



Sage Alerts & Workflow for Sage ERP:

How To Make Your Organization Data-Driven

Don Farber, Vineyardsoft Corporation
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Fact: Time-sensitive information in your ERP system is constantly changing and much of it requires your attention and action.

Currently . . .

- You periodically run (& review) ERP reports, analyses, & queries to identify important, actionable data. You then determine who needs to know about that information and what actions need to be taken.

The 'yellow highlighter' approach.

The Goal . . .

- Your ERP system should proactively monitor itself for critical, time-sensitive information, auto-deliver needed info to the right people, and auto-execute the appropriate responses.

The 'data-driven' approach.

Data-Driven: The Bottom-Line

Can the delay of a week, a day, an hour, or even a few minutes in responding to critical conditions in your Sage ERP system spell the difference between success and failure, or between satisfied and dis-satisfied customers?

(When was the last time you were made aware of crucial activities in your business and you felt like saying . . .)

“If only we had known . . . “

Do you have . . . ?

- ☐ . . . date-sensitive information you need to keep on top of?
(due dates, expiration dates, promise dates, deliver dates, discount dates, etc)
- ☐ . . . business thresholds you need to monitor?
(within 10% of credit limit, more than 'x' late deliveries, gross profit below 20%)
- ☐ . . . certain business activities that should have happened . . . but didn't
(a customer who hasn't purchased, a supplier with overdue POs who hasn't been contacted in over 14 days?)
- ☐ . . . exception management as a corporate initiative?
(identifying duplicate records, reducing data entry errors, spotting excessive price increases)
- ☐ . . . the need to automate trend analysis?
("How do you know if a client has changed their buying habits or if a salesrep is performing better or worse than usual?")
- ☐ . . . to know when critical accounting fields are changed?
(client credit limit or credit status is changed, item price is changed, expected delivery date is changed)
- ☐ . . . a need to automate tasks (e.g., invoicing & reporting) currently done manually?
("Do you have past due invoicing, report generation & distribution, or other processes) that you'd like to automate?")

**If you said 'yes' to 2 or more items
on the preceding slide . . .**

. . . you should consider Sage Alerts & Workflow.



Sage Alerts & Workflow . . .

. . . is like a Smoke-Detector for your Business.

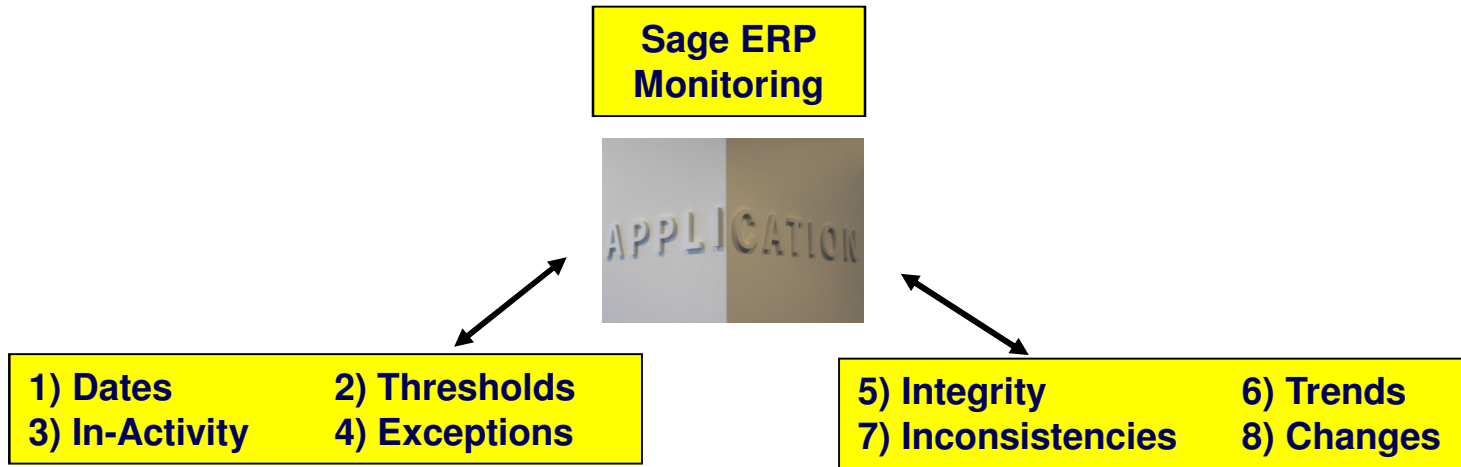
- You tell it what business conditions to watch for
 - . . . how to respond (alerts & actions)
 - . . . and turn it on.
- **12,000**+ customers; less than **9** support requests a day

History:

- Sage Partner of the Year (3 years running)
- "Editor's Choice", "Partner's Choice" awards
- VARBusiness Five-Star Award
- Forbes' "Top Productivity Enhancing Tool"



So how does Alerts & Workflow work?



