

## KnowledgeSync 2000: 25 Financial Alert Scenarios



### Why Do Financial Software Users Need KnowledgeSync?

Organizations that use financial software applications (such as Great Plains, MAS90, or Solomon) know that maintaining superior customer relationships and making the best financial decisions often depend upon access to time-sensitive information. Whether it's to automatically respond to a client's order through an e-mailed "order confirmation," or to detect stock that will need to be written off if not sold promptly, KnowledgeSync provides organizations with the real-time delivery of critical application data that can spell the difference between profit and loss.

Here is a listing of some of the most common alert scenarios that KnowledgeSync can address in the financial software space:

- 1) Identify stock that will be written off if not sold promptly – and alert staff, partners, and clients to a special discount or incentive if this stock is purchased within 'x' amount of time.
- 2) Identify human errors (like pricing errors or mis-matched product components) and alert the appropriate personnel.
- 3) Notify your finance department about discounts gained through early payments
- 4) Identify project component delays, calculating whether the end completion date will be affected, and alert the customer as to whether their deadline will be affected.
- 5) Alert customers to products that will arrive before the estimated delivery date, or projects that will be completed before the estimated completion date.
- 6) Provide repeat customers with automated sales incentives
- 7) Identify a surplus in stock and notify resellers that you are initiating a special discount, "spiff," or rewards program.
- 8) Automatically e-mail reorders to suppliers
- 9) Fraud checking: monitor for abnormal prices or quantities and alert finance and/or legal departments.
- 10) Stock aging alerts: notify management about items that need to be incented.
- 11) Compare product forecasts with actual orders to anticipate shortfalls or excesses.

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### Why Financial Software Users Need KnowledgeSync (con't)

- 12) Identify product cost increases, monitor for excessive increases, and match these products to pending orders (and notify the clients)
- 13) Check for variations in shipping costs or excessive freight costs
- 14) Monitor for changes to clients' "standing orders" (particularly reductions to such orders) and alert the sales and finance departments
- 15) Check for sales quotation date expirations 'x' number of days in advance; send reminders to sales staff and to corresponding clients
- 16) Check for limited-time price offer expirations; correlate to standing orders and send alerts
- 17) Identify overdue sales orders
- 18) Monitor for overdue purchases/deliveries from suppliers; send alerts about both single incidents and about trends identified for specific suppliers
- 19) Send alerts about excessive discretionary discounts applied to specific product lines or applied by specific sales personnel
- 20) Monitor for salesrep commissions above / below pre-determined thresholds
- 21) Monitor for employee expenses or draws above / below certain thresholds
- 22) Monitoring supplier performance trends, such as short shipments and damaged / defective items
- 23) Identify and alert customers to loyalty bonuses such as frequent buyer programs, and approaching rewards-level thresholds
- 24) Monitor stock shortages & overages between locations – to move stock around to meet regional demand
- 25) Check for pending orders placed for customers on credit hold and alert sales, finance, & the client.

### About Vineyardsoft Corporation

Vineyardsoft Corporation is headquartered on Martha's Vineyard, MA, and is the leading developer of unified e-business alert messaging software. Founded by James R. Murphy, a pioneer in the development of customer relationship management software, Vineyardsoft enables clients to analyze, identify, and distribute critical, time-sensitive business data to employees, business partners, and customers. Vineyardsoft's mission is to empower clients to respond more quickly, intelligently, and profitably to changes in an organization's business where timing is critical to success, and where information needs to be delivered via e-mail, fax, pager, PDA, cell phone, and the web. For more information on Vineyardsoft, call 508-696-6495, e-mail [info@vineyardsoft.com](mailto:info@vineyardsoft.com) , or visit Vineyardsoft's Web site at <http://www.vineyardsoft.com>.