sage Alerts & Workflow ERP

Pay (& Get Paid!) On Time

When was the last time you had to write-off bad debt because you didn't keep on top of a past-due client? When was the last time you missed an early pay discount? Keeping your A/R and A/P data electronically is important; keeping watch over it and taking the right action on it is even more important. Sage Alerts & Workflow does the watching and acting for you – whether it's emailing overdue invoices to clients, texting your mobile about an expiring discount, or putting a delinquent client on credit hold. All automatically – so you don't have to.

Monitor Inventory Activity

Stock shortages. Backorders. Too much on-hand; too little on order. Purchase order delivery delays, POs waiting for approval, and item sales that are hot one month and cold the next. The need to keep on top of what's happening in inventory is an endless one, and even when you have the time to check a dozen different conditions, it's the one thing you didn't check that ends up hurting you.

Alerts & Workflow auto-monitors not just stock levels, but everything in the lifetime of an inventory item, from initial purchase to delivery, storage, and sale.

Help Your Sales Reps *Sell*

Have you ever seen a sales rep work so hard to close a deal – only to have it shot down by finance because the client hasn't paid their last bill? How about a sales rep who seemed *surprised* when you told them that one of their customers had significantly decreased their purchases last month? Alerts & Workflow keeps sales reps on top of their sales. Shipment delayed? Auto-notify the client. Quote about to expire? Auto-deliver it to the prospect. A customer who has changed their buying habits? Alert the sales rep *and* schedule a follow-up phone call between the rep and client.

Know When Something *Didn't* Happen

Sometimes the most valuable information you can get out of your ERP system isn't about what did happen – but what *didn't* happen.

A customer who has stopped buying from you. A stock item that hasn't sold in weeks. A project that has had no activity this month. These kinds of conditions – or "inactivity monitoring" – is precisely what Alerts & Workflow does, so your staff doesn't have to.

Because by the time someone utters those fateful words *"Whatever happened to . . . "*, it's almost always too late.

Alert on Errors & Exceptions

Duplicate item numbers; missing email addresses. Exceptionally high discounts; unacceptably low profit margins. And let's not forget about "doctoring the data". We all have our thresholds; we know that errors happen, and that some people will do things they shouldn't.

You might not be able to stop these things from happening, but you can automate the process to *spot* and respond to them. Alerts & Workflow is the ultimate exception management tool. You identify the conditions and responses; Alerts & Workflow stands guard. Twenty-four hours a day, seven days a week – it is your 'corporate smoke detector'.

> *"Talk about a game changer in our finance department.*
>
> *There isn't a working day that goes by that I'm not grateful for this product."*
>
> *~Rob Gagne*

Automate Report Delivery

How many reports do you run per week – stock status, aged receivables, open POs, check reconciliation . . . the list goes on. And – once a report lands on your desk, is a yellow highlighter pen the first thing you reach for?

Alerts & Workflow automates report generation and distribution; not just on a schedule such as daily or weekly, but on an as-needed, *data-triggered* basis. After all, if you highlight only 20% of every report that crosses your desk, why are you receiving the other 80%?

Industry First: Alert Acknowledgements

Sending an alert is good – but knowing that the alert has been received and acknowledged – and letting the recipient respond to that alert, confirming their acceptance of that information – is better. Alerts & Workflow offers the industry's first "alert acknowledgement module", enabling everything from customers acknowledging details of their order, to service technicians acknowledging acceptance of a critical service call.

Pre-Configured & Custom Events

To help get up-and-running with Alerts & Workflow, the application includes "eventpaks" – collections of preconfigured events for leading front-office and back-office solutions. You also get a wizard-based design engine to create additional events specific to your business needs.

You choose the conditions as well as the responses (alerts, reports, & workflow). Alerts may be delivered via email, text, IM, FTP, fax, and the web, reports include Crystal & SRS, and workflow can trigger updates in any databases. Additional options include "home" versus "work" delivery, holiday handling, and "failover" alerts if the primary recipient is unavailable.

ERP Event Examples	
☑	AP Invoices Due < 'x' Days
☑	AP Invoices on Hold
☑	AP Vendor Pmt Overdue
☑	AR Aged Balance > 'x'
☑	AR Balance Nearing Cr Limit
☑	AR Client No Orders > 'x' Days
☑	AR Invoices Past Due
☑	IC Stock Below Reorder Point
☑	IC Item High Cost Increase
☑	IC Qty on Backorder > 'x'
☑	PO Due This Week
☑	PO Delivery Delayed
☑	PO Status Change
☑	SO Buying Habits Change
☑	SO Order Confirmation
☑	SO Promise Date Change

Monitor All Your Applications

You wouldn't put a smoke detector in just one room of your house, and so why would you safeguard your business by monitoring just one of your business applications? Your business success is dependent on all your solutions – CRM, HR, customer service – and Alerts & Workflow monitors and responds to conditions in all of them. Whether individually or jointly, Alerts & Workflow is an enterprise-wide solution.