60 Smoke Signals From Your ERP System

When considering what information in your ERP system needs to be monitored and responded to, the conversation usually begins (and often ends) with the identification of scenarios – business conditions that you need to know about and do something about.

These are the "smoke signals" from your ERP system. You need a way to automatically monitor for them, and respond to them.

As you go through these scenarios, keep in mind that sending an alert about them is only one of three ways that you can auto-respond to them.

The other two responses are:

- Generate and deliver a relevant form, document, or report. For example, if a client has past due invoices, the best "response" would be to re-generate and deliver those overdue invoices to the client.

  At the same time, you might also want to generate the A/R Aging Report for that client and deliver that report to the client's salesrep.

- Update the ERP (or other) application with pertinent details. Using the same example of a client with past due invoices, you also might wish to have a process that goes into your ERP system, puts the past due client on credit hold, and then (have the same process) go into your CRM system and schedule the client's salesrep to make a phone call to the client the very next day.

Accounts Receivable "Smoke Signals":

"If only we had known when . . . "

1) " . . . a client had not made a payment in over 'x' days."
2) " . . . a client was put on (or taken off of) credit hold."
3) " . . . a client's credit limit was changed."
4) " . . . a client was within 'x' percent of running out of credit."
5) " . . . a client had past due invoices over 'x' dollars."
6) " . . . a client had an unpaid invoice that was over 'x' days past due."
7) " . . . a salesrep had customers with more than 'x' unpaid invoices."
8) " . . . a customer's address had changed."
9) " . . . a customer's AR balance plus their pending orders was greater than their credit limit."
10) " . . . a salesrep's commission exceeded 'x' dollars."

Accounts Payable "Smoke Signals":

"If only we had known when . . . "

1) " . . . an AP invoice was coming due, we could have avoided the late fee."
2) " . . . an early payment discount was expiring."
3) " . . . an unusually large invoice payment was coming due."
4) " . . . a payment was put on hold – or taken off hold."
5) " . . . a vendor had changed their address or contact info."
6) " . . . our payment terms had changed."
7) " . . . had total invoices to one vendor in excess of 'x' dollars."
8) " . . . a check had been voided today."
9) " . . . a recurring voucher was ending today."
10) " . . . a voucher's discount expired today."

Inventory "Smoke Signals":

"If only we had known when . . . "

1) " . . . this item was approaching its re-order level."
2) " . . . the time-sensitive stock was going to have to be written off."
3) " . . . our vendor had increased our cost by over 'x' percent."
4) " . . . this particular item had not been sold in more than 'x' days."
5) " . . . the profit margin on that item had fallen below 10%."
6) " . . . we had a surplus, we could have had a promotion on that item."
7) " . . . this was a duplicate item number."
8) " . . . we had such a high backorder quantity."
9) " . . . we had a negative on-hand in warehouse 'x' and a surplus in warehouse 'y'."
10) " . . . we had such a high pending order quantity, we would have re-ordered."

Purchase Order "Smoke Signals":

"If only we had known when . . . "

1) " . . . a PO is sitting on someone's desk, waiting approval."
2) " . . . a PO's delivery has been delayed."
3) " . . . a PO for items on backorder has been received."
4) " . . . a PO is due in this week."
5) " . . . we've received less than 50% of the quantity ordered."
6) " . . . more than 20% of the item was received damaged."
7) " . . . the PO has been put on (or taken off of) hold."
8) " . . . the PO's status has changed."
9) " . . . a PO is past its promised delivery date."
10) " . . . a PO's shipping address has been overridden."

Job/Project "Smoke Signals":

"If only we had known when . . . "

1) " . . . this project began to fall behind schedule?"
2) " . . . the project just sat, un-touched, on that person's desk?"
3) " . . . we passed 50% of the budget used?"
4) " . . . someone changed the 'need by' date of that project?"
5) " . . . the required part hadn't yet come in?"
6) " . . . the actual cost exceeded the estimated cost?"
7) " . . . the project wasn't going to meet its deadline?"
8) " . . . the scheduled review was changed to today?"
9) " . . . the project's status was changed?"
10) " . . . accounting approved the expenditure?"

Sales Order "Smoke Signals":

"If only we had known when . . . "

1) ". . . orders meeting those criteria had been placed."
2) ". . . a client has stopped buying from us."
3) ". . . a shipment has been delayed or backordered."
4) ". . . an order included an excessive discount."
5) ". . . there were order configuration errors – like missing parts or incorrect quantities."
6) ". . . an order that should trigger a survey had been received."
7) ". . . that customer's buying trends had changed."
8) ". . . an order is put on (or taken off of) hold."
9) ". . . a client's A/R status was overdue, the order could have been stopped."
10) ". . . a client's payment terms have changed."

KnowledgeSync Alerts & Workflow:

Addressing the above "smoke signals" from your ERP (and related) systems is the KnowledgeSync Alerts & Workflow solution. The most widely used "Business Activity Monitoring" solution on the market today with over 11,000 customers worldwide, KnowledgeSync is the "smoke detector for your business data".

