation may require multiple re-starts of your server based on the current level of your applications. This can add some time to the overall installation. Remember, rebooting a server while users are accessing files may cause data loss or corruption. Have all users log off the server prior to installation.

STEP 1 : Choose your Target Server and Verify Basic Requirements

a. Typically, the 'target' server would be the same server that houses your accounting data but can be any server that has access to the accounting or data server. Info-Alert (IA) Server and Client (Alert Manager) should be installed on servers running Windows 2000 SP2 or above. IA 'Server and Client' can be installed on workstation PCs running Windows 2000 or above, but will not allow the option for remote IA client connections.
b. Info-Alert is a Microsoft Access based application and requires MS Access 2000 or above. If your target server or pc does not have Access 2000 or above, you can install the Access 2000 Runtime from the IA 'Product Installation' CD by clicking the *Installation* button on the 'Main Installation Menu'.
c. You will need to logon to the target server or pc as a user with full admin rights.

STEP 2 : Install 'Info-Alert Server and Client (Alert Manager)'

a. Verify that the installation requirements from Step 1 have been met otherwise the IA installation wizard may be unable to complete the installation.
b. Insert the Info-Alert Installation CD which will automatically start the initial Info-Alert 'Main Installation Menu'. (If IA fails to auto-run, browse the CD ROM drive and double click the setup.exe file from the root directory).
c. The 'Main Installation Menu' provides links to other useful information, such as the IA website, Contact Information, etc. that can be viewed at any time before or after the installation by inserting the CD.
d. Click the *Installation* button on the 'Main Installation Menu'. Hover over the available product installation buttons to view a brief description of each product.
e. If you have determined that MS Access runtime will need to be installed on this machine, click the *MS Access Runtime* button to begin installation. During the installation you may choose an alternative install path. When installation is successful

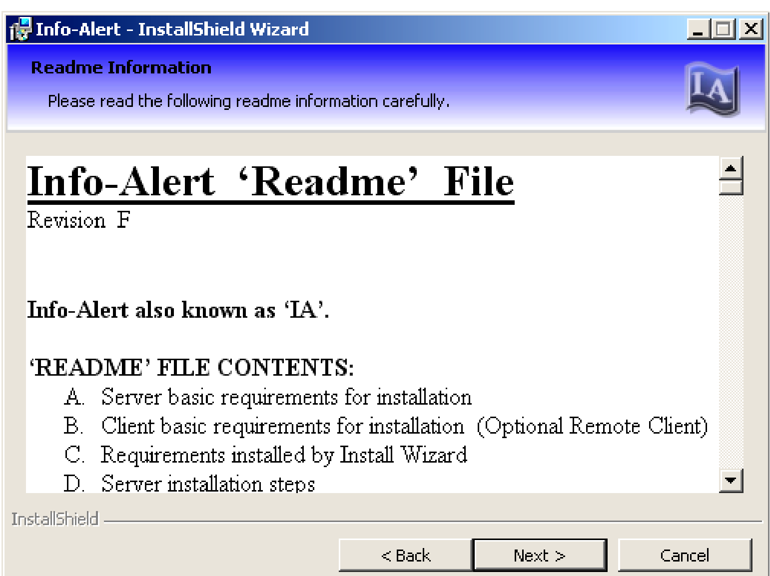
you may be asked to reboot the machine. If so you can re-start the IA installation and navigate back to the ‘Installation’ screen to continue.

f. Click the *Info-Alert Install* button to begin the installation of Info-Alert server which will also install the local ‘Alert Manager’.

g. After viewing the initial welcome screen, click *Next*.

h. After reading and accepting the licensing agreement, click *Next*.

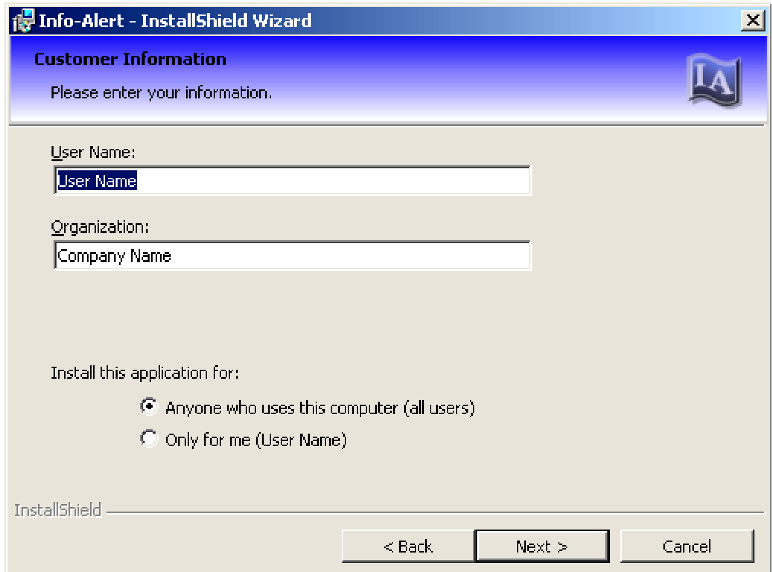
NOTE: Please contact your reseller or ICS with any questions or concerns.

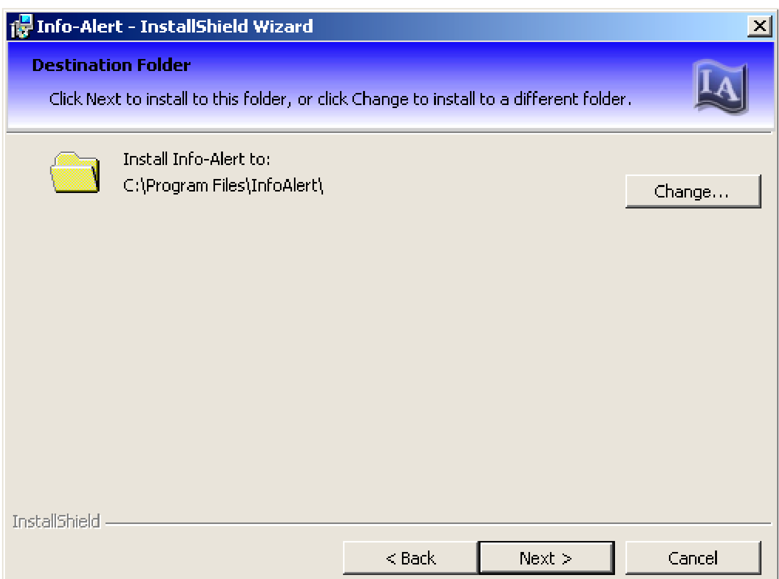


i. Browse the ‘ReadMe’ file for the latest changes to IA Documentation or for a more technical description of the requirements and installation, click *Next* when finished.

j. Enter User and Company information then click *__Next__*.

NOTE: Typically IA would be installed for 'All' users.

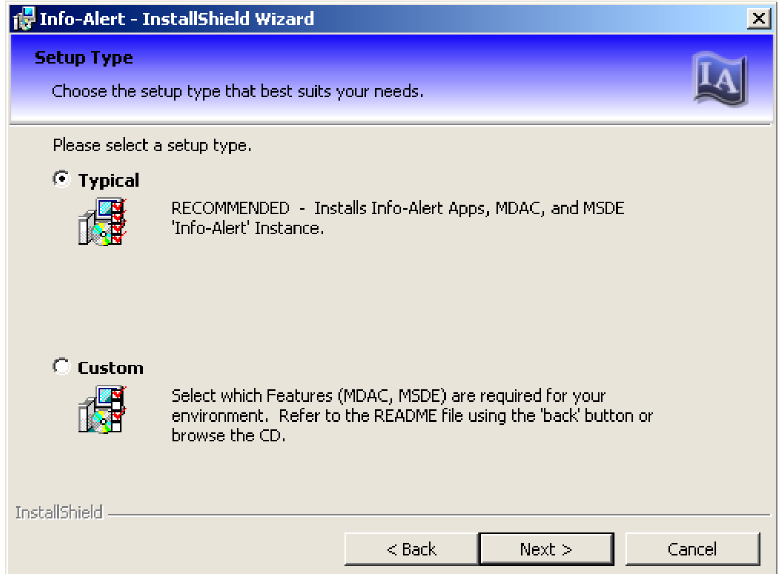




k. You may want to install IA on a drive other than the default, C: to use any free space that may be available. Click the *__Change__* button to browse the available drives, or click *__Next__* to accept the default location: **__'C:\Program Files\InfoAlert\'__**.

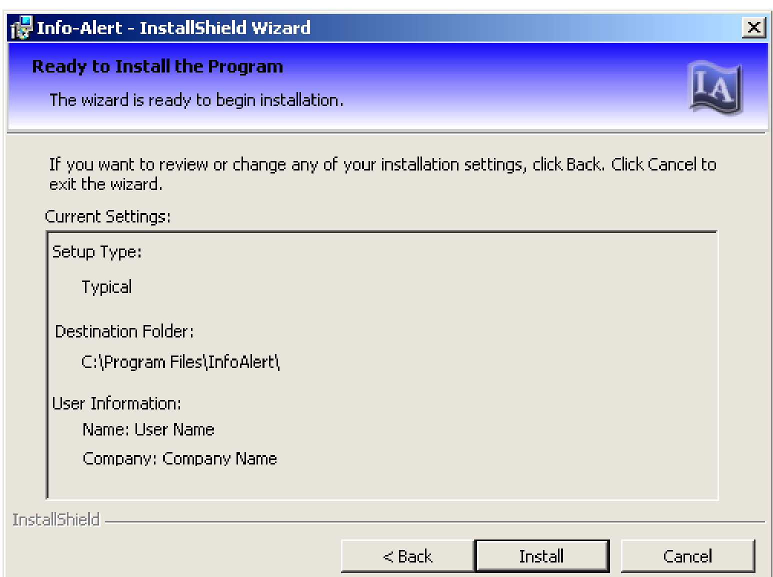
NOTE: IA SQL desktop (MSDE) will always be installed to 'C:\Program Files\Microsoft SQL Server\MSSQL$INFOALERT'.

l. Here you have the option to choose a Typical or Custom installation based on whether you want to use a separate InfoAlert instance of Microsoft SQL Desktop 2000 with SP3 (MSDE) or use an existing SQL 2000 server to store the IA database.



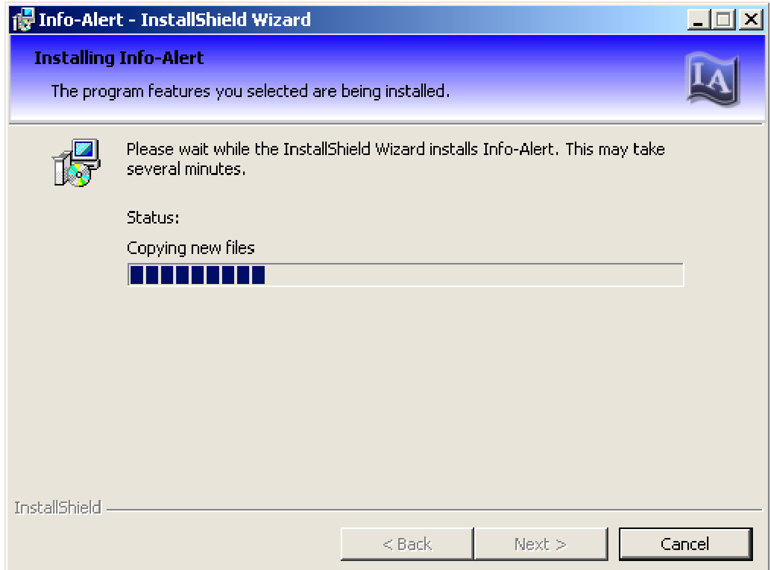
NOTE: Even if you have a full instance of SQL Server 2000 running, we <u>highly</u> recommend using the separate MSDE 2000 SP3 instance to allow for product isolation and ease of installation or removal.

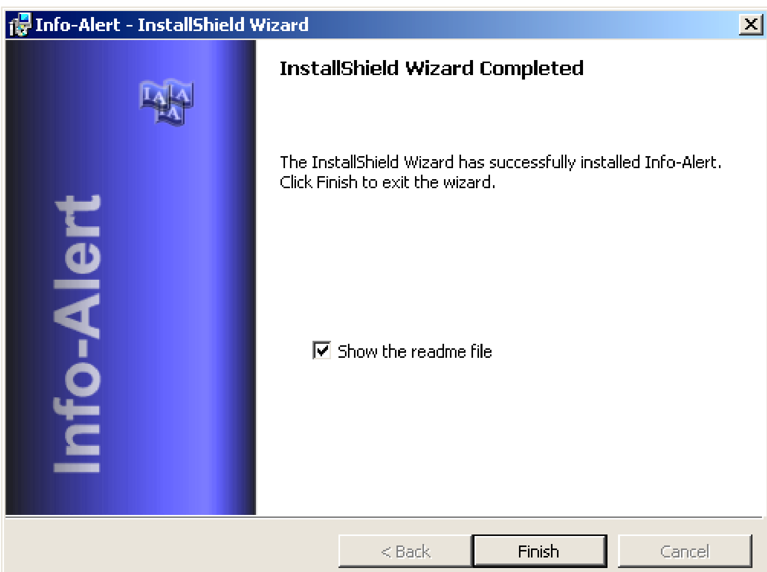
m. Click on the <u>*Typical*</u> button to install IA with the recommended MSDE instance of InfoAlert or the <u>*Custom*</u> button to install without MSDE 2000 instance. click <u>*Next*</u>.



n. View the install summary, using the <u>*Back*</u> button to make any changes. Click <u>*Install*</u>.

o. Please be patient during the following 'Installation Progress' screen as Info-Alert may take several minutes to install depending on your machine's resources.





p. At the 'Completion Screen' indicate whether you want to view the ReadMe file again and click 'Finish'.

NOTE: The installation of some IA components may require a reboot after completion. If this is the case, a message will appear prompting you for this reboot. You can close the IA Installation Menus and select '*Yes'* to reboot.

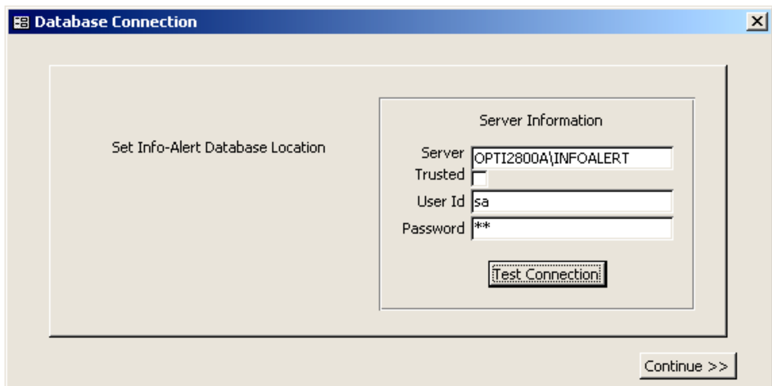
q. Continue with **Step 3** after restart and run the 'First Time' Wizard to initialize Info-Alert.

IMPORTANT NOTE:

After a successful installation you will find the Info-Alert icon on your desktop. LAUNCH THIS SHORTCUT TO CONTINUE THE INSTALLATION AND THE 'FIRST TIME' WIZARD.

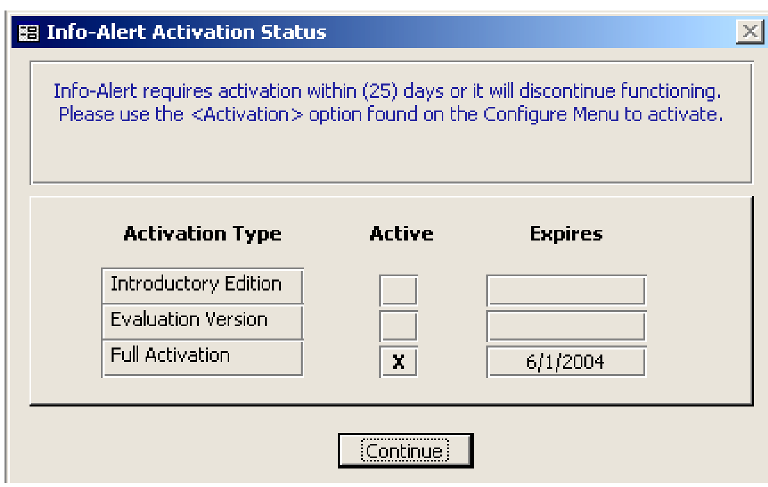
STEP 3 : Run the 'First Time' Wizard

a. Click the new 'Info-Alert' icon on your desktop to initiate the 'First Time' wizard.



b. If MSDE was installed, as recommended during the install wizard, all of the logon and database information will be entered by default allowing you to simply select *Continue*. Otherwise, fill in the required Server name, User Id and Password information needed for your existing SQL server before selecting *Continue*.

c. At this point the 'First Time' wizard will start the IA SQL server if installed and attach the IA database making it ready for you to begin configuring your alerts.



d. The 'Activation Status' form now appears. By default Info-Alert is installed in a 'Temporary' mode that allows for a 30 day grace period to activate IA.

e. Click *Continue* and use IA in the 'Temporary' mode until ready to activate.

f. The IA 'First Time' wizard now presents you with the Info-alert 'Main Menu'. You are now ready to start configuring your alerts!

g. Info-Alert Manager is now running in a full 'Evaluation' mode that will be valid for a 30 day time frame. The Info-Alert tool Kit will also be available in Eval mode but will be limited to the included sample data map. To activate Info-Alert at any time throughout the 30 days, just choose *Activation* from the 'Configuration Options' menu and follow the few easy steps listed in the 'Activation' section of this manual.

NOTE: If you have a WFI file available for import you should do this prior to activating your Info-Alert application.

NOTE: If this activation sequence is not completed prior to the 30-day grace period, Info-Alert will no longer function. If this occurs, use the *Activate* button from within the 'Activation' screen then follow the instructions to activate for any of the available options.

TIP: While you are in the 'Evaluation' mode, you will be reminded of the remaining days every time you enter the Info-Alert Manager**.**

NOTE: Subsequent Alert Manager logons will default to**: User Id: sa** with the **Password: IA You can change the password from the 'Administrative Info' screen.**

Move to 'Step 4' to Continue with the 'Quick Alert Setup' Guide

Remote 'Client Only' installation (optional)

NOTE: The Info-Alert Client install should be used only where the need for an ADDITIONAL client is desired. By default an 'Info-Alert Client' is installed with the 'Info-Alert Server' and allows for full administration and setup.

a. We recommend installing the 'Remote Client' application on a pc running Windows 2000 or above with the latest service packs. Like the Server application, the 'Remote Client' application must have MS Access 2000 or above to run. You can install Access 2000 runtime from the Info-Alert Installation CD 'Install Products' screen.
b. You will need to logon to the target pc as a user with full local administrative rights.
c. Verify the installation requirements from 'Step 1' have been met; otherwise the Info-Alert installation wizard may be unable to complete installation.
d. Insert the 'Product Installation CD', which will automatically start the initial Info-Alert 'Main Installation Menu' screen. (If IA fails to auto-run, browse the CD ROM drive and double click the setup.exe from the root directory). Select the 'Install Products' button, select 'Remote Client', and follow the install wizard prompts.
e. At the 'Program Destination' screen you can choose an alternate location for the program install. Default is "C:\Program Files\InfoAlert"
f. At the 'Setup' screen you may choose a 'Typical' install, which is <u>recommended</u>, and will install the Info-Alert Client application with any required MDAC updates; or choose custom to install IA without automatic installation of MDAC.
g. Click <u>*Finish*</u> when you receive the completion screen indicating a successful installation.
h. When launching the 'Remote Client' application for the first time, you will have to provide the logon information from the IA Server install. **Server: *servername*\infoalert User Id: *sa* Password: *IA*** (Where *servername* is the name of the Info-Alert server.) NOTE: If Info-Alert was installed to an existing SQL server, use the appropriate logon credentials.
i. When the proper logon has been authenticated the IA Main Menu will appear allowing you to remotely monitor and manage your alerts much like the IA Server/Client install.
j. Activate your 'Client Only' using the same steps as with the server install of 'Alert Manager'. Each client must be activated separately for each PC.

NOTE*:* All Scheduling and printer designations must be done on the IA Server and cannot be managed from the remote client.

Quick Alert Setup

STEP 4 : Continue with the Setup and Scheduling of Alerts

Data Sources:

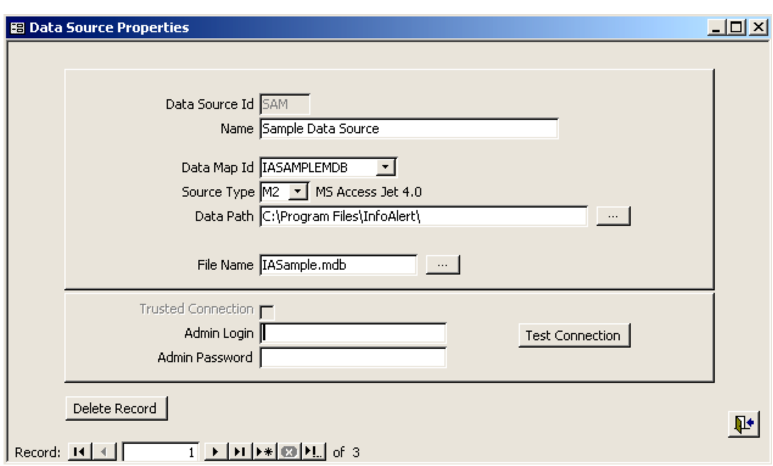
A Data Source must be set up to tell Info-Alert where your data is located. This is normally the server name or directory where your Accounting data is located but could be other data you wish to be alerted on. If you are ready to connect to your specific accounting data you will need to have an IA data map installed. A 'custom' data map can be created using the IA Tool Kit but more often your accounting software manufacturer has a 'Work Flow Intelligence' (WFI) file ready to install. This WFI file will create the required data map and make available all of the alerts developed for your distinctive accounting package.

