

# ViewPoint EMessaging version 3 Events

Bob Sorrell  
Pivotpoint Southwest

February 20, 2003

## Contents

|   |    |
|---|----|
| Introduction.....   | 2  |
| Backordered Part – BACKORDER.....                             | 4  |
| Bill of Materials – BOM, standard .....                       | 5  |
| Customer Placed on Credit Hold – CUSTHOLD .....               | 6  |
| Kanban Replenishment – KANBAN .....                           | 7  |
| Material Received – REC, standard.....                        | 9  |
| Pointman Orbiter Failure – ORB, standard.....                 | 10 |
| Purchase Order Creation – PO, standard .....                  | 11 |
| Purchase Order Material Receipt – POREC, standard.....        | 12 |
| Sales Order Creation – SO, standard .....                     | 13 |
| Sales Order Placed on Hold – SOHOLD .....                     | 14 |
| Shipment – SHIPMT, standard.....                              | 15 |
| Shipment with Tracking Information – SHIPTRACK, standard..... | 16 |
| Shipment by Federal Express – FEDEX, standard .....           | 17 |
| Shipment by UPS – UPS.....                                    | 18 |
| Task Queue – TASK, standard .....                             | 19 |
| Voucher Creation – VCHR, standard .....                       | 20 |
| Notes .....   | 21 |

## Introduction

The ViewPoint E-Messaging System (EM) detects specific events occurring within a Pointman database and stores a message along with email addresses and other pertinent information. By default, an email message is sent, but this may be suppressed. The recipient (target) can be an email address associated with the event or specified by the system administrator. Version 3 polls the database for events selected by and at a frequency set by the EM administrator. A maximum rate for messages sent can be set by the administrator to keep the local email system from becoming overwhelmed.

The events are defined by a series of Oracle views, which allow the messages and event monitoring to be customized without recompiling any code (except the view).

The EM administrator can specify a custom preamble and/or postscript and modify the subject line for each type of event.

Pointman has the ability to store email addresses for nearly every employee, contact or company within the database. EM can use those email addresses if they are available.

Many types of events monitored involve multiple lines of data, for example, shipment lines and order lines. So that a single message can be generated for each main event (example, shipment or order), a delay (in minutes) can be specified. No message is sent for the event until the delay interval has elapsed since the last line was created.

The purge days setting determines how long the records for an event remain in the E-Messaging tables. The larger this setting is made, the larger the tables become, but the more reliable the E-Messaging system can be for not sending messages for old events. Changing this interval can sometimes cause duplicate messages to be sent. If possible, leave it at the original setting of 365 days.

Most events are available in 2 versions: plain text and HTML. The HTML version includes “tags” that format the message. The preamble for an HTML formatted message must begin with the tag <HTML>. Good HTML form requires that the Preamble also include the <BODY> tag, therefore, the Preamble should begin with “<HTML><BODY>” (ignore the quotes). Good form also requires that the Postscript setting end with the tags “</BODY></HTML>” (note the reversed order).

The HTML form also allows graphics to be added through the Preamble or Postscript. This requires that the graphic file exist (.gif or .jpg format is recommended) and be accessible through a web page. For example: The Viewpoint Solutions logo is available on the Pivotpoint Southwest web page. Adding the following line to the Preamble after the <BODY> tag will cause it to be displayed when the message is read.

```
<HTML><BODY>  
<A src="http://www.pivotpointsw.com/images/VPLogo4_202x83.gif">Viewpoint</A>
```

In each case, the installation script loads the information needed to monitor the event into the EMessaging tables. The EMessaging Administrator application is used to configure and activate each event type.

The user has the option of including line level details in the message. A “Details View” must be specified that will gather and organize the data. These views are found in the “DetailViews.sql”

script. Including details are not appropriate for all events and therefore a view doesn't exist for every event. The event details views can also be modified, or new versions created to change the details section content.

Some events also can be controlled by values in the PROPERTIES setting. These take the form:

```
PROPERTYNAME=PROPERTYVALUE;PROPERTYSET=VALUE1,VALUE2,VALUE3
```

Properties should be separated by semicolons. Commas should separate multiple values for a single property.

In general, multiple values for a property may be treated using OR logic and multiple properties are treated using AND logic. Effective, this may be read by replacing commas with the word OR and semi-colons with the word AND. For example:

```
TASK=UPDATE,DELETE;PERSON=FRED,JANE,MIKE
```

In this example, a message is sent only if the TASK is UPDATE **or** DELETE **and** the PERSON involved is FRED **or** JANE **or** MIKE.

