

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 . . . "*

- . . . had overdue invoices ?
- . . . was put on credit hold?
- . . . had their credit limit changed?
- . . . got to within 10% of their credit limit?
- . . . went over 90 days past due?
- . . . had more than 6 past due invoices?
- . . . had not sent in a payment in over 45 days?
- . . . had their bill-to address changed?
- . . . had been late paying 3 times in the last 6 months?
- . . . had 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 has changed their billing address?
- . . . with a new reoccurring voucher starting today?
- . . . who has changed their payment terms?
- . . . with invoices in excess of a certain total?
- . . . with a new voucher over 'x' dollars?
- . . . who was just added to your ERP system?

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

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

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

- . . . a PO is waiting 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 received 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 has changed?
- . . . there's a large variance between quantity ordered & received?
- . . . a PO's shipping address has been overridden . . .

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

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

Sales Orders: *"If only we had known . . . "*

- . . . that an urgent order had been placed . . .
- . . . the shipment was going to be delayed . . .
- . . . that the backordered line item had been received . . .
- . . . the order's discount was so high . . .
- . . . that the order was missing a key component
- . . . that the client who placed the order had delinquent invoices . . .
- . . . that the client was suddenly buying a lot less than they used to . . .
- . . . the order had been put on credit hold . . .
- . . . that the client had not ordered from us in the past 30 days . . .
- . . . that the profit margin on that order was so low . . .

A smoke detector for your business data

Go to www.alertsandworkflow.com and take the Alerts & Workflow Needs Assessment to see what parts of your organization could most benefit from Sage Alerts & Workflow.