Spotlight - Business Alerts

Preparation

Preparation if using demo data attached:

1. Import Demo Data
2. Login with Standard ID: sample@hansaworld.com; Password: Sample99

Preparation for creating your own demo data:

1. Import Demo Data
2. Login with
   Standard ID: sample@hansaworld.com
   Passworld: Sample99
3. Go to CRM module >> Settings>> Activity Classes and create class APPR - Approvals
4. Go to CRM module >> Settings>> Activity Types and create Activity Types for the following Credit Notes and Purchase Approvals:
   - P1 - Purchase Order approval request
   - P2 - Purchase Order approved
   - P3 - Purchase Order approval rejected
   - P4 - Purchase Order approval canceled
   - CN1 - Credit Note approval request
   - CN2 - Credit Note approved
   - CN3 - Credit Note approval rejected
   - CN4 - Credit Note approval canceled

5. Go to Business Alerts >>Register >>Approval Rules>> on Register field open Paste special and select Sales Credit Note
Then add under Request details >> Activity type select CN1
Under Result details select corresponding activity types for Approved, Rejected, Cancelled
Tick ‘Automatically OK approved records’
In the matrix enter 999999 in the Up To column and add User, AM, By one, Send notification, next level None

6. Same for Purchase Orders

Go to Rules TAB and enter 5000.00 in Up to column and add , user, blank , none , send notification, next level Not required
Second row enter 10,000 in Up to column and add one user AM, One, send notification, Not required
Third row up to 50,000 in Up to column put 50,000, user, AM,KS, by all, send notification, Not required
Press Save

7. Go to Business Alerts>>Settings>>GP below minimum. Show that a percent can be added and select ‘create alert…’ and save. Fill in a Stnd. Text; and make sure Stock>>Settings>>Location has a person filled in on every location in the field ‘Responsible’

Script

Are you looking for functionality to improve your company's internal communications? Would your company benefit from automated alerts for employee and customer tasks? Standard ERP's Business Alerts help you stay on top of your company's important activities and events.

Alerts can be sent via SMS, email and internal messages using the data you already have in your system. Let's look at how it works!

An employee is trying to quote a customer and the discount is so high, it will result in an unprofitable sale. A notification will pop up, the system will stop the sales process, and a supervisor will get an alert to evaluate.

ACTION: Create Quotation with 95% discount and try to save - should get alert "Below min GP" (TIP: Have quote ready in personal desktop so you can quickly open it and try to add 95% discount and save) DRH: due to a bug this is currently not working.

With Business Alerts, you can avoid costly mistakes and automate your approval processes.

When a large purchase order or credit note needs to be processed, for example, and this activity requires an authorized person in the company to approve it, the user receives a message to request approval and the decision maker gets an alert via SMS, email or pop up window.

ACTION: Open a saved PO (not OK'd) above the 5000.00 limit and select OK and Save >> message pops up to request approval. Go to Operations >> Request Approval. Log in as AM and show task requesting approval, point at open record and then select Approve and show DONE and Activity changed to Approved.

Standard ERP's Business Alerts help you stay on top of order deliveries and quotations as well. You can receive alerts minutes, hours, and even days before the event, to any of your devices.

Improve your customers' experience by sending automated notifications to your customers when they place an order or when an order is shipped.

You can also improve your cash flow by sending a gentle reminder about due invoices and send a report to an employee without giving them access to the entire ledger.

You can choose from a range of alerts, - or easily have alerts customized to accommodate unique company needs.

ACTION: Go to Business Alerts>>Settings >> point at Contact Order alert, Contact delivery alert, and Accounts receivable due report then point to Reservations alert and then the rest.

Standard ERP's built in Business Alerts help you track important business processes and facilitate an informed decision making process