

Business One in Action - How to Setup Alerts for 'Task' Activities?



Applies to:

SAP Business One, Administration, [Approval and Alerts](#)

Summary:

This article provides a step-by-step solution on how to set up a reminder for an activity with 'Task' as its type.

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Author Bio:

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How to setup Alerts for Task Activities?

Note [870570](#)

When creating an *Activity* in the *Business Partner Master Data* -> *Activity*, SAP Business One allows a user to set a trigger for an alert to remind the assignee of the event. This applies to the activities *Phone Call*, *Meeting*, *Note* or *Other*. Simply place a tick in the checkbox for *Reminder* and define when this reminder should happen.

The screenshot shows the 'Activity' dialog box with the following details:

- Activity:** Phone Call (highlighted in a red box)
- Type:** Phone Call
- Subject:** Meeting
- Assigned To:** Task
- Personal:**
- Number:** 1
- BP Code:** [Empty]
- BP Name:** [Empty]
- Contact Person:** [Empty]
- Telephone No.:** [Empty]
- Remarks:** [Empty]
- Start Time:** 25.05.10 11:01
- End Time:** 25.05.10 11:16
- Duration:** 15 Minutes
- Priority:** Normal
- Meeting Location:** [Empty]
- Reminder:** 15 Minutes (highlighted in a red box)
- Inactive:**
- Closed:**
- Buttons:** Add, Cancel, Follow Up

Note however that a reminder cannot be set when an activity is: *Task*.

The screenshot shows the 'Activity' dialog box with the following details:

- Activity:** Task (highlighted in a red box)
- Type:** General
- Subject:** [Empty]
- Assigned To:** manager
- Personal:**
- Number:** 1
- BP Code:** [Empty]
- BP Name:** [Empty]
- Contact Person:** [Empty]
- Telephone No.:** [Empty]
- Remarks:** [Empty]
- Start Date:** 25.05.10
- Due Date:** 25.05.10
- Priority:** Normal
- Meeting Location:** [Empty]
- Status:** Not Started
- Inactive:**
- Closed:**
- Buttons:** Add, Cancel, Follow Up

When an alert is needed for an *Activity* that is a *Task*, the following workaround can be used to achieve this.

1. Create two *User-Defined Fields (UDF)* as follows:

U_Hour

Type :Date/Time

Structure: Hour

This field will hold the time of the appointment.

U_Reminder

Type: Date/Time

Structure :Hour

This will be used to indicate the length of time prior to the meeting when the reminder must be sent for this *Task Activity*.

Field Data

Title: Description:

Type:

Structure:

Set Valid Values for Field

Set Default Value for Field

Mandatory Field

OK Cancel

Field Data

Title: Description:

Type:

Structure:

Set Valid Values for Field

Set Default Value for Field

Mandatory Field

OK Cancel

User-Defined Fields - Management

Category	Title	Description	Type	Dflt	Mand.	Index	Linked Table
▼ Master Data					<input type="checkbox"/>	<input type="checkbox"/>	
▼ Activities					<input type="checkbox"/>	<input type="checkbox"/>	
	Hour	Hour	Hour		<input type="checkbox"/>	<input type="checkbox"/>	
	Reminder	Reminder	Hour		<input type="checkbox"/>	<input type="checkbox"/>	
Agent Name					<input type="checkbox"/>	<input type="checkbox"/>	
► Business Partner					<input type="checkbox"/>	<input type="checkbox"/>	
Cargo Duty Declaration Number					<input type="checkbox"/>	<input type="checkbox"/>	
► Employees					<input type="checkbox"/>	<input type="checkbox"/>	
G/L Accounts					<input type="checkbox"/>	<input type="checkbox"/>	
Item Groups					<input type="checkbox"/>	<input type="checkbox"/>	
► Items					<input type="checkbox"/>	<input type="checkbox"/>	
Price Lists					<input type="checkbox"/>	<input type="checkbox"/>	
Project Codes					<input type="checkbox"/>	<input type="checkbox"/>	
Sales Employee					<input type="checkbox"/>	<input type="checkbox"/>	
Users					<input type="checkbox"/>	<input type="checkbox"/>	
Warehouses					<input type="checkbox"/>	<input type="checkbox"/>	

