



Events—streamline processes within your business using SCEM

OneOffice Supply Chain Event Management (SCEM) monitors key business processes and identifies important events as they happen. Details of each Event are passed to the OneOffice Alert Manager which uses customised business rules to determine who within the organisation needs to be notified about the Event (if anyone) and when.

Key Features at a Glance

- Monitor business processes in real time using Events
- Extensive and growing range of Events available
- Works in conjunction with OneOffice Alert Manager and Workflow to ensure that users are notified when important business events occur

Benefits

- Enhanced service levels by identifying issues and opportunities as they occur
- Improved productivity through ensuring that people are notified about urgent tasks
- Better inventory control with proactive monitoring of stock levels and instant notification of potential problems
- Focused margin improvement through real-time monitoring of quotes, orders and shipments

Introduction

Most businesses would like to improve operational efficiency **and** customer service without increasing overheads. This leads to a number of challenges including how to:

- Implement effective and pragmatic change programmes for fast ROI
- Identify and measure improvements in operational effectiveness
- Reduce operating costs through targeted process development
- Improve service levels through accurate activity monitoring, escalation and reporting
- Avoid costly and time consuming false starts
- Define and enforce 'best practice'

Today's competitive marketplace demands operational productivity, administrative efficiency, business agility, shorter turnaround times and increased shareholder value.

Business Process Streamlining (BPS) is key in transforming processes to achieve these results. As the modern enterprise seeks to focus ever more narrowly on its core activities, BPS increasingly is being considered as a business strategy that provides access to 'best in class' processes and cost predictability. This growing trend for enterprises to review their internal operations to more fully understand and leverage their core competencies is the primary driver behind the increasing adoption of Business Process Streamlining principles.

Within the OneOffice environment, an advanced Supply Chain Event Management (SCEM) capability provides a framework to meet these challenges.

With proactive and immediate context sensitive notification of business critical events, coupled with the ability to seamlessly manage the resulting process through the business, OneOffice enables the businesses to control, monitor and enhance its performance and activities.

Events form a key part of the overall solution. Events are agents, working inside the OneOffice application and out into your supply chain to monitor key processes and activities within your organisation.

Everyday inside your business thousands of activities are taking place and each one represents an opportunity to improve efficiency and deliver better service to customers; the challenge is knowing where and when to look. This is the role of Events.

An Event is triggered when an event occurs within a business that needs to be brought to the attention of an individual or a group. Sophisticated workflow facilities ensure that you have complete control over the management of that event to deliver a satisfactory conclusion, including automatic escalations into the business where required.

There are a wide range of events and activities monitored by Events. These seek to address a range of business issues and



deliver a number of key benefits, including:

- Enhanced customer service
- Improved credit management
- Sales efficiency gains
- Focused margin control
- Sales productivity improvements
- Optimised RMA processing
- Purchasing efficiency gains
- Warehouse and stock efficiencies

Events operate throughout the OneOffice software suite, watching out for events and passing appropriate data and object functions to the OneOffice Alert Manager. An extensive range of Events are available, including the following:

- **Customer put on stop** – notifying all the people who need to know that there is an important customer issue that requires resolution; reacting quickly could save substantial amounts of money, as well as preserve your relationship.
- **Customer nearing payment overdue status** – managing your credit accounts proactively, advising your customers of potential account problems before they occur can be a real benefit to your on-going trading relationship.
- **Customer exceeding credit limit** – controlling your credit exposure through active management of potential risk scenarios. Immediate communication with your customer may resolve the problem before any of his supplies are affected.
- **Customer exceeding defined DSO figure** – monitoring your customer payment patterns and notifying staff

of worrying trends. The DSO values for each customer account are calculated at the end of each accounting period. Spot the trends and deal with the issue before it jeopardises supply of goods and services to your customer.

- **Sales ledger transaction placed on query** – a dissatisfied customer situation has arisen that requires quick resolution. Immediate visibility of any disputes allows you to seek resolution before they escalate.
- **Sales order (and/or line) on hold** knowing in good time that there is a potential problem with the supply of goods to the customer enables the necessary communication to take place to resolve the issue to everybody's satisfaction.
- **Sales order placed on credit hold** notify the correct people within your business who may need to communicate with your customer and avoid the disappointment of a late delivery due to a mix up at your customer.
- **Sales order requires approval** – active notification of a problem with a customer's order can, in many instances, lead to resolution of the problem before the supply is affected.
- **Queried transactions exist for this customer** – up to the minute information on all disputes immediately available as you talk to your customer. Impress them with your grasp of recent trading history.
- **Alternatives exist for this product** focused on sales opportunities, always be aware of other options should you not be in a position to provide the customers favoured option.
- **Special offers exist for this customer** – promote and manage



specific targeted offers, together with customer focused sales lists, to maximise all your revenue opportunities.

