CEO JUICE
Nutrition for Your Business

Take a moment to check out all our alerts. The alerts you are currently subscribed to are listed on top. If you would like to make any changes head to http://www.ceojuice.com/alerts to subscribe or unsubsribe to any alert.

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	CEOJuice	76	Notifies you of any add/change requests to events subscribed to by your company.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	CEOJuice	77	To keep you aware of what events are currently active at your site.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	CEOJuice	78	Notifies you monthly of the events in the CEO Juice Business Process Database that are currently active at your site. Also shows the top 5 most popular alerts you are not subscribed to. You should subscribe your CEO to this and ID 79.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	CEOJuice	79	Sends you a quick note anytime we add a new event/report to the CEO Juice Business Process Database so that you can determine if it's something you want to implement in your site. You should subscribe your CEO to this and ID 78. We are in the process of replacing this with our "Keep me updated" alerts based on your login and preferences.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	CEOJuice	94	This alert is a heartbeat that comes from your system every hour so we know it's running. We have had many occasions where we have known about a customer's network being down hours before they did. We can send an email to you but typically if the network is down email is also, so we suggest a text message. You may have your own system in place, if not and you want this let us know what number(s) to text.	VariableW=After hours contact cell number for text message, enter multiple separated by a comma VariableX=Names associated with numbers above (same order) VariableY=Not Used VariableZ=Not Used
No	CRM	11	This report tells you how much time the sales people are spending in the database. When used correctly, this should indicate the approximate time they arrive and leave work as well as how much work they are doing. This can be used for non-sales personnel as well.Â	VariableW = Not Used VariableX = Not Used VariableY = Not Used VariableZ = Not Used
No	CRM	12	Alerts the sales manager the moment a sales person adds a new sales forecast. It also confirms that all of the details are collected.Â	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	CRM	13	Shows the Sales Manager/CEO a list of all deals the sales department says will be closing this week. There is also an option to choose which deals above a certain confidence percentage are to be included.Â	

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	CRM	27	To ensure accurate data is in the sales pipeline, use this alert to make sure the salesperson updates the expected close date if it is in the past.Â	
No	CRM	28	Alert sales manager when a sale is lost.	
No	CRM	29	This alert generates the weekly report salespeople are required to turn in which covers cold calls, appointments, demos, etc. There is also an option to alert if certain levels are below X amount.Ãƒâ€šÃ‚Â	VariableW = Not Used VariableX = Not Used VariableY = Not Used VariableZ = Not Used
No	CRM	30	Ensures all existing contract customers are contacted every 90 days.	
No	CRM	31	Ensures your potential major account customers are contacted every 90 days.	
No	CRM	42	This alert sends an email from the sales department to the finance company asking for credit approval when the forecast sale stage is greater than W level.Â	
No	CRM	43	Sends an email from the sales manager to the sales department Friday morning if there are no new sales entered for the week.Â	
No	CRM	67	Shows a pipeline by sales person of all forecasted sales for the next 30 days.Â	
No	CRM	71	Notifies the sales manager of forecasted sales for sales people who have left the company.Â	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	CRM	73	Show a pipeline by Sales Person for the next 60 days.	
No	CRM	74	Provides a list of all current customers with equipment under contract who have not been contacted by sales in W number of days.	VariableW = Days not contacted VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	CRM	81	Alerts the sales manager when a sales forecast is missing some information.Â	
No	CRM	91	Ensures sales reps complete their appointments. Very useful for alerts that look at data captured after the appointment.Â	W Codes excluded (personal) X Exclude older than X days Y Not Used Z Not Used
No	CRM	98	Ensure sales reps are contacting leads. A pending call is created in the database for a new sales lead; sales reps are reminded until the call is completed. Use ID 126 as a follow up alert.Â	W Code for call
No	CRM	126	Allow you to track leads contacted by sales and determine which are valid. Use with ID98.	
No	DocuWare	235	This alert is part of the sales paperwork process to notify purchasing / warehouse that the financing on a deal is approved and it can now move forward to purchasing/fulfillment.	VariableW=Status Code set in Docuware that triggers alert VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	DocuWare	237	To notify designated person(s) when a docuware document status is changed to the codes set in VariableW or VariableX . This step represents notifying whether or not the product on the sales order is instock or needs to be ordered.	VariableW=Status Code of docuware document for Not in Stock VariableX=Status Code of docuware document for InStock
No	eautomate	1	Determines where the tech is when dispatched to a call but has not yet arrived. Escalation alerts are ID 38 and 39.	Variable W Number > Hours Variable X Number < Hours Variable Y = NOT USED Variable Z = Tech Notification Method (must be "text", "email" or "none")
No	eautomate	2	When a technician forgets to close a call at the end of the day we send an email from dispatch to the tech. Escalation alert is ID 16.	Variable W = Hours (Military HRS) Variable X = Minutes Variable Y = Not Used Variable Z = Tech Notification Method (must be "text", "email" or "none")
No	eautomate	3	This alert checks to see if there are any past due tasks scheduled in eAgent. Past due eAgent tasks usually indicate that eAgent is not currently running. If you are not using eAgent we feel you should be and we are happy to help configure.	VariableW = Not Used VariableX = Not Used VariableY = Not Used VariableZ = Not Used
No	eautomate	4	Some dealerships require that their technicians call the customer for all new calls within X minutes. This alert monitors those calls where the priority is W for longer than X number of minutes, indicating that the technician has not called the customer, changed the priority, or notified dispatch to change the priority.Ã,Â We suggest setting the initial Priority Code to New Call and when the tech calls the customer it is changed to a different code. Escalation alert is ID 5.	Variable W = Priority Code Variable X = Minutes Open Variable Y = Not Used Variable Z = Not Used
No	eautomate	5	This is the escalated alert on ID 4, where calls with a particular Priority Code are greater than X number of minutes from when the call was opened. We suggest this escalated alert should have a manager's email in the From Address field.	Variable W = PriorityCode in eautomate Variable X = Mins since opened Variable Y = Not Used Variable Z = Not Used
No	eautomate	6	If you don't have a specific technician assigned to each equipment record, then the calls will be automatically set to the tech you chose to receive unassigned calls. This tech acts like a place holder so you can easily identify those calls that need to have a valid technician assigned. This alert helps you keep track so that calls aren't Unassigned for too long and no tech is ever alerted to handle the call. Escalation alert is ID 7.	Variable W.WW = Hours UnAssigned (decimal..ex .25 = 15 minutes) Variable X = Not Used Variable Y = Not Used Variable Z = Technician Name for your UnAssigned calls

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	7	This is the escalated alert for ID 6 that sends a different message subject for calls still Unassigned after W.WW number of hours.	Variable W = 0.00 Hours UnAssigned (decimal..ex .25 = 15 minutes) Variable X = Not Used Variable Y = Not Used Variable Z = The tech name you setup in e-automate to be your unassigned technician
No	eautomate	8	Alerts your accounts receivable person that a new service call or supply order has been placed and is on hold for the specified reason code. Typically, this is 'CH' for Credit Hold. Additional on hold codes can be entered into Varaible W. Multiple codes can be entered, but they must be separated by a comma.	Variable W = On Hold Codes in addition to CH(CH included by default) *Codes must be comma delimited* Variable X = NotUsed Variable Y = NotUsed Variable Z = NotUsed
No	eautomate	9	This alert notifies you of calls that are on hold for parts (System On Hold Code [WP] and we suggest that you setup any other onhold for parts to have the characters WP in them as well) for greater than the business hours elapsed specified in variable W. If there is a PO for the item it will show up in the table as well. There will also be an escalated alert sent after X number of hours. The first alert goes to the ToAddress1 and the escalated alert goes to the ToAddress1 and the ToAddress2 .	Variable W = Business Hours elapsed On hold WP Variable X = Business Hours to Escalate if still on hold Variable Y = Not Used Variable Z = Not Used
No	eautomate	10	This alert informs you of calls that have been sitting in the queue for too long even though the parts have been on the shelf. [20111004]-Updated to use DateDiff and not rely on ZCJCallTimes log	Variable W = Hours Available Variable X = Not Used Variable Y = Not Used Variable Z = Not Used
No	eautomate	14	Monitors techs that are possibly just installing parts at a problem. This alert also allows management of which techs to track from within e-automate.	VariableW = used within Days VariableX = Items Avgcost > 0.00 VariableY = Tech CustomProperty attributename VariableZ = Not Used To specify which techs to check, set attributename = Y (assigned to the custom properties of the Employee record and value set to Yes)

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	15	Notifies appropriate persons that a tech has forced a meter from Remote Tech into the system where there is an average 3 month volume for the meter on the machine. If e-automate has 0 for the Average 3 Month volume, this alert will ignore that forced meter.	VariableW = Pct over Daily Avg (do not put the % sign in, just the numbers..!!) VariableX = Not Used VariableY = Not Used VariableZ = Not Used Be aware; you must enter a numeric value in Variable W. If you enter enter anything other than numbers, or if you leave it blank, the alert will error out on your Core Server and will not run at all.
No	eautomate	16	This is the escalated alert on ID 2 which is used to notify the tech's manager that the tech is still dispatched on a call after hours.	VariableW = Hour VariableX = Min VariableY = Not Used VariableZ = Not Used
No	eautomate	17	Alerts service management when a tech has been on-site between W & X number of hours. The tech is either having problems, missing in action, or forgot to close the call. We suggest our alert send an email from dispatch to the tech.	VariableW = Onsite >= than hours VariableX = Onsite <= than hours VariableY = Not Used Variable Z = Tech Notification Method (must be "text", "email" or "none")
No	eautomate	18	This alert is to let the technician and/or tech manager know about calls that are going to miss any guaranteed response times. We base the time off the Due time in eAuto as different customers may have different guaranteed response times. Call(s) that have been status = Pending and have not been dispatched for more than W hours and have less than X hours until due. If you want to know all calls status pending for more than 4 (W) hours, but don't want to know about those pending calls until they get to less than 3 (X) hours until due, then enter 4 in VariableW and 3 in VariableX.	VariableW = Hours Pending VariableX = Hours Until Due VariableY = Attrbute Name that flags Technician (Employee Custom Properties) as Field Tech (ZCJFieldTech for example). VariableZ = Call Types to exclude. Add EXACT call types separated by commas. If you wanted to know all calls with pending status for more than 4 hours, but didn't want to know about those pending calls until they get to less than 3 hours until due, enter 4 in Variable W and 3 in Variable X.

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	19	Used to catch certain contract types before they expire. This is very useful for watching renewable MPS contracts or ensuring Rental equipment is scheduled for pickup.	VariableW = BillCode(s) assigned to Contract (separate multiple billcodes with a comma if you want to check more than one) VariableX = Expiring Days < VariableY = Not Used VariableZ = Not Used
No	eautomate	20	Did we tell you the story about the customer with an extra zero in their overage rate? 12 months later when it was caught it was a $38,000 problem! Keypunch errors in meter billing overage rates can result in thousands of dollars of under/over billing if not caught before the error causes compounded problems. In this alert, you specify what amount BW and Color meter rates should never be at or below on a contract.	VariableW = B\W meters < .WWWW VariableX = Color meters < .XXXX VariableY = B\W meters > .YYYY VariableZ = Color meters > .ZZZZ
No	eautomate	21	This is to alert you on customers with a past due balance who are not being contacted. If you are using tasks within the AR Console, then this alert tracks past due customers who do not have any completed tasks. You can setup an attribute for customer custom properties to assign a # value to override the default # of days in VariableW. This would be for your major accounts where you want to allow a longer period for notes.	VariableW = No completed Tasks in W Days VariableX = Customer custom property for #Days No Note override VariableY = #Days Bucket for balance older than (must be 30, 60, 90 or blank) VariableZ = Total Past Due Amount >= $$$.
No	eautomate	22	This alert is used to verify billable supplies on a supply order.	VariableW = ItemUsageLimitMeterTypeID (1 for BW 2 for color) VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	23	This alert is a two phase alert. it will alert you when a sales order is created for $0 on an item but no contract was associated, and again if Supplies were shipped/invoiced out at no charge, yet were not associated with a contract. Some clients use sales orders to record setup supplies against a machine and need to exclude those orders. That can be accomplished by using a different Order Type code for those setup orders and putting that code (and any others you don't want to be alerted on for $0) in variableW above.	VariableW = OrderType(s) to EXCLUDE from this alert (separate multiple types to exclude with commas) VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	24	The process manages tracking PO Backorders from vendors. You only need to enter an estimated arrival date on the PO line items that are backordered with the vendor. The alert will then remind inventory managers to check with the vendor on backordered items not recieved W number of days past due.	VariableW = Days Past Arrival Date VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	25	This will notify inventory personnel that items have been transferred into a Defective bin so they can follow up to ensure that the part is returned from tech.Ã,Â	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	32	Used to make sure that all existing customers with lease expirations approaching are contacted. It is suggested you use ID 64 as well.	
No	eautomate	33	Alerts sales to customers with equipment that has doubled its volume over the previous quarter. This could indicate the need for more equipment.	
No	eautomate	34	This report is scheduled to run on Monday mornings and print each technician's call details for the last week. You can set up a (Yes/No) attribute type as a custom property on the employee file, and this report will not run for any employee where that value is specifically set to NO.If you dont want to use this custom property then leave variableW blank. 20110929 Added task steps to send totech.	VariableW = Attribute name on employee Custom Property to indicate employee is a fieldtech (Yes/No) VariableX = ServiceHourCode used for your company service hours VariableY = HoursPerDayTo AccountFor (9 if your techs enter timelog entries/dummy calls for lunch, 8 if you don't have them enter lunch calls) VariableZ = NotUsed
No	eautomate	35	A way to ensure that new equipment delivered to a customer receives the appropriate service & supplies until the contract is setup is to set a certain bill code on the equipment record's Bill Code field. Then, when the equipment has been installed for a certain number of days, the alert will tell you that no contract has been set.	VariableW = Install Billcode Description on Equipment contains VariableX = Days Past Install Date VariableY = NotUsed VariableZ = NotUsed
No	eautomate	37	A quick snapshot by technician of call board (starting calls, newtoday, newreschedules today, closed, cancelled, dispatched, onhold, wp, pendingnohold). NOTE: You must create a new Attribute called CEOFIELDTECH (type = Yes/No) in e-automate under Lists and Codes ....then also under lists and codes create a Configuration (Custom Properties) for Employee Properties using the ZCJFieldTech attribute. This custom property is so you can identify the Technicians who are truly Field Techs by setting the custom property on their employee record to Yes . This callboard alert will show all technicians with calls where the custom property field is set to Yes !	VariableW = Attribute name of employee custom property to identify FieldTechs VariableX = NotUsed VariableY = NotUsed VariableZ = NotUse
No	eautomate	38	This is the first escalation alert for ID 1. It shows calls dispatched greater than W number of hours and less than X number of hours.	VariableW = Dispatch > Hours VariableX = Dispatch < Hours VariableY = NotUsed VariableZ = NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	39	3rd escalation alert of ID 1. ID 38 must running well. Shows calls still dispatched for more than W hours.	Variable W > Hours Variable X = NotUsed Variable Y = NotUsed Variable Z = NotUsed
No	eautomate	40	There is a bug in Remote Tech that prevents all rescheduled calls with any badsync data from being created with the status BadSync . This alert will find those calls, notify the dispatcher, then call a stored procedure to change the OnHoldCode to BadSync. * Bug fixed in 7.6	VariableW = OnHoldCode to use to reassign call to. VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	41	Certain customers might have normal terms codes on their invoices (30 day, 45 day, etc.), but they traditionally pay later. The E-Agent On-Hold task will put them on hold based on the invoice terms due date; this alert resets the on-hold flag for those customers based on your given number of grace days. See ID 138 for another variation of this.Â	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed Set the Customer Type code to one containing a '~' and then two numbers for the actual days past due.
No	eautomate	44	Some service managers want to keep a check on the use of expensive parts, so this alert allows them to set the threshold and be alerted when an item is used that is greater than that threshold on a non-billable call. This alert is intended to be run once a day at end of day.	VariableW = ItemCost exceeding VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	46	This alert sends each technician a report of everything that comes into and out of their car stock (warehouse) each day. We expect them to review it and if everything is okay delete, the logic is that when it comes time to do car-stock 90 days later the technician can't say "I never got that".	VariableW = Attributename of custom property (Yes/No Type) assigned to employee file designating employee as a field tech VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	47	When equipment is installed, it often helps to set a temporary bill code to ensure nothing is billed while the contract is set up. This alert checks for bill codes with the word install in the code. It then checks if the equipment is not on contract and has X number of days since the Install Date on the equipment record.	VariableW = Install Billcode Description on Equipment contains VariableX = Days Past Install Date VariableY = NotUsed VariableZ = NotUsed
No	eautomate	48	Ideally, the Main Customer ID on all Equipment should always be assigned to a Parent Customer, and never to a Location of another Customer. The location should be assigned to the Location customer on the equipment thus maintaining the Parent/Child relationship on the equipment records. This alert checks that.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	51	To alert appropriate person(s) that items are on a PO Receipt that has not been Vouchered for over W days. Used to catch invoices that may not be paid before discount terms expire.	VariableW = DaysUnVouchered VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	52	Sends technicians a list of purchase orders for parts back-ordered on their calls today. If it's not on here, it has not been ordered.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	53	This is used by Service Managers/Owners/Sales to alert them when a new service call is placed for a specific customer or a specific piece of equipment. Turn this off/on using a new Attribute named "ServiceMgrAlert" assigned to the Customer & Equipment Custom Properties. Any time a new call is created for any customer or equipment that has this custom attribute set to "Yes", then the appropriate person identified on the alert subscription will be notified.	VariableW=Name used for Customer Customer Property attribute (must be Yes/No attribute) VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	54	There are times when you might have customers who want their internal HelpDesk (or support person) to be notified any time a call is received/dispatched/closed on equipment at their locations. Typically it's to help them track internal calls from users who are complaining about equipment we service being down and they want to be sure that a call has been opened and/or that the call has been closed and there is still a problem. You set up an attribute that's tied to Contacts then assign that to the Customer or Equipment Custom Property for the attribute set in VariableW (when call is opened/dispatched) and/or VariableX (when call is closed). The alert will then send an email to the appropriate person whenever a call is placed for that location. Alert 54 is designed to alert a customer helpdesk when a call is placed, 181 alerts the person who placed the call. So 54 always tell the same person, 181 will depend on who placed the call. VariableY is a safety check to not send the closed call alert on the invoice if it is invoiced more than that# of days from actual closed call date (so we don't send a your call was closed alert 15 days after it was closed). VariableZ is where you indicate if you want to include/exclude the techs remarks on the closed call alert.	VariableW = AttributeName for Open Calls VariableX = AttributeName for Closed Calls VariableY = #Days from actual closed call to invoiced tolerance (do not send closed call notice if invoiced date is Y days after call closed date) To avoid confusing customer. VariableZ = Include/Exclude Techs closed call remarks on call closed/invoiced alert
No	eautomate	55	To alert inventory that a new call was created on hold for Waiting parts or for BadSync. If you just want to notify if BadSync data on the reschedule call..then put only the word BADSYNC in variableW..if you want both badsync and WaitingParts, put BADSYNC, WP in variableY	VariableW = Total Parts Cost > W.WW VariableX = Max Part Cost > X.XX VariableY = Enter in list of onhold codes to alert [separate by comma ie: Badsync, WP] VariableZ = NotUsed
No	eautomate	56	For managers who want their parts department to be notified as soon as a new On Hold For Parts or BadSync call is created. In the alert email, calls with badsyncdata from Remote Tech will denote those items.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	57	Notifies tech that items have been received for a call that has been waiting on parts.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	59	There are cases where a call is closed and some part used on that call is being pulled from a warehouse that is different than the tech's default warehouse. This alert prompts someone to check. This does not happen as much with Remote Tech, but can cause your inventory counts to be off.Â	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	60	In an effort to invoice all calls labeled as OK to Invoice, this alert notifies the appropriate person(s) that a call has been sitting OK To Invoice for longer than W number of hours . If you are using the E-Agent Auto Invoice Service Call task, this can help you monitor when the calls that could not be auto-invoiced are not manually invoiced in the acceptable time frame.Ãƒâ€šÃ‚	VariableW = > Hours status OKB VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	61	Notifies appropriate persons that the GL Modules have been closedÂ	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	62	This is a procedure to update the Retail (Default) Price on parts based on formulas you provide (Ex: If last cost < 5.00 then retail = 15, if last cost > 5.01 and < 25 then last cost * 4, etc).	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	63	If you do not have accurate burden rates setup for all your technicians, then your service profitability reports will be incorrect in your labor costs. This notifies of burden rates not set up and/or if there is no email address setup for the technician.	VariableW = Burden Rate less than $W.WW VariableX = NotUsed VariableY = NotUsed VariableZ = CustomPropertyAttribute This alert works in conjuction with an attribute you need to create and assign to a custom property for your employees. When you create the attribute, create it as a Yes/No type. Give it a name and enter that name (ZCJFieldTech for example) in Variable Z so that we know which custom property field to look at. Â
No	eautomate	64	This alert should go to your contract/lease department so they can review the leases for accuracy and make the necessary adjustments in E-Automate. This alert should go at least a day or two before the 2nd alert that goes to your sales team. Ã‚Â Escalation alert is ID 65.	VariableW = (Expiring within W Months) VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	65	Alerts sales reps (assigned to the customer in e-automate) to leases that are expiring within the # of months you specify as (W) variable. Leases expiring within W months will continue to appear on this report until they are marked InActive! This report will also pull the last note off of the lease from the e-automate notes where the notetype = VariableX above. To alert the salesrep assigned in e-automate to customer..put SALESREP in the ToAddress1 subscription, to alert the reps manager instead of the salesrep (and allow the manager to distribute to reps) put MANAGER in the ToAddress1 subscription address, to alert both rep & manager put SALESREP in the ToAddress1 field and MANAGER in the CCAddress1 field.	VariableW = (# Months till expiration) VariableX = NoteType used for e-automate Notes on leases VariableY = Alternate email to use when no Sales Rep associated with customer. VariableZ = NotUsed
No	eautomate	66	Shows when a service call that started with a a billable service code was invoiced for zero dollars. Also checks to see if the Bill Code USED on the call does not match the bill code assigned to the equipment. Ignores all calltypes where the category is IR (install).	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	68	To alert the delivery scheduler & A/P that equipment items (checking for Model IsHost or Is Accessory) were received for a PO tied to a Sales Order.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	69	Used to alert the delivery scheduler and A/P that equipment items were received for a PO. It will also indicate in the email if the PO is tied to the sales order.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	70	Reminds users to go into E-Automate and update their company holidays for the next year so that the service response/down times all take those holidays into account.	
No	eautomate	72	Provides your techs a regular report showing their current warehouse quantity on hand. It not only shows the retail value at each item level, but also provides a total value at the top based on the average cost. It will also flag items as dead/dormant if the item has not been used or purchased since Variable W (number of days back from today) and has an average cost exceeding Variable X. VariableY is where you tell us the number of days of history to include for item transactions in the techs warehouse...if tech used item out of another warehouse then that usage will NOT appear in the history. VariableY should be the # of days between the schedule of this report (every 30 days or every 7 days) depending on whatever the schedule you prefer for us to run the report. If you only want to send this alert to your fieldtechs you need to setup a custom attribute as yes/no to indicate which employees are actual techs out in the field. There are a number of other alerts that share this same attribute for fieldtechs only.	VariableW = Enter in the # of days going back from today to see if item was not used on sales order/service call (or purchased) since that date and flag item as dead/dormant if not. VariableX = Flag items Dead/Dormant only if avgcost > XXX.XX VariableY = HistoryUsgeDays to show (0 shows no history) VariableZ = Attributename to indicate fieldtechs (ZCJFieldtech)