Although this is a good rule of thumb, check the instructions for each event to see what properties exist and how they are applied. This can be very dependent on the nature of the event being monitored.

Descriptions follow for events available for monitoring by Viewpoint EMessaging. Those designated "standard" are included in the original purchase with the EM engine. Purchase additional events by contacting Pivotpoint Southwest. Additional events may also be created on a custom basis. Call for a quote.

**Backordered Part – BACKORDER**

Installation script: MsgSvrEventBACKORDER.sql.

Create a message when a part on a sales order line is backordered.

A backorder is defined as an allocation that registers a shortage for an Order Schedule.

The quantity available is defined as the quantity on hand in nettable warehouses less the quantity allocated.

Recipients can include the customer, the creator of the Sales Order and an email address specified by the administrator.

The message body will include the sales order number and line, customer name and number, order date, part number and description, quantity ordered, quantity on hand, quantity allocated and quantity available.

Example

---

Subject: Viewpoint Message - Backorder, insufficient stock

```
Sales Order 1438 line 1
for Customer: HERSHEY PUPPY ENTERPRISES (# 1013)
was backordered 11/08/2001 02:11 AM
due to insufficient quantity available
for Part 1001-001 - TRANSCEIVER, DIGITAL
Ordered: 500      On Hand: 2      Allocated: 0      Available: 2
```

---

**Bill of Materials – BOM, standard**

Installation script: MsgSvrEventBOM.sql

Sends a message if a bill of materials is created. A change at the top level will also cause a message.

The administrator must specify the recipient during configuration.

The message body will include the part number, part description, creation or change date and the effective date.

**Example**

---

Subject: Viewpoint Message - New or Modified Bill of Materials

Bill of Materials created or modified for part number TMR555  
PROGRAMMABLE TIMER  
Created on Nov 17, 2001  
Effective Date Nov 17, 2001

---

**Customer Placed on Credit Hold – CUSTHOLD**

Installation script: MsgSvrEventCUSTHOLD.sql.

Send a message when a customer is placed on credit hold.

The recipient must be an email address specified by the administrator.

The message body will include customer name and number, business segment, permanent or temporary hold, person making the change and date of the change.

To include details:

- **VWPT\_V\_CUSTHOLD\_DETAILS (VWPT\_V\_CUSTHOLD\_DETAILS\_HTML)** - Adds a list of Open Sales Orders and their value for the Customer.
- **VWPT\_V\_CUSTHOLD\_SEG\_DETAILS (VWPT\_V\_CUSTHOLD\_SEG\_DETAILS\_HTM)** - Adds a list of Open Sales Orders and their value for the Customer subtotaled by business segment.

**Example**

---

Subject: Viewpoint Message - Customer Placed on Credit Hold

ABC AUTO CENTER

Customer no. ABCA01 placed on Temporary Credit Hold  
in Business Segment CHICAGO  
on 06/25/2002  
by John Smith.

| Sales Order | Status | Amount |
|-------------|--------|--------|
| 12106       | OPEN   | 150.00 |
| 12200       | OPEN   | 450.00 |
| Total       |        | 600.00 |

---

**Kanban Replenishment – KANBAN**

Installation script: MsgSvrEventKANBAN.sql.

Three synchronized events that track parts in a warehouse and bin location notifying the email addresses specified when parts require replenishing or if an attempted replenishing is insufficient.

Each instance can be configured for a different warehouse and bin location.

The recipient must be an email address specified by the administrator. Different addresses can be specified for low quantity and insufficient replenishment messages.

The message body will include part number, warehouse, bin, business segment, current quantity, minimum required quantity, shortage, date of last inventory change and person responsible.

**Example 1**

---

Subject: Viewpoint Message – Kanban Event

Part Number 532176-004 requires replenishment.

Minimum Quantity: 2000  
Current Quantity: 1985  
Short Quantity: 15

Date: 01/22/2003 04:25 PM

Warehouse: REEL  
Bin Location: REEL  
Business Segment: CHICAGO  
KANBAN/EMAIL

---

**Example 2**

---

Subject: Viewpoint Message – Kanban Event

Replenishment for Part Number 124396-91A was insufficient.

