

Sage Alerts & Workflow

Pre-Configured Events for Sage 300 Construction Alerts & Workflow

Sage 300 Construction Alerts & Workflow comes with an extensive collection of pre-configured Alert Events and Alert Condition "Triggers". The following list is of the pre-configured Triggers; note that wherever a trigger refers to a variable (i.e., an 'x' or 'y'), the Trigger will allow you to specify the exact Trigger Threshold that you want Alerts & Workflow to monitor for.

Users of Alerts & Workflow Enterprise Edition will be able not only to use any of the following Triggers, but will also be able to customize these Triggers and create an unlimited number of additional Triggers in the Alerts & Workflow application.

Customer (& A/R) Triggers:

AR; Customers; Credit Limit Has Changed
AR; Customers; Credit Rating Has Changed
AR; Customers; Credit Rating Has Changed to 'x'
AR; Customers; Outstanding A/R Balance > Credit Limit
AR; Customers; Used Up > 'x' Percent of Credit Limit
AR; Customers; 31 - 60 Day Balance > 'x'
AR; Customers; 61 - 90 Day Balance > 'x'
AR; Customers; 91 - 120 Day Balance > 'x'
AR; Customers; Current Balance > 'x'
AR; Customers; Future Aging Balance <> '0'
AR; Customers; Last Aging > 'x' Days Ago
AR; Customers; Last Payment Was > 'x' Days Ago (Bal > '0')
AR; Customers; Over 120 Day Balance > 'x'
AR; Customers; Total Outstanding Amount > 'x'

Accounts Payable Triggers:

AP; Invoices; Count; Open Per Vendor > 'x'
AP; Invoices; Created Today for > 'x' Dollars
AP; Invoices; Discount Date is Today
AP; Invoices; Discount Date is Within 'x' Days
AP; Invoices; Due Back Within 'x' Days
AP; Invoices; On Hold
AP; Invoices; Open
AP; Invoices; Payment Due Within 'x' Days
AP; Invoices; Status Has Changed to "Fully Paid"
AP; Invoices; Total; Open Dollars Per Vendor > 'x'
AP; Vendors; Outstanding Amount > 'x'
AP; Vendors; Placed on Credit Hold

(Support-Related) Issue Triggers:

Issues; Count; More Than 'x' New with Urgency 'y'
Issues; Count; More Than 'x' Open with Urgency 'y'
Issues; Due Date is Today

Issues; Due Within 'x' Days
Issues; Have Been Closed
Issues; New

Job Triggers:

Jobs; Completed Earlier Than Estimated
Jobs; Completed Today
Jobs; On Hold
Jobs; Past Estimated Start Date & Unstarted
Jobs; Revised Completion Date Has Changed
Jobs; Scheduled to Start in 'x' Days
Jobs; Starting on a Date Other Than Estimated
Jobs; Status Has Changed

A Note About Trigger Design:

Although referred to as “Triggers”, these event conditions are designed using a wizard-driven “Query Design Module” and require no technical expertise or programming skill to create. As long as you have access to information about an application’s database schema (which tells you what data is stored within which tables in an application), you have all the knowledge required for the creation of Alerts & Workflow queries.

If additional assistance is required in the creation of Alerts & Workflow queries (triggers) or events, please contact your Sage Business Partner or Alerts & Workflow Partner Services.