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	75	This report is meant to identify inventory items that were not used on Service Calls or Sales Orders in the last Y number of days specified and only show items with an average cost exceeding $XXX.XX. The report will run once for each category you identify and should be run monthly so you can write-off (devalue) those dead items over your fiscal year instead of taking a big hit at the end of the year. Usage is determined as any of the following transaction types: Sales Invoice, Sales Credit/Debit Memo, Service Invoice, Service Credit Memo, Purchase Order Receipt/Return, Sales Fulfillment, Inventory Assembly or Inventory Refurbishment. You can select items in based upon the category containing the characters in VariableW...or enter the word ALL in variableZ to select. 20110925:Added in the stocking code from the Main Branch default warehouse. Also added in LastPurchaseDate / LastServUseDate / LastSalesUseDate	VariableW = Category contains the word/phrase entered for VariableW VariableX = Cost exceeding $xx.xx VariableY = No usage in YYY Days from Today VariableZ = enter ALL here to have the alert select all items based upon the service code category = to P(arts) and regardless of category
No	eautomate	80	We had a client who during their conversion their quantities were created in a bin, but then in subsequent setup they used a different Bin for their Default PO Receipts Bin...thereby resulting in unintended quantities in multiple bins. So they asked for a quick alert to report all items with qty in bins not currently associated as the items default PO Receipt bin.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	82	Alerts your key admin person to review the key items (tax code, terms, etc) for a new customer account added to E-Automate. This version runs during the day every 15 minutes and sends an email with the information for each account created in the last 15 minutes. This alert is more of a real time alert; Event Output ID 139 is a slightly different version that runs at the end of the day and delivers a pdf report of all accounts created in last 24 hours.	VariableW = Not Used VariableX = Not Used VariableY = Not Used VariableZ = Not Used
No	eautomate	83	Alerts you with the key information regarding a new accounts payable vendor record.Ã‚Â	VariableW = Not Used VariableX = Not Used VariableY = Not Used VariableZ = Not Used
No	eautomate	84	Tells your key inventory person that a new item has been created in inventory and shows them the critical fields for that newly created item so they can proof that everything was set up and coded correctly. Alert ID 169 is a more sophisticated version which tells of changes also.	VariableW = NotUsed VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed
No	eautomate	85	This is a weekly version of the Daily Tech Warehouse Activity report which shows all inventory transactions through the technician's warehouse.See ID 95 for Manager summary.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	87	Capturing customers contact information is a critical component to communicating effectively to your customers. One of the best places to capture this information is when service calls are placed. If the contact is not in E-Automate, your dispatchers should take the extra minute to capture the caller's name, phone, and email address. Typically, the same person(s) calls on the equipment for service and once they are in E-Automate it saves many keystrokes on every call. If you decide to require your dispatchers to capture this information, this alert will notify you as new calls come in where the dispatcher did not create a contact or use an existing contact. Alert Creator on this.	VariableW = AttributeName of Custom property assigned to customers who do not want to be surveyed after calls VariableX = Category assigned to Contact to optout of survey VariableY = Additional category assigned to contact to indicate client refuses to give email VariableZ = NotUsed. We suggest you check the Creator box for this alert, but also cc dispatch as Creator only works if setup with login in e-Auto employee file.
No	eautomate	88	Alerts the appropriate person(s) of sales orders with Type W that are unfullfilled longer than X number of days. Sometimes orders drop through the cracks, so this is to remind the operator to follow up. By default, we notify the user who created the sales order (if their email is in their e-automate employee records). We show the available warehouse quantity for all fulfillment bins for that item for the default warehouse assigned to the branch on the salesorder)	VariableW=OrderType VariableX=DaysUnFilled VariableY=NotUsed VariableZ=NotUsed
No	eautomate	89	Prints a Thank You letter that will be emailed to you. You can then print them out and review them before mailing to your customers. It will look at the Sales Order type (typically Equipment) that you specify above in variable W. You will need to send us your specific Thank You letter.	VariableW = SalesOrder Type (Equipment) VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	90	For detailed documentation on the pre-requesites for this alert please download the attached relevant document) This alert checks parts used on service calls every 15 minutes (if you want different frequencey, please enter the desired frequence in the comments below) to see if an part was put on a service call that was previously replaced and that previous item fell below XX% of the mfg yield (Specified in variableX above) specified in e-automate. (The reason for this is that if the item got to within 95% of the mfg yield...you might not want to try a warranty claim...however if you want to be alerted using the mfg yield exactly as the cutoff, then enter 1 here (1 = 100%). Only Items that have a Yield >0 in e-automate are checked for previous usage. The parts warranty days (Entered in the Make Custom Properties in the field identified in VariableY above) is checked against the po receiver date for the host model/serial# to see if it's under original warranty, or using the same # days to check between the last time item was used on that model/serial#. The parts cost is checked against the value you enter on the Make Customproperty field (identified in VariableZ above) To send the report to the Technician, put the word Technician in the first ToAddress...and put the word Manager in the first CCAddress to send the report to the techs manager! Please note: This alert also uses the metertype associated to the each item for [item usage meter limit] and if you dont associate a specific meter type then the alert combines the actual meters (not the display meter reading) of B\W + Color (when a color meter exists on a model). If you specify a specific meter type of B\W or Color for the item usage limit check then only that that meter type is used in the copy yield calculation. Use Alert 189 if you do not have yield set on your parts.	VariableW=Text or Email (Text=send to Tech text address in addition to Email. Email = Email only) VariableX= % (Pct) within specified Yield...enter as decimal. 80% = .8) VariableY=Attribute name of custom property on the Make for Warranty Days VariableZ=Attribute name of the custom property on the Make for the cutoff $$$ you setup for each Make (min cost of items to be eligile for warranty. Canon for example might be $300, while Kyocera might be $150)
No	eautomate	92	We had some clients who found that, during their conversions to e-automate, a lot of bins were created that were not being used in E-Automate. So they wanted a list of all those bins that were not assigned as default bins on any items and do not have any item quantities associated with them.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	93	This is a nudge alert to notify the appropriate person(s) of all calls with (W) minutes of being due. A secondary alert will tell when the call is within (X) minutes of being due. The escalation will repeat every 30 minutes until the call is dispatched (or Due Date/Time is changed). This alert is for CM calls only. You have ability to also further limit this to calltypes that contain the characters you put in variableW (MI - [machine inoperable] for example) and then we only alert on those calltypes that hit the thresholds identified in W & X	VariableW=MinutesUntilDue (enter zero for example to be alerted when DueTime is missed!) VariableX=MinutesUntilDue (escalation alert...use negative for past due!) VariableY=OnlyIncludecalltype begins with(leave blank for all CM calls) VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	95	This is a summary/Detail report based on the Daily/Weekly Technician Warehouse Activity reports. All of these reports are tied to the Inventory Transaction History Log (Item History Report), and the Usage Dates are the date the transaction was actually invoiced/transferred in e-automate, not the Date of the call. See 46 for Tech Report.	VariableW=Detail/Summary mode (enter Detail to see the transction details, Summary to see only summary for each warehouse VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed If you have multiple service managers and want to send the summary of their techs to them, then put "Manager" in the ToAddress1 field of the subscription. The alert will use the email address of the manager assigned to the tech's Employee record.
No	eautomate	96	This alert is meant to help you identify accounts that have an active equipment count greater than variable W where the model category contains variable X. These accounts would be primary targets for MPS.Ã‚Â	VariableW=Active Eq Count Exceeds VariableX=Model Category Contains VariableY=NotUsed VariableZ=NotUsed
No	eautomate	99	The standard cost field in e-automate is a field not used within e-automate except for cases when your creating a po for an item and you have no Vendors setup for that item, in which case the standard cost field is used. Many of our clients have requested a routine to update this standard cost field with the current average cost for that item so that the average cost is up front and easily viewed. This alert will run a stored procedure to update the standard cost field for all items assigned to inventory code(s) that have the character string (word) entered in variableW or VariableX above.	VariableW=A Word or string of characters contained in the Inventory Code description..for example if you enter Supply in variableW then the procedure will update all items that are assigned an inventory code with the string supply contained anywhere in the code description VariableX=Additional character string contained in inventory code description VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	100	When a machine goes out on demo, then it's obvious that any service issues be addressed immediately. This alert works if you are using the equipment history tracking process of e-automate and changing the status of equipment going out on demo to a status code that contains the word demo for example. So when new calls arrive this alert will check the equipment status on the call. if the status had the word demo in it then the alert will be send to the email addresses you enter in the To/CC fields. If you want the Tech notified with this special notification then put the word Technician in the Toaddress1 field. If you want the salesrep notified, then we need to speak with you in person in order to know how we can extract the salesrep on the account from eautomate/saleslogix/Soaring/Compass/MSCRM/Act etc.	VariableW=Character string contained in the Equipment Status code you assign to equipment out on demo VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	101	Need to know about equipment with excessive service calls or should you wait until the customer complains? This alert is driven by the Call Back/Call Alert parameters set up for each equipment (even if it uses system defaults, model, or equipment parameters). The alert lists the equipment that has had calls in the last week that were either call backs or were set as call alert (X calls in Y days), even if another user chose to override the alert, (it will also show you who overrode the alert).	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	102	This alert is designed to be run once a month for the CFO/Accounting Person to review a spreadsheet report of their current mappings for their different President's Reports.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	104	The Cost Per Copy Overage report sends an alert to the sales rep on the account to have them research the reasons for a sudden change in overage percentage (both up and down). Now comes the sticky part. A lot of our clients are using 3rd party CRM systems and they keep the current salesrep / account assignments accurate in those external systems and do not update e-automate with the actual salesrep. So for those clients who do not want to update the sales rep on the account in e-automate with the actual salesrep we will create a custom property field and if your 3rd party solution is in a SQL database on your servers we will create a script to populate this custom property field nightly with the account/rep assignments from your CRM solution. Then this alert will work to send to whatever rep name in that custom property you identify in VariableY above. If you put the word CUSTOMER in variableY above, that tells us to use the sales rep you have assigned in e-automates inteface on the account.	VariableW=DaysBack toCheck VariableX=Pct Overage exceeds Base Allowance (enter 10 for 10%, 20 for 20% etc) VariableY=Attribute Name created and assigned to customer custom properties that identifies the sales rep for the account from your CRM system. VariableZ=Percent if BaseCopies exceeds actual clicks (Underage)

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	105	Customer records in e-automate cannot be delete, they can be inactivated though which means they are not available in the Drop Down search lists within the various modules (Sales Orders, Equipment, Contract, et). As records are inactivated, sometimes users don't realize that they might be deactivating an account that is actually the Bill-To or Parent of other accounts, thereby creating some potential problems. This alert checks all active customers and reports those are a location (child) of an inactive account and/or the bill-ton on that account is no longer active.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	106	REQUIRES FMACENTRAL TO BE RUNNING LOCALLY ON YOUR INTERNAL SERVER! In an effort to easily identify within E-Automate which customers have FMAudit installed. The easiest way to do this so that it was viewable from e-automate was to create a specific model and then create an equipment record using this special Model for each customer that has FMAudit running. Then your users can just run an equipment list from within e-automate for Model = FMAudit . This process requires: 1) You create a Model called FMAudit 2) You create an equipment record in e-automate for that model 3) You maintain that Active status accurately for that model (If for some reason the account no longer is serviced by you..or you are not running FMAudit for example at the account..then you need to mark that equipment record for the account InActive !	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	107	Creates a list for your CFO/Head Accountant/Bookkeeper to review each day, showing all voided invoices and the corresponding CM that was issued.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	108	This is a two-stage alert. When a new call is created and the Terms Code on the call contains the word you enter in variable W (COD for example), the person(s) entered in the To/CC fields will be notified so they can call the customer to make arrangements for payment. They will enter the payment details in the Problem Description field along with the actual problem description (ex: See Melissa to pickup check). The second part of this alert happens when the call is dispatched. The technician will receive an alert with the call number, customer, and contents of the problem description field so they will know how to get payment.	VariableW=The string of characters to search for in your terms code ...ie (COD) VariableX=To alert technician via email of COD call info as call is dispatched (YES/NO). VariableY=NotUsed VariableZ=NotUsed If you use multiple COD terms codes, make sure they all have the characters COD as part of the Terms Code (not the code description) so that the alert knows what to check.