Sage Alerts & Workflow

Auto-monitored:

- ✓ Every 'x' minutes
- ✓ Hourly
- ✓ Daily
- ✓ Weekly
- ✓ Monthly
- ✓ The 1st or last day of Month
- ✓ The 3rd Thursday
- ✓ Weekdays/Weekends
- ✓ Only between certain hours
- ✓ Not on holidays



Alert Scenarios

- . . . clients with overdue invoices
- . . . salesreps offering excessive discounts
- . . . leases & contracts about to expire
- . . . unapproved purchase orders
- . . . repeat customers who stopped buying
 - . . . low stock inventory items
 - . . . new on-demand AP checks
 - . . . late deliveries
 - . . . vendor price increases
 - . . . sales with low profit margins
 - . . . duplicate items in inventory
- . . . customers who change their buying habits

Sage ERP Monitoring



1) Dates
3) In-Activity

2) Thresholds
4) Exceptions

5) Integrity
7) Inconsistencies

6) Trends
8) Changes

Sage Alerts & Workflow

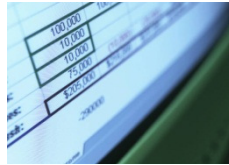
Real-Time Alerts



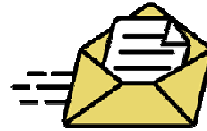
Email
IM
Web

Text
Fax
FTP

Alert Delivery Methods



dashboard



email



fax



**instant
message**

*The right information,
to the right people,
at the right time,
via the right method*



Chart



**text
message**



ftp



Twitter


And . . . Alert Acknowledgements

Sending an alert is all well & good, but how do you know that the recipient has gotten it, read it – and whether they'll be able to act on it?

In Alerts & Workflow v9, an alert can require that a recipient “acknowledge” the message.

Acknowledgements enable such critical processes as 1) clients review of order details, and, 2) staff confirmation of changes to their benefits.

Alerts & Workflow tracks which alerts required acknowledgements, who has (and hasn't!) responded (along with their comments), and how long it took them to acknowledge.

to me 

sage Alerts & Workflow

Thank you for your order. Please review the information below and confirm your order via the link provided.

Your order summary:

Account Number:	VINET
Order Number:	10248
Order Total:	\$440.00

Is this order correct?

Please click here to confirm:
<http://127.0.0.1:4477/ack/3C3BFD6BEE3B24F32ED76882BC76F931C879A45CD976AF498A9259DE493334FB>

Select "Yes" (to confirm the order), "No" (to request changes to the order), or on "Cancel" to cancel the entire order. You may also add comments or further instructions.

Thank you very much for your business.

Vineyardsoft Corporation
[800-850-8055](tel:800-850-8055)
www.vineyardsoft.com

Sage ERP Monitoring



1) Dates
3) In-Activity
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Sage Alerts & Workflow

Real-Time Alerts

Forms, Reports & Charts

Invoice

Sales Analysis

Stock Status



Email
IM
Web

Text
Fax
FTP

Forms, Reports & Charts

Forms: Automate invoicing, statements, POs, dunning notices, et cetera.

Reports:

- **Scheduled**: Hourly stock status report, daily sales listing, A/P check reconciliation, monthly vendor performance.
- **Triggered**: E.g., if a client exceeds 90% of credit limit, then generate an A/R Aging report for that client and deliver that report to the client's salesrep.

Charts: Generate & deliver bar, pie, line, and comparative performance charts either on a schedule or when business conditions warrant it.

