

# BitFaster Alerts: Transactional Email

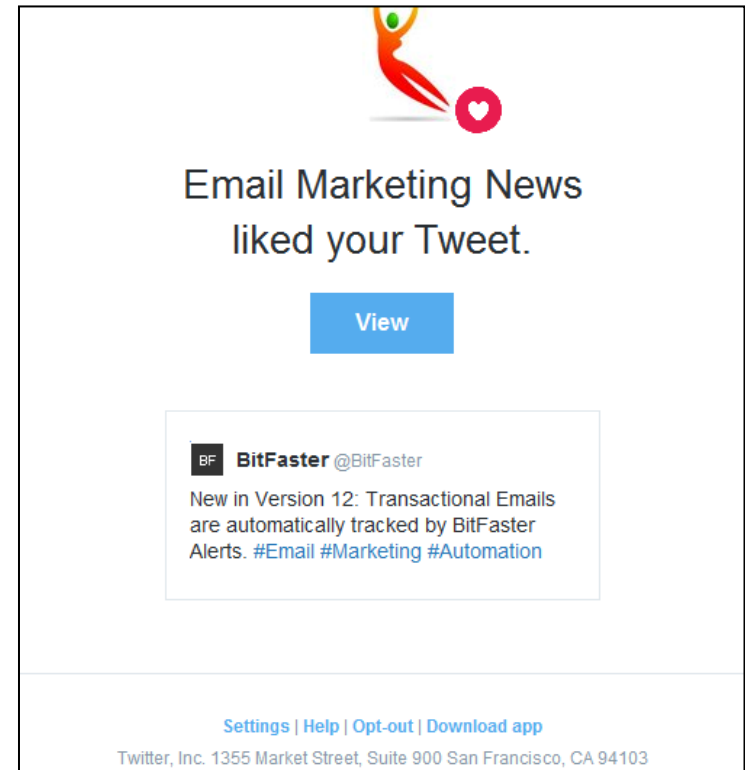
## What are Transactional Emails?

Transactional emails or triggered emails, are messages that are sent based on a specific action.

For example, Twitter sends an automated email to the person who posted the Tweet whenever someone likes it.

Some examples of where you can use Transactional Messages:

1. Welcome Message (on sign up)
2. Password Reset
3. Abandoned Cart
4. Support Ticket Confirmation
5. Order Placed
6. Payment Received