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	109	Our closed call survey is our most popular process, this process will have the single biggest impact on your business, we would encourage you to just get it started and tweak it later. See the link for an overview http://www.ceojuice.com/docs/closedcallsurvey.htm. Not only does it give you an automated way to survey your customers ongoing but we push the results back into e-Automate so you can run reports. Would it be useful to be able to see how your customers stack ranked your techs? What about solving customer service issue before they gain momentum? Add alert 87 to ensure Dispatch gets a valid email. http://lnkd.in/TCD8TY Our tool to measure customer satisfaction is tied into this survey, more at http://lnkd.in/itP_rs. We provide a Dashboard where you can review survey responses, many clients have significant success using this as a sales tool, more at http://www.ceojuice.com/docs/DashBoardOverview.htm.	VariableW=# Business Days you want to wait after a call is closed to send the followup/survey (will not send if call is rescheduled or if a Pending call is still open for the equipment) VariableX=AttributeName for Custom properties on Customers to disable all survey emails VariableY=Contact Category assigned to specific contacts who wish to opt-out of all surveys. VariableZ=Type "All" if you would like to see all surveys that are completed instead of targeted answers
No	eautomate	110	This is to allow all technicians on specific teams (using the actual Territory code assigned to the technician record) to see the open/hold calls for their team so they can assist each other with call loads as the day progresses. This alert would normally go out at 9 / 12 / 3 during the day, but if you want different scheduling entering the schedule you would like in the comments when you subscribe to this alert. This alert does require that the Attribute & custom Configuration be setup properly, and we can help you with that once you subscribe to this alert.	VariableW=AttributeName of custom property assigned to e-automate employee to check if Tech Should Receive Alerts VariableX=your email domain VariableY=NotUsed VariableZ=NotUsed
No	eautomate	111	This alert will send a list at the end of the day for calls opened today for equipment that is missing a meter contact person. The concept is that perhaps the caller on the call might be a potential meter contact, so this alert lists the call#, customername, model, and the caller's information who placed the call for your contract admin to call that contact to see if they should be the meter contact, or if they can tell you who should be.	VariableW=NotUsed VariableZ=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	112	Properly monitoring misc debit / credit memos issued can lower the risk of theft thru a/r fraud. Typically runs on Monday for previous week.	VariableW=Amount Exceeds (debit or credit) Variable X=NotUsed Variable Y=NotUsed Variable Z=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	113	This alert is to notify the appropriate person(s) of the contract equipment terminated today. Some dealerships might want to notify the sales reps, so if you are assigning/maintaining the correct salesreps to your contracts in e-automate and wish to send them the alerts for their equipment then select ToSalesRep in the subscription and an alert will be sent with equipment/contracts they are assigned to. Client asked us to exclude certain contracts where the contracttype code ended with the character string specified in VariableX above. Leaving this blank means all contract types are included.	VariableX=ContractCode ends with character(s) to ignore VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	114	There is a check box on the Billing/Contact tab on service contracts labeled Bill Contract. If this check box is turned off then the contract will not show up for billing in the Contract Billing console, regardless of any other settings. Contract administrators wanted this alert daily so they would know if another user in another dept or someone inadvertently turned off this check box. Option to exclude certain contracts where the contract type code equals the specified codes in Variable W above. Leaving this blank means all contract types are included.	VariableW=Contract Type Code(s) to exclude - Enter the exact Contract Codes (multiple separated by comma) VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	115	To identify possible billing errors where the contract should have had at least base copies billed but the contract billed with zero copies.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	116	Ideally, the Main CustomerID on all Contracts should always be assigned to a Parent Customer, and typically only in rare exceptions should the contract customer be a location of another customer. This alert checks that to notify if this rule is not followed. VariableW is the attributename we setup to be used on the contract custom properties that will "Disable" this alert from checking that specific contract. This is for the exceptions where you need to have the "location" customer assigned as the contract customer.	VariableW=Attribute Name assigned to Contract Custom properties to override this alert VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	117	To alert supply department that an online order has been created on e-info and the quote needs to be reviewed and converted to a sales order for processing.	VariableW=Frequency in Minutes to check for new orders VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	118	To alert your FMAudit administrator of new accounts created within FMAudit that might need to be linked to e-automate and/or to your CRM system.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	120	This is to notify the appropriate person of all Accounts in FMAudit that are not linked to either E-Automate or your CRM solution. This alert is only applicable if your are linking FMAudit data to a CRM solution (Saleslogix / Goldmine / Compass /MS CRM). If you are not linking FMAudit to any CRM solution then this alert will not work as designed.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	122	Installation of FMAudit in new accounts is the most critical part of implementing that system. Dealers who are having the most success with FMAudit have embraced the challenges of installing and maintaining the software in their accounts and use the dispatch system to create calls for their techs for installation. They do this creating specific calls for a specific problem code (FMInstall for example) so that they have a specific closed call as evidence that the software was installed and tested. They then can notify the appropriate personnel that FMAudit is in an account so that others can continue with their part of the process (linking the FMAudit records to e-automate, to their CRM, etc). This alert is only useful for dealerships who embrace the idea of a separate FMAudit call for the tech for the installation, and this alert is only for completed calls. There is a second alert to list all the FMAudit installs that failed. In order for these Contra alerts to work..how you setup the Problem codes for call resolution are critical. For example, they should all start with FM ...and you should have only one that is used to indicate a successful Install (FMInstall) for example..and you might have multiples to indicate problems that prevented the succesful install (FMPCProb, FMCustDecline, so on and so on for the level of detail you want to track).	VariableW=ProblemCode setup in e-automate used on your FMAudit Install service calls. VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	123	This is the contra alert for Eventoutputid 122 (Succesful FMAudit installs). 122 works by reporting all the calls with the Problem code you specify in VariableW for that event, and that problemcode should indicate the successful installation. This alert is to report all the un-successful installations, so instead of listing all the possible reasons different dealerships might want to track, we use some logic around your Problem Codes. You would need to have all your FMAudit problem codes start with FM for example..and have only one of those problem codes indicate success...while all the others would be reasons why the install was not successful (pc issues, customer declined, firewall issues, etc..). Some Examples we've seen used are: FMREFUSE: FM AUDIT REFUSAL FROM THE CUSTOMER FMRDSI FM AUDIT REFUSAL SHIPIN FMNTC FM AUDIT NON COMPATIBLE FMUTI FM AUDIT UNABLE TO INSTALL FMINSTALL FM AUDIT INSTALLED FMFIX FM AUDIT FIX FMAC FM AUDIT ALREADY COMPLETED	VariableW=Problem code for your succesful install (ie: FMInstall) VariableX=First two Characters of all your problem codes used for FMAudit calls. (ie:"FM" assuming you make all your FMAudit problem codes start with "FM") VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	124	This is a custom report to use in lieu of the standard Service Calls Waiting For Parts pick ticket. This task will send the pdf pickticket for each new call that has the standard e-automate statuses of WP (Waiting Parts) or Badsync (waiting parts but parts requested by tech are not in system). Using the equipment serialnumber on the call it locates the PO Receiver the equipment was purchased on and received into your inventory to identify the PONumber and date of purchase. From that we determine the # of days elapsed to the call date and compare the days elapsed to the WtyDays Custom property you create/assign to the Make for that model (use the exact same values/custom property as EventOutputID 90 for the warranty parts yield alert) to determine if the Equipment on the call might be under manufacturers warranty and will flag the pick ticket as Machine Warranty. This custom version also will identify on the parts section of the pick ticket the bin for the item (using the default POR bin assigned to that item) and the available qty in that main POR bin plus the available qty in all your warehouses, and it will flag any items marked Returnable in the item setup by printing CorePart / Returnable on the pick ticket under those items.	VariableW=Warehouse (not warehouse description) to report availability from VariableX=NotUsed VariableY=Attribute name of custom property on the Make for Warranty Days VariableZ=Attribute name of the custom property on the Make for the cutoff $$$ you setup for each Make (min cost of items to be eligile for warranty. Canon for example might be $300, while Kyocera might be $150)
No	eautomate	128	Service manager might want a weekly list of closed calls to review for a specific type of work performed. To allow for maximum flexibility (yet work within practical limitations of having our alerts work for as many clients as possible) this alert will list all closed calls where the billcode on the call begins with the characters entered in variableW. As a rule, it is a best practice to use standards when you create any codes in your erp/crm solution so that the first few characters denote a commonality between them (ie. ITCharge, ITPhoneFix, ITHelpDesk, etc all denote IT work performed...so by selecting all billcodes that start with IT:...)	VariableW=the characters that the desired billcodes start with VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	129	A summary list of all orders / calls on-hold greater than variableW business hours.	VariableW=OnHold business hours exceed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	130		
No	eautomate	131	Please create the 'FMAudit' Equipment record in e-automate for the following accounts that have OnSite running:	
No	eautomate	133		

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	134	In most operations, sales reps are not paid their commission until the invoices for their deals are funded/paid. This alert is meant to keep the salesrep notified/engaged regarding past due invoices for their hardware sales. It select only invoices for sales orders using the e-automate type Equipment , and are past due more than the # of days (variableW) specified above where the past due amount exceeds variableX above. There are two alerts to this task, the first alert sends one email to the salesrep assigned to the invoice for all his/her past due invoices, and the second alert goes to the reps manager (the manager assigned to the salesrep employee record in e-automate) showing all past due invoices for his/her team.	VariableW=#of days past due to alert VariableX=PastDue Amount > $$$ VariableY=NotUsed VariableZ=NotUsed
No	eautomate	135	This is a package of custom tables & a stored procedure that should run each night to update the AR Analysis custom tables that are used by a number of our alerts. The variableW is used so that the ar statistics factor out invoices for customers that are billed to leasing companies. You should setup a customertype to identify on the customertype field the customers you setup for your leasing companies.	VariableW=Characters contained in the customertype assigned to your leasing company customers VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	136	This is a custom on-demand report only that must be integrated into your e-automate Custom Reports so that you can run it from within E-Automate as needed. The dynamics of multiple makes, etc make this not conducive to an automated process, therefore we install/integrate the report into e-automate for you.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	137	This is designed to let your technician know when a call they are dispatched to has additional equipment (at that customer location) missing meters. It appears to be standard practice to set the meter contact on equipment to indicate equipment that s/b monitored by one of the meter colletion systems (FMAudit, PrintFleet, etc) and use setup a contact called FMAudit for example. Some dealers handle the non reporting auto collection equipment with a different process and they wayt this particular event to report only equipment missing meters that are not audited by one of the meter capture solutions. If that's the case, enter in the Name of the metercontact contact you are assigning to all your auto-capture monitored equipment. You can choose customers to exclude from this alert by assigning the custom property (used in Variable X) and setting to 'Exclude'.	VariableW=MeterContact name on Equipment not to be included (FMAudit for example) VariableX=AttributeName for custom property assigned to Customers to be EXCLUDED from Alert VariableY=Not Used VariableZ=Not Used
No	eautomate	138	Similar to ID 41, with Custom Properties. For larger customers who have normal terms codes on invoices (30 day, 45 day, etc) but who traditionally pay later.	VariableW=Attribute name created for Customer Custom Property VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	139	Report of new customers created in last 24 hours for admin to review the key items (taxcode, terms, etc) for a new account added to e-automate. This version is built to run once at the end of the day of customers created in last 24 hours and deliver a pdf report with the pertinent information. This alert is an alternative to #82 (which is more of a realtime alert that runs every 15 minutes).	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	140	**Please download the pre-requisite doc for this alert!!** With many dealerships who are billing service through leasing companies there are issues with the leasing company failing to notify them of particular accounts that are not paying the service portion of the payment. The dealership continues to bill the customer contract in the system allowing the customer to receive service & supplies, sometimes for many months before the problem is identified. In order to stop the bleeding, a dealer requested that we create this alert to turn off the Bill Contract checkbox on any contract that was Active and had more than W (variableW above) outstanding invoices. This checkbox means the contract will no longer appear in the billing queue to be billed, and when the last invoices bill thru date passes then the equipment on that contract will no longer appear under contract for service or supplies and should come up as billable(assuming you have all your contract equipment set with a billable billing code on equipment records).	VariableW=# of unpaid invoices for a contract to trigger this alert VariableX=Name of Attribute custom property field setup to disable this alert for contracts where value of field set to YES VariableY=NotUsed VariableZ=NotUsed
No	eautomate	141	This task is required for all our customers as it is the main component for almost all service call related alerts. There are no messages created by this alert, it does however run every 15 minutes to updated the business elapsed times for all time related metrics on open calls (dispatched, onsite, onhold, etc).	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	142	This is a task that must run nightly to update the extended analysis table for closed service calls.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	143	If you have turned on the e-automate option to Require Departments (Tools-->Options--Company--Departments & Branches) then e-automate requires users to use Departments...however some of our clients report rare instances of behind the scenes transactions being posted to No Dept due to setup conditions on codes. So they asked that we create this alert to notify them when those rogue transactions occur so they can address them. This alert only checks accounts in your P&L account range	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	144	A flash report is a management report to show activity (# of & $$ Amount) on different transactional items. This report will show the # & $total by the user who created the transaction for each of the following transaction types (Equipment Invoices, Equipment Invoices Credit/Debits, Supply Invoices, Supply Invoices Credit/Debits, Contract Invoices, Contract Invoice Credit/Debits, Other Invoices, Other Invoices Credit/Debits, Vendor Invoices, Vendor Invoice Debit/Credits, Purchase Orders) For invoice types segmented into Equipment/Supply, the report uses the Sales Order type for the sales orders tied to the invoices. The sales order type must contain the phrase (Equipment) or the word (Supply).	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	148	Alerts Service Manager before an expensive part is ordered for a rescheduled call. This looks at the each price of the part to exceed variableW not the total cost of the qty for that item.	VariableW=Cost an item (each) must exceed to trigger this alert VariableX=NotUsed VariableX=NotUsed VariableX=NotUsed
No	eautomate	149	The alert runs at the end of each day and capture all contracts invoiced that day where the beginning meter and the ending meter on any of the equipment billed were both Estimated (using the Estimated flag) and generate a pdf report where each page of the file is a letter to be reviewed by the billing dept and sent to the customer when appropriate. By default it fires on two estimates (the start and end on the same invoice were both estimated) but you can specify 3 in variableW and it will then go back to the end meter on the previous invoice to determine if it was estimated as well. So the # of estimates are tied to the start/end meter on one invoice or if you specify 3 it also checks for end meter on previous billing invoice.	VariableW=print letter after 2 or after 3 consecutive estimates on invoice VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	150	This alert will run profitability analysis on all contracts and alert you on contracts with profit margin % below W% and contract revenue for last 24 months is > X. The reason for the X factor is to allow you to filter out contracts where the profit margin might be large as a percentage (-200% for example) but contract is a low volume contract of $120 a year. So you can use X to focus on your larger target problems first and then later change this value to see more contracts. VariableY is where you can create an attribute (Type = Number) to assign as a contract custom property and if a value exists on a contract we will use that number as the %Profit margin target vs. VariableW above. This allows you to have different target margins for specific contracts VariableZ is where you can create an attribute (Type = Yes/No) to assign as a contract custom property and if that value = [Always Report] then the alert will report that contract regardless of revenue or profit margin %. This is so you can set a contract to always report on the alert. We use Digital Gateways new Analytic Database. Profitability Margin is determined by (revenue over last 24 years rolling months) minus (supplycost + partscost + laborcost + othercost). In order to drive this alert, we will need to install/create DGI's tool set for you. These analytics won't be released to the general population till 4th quarter 2010, but we are getting some advance use to help ensure that the updates are working. We'll run the analytics in the de-normalized mode, which basically allocates the revenue (base & overage + any additional revenue) into the months covered on the contract invoices (typically next month on base...last month for overage) so that trending at the period (YYYYMM) can be accurate based upon when the revenue is earned vs. when it's billed. Alert 219 will fix a lot of typo issues that impact contract profits.	VariableW = Percent (as integer) for threshold profit margin below to trigger alert VariableX=Revenue for last 24 months exceeds (to filter out based upon total revenue, default is $30 per month or $720. VariableY=AttributeName on Contract custom properties to set target margin on individual contracts VariableZ=AttributeName on Contract custom properties to override margin target and always show contract on this alert. We suggest you tweak variables to keep the report around 30 pages.
No	eautomate	151	This Alert is meant to help analyze the meter sources (Fax/E-Info/Phone/FM Audit/Estimate/etc) used for Billed Meters for the last # of periods specified in Variable W above. This report analyzes all meter readings and segregates out analysis of readings used for billing.	VariableW=Periods Back from Current Period VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	153	Highlights meters where the meter source contains the word PHONE or the meter was estimated. Eventoutputid 151 is an analytic report of all meter sources for previous 6 months to compare how your billing meters are collected for invoicing but it doesn't show the equipment details. This alert is specifically to show the customer/equipment meter billings for the last week to allow you to determine problem accounts where you may need to install meter collection software etc. Typically this alert would be scheduled for every Friday at 5:30pm and will look at previous 7 days.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	154	This is a process for managing 24X7 service calls. This alert runs 24 hours a day 7 days a week every 15 minutes, will first alert email group entered in the custom property attribute field named in Variable W above. A second alert goes out X mins (VariableX) after call was received if not dispatched to email group in the custom property and any specific emails address in the ToAddress fields on the subscription . A third alert goes out Y mins after the call is received if still not dispatched, email goes to email group in custom property, all the ToAddresses and all the CCAddresses. Variable Z drives another alert if the call is dispatched but tech not arrived within Z minutes of the time the call was created, this dispatched but not arrived goes to everyone in the ToAddresses fields.	VariableW=Attribute Name used on the Equipment CustomProperty that will contain the group email address to alert for that piece of equipment OR set at the customer level for all equipment at that customer location VariableX=2ndAlertMi nutes VariableY=3rdAlertMin utes
No	eautomate	155	When taking equipment under contract that has not been covered one of your contracts previously, it is typical to inspect the equipment first and bring it up to spec before the contract goes into effect. And for some dealerships, when a customer terminates a contract they want to send a tech out for a final call to pickup any extra toner/supplies that might have been stockpiled by the customer. In both of these cases, the contract/supply dept needs to be notified so they can activate / deactivate the contract once the appropriate call type has been closed. VariableW is where you enter in the calltype for your Contract Inspection call(taking new equipment under contract), and VariableX is where you enter the calltype for your Contract Termination call. The ToAddress information is typically your contract administrator(s), and we typically recommend that you have setup a mail group for your contract admins, or at a minimum for your admin billing dept and send these types of alerts to that group vs. hardcoding in specific users names. This task will run at 5:30 pm for all calls for the select call types for that day.	VariableW=Problem Code Call Type used for contract inspection VariableX=Problem Code Call type for contract termination call VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	156	Making ex-customers inactive. E-Automate is a true relational database, and therefore deleting any records once they have been used in any context in the system is not possible as this would impact the integrity of the database and your historical reports. So E-automate has the Active checkbox at the bottom of most records and this checkbox controls the visibility of that record (customer, item, code, etc) in the drop down lists in e-automate. We check to see if the customer is still Active by seeing if any of the following conditions are true: Check to see if customer is assigned as the Customer on any active equipment OR Is Customer location on any Active Equipment OR Any Sales Orders for this Customer in last VARIABLEW months OR Any Sales Orders where Customer was Bill To in last VARIABLEW months OR Any Sales Orders where Customer was Ship To in last VARIABLEW months OR Customer had any ARInvoice activity in last VARIABLEW months OR Customer was the BillTo on any ARInvoice activity in last VARIABLEW months OR Customer was the ShipTo on any ARInvoice activity in last VARIABLEW months OR Customer has any open SalesOrders, UnAppliedAR, or open AR Balance OR Customer is the BillTo on any Active Service Contracts If NONE of the above are true then the program assumes the customer is no longer active..and will un-check the active box for the customer. See ID=157 for making equipment inactive. Note in comments if you want us to run this in test mode the 1st time.	VariableW=Number of Months with no invoicing to flag inactive VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	157	NOTE: THIS ALERT IS NOT FOR ANY CLIENT WHO HAS BEEN ON E-AUTOMATE FOR A TIME SHORTER THAN ANY OF THE PERIODS SPECIFIED IN THE VARIABLES ! ! (In other words if you've been on e-automate less than 18 months at a minimum then do not subscribe to this event) This task process is to run thru and inactivate Equipment records in e-automate that do not meet all of the following criteria: 1) Install date has to be more the VARIABLEW years ago. If there is no install date we look at the equipmentrecord CREATEDATE (the date you created the record in eautomate) AND 2) Equipment not on an Active Contract AND 3) Equipment not on an Active Lease AND 4) No Service in last VARIABLEX months AND 5) No Supplies shipped in last VARIABLEY months AND 6) No Meterreadings received in last VARIABLEZ months AND 7) Equipment Not In-Stock (inventory) See ID=156 for making customers inactive. Note in comments if you want us to run this in test mode the 1st time.	VariableW= greater than # of Years from installation/createdate date VariableX=No Service in last X months VariableY=No Supplies shipped in last Y months VariableZ=# Months since last meter reading
No	eautomate	158	Some of our clients want to use BillingGroups on all contracts as a way to create batch groups (Week 1, Week 2, Week 3, etc...or US BanCorp..). So if users do not populate that billing Group field (on the Contracts Billing/Contact tab) then mgmnt wants to be alerted. This alert will report at the end of each day.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	160	We have clients who have some issues with contracts not being setup correctly for Meters, this alert checks contracts where the actual billing code (not the billing code description) contains the characters in VariableW, and then report any of those contracts where there is no meter group, or there is a meter group with 0 rate, or there is no overage billing cycle. If you entered the characters SI in VariableW above, then the alert will check all contracts where the billing code contains the characters SI. Individual contracts can be excluded with VariableX. This alert will repeat every time it runs until the reported contract meter group issues are corrected, and it runs once a day typically at 4:30.	VariableW=the characters contained in the contract BillingCodes you want to validate VariableX=AttributeName for custom property assigned to Contracts to be EXCLUDED from Alert VariableY=NotUsed VariableZ=NotUsed
No	eautomate	161	We will install our custom report for you to be able to run your dead inventory check from within e-automate on-demand and change the parameters each time you run it.	

