



TIPS AND TRICKS

How to set up alerts for 'Task' Activities?

When creating an Activity in the Business Partner Master Data -> Activity, SAP Business One allows a user to set a trigger for an alert for a reminder to be sent to the user. This applies to the activities Phone Call, Meeting, Note or Other. Simply place a tick in the checkbox for 'Reminder' and define when this reminder should happen. Note however that a reminder cannot be set when an activity is a 'Task'.

When an alert is needed for an Activity that is a 'Task', the following workaround can be used to achieve this:

The screenshot shows the 'Activity' dialog box with the following details:

- Activity:** Phone Call
- Type:** Phone Call
- Subject:** Meeting
- Assigned To:** Task
- Personal
- Number:** 35
- BP Code:** [Empty]
- BP Name:** [Empty]
- Contact Person:** [Empty]
- Telephone No.:** [Empty]
- Remarks:** [Empty text area]
- Start Time:** 18.09.08 15:35
- End Time:** 18.09.08 15:50
- Duration:** 15 Minutes
- Priority:** Normal
- Meeting Location:** [Empty]
- Reminder:** 15 Minutes
- Inactive
- Closed
- Buttons:** Add, Cancel, Follow Up

Note however that a reminder cannot be set when an activity is a 'Task'.

Activity: Task
Type: General
Subject:
Assigned To: manager
 Personal
Number: 35
BP Code:
BP Name:
Contact Person:
Telephone No.:

General | Content | Linked Document | Attachments

Remarks:
Start Date: 18.09.08
Due Date: 18.09.08
Priority: Normal
Meeting Location:
Status: Not Started

Inactive
 Closed
Follow Up

Add Cancel

When an alert is needed for an Activity that is a 'Task', the following workaround can be used to achieve this.

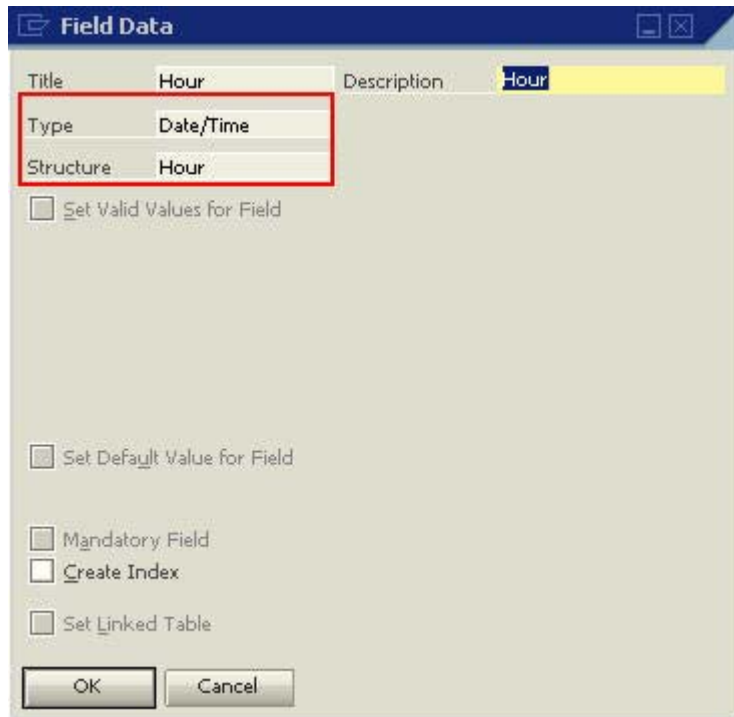
1. Create two user-defined fields (UDF) as follows:

U_Hour: 'Date/Time' Type and 'Hour' Structure

This field will hold the length of time prior to the appointment and at which time the reminder should be sent.