NOTE: If you have a WFI file for your database you should import it *prior* to setting up a data source. See the 'WFI File Creation and Import' section of this manual for more details.

TIP: You can create custom data maps to many different databases and configure your own alerts using the 'IA Tool Kit'. Ask your accounting reseller for more information.

NOTE: Although there are multiple data source types available in IA, this example will be connecting to an Access database. If you have multiple companies in your accounting software that you wish to be alerted on you will need to set up a separate data source record for each company. (Normally each company would have its own directory or database name).

a. From the Main Menu, choose 'Configuration', 'Configuration Options', 'Data Sources' to configure the data you want IA to alert on.
b. Fill in the 'Data Source ID' and 'Name' or description for this source. (Note: you may want to use a company Id as the data source Id)
c. Choose a 'Data Map ID' using the pull down based on your product.
d. Choose a 'Source Type' based on your data platform using the pull-down provided. This will change the remaining data source headings as required for this data type.



e. When connecting to a Microsoft Access database or Excel data, enter the UNC path to your data file in 'Data Path' (Sample: \\servername\database\data) and the database name in the 'File Name'. Provide Admin Logon, and Admin Password as needed for your source database.

NOTE: If using a source type of S1 then fill in Server Name with the SQL server that hosts your data and the database name. IA will need full access to the data so the use of the SQL 'sa' account is typical for a SQL database. You may also use the Trusted Connection if applicable.

f. Use the *Test Connection* button to test the ability for IA to connect to your data**.** ***YOU MUST GET A SUCCESSFUL CONNECTION FOR INFO-ALERT TO WORK PROPERLY***.

NOTE: You should create a 'Data Source' record for every database that IA will use.

Report Setup:

g. After you have all data sources configured, exit the Data Source form to return to the 'Configuration Options Menu'. Choose 'Report Groups' to show the pre-configured reports.

h. Use the pull-down on the *Printer* column to choose an actual printer from the list. (See the 'Configuration Options' section of this manual for more details).

Activation:

i. If you did not activate Info-Alert during the installation process, you have a 30-day grace period and can activate later. You can use the 'Configuration Options', 'Activation' option from the menu to officially activate your Info-Alert installation.

Administrative Info:

j. From the 'Configuration Options Menu' choose 'Administrative Info' to allow for various Admin tasks and setups.

k. Click the *Email Setup* tab and enter the name or IP address of your in-house SMTP (Email) Server. Use the *Send Test Email* button to verify access. See the 'Configure Options' section of this manual for more details.

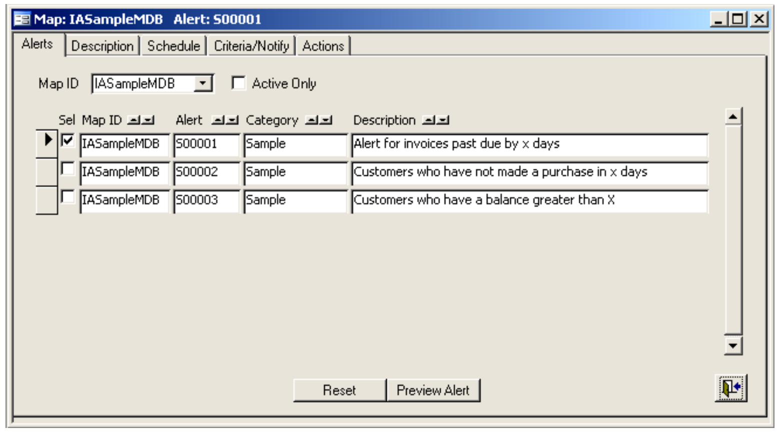
NOTE: For detailed Activation, Email and Fax setup steps see the 'Configuration Options' section of this manual.

l. Click the *Misc* tab and choose the *Clear Flags* button only when you need to clear the logs, history and 'Take Action' data. This utility is handy for troubleshooting and testing the Info-Alert Server application and would typically be used only for this purpose.

Select Alerts

<u>Alerts Tab:</u>

m. From the Main Menu choose 'Alerts'-'Alerts' - 'Select Alerts' to view a current list of available alerts.



n. Select the appropriate 'Map Id' and review the list to select an alert that might fit your business needs by placing a *<u>Check</u>* in the box to the left of the Alert. This will set this alert for processing by the Info-Alert Server. Un-checking this 'Select' column will place this alert in a 'Preview' only state but will retain any setup parameters you might have set.

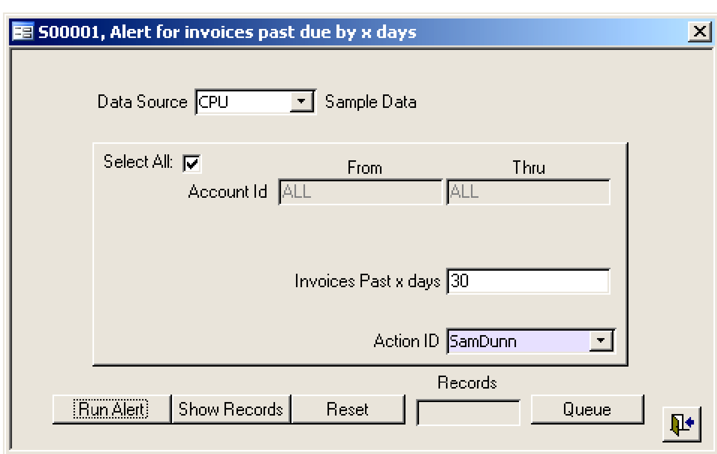
TIP: Click the 'Sel' heading to sort by 'Checked' alerts. Sort the other columns as desired by using the 'Up/Down' arrows at the top of the needed column.

<u>Description Tab:</u>

o. Use this tab to view a detailed description of every alert. You can also see what date and time this alert had last run.

Preview Alerts - (Manually Run and Test Alerts):

p. Click the *<u>Preview Alert</u>* button from the 'Alerts' tab to launch the 'Alert Test Wizard'. Fill-in the needed parameters to test this alert for connectivity and access to your selected data.



q. Select the *<u>Run Alert</u>* button and wait for the 'Data Generated' message. Choose the *<u>Show Records</u>* button to preview and print if desired.

r. You may now continue with the following steps to set this alert with the same criteria to run automatically based on your Info-Alert Server Scheduler.

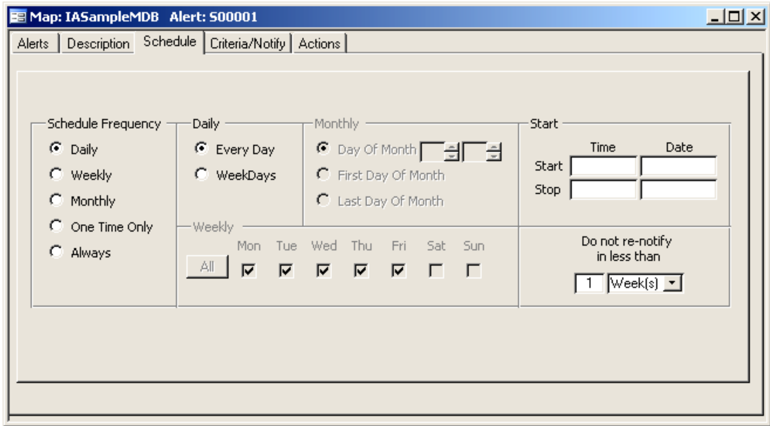
s. Use the 'Queue' button to quickly move to the 'Submit Actions' form where you can view the queue for any Action emails or faxes that were generated in your test.

READY TO CONFIGURE YOUR ALERTS

Alert Setup

<u>Schedule Tab:</u>

a. Use the *<u>Schedule</u>* tab to set how often you would like this alert to run.

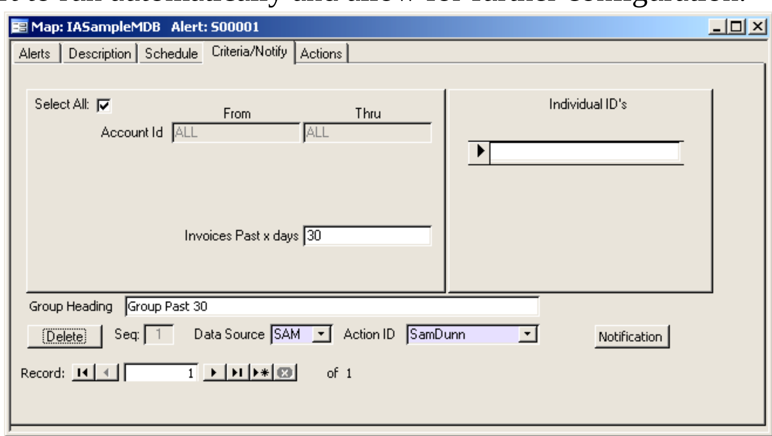


b. Select the amount of time you want to pass before being alerted on the same record using the *<u>Do not re-notify</u>* dialog box.

c. Select the actual days of the week and frequency you would like to be alerted on a particular alert. EXAMPLE: You have an alert that would meet your needs but only wanted it to run every Friday.

<u>Criteria/Notify Tab:</u>

d. From the ‘Select Alerts’ screen, click the check box next to the alert you just tested which will select this alert to run automatically and allow for further configuration.



e. Select the Criteria/Notify tab to set one or more specific parameter Groups that this alert will use to provide notification to those persons you choose.

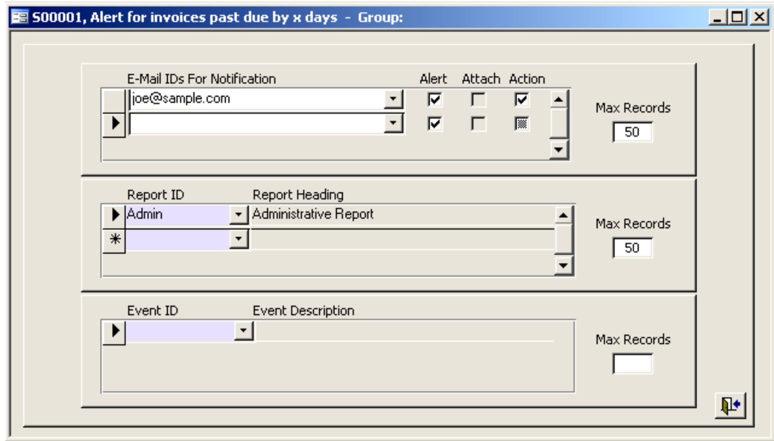
f. Here, you are able to provide multiple sets of criteria to alert on. Our example ‘Selects All’ customers using alert S00001. You can change the fields used for criteria by using the ‘Alert Field Selections’ option on the ‘Configure Options’ menu. (You may also choose specific customers using the ‘Individual ID’s’ area)

g. Enter number of days ‘Invoices Past x Days’ to further limit your criteria.

h. Select a *<u>Data Source</u>* from the drop down based on the ‘Data Sources’ you setup previously in this guide to be used as the source of data for this Alert.

NOTE: You must make entries in both the ‘Invoices past x days’ and ‘Data Source’ to complete a valid alert setup.

Notification Screen:



i. Choose the *Notification* button to setup how and who will be notified of this specific alert.

j. If your environment provides an available email server, enter an email ID of those you want notified of this alert by email.

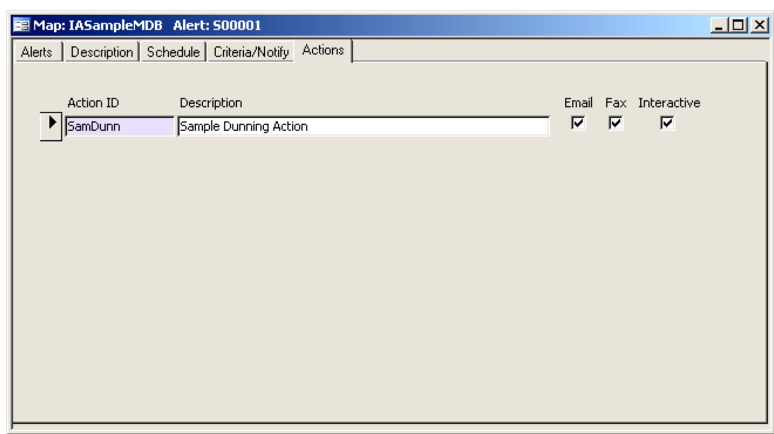
k. For a printed output of the alert enter a report ID from the drop down list that was previously setup in the 'Configuration Options', 'Define Reports' to point to a particular printer.

l. Choose a 'Max Records' amount to limit the number of records that show up on your output. This entry will prevent the potential for a 'run-away' notification in the event of non-specific alert criteria.

NOTE: 'Event ID' is for advanced users and is explained later in this manual.

m. Close the *Notification* form and setup any additional criteria Groups for this same alert. These additional groups will show as multiple records or sequences for the same alert on the 'Alert Setup' screen. When finished, return to the 'Select Alerts' screen and choose any additional alerts following these same steps to setup.

Actions Tab:



n. Use the Actions Tab as a quick way to view and manage any actions that may be associated with a particular alert. As always with IA, you can 'drill down' when you see the blue background within a field just as you see here with the 'Action Id'. The grayed check boxes are shown for a quick status of the email or fax settings in a particular action and the 'Interactive' check box can be used to actually update the action directly from this screen. This tab will come in handy during initial testing and setup of your alert actions.

Info-Alert is now ready:

- You are now ready to close all Info-Alert forms, sit back and get ready to take better control of your business! Your alerts will begin appearing based on the time you set the 'Alert Scheduler' to run and on your specific criteria setup in your individual alerts.

IMPORTANT:

In addition to the individual alert scheduling completed above, you will need to set up a 'Scheduled Task' to run the Info-Alert Server using your operating systems task scheduler. The 'Scheduled Task' utility can be found in the following locations based upon your computers' operating system:

Windows NT4 - Click on 'My Computer and select 'Scheduled Tasks'.
Windows 2000\XP\2003 - Click on 'Start-Settings-Control Panel' select 'Scheduled Tasks'.

Follow the prompts from the 'Add Schedule Task' wizard and when asked which program to run, use the browse button to locate the **'InfoAlertSvr.ade'** file from your Info-Alert install directory, (Typically C:\Program Files\InfoAlert). When asked for scheduling information, choose '**Daily'** and select a time of day, or multiple times a day, depending on when you would like the Info-Alert Server to process your selected alerts, (Typically set to **10:30 pm** or a time of day with minimal activity, but can also be set to run frequently throughout the day). **<u>Provide a username and password with local administrative rights.</u>**

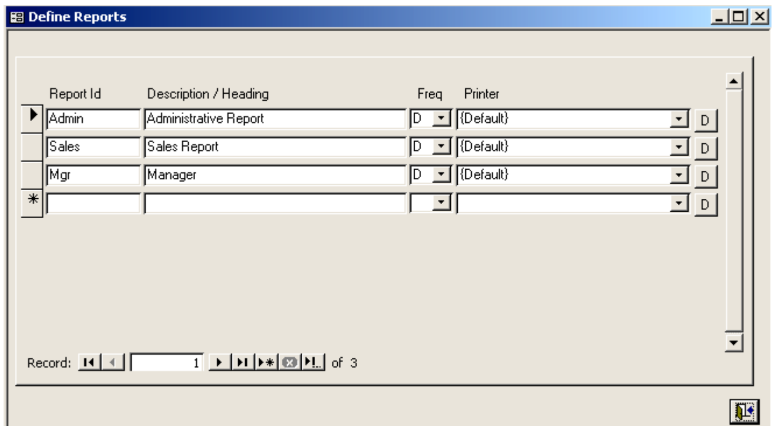
<u>This step needs to be done on the machine that is running the Info-Alert server (InfoAlertsvr.ade), only.</u>

Configuration Options

MAIN MENU - 'Configuration Options'

Report Setup:

After you have all your data sources configured, exit the Data Source Properties form to return to the 'Configuration Options Menu'. Choose 'Report Groups' to show the pre-configured reports.



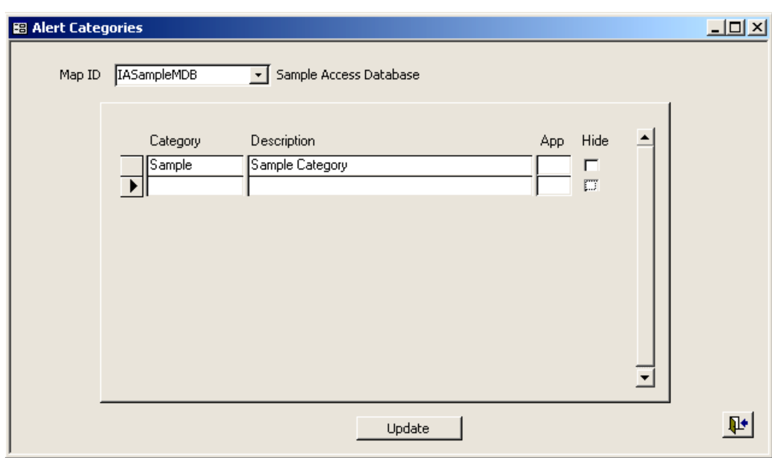
Use the pull-down on the *Printer* column to choose an actual printer from the list. If a printer you wish to use does not show on this list, you must use the Windows Printers folder to add the required shared printer to Windows which in turn will make it available to Info-Alert.

Note: Report Groups can only be configured from your server install of Info-Alert, any remote clients will not have access to this information for maintenance.

Exit the 'Report Groups' form to return to the 'Configuration Options Menu'.

Alert Categories:

Use the 'Alert Categories' function to add or change categories used to group alerts. Categories allow you to display your alerts by logical groups when selecting or configuring.



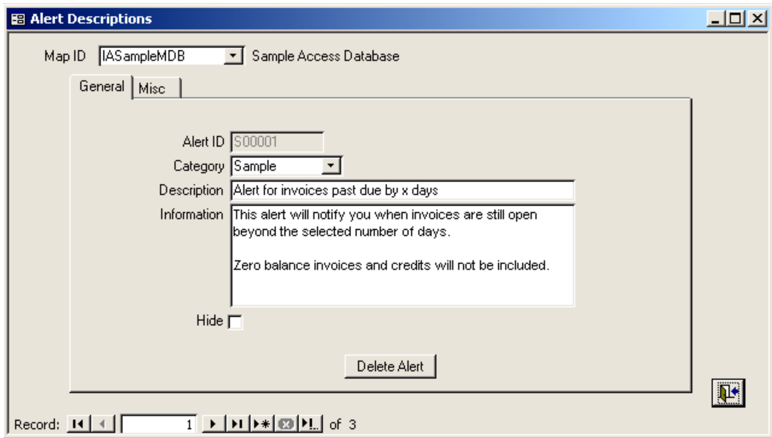
You can hide alerts within a given category if you are not using those alerts in your business. Check the *Hide* checkbox for the groups you wish to hide then press the *Update* button.

Reverse the process to unhide alert groups.

You can add additional alert categories or change existing descriptions at any time.

Alert Descriptions:

You can change an alerts assigned category or adjust the summary description by using the 'Alert Descriptions' function found under the 'Alerts' menu. The summary description is used to identify an alert throughout the application.



A detailed description can be assigned to each alert to better describe how it should be used. Enter or change this information at any time to provide additional information to the user.

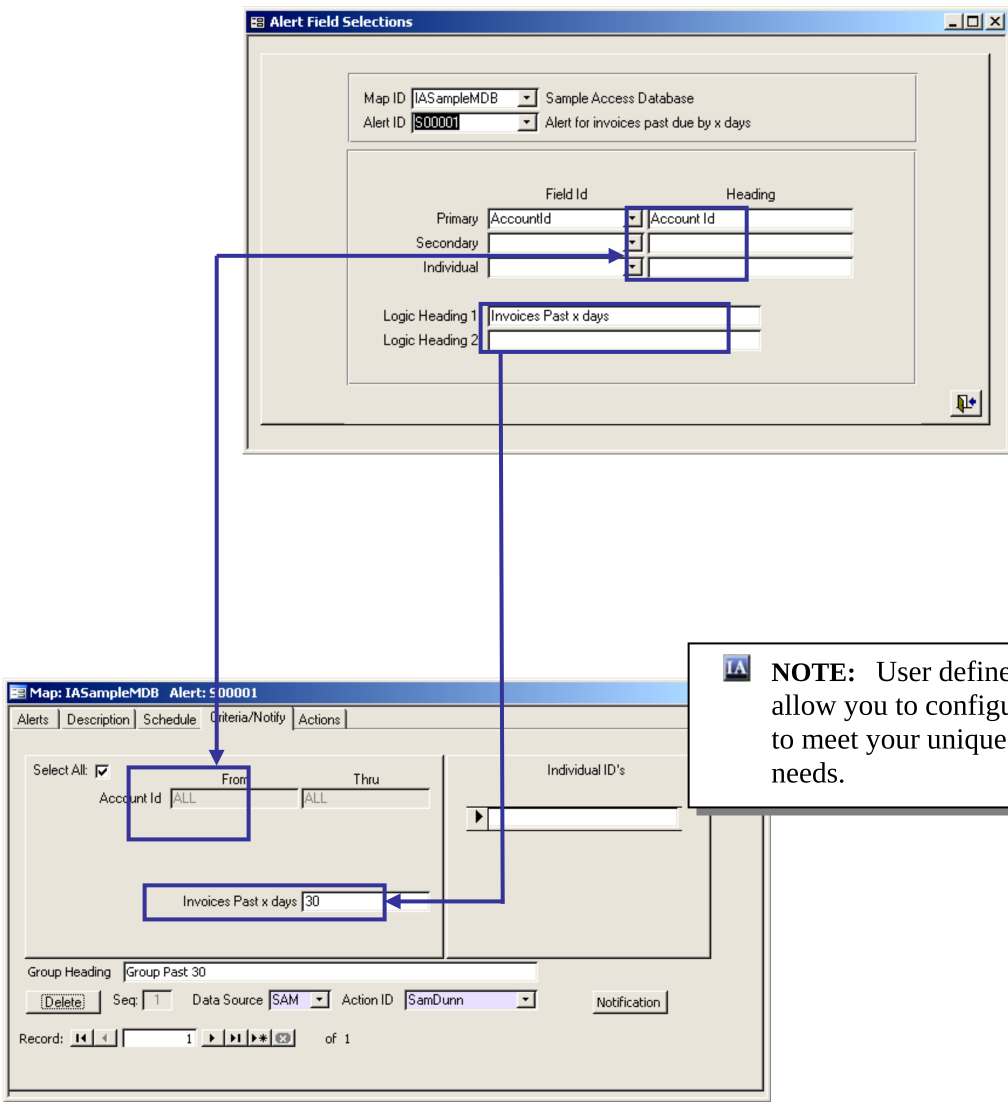
TIP: The *MISC* tab can be used in the same way as the *Schedule* tab on the 'Alert Setup' screen.

