Alerts Popup for Users on Login

This feature must be implemented by Commerce Vision for your site.

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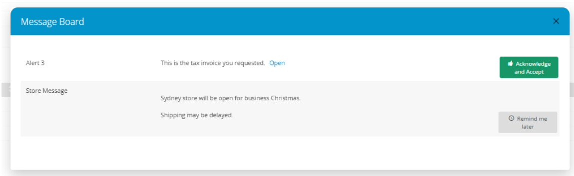
Overview

Add a popup window with timely alerts that will automatically display after a user has logged into your website. This allows you to add current or important messages that your registered customers will not miss. Alerts can also be set to displayed only to specific users or customers. You can also add user interaction buttons so that an alert must be 'acknowledged and accepted' and a reminder button so the user can re-read the message at any time. You can also attach documents to an alert.



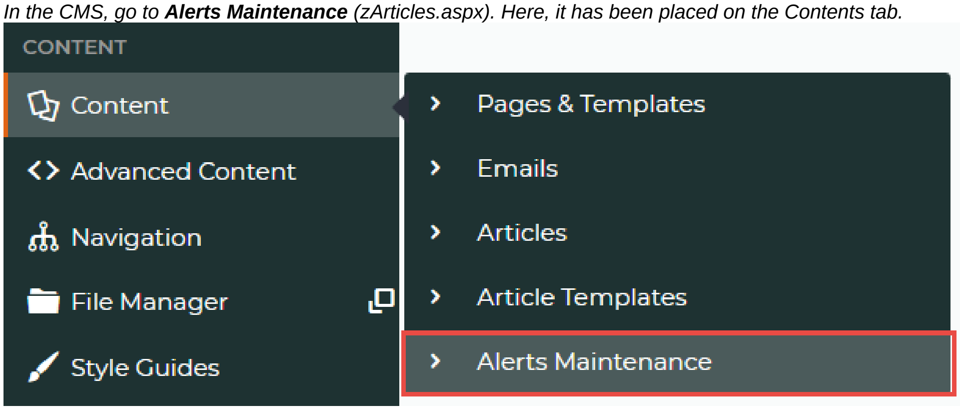
Step-by-step guide

This guide assumes the Alerts Popup feature has been set up for your site.

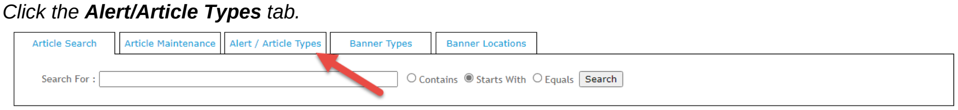
Create Alert Type

Every alert message is linked to an Alert Type. This allows you to group certain alert messages together and create separate alert groups for different purposes. Note that all alerts a user qualifies for will be displayed on the popup regardless of which alert type it is linked to.

1. *In the CMS, go to **Alerts Maintenance** (zArticles.aspx). Here, it has been placed on the Contents tab.*



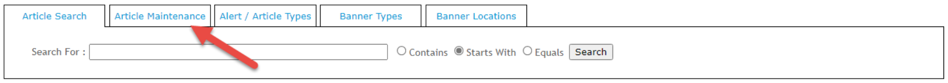
2. *Click the **Alert/Article Types** tab.*



3. *Click **New**.*
4. *In **Code**, enter a meaningful word for this alert type, e.g., 'Shipping' etc. This will display to the user.*
5. *In **Description**, enter a description for this alert type.*
6. *To save, click **OK**.*

Create an Alert Message

1. Click the **Article Maintenance** tab.



2. Click **New**.

3. In **Article Type**, select 'Alert'.

4. In **Name**, enter a name for the alert message.

5. In **Description**, enter the message. **TIP -** You can use basic html and style tags to format the alert.

6. In **Alert Page Type**, select the alert type this alert is grouped under.

7. If this alert is to be active as soon as it is saved, tick **Is Alert Live**.

8. In **Article Posted,** today's date defaults. Change it if needed. This indicates the creation date.

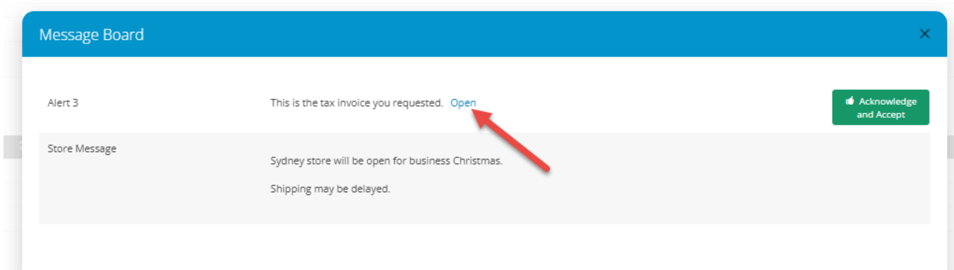
9. In **Start Date** and **Expiry Date**, enter the period the alert is active.

