

**Info-Alert
Alert Listing**

Data Map: OSAS80

Category: Acct. Rcv

| Alert ID | Category | Alert Description | Last Auto | Active | Hide |
|----------|-----------|---|-----------|--------|-------|
| IO0001 | Acct. Rcv | <p>Customers who have not purchased in X days.</p> <p>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.</p> <p>Normally once alerted you would contact your customer to identify why they have not purchased recently.</p> <p>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</p> | 1/1/1970 | False | False |
| IO0006 | Acct. Rcv | <p>Alert if daily invoiced sales drop below X.</p> <p>An alert will be produced if the sales amount for today drops below a given amount.</p> <p>Credits are not included in the sales figure that is checked.</p> <p>This alert would normally be used to be keep track of daily sales activity, either in total or for an individual rep or customer group. If an abnormal figure is produced additional inquires of your staff could be warranted.</p> | 1/1/1970 | False | False |
| IO0008 | Acct. Rcv | <p>Customers who have ordered, first time this month.</p> <p>This alert will check a customer's first sales date, if available, to determine if this was a first time sale for the month.</p> <p>Other than notification, as you aquire new customers you may want to send a welcome letter or other promotion to first time buyers.</p> | 1/1/1970 | False | False |
| IO0010 | Acct. Rcv | <p>If invoiced sales for a rep exceeds X this month.</p> <p>This alert will check invoiced sales amounts for selected sales reps during the current month and determine if it has exceeded the amount given.</p> <p>An alert will be produced for any rep who has sales that are greater than a selected amount this month.</p> | 1/1/1970 | False | False |
| IO0011 | Acct. Rcv | <p>If total credits exceed a given amount this month.</p> <p>This alert will check history for all credits issued during the current month and determine if they exceed the amount given.</p> <p>If the amount of credits exceed a selected dollar amount over the past month an alert will be generated.</p> <p>This information could indicate faulty manufacturing, defective materials, poor customer expectations set in the sales process, etc.</p> | 1/1/1970 | False | False |
| IO0012 | Acct. Rcv | <p>Customers who have open AR invoices over X days.</p> <p>This alert will check your A/R aging file for selected customers to determine if any invoices are greater than a selected number of days old.</p> <p>This will help verify that collection calls are being made and invoices are not being allowed to age for too long.</p> | 1/1/1970 | False | False |

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|--------|-----------|--|----------|-------|-------|
| IO0029 | Acct. Rcv | Orders that took > X days to ship this Month. This alert will check sales history for all invoiced orders for the current month and determine the days it took to ship the orders. If the ship days is 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. | 1/1/1970 | False | False |
|--------|-----------|--|----------|-------|-------|

Category: GL

| Alert ID | Category | Alert Description | Last Auto | Active | Hide |
|----------|----------|---|-----------|--------|-------|
| IO0067 | GL | GL Expense Accounts 90% or more of Budget Amount General Ledger accounts with an expense account type will be checked to see if the actual amount is within x % of the budget amount. Note: This is currently only for Calendar Year reporting. | 1/1/1970 | False | False |

Category: Inventory

| Alert ID | Category | Alert Description | Last Auto | Active | Hide |
|----------|-----------|---|-----------|--------|-------|
| IO0038 | Inventory | IN Items Below Safety Stock - With On Order This alert will look at each selected item to identify if an alert condition exists. For each Item / Location combination it will take the on hand qty plus any amount on order less qty committed less qty in use then compare that number to the safety stock qty. If that number is below the safety stock an alert will be generated. Note: If an items safety stock qty is set to zero this alert will assume the field is not being used and an alert will not be generated. | 1/1/1970 | False | False |
| IO0039 | Inventory | IN Items Below Safety Stock - Without On Order This alert will look at each selected item to identify if an alert condition exists. For each Item / Location combination it will take the on hand qty less qty committed less qty in use then compare that number to the safety stock qty. If that number is below the safety stock an alert will be generated. Note: If an items safety stock qty is set to zero this alert will assume the safety stock is not being used and an alert will not be generated. | 1/1/1970 | False | False |
| IO0040 | Inventory | Inventory Items With Available Qty Less Than X 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 - On Hand + On Order - Committed - In Use. You would normally use this alert with criteria set up to exclude inactive items. 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. (Perhaps used for special order items). | 1/1/1970 | False | False |

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|--------|-----------|--|----------|-------|-------|
| IO0055 | Inventory | IN Items Below Order Point - With On Order This alert will look at each selected item to identify if an alert condition exists. For each Item / Location combination it will take the on hand qty plus any amount on order less qty committed less qty in use then compare that number to the Order Point Quantity. If that number is below the Order Point an alert will be generated. Note: If an items Order Point is set to zero this alert will assume the field is not being used and an alert will not be generated. | 1/1/1970 | False | False |
| IO0056 | Inventory | IN Items Below Order Point - No On Order This alert will look at each selected item to identify if an alert condition exists. For each Item / Location combination it will take the on hand qty less qty committed less qty in use then compare that number to the Order Point. If that number is below the Order Point an alert will be generated. Note: If an items Order Point is set to zero this alert will assume the Order Point is not being used and an alert will not be generated. | 1/1/1970 | False | False |
| IO0058 | Inventory | Item Total Sold Last Mth +or- x % from prior Mth This alert will identify any Item where sales quantity last month have increased or decreased more than x % from the month prior. The alert will use the invoice date from history to determine the month all sales fall in. In order to compare a full months sales the alert will always use last month as the base month then look at the month prior to compare. This alert looks at Item Quantity sold vs. sales dollars. This is a usefull way to identify when certain Items have not been moving as fast as normal. An item promotion may be in order or an evaluation of additional purchases for the future. | 1/1/1970 | False | False |
| IO0060 | Inventory | Item \$ Sold Last mth +or- x % from the prior mth This alert will identify any Item where sales dollars last month have increased or decreased more than x % from the month prior. The alert will use the invoice date from history to determine the month all sales fall in. In order to compare a full months sales the alert will always use last month as the base month then look at the month prior to compare. This alert looks at Item sales dollars vs. quantity sold. This is a usefull way to identify when certain Items have not been moving as fast as normal. An item promotion may be in order or an evaluation of additional purchases for the future. | 1/1/1970 | False | False |