OK Keys Update Remove

The screenshot shows the SAP Activity dialog box with the following details:

- Activity:** Task (highlighted with a red box)
- Type:** General
- Number:** 1
- BP Code:** C20000 (Customer)
- BP Name:** Norm Thompson
- Assigned To:** manager
- Contact Person:** Norm Thompson
- Telephone No.:** 020 5894 9487
- Personal:**

Below the tabs (General, Content, Linked Document, Attachments), the following fields are visible:

- Remarks:** Prepare the materials for the product demo.
- Start Date:** 25.05.10
- Due Date:** 25.05.10
- Priority:** Normal
- Meeting Location:** (empty)
- Status:** Not Started
- Inactive:**
- Closed:**
- Buttons:** OK, Cancel, Follow Up

On the right side, a secondary dialog box titled 'General' is open, showing:

- Hour:** 10:30
- Reminder:** 00:05

Save the query below in the Query Generator.

```

Select
  Distinct T2.ClgCode,
  T2.CardCode,
  T2.ContactPer,
  T2.Tel,
  T2.DetailsFrom
OALT T0
Inner join
ALT1 T1 On
T0.Code = T1.Code
Inner Join
OCLG T2 on
T1.UserSign = T2.AttendUser
WHERE
  T2.Action ='T' and
  T1.UserSign is not Null and
  Convert(char,T2.Recontact,104) = Convert(char,getdate(),104) and
  T2.Closed= 'N' and
  Convert(char,(T2.U_hour -T2.U_Reminder),108)>= Convert (char,getdate(),108)

```

- Set up an *Alert* using the above query. Indicate the SAP Business One users that should receive the alert.

Alerts Management

Name: Priority:

Active Query Alert

#	To	Int.	E-Mai	SMS	Fax
1	Bli	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Bill Levine	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Bob Shone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Brad Thomps	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Donna Brown	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Doris Labour	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Fred Buyer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	James Chan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Jim Boswick	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	John Petersor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Frequency: Every

Save History

3. In the *Administration -> System Initialization -> General Settings -> Services tab window*:
 - Tick the *Send Alert for Activities Scheduled for Today* option.
 - Tick the *Display Inbox When New Message Arrives*
 - The number of minutes in the *Update Messages* field should be set to a minimum to ensure frequent updates.

General Settings

BP Budget Services Display Font & Bkgd Path Stock

At the Beginning of Each Session

Perform Data Check

Open Exchange Rates Table

Display Recurring Postings on Execution

Send Alert for Activities Scheduled for Today

Display Inbox When New Message Arrives

Open Window for Credit Voucher Ref. Update

Open Post-Dated Cheques Window

Internet Definitions

Use Proxy Server for Web Connection

Update Messages (Min.) 1

Screen Locking Time (Min.) 30

Open Post-Dated Credit Vouchers Window No

Telephone No. _____

Area Code _____

For External Line _____

History / Log 99

OK Cancel

4. When a reminder for the *Task* becomes due, an alert will appear in the *Messages/Alert Overview* window.

Messages/Alert Overview

Inbox Outbox Sent Messages

!	Subject	Date	From	
!	Tax Exemption Expiry	25.05.10	Server	✉
	Activities Scheduled for Today	25.05.10	Server	✉

#	BP Code	Contact Person Name	Telephone	Remarks
1	C20000	Norm Thompson	020 5894 9487	

Forward Reply Delete Out of Office

Related Contents

- [SAP Business One in Action Catalog Page](#)
- [Link to DRC](#) documentation
- Note [870570](#)
- For more information, visit the [Business One homepage](#).

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