



INFO-ALERT

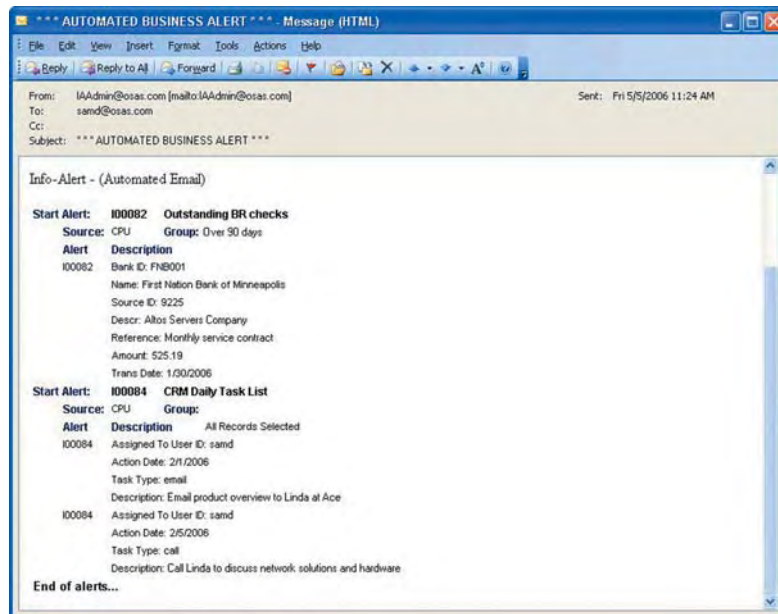
INFO-ALERT

Protecting your profits with up-to-the-minute alerts

Info-Alert is a powerful tool that monitors your business data and provides automated alerts when various business conditions are met. Info-Alert serves as a “virtual employee” that attaches to your TRAVERSE data and reviews it at scheduled intervals, reporting the information to the appropriate people.

With Info-Alert, you define a specific set of parameters. When conditions occur that meet those parameters, an alert is sent—via email or report—to those individuals assigned to receive the notification (employees, customers, vendors, etc.). There are many predefined alerts, including those in categories such as Accounts Receivable, Order Entry, Inventory and Purchasing. For each pre-defined alert, you can establish a set of criteria; for example, “Only review customers assigned to a specific sales rep.”

Info-Alert is quick and easy to install. Once it is set up, Info-Alert will run unattended, reviewing your data for information you have requested. Most other Microsoft or ODBC-compliant databases in your office can easily be connected and mapped to Info-Alert to allow you to generate alerts based on your company specific data. Info-Alert can also be configured to send dunning letters to your customers, send requests to vendors for the status of late shipments, automatically update credit hold flags in your customer record and much more.



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Sample Alerts

Accounts Receivable

- customers who have open AR invoices over X days
- customers due credit hold based on open invoices
- customers due credit hold if over credit limit

Sales Order

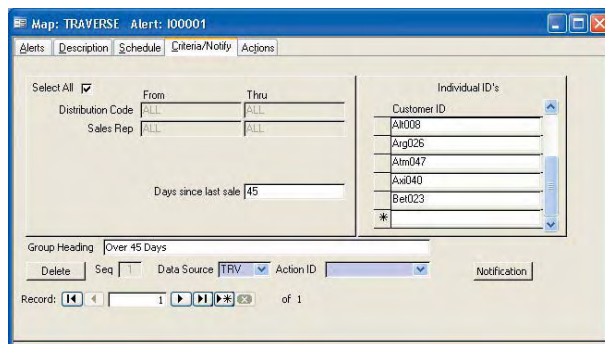
- customers who have not purchased in X days
- check for open sales orders older than X days
- check for open quotes older than X days
- orders that took > X days to ship this month
- average days to ship orders by customer this month
- alert if daily invoiced sales drop below X
- if total credits exceed a given amount this month
- open orders with gross profit margin less than X %
- if invoiced sales for a rep exceeds X this month
- orders with order date between X and X days old
- if the value of pending sales orders drops below X
- customer sales last month + or - X % from prior month

Inventory

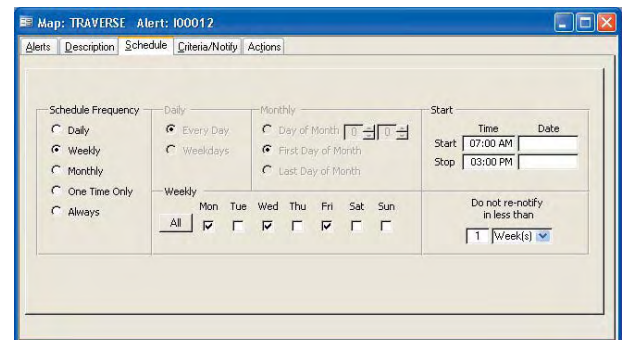
- IN items below min. order quantity
- IN items with available quantity less than X
- IN items below order point
- item quantity sold last month + or - X % from prior month
- automatic sales order release recommendations

Payroll

- employees who are X days past their hire date
- alert X days prior to an employee's birthday
- alert X days prior to an employee's next review date



You can define ranges and groups for alerts.



Schedule each alert to run at various intervals. You can select each day you want the alert to run. You also have the option for the alert to run once daily or multiple times daily.