To hide individual alerts you may check the *Hide* checkbox on this screen. Note: To hide groups of alerts use the 'Alert Categories' function shown above.

To delete an alert use the *Delete Alert* button on this screen. Note: All configuration information attached to this alert will be deleted.

Alert Field Selections:

This function allows you to change the fields and/or field headings used to set alert criteria. For example in the screen that follows alert S00001 provides for an 'Account Id' selection when you configure your alert.

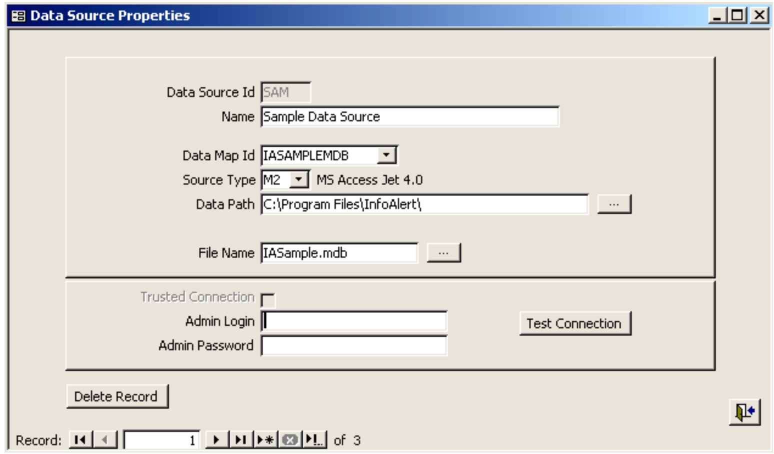


NOTE: User defined fields allow you to configure alerts to meet your unique business needs.

If you do not use 'Account Id' in your business you may change the selection criteria to another field from your database, for example 'Distribution Code'. The Headings entered here will show on the criteria screen of your alert as shown above.

Data Sources:

Data sources are used to provide Info-Alert information on the source of the data it will alert on. Since Info-Alert can be pointed to many types of data it needs to know where it's located and how to make a connection.



Data Source Id:
Enter a 1 to 3 character ID that will uniquely identify this source.

Name:
Enter a description for this source of data.

Data Map Id:
Using the pull down arrow select a Data Map that is used with this source of data.

A Data Map is created for each type of database that you will use with Info-Alert. It defines the structure of the data, i.e. tables and fields that are available for alerts. If the source of the data you are connecting to is one of the pre-defined packages there will be a data map already defined, otherwise a custom data map can be created with the Info-Alert "Tool Kit" program.

Source Type:
From the pull down arrow select the type of data you will be connecting to with this data source, "MS SQL Server", "MS Access", "MS Excel", etc. If you don't see the type of data displayed in the pull down box you can select "DS" to point to a DSN that was set up on your workstation with Microsoft's administrative tools.

NOTE: Since different types of data require unique information, the fields and headings that follow the Source Type will change based on the type entered. The following is based on a MS Access data source.

Data Path:
Enter the file path of the MS Access database.

File Name:
Enter the database name that holds your source data.

Trusted Connection:
For SQL Server connections use the trusted connection check box if your SQL security model is set to trust your operating system logins. You will not be required to enter an admin login or password.

Admin Login:
If you are using SQL Server security, enter an administrative login.

Admin Password:
If you are using SQL Server security, enter an administrative password.

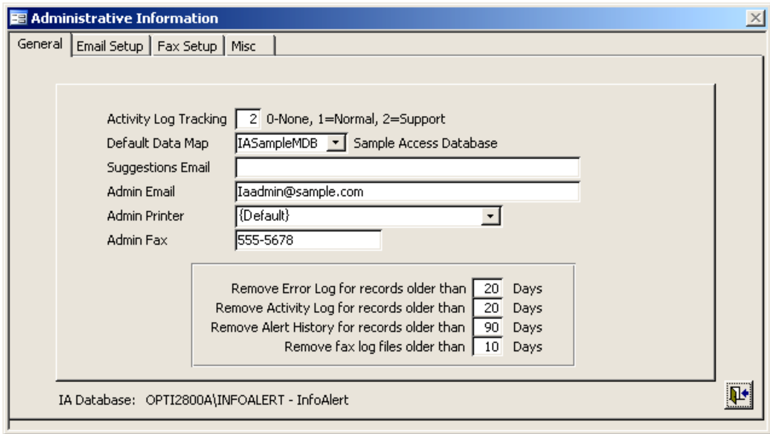
Use the *Test Connection* button to verify that you can connect to the data source.

NOTE: You must be able to create a successful connection to your data source prior to using it in any other Info-Alert function.

Administrative Information:

The ‘Administrative Information’ screen allows you to configure various options used during alert processing. Please review the following configuration options prior to making any changes to the default settings.

‘GENERAL’ TAB:



Activity Log Tracking:
This setting is used to identify the level of detail that will be written to the Activity Log and show up on the Activity Report. Normally you would want to leave this at a “2” to track the most detail.

Each time the Info-Alert server program runs automatically it will create entries in the Activity Log identifying alerts that ran and records produced. You can review the Activity Log after activating new alerts to verify they were included in the most recent processing.

Default Data Map:
The default data map tells Info-Alert what set of alerts to display as a default when scheduling and configuring.

Suggestions Email:
This entry is for an email address that suggestions will be emailed to if any are created. Suggestions may be entered using the ‘Alert Suggestions’ option under the ‘Configure Options’ menu. New suggestions for product enhancements or additional alerts that you would like to see will be sent to the “Suggestions Email Address” during the next automated server process. The default is info@infoalert.com.

Admin Email:
This entry is for an email address that Info-Alert will use to send administrative alerts that pertain to Info-Alert processing.

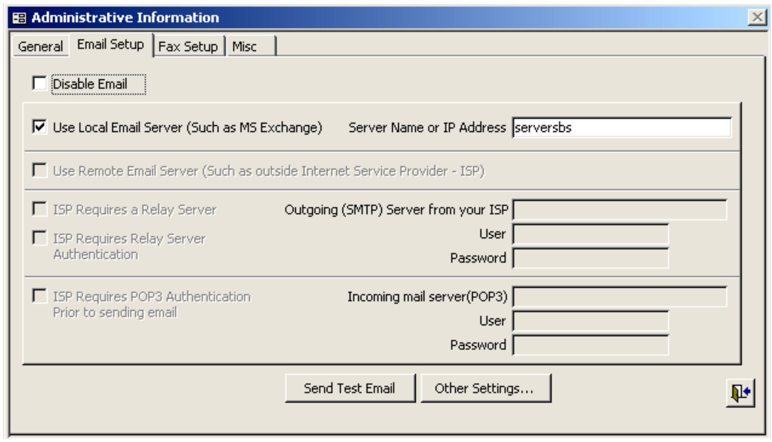
Admin Printer & Admin Fax:

These entries are for a default printer and/or fax number that Info-Alert will use to print administrative alerts that pertain to Info-Alert processing.

Automatic Purge Functions:

Info-Alert uses the automatic purge settings to keep its logs and history files clean. Use the default settings or adjust to keep additional history. Alert History must be held for at least 90 days to allow for alert re-notify functions.

<u>'EMAIL SETUP' TAB:</u>



Use the *<u>Email Setup</u>* tab to provide Info-Alert with settings required to point to your email server.

Disable Email:

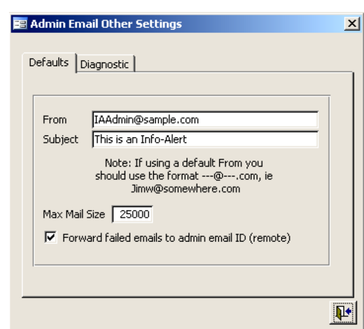
Check this box to disable the email generation of alerts. Use this checkbox if you do not have email capability or if your email server is not available for any length of time. This checkbox is checked by default

Local Email Server:

Enter an SMTP server name or IP address for your local email server.

Remote Email Server:

Use the other options to configure a "Remote Email Server" using required authentication per your ISP. Using this transport, always start off by using the least amount of info as possible. Example: Put a check in the 'Use Remote Email server..' area and run the 'Test Email' utility. If this is successful, you are done. If not, you can then add in the name of your 'outgoing mail' server and test again. Keep adding the required info until you are able to successfully test.



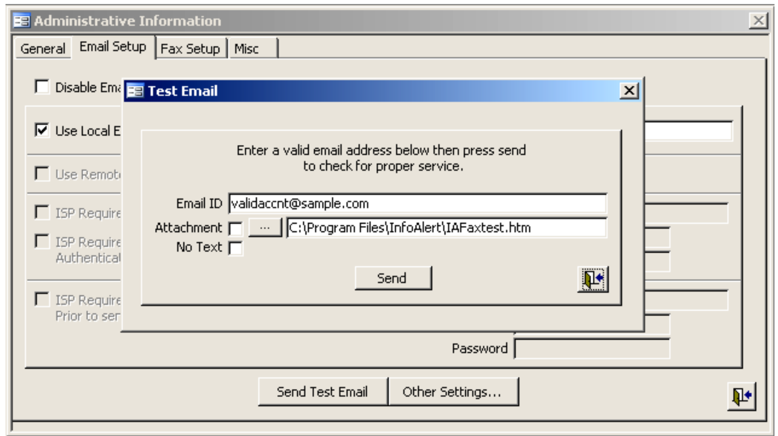
Other Settings:

Use the *<u>Defaults</u>* tab to set a valid email address to be used by Info-Alert as a 'From' address. Use the 'Subject' line, if desired, as you would any other email message.

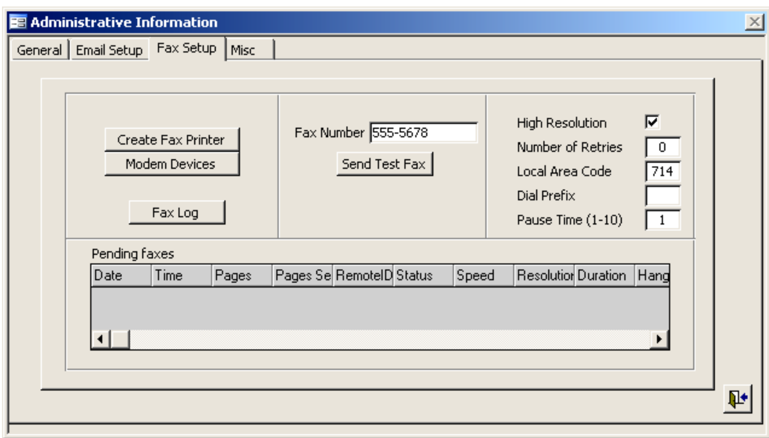
NOTE: A valid 'From' address is required now by many mail servers to help protect against Spam.

Send Test Email:

Always test your email settings after making any changes or adjustments. Enter a known good email address that can be easily verified. If there are problems, use the troubleshooting check boxes to allow for an attachment to be sent with the test mail or for there to be no text sent in the email body.

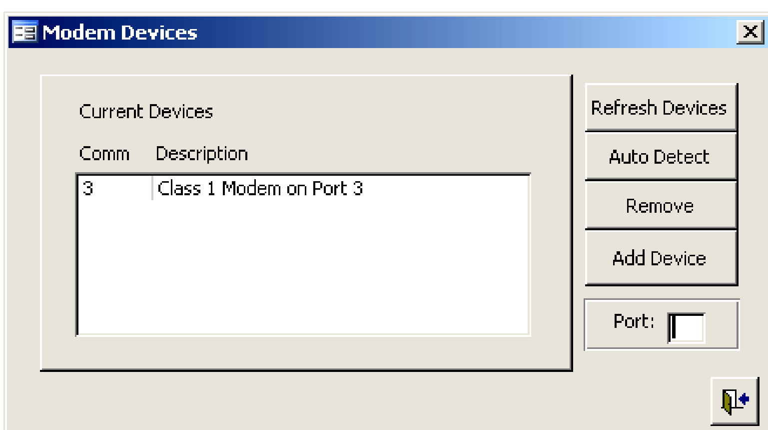


<u>‘FAX SETUP’ TAB:</u>



This tab allows for the setup and testing of Info-Alerts Fax Utility, which is installed by default with IA. This Fax Utility is NOT installed with the ‘IA Client Only’ option and must be administered from the IA Server.

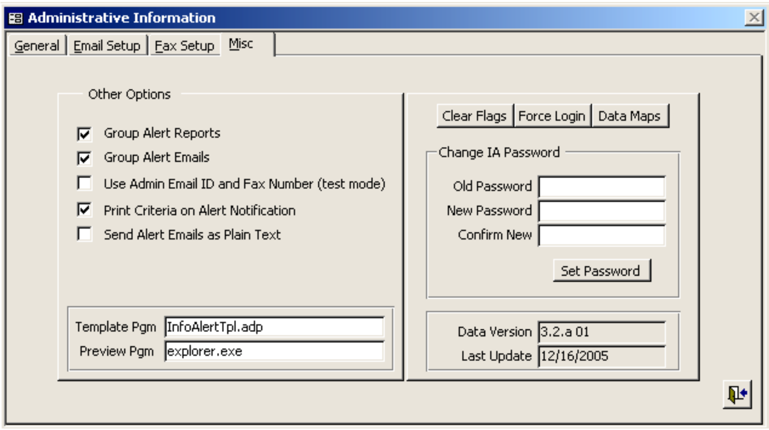
Choose the ‘Modem Devices’ button to find and set the fax modem.



1. Use the ‘Auto Detect’ button to have IA automatically detect your fax modem
2. Use the ‘Port’ area to manually input which port the fax modem is using and then choose ‘Add Device’ to manually add the fax modem to the list. You may have more than one modem installed on your computer but only the ones shown here in the list will be available for Info-Alert faxing.

If you can’t auto detect or manually add a fax modem here you will be unable to utilize faxing within Info-Alert.

<u>'MISC' TAB:</u>



This tab allows for other miscellaneous options that Info-Alert will use.

For example if you are testing a new alert and need to run it multiple times you will want to clear the activity logs between running alerts with the "Clear Flags" button. This is very handy during your initial alert setup testing.

Group Alert Reports:
This checkbox should be checked to group multiple alerts for an individual onto one report. If this box is unchecked an individual report will be printed for each alert. This checkbox is checked by default.

Group Alert Emails:
This checkbox should be checked to group multiple alerts to an individual onto one email. If this box is unchecked an individual email will be sent for each alert. This checkbox is checked by default.

Use admin email and fax:
Use this option to override any email or fax ID's generated in action output. All emails and/or faxes will be directed to the designated 'admin' address or admin fax number while testing your action outputs. Always uncheck this option when you are ready to run 'live'.

Print Criteria on Alert Notification:
This option will allow for the printing of your alert criteria on alert notifications. This may or may not be used, based on your personal preferences.

Send Alert Emails as Plain Text:
This option will allow for sending the alert emails in a 'plain text' format if you have recipients that are unable to open the files in IA's other formats.

Clear Flags:
The <u>*Clear Flags*</u> button is used to clear alert history, pending emails, and reset error and activity logs. This function should only be use for testing purposes.

Force Login:
Use this button to force a login screen when opening the IA Manager after you have selected to 'Save' a login authentication during the logon process.

Data Maps:
Use this button to quickly open the 'Data Maps' screen allowing for review or adjustments**.**

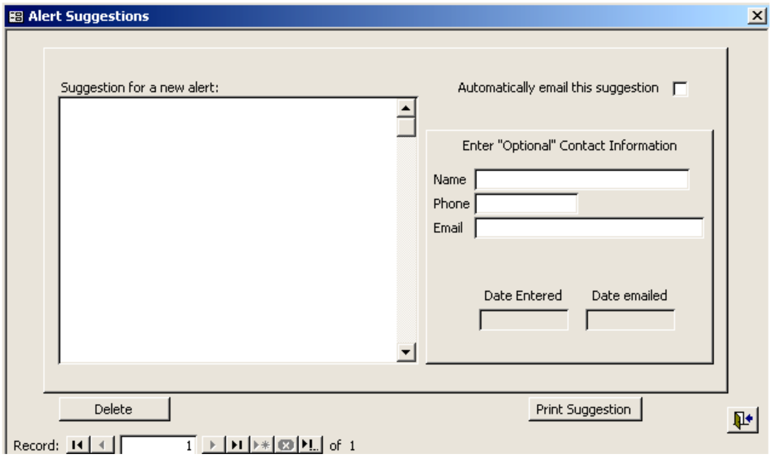
Change IA Password:
Use this section to change the Info-Alert entry password. Info-Alert must have a password set for proper operation. **DO NOT** change the password using other SQL utilities.
- Enter the existing password, a new password, then confirm the new password.
- Press the *Set Password* button to make the change permanent.

Template Pgm:
Enter the name of the database that IA will use when looking for your templates. Typically and by default this will be the 'InfoAlertTpl.adp' file installed with Info-Alert.

Preview Pgm:
Enter here the name and path of the application that you want IA to use when previewing. By default IA is set to use Microsoft's Internet Explorer (explorer.exe) located in its default path.

Alert Suggestions:

Use the Alert Suggestions function to make recommendations for new pre-defined alerts that you would like to see included with Info-Alert. You can either print out the suggestions to be mailed or faxed or you can check the *Automatically Email This Suggestion* checkbox to have it emailed.



Enter a description of your suggestion in *the Suggestion for a new alert box*. Include your name, phone or email if you like. Use the *Print Suggestion* button for a print out or check the automatic email box.

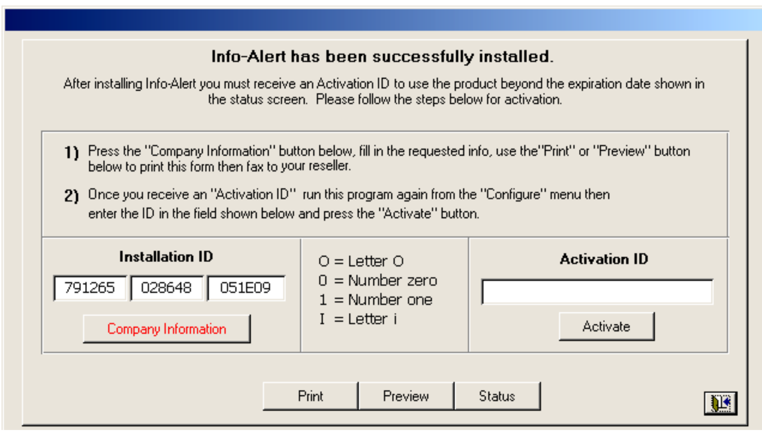
If you check the *Automatically email this suggestion* box this suggestion will be emailed during your next automatic server function.

NOTE: The email address that suggestions are emailed to is set up in the 'Administrative Info' under 'configuration Options'. The default email address is info@infoalert.com.

Activation:

Info-Alert must be activated to use in one of its three modes, "Introductory Edition", "Evaluation Edition" or "Full Edition". Once the programs are installed you will have the ability to run the 'Activation' program.

NOTE: Upon completion of the Info-Alert installation, you will have unrestricted use of IA in a 'Temporary Edition' mode for a period of 30 days, after which you will be locked out until properly activated in one of the three modes described above.

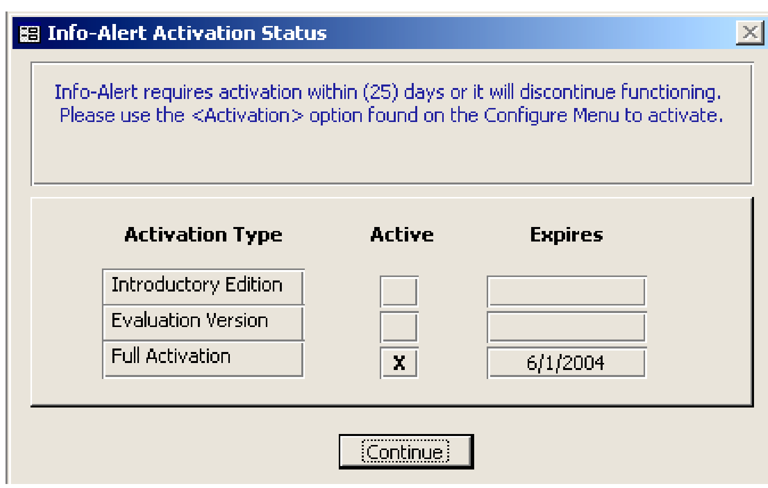


An Install ID will automatically be generated.

Press the *Company Information* button to enter your company specific information.