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	162	Client wanted to alert their techs when a CM Category call type assigned to them is still pending VariableW hours after the call was created (to send to tech, please put the word TECHNICIAN in the ToAddress1 field). and this alert goes only to everyone in all the ToAddress fields (not the CCAddress). Then, the client wanted an escalated alert to be sent to dispatch when a call is VariableX hours from create date . These set of alerts will only trigger ONCE for each call...so it will NOT repeat the same call# over and over . It's meant to just alert the tech one time for each call and not spam them. Then at variableX hours past create date it goes only to everyone in the CCAddressFields.	VariableW=Hours from create DateTime and Status Pending to be sent to all ToAddresss VariableX=Hours from create Date status pending to be sent to all CCAddresss VariableY=NotUsed VariableZ=NotUsed
No	eautomate	163	This alert is for clients who utilize Sales order status, order types, and even Notes on sales orders and want to keep their salesreps notified of current status on their equipment orders. So the alert finds all orders that are not (Canceled or FulFilled) where the order type begins with the characters you enter in VariableW, and reports back the OrderNumber, Status, OnHold Code (if applicable), Date released Off Hold (if applicable), $$amount, and if you are using the Notes on sales orders (little yellow sticky icon) to enter in text regarding the current status (Waiting DNA, Waiting Lease Approval, etc) we will include those the date/creator and note for the last note entered on the Sales Order. This is meant to be only the reps Open orders, and should not be confused as an alert to be a complete reporting of all fulfilled/billed orders for a period. It's strictly Open Uninvoiced orders so reps know the status of their uninvoiced orders. You should provide a ToAddress2 and CCAddress2 so that we have valid email addresses in the event that you do not have email addresses setup for the sales rep and their manager (as associated in e-automate). You may also specify up to three custom property attributes from the salesorder to include on the alert. Specify those attribute names in VariableX/VariableY/VariableZ as needed.	VariableW=Character String to use for select orders where OrderType begins with the characters you enter here (ex: Equip) VariableX=CustomPropertyAttributeName to include on alert VariableY=CustomPropertyAttributeName to include on alert VariableZ=CustomPropertyAttributeName to include on alert
No	eautomate	164	E-automate currently only supports a callback flag using # of days since last Corrective/Preventative maintenance call. This does not work well for high volume units and is insufficient to accurately use the CallBack flag on service calls for any bonus programs. So we've created a task that will allow you to set a target CopiesBetweenCall value for each model as a 2nd level callback check that will in effect work with the DaysBetweenCalls to reset the callback flag on calls based upon the call meeting both values. Note: DGI has plans to incorporate Clicks Between Calls as a callback parameter in the next release for end of year 2010.	VariableW=AttributeName created and assigned to Model Custom Properties that will contain the CBC callback Value for each model. VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	165	This alert is to be used in conjunction with surveys you might want to send out on Sales Orders. We must have valid contact records with email in e-automate associated to your sales orders to enable surveys. So this alert will notify the designated users whenever a sales order is created but a contact record is not associated so that the sales order can be corrected. http://bit.ly/cEXfXE	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	166	We alerts 53 (Service Manager Alert) and 54 (Customers Helpdesk Alert) that sends a notice to the salesrep on the account everytime a service call is placed and closed for those Customer Records and/or specific equipment records. You turn on/off the custom property on the Customer (alerts go out for all calls for that customer) or on the equipment (alert only for specific equipment.	VariableW=AttributeName for custom property you will assign to Customers & Equipment custom property configurations VariableX=NotUsed VariableW=NotUsed VariableZ=NotUsed
No	eautomate	168	To provide an alert so inventory/service can review new models that are created to insure all the data is correct.	VariableW=Set to Yes if you want to show new Hosts & Accessories, set to No if you only want to see new Hosts models created VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	169	To identify when changes have been made to the following critical item components: Item, Description,Model, Make, Categoryid, Serialized, InventoryCodeid, ExpenseCodeid, SalesCodeid, ServiceCodeid, Yield, EquipmentCodeID, Tax, Cost, DefaultPrice, Active, UseBaseOutCost, BaseOutCost, OutCostGroupid, PrefVendorid, IsReturnable, E-Info Enabled	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	171	To report all Active Host equipment records that have the designated technician as UnAssigned or Default .	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	172	A check to see which technicians are missing in action at 8.30AM and 4PM and send a message to the missing tech and their manager. This alert runs a Tech Status report showing techs either (Dispatched, OnSite, Unavailable, or MIA [missing in action]) and incorporates the employee Unavailable component within e-automate. If you put the word TECHNICIAN in VariableX, then an individual alert is sent only to the tech and his/her manager regardless of the To/CC addresses if they are deemed MIA (not dispatched and/or not onsite and Available). The To/CC addresses will receive only the summary status board of all techs showing their status as dispatched/arrived/unavailable/MIA This alert only runs on technicians where you have set the custom property attribute defined in VariableW above to Yes . This is meant to run at specific times you indicate in the comments below when you expect all your techs to be dispatched or onsite (typically 8:30 and 4:00) Please indicate in the comments the time(s) of day you want this status event to run, tech is MIA if not dispatched OR onsite or does not have a time entry in the unavailable time sheet	VariableW=Attrbute Name that flags Technician (Employee Custom Properties) as Field Tech (ZCJFieldTech for example). VariableX=TECHNICIAN (for alert) VariableY=NotUsed VariableZ=NotUsed
No	eautomate	173	If users are not careful and are doing a negative qty (trade-in, even exchange, etc) on a sales order the returned serialized items are brought back into inventory at their original cost. 75% of the time that is way overstated b/c the item may have been sold over a year ago, sometimes 2 or 3 years ago. This is a daily alert showing the serialized items that were pushed back into inventory thru a negative qty on a sales order so you can validate that the item was brought in at the correct cost. This alert ignores inventory updates thru voided invoices b/c typically invoices are voided only so they can be corrected and rebilled.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	174	This alert is an audit log of changes to existing contract headers meter groups and contract equipment changes...a separate email is sent for each audit report (Headers / meter information /Equipment) on the following fields: It lists New and Updates. For equipment it lists New / New Instances / Terminations / Updates.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	175		
No	eautomate	176	The experience of your customers within the first 30-60 days is critical to setting the tone of the relationship for the next year or so. Most of the time it's not that there was a service call, but how quick did you respond and what actions you take to make it right. In light of that we have build this alert to notify the technician & the salesrep (and the all the ToAddresss in the subscription) when a new call is opened within the days specified in variableW of install date. Then, when the call is closed, the sales rep and all the CCAddresss are notifed.	VariableW=# of Days from Install VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	177	An issue for a lot of our clients is keeping track of equipment picked up to be returned to leasing company, especially if we're picking up the equipment to hold for an extended period. What we recommend is a process using the equipment history tracking, custom attributes, and to populate two custom attributes you create and assign to your Equipment Records. See the attached documentation for specifics on this alert.	VariableW=Character string contained in all the EquipmentStatus code(s) you will assign to equipment to be returned to lease VariableX=Name of Custom Configuration Group created to contain all the custom attributes you created for this process VariableY=AttributeName you created and assigned to the group above that tracks the leasing company to return the equipment backto VariableZ=AttributeName you created and assigned to the group above that tracks the date the equipment is due to be returned
No	eautomate	179	Clients have asked us to create another task to override the customers placed on hold by the e-agent past due task when we identify that the only past due amount(s) are comprised of finance charge invoices. This task uses the same parameters as the E-Agent Task except we exlude finance charges invoices from the Past Due calculation. If this task identifies customers on Credit Hold where the past due amount excluding finance charge invoices is = 0, this task releases those accounts from OnHold.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	180	One of our clients had a few high profile customers where they wanted to see all the open calls every morning for, and they wanted to bring these to the field supervisors (technicians managers) as well. So this task will report all the open calls for any customer with the Custom Property attribute set to Yes (as you define in VariableW of the subscription). It will send one email to each supervisor showing all their techs opens calls for the specified accounts, and then one email of ALL calls for all accounts flagged to the To/CC addresses specified in the alert subscription.	VariableW=CustomProperty attributename you created to flag as major account for this alert VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	181	Do you have customers complaining that they had to call in multiple times to get a response, or is dispatch/techs spending too much time calling customers with updates? This alert will send an email confirming the call has been entered. When the tech is dispatched it will email again saying the tech is on their way and telling you who the tech is. Once the call is marked complete we email saying "in case you missed them" and let them know if there is a reschedule. We also email if the call is canceled. Optionally, we can send a final email when the call is invoiced. Customers seem to really like this, especially knowing who is coming and may even greet your tech by their 1st name. We email the person who placed the call not the equipment contact. Use alert 87 to ensure Dispatch is getting an email address. If you have a HelpDesk situation use alert 54 where we always email HelpDesk regardless of who placed the call. You can default this alert on for all customer and then chose who to exclude, or just turn it on for specific customers.	VariableW=AttributeName for custom property assigned to Customers to be EXCLUDED from Alert VariableX=AttributeName for category assigned to individual contacts to be EXCLUDED from Alert VariableY=enter ALL to send to all customers by default EXCEPT customer disabled in custom properties, enter SELECTED to send ONLY to customers you've turned on in custom properties. VariableZ=Include/Exclude the call remarks on the closed call email
No	eautomate	182	To help you monitor your AR Persons collection activity and see that they are keeping on top of their tasks. Ensure the AR person is completing their tasks and not just leaving them open.	VariableW=# of Days Past due to select VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	183	When we look at the survey responses our clients get, one of the biggest complaints is a lack of communication. Even if the tech has bad news, better to call and give bad news than no call. If your tech is communicating effectively your customers will always be kept updated and not have to call in. This alert is triggered when a customer calls in for an update and does 3 things. It emails the tech so they can call, it copies the tech's manager and it keeps a record in e-Automate so you can see how often it happens.	VariableW=Notetype you created in e-automate to identify as ETA Request VariableX=NotUsed VariableY=NotUsed VariableZ=Tech Notification Method (must be "text", "email" or "none")
No	eautomate	186	This is a slight variation on the Dead inventory report alert we have built. This alert checks for items in your Field Techs carstock warehouse where an item has a MinQty level > 0, but the tech has no qty on hand for that item. You must create an attribute (if you havn't already for other alerts) that is a Yes/No type, and assigned to the employees custom property configuration to indicate that an employee is a field tech so we know to report on only employees warehouses where the customer property is set to YES. The report goes to the tech, their manager, and whomever else you specifiy in the To/CC addresses on the subscription and shows the item, description, minstock level, maxstock level, and last time item was used from that warehouse on a service invoice.	VariableW=Attribute name assigned to employee file Custom Properties indicating employee is a Field Tech VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	187	During the life cycle of a particular model the mfg will release tech bulletins stating that all machines in the field before s/n XXXXX for example will require Part# 888888 to be replaced/retrofitted/modified etc, and or a mandatory firmware update be installed. Since you need to track a) what equipment needs the update/mod/part (and the item required) and b) when the item is replaced. You will need to create an attibute that is a lookup on inventory items, another attribute that is DateTime Type and assign both to the Equipment Custom Properties. Then on the serial#'s requiring action, in the custom properties assign the item from inventory appropriate to the action. We will display in the alert the Call# / model/serial#/ equipmentnumber / customername /technician / and the notes/comments you put in the attribute Custom property defined in VariableY. When we see a service call completed that used the item specified in VariableW after the daterequired in VariableX we will blank out the value for the variableW and VariableX and VariableY custom properties for that serial# and create a note equipment. Please download the attached Relevant document on this alert for detailed instructions on the setup and execution of this process	VariableW=Attribute name created and assigned to Equipment Custom Properties for this alert VariableX=Attribute name (DateTime Type) for alert start date (so we know from at which point in time we need to watch for the item in VariableW to have been installed so we can disable the alert for each particular serial# as the work is done. VariableY=Attribute name setup to contain any special instructions to send along with alert VariableX=NotUsed
No	eautomate	188	Complement to 109 survey which is a big hit and most clients want to survey as many customers as possible. We can only send surveys if email addresses are entered. This is a daily report that shows a count/list of Customers where you got email, Customers who declined to give emails and Customers where you did not get emails. We also show who the "Creator" was so you can see who is effective at getting email.	VariableW=# Business Days you want to wait after a call is closed to send the followup/survey VariableX=AttributeName for Custom properties on Customers to disable all survey emails VariableY=Contact Category assigned to specific contacts who wish to opt-out of all surveys. VariableZ=NotUsed
No	eautomate	189	This alert is to show any part that has an average cost over Variable W but no yield has been set. Use this with alert 90, Parts below yield.	VariableW = ItemCost exceeding VariableX = NotUsed VariableY = NotUsed VariableZ = NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	190	When your exporting reports/eviews/queries that have inventory item descriptions that contain commas or quote marks, the export column alignment is thrown off. So it is a good practice to not use commas or single quote marks in your data if your going to be exporting the data to excel csv (comma delimited) files. This subscriptions directs us to install a simple stored procedure to run daily to strip out of your inventory item descriptions commas and single quote marks. This procedure is not needed for all clients of course, but we did have a few where the commas and quotes were causing enough problems to warrant addressing the issue.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	193	This is a variation of 129 All OnHold Sales orders and Service Calls..but this is just All Service Calls on hold for whatever reason that are on hold for > VariableW hours (business hours)	VariableW=OnHold > W business hours VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	194	Clients want to be notified of any accessories sold today that were not assigned/attached to a host equipment. This alert is predicated on you having equipmentCodes assigned to your Accessory Items so that they create equipment records. This alert checks the model assigned to the item where the Accessory checkbox is checked on the model	VariableW=NotUsed VariableY=NotUsed VariableX=NotUsed VariableZ=NotUsed
No	eautomate	195	We have some clients who use Customer Site warehouses extensively, and typically a specific technician is associated with that customer warehouse. E-automate of course only supports assigning one warehouse to a technician, so to allow for a warehouse activity report for all warehouses a tech works with we had to setup a new attribute (Lookup on Employee File), and then assign that attribute to the Warehouse Custom Properties. So this version of Warehouse Activity will take the warehouse assigned to the technician in the employee file and also all Customer Site warehouse types where the custom property has the same technician assigned to print a warehouse activity report from all those warehouses. However this report is warehouse activity and not Technician specific so it will report all activity from any of those warehouse regardless of the technician who might have used/transferred any item/qty in/out of any of those warehouses. This report will also only run for employee/techicians where the custom property on the employee file designated in VariableX above is set to YES. This custom property is meant to designate an employee/tech as a FieldTech and is used in other alerts as well to filter out shop/truck/connectivity etc techs from traditional field techs.	VariableW=Attribute name assigned to the Warehouse custom properties containing the employee number associated with the customer site warehouse VariableX=Custom Property attributename associated with employee file to designate employee as FieldTech. VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	197	This is a sanity check alert much like the online tolerance in e-info where we report any meters where the most recent meter reading is greater than the previous meter reading times Variable W%. This alert only checks meters set to Valid for Billing. See 278 for Estimated meters used on contract invoices.	VariableW=Enter Percentage of previous meter you want to be notified to check for validity (for example 20% check would be entered as 1.2 in this spot) VariableX=Minimum meter before checking percentage increase VariableY=NotUsed VariableZ=NotUsed
No	eautomate	198	Some clients allow their inventory quantities to fall below zero (some use this to drive a restock flag for example in customer site warehouses). They have asked for an alert to run that will notify them of any warehouse/Bin with qty < 0.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	199	Client wants to review all StockMin & StockMax changes to warehouse item records. They also wanted to know whenever the effective qty (qtyonhand + ordered - allocated) exceeds the stockmax where stockmax > 0. This one alert checks all three statuses for each warehouse/item and reports what triggered the item on the report (change to max, change to min, qty > max).	VariableW=Flag to include/exclude qty > stockmax on report [Exclude or Include as value] VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	200	To send an email to the contact associated with the sales order once the package tracking information is entered in the Sales Order Shipment records in e-automate. This process requires your order entry personnel to assign (and create if contact does not exist) a contact with a valid email address from the e-automate contact records. Use ID 165 to ensure you capture emails with sales order entry. Use alert 216 to let your customers know there order has been created. You need to create an attribute for customer custom properties and it needs to be a User-Defined Lookup with the lookup list choices Enabled Disabled. This alert will not go to any customer with this custom property (VariableW) set to Disabled. Also create a contact category and if you want to optout individual contacts assign them this same contact category (VariableY).	VariableW=Attribute name for custom property associated with customer to disable shipment confirmation for all customer contacts VariableX=NotUsed VariableY=OptOut Contact category associated to the contact to not send them the entry/shipment confirmation. VariableZ=NotUsed
No	eautomate	201	This alert shows if there are any items on an Equipment type sales order that has been cancelled.	
No	eautomate	202	This is designed to automatically terminate contracts that do not have an overage billing cycle. For example, faxes and shredders do not have meters and e-automate will not terminate these contracts when they are renewed.	VariableW=Not Used VariableX=Not Used VariableY=Not Used VariableZ=Not Used

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	203	To report active contracts where there are overages unbilled and more than VariableW days past their next overage billing date. If you want to see only pastdue overagebillings you would use a negative number in VariableW for how many days past due you want to include. If your using this to see the contracts that need overagebilling up to the next VariableW days in the future then put in a positive number. Negative number is only pastdue and a positive value is pastdue + whats coming up that many days in the future as well.	VariableW=List contracts where overagenextbilling date < Today + VariableW Number of days (use a negative number here if you only want to see past due.....use a positive number if you want to include future billings due) VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	211	To notify your A/R department of customers who's only past due balance are finance charge invoices.	VariableW=NotUsed VariableW=NotUsed VariableW=NotUsed VariableW=NotUsed
No	eautomate	212	To pull Salesrep outcost from e-automate and push into Compass price level 1.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	213	This is a collection letter/email to send to customers with past due balances. The alert will first select customers that have an AR Contact record associated with the account and that contact preferred method is email. Then for all other past due accounts (no AR contact or AR Contact preferred contact method is not email) the alert will then forward a pdf file to be printed and mailed to customer. You should indicate in the default message block above the verbiage you would like us to include in the email. Also this alert is set to run on the 1st and the 16th of each month but it will only send one ministatement per emailed customer per cycle. So if a customer is past due on the 1st and again on the 16th they will only receive the alert on the 1st. If they are still past due on the NEXT 1st of the month they will get a new email. The X & Y variables are to set a range so there can be a different alert to escalate (in other words if customer has a balance in the 30 to 60 days aging bucket and nothing over 60 days we send the first level notice/letter. But if there is a balance over 60 then this sends a different notice/letter with stronger verbiage if you so chose. If you only want to have one alert set VariableY to 99999 and the second alert will not go out. Add alert 387 to catch missing AR contact.	VariableW=Min Balance Pastdue > $$$ VariableX=#Days bucket for balance due (must be 30, 60 or 90) VariableY=#Days Bucket balance older than (must be 60, 90, 120) to send escalated notice (different verbiage) VariableZ=Filter out customers with Customer Type beginning with

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	214	Many clients use the dispatch module for deliveries and pickup of equipment. If you are using dispatch in this way, you should have certain CallTypes setup for the different delivery/pickup options (Install...Demo Install...Pickup Return To Lease..etc). Whatever calltypes you setup to use for your deliveries, you MUST be sure that you assign the Category Install/Pickup to those calltypes so that our alerts & e-automates reports know that calls assigned to those calltypes should not impact response times and can be filtered out of service metric reports. This alert will trigger of all calls assigned to a calltype that is in turn assigned to the Install/Pickup calltype category. You can check this by editing your Call Types from List and Codes / Call types.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	215	We have seen situations where a customer places a toner order online, then calls it in and so does their colleague and you ship 3 sets of toners in one day.

This alert is to just raise a flag whenever a supply order is created where the item ordered for a particular equipment id had been previously ordered for the same equipment in the past Variable W days you specify. We will also factor the # of days between last order against daily click average (based on 3 month average) against the item expected yield and report if item appears to have not met yield.

Due to MPS support we also check to see if the same Item was shipped to the same location (not just the exact same equipmentnumber) and the alert differentiates in the message what is suspect (EquipmentNumber/Item) or (Location/Item).

We check all order types containing the string "Supp" by default. You can specify a different string in VariableX if you only want us to check a specific order type.