Category: Jobs

| Alert ID | Category | Alert Description | Last Auto | Active | Hide |
|----------|----------|--|-----------|--------|-------|
| IO0064 | Jobs | Jobs with unbilled costs due to be invoiced This alert will let you know if any jobs have unbilled costs and have not been invoiced in x days. Use this alert to make sure invoices are generated on a timely basis to increase cash flow. | 1/1/1970 | False | False |

Category: Payroll

| Alert ID | Category | Alert Description | Last Auto | Active | Hide |
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|----------|----------|-------------------|-----------|--------|------|

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|--------|---------|---|----------|-------|-------|
| IO0044 | Payroll | Employees who are X days past their hire date This alert will identify any active employees who have been with the company at least X days and no more than X days. You can use this alert to let you know when a new employees benefits are about to start. You can also set up a sequence to notify you when an employee review is due. | 1/1/1970 | False | False |
| IO0045 | Payroll | Employees who are X days past their Term date This alert will identify when an employee has been terminated for more than X days but not more than X 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. | 1/1/1970 | False | False |
| IO0046 | Payroll | Alert X days prior to an employees birthday This alert will notify you of an upcoming employee birthday. You can assign the number of days prior to the birthday that you wish to be notified. This is a useful alert for companies that acknowledge employee's birthdays and do not wish to manually review calendars. | 1/1/1970 | False | False |
| IO0047 | Payroll | Alert X days prior to an employee next review date 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. | 1/1/1970 | False | False |

Category: Purchases

| Alert ID | Category | Alert Description | Last Auto | Active | Hide |
|----------|-----------|--|-----------|--------|-------|
| IO0042 | Purchases | Open Purchase Orders X days past Req Ship Date. This alert will check all open purchase orders for selected vendors and produce an alert for any orders with a Requested Ship 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 entered into the system. | 1/1/1970 | False | False |

Category: Sales

| Alert ID | Category | Alert Description | Last Auto | Active | Hide |
|----------|----------|--|-----------|--------|-------|
| IO0003 | Sales | Check for Open Sales Orders older than X days. 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. | 1/1/1970 | False | False |

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| IO0004 | Sales | <p>Check for Open Quotes older than X days.</p> <p>This alert will check all open quotations for selected customers and produce an alert for any quotes older than the indicated days.</p> <p>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.</p> | 1/1/1970 | False | False |
| IO0007 | Sales | <p>Open orders with gross profit margin less than X%.</p> <p>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.</p> <p>Use this alert to identify possible problems with pricing.</p> | 3/25/2015 | True | False |
| IO0028 | Sales | <p>Average days to ship orders by customer this month</p> <p>This alert will check sales history for selected customers and determine the average days it took to ship their orders for the current month.</p> <p>A summary report will be produced indicating the average number of days from order date to ship date for selected customers.</p> <p>This information should be used to help increase customer service by shipping orders more quickly.</p> | 1/1/1970 | False | False |
| IO0041 | Sales | <p>Orders w/Order Date between X and X days old</p> <p>This alert will list all orders with their order date more than X number of days, but not more than X number of days.</p> <p>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.</p> <p>This example would be under the assumption that your orders typically would stay in the system for more than one day.</p> | 1/1/1970 | False | False |
| IO0052 | Sales | <p>Orders w/Req Ship Date between X and X days old</p> <p>This alert will list all orders with their Req date more than X number of days, but not more than X number of days.</p> <p>Typical use would be if you would like to notify anyone of all orders that are one week past the Req Ship Date but not to include older orders beyond one week past the Req Ship Date that may be in the system for some specific reason.</p> <p>This example would be under the assumption that your orders typically would stay in the system for more than one day.</p> | 1/1/1970 | False | False |
| IO0054 | Sales | <p>If the value of pending sales orders drops below x</p> <p>This alert will check all pending sales orders for the selected criteria and alert you if the sales value has dropped below a given amount.</p> <p>This alert is helpful for environments where sales orders are placed well in advance of shipments and invoicing so the first indication of a reduction in overall sales is in the quantity, (or value), of existing sales orders placed.</p> <p>If total orders at any given time are less than normal you can expect less than normal revenue for a future period. This alert allows you to take action now to address the future reduction in revenue, ie increase sales or reduce expenses.</p> | 1/1/1970 | False | False |

Friday, March 27, 2015
8:54 AM

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|--------|-------|--------------------------------|----------|-------|-------|
| IO0075 | Sales | Print Invoice from Sales Order | 1/1/1970 | False | False |
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Print Invoices using template. It is assumed that invoice numbers have already been assigned to the orders. This alert will print for transactions with a status of Credit, Invoiced and Verified.

Transactions must have an Invoice Number assigned.

End of Report
