CStoreOffice®

Alerts Manual

For Petrosoft Users

Version 1.1

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Petrosoft

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ABOUT ALERTS

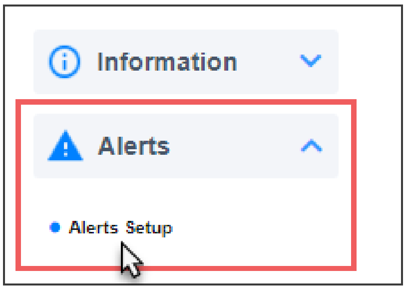
Using Alerts in CStoreOffice®, you can get regular automatic updates from the system on your business-critical data what gives you the following advantages:

- Alerts work automatically, which means that you don't need to keep in mind the need for regular data check.
- There are various groups of alerts from different business areas in CStoreOffice®, so you can get as much complete data as you need.
- You can respond effectively to any data updates, by setting up and updating, if needed, you alerts any time you need.

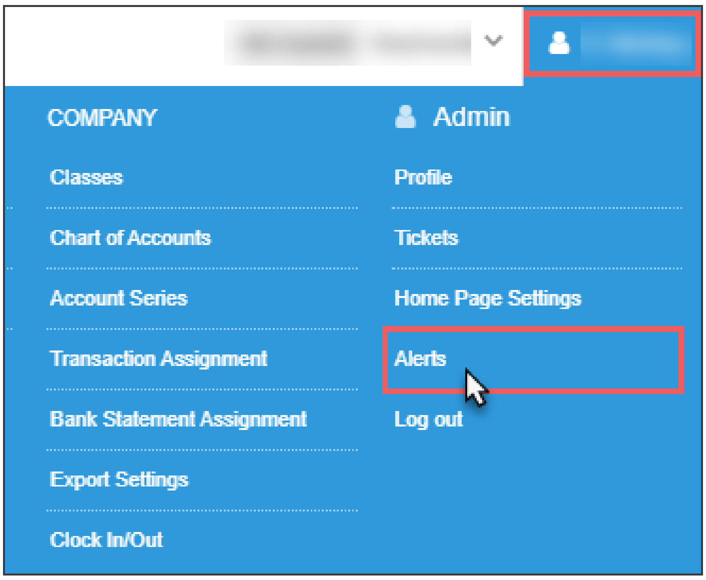
How to Access Alerts

To access alerts in CStoreOffice®, from the CStoreOffice® home page, do one of the following:

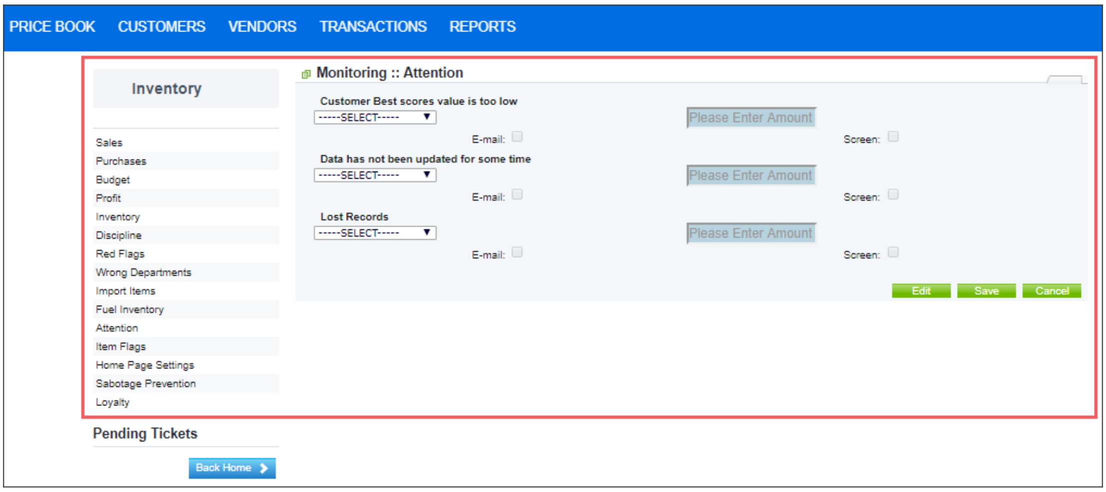
- At the bottom of the left column, click **Alerts** > **Alerts Setup**.