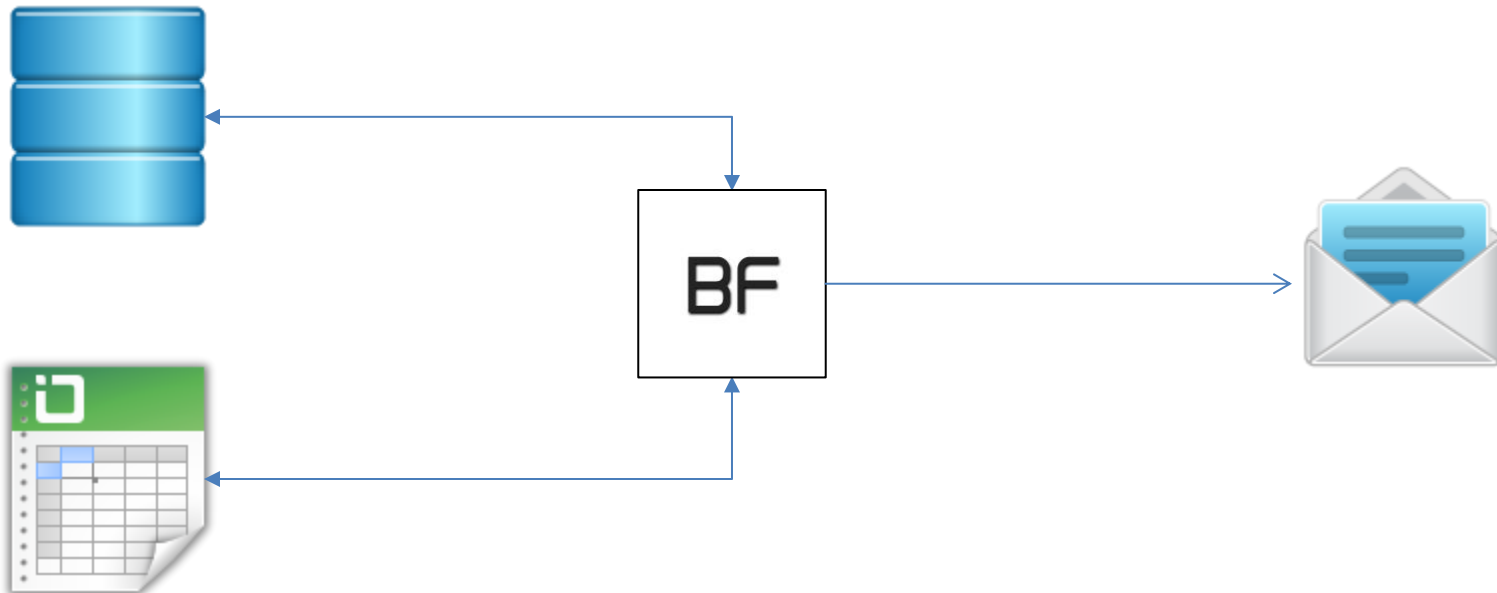


# BitFaster Alerts: Transactional Email

## What is BitFaster Alerts?

BitFaster Alerts is an application that enables you to connect to any Data Source within your Network and trigger emails based on the Query/Condition(s) you apply.

A Query is basically an SQL statement which is used to filter data from a Data Source such as an Access or Oracle Database. An Excel Worksheet can also act as a Data Source.



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## How can I setup an Alert?

Before you create an Alert, you need to make sure you configured a Connection String.

A Connection String tells BitFaster details about the Data Source such as the physical path, type of Provider etc.

There is no limit to the number of Connection Strings you can define in BitFaster. Each Connection String can point to a different Data Source.

Depending on the type of Database you want to connect to, the Connection String configuration will vary. If you are not sure about how to go about, please check with your Application Developer.

In the next few slides, we will run through a Step-by-Step process of configuring an Alert.

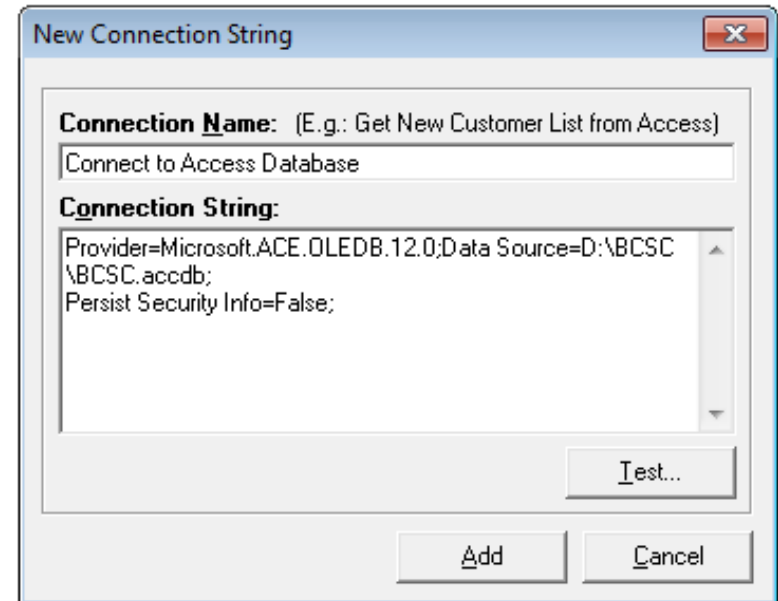
# BitFaster Alerts: Transactional Email

## Step 1: Configure a Connection String

Make sure you have BitFaster application open and choose Connection Strings under Transactional Messages in the tree view on the left window pane. Now right click on the right window pane and choose New Connection String.

The Connection Name can be up to 100 characters and is for your easy reference. The Connection String is the actual information which tells BitFaster details about the database to connect to.

