

Add Alerts

Alerts allow an automatic pop-up to occur when selecting a specific customer, supplier, stock item and other sections within the system.

When creating the alert it will be in an active state

If you want to remove the alert, make the alert inactive or Cancel the alert

Alerts can be created across the system for various document types

CRM Module > Activity > Alert Search

Edit Alert

Attachments

Memo

Close

Alert No:

A118

Date Time Created:

2024-03-06 14:48:46

Source Type:

Creditors

Action On:

All

Doc Type:

Purchase Order

Creditor:

CRO001 - CropSeed

Name:

CropSeed

Target User:

Otsile Loate

Active:

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Reference:

Order Delays

Notes:

Save And New

Save And Close

Save

Source Type	Select the source type you are creating an alert for on the drop down selection
Doc Type	Select the document type you are creating an alert for on a drop down selection

Creditor/ Debtor	Select the creditor or customer you are creating an alert for on a drop down selection This will change based on the source type selection
Target User	Select the user who must see this alert on the drop down selection. You can also send it to all users
Reference	Add alert search reference
Action on	Select when the alert must pop-up on the drop down selection
Name	The name of the creditor, Debtor or inventory item
Active	The tick means that the alert is active and no tick means that the alert is inactive

Revision #6

Created 27 July 2023 18:01:48 by Paige

Updated 14 May 2026 20:31:12 by Paige