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### Did You Know?

We know you're passionate about your businesses, but did you know that one in six business owners indicate that, if given the choice, they wouldn't do it again? This finding comes from the Sage Software Business Minds Survey, a study of the ups and downs of business life in North America conducted on behalf of Sage Software. The survey explored issues of business confidence, passion for business, pace of change, and external influences.



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## Step Up Your Efficiency Sage MAS 90 Business Alerts

**W**e're all busy and value those tools that allow us to operate more efficiently. The Sage MAS 90 Business Alerts module is designed specifically to assist you in better managing your operational tasks. Let's learn more.

### Solve Common Business Problems

The **Business Alerts** module has the potential to change the way you work. You can take proactive action to ensure processes and procedures run smoothly and that you are alerted to exceptional events. Chances are your employees are already performing some of these tasks manually. This tool allows them to work smarter and let Business Alerts work harder. Here are some common business problems and situations the Business Alerts module easily can address.

#### Don't Run Out

One of the best ways to boost sales and deliver quality service is to ensure you always have sufficient stock on hand to meet your customers' demands. Most customers will shop elsewhere rather than wait for you to replenish. While Sage MAS 90 ERP includes some excellent reports to help make you aware of low stock situations, you must remember to run reports to get that data.

Using Business Alerts, you can set an alert to notify your purchasing agent when the quantity of an item drops below the reorder point. This way, the agent can begin the reorder process and you're more likely to prevent an out-of-stock situation.

Set an Alert to notify your salespeople when the quantity available of your best-selling items falls below a specified amount so they can follow-up on open quotes and close the sale while stock is still ample.

Alert your marketing manager when the Quantity On Order of an item tops a certain number, allowing them to gauge the effectiveness of their marketing efforts.

#### Communication Is Key

Business Alerts can send an email to a customer as an Accounts Receivable or a Sales Order Invoice is created, including the detailed sales order information. Customers will then be expecting the

invoice in the mail, and you just may get paid more quickly.

Use a similar Alert function to email a customer with the tracking number as an order is shipped. Include a link to the carrier's Web site to make it simple for your customer to track their order's shipping information. You're likely to reduce the number of calls to your customer service department.



Business Alerts gives you a better way to track important events and be sure that you take advantage of business opportunities.

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Compliments of:



**COMPUTER  
ACCOUNTING  
SYSTEMS, INC.**

1855 58th Street NE  
Tacoma, WA 98422

(877) 952-6098 toll free  
(253) 952-6206 fax

Email:  
mike.renner@caserv.com

Web Site:  
www.caserv.com

## Business Alerts CONTINUED

When you reward prompt-paying customers with a higher credit limit, Business Alerts automatically can generate an email to congratulate them on their good credit and inform them of their new limit.

Some staff may frequently be away from the office and could miss that change order you printed and placed on their desk. Ensure they're informed by creating an Alert to email team members when a Job Cost Change Order is added or when a Job Status changes. When that email arrives on their hand-held device or when they check email from home, your message will come through loud and clear.

### Company Watchdog

Check fraud is a growing concern for businesses. Help curtail that fraud by using an Alert to the accounting manager and you when an Accounts Payable check is issued that exceeds a specified dollar amount.

Use Business Alerts to watch the company budget. Set up a General Ledger Alert to notify you when an account balance exceeds the budgeted amount.

Business Alerts can help you monitor the Sage MAS 90 database by detecting changes, additions, and deletions of records. You can specify specific files or folders to monitor, and receive an alert notifying you of specific conditions occurring with those files or folders. This can help you identify potential data problems or even inappropriate activities happening within the database.

## Creating And Using Alerts

### How Alerts Work

There are dozens of predefined alerts spanning several modules that you may use as they are or customize to fit your company's needs. Alerts can be both time and date sensitive and you can configure them to include relevant Sage MAS 90 data such as Names, Amounts, and Dates. Whenever an alert runs, it scans the database to determine whether the specific condition that it is looking for exists. If the Alert condition is found, an email notification is sent to the recipients you define.

Alerts are possible within the General Ledger, Accounts Payable, Accounts Receivable, Job Cost, Purchase Order, Inventory, and Sales Order modules.

### Setting Up New Alerts

Setting up a new Alert involves three simple steps: setting alert criteria, selecting notification options, and defining a schedule.

To define your alert criteria, simply select one of the **Standard Alerts** and modify it to suit your specific needs. The alert determines what condition is monitored, such as a check created over a specified amount or a Purchase Order item some number of days late. You define the parameter values for the alert. For example, the standard alert "Notify when a check is created with an amount in excess of {Amount}" consists of the parameter value *Amount*. You must determine what this value will be, for example, \$5,000.00.

The next step is to select the recipients of your alert. You may specify one or more email addresses.

The final step is to schedule your alert. For example, you can set up an alert to run every evening at 8:00 p.m. You can schedule the system to scan for the alert condition on a daily, weekly, or monthly basis. Additional scheduling choices allow you to specify the frequency (for example, once every hour) and duration (starting and ending dates) of the schedule.

## Efficiency Resolution

Use Business Alerts to keep employees and vendors up-to-date for informed decision-making, or to improve customer service by giving your customers personalized attention with each transaction. This module allows your business to respond to rapidly changing business conditions 24 hours a day, 7 days a week.

This year, make a resolution to work smarter and more proactively using Business Alerts. It is like having an organized and proactive assistant on your staff. It will monitor corporate activities and notify you of the events important to you. Call us for a demonstration and see what the Business Alerts module can do for you! ★

## Standard Business Alerts

You can set any of the following Standard Alerts to notify you (or others) whenever the following conditions are met:

### Accounts Payable

- ▶ Check exceeds specified amount.
- ▶ A Discount Amount over a specified amount is due to expire within X number of days.
- ▶ Accounts Payable Invoice exceeds specified amount.
- ▶ Invoices past 90 days due.

### Accounts Receivable

- ▶ A Past-due amount for a customer exceeds the specified amount.
- ▶ A customer has not had any account activity within X number of days.
- ▶ A new invoice is created.
- ▶ New customer welcome.
- ▶ Customer account On Hold.
- ▶ Accounts Receivable Credit Limit change.

### Job Cost

- ▶ Job approaching/exceeding estimate.
- ▶ Job status change.
- ▶ Job change order.

### Purchase Order

- ▶ Returned merchandise.
- ▶ Purchase order approval.
- ▶ Purchase order not received by date.

### Sales Order

- ▶ New sales order invoice is created.
- ▶ Sales order is entered with a Total exceeding specified amount.
- ▶ The Open Order Amount for a customer exceeds specified amount.
- ▶ Sales order package tracking is sent to customers when the order is shipped.
- ▶ An Order is older than X days and has a Total greater than specified amount.

### Inventory

- ▶ The Quantity Available for a given item is less than the reorder level.
- ▶ The On-hand Quantity for an item falls below zero.

### General Ledger

- ▶ Account balance exceeds budgeted amount.
- ▶ Expense transaction exceeds specified dollar amount.
- ▶ New General Ledger account added. ★