



Cash flow management. Solved.

ALERTS & SUBSCRIPTIONS

USER GUIDE

What is Alerts & Subscriptions?

- To inform and notify recipient by email for functionality used or not used and to receive reports on a daily, weekly or monthly basis.

When to use it?

- To notify you if an action was done or not done e.g. processing a cash up
- To inform you when a functionality was used or not used.
- Report can be automatically emailed to your Accountant/Bookkeeper eliminating manual record keeping.

SUBSCRIBE TO ALERTS & SUBSCRIPTIONS

1. Click on REPORTING.
2. Click on REPORT SUBSCRIPTIONS.



ALERTS & SUBSCRIPTIONS MANAGE SCREEN

1. Click on **NEW SUBSCRIPTION** to subscribe a new email address to receive alerts & subscriptions.
2. Select and highlight the email address you want to edit or delete and follow steps below.
3. Click on **EDIT SUBSCRIPTIONS** to edit alerts & subscriptions for selected email address.
4. Click on **DELETE SUBSCRIPTIONS** to delete subscription for selected email address.

➤ You are able to subscribe multiple email addresses to receive alerts & subscriptions.

id	email	receipt book
1264	on.co.za	Nexion SA
720	dc@nexion.co.za	Nexion SA
719	cmarcus@nexion.co.za	Nexion SA
37	URICHARDS@NEXION.CO.ZA	Nexion SA
33	clleroux1991@gmail.com	Nexion SA
32	urichards@nexion.co.za; utahrich@gmail.com	Nexion SA
27	clleroux@nexion.co.za	Nexion SA
25	pmelchior@nexion.co.za	Nexion SA

ALERTS & SUBSCRIPTIONS EDITING SCREEN

1. Enter email address you want to subscribe to, for alerts & subscriptions.
2. Select **RECEIPT BOOK**.
3. Tick box to include **WEEKENDS** and **PUBLIC HOLIDAYS**, if applicable.
4. Tick relevant box to receive **DAILY**, **WEEKLY** or **MONTHLY** recon reports.
5. Tick relevant box to receive an alert as a reminder when tasks are not completed.
6. Enter number of days that must pass before alert is sent.

The screenshot shows the 'NEXION ALERTS & REPORTS SUBSCRIPTIONS (721)' editing screen. It features a form with the following elements:

- DESTINATION EMAIL:** cmarcus@nexion.co.za (Callout 1)
- RECEIPT BOOK:** Nexion SA (Callout 2)
- INCLUDE WEEKENDS & HOLIDAYS FOR ALERTS (Callout 3)
- Frequency selection for reports:
 - RECEIVE RECEIPT BOOK RECON REPORT: EVERY DAY, EVERY WEEK, EVERY MONTH
 - RECEIVE BANK ACCOUNT RECON REPORT: EVERY DAY, EVERY WEEK, EVERY MONTH (Callout 4)
- Alert configuration options (Callout 5):
 - ALERT ME WHEN THERE HAS BEEN NO AUTO RECON FOR [7] DAYS (Callout 6)
 - ALERT ME WHEN THERE HAS BEEN NO SUCCESSFUL CARD TRANSACTION FOR [1] DAYS
 - ALERT ME WHEN THERE HAS BEEN NO SUCCESSFUL CASH TRANSACTION FOR [1] DAYS
 - ALERT ME WHEN THERE HAS BEEN NO SUCCESSFUL EFT TRANSACTION FOR [1] DAYS
 - ALERT ME WHEN THERE HAS BEEN NO SUCCESSFUL MEDICAL AID TRANSACTION FOR [1] DAYS
 - ALERT ME WHEN THERE HAS BEEN NO CASH UP FOR [1] DAYS
 - ALERT ME WHEN CONTENT OF TILL EXCEEDS R [2000.00] (ALERT TRIGGERED MIDNIGHT)
 - ALERT ME WHEN A CASHUP IS DONE AND SEND ME A COPY
 - ALERT ME WHEN AN AUTO RECON WAS INITIATED AND SEND ME THE SUMMARY
 - ALERT ME WHEN A REFUND IS PROCESSED AND SEND ME A COPY
 - ALERT ME WHEN A DEBIT ORDER PAYS OUT
- NOTE:** A notification email will be sent to the Destination Email address upon modification
- Buttons: **CLOSE** and **SAVE**

ALERTS & SUBSCRIPTIONS EDITING SCREEN CONTINUING

7. Tick box and enter maximum amount you want in till before doing cash up and banking.
8. Tick relevant box to receive an alert when task is initiated and, a copy of report will be attached.
9. Click on **SAVE** to save subscription.

➤ An alert will be triggered at midnight, when maximum till content is exceeded.

❖ To process a **CASH UP** click on link here:
<https://www.nexion.co.za/wp-content/uploads/2020/06/Till-Control-Cash-Up-User-Guide-Ver181122.pdf>

NEXION ALERTS & REPORT SUBSCRIPTIONS (721)

DESTINATION EMAIL:

RECEIPT BOOK:

INCLUDE WEEKENDS & HOLIDAYS FOR ALERTS

RECEIVE RECEIPT BOOK RECON REPORT EVERY DAY EVERY WEEK EVERY MONTH

RECEIVE BANK ACCOUNT RECON REPORT EVERY DAY EVERY WEEK EVERY MONTH

ALERT ME WHEN THERE HAS BEEN NO AUTO RECON FOR DAYS

ALERT ME WHEN THERE HAS BEEN NO SUCCESSFUL CARD TRANSACTION FOR DAYS

ALERT ME WHEN THERE HAS BEEN NO SUCCESSFUL CASH TRANSACTION FOR DAYS

ALERT ME WHEN THERE HAS BEEN NO SUCCESSFUL EFT TRANSACTION FOR DAYS

ALERT ME WHEN THERE HAS BEEN NO SUCCESSFUL MEDICAL AID TRANSACTION FOR DAYS

ALERT ME WHEN THERE HAS BEEN NO CASH UP FOR DAYS

ALERT ME WHEN CONTENT OF TILL EXCEEDS R (ALERT TRIGGERED MIDNIGHT)

ALERT ME WHEN A CASHUP IS DONE AND SEND ME A COPY

ALERT ME WHEN AN AUTO RECON WAS INITIATED AND SEND ME THE SUMMARY

ALERT ME WHEN A REFUND IS PROCESSED AND SEND ME A COPY

ALERT ME WHEN A DEBIT ORDER PAYS OUT

NOTE: A notification email will be sent to the Destination Email address upon modification