Use alert 315 to check for equipment using excessive toner. | VariableW=# of days back to check for same supply item on same equipment that was shipped VariableX=Order type containing this string VariableY=NotUsed VariableZ=NotUsed |
| No | eautomate | 216 | To send a confirmation when a new sales order record is created in e-automate to the contact person on the sales order (must be contact record selected/created from the contacts in e-automate with a valid email address) This alert should be combined with the missing contact assigned to sales order alert (165) so you can catch sales orders where users are not associating contacts properly. Use alert 200 to email the tracking information. | VariableW=AttributeName for Custom properties on Customers to disable sending the entry/shipment confirmation. VariableX=Contact category assigned to contacts to optout individual contacts from this alert VariableY=NotUsed VariableZ=NotUsed |

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	217	EventoutputID 181 is set to send an email to the call contact person anytime a call is opened / dispatched / closed. Some clients want to use 181 for all clients except those who optout. Others want the opposite (only turn on for customer tho OPTIN). This alert will take the Yes/No answer on the indicated survey and Question# (VariableW and VariableX) and turn on/off the customers subscription to 181. You'll need to create a new Attribute (yes/no type) and assign that attribute to the Customer Configuration, and enter that attributename in VariableY of this alert.	VariableW=Surveyid to monitor VariableX=Question# to monitor (must be a Yes/No question and Yes indicates to subscribe the survey contact/customer to 181 VariableY=AttributeName assigned to customer custom properties to turn on/off 181 alert for customer VariableZ=NotUsed
No	eautomate	218	To alert specified users of all unreceived purchase orders > then # of days specified in VariableW	VariableW=# of Days (Greater than or equal to) unreceived VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	219	This alert is meant to catch where either users ignored the popup warnings for these values you setup in Tools/Options/ServiceCalls/Additional Options OR you do not have any values setup for the popup warnings. We will alert you if an invoiced call exceeds any of the numbers you input for the corresponding values above.	VariableW=# of hours for Response VariableX=# of hours for Travel VariableY=# of hours for Labor VariableZ=# of miles for mileage
No	eautomate	220	To send a followup email regarding supply orders (order type contains the characters suppl) to survey customer as to the accuracy of the supply order	VariableW=Days to wait after sales order is fulfilled VariableX=custom property name to Opt Out Customer VariableY=Contact category name to opt out single Contact. VariableZ=Name of Order Type (Actual name of order type, not description) for Supply orders
No	eautomate	221	This is to notify you of e-automate users who's login id's are not linked to employee records in e-automate. This linking is necessary for any of our alerts to be sent to TOCREATOR (the creator of the transaction). The database stores the userid who created/modified a transaction and we have to take that userid and do a crosslookup to the employee file to find the email address for the creator. So all your e-automate users must be linked to a corresponding employee record in e-automate. This will also tell you about users with no email address.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	222	This alert is to send a list of any Active Host equipment that is not in inventory and has not had a service call within the last # of days specified in VariableW above.	VariableW=# of days back to check for service call VariableX=Not Used VariableY=Not Used VariableZ=Not Used
No	eautomate	223	To alert service manager / management of either ALL Corrective Maintenance calls (or one specfic calltype code you want checked) that missed the DueTime for today. to notify for ALL CM calls that went past duetime enter ALL in variableW. To check only one specific calltype enter in the actual calltype code (not the description of the calltype but the actual code as it is setup) in variableW. Example of this is where you might have many CM calltypes but your only interested in tracking the number of missed due times on Inoperable/Down machines and are using a specific calltype to indiate the equipment is inoperable. DateTime due in e-automate defaults to the response times youve setup for the equipment/contract and this alert shows where that time was missed	VariableW=Enter ALL for all calltypes or enter the specific calltype code (not call type description but the actual code) to check VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	225	To list the equipment population assigned to a technician in the equipment record. Will show model/serial#/equip# /location address as well as last 3mo last 6mo average monthly volume and total calls/parts by model and by each serial#.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	227	A lot of dealerships use the dispatching module of e-automate to track deliveries and pickups of equipment. There are some specific setup options that need to be accomplised to facilitate this w/o the delivery calls impacting service call metrics. The most critical is making sure your calltypes setup are assigned to the IR (Install) call type category. Next, because you cannot assign a sales rep to a service call,this alert requires that you setup your salesreps as contacts of your internal e-automate customer (branch) record, and that you create a job for each sales rep as well (assigning the corrsponding rep to the appropriate job). All that setup is so you can assign a job to a service call and thru that job/contact association we can determine the sales rep to send notifications regarding deliveries and pickups.	VariableW=Character string contained in all the TRUCK employees employeenumber you setup in e-automate as technicians VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	228	To use the power of e-automates contract item usage alert in an interactive check against new sales orders entered.	VariableW=Minimum qty used of a supply item on a contract group before it should be considered VariableX=Alert when actual/expected meter usage is X % VariableY=indicate with symbol (< or >) whether the alert is % > or % < VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	230	This alert is obsolete. Use 316 instead.

For the e-automate contract/item usage e-agent to work properly, you must have your supply items covered under a contract set so that they will be factored into the contracts item usage checks, and you need to have a yield setup. This alert checks the item description and selects only items where the description contains the word (toner) or the characters (tnr). Note this is for the eAgent Contract Usage Limits which is similar to alert ID315. | VariableW=characters contained in the SalesCode assigned to supply items VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed |
No	eautomate	231	When we are servicing ship-in equipment for another dealership, as a courtesy we need to let them know when we are using a part(s) over a certain cost. This alert was built to work from contracts where the dealership created a salesrep (rep# ITT...Interterritorial) to assign to contracts so they would know the contract was not an internal contract. So if you want to use this process you should create a salesrep to use and in VariableW below you put in that reps salesrep number (employeenumber). This alert will notify you whenever a call is closed and a part(s) cost exceeded VariableX and will include the BillTo name/address from the contract as that should be set to the InterTerritorial Dealership customer account you created in eautomate.	VariableW=SalesRep agentnumber assigned to the Service Contract for the interterritorial contract VariableX=Cost of part exceeds (enter number only...do not include$) VariableY=NotUsed VariableZ=NotUsed
No	eautomate	233		VariableW=Min Balance Pastdue > $$$ VariableX=#Days bucket for balance due (must be 30, 60 or 90) VariableY=#Days Bucket balance not older than (must be 60, 90, 120, 99999) VariableZ=NotUsed
No	eautomate	234	This is a process meant to ensure that at the end of a Rental contract period the equipment is picked up from the customer. So the process is that whenever a Rental is placed in the field, a contract is created to bill that rental fee, and a service call is scheduled for the rental ending date with the specified calltype so that we know the equipment will be picked up at the end of the agreement.	VariableW=Characters to search contained in your ContractType code for your Rental Contracts VariableX=Calltype used to indicate pickup of Rental VariableY=NotUsed VariableX=NotUsed
No	eautomate	239	Client wanted to get a predictive alert of contracts with meter overage billing dates within the next 10 days (VariableW) where they had PrintFleet (they created an attribute custom property (VariableX)) designated as the collection method on each equipment record so they could validate that Printfleet was operating correctly at the account.	VariableW=# of days added to date of alert to pull contracts with next overage billing date less than VariableX=Attribute Name of custom property on the equipment to select VariableY=Not Used VariableZ=Not Used

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	245	This alert requires that you have e-automates contract analytics module installed. From those tables, we create a custom eview for the last 3 rolling quarters and last 2 rolling years for margin % & $$. Then we use that as a basis to alert for contracts expiring within VariableW months where the last 3 Quarters margin% falls below variableX. One thing we have found consistent is due to errors with odometer readings/mileage if you include the travel costs your going to have a significant chance of error when calls are pulled in with hundreds of thousands of miles on a single call. So VariableY can be set so that the travel costs are not factored into the margin for the basis of this alert so that those huge errors are eliminated.	VariableW=# of Months for contracts expiring within VariableX=% margin threshold across last 3 rolling Quarters (include only contracts where margin is below threshhold) VariableZ=Yes/No (include travel costs) VariableX=Not Used
No	eautomate	246	Aging List of all open supply sales order types that are unfulfilled > VariableW days and also all e-info quotes not converted to sales orders so management can easily see how long orders might be on backorder, etc.	VariableW=# of Days Unfilled Supply Orders VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	247	This is a subreport from our Technician productivity custom report in e-automate. It details out for a technician the callbacks that were charged against him/her for the previous week. Typically this report would run on monday morning for previous week.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	248	To install into e-automate a custom report that can be used for customer review process showing volume trends by location / equipment with equipment details.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	249	To run a dead inventory report based upon a specific warehouse for usage only within that warehouse.	Not an automated report, install into E-Automate as a custom report only.
No	eautomate	251	Digital Gateway provides a very powerful PO Processing/Receiving tool to electronically transmit and receive orders with certain vendors. However, they do not have integration with all possible vendors so this alert was built to run on a schedule and send to the email address on the vendors record for POOrderTypes specified in VariableW above. Will email a PO.Pdf for the purchase orders created since last time this event ran. You should have the LOCK After Print option setup on your system tools so that this alert will lock the POs from further edit.	VariableW=POOrderType Code assigned to POs to send VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	252	To check all active metered contract equipment and alert if the equipment is missing a meter contact. OR if the meter contact is set and email is preferred method then alert if the UseAutomatic Meter Reading Request is NOT checked on the equipment. OR if the equipment meter is not set for RequireMeterReading. This is to help you ensure that you have meter contacts setup and associated for all your contract metered equipment and also that when an email is provided you have that equipment set to be incorporated in eautomates automated meter reading requests. If there are no meter groups on the contract at all then this alert will ignore that contract entirely	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	253	This is an alert we built for a client on a custom Sales Order Status report that they paid DGI to write. Therefore we cannot offer it to everyone. However we had already built our own sales order status report and it is Eventoutputid 163.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	255	Client needs to be sure that all contracts have a salesrep assigned so that their commissions will be paid correctly. This alert sweeps thru once a day and alerts for any active contracts missing a salesrep. It will repeat each day until a salesrep is assigned to the contract.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	256	To alert your subscribers (or the salesrep assigned to the contract) whenever the rolling last 3 months overages are W% above the base for that same period. Also we check to see if the total actual contract clicks for the last 3 rolling months is < or > X% of the previous 3 months. The idea is to look for any sudden shift in overages or volume for the last 3 rolling months. THIS ALERT REQUIRES THAT YOU HAVE DGI CONTRACT ANALYTICS INSTALLED. Now comes the sticky part. A lot of our clients are using 3rd party CRM systems and they keep the current salesrep / account assignments accurate in those external systems and do not update e-automate with the actual salesrep. So for those clients who do not want to update the sales rep on the account in e-automate with the actual salesrep we will create a custom property field and if your 3rd party solution is in a SQL database on your servers we will create a script to populate this custom property field nightly with the account/rep assignments from your CRM solution. Then this alert will work to send to whatever rep name in that custom property you identify in VariableY above. If you put the word CUSTOMER in variableY above, that tells us to use the sales rep you have assigned in e-automates inteface on the account.	VariableW=number to use as the target percentage to flag contracts where the overage clicks were W% over the base allowed VariableX=number to use as target % to flag if last 3 months volume > or < X% of previous 3 months volume VariableY=Attribute Name (or the word CUSTOMER) of the attribute you created as a custom property to hold the salesrep assignment for this account external to the actual salesrep field on the customer account. VariableZ=NotUsed
No	eautomate	257	Some contracts have a termination code assigned to them but they are still showing as Active and/or there is no terminated date associated with the termination code. There should be no Active contracts that have a termination code assigned so the contracts listed either need to be inactivated if they are truly terminated or the termination code needs to be removed if the contract should truly be active.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	258	This is a report for reps to use to do account reviews with their customers. It will show the BW/Color/Total click volume by location of equipment at the time of billing. It will also include # of service calls, and response time, and optionally when you run the report you can include uptime as a pct of total time elapsed in report vs. the total time to resolve the call (from open datetime until last rescheduled call (if rescheduled) is completed).	VariableW=Attribute Name for custom property associated to a customer for the Next Review Date VariableX=# of Days that you want to use between the Review report VariableY=Not Used VariableX=Not Used
No	eautomate	259	To notify a tech when a call is opened/closed on a piece of equipment that is assigned to them, but the call is being handled by another technician.	VariableW=NotUsed VariableY=NotUsed VariableX=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	260	To send a notice to the technician that a new call has just been placed on their board. This works by checking for calls status Pending and alerts the tech assigned to the call once. We memorize the call/tech as the unique key so if the call is reassigned to a new tech but still pending the alert should notify the new tech once.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	261	To notify on contracts that have missing base and/or meter rate schedule increases. Non-repeating alert will tell you once for a contract but will not repeat the notice on the contract if no action is taken. Alert checks contracts starting a # of months back equal to VariableW (or more recent), default is 99.	VariableW=# of months back to check Contract Start Dates VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	264	Client has a custom process capturing meters on supply orders but needs those meter readings to be flagged as invalid and not to be used for billing. Stored procedure runs only.	
No	eautomate	265	Notify technician of a new call created via e-info.	VariableW=put TEXT here to have message sent to the text messaging device..otherwise we send to techs email address VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	266	For any clients who use the dispatch module for deliveries and pickup of equipment. If you are using dispatch in this way, you should have certain CallTypes setup for the different delivery/pickup options (Install...Demo Install...Pickup Return To Lease..etc). Whatever calltypes you setup to use for your deliveries, you MUST be sure that you assign the Category Install/Pickup to those calltypes so that our alerts & e-automates reports know that calls assigned to those calltypes should not impact response times and can be filtered out of service metric reports. This alert will trigger of all calls assigned to a calltype that is in turn assigned to the Install/Pickup calltype category. You can check this by editing your Call Types from List and Codes / Call types. You also must create a job for each sales rep and assign the rep to that job and then use that JOB on all calls for that sales rep.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	267	To send a notice to specific technicians (Create the attribute as a user defined lookup as ENABLED/Disabled choices for custom property you declared in VariableW) that a new call has just been placed on their board. This works by checking for calls status Pending and alerts the tech assigned to the call once. We memorize the call/tech as the unique key so if the call is reassigned to a new tech but still pending the alert should notify the new tech once.	VariableW=AttributeName of custom property assigned to technicians set to ENABLED

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	268	This alert is specifically for dealerships who assign all their equipment to specific technicians and they want to notify that assigned technician whenever a call is opened / placed on his/her equipment but assigned to another technician. This is usually a necessity for dealerships who are are using CopiesBetweenCall as a component for tech compensation. If you have your calls by default come in assigned to the unassigned tech then put that technicians employee number in VariableW.	VariableW=TechEmployee number for your Unassigned tech. VariableY=NotUsed VariableX=NotUsed VariableZ=NotUsed
No	eautomate	269	To alert the specified person(s) when a service call has been released from Credit hold. If you select "ToCreator" we will send the email to the person who released the call from onhold.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	270	To Notify specified person(s) that a sales order has been released from credit hold.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	271	This alert is designed to get feedback from your employees. In order to receive a survey, each employee must be set up in the People/Employees console with a valid email address.	VariableW=Not Used VariableX=Not Used VariableY=Not Used VariableZ=Not Used
No	eautomate	272	We have clients who use service calls to swap out defective toner cartridges on client machines and they use a billcode DEFCART (you indicate the billcode you use in VariableW on this subscription) on the service call to make the item not billable to the customer. They want to get an alert of the call details (model/sn/customer/item/description) showing those defective items.	VariableW=BillCode used on Service calls that you want to see all the material used for VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	273	To watch contract invoices past due > VariableW days.	VariableW=#Days for contract invoices past due VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	274	To notify if there are documents stuck in the e-automate document processing queue	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	276	To notify when a supply order has been released from credit hold.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	277	To send an email to the vendor for Drop Shipped POs. VariableW is where you enter the attribute you created in e-automate as the custom property assigned to the vendor to disable this alert. The attribute should be a user defined lookup type with the options Enabled or Disabled	VariableW=Attribute name associated to Vendor custom property to disable this alert for VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	278	To alert if ending meter used in service contract billing is estimated and is more than VariableW% of the beginning meter on the invoice	VariableW = % (as integer only) to use as flag if Ending Estimated meter on contract invoice exceeds beginning meter by VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	280	Subscribe to this alert to have us install a custom report for Copies Between Calls analysis of models	VariableW=NotUsed VariableY=NotUsed VariableX=NotUsed VariableZ=NotUsed
No	eautomate	281	This is a two step alert much like the mini-statements #213 except this will only send a statement to customers who have a past due finance charge invoice.	VariableW=NotUsed VariableY=NotUsed VariableX=NotUsed VariableZ=NotUsed
No	eautomate	283	Clients Accounting firm wanted a one line per account ending balance only trial balance report.	VariableW=NotUsed VariableZ=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	284	To compare the information on a taxauthority record to a snapshot of previous day for that record and notify if any information changed. This is to help audit that information in case a user makes an keypunch error.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	285	Client wants the warehouse to receive a specific alert for each sales order created with certain statuses. To avoid hard coding and have maximum flexibility all statuses that are to drive this alert must contain a common string of characters (and make sure you use a set of characters not usually found in your statuses...like [ALRT] or something unusual).	VariableW=Character string contain in the all the Order Statuses that will trigger this alert VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	286	To create an export csv file that can be imported into excel to analyze your Contract Based MIF (machines in field). The report will find all active contract equipment and report machine location/zip/territory/technician/#CMCalls/Volume/Revenue/Cost/Customer for the last rolling 12 months. Requires that the connection string be updated in the excel data portion for each client!!!	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed Variablez=NotUsed
No	eautomate	287	To check Host equipment records not in-inventorythat are missing a technician assigned to the record. This alert is built to work only if you want all active host equipment in the Field (not in inventory) to always have a technician assigned. This means what ever schedule you tell us to run it on it will repeat equipment missing technician until a technician is assigned to that piece of equipment.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	288	Some clients do billable service call 24/7 and they want an alert sent to techicians whenever a customer that has the custom property defined in variableW set to ENABLED. Create the attribute as a userdefined lookup with the properties (Enabled / Disabled). This alert will only fire for those customers who have this custom property enabled.	VariableW=Attribute name assigned to Equipment Custom properties and set to ENABLED VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	289	Weekly report to the AR person listing all customers who have invoices older than their 3 month average days to pay.	
No	eautomate	290	We track all host active equipment that has assigned a billcode that starts with the characters you specify in VariableW above (for example if you have more than one warranty billcode then make sure they all start with WTY) and alert you if the warranty date on the equipment is less than today so that someone will change the billcode to the appropriate billable bill code. If you place equipment that will not be going onto a contract and/or the contract won't start until the warranty date on the equipment expires then this process works as well.	VariableW=The characters that your warranty BillCodes start with (not description of billcode!) you assign to equipment under warranty (ex: WTY..) VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	292	Alert 291 is designed for a tech (or sales) to get a list of equipment at a customer site. The tech sends an email with a specific subject line with id # of one piece of equipment. We verify the tech is authorized and send back a list of all equipment at that site. Discuss/feedback http://lnkd.in/6-BtEJ	

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	293	To alert whenever a metered piece of equipment on a contract (a contract that has meter groups) is not included in any of the meter groups and therefore might have been left off. This will not alert you if no meter groups were created at all on the contract (see eventoutputid 160 to alert for missing metergroups). VariableW is where you control how long the alert tells you about a piece of equipment on the contract not in a metergroup. We do that by using the # of days in VariableW to check back from today for when the machine was added to the contract...the createdate of that machine on that contract. If you put 5 in variableW then we only look for machines added to a contract in the last 5 days that are not in a metergroup. After 5 days we no longer nofity you about that machine. When you first subscribe to this alert we suggest you enter 9999 in variableW so that the alert will check ALL equipment on all active contacts that have metergroups and report any equipment not in one of the metergroups. After you go thru and assign the appropriate equipment to the appropriate metergroup then you should update the subscription and set VariableW back to a resonable number of days that you expect your team to have corrected any reported contract/equipment so that the alert will ignore equipment that for whatever reason you did not want to put in a metergroup on that contract. Discuss/Feedback http://lnkd.in/sgv--i	VariableW=Number of Days to repeat alert on equipment not in metergroup VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	294	A client has a process to track the status of the meter capture software installations where they create service calls for the installation and use a range of on hold codes to track the status. They use the best practice of creating codes that have a common use to all start with common characters (in their case all their codes for this process start with FM).	VariableW=character string at beginning of onhold codes to includes VariableX=character string at beginning of onhold codes to includes VariableY=character string at beginning of onhold codes to includes VariableZ=character string at beginning of onhold codes to includes

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	297	YOU MUST ALSO BE SUBSCRIBED TO #177 to use this alert as it is part of a complete lease return tracking process defined in the pre-requisite document on eventoutputid #177. Using the same custom properties you built for #177 this alert watches and alerts you weekly on equipment dueback variableX days from today (or past due) with the status you indicate in variableW. We use your VariableZ on subscription on #177 to identify the duebackdate attribute for the custom properties you created as part of the process. Discuss http://lnkd.in/YCEwpW	VariableW=# Days Prior to returndate (stored in custom attribute you created and specified in VariableZ for Eventoutputid #177) to alert you that equipment is not returned (this alert automatically includes any past due duedate equipment as well) VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	298	Contract History Report - This is a custom report to help you analyze in a quick snapshot summary of your contracts performance.	