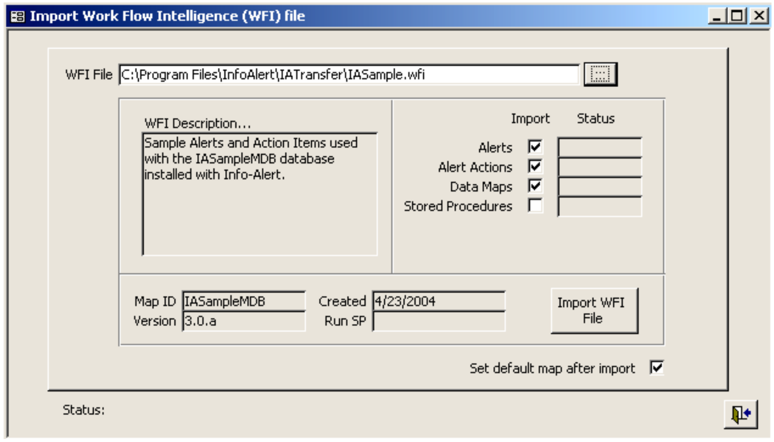
Print the Product Registration Form and fax back to your Info-Alert Reseller. You will receive a return fax with an "Activation ID" on it. Enter the Activation ID in the provided fields then press the *Activate* button. **(Remember, you have full access to IA for 30 days upon installation)**

Once activated, you can verify proper activation by pressing the *Status* button. You should receive a screen similar to the one shown here.



Import WFI File:

A 'Work Flow Intelligence' file can be imported at any time using this menu selection. Please see the 'WFI Creation and Import' section of this manual for details on the creation of a WFI file. A WFI file holds alert logic, actions and events that are particular to a given database or application.



1) Browse to the location of your WFI File. If provided by your software vender the WFI file could be on a separate CD or floppy. After selecting, verify its description.

2) Select the ***Import WFI File*** button to start the import process.

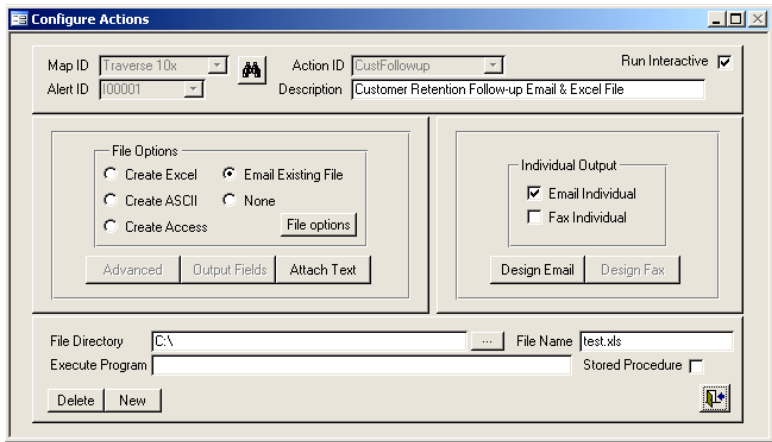
3) View the import process status in the lower left of the form and press ***OK*** to the "Successful" message when complete.

4) Your alert package or "Work Flow Intelligence" package should now be ready for setup and use in the "Alert Manager". Configure and use it as you would any other alerts.

Actions and Events

MAIN MENU - 'Actions and Events'

Actions can be configured to apply additional formatting to returned alert data. For example data returned from an alert can be re-formatted then faxed or emailed to customers, vendors or employees. ASCII or Excel files can also be created and emailed.

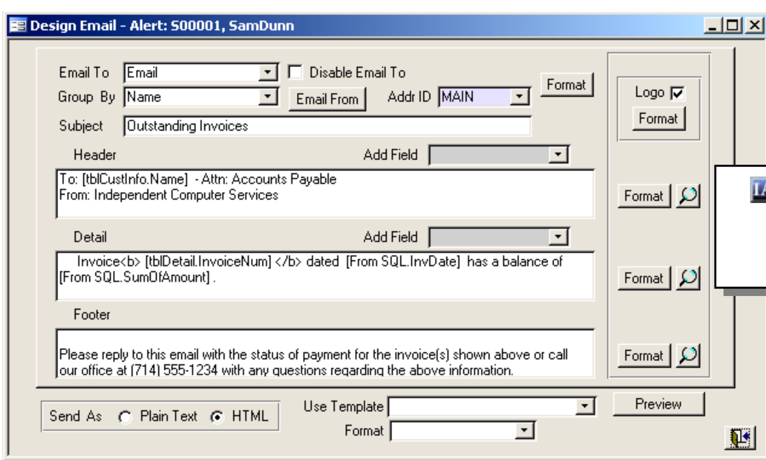


NOTE: Please see the 'Take Action Examples' section elsewhere in this document for an actual example.

TIP: Use the 'binoculars' at the top of the 'Configure Actions' screen to easily search for all the actions that are configured in any 'Map Id'.

Design Email Setup:

Email formats for Alert Actions may be individually designed for maximum effectiveness. Action emails may be sent to customers, vendors, employees, prospects, etc., who have email ID's held in your database.



NOTE: Various options, as described below, are available to help with the email layout.

Email To:

The *Email To* field is pulled from the database associated with the alert you are generating. For example in the action shown above an A/R Dunning message will be emailed to the email ID held in the customer record of those customers with past due invoices.

Group By:

Use the pull down to enter a valid field name with which to group the email output. This allows Info-Alert to keep all records for a given customer, order, vendor, etc together.

Subject:

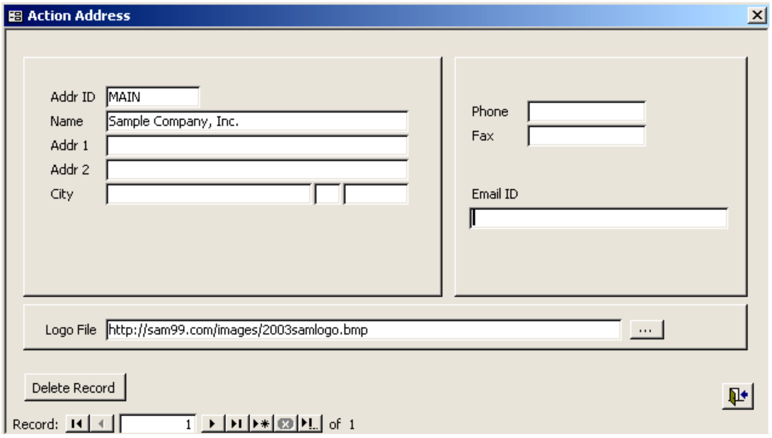
Enter the subject line you want on the email sent by this action.

Addr ID:

You can include your company name and address on your emails. Select an address that has been setup already or double click the Address ID field to run the maintenance function.

You can create multiple address records if you would like to use different company names on separate action Emails.

If you are using a Logo enter an http path in the "Logo File" field.

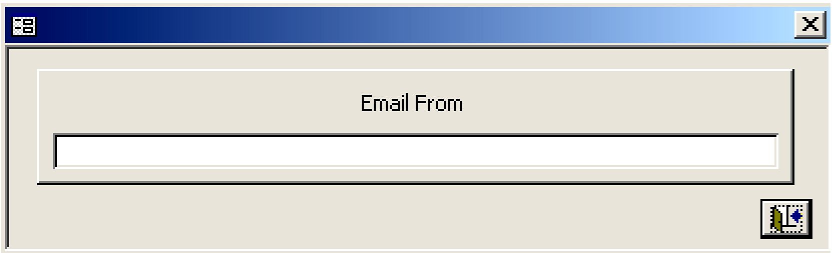


Disable Email To:

Use this check box to keep an action from being sent to an email address with in your current data source. This is normally used when you want to specify unique email ID's that should receive the action.

Email From:

Use the *Email From* button to assign a "From" line to the specific emails sent with this Action ID. A default from line will be used if this field is left blank.



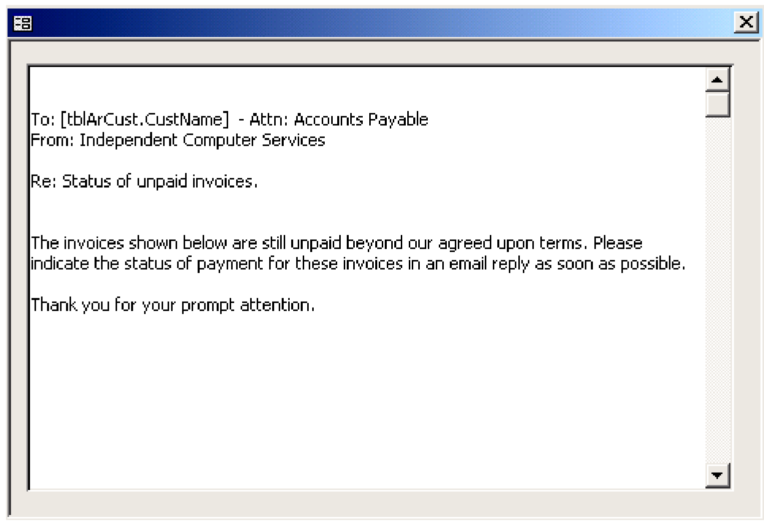
NOTE: This function is useful if you want to make sure replies to your emails are sent to a specific person.

***Header*:**
Enter the text you would like to see in the header portion of your email. This text will print just under your logo and company information, (if an Address ID was used).

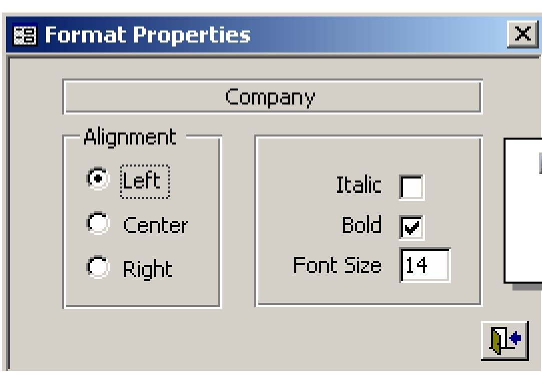
Use the zoom button, to enlarge the text area when you are entering or editing text. It will provide you an expanded version of the text box as shown in the following screen.

NOTE: The text inside the brackets shown in this example will be replaced by actual data from your database. In this case the customers name.

You can use the *Add Field* pull down to add fields that are available with this alert.



Format:
The *Format* button allows you to assign various format properties to the section of text you are working on. For example if you would like the Header portion in a larger font or centered vs. left justified just enter the appropriate parameters.



NOTE: Some formatting options will not apply to emails sent in text mode vs. HTML. Please run a "Preview" to verify the format of your email.

Detail:
Use this field to show the wording and data fields you would like the body of your email or fax to use. As an example: Invoice [tblDetail.InvoiceNum] dated [From SQL.InvDate] has a balance of [From SBL.SumOfAmount] , where all of the ‘[ ]’ variables are provided in the ‘Add Field’ drop downs and will be filled in with actual data from your data source upon the running of this action. Use the ‘Format’ and ‘Spyglass’ buttons as detailed in the above ‘Header’ description.

Footer:
Similar to the ‘Header’ and ‘Detail’ fields, this area allows for a wrap up of your email or fax, such as: ‘Thank you for your quick response to this issue and please respond to this email with a status of your payment.’ Use the ‘Format’ and ‘Spyglass’ buttons as detailed in the above ‘Header’ description.

Send As:
Indicate how you would like the output of your email or fax to be formatted, using ‘Plain Text’ or a more graphical ‘HTML’ format.

Use Template:
This option allows for a very versatile and creative way for you to send an action using a template you have created within MS Access. This template could be a virtual copy of an actual Invoice, Order Acknowledgements, etc, from your accounting software that when used with an action could allow for the automation of sending such documents to your customers. As an example: A replica template of your accounting software’s ‘Order Acknowledgments’ could be created and then pointed to during appropriate alert and action to email your customer an order acknowledgment every time an order was entered into your accounting software.

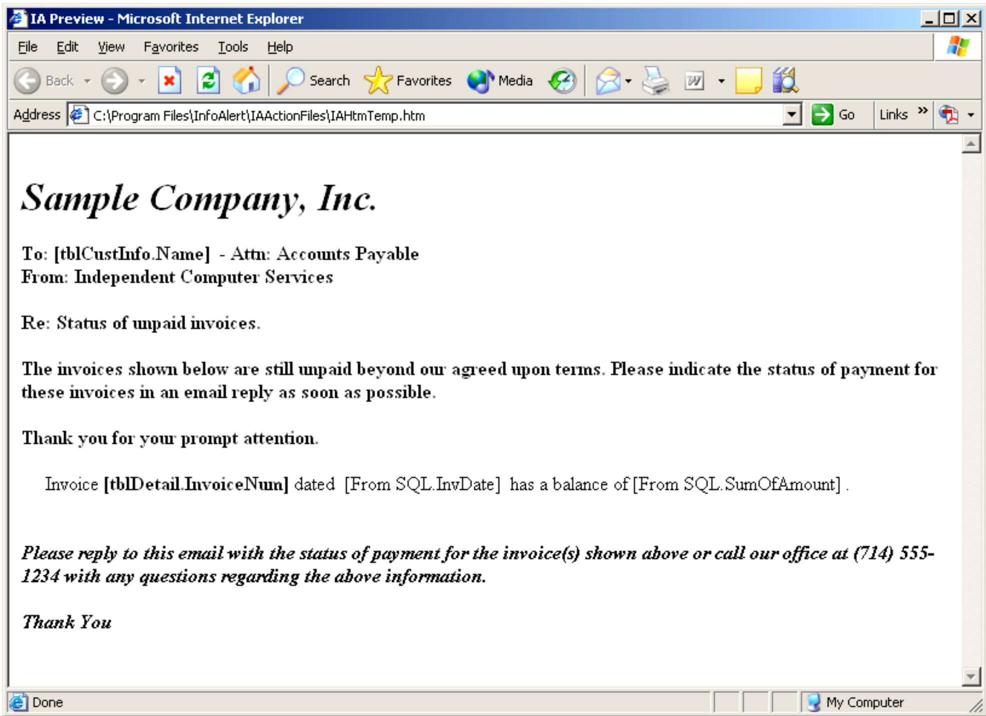
Use the IA Tool Kit ‘Build Alerts’ utility to manage templates. Here you will be able to Edit existing, Copy existing or create your own template using Microsoft Access. See the ‘Tool Kit’ section of this manual for more details on managing IA templates.

NOTE: There are many uses for templates during an action and this is a great place to be creative.

Format:
Enter the desired output format of your template, using ‘Snap Shot’, ‘Rich Text’ or ‘HTML’.

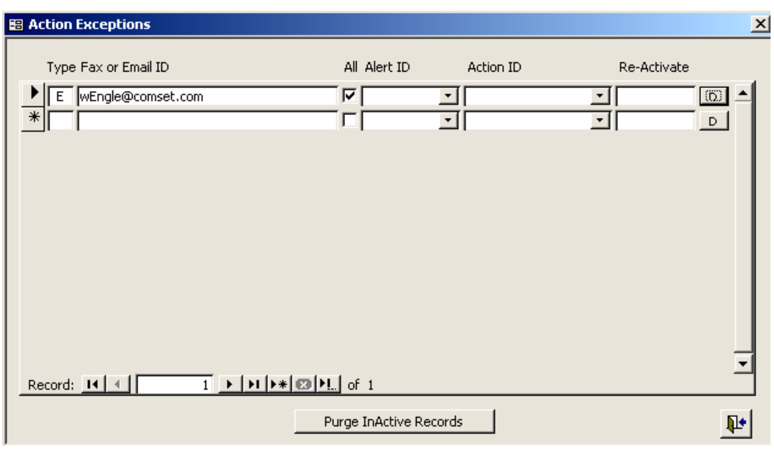
Preview:

Press the *Preview* button to view your output. The preview will display the sample in your MS Explorer application to better illustrate what the completed email will look like.



Action Exceptions:

‘Action Exceptions’ are used to suppress the sending of emails or faxes to certain ID’s. You can identify customers, vendors or others that you do not wish included when automatically sending emails or faxes.



Type:

Enter an ‘E’ for email or ‘F’ for fax to identify the type of ID you want to suppress.

Fax or Email ID:

Enter the fax number or email address to suppress

All:

Use this checkbox to tell Info-Alert to suppress this ID for all alerts.

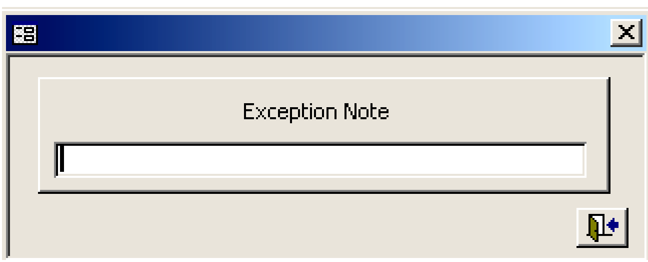
Alert ID:
Enter an alert ID if you want to suppress this ID only for a given alert.

Action ID:
Enter an Action ID if you want to suppress this ID only for a given action.

NOTE: Be sure to uncheck the *All* check box otherwise it will override the other settings.

Re-Activate:
If you would like to suppress sending to a specific Email or Fax ID for a certain amount of time enter a date in the Re-Activate field telling Info-Alert when to continue sending alerts to this ID. This can be used if you want to suppress sending A/R Dunning notices to a customer while you work with them.

D:
Use the *D* (*Detail*) button if you wish to enter a note indicating why this ID is being suppressed. Pressing the *D* button will bring up the following form.

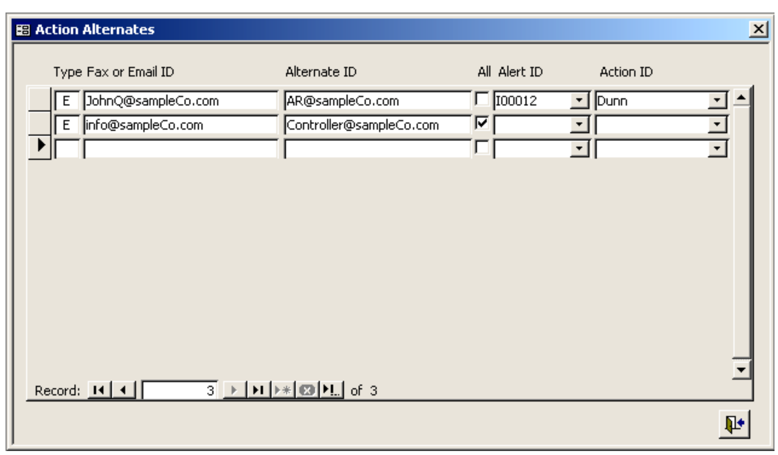


Action Exception Notes

Purge InActive Records:
Use the *Purge InActive Records* button to delete records that have gone past their reactivate date.

Action Alternates:

The 'Action Alternates' screen allows for the ability to indicate an alternate action email or fax address from the one that is listed within your data. Let's say that the email address in your database is for a particular client that you wanted to send a dunning action email to, (using alert 'I00012' with 'Dunn' Action ID), was the owner JohnQ@sampleco.com, but you want the dunning letters to instead be emailed to the AP dept head at AP@sampleco.com. The first record of the sample shown would accomplish this.



Type:
Enter an 'E' for email or 'F' for fax to identify the type of ID you want to use.

Fax or Email ID:
Enter the fax number or email address to replace.

Alternate ID:
Enter the fax number or email address to be used instead.

All:
Use this checkbox to tell Info-Alert to replace this ID for all alerts.

Alert ID:
Enter an alert ID if you want to replace this ID only for a given alert.

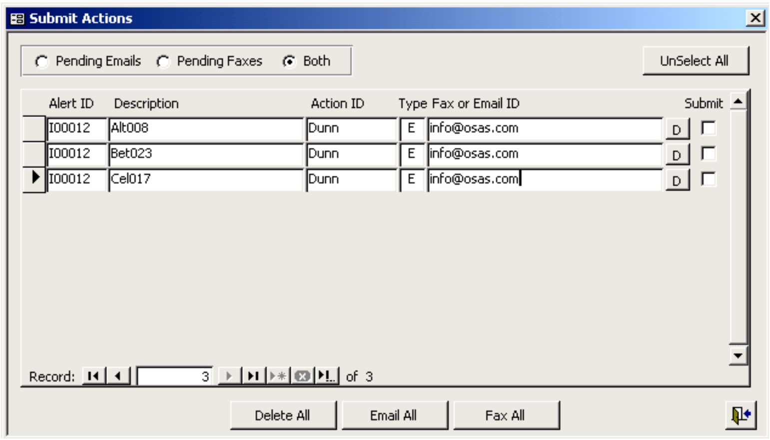
Action ID:
Enter an Action ID if you want to replace this ID only for a given action.

NOTE: Be sure to uncheck the *All* check box otherwise it will override the other settings.

TIP: The 'Action Alternates' can also be used to send copies of Action Emails to more than one recipient. For example, if you would like a Sales Order acknowledgement to be sent to your customers and a copy sent to your sales rep you could configure the 'Action Alternates' in the following way: 'Email ID: sampleco@samco.com and 'Alternate ID: SO@samco.com, plus a second record: 'Email ID: sampleco@samco.com and 'Alternate ID: salesrep@,mycomp.com. In this example, an action email sent to sampleco@samco.com will now go to both SO@samco.com and salesrep@mycomp.com.

Submit Actions:

The 'Submit Actions' screen works in conjunction with the 'Interactive' check box at the top right of the 'Actions Setup' screen and provides for the 'queuing' of email and/or fax output prior to sending. This allows you to view the list of outgoing actions and control which ones will be set for output, adjusted, or deleted and not sent. Checking the 'Submit' column will flag those action outputs to be processed at the next Info-Alert Server run.