(A&W also integrates with Sage Intelligence & Sage Enterprise Intelligence)

Sage ERP Monitoring



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Sage Alerts & Workflow

Real-Time Alerts

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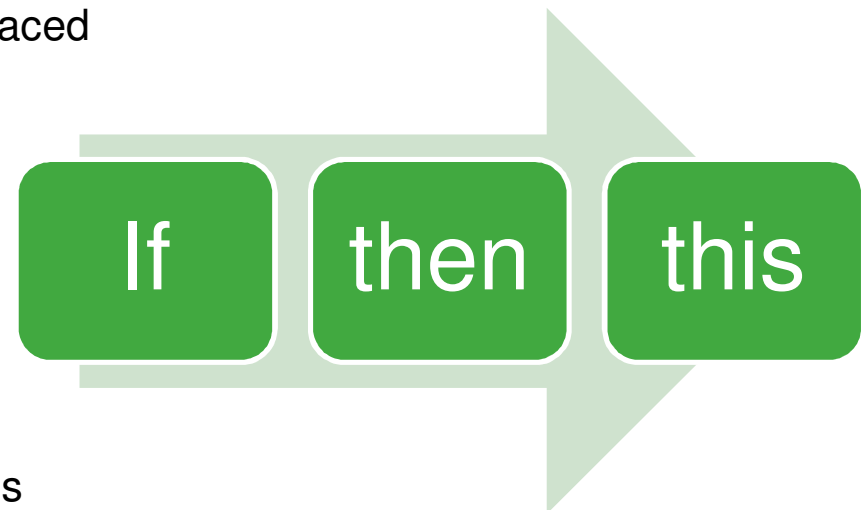
Workflow (Data Updates)



The Workflow Actions Module

Alerts & Workflow can auto-update your applications, such as . . .

- ✓ Schedule a follow-up call after an order is placed
- ✓ Copy order details from ERP to CRM
- ✓ Approve a PO
- ✓ Re-assigning an overdue task
- ✓ Update an account with incoming mail details
- ✓ Auto-place an overdue client on Hold



So . . . with Sage Alerts & Workflow:

- " . . . When a customer is overdue . . . *A&W re-sends them their invoices.*"
- " . . . When a client has decreased their purchases . . . *A&W notifies their salesrep.*"
- " . . . When there's an excessive discount . . . *A&W puts the order on hold.*"
- " . . . When a lease is about to expire . . . *A&W notifies the vendor.*"
- " . . . When a PO is un-approved . . . *A&W alerts our CTO.*"
- " . . . When a supplier raises their prices . . . *A&W sends a price chart to our PO manager.*"
- " . . . When a shipment can fulfill backorders . . . *A&W alerts shipping about those orders.*"
- " . . . When a potential sale is for an overdue client . . . *A&W notifies the salesrep.*"
- " . . . When we have a new price list . . . *A&W distributes it to all staff.*"

DSO: The Health of Your Business

Days Sales Outstanding: DSO measures how much of a company's credit sales are tied up unproductively as accounts receivable.

The lower the DSO number, the more efficient the company. E.g., a company with an average A/R balance of \$640,000 over 30 days and total credit sales of \$742,000 for the same period has a DSO of 25.9 days.

DSO measures the efficiency of a company's A/R management. Revenue tied up in receivables cannot be used to fund operations or grow the business.



$$\text{DSO} = \frac{\text{Accounts Receivable} \times \text{Number of Days in Period}}{\text{Credit Sales}}$$

Lowering Your DSO:

DSO is higher when . . .

- ☐ Invoicing & collections are manual
- ☐ Salesreps are unaware of overdue receivables
- ☐ You take orders for past-due customers
- ☐ You have to review reports to see who's past due
- ☐ Days (or weeks) pass before delinquent clients are notified

DSO is lower when . . .

- ✓ Invoices, statements & collections notices are delivered automatically
- ✓ Sales staff are alerted about overdue receivables
- ✓ Past-due customers auto-placed on hold
- ✓ No human intervention is required
- ✓ Delinquent customers are addressed at the moment they become past due

Sage Alerts & Workflow reduces your DSO.