No	eautomate	299	To ensure all your equipment records have unique serial #s, this alert will let you know when there are duplicates regardless of the make / model. If you only want to check for duplicate serial#s on HOST models put the word HOST in VariableW (use this option if your company is not using the serial#s from inventory for creating accessory equipment records and your using the HOSTS serial# as the accessory serial#.)
			VariableW=ALL will check for duplicate serial# irregardless of the Model type or whether the model is a Host or Accessory
			NOTE: This alert reports contract number for the serialized items and it is likely that it will repeat for any duplicate serial numbers that are on multiple active contracts.
			
			Discuss
			http://lnkd.in/jm4ccP
				VariableW=ALL/HOST ....use HOST here to check only for duplicate serial#s on HOST models (ignores all Accessory Models). ALL will check for duplicates irregardless of HOST/ACCESSORY model type. VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

No	eautomate	300	Client has new employee doing Purchase orders, and needs to monitor items on POs so that they all have a cost. New employee creating the po but not putting in the cost on the item. This is a training support alert.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	301	For RayMorgan, automated DGI custom reports created for ray morgan. Warehouses to include/exclude are controlled the by value (Include / Exclude) assigned to the attribute on the warehouse	VariableW=ReportType VariableX=Condition VariableY=fully qualified path to write PDF file to VariableZ=AttributeName assigned to custom property of warehouses to include/exclude on the report

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	302	Used Inventory Report for managers. Warehouses to include/exclude are controlled the by value (Include / Exclude) assigned to the attribute on the warehouse	VariableW=ReportType (SalesRep or Manager) VariableX=Condition VariableY=fully qualified path to write PDF file to VariableZ=Attributename assigned to warehouse custom property to include/exclude on report
No	eautomate	303	Used Inventory Report for managers Warehouses to include/exclude are controlled the by value (Include / Exclude) assigned to the attribute on the warehouse	VariableW=ReportType VariableX=Condition VariableY=fully qualified path to write PDF file to VariableZ=FileName of pdf to save
No	eautomate	304	To alert specified person(s) whenever a new call is created and there are other open calls pending for the same street address. This is to allow time for the dispatcher to possibly coordinate the tech(s) if one tech could do both calls. The alert checks the street address on the call by checking from the address from left most character up to the first carriage return (hard enter) in the address to identify calls at the same street address level, not just at the same exact full address. This assumes that your users are using the <Ctrl> <Enter> key sequence in the customer addresses to put the Suite/Floor information on a separate line in the address from the street. It also assumes that your users are consistent in their use of abbreviations in the street names across all customers (ST or Street, Ave. or Ave or Avenue). VariableW is where you put in the CustomerTypeCode(s) (the code, not the description) for any customertypes you want to be ignored for this alert. This is for dealerships who are having techs create "dummy" calls for shop/parts trip/lunch etc where the dealership is the customer (thus a ton of calls everyday at the same location that need to be ignored).	VariableW=Customer Type Code(s) associated to customer records to be ignored by this alert (separate multiple types with a comma please) VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	305	To validate that any contact where the email field contains data has the @ sign in that string. Also looking for spaces, multiple @s, multiple periods etc. If you use the creator checkbox on this subscription, you can supply a backup email to use in Variable W. This email will be used in case the creator is not active or the creator does not have an email address on file.	VariableW=Backup email address to use when creator is inactive or does not have an email address. VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Output ID 79
Process Automation/Monitoring powered by CEOJuice

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	306	To send a report to your supply sales department of customers who might not be purchasing supplies from you anymore, of who have not even ordered supplies from you in the past VariableW months. You must specify in VariableW the # of months we check back for orders. VariableX indicates whether you want Billable OR NonBillable OR ALL order types. VariableY contains the string of characters found in the category you assigned to your supply items.	VariableW=Number of months since last supply item billed/shipped VariableX=indicate if you want to include only Billable / NonBillable / ALL supply orders VariableY=characters contained in the item category(s) assigned to all your supply items (ie: SUP if all your supply categories have SUP in the category code)
No	eautomate	307	To notify warehouse of sales orders requiring special handling (ie: CustomerPickup/TechDeliver/etc) Enter all the shipmethods (the codes...not the description) in VariableW using a comma to separate the different codes.	VariableW=List all the shipmethodcodes (not description..actual code) separated by commas in this variable that you want to trigger this alert VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	309	For clients that want all in-Stock equipment records to have a status AND a condition code assigned. This alert to run monthly and list all that are missing either a Status Code OR a Condition Code.	VariableW= (HOST/ALL) enter HOST to indicate if you want only host equipment checked or ALL for the alert to check all equipment VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed (VariableW= (HOST/ALL)...enter HOST in variableW to indicate if you want only host equipment checked or put ALL in variableW for the alert to check all equipment)

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	310	If your using remote tech and a technicians requests parts in remote tech that cannot be matched to any item in your e-automate inventory then those calls come into e-automate dispatch with an onhold code BADSYNC and show up as Badsync data received from remote client. These calls should normally be addressed by your inventory person quickly (we have alert# 56 that sends an alert to your inventory team anytime a new call is created with badsync data). This new alert is to watch and report calls that are still onhold status badsync for longer than W minutes (in variableW Above). This alert normally would run every 30 minutes and continue to list all calls badsync that are still in that status. As your team processes a badsync call they typically would changed the onhold status to reflect the real status of the call (parts ordered / parts available / etc).	VariableW=Minutes call has been onhold for BadSync code to alert if call still onhold VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	312	Survey equipment installs to thank them for their order, verify contact information for meters and AR,verify everything working as ordered/expected and see how sales performed.	VariableW=# Business Days you want to wait after an install call is closed to send the survey (will not send if call is rescheduled or if a Pending call is still open for the equipment) VariableX=Contact Category to assign to contact to receive survey VariableY=Note Type to enter in contact record to show when the survey was sent VariableZ=Type "All" if you would like to see all surveys that are completed instead of targeted answers

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	313	Deposit based contracts are based upon a $$$ amount, and not really hours left. There is a very good reason for this in that these contracts are meant to work like a retainer contract in that the customer prepays you for $1000 worth of work. However you might have different hourly rates for different types of work so the $1000 is decremented by the hourly rate you use on different labor types that might be used. So a helpdesk call might bill at $50 an hour but an onsite call might be $100 an hour. e-Automate will decrement the customers balance by the appropriate time at the appropriate hourly rate. This alert will let you know when a deposit based contract might be nearing the end of its balance and since the #of hours is not really applicable then all we can do is alert you when the remaining balance drops below the amount you specifiy in VariableW. We recommend that you set this alert to be equal to your highest hourly rate so that in effect you will be alerted when there is less than 1 hour available (at your highest rate). This alert can also trigger if you set VariableX to # of days prior to expiration date to notify if balance >$0. This is for those clients who have a USE-IT-OR-LOSE-IT type of contract on block time and they will need to recognize the unearned balance the date of exipiration which would also trigger a renewal if the contract was set to auto renew when balance hit $0. See the attached document for DGIs best practice around the steps involved to recognize your unearned deposit based revenue when the contract expirts.	VariableW=Threshold Number to alert when any deposit based contract drops below (do not put in the $ symbol...number only) VariableX=# of Days before expiration date to notify if balance > $0 (if your using expiration dates on contract) VariableY=NotUsed VariableZ=NotUsed
No	eautomate	314	Client asked for an alert that would trigger when the total parts on a service call exceeding a target set in a custom property on models to be tracked. This alert will only fire on models where you have set the custom property value to be greater than 0.	VariableW=Attributen ame (integer) assigned to Model Customproperties that will contain the threshold number for parts cost alert VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	315	Worried that your toner is for sale on eBay? To alert when a customer requests more toner through the sales order process and the equipment has a history of excessive toner usage. Manufacturers typically use a 5% fill ratio (per color), we suggest you set the alert for above 8%. Variable X is Black fill %, variable Y is color fill %.	VariableW=service code which identifies toner items. Add EXACT codes separated by commas. VariableX=black fill % limit VariableY=color fill % limit VariableZ=NotUsed
No	eautomate	316	In order for eventoutputid 315 (Excessive Toner Usage) to run correctly, the toner items in inventory need to have a Copy Yield and Usage Limit Meter Type set. This alert will show what is missing this information for the service code(s) given in VariableW. If more than one service code is used, enter the exact service codes, separated by a comma (For example, if you have service codes TonerBW and TonerColor, type TonerBW,TonerColor into variableW).	VariableW=The service code used for the toner. Separate multiple service codes with comma. VariableX=Not Used VariableY=Not Used VariableZ=Not Used

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	319	This is a very specific alert that identifies any Color meters that have 0 allowed copies. It uses the metercategory you assigned to the metertypes you create, if any color meter is on a metergroup that has 0 allowed copies then this alert fires off. Obviously this alert only applies if you never have an instance where you have color meters on a metergroup with no minimum copies.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	320	We struggle with almost all our clients having different systems where they track the customer/salesrep assignments . Not every client is assigning their salesreps to the e-automate customer record for various reasons which means we cannot determine from e-automate the salesrep to send alerts to on an account. So we have created our own mapping tables that we will update with the salesrep information from the source you identify in variableW. Of course this is predicated on that source being hosted within your local windows domain and accessable from the EAutomate SQL Server. If you are assigning your salesreps to the e-automate customer record, then put EAutomate in variableW and we will pull the salesrep from the customer record for the mapping. We will use the salesrep information on this new table for when the alert is for the account manager(s) assigned to the account (volume changes / excessive calls / lease expirations / etc)	VariableW=Indicate Source to pull your salesrep information from [EAutomate] / [GoldMine] / [SalesLogix] / [MSCRM] / [ACT] / [Compass] VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	321	Alert 256 is an alert for last 3 months over previous 3 months volume trending on invoiced clicks. But it requires that a contract have at least 2 quarters of billing to work. This alert will check overage/underage on the invoices in the last week (therefore this alert should be run weekly so that your team can react quickly to any significant underage/overage on the last invoice. If you dont want to check underage put 999 in variableX. If you dont want to check overage put 999 in variableY.	VariableW=% for overage exceeds base by (enter 999) to not alert on overage exceeds VariableX=% for underage of actual clicks to base (enter 999) to not alert on underage VariableY=NotUsed VariableZ=NotUsed
No	eautomate	322	Client would like to track leasing company SALES invoices that are open. This process requires/assumes that you have all assigned a common customer type (Leasing for example) to all your leasing company records in e-automate.	VariableW=Customer TypeCode (not description...but actual customertype code) of the billto customers on the invoices to use as the filter VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	323	To send the call summary info to techs handheld so that they don't have to open up their laptops to get the call information. To send the notice to specific technicians (Create the attribute as a user defined lookup as ENABLED/Disabled choices for custom property you declared in VariableW) that a call has just been dispatched to them. This works by checking for calls status Dispatched and alerts the tech assigned to the call once only.	VariableW=Attribute name of custom property to enable/disable this alert VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	324	Client has some special needs customers around sales orders so they wanted an alert to send them the order details whenever a new order was create and the BillTo customer has this alert custom property Enabled.	VariableW=Attribute name assigned to customer custom properties and [Enabled] VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	325	To send an audit report of Adds/Changes to customer records on the critical fields. This is so you can expand the person(s) who you allow to create/edit customer records and send this audit report to one person who can review the information for accuracy. This relieves the bottleneck of having just one person who can add/update customer records. For new records all information is shown. On changes the original values are show with the updated values.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	326	Eventoutputid 201 alerts when individual items on equipment invoice are cancelled. This alert is to notify when the entire sales order is Cancelled where the Order Type contains the characters in variableW. Typically this would be Equipment so the warehouse knows when a hardware order is cancelled.	VariableW=Character string contained for order type (equipment) VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	330	Client wanted a simple over/under report on meter groups for most recent batch of invoices. We will check invoices between this events schedule and alert you if the Overage exceeded the base by VariableW percent or the Underage was VariableX percent below the base allowed	VariableW=%ofOverageToBaseAllowed VariableX=%ofUnderageToBaseAllowed VariableY=NotUsed VariableW=NotUsed
No	eautomate	331	When a call is canceled but there were parts associated with that call would typically represent when a tech has rescheduled a call WP (waiting on parts) and then before the call is dispatched it gets canceled. The warehouse may have already transferred the items to the technician's stock, this alert lets them determine if they want to complete or reverse the transfer.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	332	For clients who want to setup a review schedule on certain contracts we create a custom property for the Next Review date on the contract and then this alert will send the information VariableX days in advance of that date (and will also include any reviews past due). As your salesreps peform the review then you edit the nextreview date to forward for the next review that is due. Some clients have a document that the customer signs off on as part of the review that the rep is required to turn back in and this document is their trigger to advance the next review date. You could even scan in that customer page and attach it to the contract for evidence and acceptance of the review.	VariableW=Attribute Name f custom property associated with the contract that will hold the next review date OR the phrase "EXPDATE" (if you want the review cycle to be X days ahead of expiration date) VariableX=Days In Advance to alert on review due (will include all past due alerts as well) VariableY=NotUsed VariableZ=NotUsed
No	eautomate	333	This report ages your inventory by warehouse using either the date of purchase order receipts (latest to oldest) or the receipt date on serizlized items. You can select standard or available qty and the cost is pulled from the cost pools associated with the item/warehouse.	This is installed as a Customer report in E-automate only. Not automated.
No	eautomate	334	This task is required for anyone running any or our tasks/reports that are based on the DGI Contract Analytics tables.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	336	This is to update the CJA_Analytics Database for the CEOJuice Field Service Metrics Dashboards	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	337	This alert functions like ID 156 that marks customers inactive and ID 157 that marks equipment inactive. Typically we run this in test mode the 1st time. We will email a list of items marked inactive, we suggest you run this monthly. Variable W=Number of months since last transaction activity. Don't use this alert if you have been on eAuto less time than variable W.	VariableW=Number of months since last transaction activity VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	338	Client wanted a report send daily of previous days transactions for specified account numbers for review.	VariableW=Account Number(s) to include (separate by commas if more than one) VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	339	This alert is to help monitor where you receive a known qty of invoices from a vendor over a period and you need to know if the expected qty has not been met (like monthly phone bill would be qty 1 for 1 month...annual maintenance would be qty 1 for 12 months...etc...). This will also alert if the expected invoice $$ amount does not match any actual invoice by the percent you specify in the custom properties as well. We will create 4 custom properties to assign to any vendor you can apply this logic to 1. quantity of invoices expected from a vendor (to use when you should always get 1 per month) 2. Amount of invoice (if you want to make sure that every invoice posted for that vendor is the same amount. Like rent should be the same amount every month) 3. Percentage variance in the amount of the invoice from an expected amount (when they are not always the same but they should be in a reasonable range of each other)	VariableW=Attribute name of custom property assigned to vendor for Qty of Invoices expected in last X months VariableX=AttributeName of custom property assigned to vendor for Number of months to scan (backwards) for the qyt of expected invoices VariableY=NotUsed VariableZ=NotUsed
No	eautomate	340	For clients who provide vehicles for techs to monitor mileage between Friday last call end odometer to Mon first call start odometer. Report should run Mondays after lunch.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	342	Check newly created rescheduled call items and send alert to tech of item availability in other warehouses. Will show all warehouses where qtyonhand > 0.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	343	Client wants the sales rep on a sales order to be notifed when the status is changed to the status entered in VariableW for this subscription. Alerts rep once and does not repeat.	VariableW=Status (not status description) you wish to alert when sales order changed to VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	344	Client wants to send alert to sales reps on any Orders unfulfilled > X days. Specify the Ordertype(s) you want to be checked for this alert in VariableW (use the actual code not the description and separate multiple codes with a comma)	VariableW=Order types (not order type descpription..actual ordertype code ie:Supply or Equipment) for this alert to check VariableX=No of days order unfulfilled VariableY=NotUsed VariableZ=NotUsed
No	eautomate	345	To list/report all customers where the sales rep. listed on that customer is inactive.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	346	A custom report we can install that will allow you to run a contract equipment population report showing the equipment details with contract rates for each machine.	

