60 Smoke Signals Your ERP Needs Sage Alerts And Workflows

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 . . . "*

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

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

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

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

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

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

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

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

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

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

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

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.