

Alert List

Business Alerts Module

Powered by Info-Alert

AccountMate 8 for SQL and Express

Module	Summary Description	Detailed Description
AR	Customers Due Credit Hold Based On Open Invoices	<ul style="list-style-type: none"> This alert will check open AR invoices for selected customers with invoice amounts over X days and greater than Y dollars. An alert will be produced for any customer meeting this criteria. This alert can be used to keep track of various customers or groups of customers to determine if they should be placed on credit hold.
AR	Customers Due For Credit Hold—No Pending Orders	<ul style="list-style-type: none"> This alert will check current posted balances for selected customers to identify anyone with assigned credits limits and amounts due over that credit limit. Customers with a credit limit of "0" are not considered. This alert does not take into consideration any Pending Sales Orders. Please use alert "Customers Due For Credit Hold—With Pending Orders" in place of this alert if you want open orders considered. An alert will be produced for any customer meeting this criteria who is not currently on credit hold. This alert can be used to keep track of various customers or groups of customers to determine if they should be placed on credit hold.
AR	Customers Due For Credit Hold—With Pending Orders	<ul style="list-style-type: none"> This alert will check current posted balances for selected customers to identify anyone with assigned credits limits and amounts due over that credit limit. Customers with a credit limit of "0" are not included. This alert takes into consideration any Pending Sales Orders. Please use alert "Customers Due For Credit Hold—No Pending Orders" in place of this alert if you do not want open orders considered. An alert will be produced for any customer meeting this criteria who is not currently on credit hold. This alert can be used to keep track of various customers or groups of customers to determine if they should be placed on credit hold.
AR	Print Invoice Form	<ul style="list-style-type: none"> Print Invoices using template. It is assumed that invoice numbers have already been assigned to the orders. This alert will print for verified orders, invoiced orders and credit memos. In each case invoices will only be sent for orders that have an invoice number assigned.
IC	Items Below Reorder Point—Without On Order	<ul style="list-style-type: none"> This alert will look at each selected item to identify if an alert condition exists. Available quantity is calculated as On Hand Qty less Booked Qty. Qty below order point is the difference between the reorder point and Available Qty.
IC	Items Below Reorder—With On Order Amount	<ul style="list-style-type: none"> This alert will look at each selected item to identify if an alert condition exists. Available quantity is calculated as On Hand Qty less Booked Qty. Qty below order point is the difference between the reorder point and (the sum of Available Qty + On Order Qty).
IC	Items Below Safety Stock Level—No On Order Amount	<ul style="list-style-type: none"> This alert will look at each selected item to identify if an alert condition exists. Available Qty is calculated as On-hand Qty less Booked Qty. Qty below safety stock is calculated as the difference between Safety Stock and Available Qty.

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IC	Items Below Safety Stock Level—With On Order	<ul style="list-style-type: none"> This alert will look at each selected item to identify if an alert condition exists. Available Qty is calculated as On-hand Qty less Booked Qty. Qty below safety stock is calculated as the difference between Safety Stock and (the sum of Available Qty + on order Qty).
IC	Items With Available Quantity Less Than [x]	<ul style="list-style-type: none"> This alert will check all selected items and produce an alert condition when the items available quantity drops below a user defined amount. Available quantity for this alert is defined as On Hand Qty - Booked Qty. This alert could be used for any items that you want to take action on once they reach a certain available quantity. There is another alert available if you wish to alert once it drops below a minimum. This alert could be used to indicate active items at or below zero quantity no matter what the minimum reorder quantity is.
IC	Inventory Items With On-Hand Qty Less Than [x]	<ul style="list-style-type: none"> Quantity drops below a user defined amount. On-Hand quantity for this alert does not include any amounts On Order, Committed, or In Use. You would normally use this alert with criteria set up to exclude inactive items. This alert could be used to check for possible inventory errors especially if set to alert for "-" quantities. Having a timely alert under this scenario should enable quicker resolution to these types of errors as opposed to discovering the problem weeks or months later. This alert could be used to indicate active items or below zero quantity no matter what the minimum reorder quantity is. (Perhaps used for special order items.)
MA	Mfg—Productions Order Past Est. Completion Date	<ul style="list-style-type: none"> This alert will check for any production order that does not have a complete status and is past the estimated completion date.
MA	Work Orders in Process for Over [x] Days	<ul style="list-style-type: none"> This alert will check all open Work Orders for selected items and produce an alert for any orders older than the indicated days. This will help keep your inventory levels accurate by making sure that products produced are recorded in an appropriate time frame.
PO	Open PO Over [x] Days Past Requested Date	<ul style="list-style-type: none"> This alert will check all open purchase orders for selected vendors and produce an alert for any orders with a Requested Date more than the indicated days. This will help to identify orders that were placed and not received in full. If an order is open beyond the time its expected to be closed it could indicate a problem with your vendors shipping, or perhaps product was received and not received into the system.
PO	Vendor Balances in Excess of [x]	<ul style="list-style-type: none"> This alert will identify any vendors with a balance due greater than the selected alert amount.
PR	Employees Celebrating Anniversary Dates	<ul style="list-style-type: none"> This alert identifies the employees who have completed another anniversary (based on their hire date). This should cover all employees who have no termination date. This alert can be used to identify which employees are to be assigned a different Paid Leave tier so that they will start accruing longer paid leave hours.
PR	Employees [x] to [y] Days Past Hire Date	<ul style="list-style-type: none"> This alert will identify any active employees who have been with the company at least X days and not more than Y days. Any employee with no termination date and a start date will be considered. You can use this alert to let you know when a new employee's benefits are about to start. You can also set up a sequence to notify you when an employee review is due.

