

# Alerting and Workflow

## Pre-Configured Events for Sage 100 ERP

Sage Alerts & Workflow comes with an extensive collection of pre-configured Alert Events and Alert Condition "Triggers" for Sage 100 ERP. 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 Receivables Triggers

Accounts; Balance Forward > 'x'  
 Accounts; Balance Over 120 Days > 'x'  
 Accounts; Balance Over 30 Days > 'x'  
 Accounts; Balance Over 60 Days > 'x'  
 Accounts; Balance Over 90 Days > 'x'  
 Accounts; Count of the Number of Accts Whose Over 120 Day Bal > 'y'  
 Accounts; Count of the Number of Accts Whose Total Bal is > 'y'  
 Accounts; Current Balance + Bal Forward + Open Orders is > Credit Limit  
 Accounts; Current Balance + Bal Forward + Open Orders is > 'x'  
 Accounts; Current Balance + Bal Forward > 'x' Percent of Credit Limit  
 Accounts; Current Balance + Balance Forward > Credit Limit  
 Accounts; Current Balance + Open Orders are > 'x'  
 Accounts; Current Balance is > 'x'  
 Accounts; Open Order Amount is Greater Than 'x'

### Accounts Receivables Invoice Triggers

AR; Open Invoices; Commission Amount > 'x'  
 AR; Open Invoices; Cost of Sales > Sales Amount  
 AR; Open Invoices; Count of Invoices of > 'y' Dollars Per Customer  
 AR; Open Invoices; Due In 'x' Days  
 AR; Open Invoices; Due Today  
 AR; Open Invoices; Overdue for Payment  
 AR; Open Invoices; Overdue for Payment; Unpaid Balance > 'x'  
 AR; Open Invoices; Total Due Per Customer  
 AR; Open Invoices; Total Due Within 'y' Days  
 AR; Open Invoices; Total Salesrep Commissions  
 AR; Open Invoices; Unpaid Balance > 'x'

### Client Account Triggers

Accounts; Credit Limit is Changed  
 Accounts; Credit Status Changed  
 Accounts; No Activity Within 'x' Days  
 Accounts; On Credit Hold  
 Contacts; New  
 Customers; All

## Chortek Profile

### Business Technology Consulting

Chortek LLP has been helping businesses manage their technology investments for close to 20 years. Our suite of offerings includes customer relationship management (CRM), Sage, and Job Ops software solutions.

We also assist businesses in managing their network services, security and remote access, disaster preparedness, and server deployment. Our team of professionals serves customers throughout the Midwest and across the country. Our Support Desk team includes Microsoft Certified System Engineers and our ERP software implementation team includes CPAs and Microsoft Certified System Engineers.

## Certifications

- Microsoft Certified Solutions Expert (MCSE)
- Microsoft Certified Technology Specialist (MCTS)
- Certified Information Systems Security Professional (CISSP)

## Locations

- Waukesha, WI
- Appleton, WI

(continued from front)

### Accounts Payables Invoice Triggers

AP; Open Invoices; Count of the Number of Unpaid Invoices Per Vendor  
AP; Open Invoices; Due In 'x' Days  
AP; Open Invoices; Due Today  
AP; Open Invoices; On Payment Hold  
AP; Open Invoices; Overdue for Payment  
AP; Open Invoices; Total Balance Due In 'x' Days  
AP; Open Invoices; Total Balance Overdue Per Vendor  
AP; Open Invoices; Total Balance Per Vendor  
AP; Open Invoices; Unpaid Balance > 'x'

### Accounts Payables Vendor Triggers

Vendors; Balance Due is > 'x'  
Vendors; On Payment Hold  
Inventory Stock Level Triggers:  
IC; Item Warehouse; > 'x' Units on Backorder  
IC; Item Warehouse; Item is At or Below Reorder Point  
IC; Item Warehouse; Negative Quantity On Hand  
IC; Item Warehouse; Qty Available < Qty Needed  
IC; Item Warehouse; Qty On Hand + On Order < Min Stock Level  
IC; Item Warehouse; Stock Surplus (On Hand > Max Qty)  
IC; Item Warehouse; Total Units On Hand (All Warehouses)

### Inventory Item Master Triggers

IM; Items; Last Cost < Average Cost  
IM; Items; Last Cost > 'x' Percent Increase Over Avg Cost  
IM; Items; Not Sold Within the Last 'x' Days  
IM; Items; Primary Vendor is Changed  
IM; Items; Profit Margin is < 'x' Percent  
IM; Items; Profit Margin is > 'x' Percent  
IM; Items; Sale Ends Within the Next 'x' Days  
IM; Items; Sale Starts or Ends Today  
IM; Items; Sale Starts Within the Next 'x' Days  
IM; Items; Suggested Retail Price is Changed  
IM; Items; Suggested Retail Price List  
IM; Sales Promotion; Starting Today

### 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.

### Purchase Order Line Item Triggers

PO; Line Items Required for Receipt Within 'x' Days  
PO; Line Items; Backordered  
PO; Line Items; Overdue by Required Date  
PO; Line Items; Received Percentage of Items < 'x'

### Purchase Order Triggers

PO; Missing Payment Terms  
PO; On Hold  
PO; Status is Changed  
Sales Order Triggers:  
SO; Daily Item Total (Units) > 'x'  
SO; Sales Orders Confirm To Contact is Changed  
SO; Sales Orders Deposit Amount is Changed  
SO; Sales Orders Discount Amount is Changed  
SO; Sales Orders Placed Today (Order Confirmation)  
SO; Sales Orders Ship Via is Changed  
SO; Sales Orders Terms are Changed