KnowledgeSync ERP

Pay (& Get Paid!) On Time

When was the last time you had to write-off bad debt because you didn't keep on top of a past-due client? When was the last time you missed an early pay discount? Keeping your A/R and A/P data electronically is important; keeping watch over it and taking the right action on it is even more important. KnowledgeSync does the watching and acting for you – whether it's emailing overdue invoices to clients, texting your mobile about an expiring discount, or putting a delinquent client on credit hold. All automatically – so you don't have to.

Monitor Inventory Activity

Stock shortages. Backorders. Too much on-hand; too little on order. Purchase order delivery delays, POs waiting for approval, and item sales that are hot one month and cold the next. The need to keep on top of what's happening in inventory is an endless one, and even when you have the time to check a dozen different conditions, it's the one thing you didn't check that ends up hurting you.

KnowledgeSync auto-monitors not just stock levels, but everything in the lifetime of an inventory item, from initial purchase to delivery, storage, and sale.

Help Your Sales Reps *Sell*

Have you ever seen a sales rep work so hard to close a deal – only to have it shot down by finance because the client hasn't paid their last bill? How about a sales rep who seemed *surprised* when you told them that one of their customers had significantly decreased their purchases last month? KnowledgeSync keeps sales reps on top of their sales. Shipment delayed? Auto-notify the client. Quote about to expire? Auto-deliver it to the prospect. A customer who has changed their buying habits? Alert the sales rep *and* schedule a follow-up phone call between the rep and client.

Know When Something *Didn't* Happen

Sometimes the most valuable information you can get out of your ERP system isn't about what did happen – but what *didn't* happen.

A customer who has stopped buying from you. A stock item that hasn't sold in weeks. A project that has had no activity this month. These kinds of conditions – or "inactivity monitoring" – is precisely what KnowledgeSync does, so your staff doesn't have to.

Because by the time someone utters those fateful words *"Whatever happened to . . . "*, it's almost always too late.

Alert On Errors & Exceptions

Duplicate item numbers; missing email addresses. Exceptionally high discounts; unacceptably low profit margins. And let's not forget about "doctoring the data". We all have our thresholds; we know that errors happen, and that some people will do things they shouldn't.

You might not be able to stop these things from happening, but you can automate the process to *spot* and respond to them. KnowledgeSync is the ultimate exception management tool. You identify the conditions and responses; KnowledgeSync stands guard. Twenty-four hours a day, seven days a week – it is your 'corporate smoke detector'.

> ***"Talk about a game changer in our finance department.***
>
> ***There isn't a working day that goes by that I'm not grateful for this product."***
>
> ***~Rob Gagne***

Automate Report Delivery

How many reports do you run per week – stock status, aged receivables, open POs, check reconciliation . . . the list goes on. And – once a report lands on your desk, is a yellow highlighter pen the first thing you reach for?

KnowledgeSync automates report generation and distribution; not just on a schedule such as daily or weekly, but on an as-needed, *data-triggered* basis. After all, if you highlight only 20% of every report that crosses your desk, why are you receiving the other 80%?

Industry First: Alert Acknowledgements

Sending an alert is good – but knowing that the alert has been received and acknowledged – and letting the recipient respond to that alert, confirming their acceptance of that information – is better. KnowledgeSync offers the industry's first "alert acknowledgement module", enabling everything from customers acknowledging details of their order, to service technicians acknowledging acceptance of a critical service call.

Pre-Configured & Custom Events

To help get up-and-running with KnowledgeSync, the application includes "eventpaks" – collections of preconfigured events for leading front-office and back-office solutions. You also get a wizard-based design engine to create additional events specific to your business needs.

You choose the conditions as well as the responses (alerts, reports, & workflow). Alerts may be delivered via email, text, IM, FTP, fax, and the web, reports include Crystal & SRS, and workflow can trigger updates in any databases. Additional options include "home" versus "work" delivery, holiday handling, and "failover" alerts if the primary recipient is unavailable.

ERP Event Examples	
☑	AP Invoices Due < 'x' Days
☑	AP Invoices on Hold
☑	AP Vendor Pmt Overdue
☑	AR Aged Balance > 'x'
☑	AR Balance Nearing Cr Limit
☑	AR Client No Orders > 'x' Days
☑	AR Invoices Past Due
☑	IC Stock Below Reorder Point
☑	IC Item High Cost Increase
☑	IC Qty on Backorder > 'x'
☑	PO Due This Week
☑	PO Delivery Delayed
☑	PO Status Change
☑	SO Buying Habits Change
☑	SO Order Confirmation
☑	SO Promise Date Change

Monitor All Your Applications

You wouldn't put a smoke detector in just one room of your house, and so why would you safeguard your business by monitoring just one of your business applications? Your business success is dependent on all your solutions – CRM, HR, customer service – and KnowledgeSync monitors and responds to conditions in all of them. Whether individually or jointly, KnowledgeSync is an enterprise-wide solution.