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PR	Employees [x] to [y] Days Past Termination Date	<ul style="list-style-type: none"> This alert will identify when an employee has been terminated for more than X days but not more than Y days. You can use this alert to let you know when an employee has recently been terminated. There are certain actions that need to be taken within a certain amount of time after Termination. This may be beneficial to monitor when an employees COBRA insurance eligibility has expired.
PR	Upcoming Employee Birthdays	<ul style="list-style-type: none"> This alert will identify any active employee's birthday. Any employee with no termination date and a start date will be considered. You can use this alert to let you know when a new employee's benefits are about to start.
PR	Upcoming Employee Reviews	<ul style="list-style-type: none"> This alert will notify you of a scheduled employee review date. You can assign any number of days prior to the review date that you wish to be notified. This can be used as a reminder to give you a few days prior to a review to prepare.
RA	Inventory In Defective Status Past Request Date	<ul style="list-style-type: none"> This alert will check for items that have defective units past their Request Dates. This will help detect any delays in the repair process or facilitate clean up of defective inventory records.
SM	Alert On System Error Messages	<ul style="list-style-type: none"> This alert will check for any records generated in the AccountMate Error log for the current date.
SO	Customer Orders Open [x] Days	<ul style="list-style-type: none"> This alert will check all open orders for selected customers and produce an alert for any orders older than the indicated days. This will help to prevent orders that were placed and not filled quickly, from being ignored. If an order or backorder is open for too long you may want to contact the customer to set expectations and/or verify if the order should still be filled.
SO	Customer Orders [x] to [y] Days Past Order Date	<ul style="list-style-type: none"> This alert will list all orders with their order date more than X number of days, but not more than Y number of days. Typical Use would be if you would like to notify anyone of all orders that are a week old but not to include older orders beyond a week that may be in the system for some specific reason. Another use would be to notify anyone of all "new" orders added whereby the number of days would be "more than 0, but not more than 1". This example would be under the assumption that your orders typically would stay in the system for more than one day.
SO	Customer Quotes Open Over [x] Days	<ul style="list-style-type: none"> This alert will check all open quotations for selected customers and produce an alert for any quotes older than the indicated days. This will allow you to produce timely customer calls to follow up on sales opportunities. It will also allow you to keep your pending quotes file clean.
SO	Customers with Invoices [x] Days Past Invoice Date	<ul style="list-style-type: none"> This alert will check your A/R aging for selected customers to determine if any invoices are greater than a selected number of days old. This will help verify that collection calls are being made and invoices are not being allowed to age for too long.

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SO	Customers without sales activity for [x] days	<ul style="list-style-type: none"> This alert will check recent sales information for all selected customers. An alert will be produced if a customer has not purchased anything in the indicated time frame. Normally once alerted you would contact your customer to identify why they have not purchased recently. Are they buying from a competitor? Did they have a bad experience with your firm? Or perhaps there are other reasons that might allow you to increase sales once identified.
SO	First Time Customer Orders	<ul style="list-style-type: none"> This alert will check for a customer's first sale. Other than notification, as you acquire new customers you may want to send a welcome letter or other promotion to first time buyers.
SO	Invoiced Orders Shipped Past [x] Days	<ul style="list-style-type: none"> This alert will check history for all invoiced orders for the current month and determine the days it took to ship the orders. If the ship days are more than the specified number of days an alert will be generated. This information should be used to help increase customer service by shipping orders more quickly.
SO	New Order Acknowledgement—Detail	<ul style="list-style-type: none"> This alert can be used to send a detailed email or fax to a customer, sales rep, manager, etc. to acknowledge receipt of a new Sales Order. Line items ordered are shown on this alert. Use the summary Order Acknowledgement alert for a streamlined version of this alert.
SO	New Sales Order Acknowledgement	<ul style="list-style-type: none"> This alert can be used to send a summary email to a customer, sales rep, manager, etc. to acknowledge receipt of a new Sales Order. Orders with an Order Date of today will be considered.
SO	Open SO Recommended for Shipment	<ul style="list-style-type: none"> This alert will notify you when orders are ready to ship based on inventory quantity on hand.
SO	Open SO with Gross Profit Under [x%]	<ul style="list-style-type: none"> This alert will check open orders to identify any for a selected range of customers where the profit margin is less than a selected percent. Use this alert to identify possible problems with pricing.

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