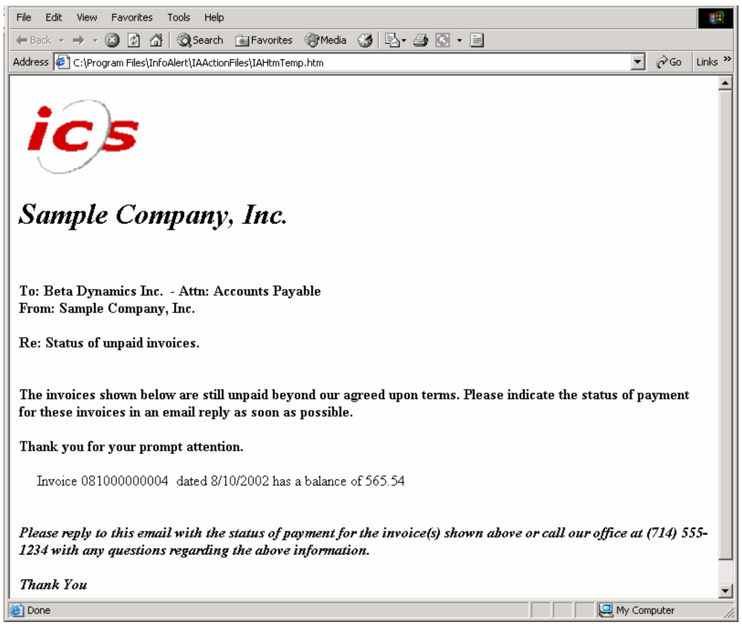
Pending or Both:
Choose what type of output actions you want to view and submit, fax, email or both.

Alert ID, Alert Description, …:

Each record queued for output will be listed here, <u>if action was set to 'interactive'</u>. Choose the 'Delete All', 'Submit Emails' or 'Submit Faxes' buttons to globally select the required records or manually check each record using the 'Submit' column.

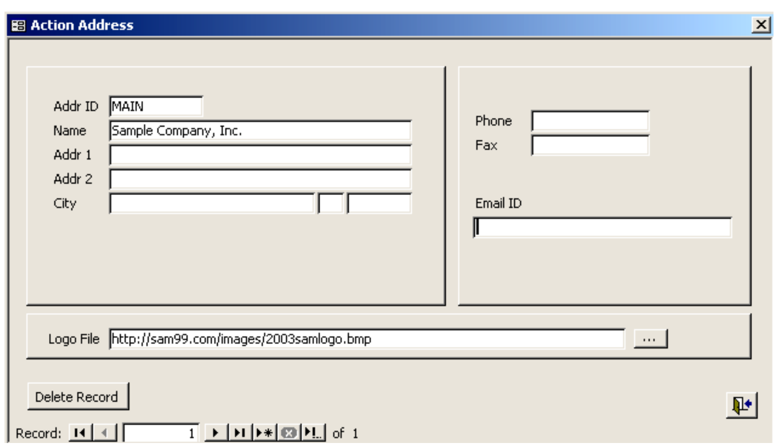
'D' :

Use the 'D' button to view the details of each action ready for output. This is a quick way of insuring that the final output is what you want, otherwise you can delete it. See the following screen example:



Action Address:

The 'Action Address' screen provides for alternate layouts of company and address information. For example, you might create an Address ID of 'Adrs_Fax' that would show the full logo, company name and full address; Another Address ID might be Adrs_Email that would just show the logo and the company name.

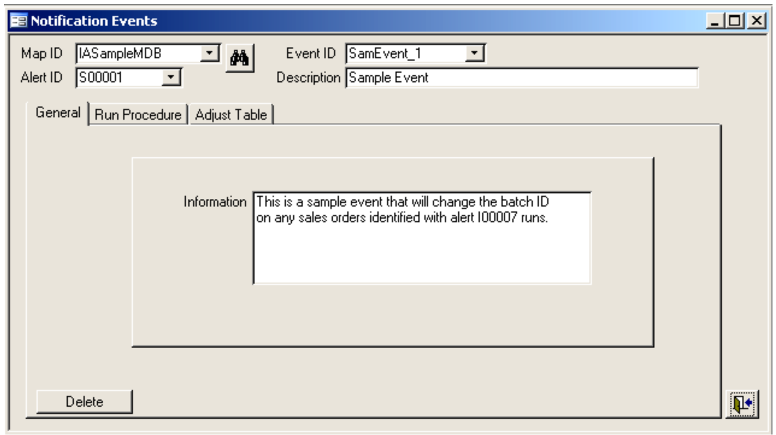


If a logo is to be used, enter the file path where the fax transport can find your logo bitmap file. This file must be in BMP format. If you wish to use the logo with an email, you will need to enter the path to the logo file available to the internet, as this file if left local, will not be found remotely.

Notification Events:

The 'Notification Events' screen allows for output configuration of alert results to many different destinations, local or remote. For instance, an 'Event' could be set up to update the customer comments table of your accounting data when Info-Alert has automatically sent a dunning letter.

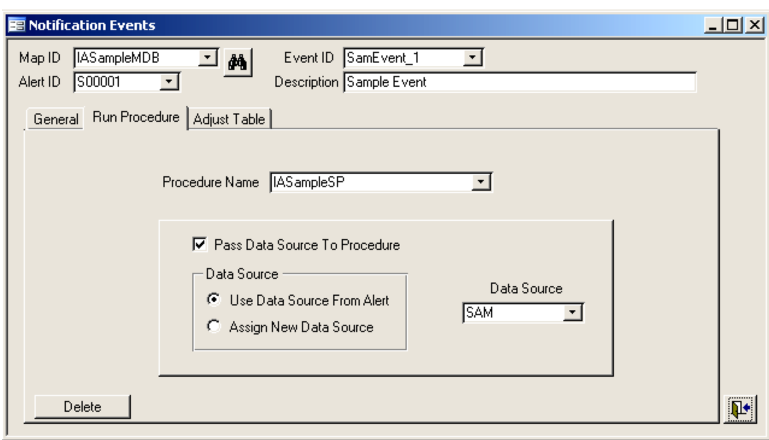
General Tab:



Event ID / Description:
Enter an appropriate name or ID for this Event and give it a description.

Information:
Enter any additional information about this event that will help identify it from other events.

NOTE: If you have a stored procedure that will run as your event, you can configure it using the 'Run Stored Procedure' tab. If you do not have a stored procedure, you can manually create the event code by using the 'Adjust Table' tab.



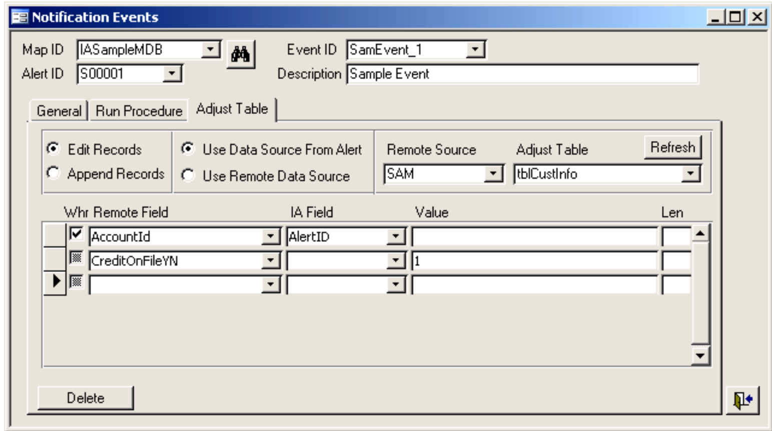
Run Procedure Tab:

Procedure Name:
Indicate the name of the stored procedure to be used.

Pass Data Source To Procedure:
Check here if you want Info-Alert to pass a data source to your stored procedure.

Data Source:
Choose whether this event will use the data source indicated in the associated alert or use another data source that can be chosen in the 'Data Source' pull down box.

Adjust Table Tab:



Edit Records:
Select this option if this event will be adjusting an already existing record in your remote data.

Append Records:
Choose this option if this event will be adding a record to your remote data.

Use Data Source From Alert and Use Remote Data Source:
Choose whether this event will use the data source indicated in the associated alert or use another data source that can be chosen in the 'Remote Source' pull down box.

Remote Source:
Indicate the data source that is configured for your remote data. This may be different from the data source that the alert is using.

Adjust Table:
Indicate the table name in your remote data source that you wish to adjust or publish data to. Use the 'Refresh' button as needed.

Whr:
Use this check box to indicate that this line is a 'Where' clause. If this box is left blank, IA will assume that the line will be for update. As shown in the example: The 'Whr' box is checked indicating that the first line is a 'Where' clause that will update the 'tblCustInfo' table 'CreditOnFileYN' field to '1' where the 'AccountId' in 'tblCustInfo' matches the 'AccountId' returned in the alert result.

Remote Field:
Enter a field name from the remote data that will be used in each line.

IA Field:
Select the appropriate field in the pull down that comes from the results of the associated alert. You will not need an entry here for an update line.

Value:
This entry will tell IA what to enter into the indicated data field in the remote data source. In the example, we are updating the 'CreditOnFileYN' filed with a '1'.

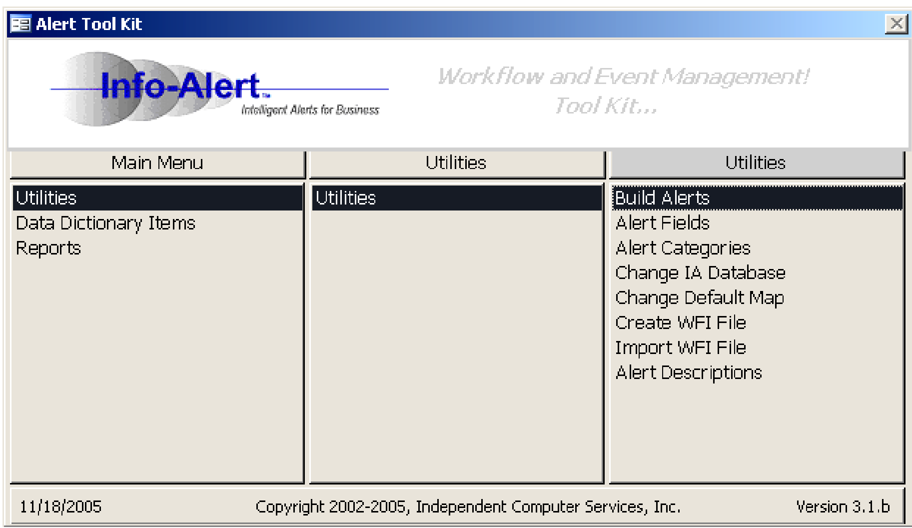
Len:
If the size of the field in your remote table is less than the amount of data from IA that will be published you should enter the maximum size in the "Len" field, or an error will occur.

Info-Alert Tool Kit

Info-Alert's Tool Kit allows you to add custom alerts to pre-defined Data Maps and configure Info-Alert to work with additional sources of data.

This section will walk you though the steps necessary to create a sample MS Access Data Map and an Alert using the Data Map Wizard and Build Alerts functions. The Tool Kit is installed by default in an 'Evaluation' mode and can be activated to 'Full' upon purchase.

Please contact your Info-Alert reseller with any questions regarding the use of the Tool Kit or to obtain a full activation.



Info-Alert can connect to various data sources including MS SQL Server, MS Access, MS Excel, and other sources where an ODBC driver has been provided for connection to Microsoft products **– *(Please see "Issues and Exceptions" at the end of this document for further connection information).***

Following is an example of how to create a new Data Map, and an alert, based on sample data provided with your Info-Alert installation.

NOTE: Please run through the example as shown to make sure everything is working correctly, then feel free to create additional alerts to better familiarize your self with the capabilities of the Tool Kit.

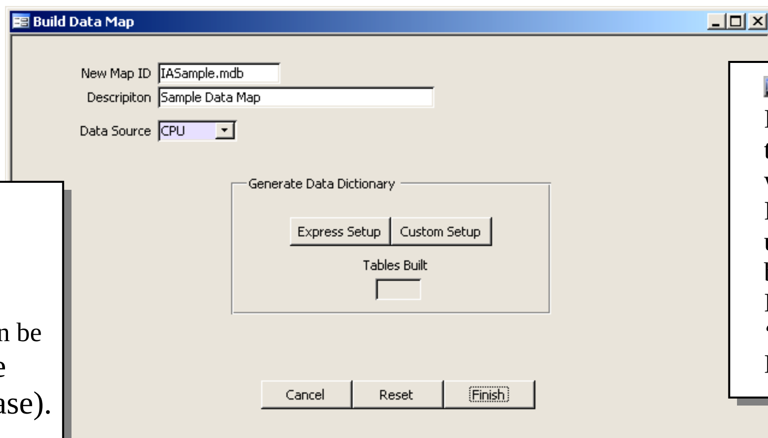
Create New Data Map

One of the unique benefits of using Info-Alert is that it can be attached to many different databases to provide automated alerts based on certain information within those databases.

To see how easy it is to connect to a new database use the sample Microsoft Access database, (IASAMPLE.MDB), provided with Info-Alert to create a new data map and sample alert.

1. Select the 'Data Map Wizard' from the 'Data Dictionary' menu.

2. At the following screen type in an ID and a description of the data you will be attaching Info-Alert to.

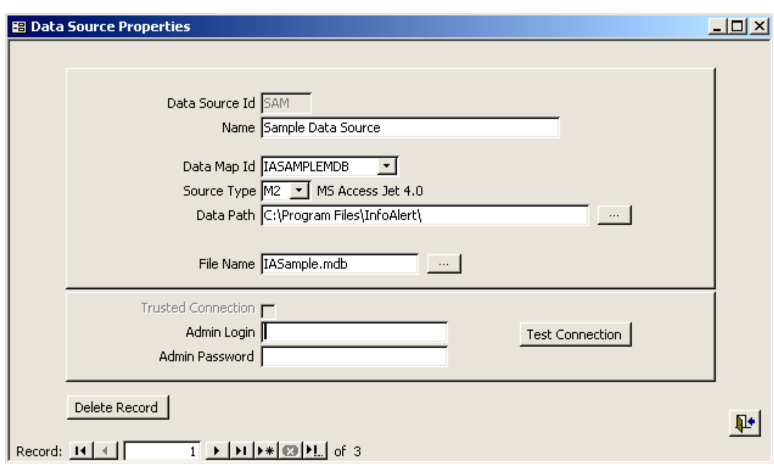


NOTE:
For the purpose of this sample, use an ID of "IASAMPLEMDB". ('IASAMPLEXLS' can be used when running the XLS sample database).

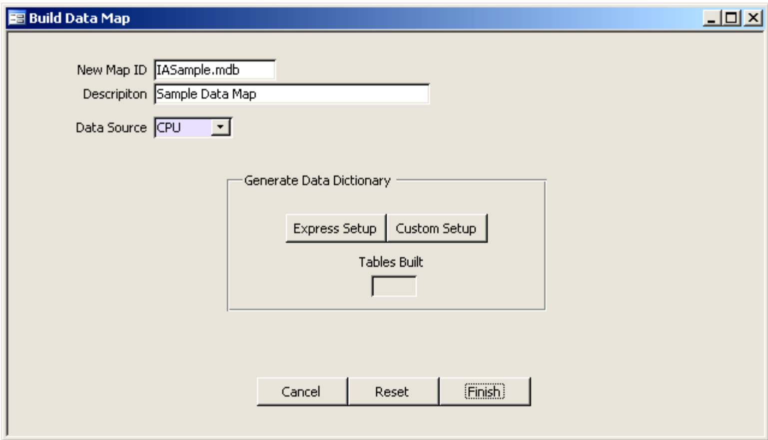
NOTE:
If you have already ran through this sample and want to re-create the map ID, you can delete the map using the Delete Map button found on the 'Map ID's' form within the 'Data Dictionary' Menu in IA Tool Kit.

3. A data source is required to tell Info-Alert where your data is located and what type of data it is. Double Click the *Data Source* field to set up a new source. If you have already created a data source, use the pull-down to select a valid ID. Please move to **Step 8** of this chapter.

4. Set up a data source as shown here. Change the *Data Path* to point to the path where you installed Info-Alert on your system. Here you will find the sample database "IASample.MDB". A valid *Test Connection* is required to move forward.

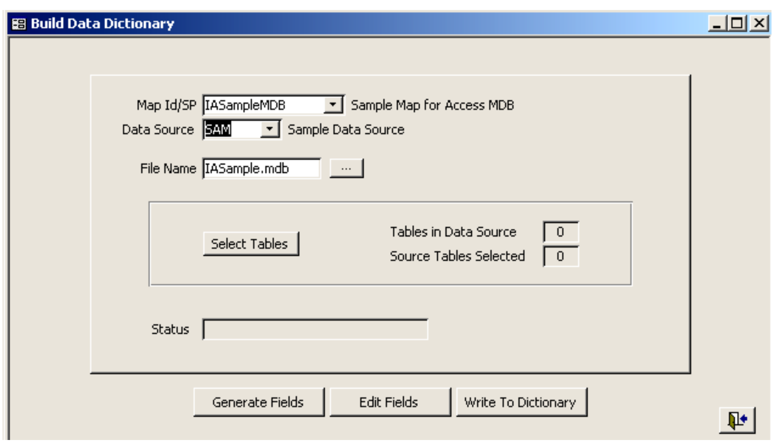


NOTE: To setup the Excel sample, use a different Source ID and Name, with Map ID "IASampleXLS" and Source Type of 'E1'. Then browse to the path where you installed Info-Alert on your system, find the sample database "IASample.MDB".

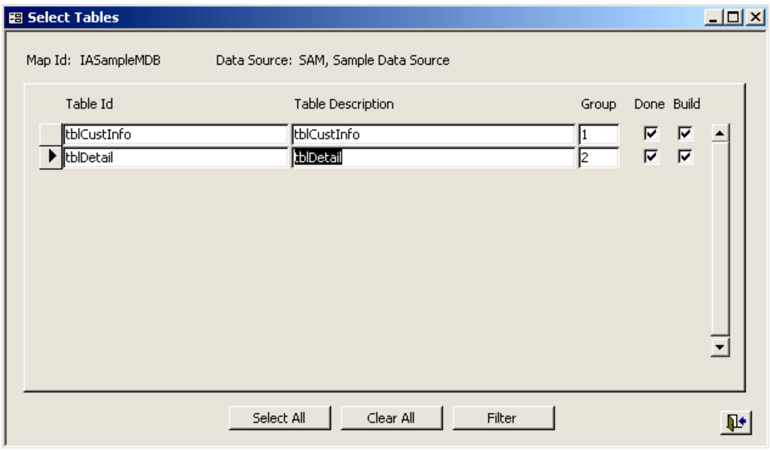


5. You will then have the ability to select one of the following two methods of building your data dictionary. ***Express Setup*** assumes you want all available tables and fields in your data source mapped and will do them for you automatically. The ***Custom Setup*** option allows you to control what tables and fields are mapped and allows you to assign different headings to tables and fields if desired. You can choose either option. If you choose the ***Express Setup*** option, please skip to **Step 13** of this chapter.

6. If ***Custom setup*** is chosen you will see the following screens of the 'Build Data Dictionary' program. This program can also be run from the menu without selecting the 'Data Map Wizard'. You can point to a ***Data Source***, such as "SAM" to create a data dictionary. Click on the ***Select Tables*** button to see what tables are available in the IASAMPLE.MDB database.



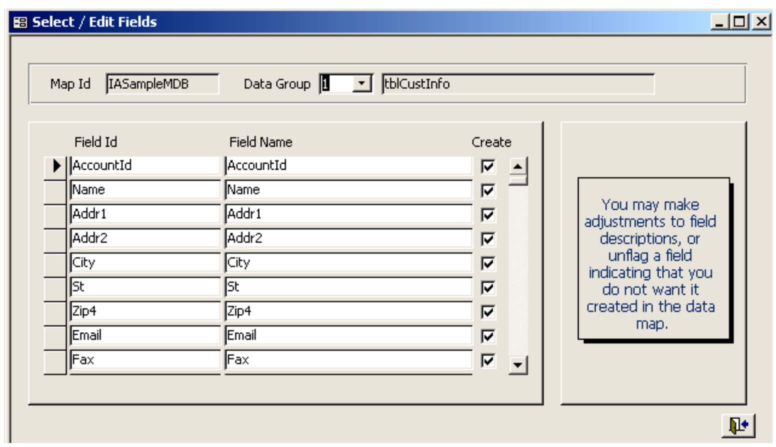
7. Press the ***Select Tables*** button to view the next screen.



8. Once the tables are displayed, select the tables to include in your map by checking 'Build' and change the descriptions if desired. Use the *Select All* button to select all tables. Close the screen when done to return to the 'Build Data Dictionary' screen.

9. Press the *Generate Fields* button from the 'Build Data Dictionary' screen to create a temp table of fields associated with the tables you have selected.

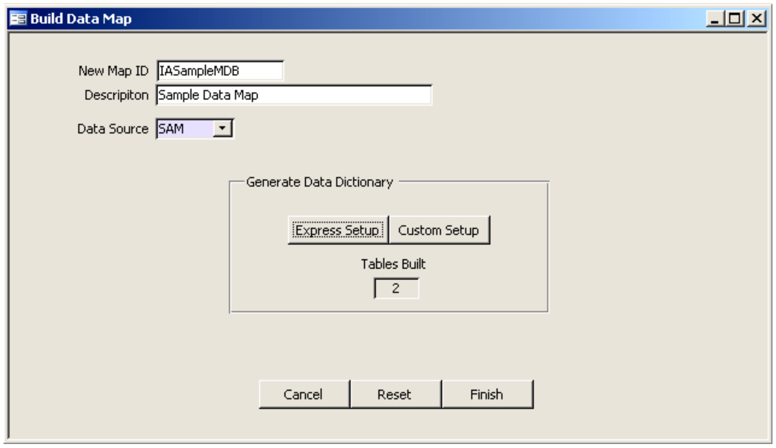
10. When complete, select the *Edit Fields* button to remove the *Create* flag on a field or change the name as shown here. To do this, select a *Data Group* from the pull-down to indicate which table to use and then 'uncheck' any fields not needed in this map.



11. After you have changed or dropped any fields, close the edit screen and press the *Write To Dictionary* button from the 'Build Data Dictionary' screen to complete the build process.

