

SAGE ALERTS & WORKFLOW

60 Smoke Signals

Your Sage ERP system needs alerts and workflows.



A Smoke Detector for Your Business Data

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 Sage ERP data. Following are more than 60 examples of places across your organization that could benefit.

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 with 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?
- ... has their credit status changed?



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 ...

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?

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?