You can Test the connection to make sure it's working before you can Add it.



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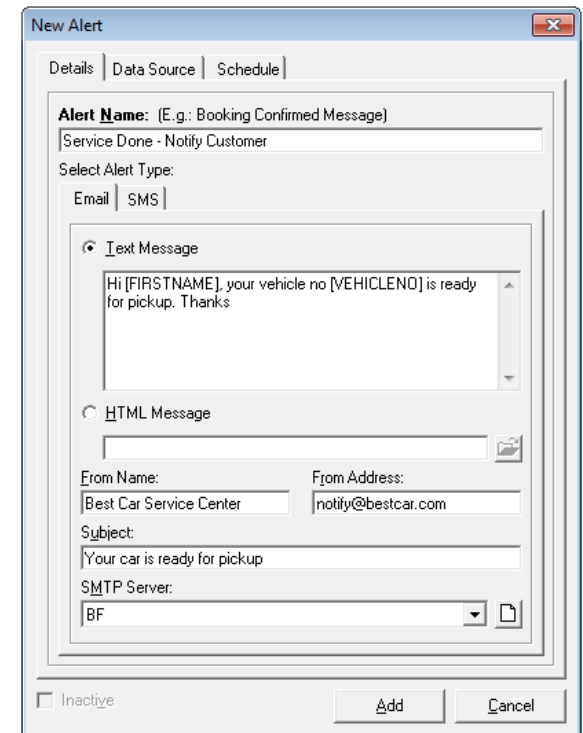
## Step 2: Create an Alert

Make sure you have BitFaster application open and choose Alerts under Transactional Messages in the tree view on the left window pane. Now right click on the right window pane and choose New Alert.

### Details Tab:

The Alert Name is for your reference and can be up to 100 characters. Alerts can be of 2 types – Email and SMS. We will discuss about Email Alerts here.

An Email alert can either be just Text or you can design an HTML message. The From Name, From Address and Subject fields are mandatory. You have to select an SMTP Server to send out the Email alerts.



The screenshot shows the 'New Alert' dialog box with the 'Details' tab selected. The 'Alert Name' field contains 'Service Done - Notify Customer'. The 'Select Alert Type' section has 'Email' selected. Under the 'Text Message' radio button, a text area contains the message: 'Hi [FIRSTNAME], your vehicle no [VEHICLENO] is ready for pickup. Thanks'. The 'HTML Message' radio button is unselected. The 'From Name' field contains 'Best Car Service Center', the 'From Address' field contains 'notify@bestcar.com', and the 'Subject' field contains 'Your car is ready for pickup'. The 'SMTP Server' dropdown menu is set to 'BF'. At the bottom, there is an 'Inactive' checkbox, an 'Add' button, and a 'Cancel' button.

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## Step 2: Create an Alert

### Data Source Tab:

In this tab you will choose the Connection String name (created in Step 1) and enter the SQL statement to pull the records.

Please check with your Application Developer for the correct SQL statement. Click on the Run Query button to execute the Query. BitFaster will display the fields and records if any in a new window. Once this is done, the Select Field for Email Communication drop down is automatically filled with the field names. Just pick the correct field name which has Email addresses.

Post Alert Action can be added only once you Add an Alert. This feature is useful if you wish to update/write back to the database.

The screenshot shows the 'New Alert' dialog box with the 'Data Source' tab selected. The 'Connection String' dropdown is set to 'Connect to Access Database'. The 'SQL Statement (Data Pull - one or more Records):' text area contains the following query:   
`Select sm.id as ServiceRecordID, cm.Salutation, cm.FirstName, cm.Email, vm.VehicleNo from customer_master cm, vehicle_master vm, service_master sm where cm.id = vm.customerid and vm.customerid = sm.customerid and vm.id = sm.vehicleid and sm.servicedate = date() and sm.emailsent = false`   
Below the SQL statement is a 'Run Query...' button. Under 'Select Field for Email communication:', a dropdown menu shows 'Email'. The 'Post Alert Action (Data Push - for every Record):' section has a table with one row: 

Action Name

 To the right of the table are buttons: 'New...', 'Edit...', 'Delete...', 'Move Up', and 'Move Down'. At the bottom left is an 'Inactive' checkbox. At the bottom right are 'Add' and 'Cancel' buttons.