12. Close the 'Build Data Dictionary' screen to continue.

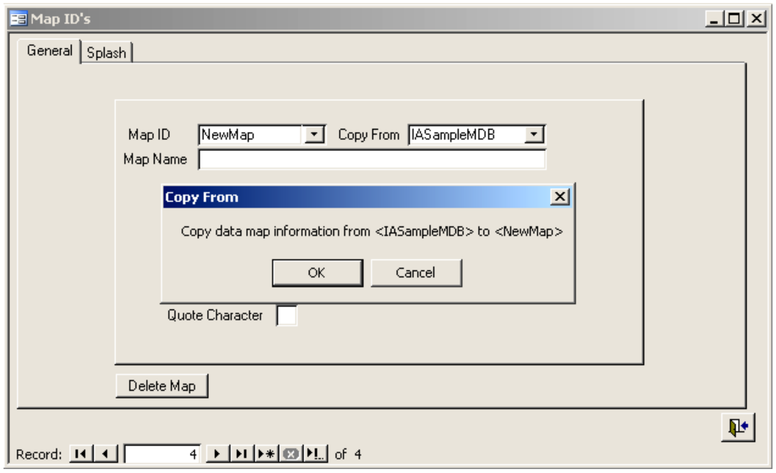
13. When finished you will have created tables, groups, and fields required for Info-Alert to understand the data you want to be alerted on. The number shown now will represent the number of tables built.



Press the *__Finish__* button to complete the process. You are now ready to create an alert.

COPY A DATA MAP:

A new data map can also be created by copying from an existing Map ID. To copy from a new map ID select the "Map ID's" option from the "Data Dictionary Items" menu.



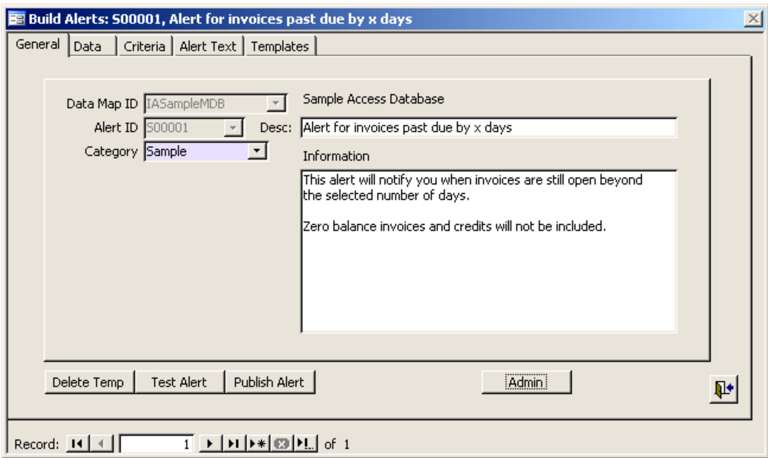
Select the new record button using the record selectors at the bottom of the Map ID's screen. Enter a new ID in the Map ID field, "NewMap" is used in this example. Using the combo box pull down, select a Map ID to copy from. Once prompted, press OK to create your new Map. When the map has finished its copy enter a new Map Name and you are ready to use it for new alerts.

Create New Alert

Once data maps are completed you can use the Info-Alert ‘Utilities’, ‘Build Alerts’ to create a new alert. To create a sample alert for the IASAMPLEMDB data map we just created please use the following steps.

BUILD ALERTS:

General Tab:



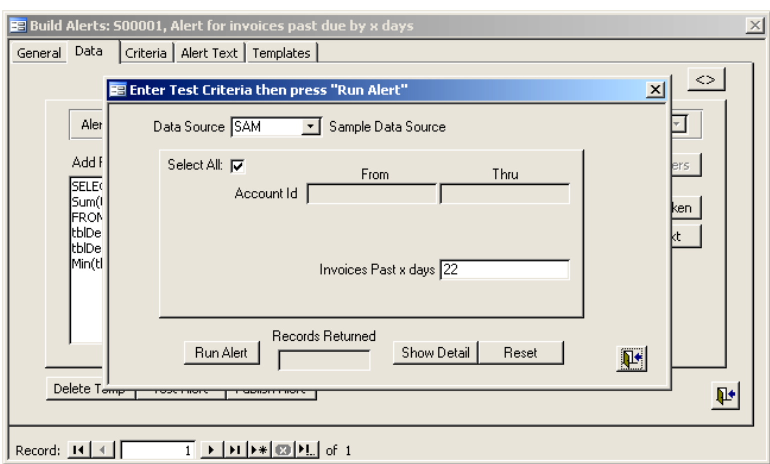
1. Use the *Data Map ID* pull down to select “IASampleMDB”.

2. Enter a new *Alert Id* of “S00001” and give it a brief description.

3. Enter a *Category* of ‘Sample’.

4. In the *Desc and Information* box enter a summary description and a detailed description of the alert you are creating.

5. The *Delete Temp Record* button allows you to clear any custom alert configuration prior to publishing. You can have multiple records of custom alerts you are working on and are able to switch between them at any time. These Pre-Published alerts will be saved here until deleted.



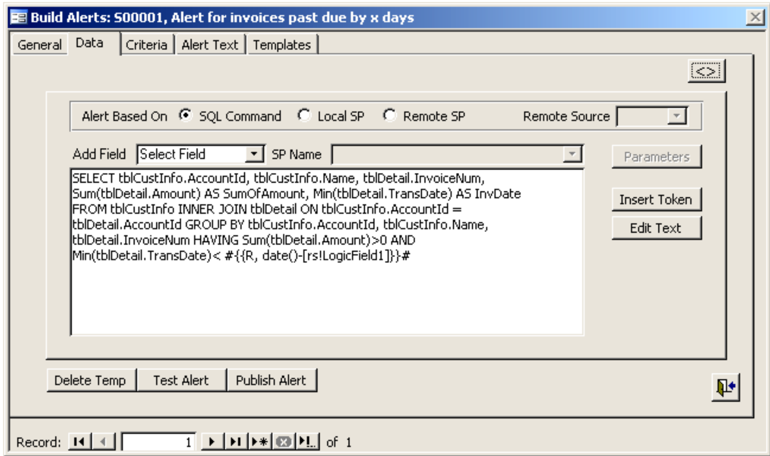
6. The *Test Alert* button allows for ‘on the fly’ testing. Any custom alert will need to have a successful test in order to be published.

7. The *Publish Alert* button publishes a successfully tested custom alert to the Info-Alert Manager and will be available there for configuration and scheduled use.

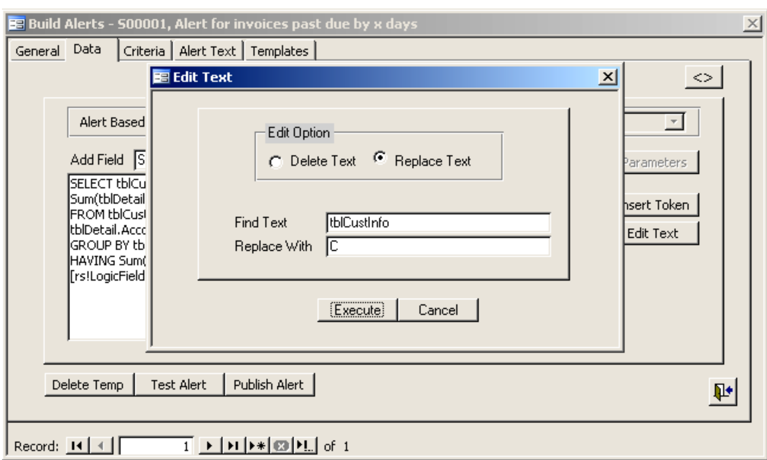
Data Tab:

.

8. The SQL Command is what drives the alert. You can generate the command by typing it directly into the box as shown here or by using a query builder tool such as a view in SQL Server or a query in MS Access, then cut and paste the SQL code. For the purpose of our sample please type the code you see here. See "SQL Token" later in this manual.



9. You can use the *Edit Text* function to globally change text inside your Data SQL command. For example if you were to use the example above and wanted to use alias's in place of absolute table ID's you could use the following commands.

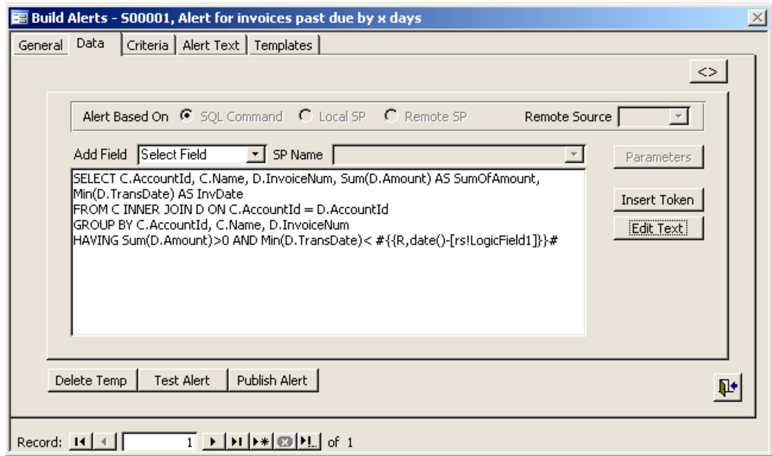


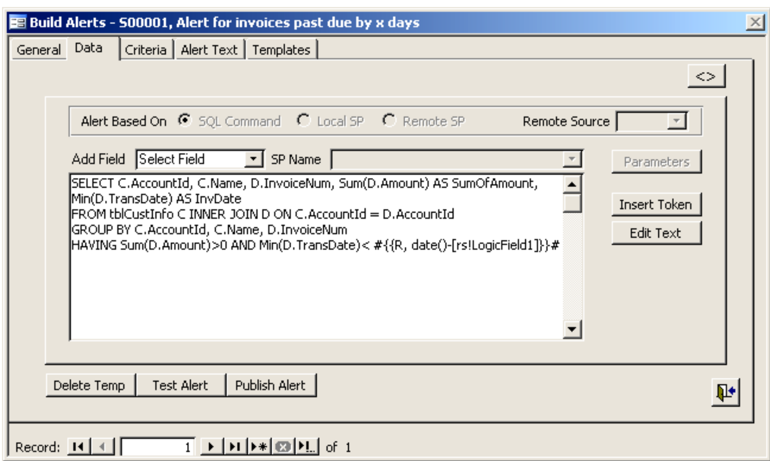
10. Press the "Edit Text" button then select the "Replace Text" option.

11. To change the reference to tblCustInfo to a single character, insert the text as shown below.

12. Press the "Execute" button to make the changes to your SQL text. Run the same function again to change the reference of tblDetail to the letter "D". You will end up with the text as shown in the screen below.

13. We need to make one more change to the text for it to work correctly. In the screen shown here the table names in the FROM clause were also replaced with our alias. We need to undo the alias replacement within the FROM clause to again show the table name as indicated in the next screen.





14. Please notice that we have inserted the table names that we are going to alias just after the FROM clause and INNER JOIN. Using an alias for long table names can help substantially reduce the size of your SQL command.

15. The "Edit Text" command can also be used to delete text that you do not want or need in your SQL command. This is especially useful if you have a leading reference to your table names because you have copied your text from MS Access, Excel or another query generator. For example CPU.dbo.tblCustInfo can be changed to tblCustInfo by deleting all CPU.dbo. references.

NOTE: The syntax of the above SQL command may be different based on what Data Source Type you are connecting to; the above sample is connecting to a Source Type of M2, *Microsoft Access*. For example, if connecting to a Source Type of E1, *Microsoft Excel spread sheet*, a select statement based on the data within the IAsample.xls spreadsheet that would alert us to any customers whose credit date will expire within x days would look like this:

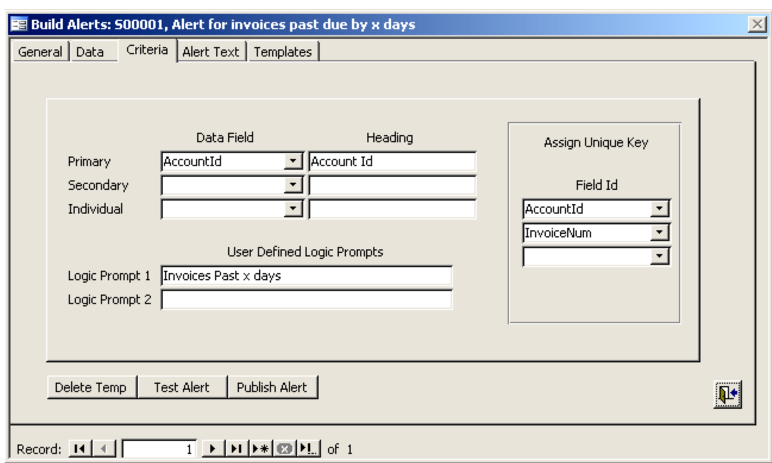
SELECT accountid, name, creditexpiredate FROM [sheet1$] WHERE creditexpiredate < #{{R,date()+[rs!LogicField1]}}#

In this command ***accountid, name, and creditexpiredate*** are all fields from the IA sample spreadsheet known as ***sheet1$*** and ***#{{R,date()+[rs!LogicField1]}}#*** represents a calculated date based on the current date + the number of days a user entered in the logic field. Notice the syntax differences between the Excel command at the table name and the logic field entries.

TIP: Also note that the text shown above inside the double curly brackets {{….}} can be automatically inserted using the *Insert Token* button. Please see “How to use the SQL Token” section of this manual for more information.

Criteria Tab:

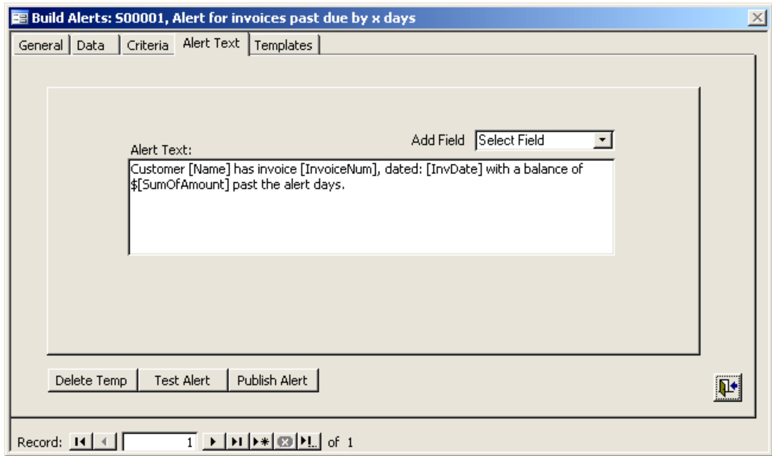
16. At the “Criteria” screen enter the information shown here. This section allows you to customize what criteria will be available to the end user in the form of *From/Thru* and *Individual* entries on the “Alert Setup” screen.



17. Enter a logic field to prompt the user for information used to generate the alert. Refer to the descriptions on the screen for more information.

18. Info-Alert allows for the ability to not only schedule how often to check for an alert but also how often to re-notify you of the same alert condition. This ability is handled by assigning a unique “record key” in history. For the purpose of our sample please enter *AccountId* for the field ID.

Alert Text Tab:

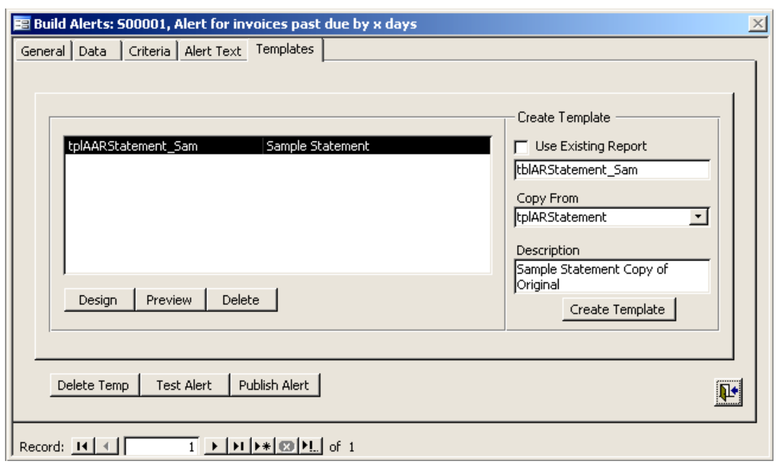


19. Here we will enter a brief amount of text that will become the alert. Note that text entered inside the brackets will be replaced by actual data from the database representing the field name. In the example here [AccountId] and [Balance] will be replaced by actual data, and this line will show in the results of this alert, printed or emailed.

TIP: It's important when building an alert to make sure that the field names you put inside the brackets are exactly as they are found in your database. You can use the *Add Field* option to pull fields directly from the data dictionary.

TIP: Inside any numeric field, such as [Balance], insert a comma and number to format the output decimal places. (i.e. [Balance,2] which would be shown as xxxx.xx)

Template Tab:



20. Use the 'Create Template' section of this screen to Create new, Copy from, or Edit an existing IA Template.

21. Use the area to the left to manage one or more templates available for Design, Preview, or Deletion.

Templates are MS Access reports that may be formatted and used with your alert output to provide a more elaborate, richer display of your data. Boxes, lines, logos and sub-forms may be used in your template design.

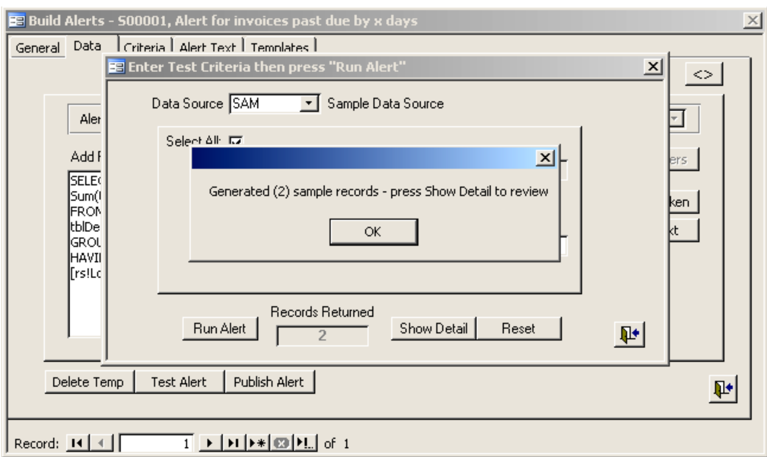
Individual templates are associated with unique alerts. The data returned from alert logic is directed through the selected template for output. When designing a new template, data fields defined in your alert will be available for use.

NOTE: You must have FULL version of Microsoft Access installed on the machine that you are running the IA Tool Kit on if you want to 'View' or 'Edit' a template as this screen will automatically run MS Access to allow for you to perform these processes.

How to use the ***SQL Token:***

In the previous sample code there was a token added. All data inside the double curly brackets {{ and }} is a token that Info-Alert processes by inserting or computing user defined data into the SQL statement during alert generation. In the example shown above the "S" after the opening brackets indicates that we will insert the data found in LogicField1 into the command. If the user indicates that they want all balances greater than 500 to be alerted the command above will put the amount 500 after the > sign.

If you want to return a result to the SQL command you would use the letter "R" in place of an "S". An example would be SELECT * FROM tblARHist WHERE InvDate < #{{R, date( ) – [rs!LogicField1]}}# would actually return SELECT * FROM tblARHist WHERE InvDate < #2/15/05# (or similar).



1. Once you have entered your SQL code you need to test it for accuracy. Press the *Test Alert* button – you should see the following screen.

2. Check the *Select All* box and put in a small dollar amount in the logic field.

3. Press the *Run Alert* button to actually check your data.

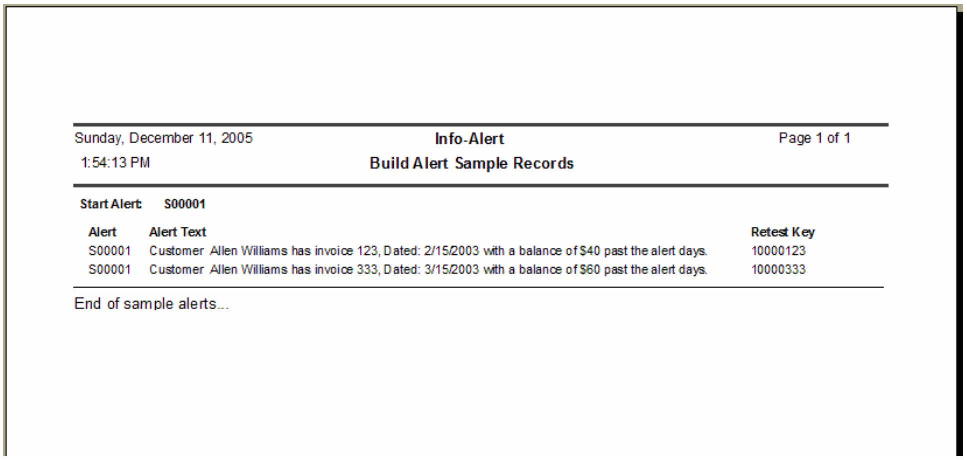
4. You should not see any errors and a message stating, "Generated (x) Sample Records – press *Show Detail* to review" should appear.

5. Press enter then the *Show Detail* button to review your alerts.

NOTE: You must successfully return alert records to finish and save your alert.

TIP: If you see any errors be sure to check your SQL command. Many times the error will give you an indication as to what was wrong with the command. Also it's important to check the *Alert Text* screen shown in step "19" to verify that the field names in brackets are valid field names in your database and that they would have been included in the record set returned by your SQL command.