Case Study: Toyo Ink

Multi-national manufacturer of ink for printing presses

- **Problem**: Staff had to go to too many sources to learn about account activities, payment & order status, etc. Exception management done manually.
- **Results**: In 6 months, over 20,000 alerts to staff, clients, partners
- **Benefits**: Better insight into who has been sold what, their financial status, and current stock, order, & delivery status
- **ROI**: Saves 100 work hours monthly
- **ROI**: A/R collections raised by \$11k monthly

Licensing & Pricing

Monitor: one application for unlimited conditions

Alert: as many people as you want

+ Deliver: via email or text method

Price: (no per user fee)

Options:

Add "Reports" Module: \$999 (one-time cost)

Add "Actions" Module: \$999 (one-time cost)

Monitor additional applications: \$1,799 per application (4 = Unlimited)

**ROI Within
88 Days**

Sage Alerts & Workflow:
Product Demonstration

So . . .

what people can benefit from

Sage Alerts & Workflow?

Purchasing:

"Can someone check with the supplier to see if our delivery is on time?"

CFO:

"We need to stop writing off bad debt."

Customer:

"I didn't realize this invoice was still unpaid..."

Everybody

"...but when they occur."

"Have we gotten t

When past-due clients?"

"Are the fulfilled?"

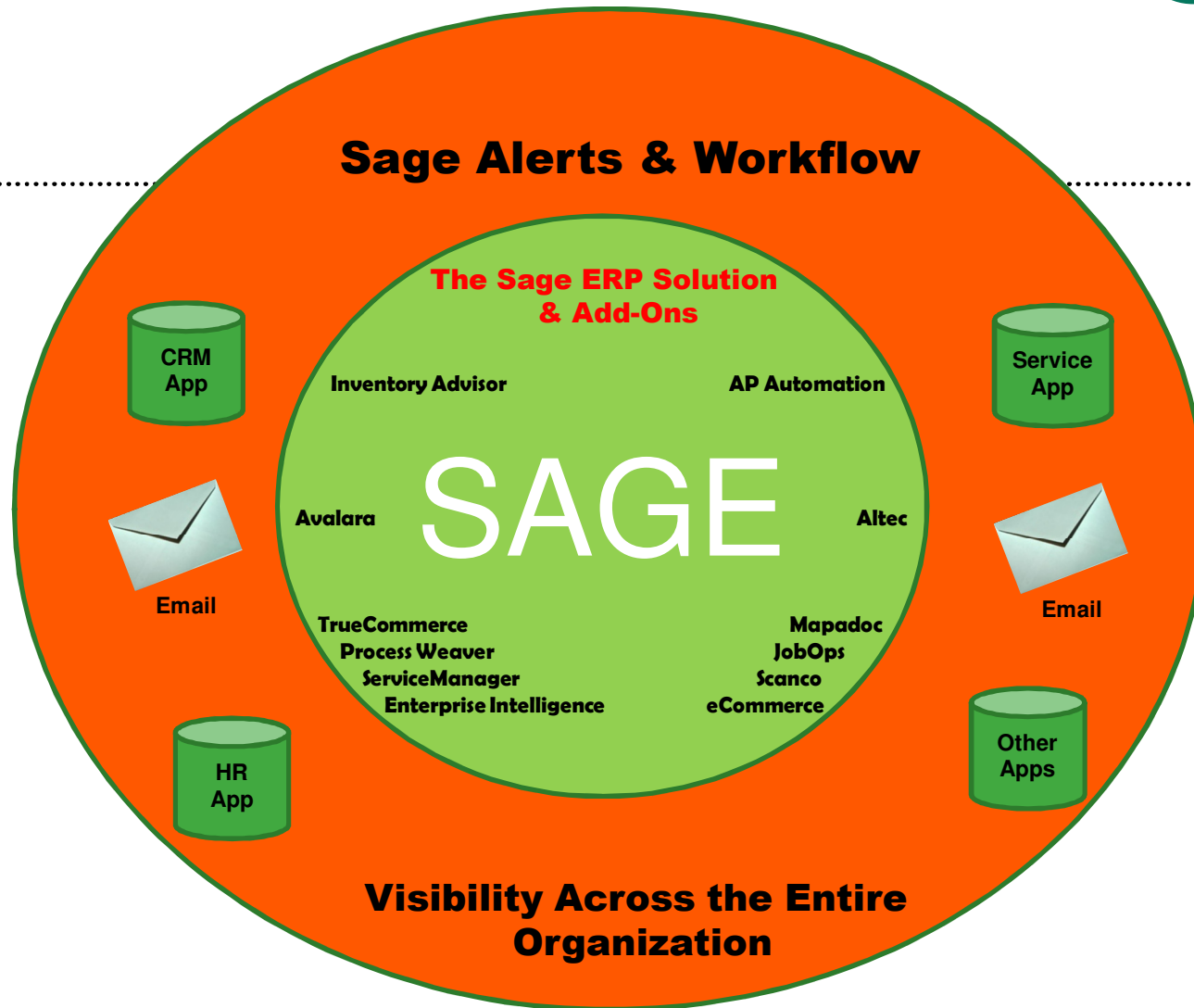
AP Staff:

"I can't believe we missed another early payment discount."