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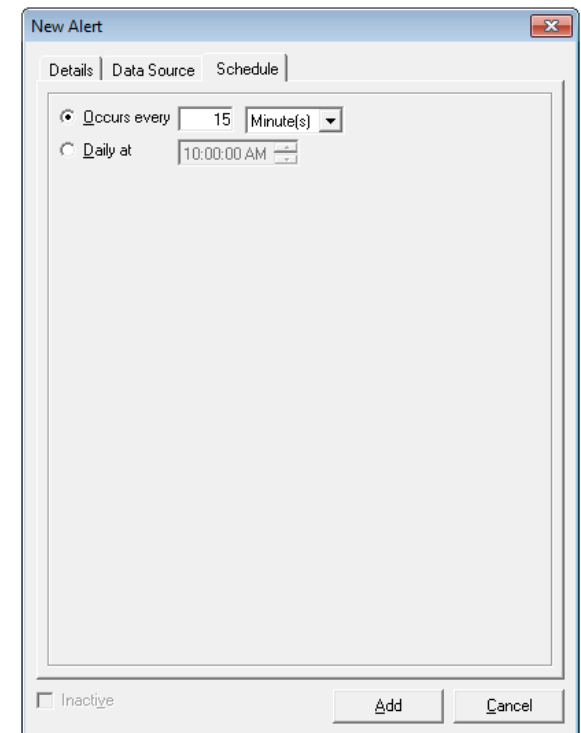
## Step 2: Create an Alert

### Schedule Tab:

You can configure BitFaster to connect to the Database at scheduled interval of time.

Alerts can be executed once a day or at regular periods.  
For example, you can run the Alert every 15 minutes.

Please make sure that the BitFaster Alerts Manager window is open in order to run the Alerts.



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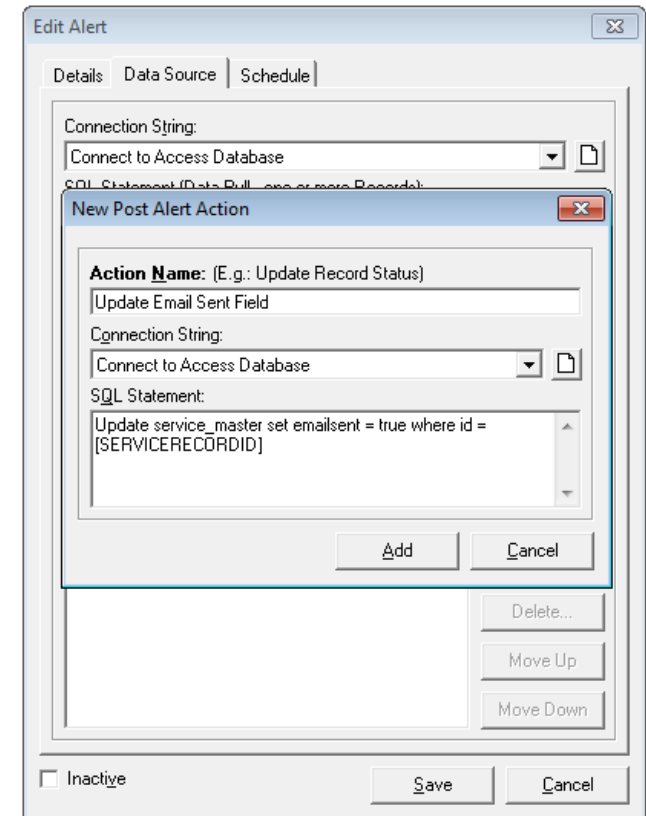
## Step 3: Define Post Alert Action

Post Alert Actions allow you to Push data back to one or more databases. You can define actions in a sequence. BitFaster triggers each of those actions in the same sequence once an Alert message is sent.

