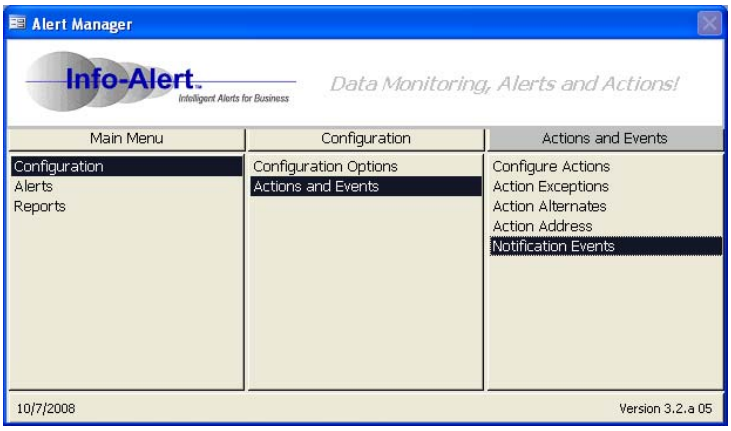
Notification Events: Adjust Tables

Info-Alert has the ability to not only alert us when critical conditions exist that we should know about but it can actually take action on our behalf in certain situations. One of the functions that can be configured to help us out is Info-Alert's "Notification Events".

Notification Events are automated functions that occur when an alert condition is met. For example if you have an alert that checks for open sales orders with a gross margin less than 15% you can have an event that will move those sales orders to a new batch called "Review". This allows you to review those orders prior to posting to make sure costs and prices were accurately assigned.

In another example you might have an alert that keeps an eye on credit conditions for your customers. Any time a customer meets certain conditions and is not already on credit hold you might want an email sent to you're A/R or credit department. With notification events, after the alert is generated Info-Alert can also change the credit hold flag in the customer record for you.

Example:
The following example will change a sales order's batch ID to "Review" if the Gross Margin is less than 10%. It is assumed that a batch called "Review" has already been created in your accounting system. We will be using an existing alert in our example that has already been configured to check for orders with gross margins less than X.

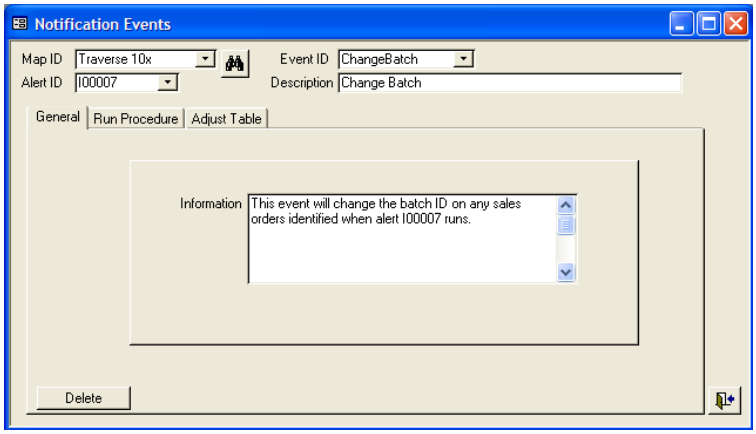


From the Alert Manager main menu select "Notification Events". We will be creating a new event to update sales orders.

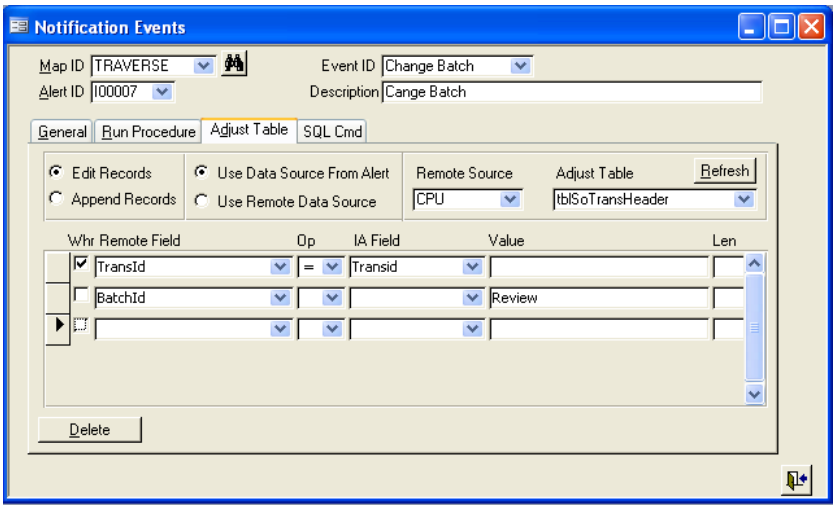
Once selected put in the Map ID you are working with and the alert ID that this event will be based on.

Note: The event we are creating will act on data generated by the alert it's associated with. An event by itself will generally not run queries and return records but it can.

Create a unique Event ID and Description for your event. Use the information section to describe what this event is designed to do.



Select the “Adjust Table” tab to configure the event to update a table. Select the option to “Edit Records” vrs “Append Records”, this tells Info-Alert you want to change something in an existing record in your database rather than add a new record. You may want to use the “Append Records” function when creating new notes or activity records.