Minimum Quantity: 1500  
Current Quantity: 1169  
Short Quantity: 331

Date: 01/22/2003 02:04 PM

Warehouse: REEL  
Bin Location: REEL  
Business Segment: CHICAGO  
KANBANLO/EMAIL

---

**Setup and additional information:**

The KanBan event system monitors specified parts in a specified warehouse location and sends a message if the quantity at that location drops below a specified minimum.

A numeric extended attribute called KANBANQTY must exist for Parts at a Segment. Spelling for the extended attribute code must be exact, no spaces, all uppercase. All parts to be monitored must have a value for this extended attribute. Parts without this extended value will be IGNORED.

This event system consists of 3 event types that work together: KANBAN, KANBANOK, KANBANLO. The one installation script installs all 3 KanBan events. All 3 events must be have identical values in the PROPERTIES column of the Configuration tab, should have the same start time and must be active.

Event KANBAN sends a replenishment message for each specified Warehouse-Bin-Part combination that drops below the KANBANQTY value. Event KANBANLO sends a message if an attempt to replenish leaves the quantity below the KANBANQTY value. A default delay of 120 minutes is set (user changeable) to allow additional inventory moves before testing for a low quantity. Event KANBANOK does not send messages, but is required to avoid sending redundant messages from the other 2 events.

The Properties column in the Configuration tab must contain the Warehouse, Bin Location and Business Segment to be monitored. The order doesn't matter, but the syntax is very specific:

- Separate the 3 settings by semicolons.
- No spaces around the equal (=) signs.
- Spelling and case must exactly match the values in the database.

Example: WH=KANBAN; BIN=MAIN; SEG=MFGPLANT

The delay time for KANBANLO can be adjusted in the Start Dates tab.

Do NOT add a delay for KANBAN or KANBANOK.

**Material Received – REC, standard**

Installation script: MsgSvrEventREC.sql

Send a message when material is received (a receiver is created). A range can be specified so that messages are sent only if the total dollar amount of the receiver is within the range. This event can generate many messages if not qualified by a total amount.

The recipient can be the receiver creator, purchase order buyer, requisitioner, vendor, contact (on the PO) or an email address specified by the administrator.

The message body will include the purchase order number, creator of the receiver, date and time received, vendor number and name, total dollar value received, scheduled due date and purchase order status.

**Example**

---

Subject: Viewpoint Message - New Material Receipt

```
Receiver Number 1270 was created or updated
By: Smith, John
Date: Jan 28, 2002 12:38 AM
For Purchase Order Number 1263 line: 1
  Part: 010903-01 - CHROME CABINET - COLE
  Quantity: 3
From Vendor: STAPLES, INC. (# 1013)
Total Value Received: $ 600
```

---

**Pointman Orbiter Failure – ORB, standard**

Installation script: MsgSvrEventORB.sql.

Send a message when an orbiter task is assigned a status of RUN FAIL.

The recipient can be the orbiter job requestor or an email address specified by the administrator.

The message body will include the orbiter request process id, the requestor's name, the request type code and description, the date and time of submission and the ending date and time of the process.

**Example**

---

Subject: Viewpoint Message - Failed Orbiter Task

Orbiter Request 28069 ended with a status of Run Fail.  
Requested by: John Smith  
Request Type: PRNPICKLIST - Print Pick Lists  
Requested: Jan 25, 2002 11:33 PM

Printer: \\flwh1\h Copies: 1

---

**Purchase Order Creation – PO, standard**

Installation script: MsgSvrEventPO.sql.

Send a message when a purchase order (PO) is created or modified. A range can be specified so that messages are sent only if the total dollar amount of the order is within the range. In order to include the total dollar amount, EM attempts to wait until all PO lines have been entered. After a PO is created, EM delays a specified time (check the event configuration for the value) after each line is created, to determine if additional lines are being added. After the delay time expires, (no new lines have been created for the specified number of minutes) EM sends the message(s).

The recipient can be the buyer, contact person, requisitioner or an email address specified by the administrator.

The message body will include the purchase order number, creator, creation date, vendor number and name, total dollar amount, scheduled due date and order status.

To include details:

- VWPT\_V\_PO\_DETAILS (VWPT\_V\_PO\_DETAILS\_HTML) -Adds a list of the Purchase Order Lines, Part number, Description and Quantity.