These actions can be defined in the Edit Alert mode only.

Under Post Alert Actions, click on the New button. In the New Post Alert Action window, enter the Action Name (up to 100 characters), select the Connection String and enter the SQL statement that should be executed.

In this case we are updating the record and setting the EmailSent field to True once the Alert is sent.



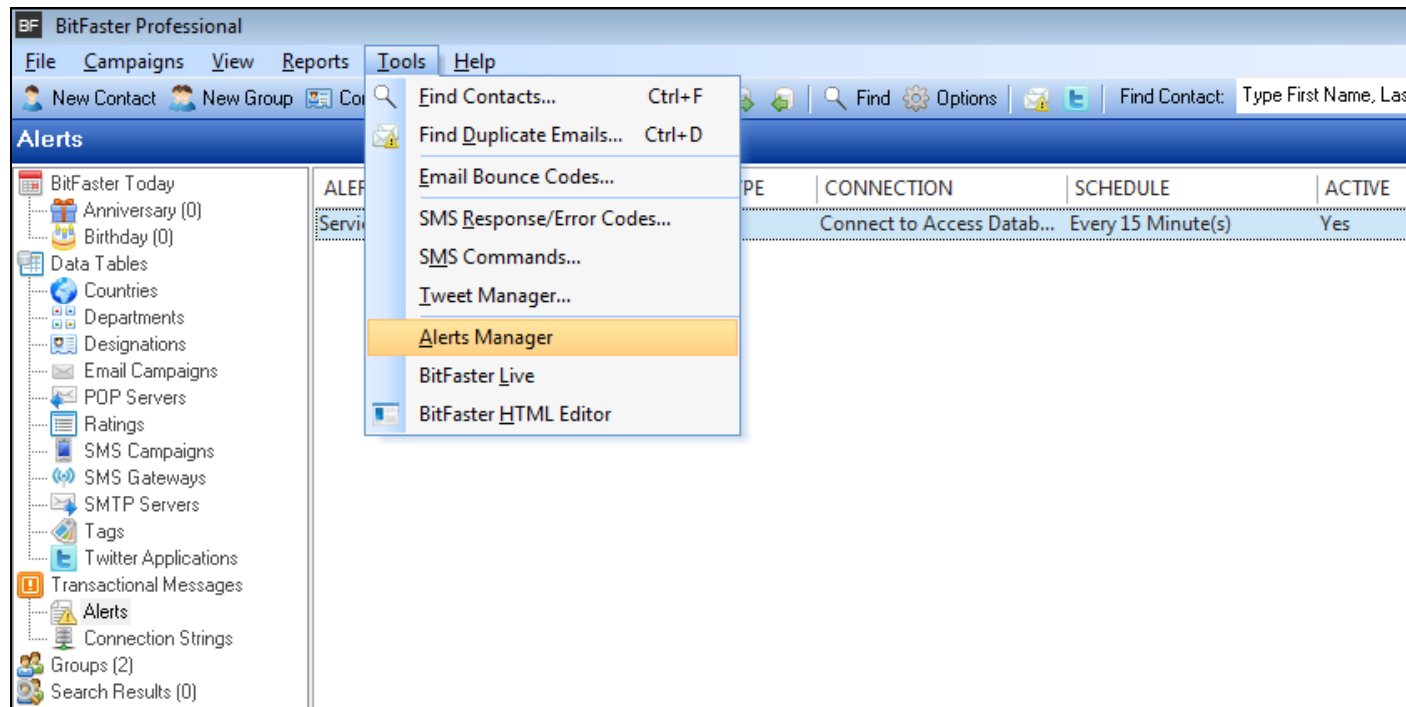


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## Running Alerts

Once you have defined Alerts, you can run the BitFaster Alerts Manager application. This application manages all the Active Alerts.

