

# Sage Alerts & Workflow

## **60 Smoke Signals Your ERP System Needs Alerts & Workflow**

Monitoring (and responding to) your Sage ERP system for critical, time-sensitive business conditions is essential to the success of your organization. Like a smoke detector, Sage Alerts & Workflow detects, sends alerts about, and automatically responds to changing conditions in your ERP data.

### **Accounts Receivable:**      *"Is it important for you to know when a client . . . "*

- . . . has overdue invoices ?
- . . . is put on credit hold?
- . . . has their credit limit changed?
- . . . gets to within 10% of their credit limit?
- . . . goes over 90 days past due?
- . . . has more than 6 past due invoices?
- . . . has not sent in a payment in over 45 days?
- . . . has their bill-to address changed?
- . . . has repeatedly late payments?
- . . . has their credit status changed?

### **Accounts Payable:**      *"Do you need to know when you have a vendor . . . "*

- . . . with invoices coming due?
- . . . whose early payment discounts are about to expire?
- . . . with an unusually large payment coming due?
- . . . with invoices on hold?
- . . . who changes their billing address?
- . . . with a new reoccurring voucher starting today?
- . . . who changes their payment terms?
- . . . with invoices in excess of a certain total?
- . . . with a new voucher over 'x' dollars?
- . . . who is newly-added to your ERP system?

### **Inventory:**      *"Would it help to manage your inventory if you knew when . . . "*

- . . . an item is approaching its re-order level?
- . . . an inventory lot is about to expire?
- . . . a vendor increases your cost by more than 'x' percent?
- . . . an item has not been sold in the last 30 days?
- . . . your profit margin on an item falls below 'x' percent?
- . . . an item is in overstock?
- . . . you have duplicate item numbers?
- . . . you have abnormally high backorder quantities?
- . . . you have a negative on-hand situation?
- . . . an item's standard cost is changed?

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## **Purchasing:**                    *"Do you need to know when . . . "*

- . . . a PO is awaiting approval for more than 'x' days
- . . . a PO's delivery is delayed
- . . . you receive items for orders on backorder
- . . . there are critical POs due for delivery this week
- . . . you receive less than 'x' percent of the quantity ordered
- . . . more than 'x' percent of the shipment is received as damaged?
- . . . a PO is put on hold?
- . . . a PO's status is changed?
- . . . there's a large variance between quantity ordered & received?
- . . . a PO's shipping address is overridden . . .

## **Jobs / Projects:**                    *"Would it help to know when a project. . . "*

- . . . begins to fall behind schedule?
- . . . has not been updated in over a week?
- . . . surpasses 50% of its allocated budget?
- . . . has its 'need' date changed?
- . . . is stalled because a required part hasn't come in?
- . . . has an actual cost that exceeds the estimated cost by more than 20%?
- . . . isn't going to meet its deadline?
- . . . has its scheduled review date changed?
- . . . has its status changed?
- . . . has its expenditure approved by accounting?

## **Sales Orders:**                    *"Would it be good for sales if you knew when . . . "*

- . . . an order for a major client is placed?
- . . . an order's shipment is going to be delayed?
- . . . a backordered item is received in inventory?
- . . . an order with an abnormally high discount is placed?
- . . . an order is missing a key component?
- . . . an order is placed by a client with delinquent invoices?
- . . . a client stops buying from you?
- . . . an order is put on credit hold?
- . . . you get an order from a new client?
- . . . an order's profit margin is below a certain threshold?

## **A smoke detector for your business data**

Go to [www.alertsandworkflow.com](http://www.alertsandworkflow.com) and take the Alerts & Workflow Needs Assessment to see what parts of your organization could most benefit from Sage Alerts & Workflow.