- **Order placed on 'Ship & Debit' hold** – in a busy distribution environment, it is possible to miss that the price support on a particular bid has now been invalidated (perhaps it has expired). Ensuring that these occurrences are immediately brought to management attention is vital to limit exposure on these agreements.
- **Notes exist for this customer** – recognise that there has been dialogue with the customer and that there have been earlier conversations that are relevant to this present situation.
- **Open returns exist for this customer** – be aware of outstanding issues with returned product during your conversation with the customer, ensuring that you have all relevant information readily available.
- **An order is in peril for this customer** – focused customer service demands swift communication both internally (in order to tackle a potential delivery issue) and potentially externally (to manage customer expectation) regarding the potential exposure of a customer order linked to a delayed incoming PO. This is a key point of differentiation between you and your competition.
- **Supplier acknowledgement has delayed ETA** – once again, instant notification of this problem to the relevant personnel within the business can help to ensure that customer orders at risk from this event can be dealt with before they become customer disappointments.
- **Sale lost due to stock shortage** – make the loss of a sale due to a stock-out a rarity – immediately inform your buyers of the problem and help them better manage the problem.
- **No 'Required Date' on sales order** – where a member of your staff has inadvertently neglected to qualify the date upon which your customer requires delivery, prove your enhanced customer service policy with a quick call back to check.
- **'Required Date' has changed for an order** - will this result in a potential delivery problem? – Notify the appropriate members of staff within the organisation to try to ensure that it doesn't.
- **Goods receipt against overdue PO** – the goods have now arrived, let's get cracking on shipping those delayed customer orders. We may have notified the customer regarding the delay, but let's not make that a delay a moment longer than is necessary.
- **Profit Margin outside high-low limits on order line** – letting the sales person know that there may be a problem with this order is always useful, particularly where other managers may also receive automatic notification of the same issue. You need to protect your margin, but you don't want the customer coming back for a credit.
- **Zero price on order** – although there may be a variety of good reasons for this occurring, for safety's sake, nobody would object to a check on the validity of this type of transaction.



and ensure that your records are updated appropriately.

- **Purchase ledger transaction placed on query** – holding up a vendor payment may require proactive communication with that vendor to ensure that there is no disruption in the continuing supply of goods. A transaction may be placed under query directly within the supplier's purchase ledger account.
- **Purchase invoice requires approval** – ensuring that the relevant personnel are informed that an invoice requires authorisation for payment and that liabilities are registered in a timely manner.
- **Purchase order requires approval** – a crucial element of managing the supply chain is the timely authorisation of vendor purchase orders.
- **Invoice posted against purchase invoice with variance** – an immediate notification to the appropriate purchasing manager that a potential problem exists with a vendor's invoice can help in keeping the relationship on track.
- **Product stock on hand which is soon to expire** – always useful to know that you have inventory on hand which is in danger of becoming out-of-date or obsolete. Let's make sure that the sales force is primed to promote these products to our customers.
- **Ordered quantity below minimum** – a useful check to ensure that you are not despatching small shipments at too great a cost to your business and giving the chance to communicate this to your customer and up-sell the order.
- **Invalid order multiple** – another useful check, to ensure that you supply your customer the right number of units / inners / outers and that you receive immediate notification of inappropriate orders.
- **Split reel on order** - an order has been placed that will result in a split reel being shipped – will this adversely affect your customer's production process? You should check this before despatch.
- **Picking list produced** - Useful to actively notify warehouse management that new work has arrived requiring specific activity.
- Stock of product is older than a defined period – always useful to know that you have inventory on hand that is in danger of becoming out-of-date or obsolete. Let's make sure that the sales force is primed to promote these products to our customers.
- **A selection of the available Events are charted overleaf, summarising how Events can make a positive impact, right across your business.**

Events - A summary of targeted areas for Process Streamlining and Productivity / Efficiency Gains

	Enhanced Customer Service	Improved Credit Management	Sales Efficiency Gains	Focussed Margin Control	Sales Productivity Improvement	Optimised RMA Overhead	Purchasing Efficiency Wins	Warehouse & Stock Efficiencies
Customer put on Stop	Y	Y	Y					
Customer nearing payment overdue status	Y	Y	Y					
Customer exceeding credit limit	Y	Y	Y					
Customer exceeding defined DSO figure	Y	Y	Y					
Sales ledger transaction placed on query	Y	Y	Y					
Sales order (and/or line) on hold	Y	Y	Y					
Sales order placed on credit hold	Y	Y	Y					
Sales order requires approval	Y	Y	Y					
Alternatives exist for this product	Y				Y			
Special offers exist for this customer	Y				Y			
Order placed on 'Ship & Debit' hold	Y				Y		Y	
Notes exist for this customer	Y		Y		Y			
Open returns exist for this customer	Y		Y			Y		
An order is in peril for this customer	Y				Y			
Supplier acknowledgment has delayed ETA	Y		Y		Y			Y
Sale lost due to stock shortage	Y				Y		Y	
No 'Required Date' on sales order	Y		Y					Y
Required Date' has changed for an order	Y		Y					
Goods received against overdue PO	Y						Y	Y
Profit margin outside high-low limits on order line	Y		Y	Y				
Zero price on order				Y				
Cost price on outstanding quotes has changed			Y	Y				
Open orders or quotes exist for selected customer			Y		Y			
As above for selected customer / product			Y		Y			
Customer is already on call list			Y		Y			
Purchase ledger transaction placed on query							Y	
Purchase invoice requires approval							Y	
Purchase order requires approval							Y	
Invoice posted against purchase order with variance				Y			Y	
Queried transactions exist for this customer	Y	Y	Y			Y		
Product stock on hand which is soon to expire							Y	Y
Ordered quantity below minimum					Y			Y
Invalid order multiple					Y			Y
Split reel on order					Y			Y
Picking list produced								Y
Stock of this product is older than defined period					Y			



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