- At the top right of the home page, click your user name > **Admin** > **Alerts**.



Result: The alerts setup page opens.



For more information on about the alerts groups and how to work with alerts, go to the following sections:

WORKING WITH ALERTS

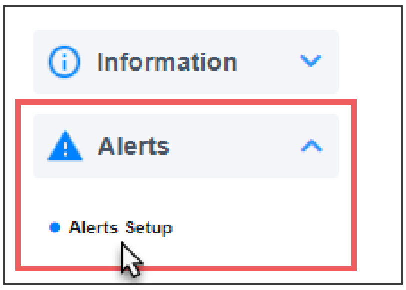
You can perform the following operations with the alerts in CStoreOffice®:

- Set up or activate the alert
- Update the alert parameters
- Deactivate the alert

Setting Up or Activating Alert

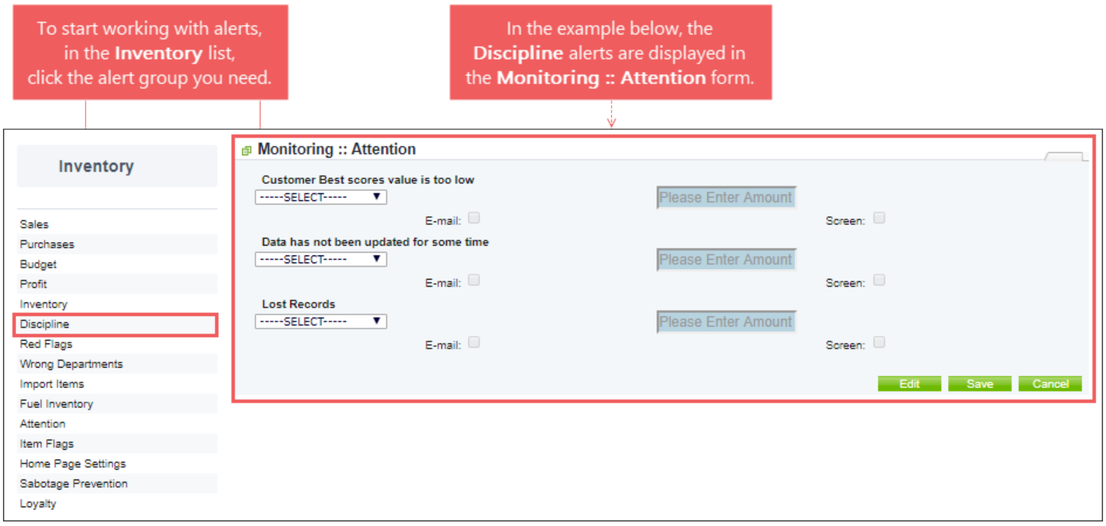
To set up the alert or activate it in CStoreOffice®, follow the steps:

1. From the CStoreOffice® home page, go to the left column.
2. At the bottom of the left column, click **Alerts** > **Alerts Setup**.

   Result: The alerts setup page opens.
3. In the **Inventory** section, click the group of alerts you want to set up. For details, see Alerts Groups.

Result: The Monitoring :: Attention form displays the available alerts in the selected alert group.