Notice the option for “Use Data Source From Alert” is selected. This tells Info-Alert what data source should be used to find the table shown in the “Adjust Table” field.

With the selections shown here, Info-Alert will update the tblSoTransHeader table found in each data source passed to it in the alert criteria setup.

If you want to update a table in a certain database no matter which data source is used for your alert you should use the selection “Use Remote Data Source”. With that selection Info-Alert will always update the table found in the “Remote Source” database. You may want to use this option to update a common CRM database or System database no matter what source is used for your alert information.

Remote Source:
We need to enter a data source where we can find the table we are going to adjust, If we select the “Use Data Source From Alert” option the source we use in the “Remote Source” field is only required to set up this notification event, the table that actually gets updated will be found in the alerts data source. If we select the “Use Remote Data Source” option the source used in this field will always be used for notification updates.

Adjust Table:
This is where we enter the table that will be adjusted. The tables shown in the combo box pull down will come from the “Remote Source”, press the “Refresh” button to refresh the table list.

Whr:
The “Whr” check box is used to indicate that this is a WHERE condition used to identify the record, (or records), to be updated. In the sample above the “Whr” check box is selected for the first line – we are telling Info-Alert to update “tblSoTransHeader” where the “TransID” field in “tblSoTransHeader” matches the “TransID” returned in our alert. Note: We can use multiple lines to indicate a more unique WHERE condition, for example we could use a second line where we select “CustID” from “tblSoTransHeader” = “CustID” returned in the alert. In our example the “TransID” field is unique so we do not need to add a second where condition. If the “Whr” check box is not checked we are indicating that the “Remote Field” should be updated or changed.

Remote Field:
Select a field found in “tblSoTransHeader” to be used in the Where condition or to be updated (Depending on the condition of the “Whr” check box). In our example above on the second row we have selected to update the “BatchID” field in “tblSoTransHeader” with the value “Review”.

IA Field:
These are fields available in the record set returned by the alert. In the example shown above on the first row we have selected the “TransID” field from our alert to match with a “TransID” in our sales order table. In the second row we have bypassed the “IA Field” because we wanted to change the “BatchID” field to a value we will pass in.

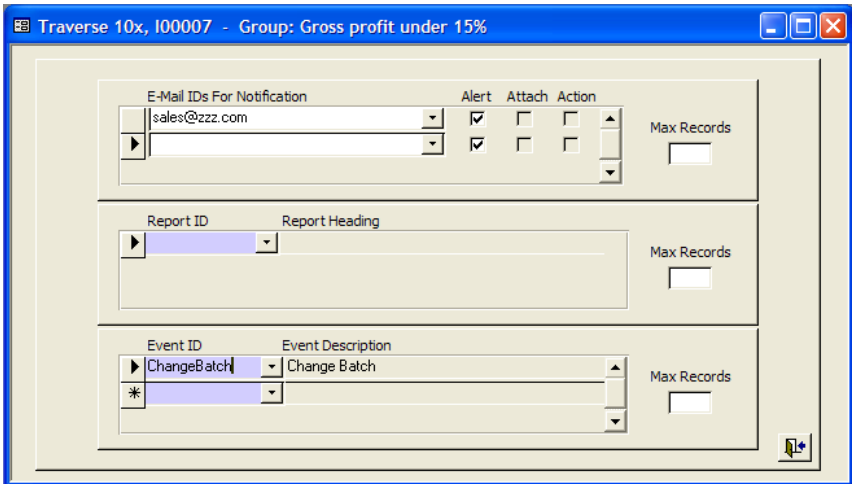
Value:
The value field is where we will tell Info-Alert what value to update the remote table field with. In the example shown above we have indicated that we want the value "Review" to be placed in the "BatchID" field found in the "tblSoTransHeader" table. Note: In some data sources you will need to use the values of 1 and 0 to control check box or Yes/No fields in your remote data.

Len:
If we are using the "IA Field" to update a field in your remote data and you only want to use a certain length you can indicate this in the "Len" field. For example if we want to use the "Alert Text" returned from our alert to update a comments field but the comments field in our remote data will only hold 100 characters we can set our length to 100. This way Info-Alert won't try to write more than 100 characters into the remote field, (causing an error).

In the example shown above, if we wanted to update another field in "tblSoTransHeader" we could add a third line to the field list and indicate what field to change and the value to pass.

Once you have your event created you would add it to the notification section on any alert sequence where you want the result of the alert sent to the notification event.

In our example when alert I00007 runs and finds any orders where the gross margin is under 15% those records will be passed to our "Change Batch" notification event and moved to a new batch.



CAUTION:
Info-Alert does not verify that the value you are entering into the "Value" field will be appropriate for the field type you have selected in the "Remote Field" column. It is **very important** that you verify the value you pass will be appropriate for the data source and table you are updating. In the example shown above it is important that we know there is already a batch created called "Review" in our source, Info-Alert will not create one. We also need to know that the "BatchID" field accepts a value called "Review". If the "BatchID" field only allows for 3 characters our value will cause an error when Info-Alert attempts to update the table.