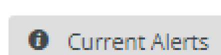
10. If the alert applies to all users, leave the next few fields blank. Or you can define the alert for a subgroup of users, or even one user. **NOTE -** The wildcard character is: % This can stand for one or more characters in a text value.

Field	**Use**
Customer Type	Trade 'B2B' or Consumer 'B2C' users.
Customer Warehouse	Limit by Warehouse Code.
Customer Code	Limit by (default) Customer Code.
Bill to Customer Code	Limit by Bill to Customer Code. (Used with Cost Centres)
Alert Contract Code	Limit by Contract Code. (Used with Contract Items)
Alert Initial Roles	Limit by initial role after login.
User's Email Address	Limit to specific users

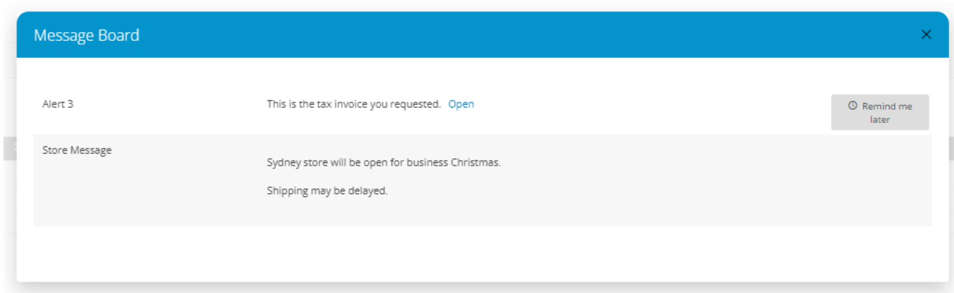
11. To add a link to a document, select the document. **NOTE -** This must have been uploaded via Upload General Documents.

    When the user clicks on the link, the document opens.

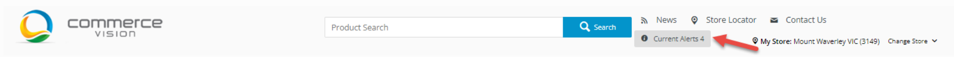


12. To let the user select to see the message again, tick **Alert Remind Later.** A 'Remind Me Later' button will display for the Alert Type in the popup. If the user clicks it, a 'Current Alerts' 

button displays on the user's home page. The user can click on it to view the message again. **NOTE:** For the button to display, the 'Hide Alerts flagged as 'Remind me later?'' toggle in the Alerts Popup Widget must be OFF.



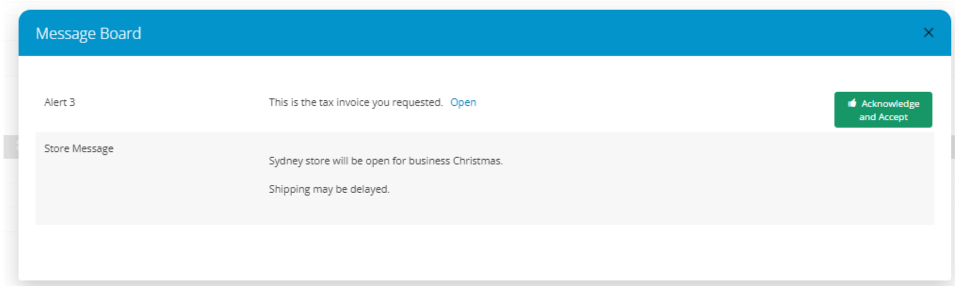
*When the user clicks the 'Remind me later' button, the **Current Alerts** button displays on the Home Page. (Where it displays depends on the zone in which the Alerts Popup Widget is located.) **TIP-** You can also enable the counter in the widget so that the number of messages is indicated.*



When the user clicks 'Current Alerts', the alerts popup displays.

***NOTE -** If the 'Acknowledge and Accept' button is also available, if user clicks it, this will cancel the reminder for that message.*

13. *If you want an alert type to keep displaying until the user acknowledges and accepts it by clicking a button, tick **Alert Acknowledgement Required**. An Acknowledge and Accept button will display next to the Alert Type. **NOTE -** By default, the message will not be displayed again if a user clicks the button. For the message and button to display each new session, ensure the 'Hide Alerts Already Acknowledged?' toggle in the Alerts Popup Widget is OFF.*