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	347	Client wanted an alert if a service call was at $0 but no contract was associatiated regardless of the billing code used. This alert only select CM (corrective maintenance) calltypes. It does not take into account any other call types (PM / Other / Courtesty / etc).	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	348	Clients want to notify sales rep as the status on their sales orders change between the multiple steps in the sales order process.	VariableW=SalesOrder Status for alert StepA VariableX=ConfigurationName used for sales order custom properties VariableY=NotUsed VariableZ=NotUsed
No	eautomate	349	Clients want to notify sales rep as the status on their sales orders change between the multiple steps in the sales order process. Complimentary to the other salesorder status change process tasks.	VariableW=SalesOrder Statuscode for alert StepB VariableX=ConfigurationName used for sales order custom properties VariableY=NotUsed VariableZ=NotUsed
No	eautomate	351	Clients want to notify sales rep as the status on their sales orders change between the multiple steps in the sales order process. Complimentary to the other salesorder status change process tasks.	VariableW=SalesOrder Status for alert StepC VariableX=ConfigurationName used for sales order custom properties VariableY=NotUsed VariableZ=NotUsed
No	eautomate	352	Clients want to notify sales rep as the status on their sales orders change between the multiple steps in the sales order process. Complimentary to the other salesorder status change process tasks.	VariableW=SalesOrder Status for alert StepD VariableX=ConfigurationName used for sales order custom properties VariableY=NotUsed VariableZ=NotUsed
No	eautomate	353	Clients want to notify sales rep as the status on their sales orders change between the multiple steps in the sales order process. Complimentary to the other salesorder status change process tasks.	VariableW=SalesOrder Status for alert StepE VariableX=ConfigurationName used for sales order custom properties VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	354	Clients want to notify sales rep as the status on their sales orders change between the multiple steps in the sales order process. Complimentary to the other salesorder status change process tasks.	VariableW=SalesOrder Status for alert StepF VariableX=ConfigurationName used for sales order custom properties VariableY=NotUsed VariableZ=NotUsed
No	eautomate	355	Clients want to notify sales rep as the status on their sales orders change between the multiple steps in the sales order process. Complimentary to the other salesorder status change process tasks. This task shows the order line item details with links to POs for those items linked	VariableW=SalesOrder Status for alert StepG VariableX=ConfigurationName used for sales order custom properties VariableY=NotUsed VariableZ=NotUsed
No	eautomate	357	Clients want to notify sales rep as the status on their sales orders change between the multiple steps in the sales order process. Complimentary to the other salesorder status change process tasks.	VariableW=SalesOrder Status for alert StepH VariableX=ConfigurationName used for sales order custom properties VariableY=NotUsed VariableZ=NotUsed
No	eautomate	358	This will alert if any inventory transfer requests are still open after W days (specified in variableW).	VariableW=# of days request has been open VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	359	To make sure all inventory requests are processed and either transferred on put onto a transfer order or Purchase order in a timely fashion. Typically this would run daily at 5:30 or 7:30 am so your inventory manager could make sure those requests get processed.	VariableW=# of days request are still unprocessed from createdate (enter 0 for all open requests) VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	360	Alert of Purchase Orders with details canceled today.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	361	Client wanted to know anytime a salesorder was created for specific customers. Custom property will be created with value Enabled/Disabled.	VariableW=Attribute name associated to customer custom properties set to Enabled for this alert VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	362	Client used the onhold code for when a call is incompleted/rescheduled for a Tech Assist. The original call is incompleted for Tech Assist and the reschedule call created is OnHold using a specific onhold code they created for [On Hold Tech Assist] So they wanted an alert to the original tech and the techs manager.	VariableW=OnHold Code(actual code not the description!) to alert on VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	363	Client wanted to track productivity of their accounts receivable department. They use the ARConsole to attach notes to the customer records as they talk to the customer regarding collections and the client wants a daily log of all the notes created by user/type to view their productivity.	VariableW=Days to include notes (enter 0 for todays data only) VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	364	Report to allow for trending of parts usage by territory assigned to the equipment records. The report will allow you to group 3 levels alternately using either MODEL / ITEM / or TECH in whatever order you decide which will allow you to measure all three depending on the need. Report includes the average monthly volume for the remaining active equipment in the field as of the time the report is run. It will aggregate the qty used by model vs. the total count of machines in the field as well when you group by ITEM as the top LEVEL (meaning we show you all the count of all MODELs using that item in the periods vs all of that model in that territory).	Custom Report to run from e-automate
No	eautomate	365	A list of all billable invoices (and credits) but only for specified call types starting with variable W. For professional services managers trying to watch for billed IT service calls that get credited back off at a later date without his/her knowledge. This will be delivered as a custom report.	VariableW=Characters to use for calltype codes begins with VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	366	Manager wanted a time-sheet report for technicians daily showing all time entries for that tech from service calls / unavailable time / timecards. The task can be scheduled to run daily or not at all as this also installed as a custom report to be run on demands. If you want the task to run please indicate in the schedule/comments the frequency and we will match the report to the frequency (weekly/daily/monthly/etc). WHEN RUN AS A AUTOMATED TASK...THIS REPORT ONLY SELECTS TECHNICIANS WHERE YOU HAVE THE [Time Card Export] BOX CHECKED SO THAT ONLY THOSE TECHS ARE REPORTED. [20111003] Updated Stored procedure to pull "CMP" calls from SCQreports to accomodate clients with billable calls and the associated lag time	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	367	To provide a daily/weekly report of meter readings by the user who input the reading.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	368	This alerts anytime an AP/AR invoice or AR Receipt transaction is posted to a future date (> than today) to review and make sure the transaction is dated correctly.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	369	Client wanted to be alerted anytime a customer entered a meter reading via e-info and that meter got flagged as Web-Suspect as the meter reading source. These suspect meters come in as invalid and therefore won't be used in the contract billing queue until someone checks it and validates them.	VariableW=MeterSource code you wish to be notified on (ex: Web-Suspect) VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	370	Tired of your sales reps chasing admin for an update on their orders? If they had accurate information could they under promise and over deliver? Clients want a report to go to selected person(s) (salesrep / manager / owner) on a scheduled basis (daily / weekly / EOM) showing all open sales order details at the time the report runs for equipment orders AND also all the fulfilled sales orders for the current month so reps can see where their orders stand. This shows line item details with links to purchase orders if you are using that feature (ILC), reps can see when the last item for an order is received. This is one of a series of alerts around this process.	VariableW=Character string order type starts with (ie: [Equip]) VariableX=AttributeName for custom property associated to sales order that identifies what Sales Period the sales order is booked to VariableY=AttributeName for custom property associated to sales order for Sales Manager VariableZ=Configuration Name of custom property configuration used on sales orders for sales tracking custom property group
No	eautomate	371	For any clients who use the dispatch module for deliveries and pickup of equipment. This alert will send the list of the calls to each salesrep based upon the JOB you setup for that sales rep. If you are using dispatch in this way you should have certain CallTypes setup for the different delivery/pickup options (Install...Demo Install...Pickup Return To Lease..etc). Whatever calltypes you setup to use for your deliveries, you MUST be sure that you assign the Category Install/Pickup (IR) to those calltypes so that our alerts & e-automates reports know that calls assigned to those calltypes should not impact response times and can be filtered out of service metric reports. This alert will trigger off all calls Pending assigned to a calltype that is in turn assigned to the Install/Pickup calltype category. You can check this by editing your Call Types from List and Codes / Call types. You also must create a job for each sales rep and assign the rep to that job and then use that JOB on all calls for that sales rep.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableX=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	373	Survey the Executive contact (decision Maker) for your customers every Y months. Due to the target audience, the survey should be short and simple. Should also include a Net Promoter Score question http://lnkd.in/itP_rs	VariableW=Number of Months between surveys VariableX=Contact Category assigned to executive contact to send survey VariableY= Note Type to enter in contact record when survey was sent. VariableZ=Not Used
No	eautomate	374	This alert is only for dealerships who are utilizing e-automate's technician qualification features to monitor equipment techs are qualified to work on. Models are assigned qualification codes that will link back to technicians qualification codes so that only techs who are qualified are working on those types of calls. If you're not maintaining your qualification codes on your models and technicians then this alert is not for you. The alert ignores any models where the qualification code is (ALL). See ID 375 also.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	375	Two alerts in one that alert on calls closed where technician was unqualified for that Model qualifications OR a CallBack was triggered where the original call tech was unqualified. If you're not using e-automate qualification codes on your models & technicians then this alert will not work. See ID374 also.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	377	To notify of payments received for contracts where the misc charge gl account = 101697	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	378	On rare occassions client has experienced where a meter reading comes in with a display reading but is missing Actual reading which causes issues with the parts warranty alerts. This alert will try to identify those.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	379	This is an email with a link to a site survey designed to go to the IT contact of the customer to collect the network information prior to install, so you know what type of set up the customer is going to need.	variableW=Custom property name to trigger site survey variableX = Not used variableY = Not used variableZ = Not used
No	eautomate	380	This is a custom version of DGI's contract list to address some missing elements until DGI has time to address them in the upcoming release.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	381		
No	eautomate	383	Client wants a true exception alert when/if an invoice that has been paid is then later voided resulting in a credit memo being created.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	384	Ensuring all toner is properly applied to the customers contract so contract profitability reports are accurate is important. Because some contract types do not have a monthly billing, (customer just buys the toner and gets free labor) clients often don't link printers to the contract. This process is where any supply order that is entered for a customer that has an active contract type we specify in variableX and if the item is in category VariableW then alert if it is not linked to the contract. Use alert 23 to track standard zero charge supplies with no contract.	VariableW=ItemCategory to check VariableX=ContractType exists for customer VariableY=NotUsed VariableZ=NotUsed
No	eautomate	385	This alert was designed for a client who wants to be notified when a call status changes to "scheduled for delivery" so we can email the network install team.	VariableW=notused VariableX=notused VariableY=notused VariableZ=notused
No	eautomate	387	Mailing invoices is an expensive exercise, between $0.50 and $1 per invoice. The biggest challenge to emailing invoices is a valid AR contact with email. This emails checks when your Accounts Receivable person is working on a company in the AR console and if that company does not have an AR contact with email, we send an email reminder.	VariableW which specifies the contact activity code. We use, for example AR within the ar module Use the Creator checkbox
No	eautomate	388	This alert is designed to give you a heads up when toner is ordered for a contract with low profit. An alert is sent if supplies are requested but contract profit is below X %. VariableW is the profit % to alert at and VariableX is how far back to look when calculating profit. A Rolling Period is the last full period. So last Rolling Quarter (RQ01) is the last 3 months but excluding current incomplete month.	
No	eautomate	390	To help monitor when a problem might be occurring with one of the meter capture tools. Alert to notify that VariableX meter readings are the exact same within VariableY days, where meter source is in VariableW list. (Separate the metersources in VariableW with a comma if you want multiple sources ie: PrintFleet, FMAudit.	VariableW=List of meter source codes (seperated by commas) that you want this alert to monitor for duplicate reading VariableX=Duplicate Count > X VariableY=Days back to check meter readings. VariableZ=NotUsed
No	eautomate	391	To notify with remaining quantity of an item when it has been in drop ship warehouse longer than x number of days	

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	392	This alert is to identify the contacts that have taken the time to complete multiple surveys during a measured time frame. You may choose to send an automated email from CEO / President to them, thanking them for their efforts, stressing the importance and encouraging them to continue.	variableW = # of surveys completed variableX = # of days back variableY = Not Used variableZ = not used
No	eautomate	393	This alert is to let you know when a technician is unable to complete a service call as they don't have a part they need and this happens twice in X days for that same part number. Suggestion is that you add that part to that tech's car stock. This has three nested sub queries and could drag a slower server. Suggest running once daily after hours.	VariableW is the number of days to look back VariableX is the number of times that the warehouse and Item combination triggered a reschedule within that look back period
No	eautomate	394	For those that want to receive an export of all of the responses that came in for the week in Excel or PDF format. For those running multiple surveys, enter "Yes" in variableX to use the the recipients specified in the survey Eventoutputid (i.e. 109, 312, etc.)	VariableW=Enter in "Excel" or "PDF" to choose which format to receive VariableX=Enter "Yes" if you would want to use the recipients specified in survey Event Output ID (ID 109, 312, etc) VariableY=Not Used VariableZ=Not Used
No	eautomate	396	Almost every new copier has an option that allows for meter read collection via email or fax. However these options are not always enabled. This alert will send an email to a technician each time that a new service call is opened for an equipment ID that has had a previous meter reading that was "estimate" or "other".	
No	eautomate	397	This is an Excel version of the sales report below. Tired of your sales reps chasing admin for an update on their orders? If they had accurate information could they under promise and over deliver? Clients want a report to go to selected person(s) (salesrep / manager / owner) on a scheduled basis (daily / weekly / EOM) showing all open sales order details at the time the report runs for equipment orders AND also all the fulfilled sales orders for the current month so reps can see where their orders stand. This shows line item details with links to purchase orders if you are using that feature (ILC), reps can see when the last item for an order is received. This is one of a series of alerts around this process.	VariableW=Character string order type starts with (ie: [Equip]) VariableX=AttributeName for custom property associated to sales order that identifies what Sales Period the sales order is booked to VariableY=AttributeName for custom property associated to sales order for Sales Manager VariableZ=Configuration Name of custom property configuration used on sales orders for sales tracking custom property group

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	403	If you are familiar with the Net Promoter Score as a means of measuring customer satisfaction (http://lnkd.in/itP_rs) then this alert is designed to let you know when a part of your business is negatively impacting your customer's happiness. To identify the Technician(s) or Models (s) whose average NPS score is outside the standard deviation for the company and are the ouliers that are driving down the companies overall NPS score.	W=number of days back X=nps score threshold
No	eautomate	404	Client had customer who wanted to know each time an automated meter was coming in from their Canon equipment to confirm the meters submitted. So this will be an alert you turn on for specific customers. The custom property field should be a contact look up and if there is a contact assigned to the custom property the alert will email that person whenever a meter comes in with a meter source of variableW on our subscription.	VariableW=Meter source(s) to be used for this alert. Multiple sources must be comma delimited. VariableX=AttributeName associated to the customer custom property that is set to contact lookup, that will trigger this alert for the customer. VariableY=NotUsed VariableZ=NotUsed
No	eautomate	405	This report will show a list of parts that are failing before they should, we show the most failures at the top and list the models. This will help identify items and/or models having extraordinary amounts of warranty alerts. For this report we used a term called shrinkage. It is defined by the loss of potential dollars of use because an item failed to fulfill its mfg yield amount. So if a $100 drum was to go 100,000 copies and only ran 80,000 copies the shrinkage amount was $-20.00. Then the report totals the shrinkage by item and stack ranks from the greatest loss down from the top.	
No	eautomate	406	This alert will send a survey link to any contact with a valid email where the company has a current active contract OR they have purchased supplies in the last X months. This is a quick way to survey ALL your customers and see what your Net Promoter Score is (http://lnkd.in/itP_rs). We suggest a short 3 question survey. NPS/Recommend question Suggestions Have a manager contact me	W=# of months until survey sent again X=Months supplies purchased
No	eautomate	407	To identify all open AR transactions older than the # of days in VariableW where the amount due is > than VariableX. This alert will include unapplied credit memos as well (using VariableX as negative). Will show by customer the invoice# / date / duedate / amount details so that your AR dept can identify and write off any items that are uncollectable.	VariableW=# Days past due VariableX=Due amount gt $$$ VariableY=Not Used VariableZ=Not Used

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	409	Identify contract invoices with multiple estimated meters. Report of contract invoice meter billings where there were two or more consecutive estimated meters used for billing	VariableW=#consecutive invoices with estimates
No	eautomate	410	This is a custom report to show parts usage over rolling quarters (Requires Analytics) and can be grouped by ZipCode or Model Or Item. There are dynamic groupings by Model, Territory, Technician and branch. It can be sorted by Item, quantity or cost. Also has parameters for cut-off by cost, quantity and can hide detail or export to excel. It uses rolling six quarters and includes the equipment population and contract equipment population, period volume, cost and quantity.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	412	Some end user customers have a need to receive a spreadsheet breakdown of each contract invoice that shows the location/address/city/state/model of the equipment with the clicks/charges for each machine so they can charge back their internal departments accordingly. This alert sends a single csv file (to the contact on the contract) that can be imported into excel and reads the information from the contract invoice meterbilling tables. It uses the same distributed check box that the invoice print routine proivces to allocate the base/overage charges across the equipment by BW & Color according to the % of clicks each machine ran against the metergroup totals. Since we are using that same logic this report should match the eautomate invoice printout. If your customer is using costcenters we identify that as the value following the first carriage return (enter key) in the equipment location block. This alert sends one file to the single contact on the contract. Alert 426 combines all the equipment assigned to common contact and sends an email to each equipment contact with all equipment assigned to them.	VariableW=AttributeName associated to the contract custom property that is set to 'Enabled' that will trigger this alert VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	413	To be able to run a current warehouse inventory value report for a selected warehouse and only selected bins. (You can choose multiple bins in variableX but you should separate them with commas). A good business use would be if you used specific warehouse and/or bins for used/rebuilt equipment and you wanted to send the list of available items with cost to your sales reps.	VariableW=Warehouse to select VariableX=Bins to include (if multiple bins seperate by comma) VariableY=NotUsed VariableZ=NotUsed
No	eautomate	414	Juice+ Client uses a process where they pay a % of billable sales orders to a rep that turns in a lead for supply sales. In their process the salesrep on the supply order is the actual supply rep. However they use the AlternateSalesRep feature on sales orders to associate the rep who turned in the lead. They manually do this for every supply order (so it is a tedious user dependant process..user must enter that alternate sales rep in on every new order for the appropraiate customer). So this alert reports the billable revenue by that alternate sales rep for the previous month. Not an event that many other clients might want to use as it does require that the users creating the sales order remember to associate that alternate sales rep on every order where that applies.	VariableW=actual SalesRep on sales order contains VariableX=NotUsed VariableY=NotUsed VariableX=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	415	Client sometimes delivers supplies via their own truck and if the supply order is billable they want to be sure that they bill the customer a freight charge. So this alert fires if a supply invoice is billed with zero $ freight charge for the shipmethod specified in variableW	VariableW=ShipMethod on sales order to check for billed freight if order billable VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	416	Customers sometimes have sales orders filtered to only see the supply orders, and occasionally someone will create a supply order but will have order type set to something other than Supply. This alert will notify you when a sales order is created (and not marked supply order) but the order contains an item for which the category in the item record is "Supply".	VariableW=Item Categories to report on (multiples separated by comma) VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	417	This alert is for service calls on equipment not covered by a service contract and are chargeable. It will notify the dispatched technician that it is a chargeable service call.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	418	This alert is to notify you when an order is created for items sold for less than W% profit. NOTICE: This alert doesn't work correctly, replaced by ID424. Tm	Variable W = % Profit on item
No	eautomate	419	For contracts that expire by copies or a certain length of time such as a contract that is for 2 years or 40,000 pages. This alert will trigger when the customer is nearing their expiration copies or date.	
No	eautomate	420	Custom process to manage lease alerts. We need a letter from the Customer to send to leasing company so that the lease does not go into renewal. So this alert looks at the lease ending date custom property (name in VariableX) and if its withing VariableW days from today of expiring the alert goes out to reminding you to request letter from customer. When send the letter you input the send date on the custom property names in VariableY	VariableW=# of Days Before Lease End Date to alert VariableX=AttributeName for equipment custom property that contains the Lease End Date VariableY=AttributeName for equipment custom property that will hold the EOL Date Due back VariableZ=Equipment Status set on equipment to be checked

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	421	This is the final alert to try and ensure that the equipment is shipped back to the leasing company in time to avoid auto renewal. There should be a custom property on the equipment (VariableX) where you would input a Date you want to trigger from to ensure that you ship the equipment out in time. VariableY would be the custom property where you enter in the actual date you shipped the equipment back. So the alert will see if the DueDate in VariableX is within VariableW days (or less) from today and if there is no ShippedDate (VariableY) entered then it will alert you again. This alert should run every day.	VariableW=# of days prior to return date due to start alert if not shipped VariableX=Name of custom property associated with the Return Due date to use vor VariableW VariableY=Name of custom property that holds the actual ShipDate indicating equipment has been shipped. VariableZ=Equipment Status set on equipment to be checked
No	eautomate	422	If your using any of our lease return process tracking alerts then you must have custom properties assigned for the alert triggers to work. This alert will identify equipment with the status identified that you are using for equipment to be returned to lease company and where any of those machines do not have any custom properties entered yet for the tracking alerts. In other words, if you assign a machine the lease return status but you do not fill in the appropriate custom properties then none of the alerts will work for you. VariableW is the status assigned to the equipment and VariableX is the name of the tracking configuration used to assign the custom property group to the equipment	VariableW=Equipment Status used to track Lease Returns VariableX=TrackingConfiguration Name used for Lease Return custom properties VariableY=NotUsed VariableZ=NotUsed
No	eautomate	424	Client wanted an alert each time a sales order was created with an item price/avgcost margin below the specified target. This alert will report when a sales order line item OR sales order TOTAL margin is created/edited and is below the target margins. It will ignore sales orders ONHOLD.until they are released Rev: 20110927 - add the ONHOLD check and update the associated view.	VariableW=Order Type to check (does not currently accept multiple order types, please select "Supply" or "Equipment" or "Other" VariableX=Item Margin Target (enter as whole number...10 do not include % sign) Enter 0 to have this alert ignore line item margins. VariableY=Order Total margin Target (enter as whole number...10 do not include % sign). VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	425	Client has a program for their sales reps where they can put a customer on a special supply pricing program for one year And get paid commission on the margin on those billable supplies. This alert accommodates that by using a customer type to indicate the customer is on this special program And a custom property to designate the ending date of the program. The report will show all billable fulfilled sales orders For that customer type where the custom property date is not expired. Will group invoices by customer / invoice# Show: Customer / Invoice# / Date / Item / Description / Qty / Price / Extended Amount	W=Customer Type CustomPropertyDate= not expired
No	eautomate	426	Some end user customers have a need to receive a breakdown of each contract invoice that shows the location/address/city/state/model of the equipment with the clicks/charges for each machine so they can charge back their internal departments accordingly. this will send a report to each equipment contact on the contract invoice with all the equipment associated with that contact. (See alert 412 to send one file of all equipment to Contract Contact!) This alert can send a comma delimted file customer can open with excel, or send a formatted pdf file of the report (put "Export" or "PDF" in variableY. The data for this alert comes from the contract invoice meterbilling tables. It uses the same distributed check box that the invoice print routine provides to allocate the base/overage charges across the equipment by BW & Color according to the % of clicks each machine ran against the metergroup totals. Since we are using that same logic this report should match the eautomate invoice printout and the SCContract Equipment Billing eview base amounts.	VariableW=Attributen ame assigned to Contract custom property to ENABLE this alert. VariableX="PDF" or "Export" (enter export for comma delimted excel file format VariableY=NotUSed VariableZ=NotUsed
No	eautomate	427	List All Calls/Orders on credit hold for (not busines hours...actual hours) exceeding Variable W and escalated Alert for hours exceeding Variable X. Typically should run hourly, one email will list all calls on hold exceeding W and or X with X exceeding highlighted. All credit hold calls/orders will repeat. NOTE: This uses straight clock time not business hours...so one day onhold would be 24 hours.	VariableW=Number of hours on credit hold VariableX=Number of hours on credit hold to flag as Escalate in alert
No	eautomate	428	To send a confirmation when a new sales order record is created in e-automate to the Contact identified on the Customer custom property tab for the attributename identified in variableW. Use alert 200 to email the tracking information.	VariableW=AttributeN ame for Custom properties on Customer that will identify the contact to send alert to VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	430	List of vendors where there have been no invoices, no ap payments, no PO’s in VariableW days, showing the last invoice date, last payment date, last PO date to help identify vendors that are inactive. The alert will ignore any vendors created in the last VariableX days (so brand new vendors just setup don’t get tagged with no history).	

