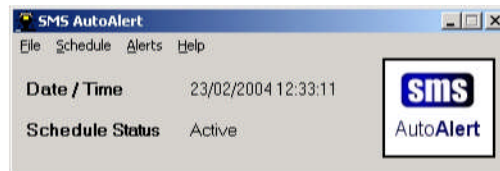


CAUTION !! All new procedures and processes should be checked in the 'Test' environment before being applied to the 'Live' business system.

AUTO ALERT



1. INTRODUCTION

SMS AutoAlert is a stand-alone 'Critical Report Emitter' application designed to detect specific company critical situations within the Sage Line 100/SMS Sapphire Manufacturing system, and automatically send the relevant information to particular users via email.

The application is split into two parts

- A System Controller, which co-ordinates the scheduling of the necessary tasks, and production of emails.
- A number of Alert 'modules', each of which detail a single situation upon which the application will report.

Each Alert module can be independently activated and deactivated, and each one contains its own list of recipient email addresses, as well as its own email message details. Additionally, the body of each Alert Module's email can contain fields from any table relevant to that specific alert. For example, the Late Purchase Orders Alert can include within the email any information from the relevant Purchase Order within Sapphire Manufacturing, as well as the relevant Purchase Line. The message body content is defined in simple HTML script and can be amended from the standard layout (available by default). The application is service based which means that it can run without leaving the machine logged in.

There are currently five alerts within AutoAlert (see below), and new alerts are currently being developed with the AutoAlert community. New Alerts will be made available through the SMS website along with sample messages.

ACKNOWLEDGEMENTS

Chris Butchart – SMS Research & Development Centre, Dundee

2. LATE PURCHASE ORDERS - INTERNAL

This Alert sends internal emails to a recipients list when a Purchase Order has not been received into stores and the Purchase Order Line Due Date is beyond today's date. The emails sent through this Alert are sent to a predefined list of recipients. A 'Number of days to check' filter allows older Purchase Order Lines to be discarded. All Purchase Order Lines satisfying these criteria are combined into one report for easy supplier chasing. The default HTML script provides the supplier's account details including their Account Name, Account Number, Their Main Contact Name and Telephone Number. However, any field from the Purchase Order Header or Purchase Order Line tables can be inserted into this email.

Late Purchase Orders Alert

PO:- P 1043 Account:- DC002 Dundee Contractors Ltd [Contact:- Brian East 01382 611977]
 ● 3500 of **Sand Type R** (Dried Sand DS-7589) *should have been delivered on the 14/02/2004*

PO:- P 1044 Account:- PE002 Powell Electricians [Contact:- Paul Allen 01382 666324]
 ● 2 of **Fuse Box 27** (FB-27-13-A) *should have been delivered on the 17/02/2004*

PO:- P 1041 Account:- SB007 Stewarts Builders Merchants [Contact:- Ian Duffy 01241 875172]
 ● 100000 of **Bearings 157** (Bearings CBR-157) *should have been delivered on the 17/02/2004*

PO:- P 1042 Account:- TR001 Tayside Roofers [Contact:- Ian Smith 01382 731778]
 ● 1250 of **Welsh Slate** (WS- 52x25) *should have been delivered on the 15/02/2004*

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3. LATE PURCHASE ORDERS – SUPPLIERS

This Alert is a development and extension of the above Internal Alert. However, instead of emailing employees internally it emails the suppliers themselves providing a powerful mechanism to chase suppliers whose goods have not been received into the system by the date specified on the Purchase Order Line. As this is fundamentally different to the Late Purchase Orders – Internal alert it is written as a separate report enabling these two reports to be run together to provide both internal and external warning mechanisms.

All overdue Purchase Order Lines for each supplier are consolidated into one email per day. This is important as it prevents multiple individual emails and therefore less chance of the emails being discarded by suppliers. The subject of the email is the Supplier's reference and the Purchase Order Number. Overdue emails are sent marked with an urgent flag and the Email message are prefixed with 'OVERDUE'.

AutoAlert is driven by the Purchase Order Lines rather than the Purchase Order Header, allowing multiple delivery dates as occur on Scheduled Orders to be handled. A 'Number of Days to Check Back' setting will define how far back the Alerts system is to look from today based on the Purchase Line Due Date. A setting of '0' will just look at orders as far back as today's date. A 'Number of Days to Check Forward' setting will define how far into the future the Alerts system is to check from today based on the Purchase Line Due Date. A setting of '0' will look at order lines only as far forward as today's date. Any field can be pulled from the Purchase Order Lines and the Sage Line 100 SYS-E-CONTACTS tables onto the email body. An email will be sent to the supplier's email address, which can be set up under E-Contacts against the Purchase Ledger accounts.

4. OVERDUE SALES ORDERS

This Alert sends internal emails when a Sales Order Line has not been delivered and the Sales Order Line Due Date is beyond today's date. The emails sent through this Alert are sent to a predefined list of recipients. A 'Number of days to check' filter allows older Sales Order Lines to be discarded. All Sales Order Lines satisfying these criteria are amalgamated onto one report for easy customer contact. The default HTML script provides the customer's account details including their Account Name, Account Number, Their Main Contact Name and Telephone Number. However, any field from the Sales Order Header table or Sales Order Line tables can be included on this email.

5. LOW STOCK LEVELS

This Alert sends an internal email to a recipients list when a Stock Item has an In Stock quantity, which is less than its Reorder Level. All Stock Items satisfying this condition will be combined on one report and sent to the recipient. The default HTML script details the Item Number, Item Descriptions, In Stock and Reorder quantities. It is possible to easily add other stock detail such as Promised and On Order quantities to the report or any other fields from the Stock Control File and the parallel Sapphire Manufacturing Stock File.

6. SALES LEDGER OVER THE CREDIT LIMIT

It is critical to know when customers have exceeded their credit limit to bring the situation under control as soon as possible. This Alert sends an internal email to a recipients list with a combined list of these customers. By default the HTML script details Customer Account Number, Account Name, Credit Limit as well as contact details so that customers can be contacted without having to perform any system enquiries. It is possible to easily supplement this information with any other detail from the Sage Sales Ledger.

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