

Sage Alerts & Workflow

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.”

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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.”

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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 Sage Alerts & Workflow solution. The most widely used “Business Activity Monitoring” solution on the market today with over 11,000 customers worldwide, Sage Alerts & Workflow is the “smoke detector for your business data”.