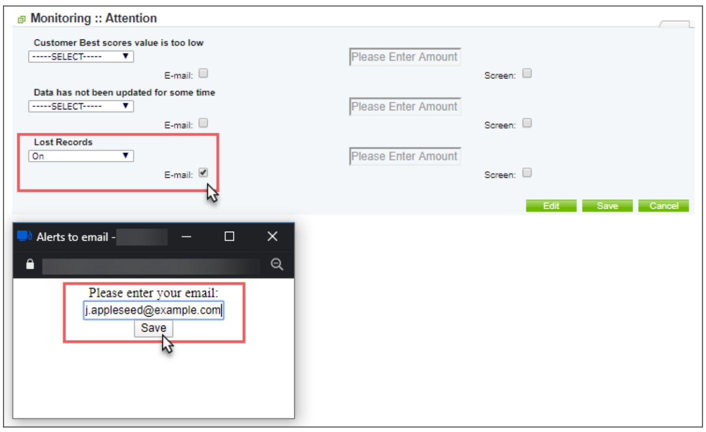
4. In the **Monitoring :: Attention** form, choose what alert you want to set up and then do the following:
   a. At the bottom of the form, click **Edit**.
   b. Below the alert title, select the alert option from the list.
   c. (Optional) On the right of the selected alert option, type the threshold or the permissible difference for the alert values, if needed.

   > For more information about setting up the threshold or permissible difference values for different types of alerts, see Alerts Groups.

   d. Select one or both of the following delivery options:

      - **E-mail**: Select this option, if you want to receive the alerts by e-mail.

        > After selecting the **E-mail** option, in the **Alerts** to email window, you will need to type your email address to receive alerts and then click **Save**.



- **Screen**: Select this option, if you want to view alerts directly working with CStoreOffice® in a pop-up window.

e. At the bottom of the form, click **Save**.
Result: The alert is activated. You will receive this alert the next day or next shift.

Updating Alert Parameters

You can update the following parameters of your active alert:

- Select another alert value from the list of available values
- Select another or add one more delivery option
- Change the threshold or permissible difference, if any, for the selected alert

To update the alert parameters in CStoreOffice®, open this alert, apply the changes you need and then at the bottom of the **Monitoring :: Attention** form, click **Save**.

> For more information on how to open the alert, see steps 1-3 in the Setting Up or Activating Alert procedure.

Result: The alert is updated. The changes will be applied the next day or next shift.

Deactivating Alert

To delete or deactivate your active alert in CStoreOffice®, follow the steps:

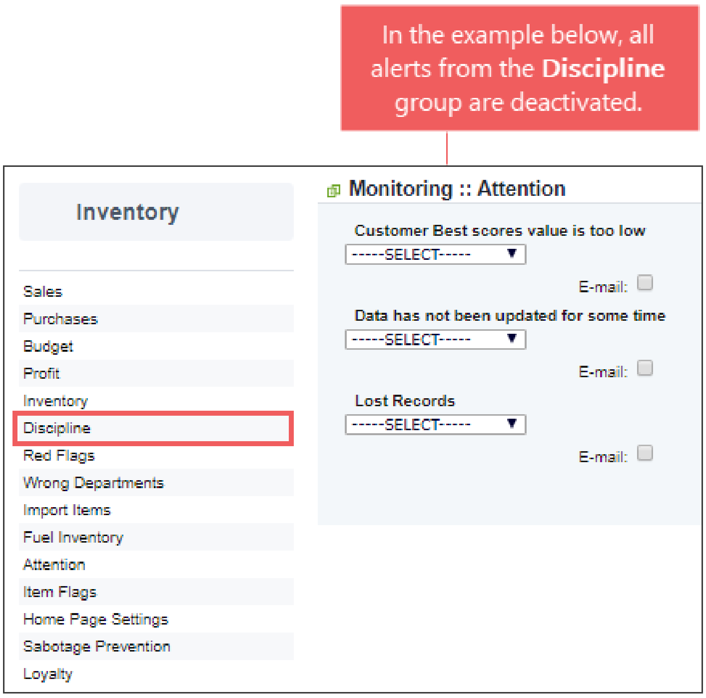
1. Open the active alert you want to delete or deactivate.

   > For more information on how to open the alert, see steps 1-3 in the Setting Up or Activating Alert procedure.

2. At the bottom of the **Monitoring :: Attention** form, click **Edit**.
3. Go to the active alerts and then below each alert name select **-----SELECT-----**.