CEO:

"I can't wait til tomorrow to know what's happening today."

**But Sage Alerts & Workflow
benefits more than just
your Sage ERP solution . . .**



Visit Our Website . . .



The screenshot shows a web browser window with two tabs: "Sage Alerts and Workflow" and "Yahoo". The address bar displays "www.alertsandworkflow.com". The browser's toolbar includes various icons for applications like Dell, Weather, MLB, eBay, Vineyardsoft, KS Download, and social media like Yahoo, Gmail, and AbeBooks. The website header features the "Sage Alerts & Workflow" title and a "Sage Endorsed Development Partner" badge. A navigation bar contains links for "Sage Endorsed", "By Sage Product", "Download", "Documentation", "Support", and "Contact". The main content area is a large banner with the headline "Are you listening to your business?" flanked by images of two men. Above the headline, several business-related terms are listed: "Change in Buying Trend", "New Hires", "Low Sales Rep Pipeline", "Late Shipments", "Overdue Customers", "Change in Profit Margin", "Expiring Certifications", "Projects Over Budget", and "Low Inventory". Below the headline, a green text block states: "Your business data has so much to say to you ... Give a voice to your data - whether ERP, CRM or HR. Choose the only Alerts & Workflow solution endorsed by Sage." The page is divided into three columns. The left column features a video player titled "Sage Alerts & Workflow - What can i..." with a play button icon. The middle column is titled "Alerts" and contains the text: "Keep people informed. Deliver automated alerts about any business conditions, such as overdue invoices, critical support issues, or contracts about to expire. Deliver the alerts via any method, any device, including email, text message, fax, dashboard, or instant message. And send them to everyone; employees, customers, and suppliers – in the format they want, and when they need them the most." The right column is titled "Workflow" and contains the text: "Streamline processes by automating best practices. When a client becomes overdue, automatically put them on credit hold; when stock runs low, auto-create a purchase order. And if a support request is received via email, turn that message into a support ticket. Move data".

Sage Alerts & Workflow

Sage Endorsed Development Partner

Sage Endorsed By Sage Product Download Documentation Support Contact

Change in Buying Trend New Hires Low Sales Rep Pipeline
Late Shipments Overdue Customers Change in Profit Margin
Expiring Certifications Projects Over Budget Low Inventory

Are you listening to your business?

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Sage Alerts & Workflow - What can i...

WHAT DO I

Alerts

Keep people informed. Deliver automated alerts about any business conditions, such as overdue invoices, critical support issues, or contracts about to expire. Deliver the alerts via any method, any device, including email, text message, fax, dashboard, or instant message. And send them to everyone; employees, customers, and suppliers – in the format they want, and when they need them the most.

Workflow

Streamline processes by automating best practices. When a client becomes overdue, automatically put them on credit hold; when stock runs low, auto-create a purchase order. And if a support request is received via email, turn that message into a support ticket. Move data

Reports

Auto-deliver relevant forms, documents, and reports to the people who need them. Automate the generation and delivery of invoices to customers, purchase orders to suppliers, and analytical reports to managers. Schedule reports to auto-distribute based on any recurring schedule and in the requested format.

For More Details . . .



(U.S.) 508-696-6495, www.alertsandworkflow.com

- Free download of Alerts & Workflow; 30 day trial software
 - Free access to tech support
 - Free access to documentation & video training library
- Technical Support: All Alerts & Workflow customers contact Vineyardsoft and are covered by annual M&S
- Ordering coordinated thru your Sage Business Partner
- Professional services for implementation, customization, etc. for you provided by your authorized & certified Sage Partner



Sage Alerts & Workflow for Sage ERP:

Enabling the Data-Driven Organization

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