**Example**

Viewpoint Message - New Purchase Order

Purchase Order # 1261 was created or updated  
By: Smith, John

Date: 01/27/2002 09:24 PM  
For Vendor: PLASTIC PELLETS, INC. (# 1006)

| Line | Part#/Item#/Operation#                   | Quantity |
|------|--|----------|
| Item | Description                              |          |
| 1    | 010913-01<br>ASSY, CHROME CABINET, COLE  | 4        |
| 2    | 010913-02<br>ASSY. CHROME CABINET - COLE | 9        |

Total Order Amount: \$ 4280

Scheduled Due Date: 01/29/2002  
Status: OPEN

**Purchase Order Material Receipt – POREC, standard**

Installation script: MsgSvrEventPOREC.sql.

Send a message when material is received against a purchase order (PO). A range can be specified so that messages are sent only if the total dollar amount received for a single purchase order is within the range. In order to include the total dollar amount, EM attempts to wait until all receivers have been entered. After a receiver for a PO is created, EM delays a specified time (the default is 30 minutes) after each receiver is created, to determine if additional receivers are being added for that PO. After the delay time expires, (no new lines have been created for 30 minutes) EM sends the message(s).

The recipient can be the buyer, requisitioner, vendor, contact (on the PO) or an email address specified by the administrator.

The message body will include the purchase order number, creator of the receiver, date and time received, vendor number and name, total dollar value received, scheduled due date and purchase order status.

To include details:

- VWPT\_V\_POREC\_DETAILS (VWPT\_V\_POREC\_DETAILS\_HTML) -Adds a list of the Purchase Order Lines, Part number, Description and Quantity.

**Example**

Subject: Viewpoint Message - New Purchase Order Receipts

Material Received for Purchase Order Number 21286LR  
 By: Smith, John  
 Date: 06/30/2002 07:34 PM

From Vendor: ETRONCO (# ETRON02)  
 Total Value Received: (USD) 127  
 Scheduled Due Date: 10/18/2001  
 Order Status: CLOSED

Business Segment: CHICAGO

| Line | Quantity | Part, Item, Op No.       | Receiver | Quantity |
|------|----------|--------------------------|----------|----------|
| Sch. | Ordered  | Description              | No.      | Received |
| 1    | 50       | 1060-7190                | 851      | 50       |
| 1    |          | BOLT-BANJO 12mm          |          |          |
| 2    | 50       | 1060-7191                | 852      | 50       |
| 1    |          | WASHER-BANJO 12mm COPPER |          |          |
| 3    | 50       | 1060-7902                | 853      | 50       |
| 1    |          | NUT-CAP BANJO 12MM       |          |          |
| 4    | 50       | 1060-7720                | 854      | 50       |
| 1    |          | BOLT-BANJO 10mm          |          |          |
| 5    | 50       | 1060-7721                | 855      | 50       |
| 1    |          | WASHER BANJO 10mm        |          |          |

**Sales Order Creation – SO, standard**

Installation script: MsgSvrEventSO.sql

Send a message when a sales order (SO) is created or modified. A range can be specified so that messages are sent only if the total dollar amount of the order is within the range. In order to include the total dollar amount, EM attempts to wait until all SO lines have been entered. After an SO is created, EM delays a specified time (the default is 10 minutes) after each line is created, to determine if additional lines are being added. After the delay time expires, (no new lines have been created for 10 minutes) EM sends the message(s).

The recipient can be the primary sales person, primary support person, customer or an email address specified by the administrator.

The message body will include the sales order number, creator, creation date, customer number and name, total dollar amount, scheduled due date and order status.

To include details:

- VWPT\_V\_SO\_DETAILS (VWPT\_V\_SO\_DETAILS\_HTML) -Adds a list of the Sales Order Line-Schedules, Part number, Description and Quantity and Due Date.

**Example**

Subject: Viewpoint Message - New Sales Order

Sales Order Number 3371 was created or updated  
 By: Smith, John  
 On: 06/24/2002 09:42 PM  
 For Customer: SNIPOFF CORPORATION (# SNPOFF)  
 Total Sales Order Amount: (USD) 19162  
 Scheduled Due Date: 06/25/2002  
 Status: OPEN