4. At the bottom of the **Monitoring :: Attention** form, click **Save**.

   Result: The alert is deactivated.



ALERTS GROUPS

This section consists of the following subsections:

- List of Alerts Groups
- How to Access Specific Alert Group

List of Alerts Groups

You can configure the following groups of alerts in CStoreOffice®:

- Discipline
- Wrong Departments
- Loyalty

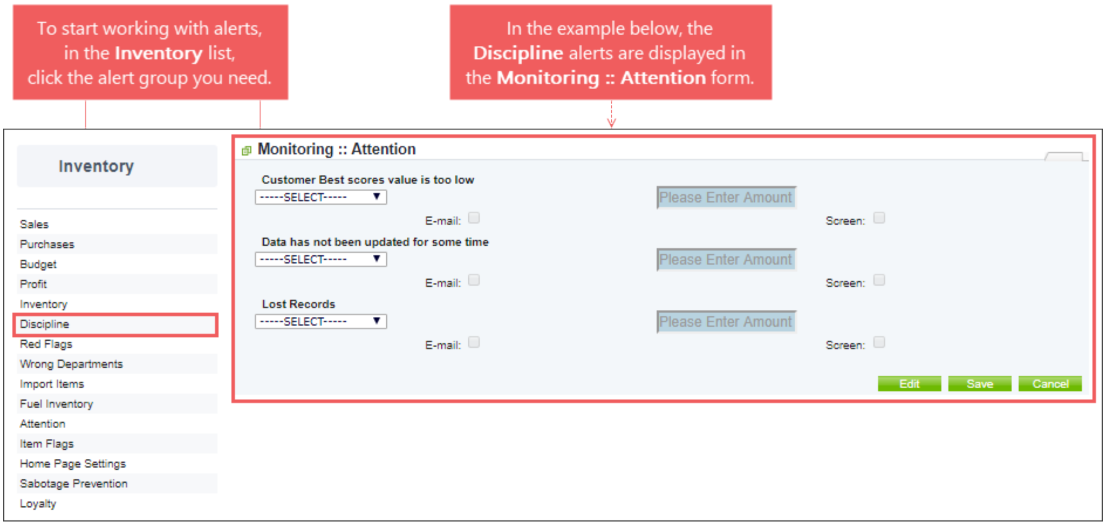
To view more information about the alert type you need, click this alert type name in the list above.

In each section describing the specific alert group, you can find the details on how to work with certain alert type. To view general steps of working with alerts in CStoreOffice®, common for all alerts, go to Working with Alerts.

How to Access Specific Alert Group

To access the alert group you need in CStoreOffice®, in the **Inventory** list, click this group name.

Result: The alerts of the selected group are displayed in the Monitoring :: Attention form.



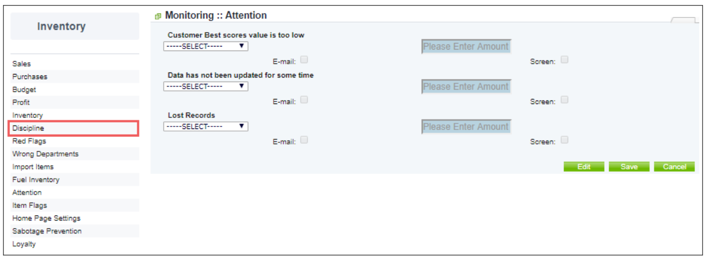
Discipline Alerts

Using alerts from the Discipline group, you can monitor if your employees enter store data in the system correctly and in a timely manner or not.

To access the Discipline alerts in CStoreOffice®:

1. From the CStoreOffice® home page, do one of the following:
   - At the bottom of the left column, click **Alerts** > **Alerts Setup**.
   - At the top right of the home page, click your user name > **Admin** > **Alerts**.

     Result: The alerts setup page opens.
2. In the **Inventory** list, click **Discipline**.



