

EMAIL ALERTS FOR AR, AP AND EFT VENDORS

BUSINESS REQUIREMENT

Client wants to send email notifications when details are changed for selected fields in AR Customer, AP Vendor and EFT Vendors

KEY LEARNINGS

Add email events and email messages

Link the events to the Sage 300 views

Requires Extender Configurator or Extender Developer

STEPS TO INSTALL AND CONFIGURE

- Import Email Alerts AR, AP and EFT Vendor module
- Restart the Sage desktop
- In Extender Events, open the ORCHID.ALERTLOGS.AREMAIL and change the email address to one you monitor
- Repeat for the other email events
- You can turn off the message that appears when the email is sent. Set *Notify User of Email Sent* to "No"

Extender Email events examples

The screenshot shows the 'ORCW01 - Extender Event Types' window. The 'Event' field is set to 'ID.ALERTLOGS.EFTCHANGEEMAIL'. The 'Description' is 'Email alert when EFT details change'. The 'Combine' dropdown is set to 'Combine'. The 'Action' dropdown is set to 'Send Email'. The 'Email To' field is 'test@orchid.systems'. The 'Email CC' field is empty. The 'Email Message ID' is 'ORCHID.ALERTLOGS.EFTV' with an 'Open' button next to it. The 'Notify User of Email Sent' dropdown is set to 'Yes'. There are two callouts: one pointing to the 'Email To' field with the text 'Set to your email address', and another pointing to the 'Notify User of Email Sent' dropdown with the text 'Set to No to remove message when email is sent.'.

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Set to your email address

Set to No to remove message when email is sent.

Save Delete Close

VARIATIONS

Refer to F1 help and online help

- You can modify the email template in Extender Setup > Email messages
- You can add the same event to more fields.