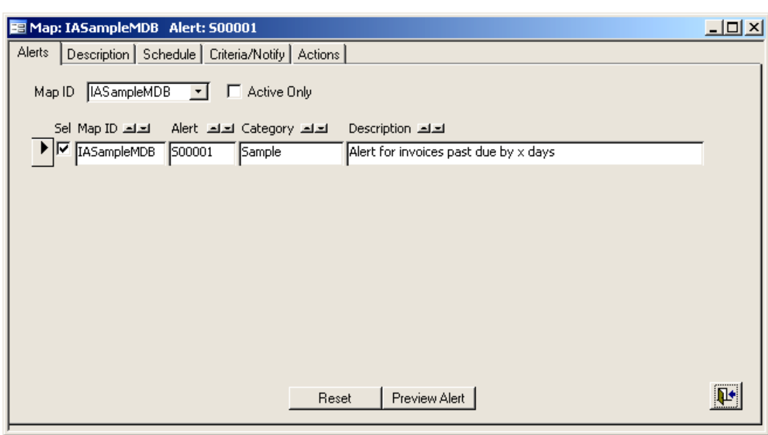
6. Sample records should display similar to those shown below. If you want to make any changes in your alert wording just select the Alert Text tab and make adjustments.



7. If everything looks ok then press the ***Publish*** button to write your alert to the *local* Alert Manager making it available for setup and scheduling just as any of the pre-packaged alerts.

Once your alert is completed you can run the "Alert Manager", select the appropriate *Data Map* and test your new alert. Use the following steps to see how.

DEVELOPERS TIP: Use the 'Create WFI File' under 'Utilities', described later in this document to transfer your new alert(s) and it's components to other IA Managers. This allows for the distribution of "Product Specific" or custom data maps and alerts to be easily imported to any applicable Info-alert environment through the installation of a single WFI file!



8. Open the 'Alert Manager' program.

9. From the 'Main Menu' select 'Alerts', 'Alerts', 'Select Alerts'.

10. Use the pull down to select the new map "IASAMPLEMDB", that was created in prior steps for the sample MS Access database.

You can now use the "Alert Manager" to setup, schedule and run your new alert.

NOTE: These same steps can be used for other map ID's and Database connections. The "Evaluation" activation of "Tool Kit" will also provide connection to a sample MS Excel Database using the "IASAMPLEXLS" map ID and the "IASAmple.xls" database found in the IA directory.

TIP: Use the "Create New Data Map" and "Create New Alert" sections of this guide to see how easy it can be to attach and alert on data within a MS Excel spreadsheet.

WFI File Creation and Import

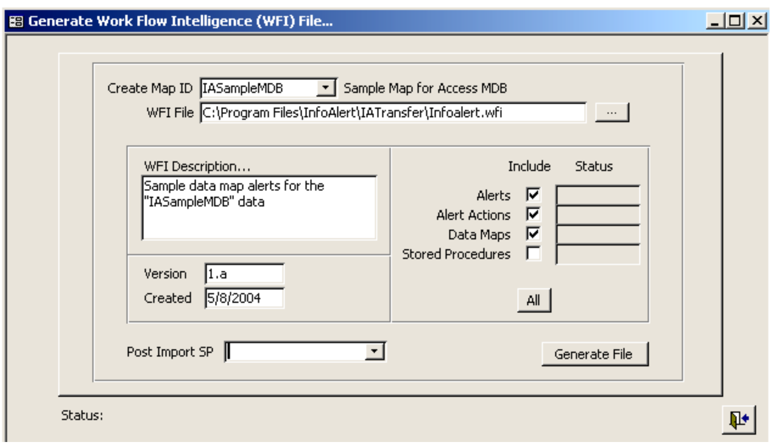
Overview of IA Work Flow Intelligence files:

Once you have created your new custom alert(s) and data map, you may want to make them available to other Info-Alert environments. This process is easily achieved using the 'Create WFI File' utility in the "Tool Kit" along with the 'Import WFI file' utility found both in "Alert Tool Kit" and in the "Alert Manager". **Complete the following steps to create your custom "Work Flow Intelligence" package and then distribute to any IA Manager.**

NOTE: This process is *not* needed to add new alerts to the local environment. Tool Kit will add any new alerts to its' local IA Manager upon successful finish of the 'Alert Wizard'

Create a Work Flow Intelligence File (WFI):

1. From the "Alert Tool Kit" menu, select 'Utilities' and choose 'Create WFI File' to show the Create WFI form.
2. Enter the *Map Id* that relates to your custom alerts.
3. The default path shown should be taken in most cases. This path points to a WFI template that will be used to build your custom WFI file.



4. Add a short description of this map, version and date in the corresponding areas.
5. Select the *Include* box for applicable inclusion of objects needed for your custom map. The *Status* column will provide a status view during the file generation
6. You may enter an existing stored procedure in the *Post Import SP* area using the pull-down which will run a custom procedure after the creation of the WFI file
7. Press the *Generate File* button when ready and view the download status in the lower left of this form.

TIP: Using the default path provided in this form is a good way to keep all your IA transfer files in one logical place. The “IATransfer” directory is created in the install directory during the Info-Alert installation.

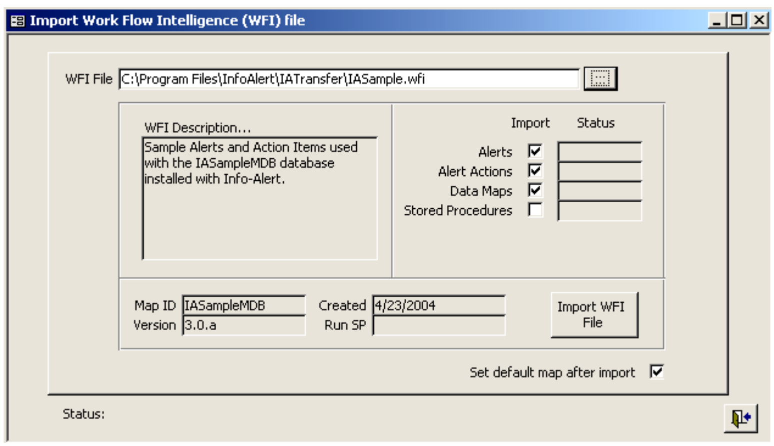
8. Once the WFI file has been created successfully, it can be copied from the *InstallDir\IATransfer* directory to any media of your choice for distribution to other Info-Alert Manager Environments.

WFI File Import:

1. From the “Alert Manager” menu, select ‘Configuration’, ‘Configuration Options’ and choose ‘Import WFI File’ to show the ‘Import WFI File’ form.

2. Browse to the location of your WFI File, which if provided by your software vender could be on a separate CD or floppy, verify its description, import objects and other details.

3. Select the ***Import WFI File*** button to start the import process.



4. View the import process status in the lower left of the form and press *OK* to the “Successful” message when complete.

5. Your custom alert package or “Work Flow Intelligence” package should now be ready for setup and use in the “Alert Manager” of this environment. Configure and use it as you would any other alerts

Using Stored Procedures

Overview:

One of the unique benefits of Info-Alerts Tool Kit and Alert Manager is in it's ability to use stored procedures to generate alerts.

As it applies to Info-Alert, a stored procedure can best be described as a custom program used to create alerts with complex logic. Most alerts are based on simple commands, ie Alert if balance less than 20 or Alert if SalesRep ID = 123 and sum of invoice amount > 100. This logic can easily be assigned using a single SQL command created by most report writers or query builders.

Using a stored procedure you can get considerably more complex in the logic you use to identify an alert condition. For example you could have an alert check your web based CRM database for any customers that have proposals outstanding for more than 20 days, then check your back office accounting system to verify there is not an outstanding balance for any of those customers more than 15% over their credit limit. For those who meet that criteria check a special promotions Excel sheet for each customer to determine if they should be suppressed from any new activity then generate an alert for those who meet those conditions.

Applying custom logic allows for considerable flexibility in alert generation but also requires technical knowledge to create stored procedures.

Creating a stored procedure:

Stored procedures may be locally created in the InfoAlert database or you can execute a remote stored procedure found in another database. You can open the local Info-Alert database by using MS SQL Enterprise Manager, (if you are licensed to run MS SQL Server tools), or by running the InfoAlertSP.ade program found in your installation directory.

NOTE: You will need a full version of MS Access 2000 or above to create and modify stored procedures.

Info-Alert ships with a sample local stored procedure called 'IASampleSP'. It is recommended that you use this as a template to copy from when designing any new SP's. There are basically two requirements that need to be included in each local stored procedure. First are the eight parameters that are passed in from the "Alert Manager", and second is the table that gets populated with the alert records at the end of the procedure. Table "tmpIAsp" must be populated with the result of the stored procedure.

If you would like to allow for the “Alert Manager” to have user defined selections that a user can easily control you should be sure to include the select logic found in the sample SP. A “where clause” is built based on the passed in parameters that can be appended to any of your select criteria in the procedure.

Issues and Exceptions

Excel Sheets:

Info-Alert has been tested with simple row and column spreadsheets. It is unknown at this time what effect Pivots, Graphs, formulas, and other special functions will do to the processing.

SQL Commands:

Info-Alert passes SQL Commands that are created using the Build Alerts function directly to your data source. Please note that the command syntax may need to change based on the type of data you are reading from. For example,

- Excel tables should be enclosed in brackets, ie Select AccountId, Balance from [Sheet1$] Where Balance > 20
- Dates in MS Access should be enclosed in pound signs, ie #12/15/02#
- Dates in MS SQL should be enclosed in single quotes, ie ‘12/15/02’
- Some ODBC drivers handle dates in a different way. Please check with the manufacturers documentation.

There are many other differences between data sources, please refer to documentation provided by the data source manufacturer for additional information.

Stored Procedures:

When using the ‘stored procedure template’ for Info-alert you must use SQL authentication when attaching to the data source. NT or ‘trusted’ authentication is not supported at this time.

Info-Alert Sample Reports

Alert Listing:

Prints a list of pre-defined alerts in your system.

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Alert Listing

Data Map: IA

Category: IA

Alert ID	Category	Description	Last Auto	Active	Hide
IA0001	IA	Show Active Alerts	1/1/1970	False	False
		Produce a list of active alerts. This alert can be used as a recurring reminder of the alerts that should be checked on a regular basis. If records are not being produced for an active alert it may require some adjustments to the criteria.			
IA0002	IA	Alert on error log entries	1/1/1970	False	False
		Produce a list of any error log entries for the current day. You would normally schedule this alert to run daily. It will notify you of any error log entries that were created today.			
IA0003	IA	Alert Activity	1/1/1970	False	False
		This will produce a list of alerts that ran today. You might use this for a short time to verify that alerts are being generated for the ones you have activated.			

Data Map: IASampleMDB

Category: Sample

Alert ID	Category	Description	Last Auto	Active	Hide
S00001	Sample	Alert for invoices past due by x days	1/1/1970	False	False
		This alert will notify you when invoices are still open beyond the selected number of days.			

Alert History:

Info-Alert keeps a history of generated alerts and notifications. The history is saved for at least 90 days or more based on the settings found in the 'Administrative Info' screen.

Thursday, December 25, 2003 10:14 PM | Info-Alert | Page 1 of 1

Alert History Report

Alert	Date	Alert Text	Selection Group
Start Alert: I00012			
I00012	12/23/2003	Customer Altos Servers Company has invoice number 081000000001, dated: 8/10/2002 with a balance of 562.9 over alert days.	Group 1
I00012	12/23/2003	Customer Altos Servers Company has invoice number 081000000002, dated: 8/10/2002 with a balance of 4091.93 over alert days.	Group 1
I00012	12/23/2003	Customer Altos Servers Company has invoice number 081000000003, dated: 8/10/2002 with a balance of 562.9 over alert days.	Group 1
I00012	12/23/2003	Customer Beta Dynamics Inc. has invoice number 081000000004, dated: 8/10/2002 with a balance of 565.54 over alert days.	Group 1
I00012	12/23/2003	Customer Celebris Systems has invoice number 081000000005, dated: 8/10/2002 with a balance of 560.25 over alert days.	Group 1
I00012	12/23/2003	Customer Altos Servers Company has invoice number 1, dated: 10/2/2003 with a balance of 36725.69 over alert days.	Group 1
I00012	12/23/2003	Customer Altos Servers Company has invoice number 2, dated: 10/13/2003 with a balance of 1125.79 over alert days.	Group 1

End of report...

You can also select to print a report for who was notified of each alert. A summary or detail option is available.

Defined Reports List:

This report produces a list of the reports that are defined for use with Info-Alert. The reports can be used along with, or in place of sending alerts via email.

Thursday, December 25, 2003 | **Info-Alert** **Defined Reports** | Page 1 of 1

Report Id	Description	Default Printer	Freq	Last Printed
Admin	Administrative Report	(Default)	D	12/23/2003
Mgr	Manager	(Default)	D	12/23/2003
Sales	Sales Report	(Default)	D	12/23/2003

Data Source List:

Produce a list of the defined data sources on your system.

Thursday, December 25, 2003 | **Info-Alert** **Data Sources** | Page 1 of 1

Id	Name	Type	Server/Name/Path	Database	Login	Map Id	File
abc	Credit Hold Database	M2	D:\Program Files\InfoAler			test12	CreditHold.md
CP3	CPU 2003 Payroll Data	S1	NTBK3500\Traverse	CPU2003		Traverse 10x	
CPU	CPU Sample Data	S1	NTBK3500\Traverse	CPU		Traverse 10x	

Alert Setup List:

Use the Alert Setup List to provide current configuration information for each of your active alerts.

Thursday, December 25, 2003 **Info-Alert** Page 1 of 1

Alert Setup and Notification

Alert ID	Seq	Selection Group	Data Source	Action ID	Max Email	Max Rp	All Selected
I00001	1		CPU				False

Selection 1: **Logic 1:** 45 **Individual Selections**

Selection 2: **Logic 2:**

Notification	Type	Email or Report ID
	E	tonym@ics99.com
	R	Admin

Action Settings For Alert: I00001

End of Alert: I00001

Activity Report:

Info-Alert creates log entries each time the automatic server runs. By printing the activity report you can verify that each of your selected alerts are running when scheduled.

Thursday, December 25, 2003 **Info-Alert** Page 1 of 1

Activity Log

Seq	Date	Time	Level	Activity Infomation
12975	12/23/2003	8:49 PM	1	Start Flag Alerts (A)
12976	12/23/2003	8:49 PM	1	Flagged (2) Alerts, Start Alert Logic (B)
12977	12/23/2003	8:49 PM	2	Start processing alert I00001
12978	12/23/2003	8:49 PM	2	Processed 54 records for alert I00001
12979	12/23/2003	8:49 PM	2	Finished processing alert I00001
12980	12/23/2003	8:49 PM	2	Start processing alert I00012
12981	12/23/2003	8:49 PM	2	Processed 7 records for alert I00012
12982	12/23/2003	8:49 PM	2	Finished processing alert I00012
12983	12/23/2003	8:49 PM	1	Alert Logic Complete, Start Notification Files (C)
12984	12/23/2003	8:49 PM	1	Notification Files Complete, Start Emails (D)
12985	12/23/2003	8:50 PM	1	Generate Emails Complete, Start Reports (E)
12986	12/23/2003	8:50 PM	1	Reports Complete, Start History Update (F)
12987	12/23/2003	8:50 PM	1	History Update Complete, Do auto purge (G)
12988	12/23/2003	8:50 PM	1	Purge Files Complete, Do alert suggestions (H)
12989	12/23/2003	8:50 PM	1	Alert Suggestions Complete, Do Generate Action Emails (I)
12990	12/23/2003	8:50 PM	1	Generate Action Emails Complete, Start Generate Action Faxes (J)
12991	12/23/2003	8:50 PM	1	Generate Action Faxes Complete, Start Generate Auto Programs (K)
12992	12/23/2003	8:50 PM	1	Generate Auto Programs Complete, Processing Complete...

End Of Report...

Examples - Info-Alert Examples

Action Overview

Now that you have alerts configured and running you may want to take the next step in the alert process and have Info-Alert automatically take a specific action. Such as:

- Now that your Purchasing department has been alerted to an ordered item that has not been received by it's expected ship date you might want to have Info-Alert email a custom message to your vendor requesting a shipment status.

Or

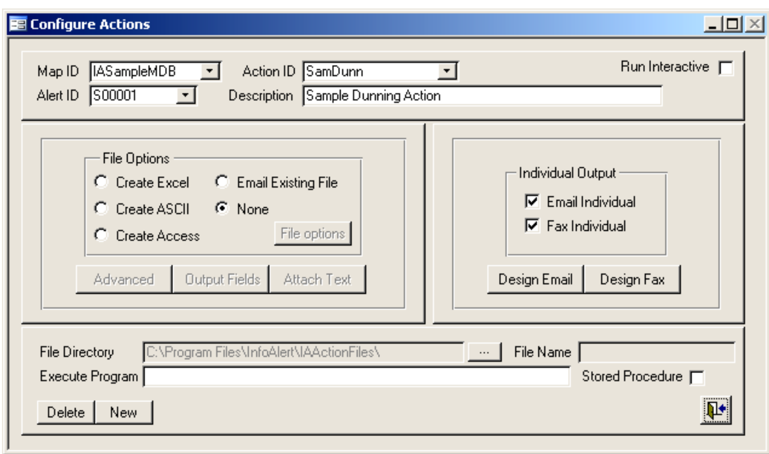
- Now that your Accounts Receivable Department has been notified of customers that are delinquent in payment you might want to have IA email a custom 'Dunning Letter' to your customer requesting the status of the indicated invoices.

Info-Alerts Take Action utility can be easily configured to take an action based on the results of an individual alert to send a custom fax or email, create a table in an MS Access database or an ASCII file upon which a custom program or SQL Stored Procedure might run against, then in turn update another database. Or any combination of the above.

Action Example 1: Automatically email a 'Dunning Letter' to customers that are delinquent with payments and also create an Excel spreadsheet for additional evaluation and reporting.

Use the following example as a guide for how you might configure a 'dunning letter' to be emailed to your customers and have an Excel spread sheet created based on results from alert S00001.

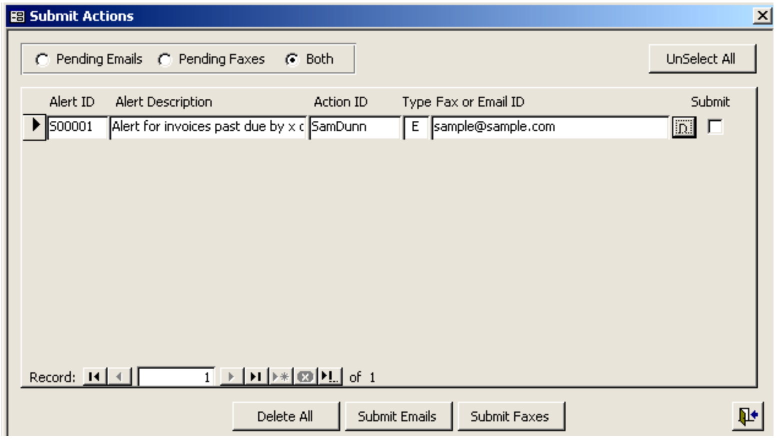
1. From 'Configuration-Action and Events', select 'Configure Actions' to view the Configure Actions screen.



2. Using the pull-downs choose the Map ID, Alert ID, and Action ID as shown above. The description and configuration of this pre-configured sample action will be shown.

- **NOTE**: When setting up a new action you would select the appropriate Map and Alert ID's and enter in an Action ID and Description that best references your action.

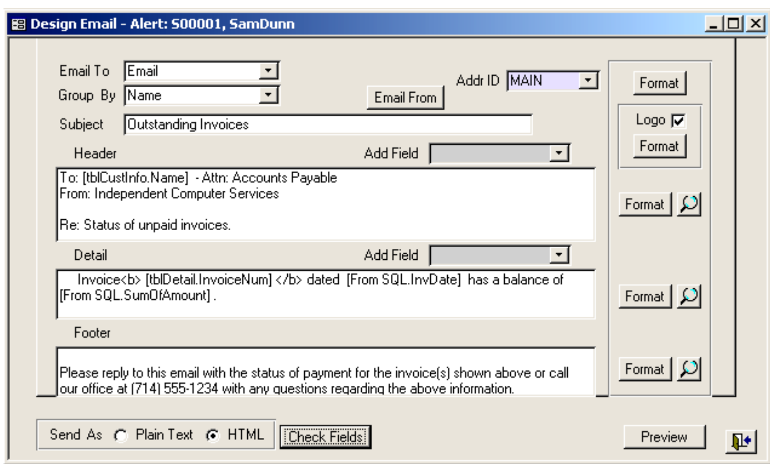
3. Use the *Run Interactive* check box at the upper right of the 'Configure Actions' screen to allow for user interaction of Fax and Email prior to sending. These pending messages can then be viewed and managed, as shown here, by selecting the 'Submit Actions' function under 'Configuration', 'Actions'.



4. Actions can be selected and marked for delivery, unchecked and held, or deleted.

TIP: Use the 'Action Exceptions' function from the 'Configuration-Actions & Events' to list ID's that should never get an email or fax.

5. In this sample action 'Email' Output has been chosen and can be configured by clicking the *Design Email* button to the right of the form. Here you can view the layout options for customizing your Email as shown.



6. Use this *Design Email* form to layout your Email just as you would design an Email letter. Select the *Email* field and appropriate *Address ID* from the pull-downs. Also enter a subject line.

NOTE: Use the *Email From* button to provide a custom mail 'From' address.

TIP: Use the 'Action Address' button from the 'Configure', 'Actions' menu to create your own company *Address ID*, or double click into this field to drill down.

7. Use the *Group By* pull down to enter a valid field name with which to group the Email output.

8. Use the *Header* area to enter typical header information such as: To: Company Name, Attn: Customer Name, and the From: Your Name. This can also be the place to include the reason for the Email or fax.

9. The *Detail* area is used by Info-Alert to list the results of this alert. In the example above, the indicated customer will be alerted to one or more invoice numbers and their dates that have a balance due.

10. Use the *Footer* area for any additional information that would follow the detail area on the faxed output.

TIP: Inside any numeric field, such as [From SQL.SumofAmount], insert a comma and number to format the output decimal places. (i.e. [From SQL.SumofAmount,2] which would be shown as xxxx.xx).

TIP: Use the *Format* button on any of the areas to adjust the formatting. Also, use the magnifying glass button to enlarge the view of any area.