The Discipline alerts monitor the following missing data:

- **Store Sales**
- **Fuel Sales**
- **Cash Register**
- **Fuel Inventory**

The Discipline group includes the following alerts:

- **Customer Best scores value is too low**: This alert is deprecated. It is planned to be removed during next releases.
- **Data has not been updated for some time**: This alert is sent when the data has not been updated within the last few days. For details, see Activating the Data has not been updated for some time Alert.
- **Lost Records**: This alert is sent when the data has not been updated in some days withing current month. For details, see Activating the Lost Records Alert.

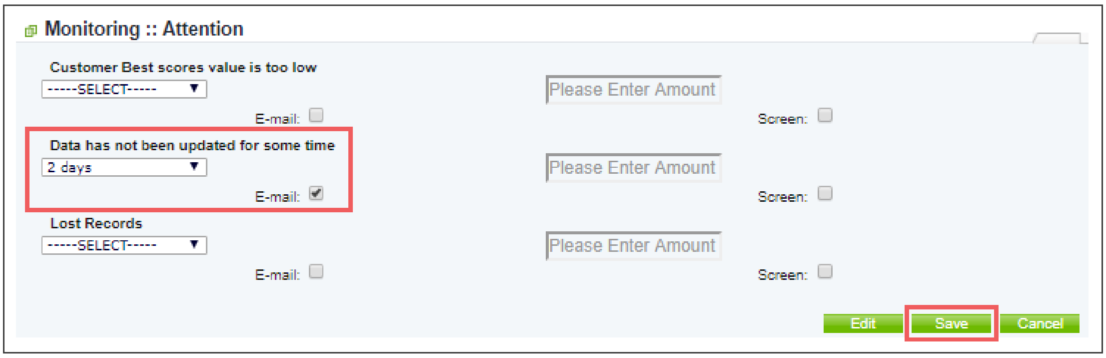
Activating the Data has not been updated for some time Alert

To activate the **Data has not been updated for some time** alert:

1. At the bottom right of the **Monitoring :: Attention** form, click **Edit**.
2. Below the alert name, select the number of days for monitoring missing data:
   - **1 day**: The alert is sent if there is no data found on the date, which is equal to one day before yesterday.
   - **2 days**: The alert is sent if there is no data found on the date, which is equal to two days before yesterday.
   - **3 days**: The alert is sent if there is no data found on the date, which is equal to three days before yesterday.

> The following missing data is monitored: Fuel Sales, Store Sales, Cash Register, and Fuel Inventory. In case of missing data, the alert contains the link to the corresponding report. For more information on relevant reports and forms, see Fuel Sales, Store Sales, Cash Register Journal Report, Fuel Inventory.

3. Select the delivery option. For details, see Working with Alerts.
4. At the bottom right of the **Monitoring :: Attention** form, click **Save**.



Activating the Lost Records Alert

To activate the **Lost Records** alert:

1. At the bottom right of the **Monitoring :: Attention** form, click **Edit**.
2. Below the alert name, select **On**. The following data is monitored for the period starting from the beginning of the current month till yesterday: Fuel Sales, Store Sales, Cash Register, and Fuel Inventory. In case of missing data, the alert is sent with the link to the corresponding report for the days with missing data.

> For more information on relevant reports and forms, see Fuel Sales, Store Sales, Cash Register Journal Report, Fuel Inventory.

3. Select the delivery option. For details, see Working with Alerts.
4. At the bottom right of the **Monitoring :: Attention** form, click **Save**.

Wrong Departments Alerts

This section consists of the following subsections:

- About Wrong Departments Alerts
- How to Access Wrong Departments Alerts

About Wrong Departments Alerts

Using alerts from the Wrong Departments group, you can monitor the inconsistency between the departments names in CStoreOffice® and cash registers.

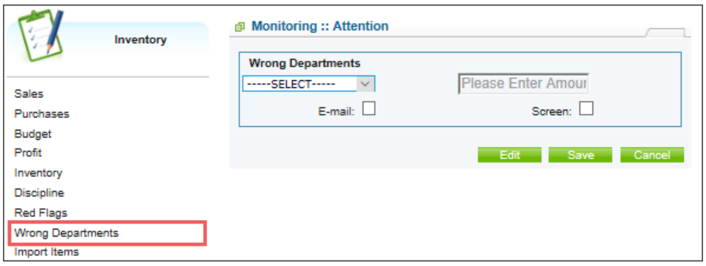
The Wrong Departments group includes only one Wrong Departments alert.