Business Segment: CHICAGO

| Line | Part Number                        | Quantity | Due Date   |
|------|------------------------------------|----------|------------|
| Seq  | Description                        |          |            |
| 1    | 150-4024                           | 1        | 06/25/2002 |
|      | 1 SYSTEM RRN 214 WITH OCC PANEL 25 |          |            |
| 2    | 150-3110                           | 1        | 06/25/2002 |
|      | 1 TRANSTACH II                     |          |            |
| 2    | 150-7110                           | 1        | 07/25/2002 |
|      | 2 TRANSTACH III                    |          |            |
| 2    | 150-9110                           | 1        | 08/25/2002 |
|      | 3 TRANSTACH IV                     |          |            |

**Sales Order Placed on Hold – SOHOLD**

Installation script: MsgSvrEventSOHOLD.sql

Send a message when a sales order (SO) is given a status of HOLD. A range can be specified so that messages are sent only if the total dollar amount of the order is within the range. In order to include the total dollar amount if the sales order happens to be new, EM attempts to wait until all SO lines have been entered. After an SO is created, EM delays a specified time (the default is 10 minutes) after each line is created, to determine if additional lines are being added. After the delay time expires, (no new lines have been created for 10 minutes) EM sends the message(s).

The recipient can be the primary sales person, primary support person, customer or an email address specified by the administrator.

The message body will include the sales order number, creator, creation date, customer number and name, total dollar amount, scheduled due date and order status.

To include details:

- VWPT\_V\_SO\_DETAILS (VWPT\_V\_SO\_DETAILS\_HTML) -Adds a list of the Sales Order Line-Schedules, Part number, Description and Quantity and Due Date.

**Example**

Subject: Viewpoint Message - Sales Order placed on Hold

Sales Order Number 2579 (or a line) was placed on HOLD by Smith, John on 06/26/2002 11:41 AM.

For Customer Number: GNG001           GAS-N-GO

Total Sales Order Amount: (USD) 2895

Scheduled Due Date: 12/14/2001.

Sales Order Status is HOLD

Business Segment: CHICAGO

| Line No | Part Number<br>Description                 | Quantity |
|---------|--|----------|
| 1       | 150-70400D<br>SYSTEM RNJ 875 W/DRAWERS     | 1        |
| 2       | 140-30020<br>DETERGENT-GAS KQ5 (12-8oz),MV | 1        |

**Shipment – SHIPMT, standard**

Installation script: MsgSvrEventSHIPMT.sql.

Sends a message when a shipment is created. Shipment notification is not sent until the status is no longer STAGED. A range can be specified so that messages are sent only if the total dollar amount of the order is within the range. In order to include the total dollar amount, EM attempts to wait until all shipment lines have been entered. After a shipment is created, EM delays a specified time (the default is 90 minutes) after each line is created, to determine if additional lines are being added. After the delay time expires, (no new lines have been created for 90 minutes) EM sends the message(s).

The recipient can be a customer, primary sales person (Rep) for the customer or an email address specified by the administrator.

The message body will include the shipment number, shipment date, customer name and number, person creating the shipment and the total shipment dollar amount.

To include details:

- VWPT\_V\_SHIPMT\_DETAILS (VWPT\_V\_SHIPMT\_DETAILS\_HTML) -Adds a list of the Sales Order Line-Schedules, Part number, Description and Quantity and Due Date.

**Example**

Subject: Viewpoint Message - New Shipment

Shipment: 24211  
 From: ABC MANUF. CHICAGO  
 Date Shipped: 06/28/2002  
 Carrier: UNITED PARCEL SERVICE

To:  
 FRANKS'S AUTO (#PHIL05)  
 143 W Main St.  
 CENTERVILLE, TN 54314

Sales Rep: JOHN SMITH  
 Original Sales Order: 1201  
 Sales Order Total: (USD) 1427.95

Shipment Total: (USD) 997.95

Shipment created by Installation Installation.

| Line Part#       |  | Quantity |
|------------------|--|----------|
| Item Description |  |          |
| 1                | 120-7865<br>KIT-RETROFIT CP W/OCC XQFS90 | 1        |

**Shipment with Tracking Information – SHIPTRACK, standard**

Installation script: MsgSvrEventSHIPTRACK.sql.

Sends a message when a shipment is created (similar to the SHIPMT event). If the carrier code is contained in the view vwpt\_vem\_shptrk\_cc (or vwpt\_vem\_shptrk\_cc\_html for HTML messages), it will include a link to the web page of the carrier that will allow the recipient to check the status.

A range can be specified so that messages are sent only if the total dollar amount of the order is within the range. In order to include the total dollar amount, EM attempts to wait until all shipment lines have been entered. After a shipment is created, EM delays a specified time (check the configuration for the default) after each line is created, to determine if additional lines are being added. After the delay time expires, (no new lines have been created for the specified number of minutes) EM sends the message(s).

