

Alerts, Not Reports

Alerts in a Typical DealerAlert Installation – Revised January 27, 2016

There are hundreds of thousands of different configurations that can be set up, the purpose of this list is to give users some ideas to get started. **Note that most E-Mail Alerts contain click-able hyperlinks to backup (source) documents**

Parts Alerts

- Alert when parts are sold with gross profit less than X%
- Alert when parts just issued on ROs have grosses less than X% (while there is still time to change pricing)
- Alert when part's sale price is manually changed at time of sale
- Alert when parts receipted are over \$X or quantity of Y (detects posting errors and people spending money they weren't authorized to spend)
- Alert when part sold is over \$X, and/or to specific customer(s) or by specific employees
- Alert when cores are removed from warranty ROs (tag 'em and pick 'em up before they disappear)
- Alert when sublet or miscellaneous charges are removed from ROs
- Alert when freight charges are removed from ROs
- Alert when locally purchased parts are removed from ROs (let's send it back!)
- Alert when store 1 **should** fill a customer order from store 2
- Alert when store 1 **should have** bought from store 2 **but** ordered from manufacturer instead
- Alert when a held order contains a part we can "steal" to fill an emergency order
- Alert when a customer has had a part on order for X days or on back order for any length of time
- Alert when parts hits "back order" status
- Alert when a part for an RO is taking too long or didn't show up overnight as expected
- Alert when a parts ordered "Next Day Air" (for example) didn't come in by 10:30
- Alert parts counter person when an order he/she placed has arrived
- Alert when ALL parts have now arrived for a particular RO
- Alert outside parts salesperson that their customer's order came in
- Alert when we forget to order a customer's part
- Alert when intercompany PO's remain open (detects potential theft)
- Alert when customer's price code (or anything else) was changed
- Alert when Paccar coupons are not applied, or are applied incorrectly
- Alert when a stock class / source was changed

Parts Extras

- Automatically build parts cross references for line-make prefixes (mainly for on-line parts sales) so that numbers that employees and customers type in, get crossed to the real part number. Cross references generated include:
 - Remove prefix when it is the same as its stock class
 - Remove prefix when it contains alpha characters only
 - Remove all dashes as well as prefix
 - Simply remove all dashes
 - Remove suffixes specified in a list

Dealer Alert

- Automatically schedule, run, and distribute manufacturers parts price update files
- Automatically distribute most any DSI report on a scheduled basis
 - Optionally only deliver certain lines of the DSI report (totals and summaries for example)

Service Alerts

- Alert when RO is open for more than X days
- Alert when an RO is “stale” (no parts Issued, no labor billed) for X days
- Alert when RO just closed has poor GP, efficiency, or productivity
 - Many options to limit the scope of the alert (warranty, certain techs, etc)
- Alert when work has not started on time-committed ROs
- Alert when RO was just opened or closed or estimated for a particular customer
- Alert when RO was just opened or estimated with labor type X (use for policy or internal ROs)
- Alert when ROs need POs
- Alert when RO took more than X days/hours from last punch to close
 - Many options here (labor types, etc)
- Alert when the other shift added notes to an RO
- Alert when cumulative or consecutive technician time on break/lunch/shop/etc exceeds your acceptable threshold

Service Extras

- This week’s efficiencies by writer and by tech
 - Color coded graphs
- This month’s efficiencies by writer and by tech
 - Color coded graphs
- RO Throughput – Ranks and graphs all stores by:
 - Time from first punch to last
 - Time from open to first punch
 - Time from first punch to last
 - Time from last punch to close
 - Ranks enterprise-wide as an option (all stores)
- Automatically distribute most any DSI report on a scheduled basis
 - Optionally only deliver certain lines of the DSI report (totals and summaries for example)

Office Alerts

- Alert when someone overrides AR credit threshold
 - Many options that limit alert to certain people who released the credit hold, certain customers, certain thresholds, etc
- Alert when it’s the last day of the month and there are uncleared credit holds
- Alert when a customer just hit over 60 days (let’s call ‘em)
- Alert when an unexpected payment is received (from delinquent customer)
- Alert when payment is not received for X days where customer is over Y days in arrears
- Alert when payment is received from a customer with a \$1 credit limit
- Alert managers when a customer is put on COD status
- Alert managers when a customer is taken off COD status
- Alert when credit limit is changed
- Alert when there is an unmatched payment to invoice

Dealer Alert

- Alert when there is an over-credited invoice
- Alert when parts are paid for and later returned
- Alert when customer is skipping/avoiding an invoice
- Alert when customer took a credit, but never paid original charge
- Alert when an invoice is overdue
- Alert when customer promised to pay and did not (or paid short)
- Alert when a check is written over X (except to certain vendors)
- Alert when a customer tax exemption is missing or expired
- Alert the team when we have a new charge customer
- Alert when there are unpaid cash invoice over X days
- Alert when there are unpaid warranty claims over X days
- Alert when items are billed to a policy account
- Alert when finance charges are written off (over X dollars)
- Alert when parts inventory (for example) just exceeded X dollars
- Alert when MTD meals and entertainment just exceeded X dollars
- Alert when any GL posting meets your criteria (person, journal, amount, etc)
- Alert when vendor name on check doesn't match vendor name in system (fraud detection)
- Alert when vendor name is changed, then changed back (fraud detection)
- Alert when customer's sale-type or tax status (or anything else) was changed
- Alert when sold vehicles have not been paid off with X days of deal being funded

Office Extras

- Nightly Customer clean up
 - Change Casing to All Caps on Name and Address
 - Search Optimize for DSI "Question Mark" Search (fix abbreviations, ampersands, etc)
 - Change City Compass Direction to USPS Standard
 - Change Street Abbreviations to USPS Standard
 - Suffix customer name with asterisk if customer has AR statement e-mail delivery
 - Prefix customer name with billing program if customer belongs to a billing program
 - (Freightliner Corcentric, Paccar fleet billing, etc)

Sales Alerts

- Alert when new/used vehicle hits X days old
- Alert when used vehicles could be floored but they're not
- Alert when RO is closed to a sold vehicle, sold more than X days ago
- Alert when sales department policy account is billed
- Alert when RO is opened against a vehicle or opened to sales department policy

Other Alerts and Extras

- Alert usage report (Monitors who was sent alerts and who READ their alerts)
- Data extractor – sends multi-company (enterprise) Excel file as attachment for any data table in the system.
- Run a Macro – runs most any DSI report on a pre-determined schedule and delivers it to your staff. Features include the ability to parse the report, sending only portions of the output (totals, for example). Also allows for multi-company reports in same e-mail.