In the **Wrong Departments** list, select **On**, if you want to receive alerts each time the department name coming from the cash register does not match any department name in CStoreOffice®.

How to Access Wrong Departments Alerts

To access the Wrong Departments alerts in CStoreOffice®:

1. From the CStoreOffice® home page, do one of the following:
   - At the bottom of the left column, click **Alerts** > **Alerts Setup**.
   - At the top right of the home page, click your user name > **Admin** > **Alerts**.
     Result: The alerts setup page opens.
2. In the **Inventory** list, click **Wrong Departments**.



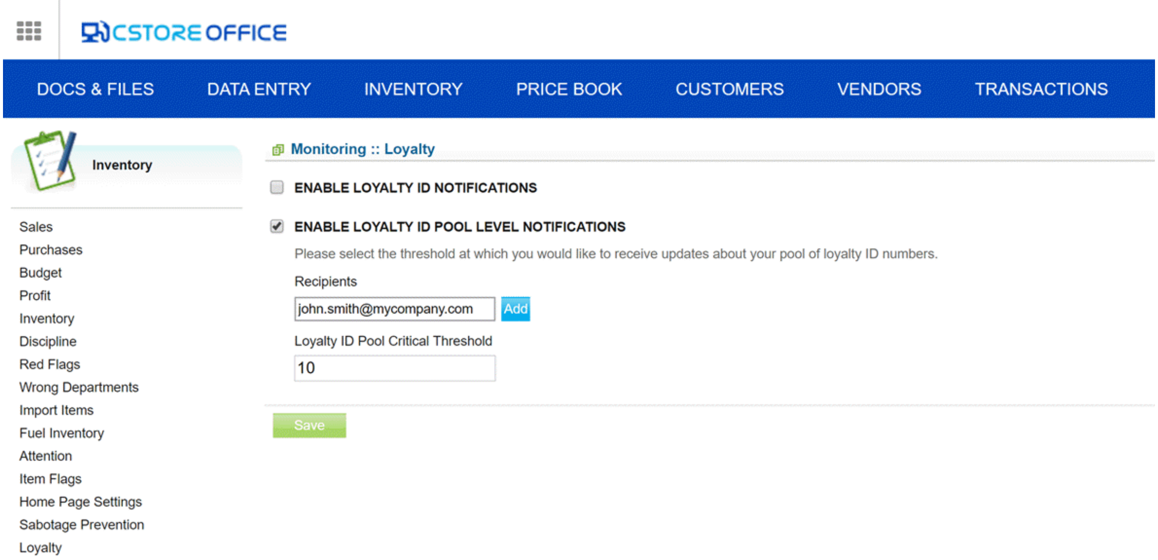
Getting Notifications About Loyalty ID Ranges

If the number of IDs in the range requested for the loyalty program runs below some threshold, Petrosoft, LLC can send you an email notification. In this case, you can request another loyalty ID range for the same loyalty program.

To set the threshold for email notifications, follow the steps:

1. From the CStoreOffice® home page, do one of the following:
   - At the bottom of the left column, click **Alerts** > **Alerts Setup**.
   - At the top right of the home page, click your user name > **Admin** > **Alerts**.
     Result: The alerts setup page opens.

2. In the **Inventory** list on the left, select **Loyalty**.
3. In the **Monitoring :: Loyalty** view, select the **Enable loyalty ID pool level notifications** check box.
4. In the **Recipients** field, enter an email address at which the notification must be sent.
5. In the **Add Loyalty ID Pool Critical Threshold** field, enter the threshold value in percent.



Result: When the number of IDs in the range falls below the set threshold, Petrosoft, LLC will send you a notification at the specified email address.