

Info-Alert

Automated functions for OSAS and TRAVERSE keeping your business alert!

- Automatically identify issues before they become problems
- Catch data entry errors while there is still time to correct them
- Find exceptions in your data that you should know about
- Automatically send late notices, acknowledgements, ship notices, and more
- Update CRM systems or other databases with alert information
- Increase productivity without working harder

	Description Sc			Snapshot		
<u>M</u> ap II	Sample		Active Only			
Se	Map ID 🖃	Alert 🖃 🖃	Category 🖃	Description ==	Snap	*
▶□	Sample	100007	Sales	Open orders with gross profit margin less than X%.		
	Sample	100008	Sales	Customers who have ordered for the first time.		
	Sample	100010	Sales	If invoiced sales for a rep exceeds X this month.		
	Sample	I00011	Sales	If total credits exceed a given amount this month.		
	Sample	100012	AR.	Customers who have open AR invoices over X days.		
	Sample	100020	Inventory	Automatic Sales Order Release Recommendations		
	Sample	100028	Sales	Average days to ship orders by customer this month		
	Sample	100029	Sales	Orders that took > X days to ship this Month.		-

Put Info-Alert to work quickly by selecting from pre-defined alerts and actions. Simply set criteria and schedule events to run as needed. Set various notification options, output to fax, email, or report.

Alerts

Info-Alert scans your data looking for conditions or criteria you have asked it to look for such as purchases that have not been received, orders with a low gross margin, important items that need to be reordered, and so on. When data matches your criteria, you will be alerted by email, fax, or printed report.

Actions

Info-Alert can automatically send dunning messages, order acknowledgements, invoices, and other customer related messages that you configure. It can also request status of late shipments from your vendors, request product quotes and perform other actions you require.

Events

Events can be configured to create and send files as email attachments, update customer credit hold flags, move suspect orders to another batch, update CRM data, and perform other unattended functions.



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Alert Examples

- Customers with open A/R invoices over x days
- Open orders older than x days
- Open purchase orders that have not been received
- Customers over their credit limit
- Orders with a gross margin less than x
- Items below their order point
- Employees x days past their hire date
- Customers who have not purchased in x days
- GL accounts within x% of budget

Action Examples

- Send electronic invoices
- Email or fax customer dunning notices
- Send order acknowledgements
- Request P/O delivery status from vendors
- Check order entry to verify margins
- Put customers on credit hold when over limit
- Generate and email Excel sheets

	en Map: Sample Alert: 100001				
	Alerts Description Sche	dule <u>C</u> riteria/Notify Actions Snapshot			
<i>Use the schedule function to let</i> Info-Alert know how often each alert should be reviewed.	Schedule Frequency — © Daily © Weekly © Monthly © One Time Only	Daily Monthly © Every Day © Day of Month © Weekdays C First Day of Month © Last Day of Month Weekdy	Date Start Date Stop Date Do not re-notify		
	C Always		Note: 0 in less than will always		
			re-notify 2 Week(s)		
W Sample, 100001 - Group:	- • •	D6:00 PM (Example 06:30 AM)			
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Event ID Event Description					
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12	12/1	1009 \$673.99 15/2009 \$405.54			
5		06/2009 \$631.30			
Enter an unlimited number of email or		(T) \$1,710.83			
	ply to this email by clicking the follo s you might have.	owing link accounting@SampleComp.com or call our office @ (714	4) 555-5555 with any		
	n also check your account status on our website at <u>www.SampleComp.com</u> .				
Jim Willia	ams		-		

Use actions and events to create files, update data and configure output to vendors and customers.

Optional Tool Kit

Connect Info-Alert with other databases and spreadsheets to generate custom alerts and actions with the optional Tool Kit. You can also use the Tool Kit to create new alerts or to edit existing alert logic.

