



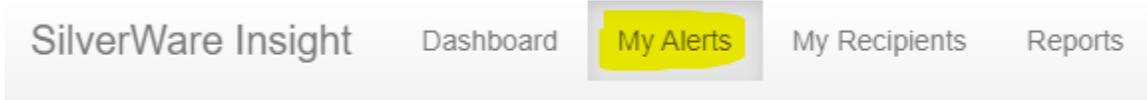
SILVERWAREPOS

HOW TO CREATE INSIGHT ALERTS

The following steps will guide you through how create automated reports to send to your E-mail or text.

INSTRUCTIONS: HOW TO CREATE AN ALERT

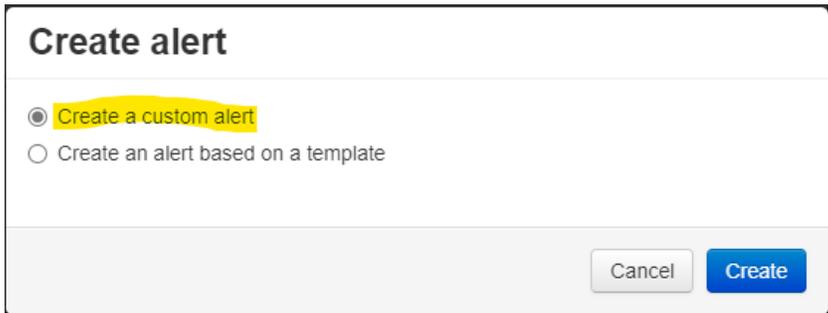
- 1. Open a web browser
- 2. Go to insight.silverwarepos.com
- 3. At the top, click on “My Alerts”



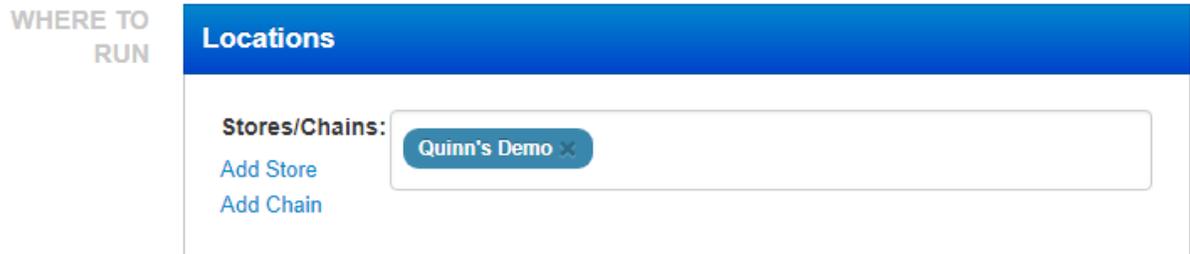
- 4. Click the ‘+ New Alert” button to add a new alert



- 5. Select “Create a Custom Alert”



- a. Name your Alert
- b. Next a location must be entered, this can take the form of a single store, multiple stores, a single chain or multiple chains



- c. You can enter a message that will accompany the email

- d. You can add a databit by clicking the “Add Group” button, by default a blank data group is pre-generated. In each data group you can change the data group’s name by clicking it (it says “Additional Data” by default). You can also add a databit by clicking the “Add Data” button.
- e. You can add any number of the pre-set attachments to the email by clicking the “Add Attachment” button.
- f. Add the Recipients you would like to receive this report. Valid recipients including a single person, multiple persons, a single group or multiple groups by clicking the “Add Recipient” and/or “Add Group” buttons respectively.

WHAT TO REPORT

✓ Email

Message:

Data Groups:
[Add Group](#)

Additional Data ✕

No data. Click **Add Data** to assign some data to this group.

[Add Data...](#)

Attachments:
[Add Attachment](#)

Recipients:
[Add Recipient](#)
[Add Group](#)

6. Next you must select the time of day you wish the email/message to be sent. You can select from the following options:
- **Start of business day** – When the system of the selected store(s) is opened for the day this alert will be triggered.
 - **At a specific time** – A the specified time (rounded to each fifth minute) each day this alert will be triggered.
 - **Within a time range** – A start and end time (rounded to each fifth minute) is selected along with an interval that will determine how often the alert is triggered.
 - **End of business day** - When the system of the selected store(s) performs an end of day this alert will be triggered.

Time

Start of business day
 At a specific time
 Within a time range

Start Time: 9:00 AM

✕

⋮

End Time: 5:00 PM

✕

⋮

How often:

Every 30 minutes ▼

End of business day

7. Next you must select which days this alert will be triggered on. Firstly, you can toggle which days of the week this alert will be triggered on by clicking their corresponding button. Lastly, you can enter in a start date and end date, between these dates, in correspondents to the parameters set in the pervious section and on the day of the week chosen will determine when this alert is triggered.

Day

Only enable this alert on the following days of the week:

Monday Tuesday Wednesday Thursday

Friday Saturday Sunday

Only enable this alert within the following date range:

Start Date: 27 Sep 2018

End Date: 10 Oct 2018

INSTRUCTIONS: HOW TO CREATE A RECIPIENT

Your recipients are people/groups you manage here for them to receive alerts. By default, your own name and email will exist in a pre-generated recipient.

1. To create a new recipient, click the “Add Recipient” button.
2. Once clicked a black recipient will be generated.
3. To edit a recipient’s name, email or mobile phone number simply click the corresponding fields and enter the desired information into the text box that appears and click the check mark button to confirm the information.
4. You can also delete a recipient by clicking the trash can button on the right of the recipients.

SilverWare Insight Dashboard My Alerts **My Recipients** Reports  [Log Off](#)

Recipients

| | | | |
|---|--|---------------------|---|
| <input type="text" value="Aristotle@SilverWare.com"/> | Email: <input type="text" value="Aristotle@silverware.com"/> | Mobile: <i>None</i> |  |
|---|--|---------------------|---|

Groups

You have no groups.

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