U_Reminder: 'Date/Time' Type and 'Hour' Structure

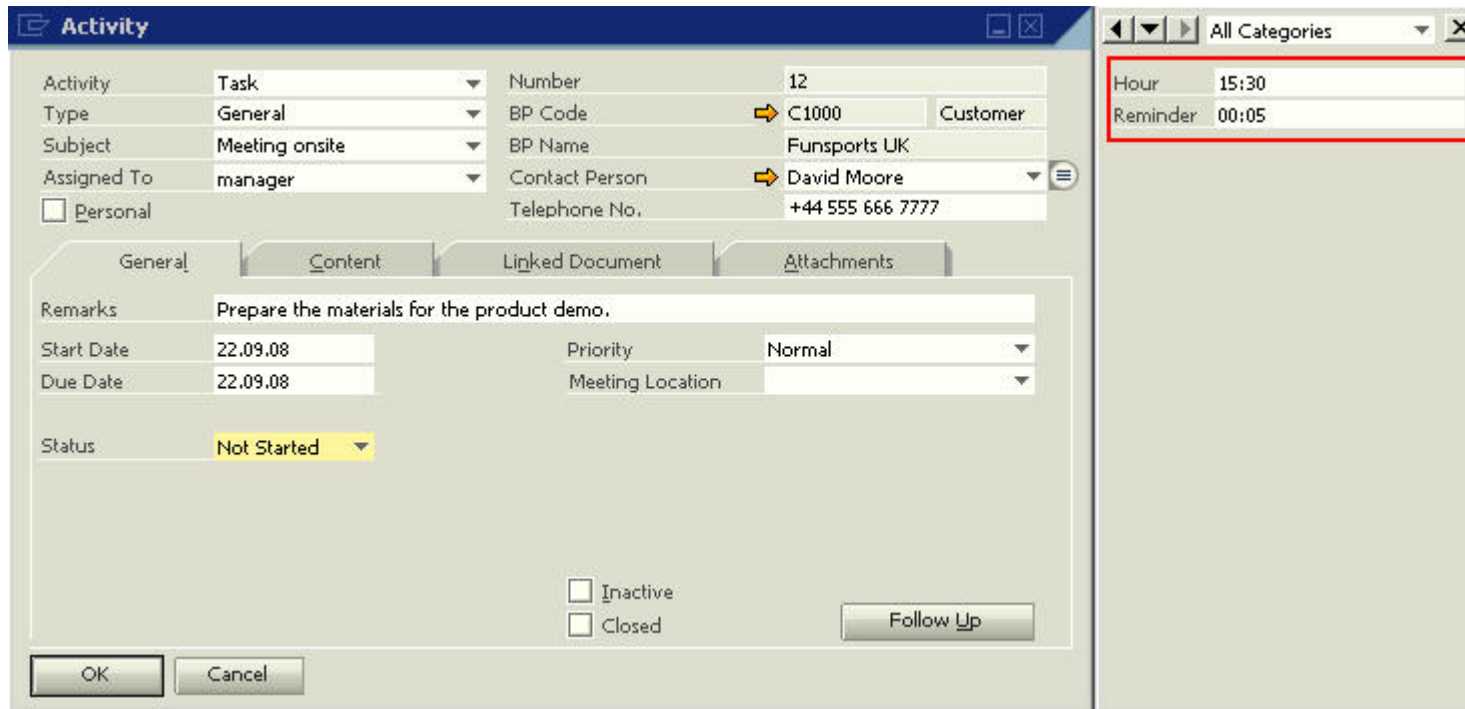
This will be used to indicate that a reminder must be set for this 'Task' Activity.



User-Defined Fields - Management

Category	Title	Description	Type	Dft	Mand.	Index	Linked Table
▼ Master Data					<input type="checkbox"/>	<input type="checkbox"/>	
▼ Activities					<input type="checkbox"/>	<input type="checkbox"/>	
	Hour	Hour	Hour		<input type="checkbox"/>	<input type="checkbox"/>	
	Reminder	Reminder	Hour		<input type="checkbox"/>	<input type="checkbox"/>	
Agent Name					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Business Partner					<input type="checkbox"/>	<input type="checkbox"/>	
Cargo Customs Declaration Nun					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Employees					<input type="checkbox"/>	<input type="checkbox"/>	
G/L Accounts					<input type="checkbox"/>	<input type="checkbox"/>	
Item Groups					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Items					<input type="checkbox"/>	<input type="checkbox"/>	
Price Lists					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Project Codes					<input type="checkbox"/>	<input type="checkbox"/>	
Sales Employee					<input type="checkbox"/>	<input type="checkbox"/>	
Users					<input type="checkbox"/>	<input type="checkbox"/>	
Warehouses					<input type="checkbox"/>	<input type="checkbox"/>	

OK Keys Add Remove



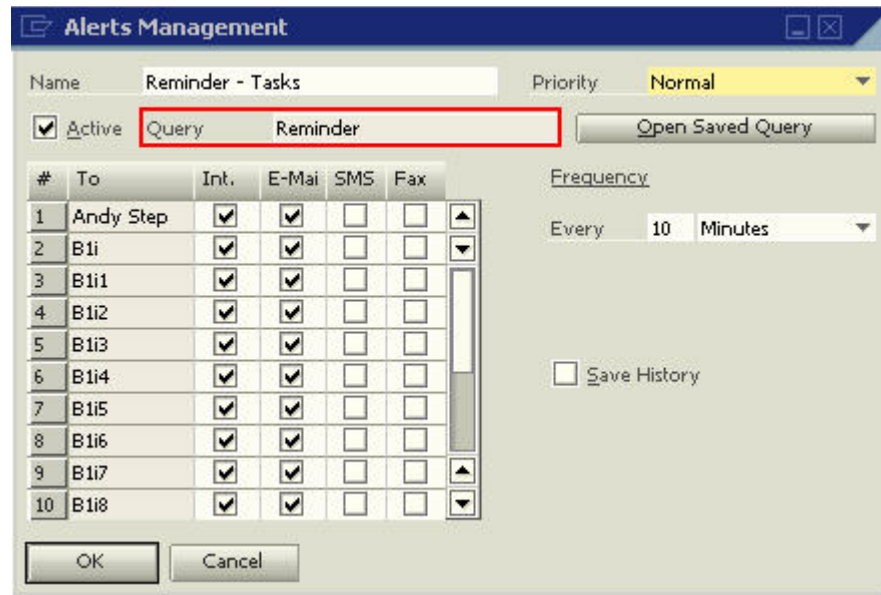
2. Save the query below in the Query Generator.