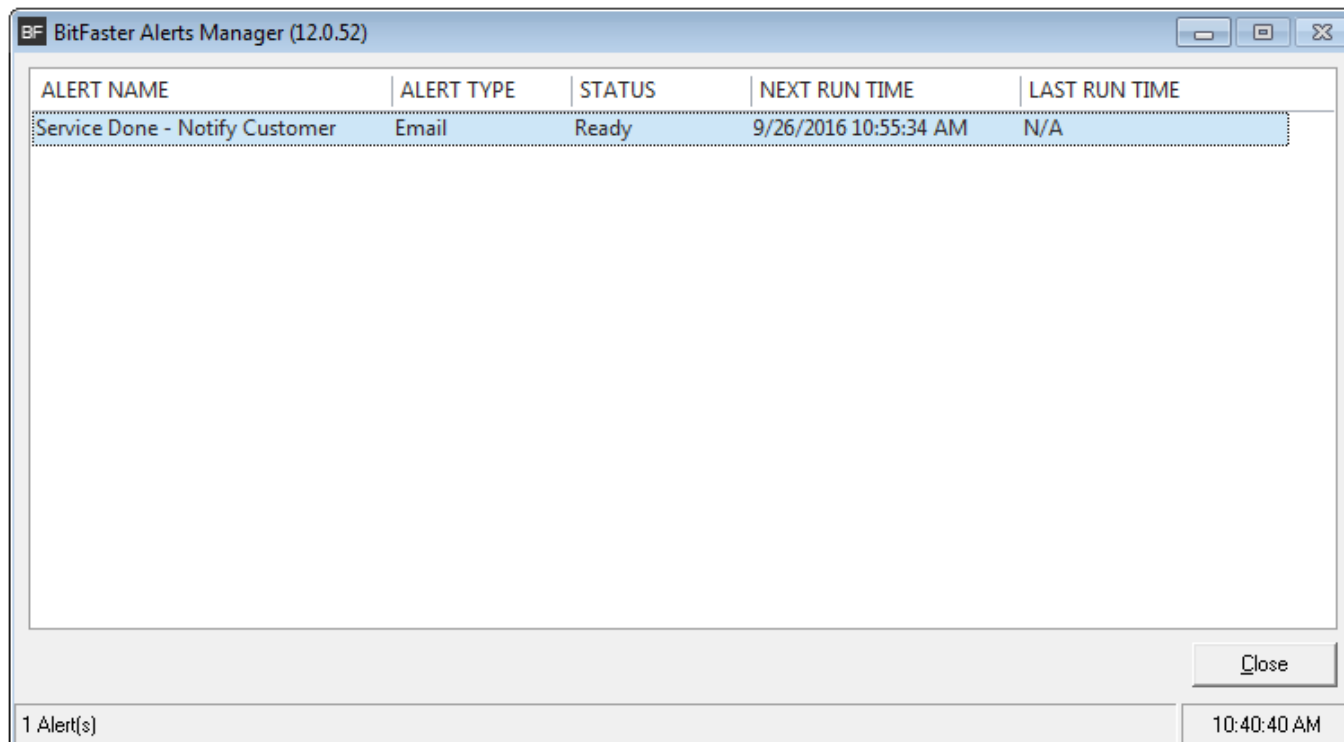
Please check with Success Planned on the number of Alerts you can run at a time.



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## BitFaster Alerts Manager

BitFaster Alerts Manager manages both Email and SMS Alerts. Please make sure you have a valid BitFaster Results account (details to be updated in the Options window).



# BitFaster Alerts: Transactional Email

## BitFaster Alerts – Free Trial

You can try out BitFaster Alerts for 15 days absolutely free. Please contact Success Planned at [support@bitfaster.com](mailto:support@bitfaster.com) and you can mention about the trial.

Please follow the steps below before you request for the trial account:

1. Install BitFaster Professional 12 on your Computer
2. From the Options window, click on BitFaster Results tab
3. Copy the System Code and paste it in your email to Support

Once approved, we will also provide an SMTP account so that you can try Email Alerts. Our support team will try to help you configure the Connection String depending on the Database you wish to use. Please keep in mind that you might have to involve the Application Developer to write the SQL statements.

If you wish to try out SMS Alerts, please use any SMS Gateway which supports HTTP/S protocol. They should give you the required API details.