14. *To save, click **OK**.*

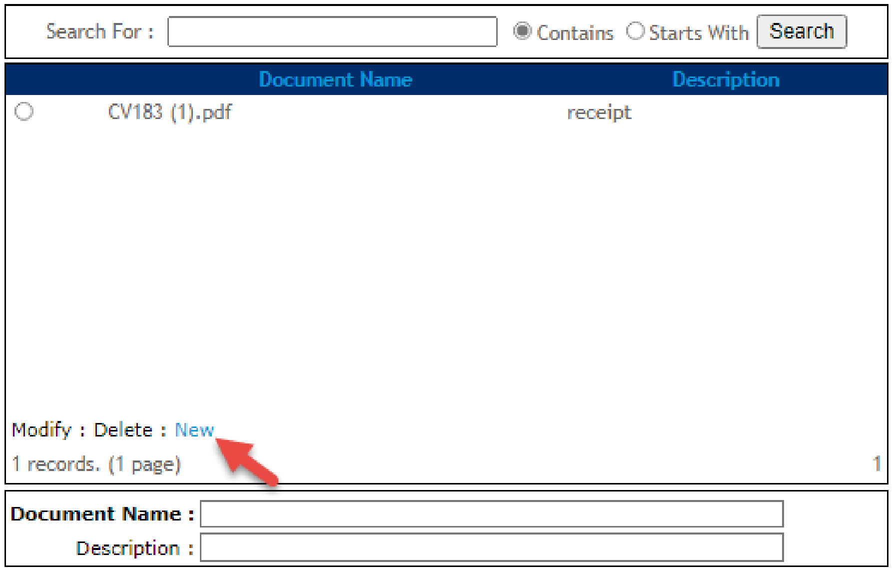
Upload a document for Alerts

A document must be added if it is to be attached to an alert.

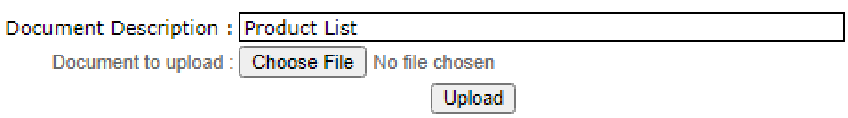
To upload a document:

1. *Go to **System Preferences Upload General Documents**.*

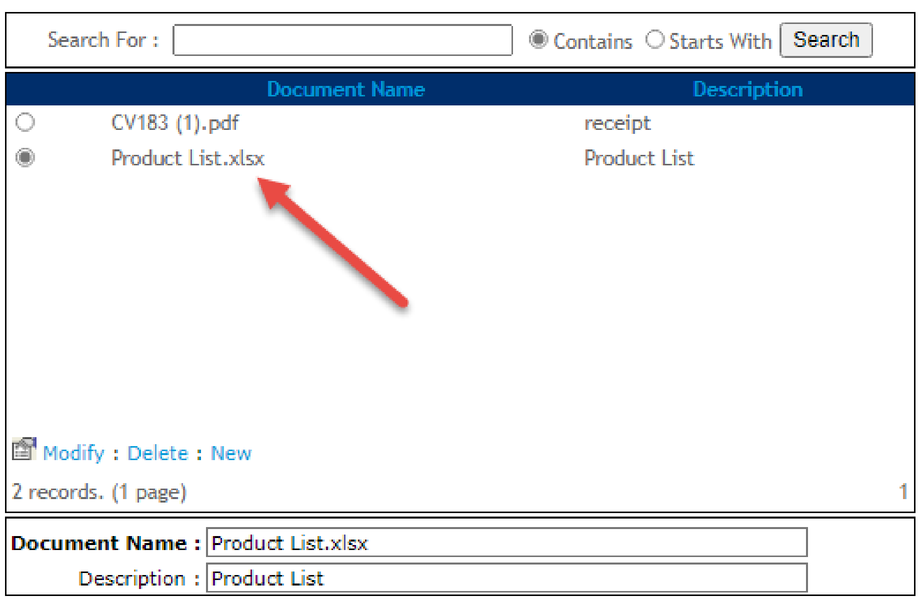
2. *Click **New**.*



3. *In **Document Description**, enter a description of the file.*
4. *Click **Choose File**.*
5. *To add the document, click **Upload**.*



6. *The document is now listed and available for selection when creating an alert.*



Add/Edit the Alerts Popup Widget

For the alert popup window to display, the Alerts Popup Widget must be added to either the Home Page or Theme template.

To add/edit the Alerts Popup Widget,

1. *Go to the template you need (**Content Content Pages & Templates Theme Layout** OR **Home Page**).*
2. *Click **Edit**.*
3. *Go to the zone you want and click **Add Widget**. **TIP-** It does not matter which zone. The alert displays in the centre of the screen.*
4. *Find the **Alerts Popup Widget** and add it.*
5. *You can configure display settings for the popup in the widget. See: Alerts Popup Widget.*
    - *Add the heading for the popup window*
    - *Control the 'Acknowledge and Accept' button*
    - *Control the 'Remind me later' feature*
    - *Edit button labels and text*

Additional Info

Minimum Version Requirements	4.31
Prerequisites	--
Self Configurable	No
Business Function	User
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- Alerts Popup Widget