The recipient can be a customer, primary sales person for the customer or an email address specified by the administrator.

The message body will include the shipment number, shipment date, customer name and number, person creating the shipment and the total shipment dollar amount. It also includes the World Wide Web link to the Federal Express tracking system and assumes that the tracking number has been entered in the dock number field in Pointman.

To include details:

- VWPT\_V\_SHIPMT\_DETAILS (VWPT\_V\_SHIPMT\_DETAILS\_HTML) -Adds a list of the Sales Order Line-Schedules, Part number, Description and Quantity and Due Date.

Properties include:

- TRACKING: If TRACKING=Y then only shipments by carriers in the list will be messaged. If TRACKING=N then only shipments by carriers in the list will NOT be messaged.
- CARRIER: Specify a list using the 3-letter CARRIER\_CODE from the view and message will be sent to those carriers specifically. This is effectively a subset of TRACKING=Y.

Properties examples:

- TRACKING=Y Messages sent only for carriers listed.
- TRACKING=N Messages sent only to carriers not listed.
- CARRIER=FDX, FED, UPS Messages sent for Federal Express and UPS carried shipments.

**Example**

Subject: Viewpoint Message - New Shipment by Federal Express

Shipment 14506 was sent Mar 28, 2002  
To: WAL-MART (1010)

Carrier: Federal Express Standard Overnight  
Package tracking number: 1234567890XXX  
Check the shipment status by clicking on the following:  
<http://fedex.com/cgi-bin/tracking?action?1234567890XXX>

From: ABC TECHNOLOGIES - CHICAGO PLANT  
Sales Rep: John Smith

| Line  | Part#               | Quantity |
|-------|---------------------|----------|
| Item  | Description         |          |
| ----- | -----               | -----    |
| 1     | 010903-02           | 1        |
|       | CHROME CABINET COLE |          |

Total shipment amount: \$543.00

**Shipment by Federal Express – FEDEX, standard**

Installation script: MsgSvrEventFEDEX.sql.

Sends a message when a shipment with a carrier code beginning with FDX or FED is created. A range can be specified so that messages are sent only if the total dollar amount of the order is within the range. In order to include the total dollar amount, EM attempts to wait until all shipment lines have been entered. After a shipment is created, EM delays a specified time (check the configuration for the default) after each line is created, to determine if additional lines are being added. After the delay time expires, (no new lines have been created for the specified number of minutes) EM sends the message(s).

The recipient can be a customer, primary sales person for the customer or an email address specified by the administrator.

The message body will include the shipment number, shipment date, customer name and number, person creating the shipment and the total shipment dollar amount. It also includes the World Wide Web link to the Federal Express tracking system and assumes that the tracking number has been entered in the dock number field in Pointman.

To include details:

- VWPT\_V\_SHIPMT\_DETAILS (VWPT\_V\_SHIPMT\_DETAILS\_HTML) -Adds a list of the Sales Order Line-Schedules, Part number, Description and Quantity and Due Date.

**Example**

Subject: Viewpoint Message - New Shipment by Federal Express

Shipment 14506 was sent Mar 28, 2002

To: WAL-MART (1010)

Carrier: Federal Express Standard Overnight

Package tracking number: 1234567890XXX

Check the shipment status by clicking on the following:

<http://fedex.com/cgi-bin/tracking?action?1234567890XXX>

From: ABC TECHNOLOGIES - CHICAGO PLANT

Sales Rep: John Smith

| Line | Part#                            | Quantity |
|------|----------------------------------|----------|
| Item | Description                      |          |
| 1    | 010903-02<br>CHROME CABINET COLE | 1        |

Total shipment amount: \$543.00

**Shipment by UPS – UPS**

Installation script: MsgSvrEventUPS.sql.

Sends a message when a shipment with a carrier code beginning with UPS is created. A range can be specified so that messages are sent only if the total dollar amount of the order is within the range. In order to include the total dollar amount, EM attempts to wait until all shipment lines have been entered. After a shipment is created, EM delays a specified time (the default is 90 minutes) after each line is created, to determine if additional lines are being added. After the delay time expires, (no new lines have been created for 90 minutes) EM sends the message(s).

The recipient can be a customer, primary sales person for the customer or an email address specified by the administrator.

