



Alert v20 Features List

(11/2/20)

Features Released Early (in v19)

When clearing customers from tickets, do not clear delivery information **

Change the View link on the Operations Dashboard to load the ticket **

Update customer email for ALL customer types from the counter**

Highlight staff already committed on that day in Dispatcher Dashboard **

Highlight dispatch routes for specific drivers on Dispatcher Dashboard **

Add ability to view tickets from counter sales commitment list **

Show customer level pricing on search screen **

Rename all "Ticklers" to "Tasks"

New Features / Improvements:

Login:

Alert is now using Cyberscience v8.21

Uses a new Landing Page to replace the old main menu

Automated the organization of the Landing Page ribbon so it is based on the user's usage – most used options will come up first

Adds the ability to set which screen to start in when logging into Alert

Stranded Ticket/Work Orders can appear in Favorites

Adds selected custom reports to the Favorites list

Counter System:

The Counter Customer screen is reorganized to show user defined fields in a box on the right and update, modifications & billing information below the name.

(** indicates feature recommended by the Alert Users Group)



The counter main screen shows 50-character rental items names and 30-character sales items names

Adds meter to individual rental items selection screen

Adds default payment type for each customer type for use at counter/work order payment screen

Skips user defined fields when fields do not have a field description

Skips over phone fields when fields do not have a field description

Moves the email address field into the customer name section

Email notes are now stored separately from Text notes and are displayed using a new email notes screen

The Job/PO Search box active help will now search on keyword.

The fields included in the keyword search are: Job/PO#, Job Name, Job Address, Job City, Job State, Job Zip code

The Record Owner field added with a user definable description.

Adds Kits for Sales items

Adds ability to insert Sales items

Adds hyperlink from sales item's Cost/Price field to show 3 years cost analysis report for selected sales item

Adds customer sales group pricing

Shows customer level pricing on search screen

Delivery/Pickup Board has five level user-definable colors / descriptions plus holiday.

Delivery/Pickup Board captures user initials on status change

Safety notes/attachments PDFs can be printed directly to the printer at the counter/work order when saving a ticket/work order

Adds a time stamp to the "Re-enter on Stranded Ticket" option to show when the ticket was loaded in the work file **

Adds highlight to the counter main ticket screen showing when all rental items are checked in

Adds ability to copy a ticket to a different location



Hovering over the tax amount on closed tickets now shows the tax area and a breakdown of the tax charged

Operations Dashboard

Access to stranded tickets is now available from the Operations Dashboard

The Operations Dashboard can be filtered by Record Owner instead of Salesperson

When changing the Starting Date in the Operations Dashboard date range filter, the Ending Date changes as well

Adds job information to the customer invoices screens in the customer Operations Dashboard

Adds Delivery/Pickup board with user definable colors/descriptions for five levels plus holiday into Dispatcher Dashboard

Document Center:

Adds Sign&Rent capability to the Document Center

Adds rental item, PO/job number, owner and sales person to the ticket list

Work Order:

Adds sales kit and related items to Parts selection

Moves the email address field into the customer name section

Hovering over the tax amount on closed work orders now shows the tax area and a breakdown of the tax charged

Adds a time stamp to the "Re-enter on Work Order" option to show when the ticket was loaded in the work file **

Reports:

Allows scheduling of Monthly Sales Journal **

(** indicates feature recommended by the Alert Users Group)



Allows scheduling of Equipment Sold **

Allows scheduling of Timecard General Ledger Summary

Allows scheduling of Timecard Summary

Allows scheduling of Credit Card transactions Processed by Gateway

Allows scheduling of Commissions Sales

Allows scheduling of the Rental Class Equipment List

Allows scheduling of Floor Planning Sales Items

Allows scheduling of Purchase Order Receipt

The exception report interface screen is reorganized for easier use

Adds count of new tickets report to the Clerk Activity Report Interface screen

System-Wide:

Screens can be resizable at will

Adds a log entry in the system log when customer accounts are merged

Add-on Modules:

Credit Card Processing

Includes an interface for Card Connect

Commission Management

Changes commission system to use rental rates stored at the ticket rental item level for commission calculation

Changes commission calculations for sales items to allow sales item commissions to be based on Profit on Cost or Discount from Retail

When using Customer ID#4 for commission ID, the counter customer screen filters by location



Zoho CRM

Adds a record owner field to Alert's customer record, contact record, and task record. Matches this information with Zoho's record owner field.

Adds a one-way interface for Alert summarized tickets to be sent to Zoho as "Deals". When ticket status changes, the Zoho deal stage changes.

Zoho tracks Expected Revenues from "Deals" as Alert orders change from bid to reservation to closed ticket

Job Costing

Adds ability to print a job costing worksheet

Adds ability to delete job costing worksheets

Adds Cost of Goods Sold to Job Costing

SmartEquip

Checks for overridden/manually created PO#s

Rouse

Historical data can be supplied for initial setup so system is completely operational sooner