

Sage Alerts & Workflow

Pre-Configured Events for Sage 300 ERP

Sage 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 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.

Accounts Receivable Triggers:

Clients; New
Balance Due < 0 (Credit Balance)
Balance Due > 'x'
Balance Due > 'x' and No Payments Received
Chart; Count Overdue Per Rep
Chart; Due Per Rep
Count; Overdue Per Client
Credit Limit Has Changed
Credit Used > 'x' Percent
Invoices due in < 'x' days
Invoices overdue
Invoices overdue > 'x' days
Last Activity > 'x' Days
Last Invoice > 'x' Days
Last Payment > 'x' Days
Past Due > 'x'
Payment Terms Have Changed
Primary Sales Rep Has Changed
Status Change
Total Due per Rep/Client

Sales Order Triggers:

Chart; Count Orders Per Rep
Chart; Total Order Value Per Rep
Discount Percent > 'x'
Expected Ship < 'x' Days
Gross Profit < 'x' Percent
Gross Profit > 'x' Percent
On Back Order
Price Override
More than 'x' of Item 'y' Ordered
Discount Amount > 'x'
Expected Ship Not Shipped Today

Inventory Control Triggers:

Base Price Has Changed
Items Activated Today
Items Inactivated Today
New Cost > 'x'% Increase vs Standard
No Receipt > 'x' Days
No Ship > 'x' Days
Qty On Hand + On Order > 'x'
Qty On Hand - Qty On Sales Order < 'x'
Qty On Hand > 'x'
Qty On Hand < 'x'
Qty On Offset > 'x'
Qty On Order > 'x'
Qty On Sales Order > 'x'
Recent Cost < Standard Cost
Recent Cost > Standard Cost
Sale Begins in 'x' Days
Sale Ends in 'x' Days
Standard Cost Change

Sales Order Triggers Continued:

Expected Ship < 'x' Days
Expected Ship Changed
Hold Status Changed
Multiple Sales Reps
New Orders
New Orders > 'x' Amount
Orders on Hold
Over Credit Limit
Shipped Today
Total Amount by Client > 'x'
Total Amount by Rep < 'x'
Total Amount by Rep > 'x'

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Accounts Payable Triggers:

Chart; Total Due per Vendor
Discount Expires in 'x' Days
Due Date Change
Due in 'x' Days
New Invoice > 'x'
Overdue Invoices
Overdue Invoice Count per Vendor
Overdue Total per Vendor
Invoices Paid Today
Invoices Posted Today
Average Days to Pay > 'x'
Balance Due > 'x'
Email Address Changed
New Vendor Added
Vendors with No Email Address
Change to Terms

Purchase Order Triggers

Chart; PO Count per Vendor
Chart: PO Total per Vendor
Completed Today
Lines: Expected Arrive < 'x' Days
Qty Cancel > 'x'
Qty Ordered > 'x'
Qty Ordered > 'x' on Item 'y'

Purchase Order Triggers Continued

Qty Outstanding > 'x'
Qty Received < Ordered
PO: Arriving < 'x' Days
Discount Amount > 'x'
Discount Percentage > 'x'
New PO
PO on Hold
PO Received Today

DashBoards (Webcasts)

Clients; Balance Due > 'x'
Clients; Balance Due > 'x' (by Rep)
Clients; Past Due > 'x'; No Payments
Clients; Past Due > 'x'; No Payments (by Rep)
Items; On Hand + On Order > 'x'
Items; On Hand - On Sales Order < 'x'
Items; On Hand > 'x'
Items; Recent Cost > 'x' Percent
Orders; Hold Status Change
Orders; Line on Back Order
Orders; On Hold
Orders; Placed Today
Orders; Qty Order per Item
Orders; Shipping < 'x' Days
Orders; Total by Rep

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.

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