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	431	EAutomate does not really maintain a valid Chart of Accounts in the traditional sense of a Chart of Accounts (COA). Most accounting people refer to the COA as the list of valid Acct#/Dept# combinations they expect to be used when posting entries to General Ledger transactions. When improper Acct#/Dept# combinations are used the resulting transactions cause inaccuracies in the Departmental level P&L (typically P&L) statements. Clients have asked to be alerted whenever a GL transaction posts where the Acct/Dept entry cannot be matched to the valid COA. To accomplish this, we provide you with a spreadsheet to fill out for us with your Chart of Accounts which we will use to import into a custom table that we can then use to validate entries against the range of account#'s you specify in this subscription. The alert only supports one range, and typically this alert should run against all Account#'s posting to you P&L statements. If you need to update your COA, simply send us an updated spreadsheet to our help email and we will update the COA for you.	VariableW=Starting Account Number for Range to check VariableX=Ending Account Number of Range to check VariableY=NotUsed VariableZ=NotUsed
No	eautomate	432	Client has a process where they want the CallType on the reschedule call to match the IncompleteCode on the original call so that they can easily spot calls on the board that were created from an incomplete..and see why. So in order to make that "matching" calltype/incompletecode work in an automated fashion, this alert requires that the incompletecode on the original call has an exact matching calltype code in your calltypes. This alert will run thru the open reschedule calls and flip the calltype to the calltype matching the incompleted code unless you specify one code in variableX to use for the new calltype.	VariableW=IncompletedReason(s) to flip rescheduled calltype (list separated by a comma) VariableX=CallType code (code, not description) to flip any new calls from incompleted codes in variableW. Leave blank if you have matching calltypes for your incompleted codes and you want us to flip the new calltype to match that incompletedcode) VariableY=NotUsed VariableZ=NotUsed
No	eautomate	433	Client wants an alert if the billed invoice $$ amount is X% less than the previous invoice for a service contract Alert will show Contract#, both invoice numbers and the amount billed on each invoice as well as a distinct count of active machines billed on the contract.	
No	eautomate	434	Client is running multiple eautomate companies on multiple SQL databases and wanted a custom inventory back order report to show availability of a backordered item in the other eautomate databases. This can only be facilitated easily by insuring that the common items all use the exact same (Item#) for the record. We built this report to show the client items from the reporting database that have no identical match in the other databases.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	435	Client is running multiple eautomate databases for independant company entities and they needed a backorder report on sales orders that would show them availability of the backordered item across all the databases. This works only if the actual item# in all the databases matches exactly.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	440	This alert is meant to fix those issues that occur when a technician is unable to close a service call due to a bad meter read (too high, too low). If the technician gets the alert early, he can alert Administration, and they can work through the fixing of the wrong read. If he waits until the end of the service call, and leaves, then he cannot close the call, and the meter read cannot be validated by sight.	
No	eautomate	441	This alert is created to send when a closed call arrival time = departure time. This often happens when admin corrects a meter read on a closed call and by doing so, arrival and departure times are the same.	
No	eautomate	442	This alert will identify any Customer/Technician/with Net Promoter Score (customer service measurement) below a given standard within a given time frame.	
No	eautomate	443	End of day alert for all closed calls for the day where the equipment is still under warranty (the equipment record warranty date is GT today) The report will show EquipmentID#, Customer, Make, Model, SN#, Machine Install Date, Warranty Expiration Date, Service Call Close Date, Tech, Call Type, Problem Code, Solution Code, Labor hours and all Parts used. This information will be used to possibly fill out any warranty claims with the Mfg.	
No	eautomate	444	To send a list of contacts created in eautomate today to a specified user who is charged with reviewing those and merging any duplicate contacts that might have been created.	
No	eautomate	446	Identify invoices in the document queue which have been voided but not removed from queue. Should be run far enough in advance of the e-agent sending tasks to allow someone to react and remove these documents from the queue.	

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	447	The following alert was created so that sales management can more easily sell to their existing base without relying on sales people and their efforts. It includes a thank you letter, briefly going over the purpose of the email (machines lease is coming due / or age of equipment or service contract is due or excessive service calls). It suggests a meeting to discuss a replacement model at a great deal (as a result of their continued patronage over the years). We plan to ONLY send the alert once so it does NOT look like a form letter. And as often is the case, the sender will copy him/herself in on the cc: This will allow that individual to follow up with that email directly with the customer. This email was necessitated by the following: Keeping ones customer base is one of the biggest challenges. Sales reps are often complacent, and get paid a great deal of money to basically be an order taker after a few years. Also, with attrition, many of the original sales reps are no longer working at the end of a customer's lease. And the sales owner often takes those "house accounts". This makes it easier for that individual or another individual to be designated to follow up. More alerts are sure to follow that will add to this process.	
No	eautomate	448	This alert will notify you when the same phone number is on multiple customer records.	
No	eautomate	449	Alert sent on your schedule that shows all the sales orders that are open with a required date set as the same as today. Client uses the required date to determine when we have committed to a client that they will receive their supplies order. This will let our order desk know what to watch for in the morning to make sure its released and then again at 1 they will see if any order was committed to go to the client but is still sitting in backorder. This will queue them to call the client proactively. The conditions are: * Req. Date - Is the same as- Today's Date * Status- NOT the same as- Fulfilled * Status- NOT the same as- Canceled	VariableW=OrderTypes to include (ie: supply, equipment, etc). Separate list with comma between order types. If left blank then alert will use "Supply" VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	450	Clients administrative department wanted to balance the monthly workload around managing contracts (meter readings, changes, updates, etc) between their admin team. So this alert will report all Active Contract Equipment that are in a meter group and report back the total count of machines for each customer that has more than the number specified in VariableW. They only wanted machines that were in a meter group, so this alert ignores the equipment on any contracts that don't have meter groups (ie: Software support, connectivity support, deposit based contracts, etc) since typically those contracts are easier to manage.	VariableW=# of machines > VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	451	Client wants to validate all meter contacts on active contract equipment, based on preferred contact method type on the contact: 1) If type email then we validate the format of the email address 2) If Fax we validate that the format of the fax# is ###-###-#### In addition to reporting on the above invalid formats, each month we show any meter contact where preferred method is Phone as that is an exception to review every month. So this alert assumes that "Phone" as preferred method on any meter contact needs should appear on this alert.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	453	Our ownership group is looking for some type of report that contains similar information to the alert below, but looks at an account over a period of 3, 6 or 9 months. We would like to review those accounts that may be consistently using over or under their covered copies so we can do an account review. This alert shows that information, but just on a per invoice basis. Is there anything that is developed that would show the running average for a longer period of time?	VariableW=Over% (actual clicks > Base by this pct) VariableX=Under% (actual clicks < Base by this pct)
No	eautomate	454	This automation identifies any client that is set to be billed via credit card. Some AR departments don't always catch invoices that should be billed to credit card immediately and as a result payments are allowed to go past due without notice. This ensures that clients who request to pay credit card will actually be charged at time of invoice.	
No	eautomate	455	This alert is a version of alert ID319 (http://lnkd.in/_xNqmi) which will filter out Contract Minors >1. The logic is that Admin needs the whole report (#319) for review purposes, and ownership needs a new-contract-only report to monitor Sales dept activity/patterns going forward	
No	eautomate	457	Need to notify all your customers that your office will be closed because of Hurricane Irene or just want to let them know that you will be closing at 3PM today and not open again until Tuesday so get your service calls in now? Put All in Variable W to send to just customers with active service contracts, All in Variable X to send to all active customers. Will send to all contacts with email at customer locations.	VariableW=# days to use to for history to pull contacts from orders/calls who will be emailed this alert VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	458	Client uses a specific Bin to track equipment movement. Their warehouse team is responsible for managing a specific bin (used for tracking equipment). When something is transferred into or out of this bin, they wanted an email sent to the warehouse team.	VariableW=Bin(s) to alert on (separate the bins with a comma if entering multiple bins to monitor) VariableX= VariableY=NotUsed VariableZ=NotUsed
No	eautomate	459	To check to make sure that analytics tables were updated the previous night.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	460	In order to identify equipment for your customers that are being serviced by another dealer. We setup a custom property for Equipment Records where you select the servicing dealer responsible for that machine. This custom property is a lookup from the eautomate vendor table and will allow cross referencing of AP payments to a particular vendor/dealership. VariableW is where you identify the attribute name associated to that custom property. VariableX is another custom property to identify on the equipment the SHIP-IN dealership [Customer Record Lookup Name-Number of Customer record for the dealership] . This is so you can track what equipment you are servicing for other dealerships	VariableW=Attribute Name (Lookup Type-Vendor) associated with Equipment Custom Properties for Ship-Out servicing dealer VariableX=Attribute Name [Lookup Type-Customers(Name - Number)] associated with Equipment Custom Property for Ship-IN Dealer VariableY=Attribute Name for Customer Custom Property (ShipIn Dealer) of the Service Contact of shipin dealer to send service alerts to VariableZ=NotUsed
No	eautomate	461	This alert would advise you daily (prior to e-agent processing and sending invoices, if it does so) that you have invoiced a customer who has an open credit in your system. It would be scheduled to give you time to research and apply the credit, if appropriate, prior to sending the invoice to the customer.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	eautomate	462	This is a version of #319 which will filter out Contract Minors >1.(ID319=Contract Meter Group containing Color meters and has 0 covered/allowed copies on the metergroup) The logic is that Admin needs the whole report (#319) for review purposes, and ownership needs a new-contract-only report to monitor Sales dept activity/patterns going forward.	
No	eautomate	463	This alert will notify on all contracts due to expire in a # of days < VariableW, VariableX or VariableY. An excellent catch-all or doublecheck to make sure your processes don't let any contracts fall through the cracks. This is a variant of alert #19, which will check against certain Bill Codes. This alert checks all contracts, and assumes you set expiration dates on your contracts. VariableW is the farthest out # of days, then Variablex, and VariableY would be closest to expiration date	VariableW = Expiring less than W Days but more than X days from Today (Farthest ahead of expiration Date) VariableX = Expiring less than X days but more than Y days VariableY = Expiring less than Days (the closet to expiration) VariableZ = Not Used

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	464	For audit purposes it is sometimes useful to look for a certain condition across your entire database. This custom report will check records in e-automate for linkage to employees no longer active (Eqp assigned to ex-technicians, Contracts linked to sales reps no longer with the company, etc). There are some questions we have yet to sort out, making sure that every record worth looking at is checked and deciding how to format the report. Please visit our Forum at http://ceojuice.zendesk.com/forums and search by ID464 to see the conversation and add your input.	
No	eautomate	465	A simple alert to make sure that new records have a valid phone # entered. By valid we mean 'has ten digits,' the logic of checking anything more specific than that is absurdly complex. This alert will advise the creator of a new record (and, optionally, you) if a new record is created without an entry in the primary phone # field.	
No	eautomate	466	This alert notifies you whenever a contract proposal invoice is paid.	
No	eautomate	467	EAutomate User Daily Activity log...purpose is to send a list daily of the transactions (major transactions, calls,invoices, receipts, checks, etc) created by each user for that day	
No	eautomate	469	A contract review using most-recent meters, not billed meters as in ID332. If you have contracts that run long billing cycles (bill overage yearly, for example) but you nonetheless collect meters regularly (monthly, again for instance) than this report will give you a good overview of volumes, service calls, etc. This is a Custom Report, not an automated alert	
No	eautomate	470	Our closed call survey is our most popular process, the option to calculate a measurement of your customer satisfaction level (NPS) is huge. Research and our client's feedback show that if you get your entire company focused on this metric great things happen. The NPS score is a simple number that everyone can understand from reception to AR to the delivery guy. It is both a loyalty metric and a discipline for using customer feedback to fuel profitable growth in your business. ID470 will send the brochure below to your company each month. It shows your NPS score for the previous month and year to date. We are looking for some feedback on the design and in particular whether we should include the ranking data. This alert is live now if you want to subscribe.	

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	471	This alert was built to send a pdf of the closed call ticket for a piece of equipment where you have specified a Dealership equipment custom properties (attribute name in VariableW) and a service contact for that dealerships customer record in custom properties (attribute name in variableX). The request was to give you the option to send the closed call details to a fellow dealership for whom you are servicing on their behalf for one of their customers.	VariableW=AttributeName assigned to equipment custom property that identifies the Dealer(customer) you are servicing the equipment for VariableX=AttributeName assigned to the ShipIn Dealer in VariableW Customer record for the dealerships Service Contact email VariableY=NotUsed VariableZ=NotUsed
No	eautomate	472	For clients who don't do contract renewals or contract enddates (just contracts that are evergreen) we have this alert that will trigger XX days prior to each anniversary of the contract start date to allow them to get a quick idea as to the performance of the contract over the last year. See alert ID150 for a more complete contract profit alert.	
No	eautomate	474	This is an alert that checks on your requested schedule (minutes) that each tech is assigned to a call. If a tech goes more than VariableW minutes without dispatching him(her)self, an e-mail goes to the tech's manager and optionally to the tech directly to remind them to do so. VariableX is the AttributeName for the custom property associated with the employee record to "Enable/Disable/ this alert for technicians. We need some feedback from clients on how to handle a couple of the remaining problems, particularly how to deal with lunch breaks and return-to-base calls (if you techs don't log those as calls, we need to get creative otherwise this alert might not be for you).	VariableW=# of minutes tech idle for VariableX = Attributename of custom property on employee tab to enable/disable this alert for VariableY = NotUsed VariableX = NotUsed
No	eautomate	475	Client wants a daily alert/list to go to their warehouse personnel listing all unfufilled equipment orders that are set to two statuses that they want to track daily. This report will repeat all the unfulfilled orders for the selected type(s) in the selected status(es) on every alert schedule requested.	VariableW = Ordertype(s) to be checked on this alert (separate list by comma) VariableX = Status(es) to trigger this alert (separate list by comma) VariableY = NotUsed VariableZ = NotUsed

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	476	Client wanted to have an alert of any/all calls Not Invoiced > W days so that they can review if the calls should truly still be open or if they should be cancelled. You have the option of only running this alert for Field Technicians. To do so, enter the attribute name of custom property assigned to employee file designating employee as a field tech (Normally ZCJFieldTech) into Variable X. If Variable X is left blank, the alert will run for all technicians.	VariableW = # of days from call open date to alert on VariableX = To include Field Techs only, enter the attribute name of custom property assigned to employee file designating employee as a field tech (Normally ZCJFieldTech). VariableY = NotUsed VariableZ = NotUsed
No	eautomate	477	An alert that runs every morning M-F and shows you all the invoices with any one of several strings (VariableW) in the Blanket PO Field, a date of VariableX relative to the Invoice Due Date and an Amount Due > VariableY. The intent is to be able to track invoices from time of creation, whether for a manual credit card process, salesrep followup if unpaid, or any other 'extra-special' customer service need. Initial client use will be a manual process for remembering to bill customer credit cards at time of Invoice Due.	Variable W = strings to check for in Blanket PO field, separated by a comma, Variable X = Date to trigger, relative to Invoice Due Date (-5 for five days before, 5 for five days after), VariableY = minimum Amount Due to trigger, Variable Z = not used
No	eautomate	478	Some clients request copies of service invoices be sent to an additional contact above and beyond the AP contact. We have a process to advise an additional contact of service call opened/dispatched/closed (ID54), but that alert does not actually provide a copy on the finalized invoice. This process does that for you. Using the same Custom Properties as ID54, if you're also using that alert, you can specify a contact to receive a copy of the service invoice for any completed service call.	
No	eautomate	479	An alert similar to ones for Customers and Equipment, this process will de-activate Contacts according to the following criteria: 1) not linked to any active Customer, 2) Record CreateDate older than W months, 3) [soliciting suggestions]. As with the other alerts, there would be a test mode to show you what action the alert would take prior to it actually making changes to your system.	
No	eautomate	480	This alert advises you of all invoices created since it last ran which were not processed by the document queue for printing, e-mailing or faxing and were also not manually printed or sent. The alert will send an e-mail to the invoice Creator letting them know it was not processed (since some invoices are not processed on purpose) and optionally send a full daily report.	

Subscribed	Application	Event OutputID	PurposeofAlert	VariableDefinitions
No	eautomate	481	Assumption: you are on a calendar fiscal year, otherwise this alert will not work for you. This alert checks daily for postings into a previous month. If you qualify under the assumption, this alert will make sure that if a previous month is opened, and not properly re-closed, your people will not accidentally start posting transactions (mostly voids) into the previous month.	
No	Sales Logix	232	Client has to monitor for salesreps creating a new opportunity record instead of working on an existing opportunity that might have come in as a lead from another internal source (technician, telemarketing, etc). Client has seen where some sales reps will purposefully try to cut out the person who submitted a lead originally to avoid paying a lead fee. Since we really cannot determine duplicates this alert will report only new opportunities created where there are other open working opportunities that have a source not equal to VariableW (in the example we use SELF).	VariableW=LeadSource used to identify SELF generated opportunities vs. oppty from other areas (tech/telemarketing/other employee/etc) VariableX=NotUsed VariableY=NotUsed VariableW=NotUsed
No	Sales Logix	250	This is a housekeeping alert where the saleslogix account table has had records inserted thru the database directly and no accountid was generated.	VariableW=NotUsed VariableY=NotUsed VariableX=NotUsed VariableZ=NotUsed
No	Sales Logix	262	To notify when a new account has been created in sales logix since the previous working day	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	Sales Logix	296	To compare the custom territory table rep assignments between to different saleslogix databases. Allcopy.	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed
No	Sales Logix	429	To list out the Territory, Zip Code, and the Division1 / Division2 / Supply rep assignments to each zip code in the custom_Territory table	VariableW=NotUsed VariableX=NotUsed VariableY=NotUsed VariableZ=NotUsed