Select

Distinct T2.ClgCode,
 T2.CardCode,
 T2.ContactPer,
 T2.Tel,
 T2.Details

```
From
  OALT T0
  Inner join
  ALT1 T1 On
  T0.Code = T1.Code
  Inner Join
  OCLG T2 on
  T1.UserSign = T2.AttendUser
WHERE
  T2.Action ='T' and
  T1.UserSign is not Null and
  Convert(char,T2.Recontact,104) = Convert(char,getdate(),104) and
  T2.Closed= 'N'and
  Convert(char,(T2.U_hour -T2.U_Reminder),108)>= Convert (char,getdate(),108)
```

3. Set up an Alert using the above query. Indicate the SAP Business One users that should receive the alert.

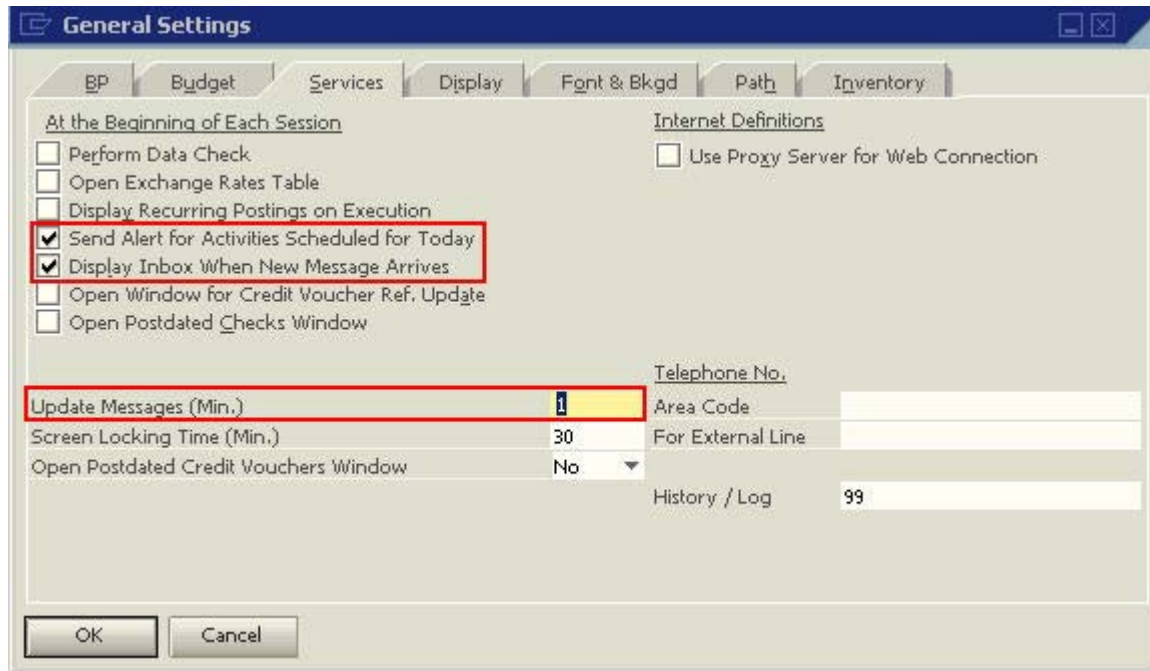


4. In the Administration -> System Initialisation -> General Settings -> Services tab window:

Tick the 'Send Alert for Activities Scheduled for Today' option.

Tick the 'Display Inbox When New Message Arrives'.

The number of minutes in the 'Update Messages' field should be set to a minimum to ensure frequent updates.



5. When a reminder for the 'Task' becomes due, an alert will appear in the 'Messages/Alert Overview' window.

The screenshot shows a software window titled "Messages/Alert Overview" with three tabs: "Inbox", "Outbox", and "Sent Messages". The "Inbox" tab is active, displaying a list of messages. The first two messages are highlighted in yellow: "Activities Scheduled for Today" and "Reminder Tasks", both dated 22.09.08 and from "Server". Below the message list is a table with the following data:

#	Activity Number	BP Code	Contact Person Name	Telephone	Details
1	12	C1000		+44 555 666 7777	Prepare the materials for the product demo.

At the bottom of the window, there are buttons for "Forward", "Reply", "Delete", and "Out of Office".