The message body will include the shipment number, shipment date, customer name and number, person creating the shipment and the total shipment dollar amount. It also includes the World Wide Web link to the UPS tracking system and assumes that the tracking number has been entered in the dock number field in Pointman.

To include details:

- VWPT\_V\_SHIPMT\_DETAILS (VWPT\_V\_SHIPMT\_DETAILS\_HTML) -Adds a list of the Sales Order Line-Schedules, Part number, Description and Quantity and Due Date.

**Example**

Subject: Viewpoint Message - New Shipment by UPS

Shipment 14510 was sent Mar 28, 2002  
To: WAL-MART (1010)

Carrier: UPS Blue Label  
Package tracking number: B0987654321A  
Check the shipment status by clicking on the following:

[http://wwwapps.ups.com/etracking/tracking.cgi?tracknums\\_displayed=1&TypeOfInquiryNumber=T&HTMLVersion=4.0&InquiryNumber1=B0987654321A](http://wwwapps.ups.com/etracking/tracking.cgi?tracknums_displayed=1&TypeOfInquiryNumber=T&HTMLVersion=4.0&InquiryNumber1=B0987654321A)

From: ABC TECHNOLOGIES - CHICAGO PLANT  
Sales Rep: John Smith

| Line | Part#                            | Quantity |
|------|----------------------------------|----------|
| Item | Description                      |          |
| 1    | 010903-02<br>CHROME CABINET COLE | 1        |

Total shipment amount: \$2,222.00

**Task Queue – TASK, standard**

Installation script: MsgSvrEventTASK.sql.

Sends a message if an entry is made in the task queue (Point.Man table USER\_DIARY). This also includes re-assigning a task to another person.

The administrator can select the task owner, the source of a re-assigned task, the destination of a re-assigned task and specify an email address as the recipients.

The message body will include the person assigned the task, the source and destination of a re-assigned task, the task creator, the event description from Pointman, a customer or vendor name if one exists, the priority, and the due date.

The event recognizes 2 properties.

- **TASK** - restricts messages to the list of tasks specified. Specify a task by select enough of the event description to be unique. Separate multiple tasks with commas.
- **PERSON** – restricts messages to the list of Employee numbers specified. Separate employee numbers by commas.

Properties Example:

```
TASK=FULLY ALLOCATE;PERSON=DOE123, SMITH3
```

In this example, messages would only be sent for events with descriptions containing the words “FULLY ALLOCATE” and if the task owner or destination are employees with the employee number DOE123 or SMITH3.

**Example**

---

Subject: Viewpoint Message - New Task in User Diary

Pointman Task Created or Reassigned

Task Owner: Jane Doe

Task Source: John Smith

TESTFAIL

Failed Final Test

Priority: 3

Private: Y

Task Received: Jan 25, 2002

Task Due: Jan 25, 2002

---

**Voucher Creation – VCHR, standard**

Installation script: MsgSvrEventVCHRsql.

Send a message when a voucher is created or modified. A range can be specified so that messages are sent only if the total dollar amount of the voucher is within the range.

The recipient must be an email address specified by the administrator.

The message body will include the voucher number, creator, creation date, vendor number and name, voucher amount and due date net.

To include details:

- VWPT\_V\_SHIPMT\_DETAILS (VWPT\_V\_SHIPMT\_DETAILS\_HTML) -Adds a list of the Sales Order Line-Schedules, Part number, Description and Quantity and Due Date.

Example

Subject: Viewpoint Message - New Voucher Created

Voucher Number: 1483 was created or updated

By: Smith, John

On: 06/29/2002 02:25 AM

For Vendor: MODERN INTEGRATION, INC. (# MODI03)

Total Voucher Amount: (USD) 4125.00

Due Date Net: 10/06/2001

Invoice Date: 09/06/2001

Payment Terms: NET30

Voucher Type: VCH

Voucher Status: CLOSED

Hold Status: NO HOLD

Vendor Invoice: 01483

Business Segment: MTI PLANT

| Line No. | Type       | Part,Item,Operation<br>Description | Quantity<br>Vouchered | Amount<br>Vouchered |
|----------|------------|------------------------------------|-----------------------|---------------------|
| 1        | RECEIPT    | 550-17859<br>ARCHOTACH IV          | 2                     | 4000.00             |
| 2        | MISC PURCH |                                    |                       | 125.00              |

**Notes**