

Pre-Configured Events for Sage 100

Sage Alerts & Workflow comes with an extensive collection of pre-configured Alert Events and Alert Condition “Triggers” for Sage 100. 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; > 'x' with Balance > 'y'
 Accounts; All
 Accounts; No Activity
 Accounts; On Credit Hold
 Accounts; Order Amount > 'x'
 Balance + Order > Credit Limit
 Balance + Order > 'x'
 Balance + Order > 'x' Percent Credit
 Balance > 120 Days > 'x'
 Balance > 30 Days > 'x'
 Balance > 60 Days > 'x'
 Balance > 90 Days > 'x'
 Balance > Credit Limit
 Balance > 'x'
 Balance Forward > 'x'
 Chart; # Customer Over Credit Limit
 Chart; Customer Balance > 'x'
 Chart; Customer; Overdue > 0
 Chart; Invoices by Month
 Chart; Invoices Due Per Mo/Rep
 Chart; Invoices Due Per Month
 Chart; Overdue Clients Per Rep 'x'
 Chart; Overdue Per Rep
 Commission; Rep Details
 Commission; Rep Summary
 Contacts; New
 Credit Limit Change
 Credit Status Change
 Customers; All
 Invoices; COGS > Order
 Invoices; Count Per Client > 'x'
 Invoices; Due In 'x' Days
 Invoices; Overdue, Balance > 'x'
 Invoices; Total Due < 'y' Days
 Invoices; Total Due Per Client

Bill of Materials:

BOM; Item Availability Q3
 BOM; New
 BOM; Not Updated > 'x' Days
 BOM; SO Total Order Per Item Q2
 BOM; Total Order Per Comp Q1
 BOM; Unused > 'x' Days
 BOM; Yield Percent < 'x'
 Chg Control; Ends < 'x' Days
 Chg Control; New
 Chg Control; No Update > 'x' Days
 Chg Control; Starts < 'x' Days

Inventory Triggers:

Chart; Qty OH (All WHs)
 Chart; Qty OH Negative
 Chart; Top 10 in Surplus
 Chart; Top 10 on BO
 Chart; Top 10 on PO
 Cost > 'x' Percent Increase
 Cost; Last < Avg
 Item List
 Item; Unsold > 'x' Days
 Item; Vendor Change
 Link To; Dup Items
 Link To; Vendor On Hold
 Price Change
 Price List
 Profit Margin < 'x'
 Profit Margin > 'x'
 Promo; Starts Today
 Qty <= ReOrder Point
 Qty > 'x' on BO
 Qty Avail < Needed
 Qty OH (All WH)
 Qty OH + OO < Min
 Qty Surplus

Inventory Triggers (Continued):

Qty; Negative OH
Sale Ends in 'x' Days
Sale Starts in 'x' Days

Accounts Payables Triggers:

Chart; # Invoices Unpaid Per Vendor
Chart; Invoices Due Per Month
Chart; Total Balance Per Vendor
Invoices; Due In 'x' Days
Invoices; Due Today
Invoices; Number Unpaid Per Vendor
Invoices; On Payment Hold
Invoices; Overdue for Payment
Invoices; Total Balance Due In 'x' Days
Invoices; Total Balance Per Vendor
Invoices; Total Overdue Per Vendor
Invoices; Unpaid Balance > 'x'
Invoices; Overdue for Payment
Invoices; Number Unpaid Per Vendor
Invoices; Total Balance Due In 'x' Days
Vendors; Balance Due > 'x'
Vendors; On Payment Hold

Purchase Order Line Item Triggers:

Line Items Required for Receipt Within 'x' Days
Line Items; Back Ordered
Line Items; Overdue by Required Date
Line Items; Received Percentage of Items < 'x'
Missing Payment Terms
On Hold
Status is Changed

Sales Order Triggers:

Customer Order Last Mo
Customer Order This Mo
Monthly Compare
Customer 6 Mo Total
Customer Monthly Avg
Customer Last Mo Sales
Customer Last Mo Vs Avg
Change to Confirm To
Change to Deposit
Change to Discount
Change to Prom Date
Change to Ship Expire
Change to Ship Via
Change to Terms
Chart; # Orders by Day/Item
Chart; # Orders by Rep/Month
Chart; Avg \$ by Item
Chart; Item \$ by Day
Chart; Item \$ Per Month
Chart; Order \$ By Day
Chart; Order \$ By Month
Chart; Order \$ By Year
Chart; Order \$ Per Day/Rep
Chart; Order \$ Per Rep/Month
Customers; All
Orders; Today's
Qty Order by Item

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.