



Accountable Technology

## Vigilant Example Alerts currently being used by APS Clients

Alert Name	Alert Description	Scheduled	Staff Member alerted
Sort Name	When the Sort Name in the Details Tab has been altered	Daily - Continuous	Practice Manager
Birthdays	Alerts to Client's Birthday	Daily - Once	Employee
New Client	When Matter has been completed and not transferred to the client within 3 days	Daily - Continuous	Practice Manager
Invailld Tax	When there is no GST within invoice	Daily - Once	Manager responsible
Unposted Batch is disbursements	When there is any unposted disbursements for the current day.	Daily - Once	
Open Fees	Fees open for more than 4 days - unposted	Daily - Continuous	At 4 days - Employee & Manager At 5 days - Employee, Manager and Partner
Actual over 80%	Actual \$ Value of WIP is X% of Budget & Self Review	Daily - Once	Employee
Daily Reminders	Incomplete Timesheets for the day before	Daily - Once	Employee
Weekly Reminders	Incomplete Timesheets for the week	Weekly	Employee & Manager
Actual /Chargeable	Actual Chargeable is less than X% of Budgeted Productive time for the week	Weekly - Once	Employee & Manager
Open Matters	Any Matter with a Self Review Milestone that is open for greater than 6 weeks and not closed	Weekly - Once	Employee
Further Open Matters	Any Matter with a Self Review Milestone that is open for greater than 7+ weeks and not closed	Weekly - Once	Employee & Manager
WIP	WIP greater than \$X, or WIP greater than 90 days over the value of \$X	Weekly - Continuous	Employee & Manager
Unfinished Tax Return	SFS status in Tax Manager not changed to Lodged or finished within 14 days	Weekly - Once	Employee
Further Unfinished Tax Return	SFS status in Tax Manager not changed to Lodged or finished within 21 days	Weekly - Once	Employee & Manager
Relationships no set	For certain client types, no relationship and/or no matters set	Weekly - Once	Practice Manager
Incomplete Audit	When pack has been in audit for one month but audit not finalised	Fortnightly	Employee & Manager
Debtors	When debtors get to 60 days +	Monthly	Practice Manager
Due returns	Where tax return is due in less than one month and the signed return has not been signed for lodgement	Weekly - Once	Employee & Manager
Timesheet Actual	Where actual time on timesheet is less than standard	Weekly - Once	Manager responsible
Expenses Approval	Where outstanding expenses are to be approved	Weekly- Oce	Manager responsible