Implementation of Alerts and Automated Tasks

Automated tasks and sending notification to associated recipient via E-Mail,SMS or DreamApps message is now easier and smarter.
Accessible through Home» System Administration» Automation and Resources.

Alerts

Alert can be generated when user performs any action say, clicking Add/Update or Confirm on screen. And associated recipients are notified via E-Mail,SMS or DreamApps message as preferred in the Alert Setup.
To setup an Alert we need to know:

1. Site Name:Site under which the notification is applicable. (e.g.:ERP)
2. Page Name. (e.g.:opord)
3. Command Button and Tab name, Separated by "|". (e.g.: Add|Details)
4. Sender (e.g.:asok@dreamapps.com)
5. Template (i.e.: The format file used to send the notification. Files with extension .email are listed)
6. Method (Selected Method is executed while sending the notification. Files with extension .email are listed)

Whenever user Adds a new record under opord page→Details tab, a notification is sent using selected .email format and executing selected method.
We need to create the recipient list also. To create recipient list we need to select:

- Appropriate recipient level (i.e: To/CC/BCC)
- Notification media (e.g.: Email, SMS, Site. More than one can be selected)
- Recipient

Recipient can be a DreamApps Username or email address or a formula.
Formula is used when recipient can only be determined run-time (e.g: Notification to inform the salesperson for this Customer when Sales Order is created.) System can only know the recipient, when user enters a Sales order.
e.g.: *zxusers.zemail("xname=' "+oporddel.xsp(xordernum)+" ' ")*

Automated Tasks

Tasks can be automated without user doing any action n DreamApps. A method is scheduled to run periodically.
To setup an Automated Tasks we need to know:

1. Owner/admin username (e.g.:asok@dreamapps.com)
2. Sequence of the task in relation with other automated tasks (e.g.: 1/2/3)
3. Method to executed. (e.g.: chkdob which checks for date of birth)
4. Time Scheduled. Starting Time of execution (e.g.:17:00)
5. Time Interval. Interval between two executions. (e.g.: 00:30.)

System will execute chkdob method after every 30 mins starting from 17:00.

Combination of Alert and Automated Tasks

Generating Alerts even without the user performing any action is also possible by combining Automated Tasks and Alert. Say, stakeholders needed to be notified if a Sales quotation is not Approved within 3 days of creation. To achieve that:

- An Automated Tasks is prepared using appropriate method and time schedule. e.g.: opqotnotify at an interval of 3 hours.

An Alert entry should be prepared selecting:

- Page: *Custom*. As no screen/page is responsible for the alert to trigger
- Command|Tab should contain the #alert name specified under the automated method. As no tab and command button triggers the alert, rather an automated task does.
- Select Sender (e.g.:asok@dreamapps.com)
- Select appropriate notification format. (e.g.: opqotnotify)
- Method should be cadummy.
- Recipient list should be prepared as per specification.

After every 3 hours, system will check for any quotation which is not approved within 3 days of creation and notify the specified stakeholders.

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