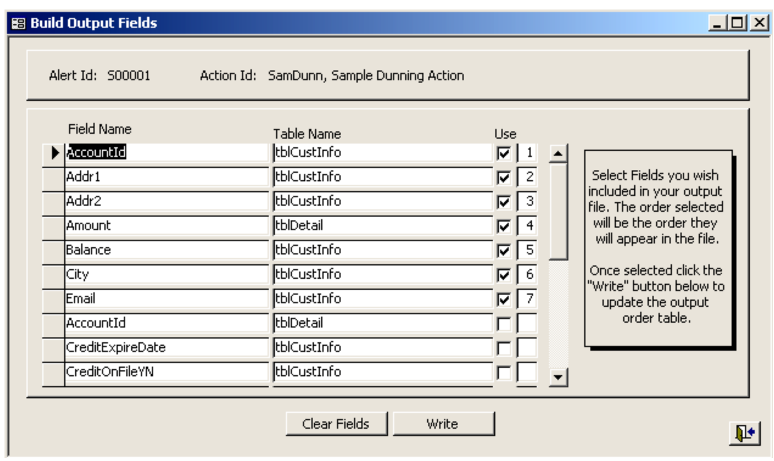
11. Verify the ‘look and feel’ of your Email layout at any time by clicking the *Preview* button at the bottom of the form.

12. Use the *Email To* button to direct your email or fax to a email address or fax number other than what would be found in the database. This can be handy for testing your action output or to override the output info in your data.

NOTE: Use the *Design Fax* button from the ‘Configure Actions’ screen to layout your fax in much the same way as we did here with the email design.

TAKE ACTION NOTE: All ‘Take Action’ faxes and emails are queued on the IA server and will actually be sent based on the IA Server Schedule.

13. To setup the Excel spreadsheet output of our sample Action we need to indicate what fields from the alert results we want shown. Use the *Select Output Fields* button from the ‘Configure Actions’ screen to view and select the fields available for this alert.



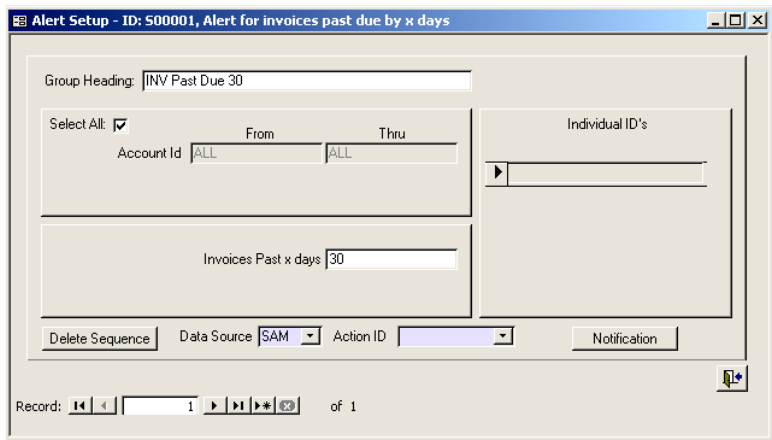
14. Once the *Output fields* have been selected, use the area at the bottom of the ‘Configure Actions’ screen to indicate the appropriate path and filename.

TIP: The default path points to an existing directory created during the Info-Alert installation, using this path ensures all your ‘Take Action’ files will be in one location.

Action Example 2: Action to update a 'credit hold' flag in our accounting software.

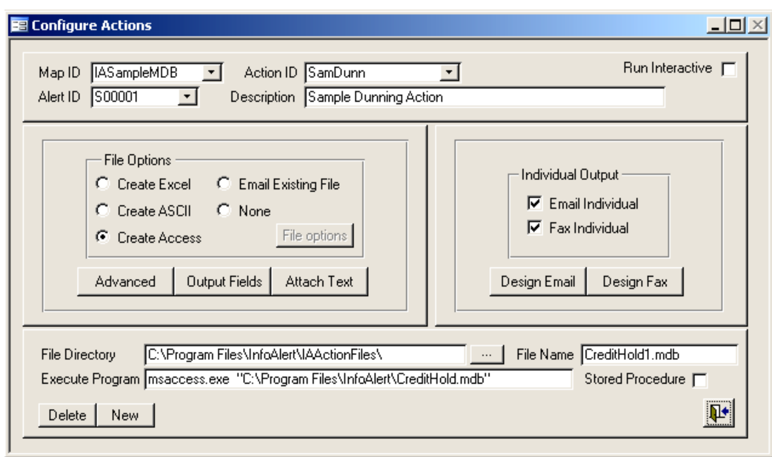
Another advanced feature of Info-Alert is its ability to execute programs that take action on the alerts being generated. This feature is normally used with the ***File Output*** option of 'Configure Actions'. An example of how this feature might be used is shown below.

This example will show how a program can be used to automatically put customers on credit hold and create comments in your CRM or Contacts tables for future reference.



1. The first part of this example is to setup an alert that will identify customers who should be put on hold based on criteria you create.

2. Using alert ID S00001 we have assigned an Action ID of "CreditFlag" this instructs Info-Alert to run the actions identified in the Action Screen shown below.

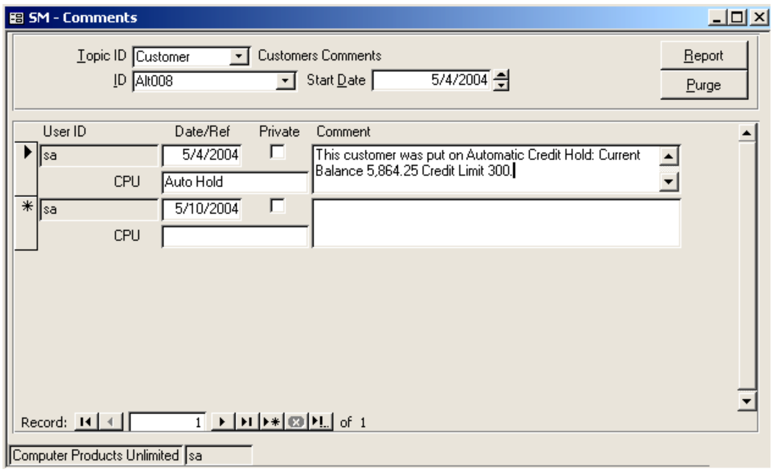


3. We have asked the program to create a table called "tblCreditHold" in an MS Access database "CreditHold1.mdb", found under the directory "c:\Program Files\InfoAlert\IAActionFiles\".
   Note: the table name tblCreditHold is identified using the *Advanced* button. The fields we would like to see in the table are identified using the *Select Output Fields* button.

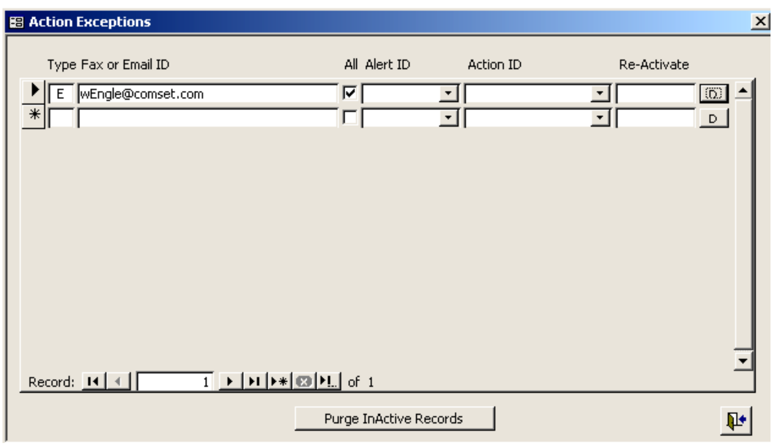
4. Once the table is created we have instructed the system to execute another program to act upon the data. In this example you will notice under the "Execute Program" heading we will run msaccess.exe and have it auto start the CreditHold.mdb database.

5. The CreditHold.mdb database is configured to auto run a module called modStartup. This module will open a connection to the accounting data, then by reading the table created by your alert, will update the credit hold flag in the customer record and insert a comment in the Comments table indicating that the customer was placed on credit hold today.

6. Sample credit alert message automatically generated by Info-Alert within your accounting database.



7. The ‘Actions Exceptions’ screen shown here provides an easy way to suppress the sending of email or faxes to certain ID’s, by entering the ‘type’ and the appropriate ID (email address or fax number) for the targeted recipient. This can be very handy when there are one or more recipients you do not want to bother by an alert action.



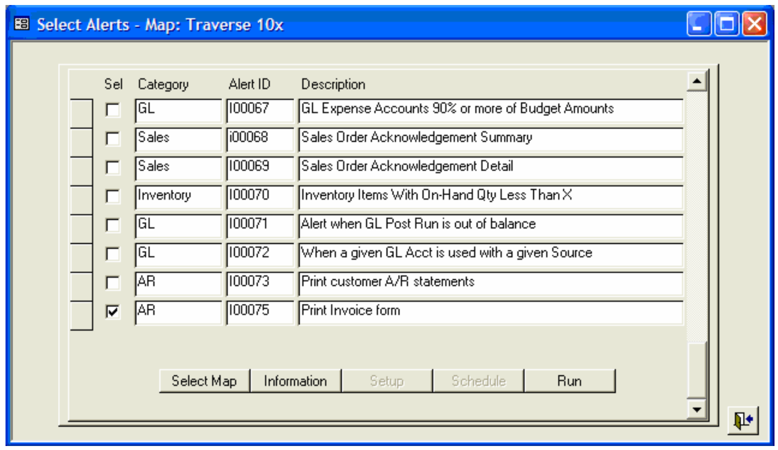
Use these examples to now create additional ‘Actions’ based on your business needs and the alerts you have chosen for your data.

Action Example 3: Email or Fax Customer Invoices using IA Templates and the 'Print Invoice Alert'.

Overview:

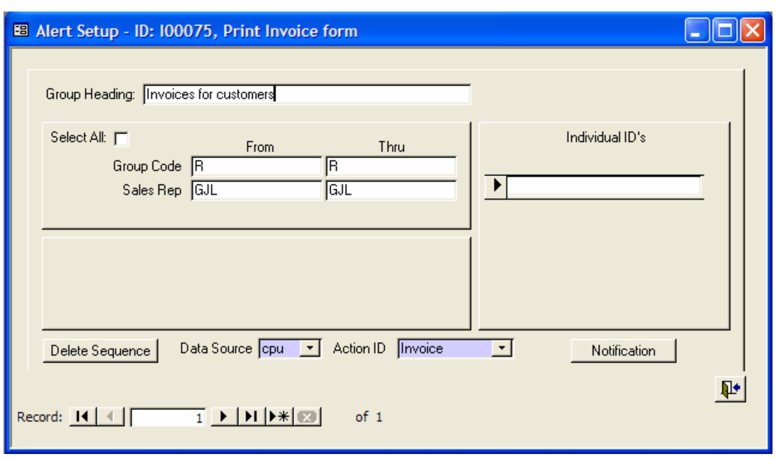
An Info-Alert template is an Access Report designed to print Alert data in a more formatted layout.

1. An alert is available to pull data out of Traverse on a scheduled basis and pass this data to the invoice template for deployment to your customers and/or sales reps. Selection criteria may be filled in to selectively determine which customers are to receive electronic invoices.



2. After selecting the Print Invoice alert, selection criteria may be entered.

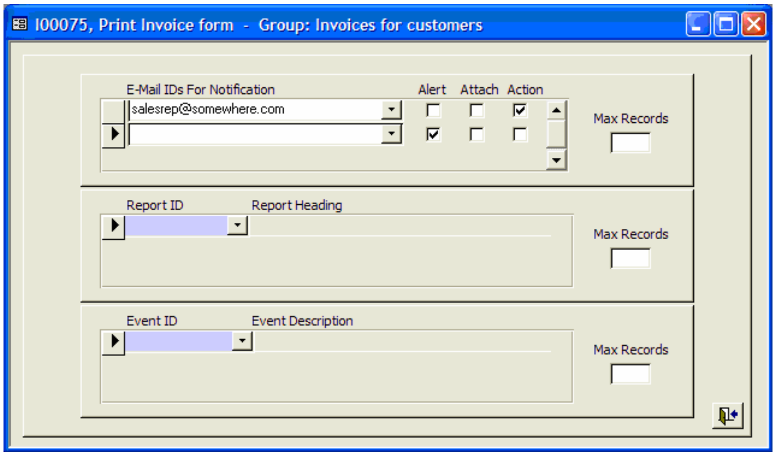
3. By default, selections are available by Group Code and Sales Rep. These fields can be changed to fit individual needs. A sample use would be to set customer group codes to a "9" for any customer you wish to receive emailed invoices. This way you only need to add that group code on a customer for them to receive electronic invoices rather than setting up new criteria in Info-Alert.



NOTE: Info-Alert would be scheduled to run at such a time where printed invoices are in the Sales Order transaction file but prior to posting. One possible scenario would be to schedule Info-Alert to send electronic invoices in the evening, then post completed invoices in the morning. You could also schedule Info-Alert to look for and send invoices on an hourly basis, every 30 minutes, etc.

NOTE: Info-Alert assumes that invoice numbers have been assigned prior to sending.

4. Info-Alert will pull email and fax ID's from the customer file and also allow for email copies to be sent to other contacts, ie sales reps or rep groups, using the alert notify screen as shown here.



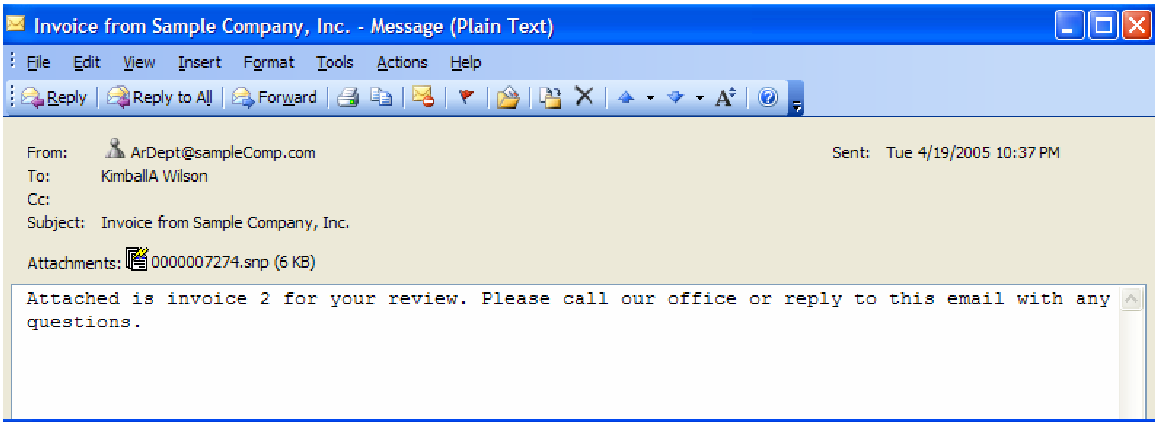
5. Back to the 'Action Screen' - You can format the text body of your email including data fields from the alert; like 'Invoice Number' and 'Date'.

6. Multiple actions can be created if you would like different messages for different groups of customers.

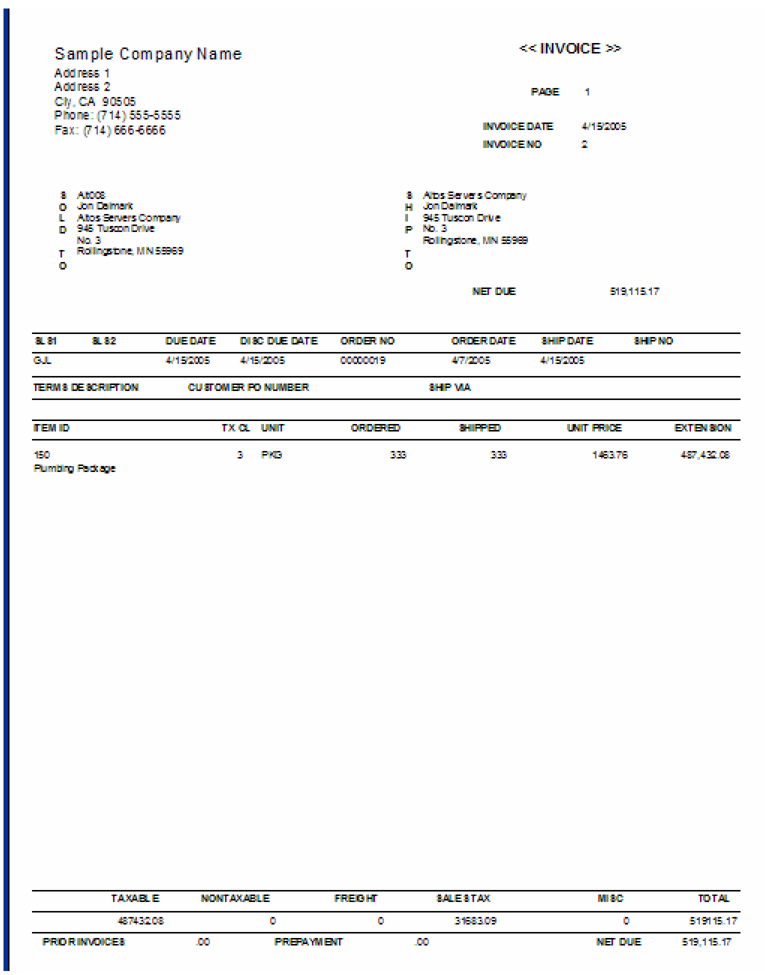
7. You can set the Email "Reply To" address to anyone in your organization to make sure reply's go to the right individual.

8. Following are samples of the email and attachment that would be sent by Info-Alert using the Template to any customers that meet the criteria of the 'Print Invoice Alert' that you set up.

Sample email header:



Sample Attachment:



Sample Company Name
Address 1
Address 2
Cly, CA 90505
Phone: (714) 555-5555
Fax: (714) 666-6666

<< INVOICE >>

PAGE 1

INVOICE DATE 4/15/2005
INVOICE NO 2

SOLD TO
At008
Jon Dalmark
Altos Servers Company
945 Tuscon Drive
No. 3
Rollingstone, MN 55969

SHIP TO
Altos Servers Company
Jon Dalmark
945 Tuscon Drive
No. 3
Rollingstone, MN 55969

NET DUE 519,115.17

SL S1	SL S2	DUE DATE	DISC DUE DATE	ORDER NO	ORDER DATE	SHIP DATE	SHIP NO
GJL		4/15/2005	4/15/2005	00000019	4/7/2005	4/15/2005	

TERMS DESCRIPTION	CUSTOMER PO NUMBER	SHIP VIA

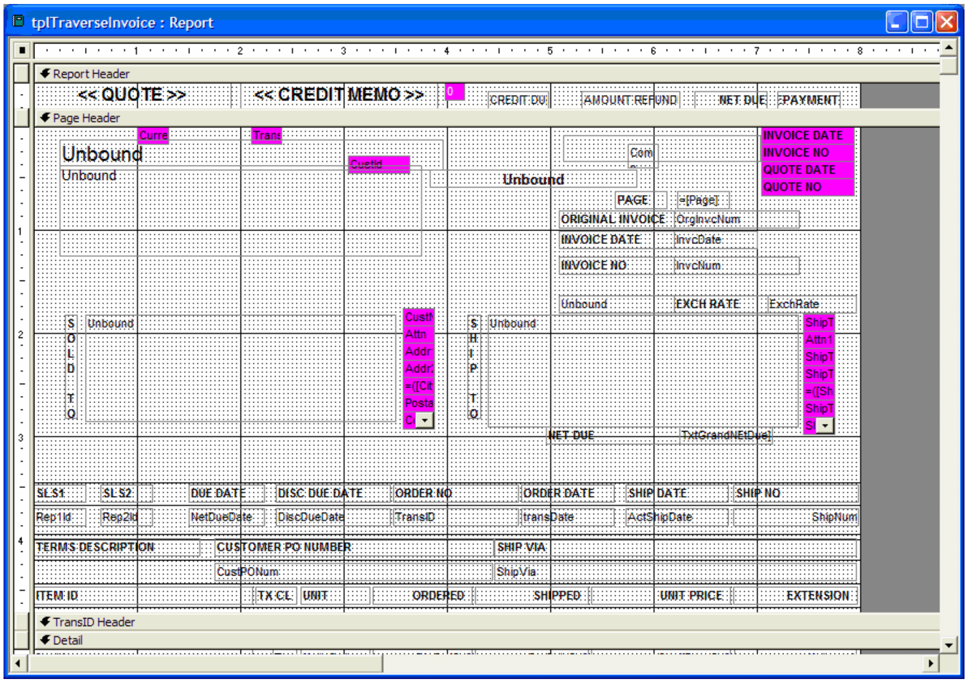
ITEM ID	TX CL	UNIT	ORDERED	SHIPPED	UNIT PRICE	EXTENSION
150 Plumbing Package	3	PKG	333	333	1463.76	487,432.08

TAXABLE	NONTAXABLE	FREIGHT	SALES TAX	MISC	TOTAL
487432.08	0	0	31683.09	0	519115.17

PRIOR INVOICES .00 PREPAYMENT .00 NET DUE 519,115.17

NOTE: Currently, invoice templates do not show serial numbers or kit detail for those using serialized items or kitting.

Adjust format using Tool Kit:



Using the Info-Alert Tool Kit, along with MS Access, allows you to change template layout and design. Because of this, the options are almost limitless in regards to making additions, adjustments, or creating whole new templates all of which will enhance the way you do business and the way your customers will view your business.

So use the 'built-in' Template Design utility within IA Toolkit to make a copy of this 'Invoice' template and start adding your logo, add some fields, or just re-arrange the existing layout to suit your business needs. When you're done, you can run a test to show the results and then publish to the IA Manger. Now you are ready to use your new template in a live environment.