Setting Up Eagle Alerts

Eagle Alerts are handy messages that the system sends to users automatically such as Back Up Failed or Special Order Has Been Received.

In this course, we'll show that alerts are easy to set, how to assign profiles, and how to manage reminders.

Objectives

- Alert Setup
- Assign Profiles
- Reminders

Alert Setup

There are two parts to setting up Eagle Alerts: configuring the Alerts options and assigning the appropriate security bits.

Let's start with Options Configuration where you display only the options that relate to alerts.

The first option, number 3036, refers to the Stock Out Threshold.

This option determines when the system gives an alert that a particular item is out of stock.

This means that if the quantity on hand goes to zero or the order point is greater than the value set here, the system gives a stock out alert.

Typically, you'll leave the default value set at 1.

However, if you prefer to get Alerts only when the quantity on hand of a fast-selling item drops to zero, insert a larger number into the current value field.

This works because the order point for your best-selling items is much higher.

If you have iNet-Connect, option 3301 allows sending alerts via email.

To set this up, enter an email address in the current value field.

This address appears as the sender for all email Alerts.

If the system ever returns an email, it returns to the email address listed here.

 Note that this is only for the From address; you will enter the email addresses of the alert recipients later.

If using option 3301, consider also using option 3308 – Allow Epicor Software Corporation to receive your alert.

This option allows the system to send system alerts, such as those warning that a backup failed, to Epicor for monitoring.

Use option 3304, Number of days to keep current alerts, to tell the system how many days to keep the alert in the Current file until moving it to the historic file.

A common choice is five days. You can select anything between one and ten days.

The rest of the Alert options tell the system whether to record an Alert or not.

Some of these are related to optional customer software, and others may have no relationship to your business.

Because of this, it's important to review each Alert and decide whether to turn it on or leave it off.

One possibility is to turn on all the alert options and manage them in employee profiles, where you specify which employees receive which alerts.

We explain this in the Assign Profiles topic.

In addition to configuring the alert options, there are five security bits that control the ability to view or modify alert profiles and the alerts themselves.

They also control how the system creates and sends reminders.

Here's a tip!

Always review the Alert options after any Eagle Software upgrade.

New Alert options default to No.

This means that you will need to review the new options and turn on the ones you'd like to use.

Remember that if you turn on an alert, you also need to add the alert to the employee profiles responsible for monitoring the Alert.

Lastly, remember, when configuring options, select Change in the ribbon to save the new settings.

Assign Profiles

Once you have alerts and security configured, you can assign profiles to the employees who will receive the alerts.

There are no limits to the number of employees who have an alert profile.

Each employee can have a custom Alert profile but if they want to receive alerts, they must have a profile.

When logged in to the system, any Alerts assigned to your profile appear here.

Keep in mind that the alerts posted here at any given time vary based on who signed in. The profiles tell the system which alerts to post for each user.

There are only a few steps required to set up a profile.

Begin by opening the Alerts Viewer, then navigate to Maintain Alert User Profiles.

From the profile grid, select an employee for which to assign alerts.

Select the store where the employee works.

Enter a frequency at which to automatically refresh the employee's alerts.

For example, if you want to refresh the alerts every thirty minutes, enter 30.

Entering zero tells the system to not automatically refresh the alerts.

Next consider reminders.

If you plan to use them and want employees to receive the reminders in advance of the event, specify the number of days.

If using iNet-Connect and you want the employee to receive alerts via email, enter their email address.

Choose the alerts that you want the employee to receive.

There are many from which to choose and here are a few that you may find helpful.

Back up failed.

At least one key person from your store should receive this alert.

Assign it by selecting the Receive Alert field and choosing Yes.

If using iNet-Connect and you want to send the alert via email, select this option.

Other commonly used Alerts include:

Credit Settlement Failed

Special Order or Back Order item received

Quantity on Hand has gone zero or negative

Offline POS transactions exist

If you need more information to understand what a particular Alert does, highlight the alert, and look here for an extended description.

Remember to select Change in the ribbon menu to save the profiles.

Reminders

A reminder is a customized Alert that is a message sent to you or up to six other users.

The message might be a list of tasks to complete or a meeting time and place.

Reminders can be recurring, sent on a daily, weekly, or monthly basis, or they can be set up as a one-time message.

To assign and schedule reminders, you must have security bit 675 assigned.

Like alerts, you schedule reminders through the Alerts Viewer.

Open the Miscellaneous menu and select Schedule Reminders.

Type the reminder message.

The text you enter here displays on the browser Alerts page on the day you specify.

Enter additional information in the Notes field.

Select the employees you want to receive the reminder.

Set the date for the reminder.

There is no need to enter a time; the system delivers reminders by date only.

If you have a multi-store system, select the store for this reminder.

Enter any user codes that you want to use for filtering later, then press OK.

The system delivers the reminders to the basic Alerts screen and viewer.

Here are a couple of tips about reminders:

You can set up reminders related to vendors, such as a note to call a particular vendor, from the Go To menu of Vendor File Maintenance.

Unlike alerts, the system cannot email Reminders.

Recap

As you can see, Eagle Alerts are handy messages that the system sends to users automatically to help them stay on top of their business.

Taking time to review all the alert options can result in a big pay-off later, as employees learn to watch for alerts and act on them.

Setting up and using reminders is valuable as well, since it creates options to communicate with employees and vendors.

In this course, we showed how to set alerts, assign profiles, and how to manage reminders.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

EPICOR

Corporate Office	**Latin America and Caribbean**	**Europe, Middle East and Africa**	**Asia**	**Australia and New Zealand**
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298