

What Accountants Need to Know About Alert



Alert Rental Management Software is about to make your life not only easier, but more accurate. I am a co-owner of Alert Management Systems, and a Certified Management Accountant®. I understand first-hand the value you add to your business, and how much clerical time can be wasted with inefficient rental management systems. This whitepaper is a brief synopsis on how Alert will make your life easier, which will enable you to contribute more of your time to business planning.

Kara Longmire, CMA
Co-President/CEO
Alert Management Systems

A handwritten signature in black ink that reads "Kara Longmire".



Be a Control Enthusiast

Join me in becoming a Control Enthusiast (never a control freak!) and manage your accounting entries with precision. Alert is a top-to-bottom rental management system, which includes tracking everything from revenue to cash receipts to sales tax. This means that with your input, Alert will smoothly match to your General Ledger.

- Match GL codes for all revenue and expenses that flow through Alert. If you put your credit card receipts in a different cash holding account than your other cash receipts, let's set it up that way in Alert. If you track rental revenue every which way to Sunday, we can set up any number of revenue accounts you like in Alert. The point is that we'll accommodate how you do things, not the other way around.
- Reconciliations made easy. Deposits can have batch numbers assigned to them for easy reconciliation to your bank account. Or you can track by date, customer number, or even GL code if you deposit to different accounts.
- Sales Tax. Precisely remit sales tax by setting up entities. If your sales tax percentage is composed of x% for city, x% for state, x% for county, and x% for special districts, Alert can help you report by entity. You control every entity so your sales tax reporting can be managed by a touch of a button each reporting period.
- Double Check! Ready to make a change in your database? I know how gut-wrenching the feeling is when you're making an across-the-board change to the system – you're concerned about perfection, as you should be. Alert offers a demo system that you can try your change in to make sure it's absolutely correct. As soon as you're confident that everything is in order, make the change in the live side and live life unclenched.
- Real Time. Alert is a real-time system. So if you're working on collections and someone applied a payment 10 minutes ago, you won't be calling your customer to ask for money you already have.
- Security levels throughout the system. From being able to apply a payment against an invoice, to having the authority to order through the Purchase Order system, there are security/authorization levels throughout Alert.



800.530.8050 ★ alertms.com

Save Time

Nothing is worse than getting bogged down in tedious details when there's an easy solution at your fingertips. Let Alert help you save time for more important things.

- **Batching GL entries.** You don't have to keep the same information in two systems, line by line. Alert holds all the details and we offer an easy batch import that matches YOUR GL codes. Run the report to make sure everything is in balance, and your entries will be ready to upload to your accounting system. No need to duplicate everything in your GL when the detail is sitting in Alert.
- **Automate Reporting.** Reports can be scheduled and automatically sent to your email. I personally enjoy seeing my revenue and cash receipts first thing in the morning over a cup of coffee, without having to log into my system and run a report.
- **Excel friendly.** Every report can be dumped into Excel. We're accountants. We love Excel. Alert gets that, which is why every report can be turned into an Excel workbook with the touch of a button. From there, you can sort, filter, and manipulate to your heart's content.
- **Empower others.** With your input during setup, when your co-workers do tasks like inventory adjustments or simple credits, the accounting will be correct. You don't have to do the credits or adjustments yourself anymore to ensure accuracy. Everything will be correct.
- **Automate recordkeeping.** Inventory values and COGS are automatically tracked, and any number of important reports (such as the aging and deposit balances) are automatically archived. You don't need to scan in a copy of an aging or remember to update a spreadsheet of your inventory – Alert tracks it all.

Let Us Help

Ever try to call up big Accounting Software Company for help? I have – it's tiresome, expensive, and frustrating. The same way that your operations folks can call in to our Help Desk, so can you.

- **Training.** Alert offers training on advanced features such as Commissions and Sales Tax Entities. We have loads of documentation and videos, and we'd be happy to sit with you one-on-one until you're sure you've got it right. Have a "simple" question on how to apply a payment or refund a credit card? Give us a call. We're here for you.
- **Report Writing on your terms.** In addition to the hundreds of included reports, Alert has a sophisticated report writing system built right in. But it's not so sophisticated that you can't understand it and write a report. With a little training, you're off to the races! Don't want to spend the time learning how to write a report? That's OK too. We're happy to do it for you.
- **Alert User Group Summit.** Each year at our Alert User Group Summit, we offer a track specifically for the unseen heroes of rental – you! We know you want to offer more value to your organizations and the best way to do that is to completely understand the tools already at your disposal. Our experts will help you learn, and you'll learn great tips and best practices from others in your position who've been doing this a long time.

Features Just for You

Accounting software shouldn't be the only software that matters to us. Alert has a robust suite of features to help you manage your time, money, reporting requirements, and assets.

- **Excel Plugin.** Have a complicated report that needs refreshing on a regular basis? Excel Plugin is here for you. We'll spend time with you getting the information you require and setting it up in an Excel format. Then all you have to do is press a button to refresh the information.
- **GL Integrations.** We know rental software, and programs like QuickBooks and Sage know accounting software. We let them do their thing and we do ours! However, there's no reason that Alert can't upload information to your accounting package, so we offer integrations to several popular choices. Need to change accounting software? No problem!
- **Document Center.** Alert developed our innovative Document Center with a (very detail-oriented!) Credit Manager for a busy rental center. Every feature that's important to you for sending to your customers is included in this centralized location. You can send statements, invoices, invoices with your statements, open tickets, and even work orders from Document Center. You don't have to leave Alert to send the documents, or save PDFs to your desktop and send them from Outlook. Everything is integrated, automated, and trackable. So if you can't remember if you sent yesterday's invoices before you had today's cup of coffee, there's a report for that.

We know that oftentimes accountants are overlooked when selecting new rental management software. That's why we want to ease your mind and let you know that since 1976, we've been thinking about you. All of the innovative features and benefits Alert offers for the behind-the-scenes people have been borne from suggestions from others in your shoes. We have a history of collaboration with our clients and we firmly believe that we're in it together.

