

Sage ERP Alerts and Workflow

by Vineyardsoft

A Smoke Detector for Your Business

Business Activity Monitoring. Every organization has critical information and transactions that need monitoring. A prospect who has not been followed up with, a contract that is about to expire, a pricing error. Sage ERP Alerts and Workflow by Vineyardsoft monitors all your business data—both within your Sage product lines and beyond. Providing every organization with much needed exception management, Sage ERP Alerts and Workflow identifies and responds to conditions that fall outside of an organization's standard operating procedures and enables organizations to avoid saying "If only we had known."

Automatic Form, Document, and Report Delivery

Most organizations today spend far too much time manually running, distributing, and delivering various forms, documents, and reports to both their internal employees and external clients and partners. Sage ERP Alerts and Workflow automates both the production and delivery of such documents, whether it's sending quotes, invoices, or letters to clients, or distributing analytical reports to an organization's own managers and executives. Using Crystal Reports®, Sage ERP Alerts and Workflow generates forms and documents when needed—or when business conditions demand it—and delivers this information to the right people at the right time.

Intelligent Workflow and Business Process Automation

Sage ERP Alerts and Workflow does more than just send alerts; it triggers "workflow" to update your applications, schedule intelligent tasks, and move information between an organization's disparate software systems. Whether it's to update a client's history based on the receipt of an email message, or to schedule a phone call for a prospect who has not been contacted within the last week, Sage ERP Alerts and Workflow gives organizations the means to automate (and monitor) critical business processes.



BENEFITS

- Notify staff about critical business issues when they occur—and not hours, days, or weeks later.
- Identify trends or problems across your entire business by combining and analyzing information from multiple systems.
- Synchronize data between multiple business applications and identify inconsistencies between databases.
- Know when someone changes a critical piece of business information—like a contract renewal cost or a client's credit limit.
- Be alerted—and trigger automatic corrections—when potential problems appear in your Windows operating systems.
- Monitor activity on your website and autoprocess information requests and/or questions from prospects or clients.
- Combine all your applications—including homegrown solutions—under one Business Activity Monitoring solution, and create a central point for business process management.
- Enable "follow-me alerts" that know when and where to find you based on the time of day and day of the week.



Features

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| Enterprise Class Architecture | Sage ERP Alerts and Workflow uses the industry-standard Microsoft SQL Server® database for unequaled data processing speed, flexibility, and scalability. SQL Server Express or Microsoft Access are also available as database options. |
| Integration With Industry Standards | Supports Microsoft Exchange (Outlook) email, Internet (SMTP), and Lotus Notes Mail for both alerts and monitoring incoming email messages. Includes integration with Microsoft Fax and browser-based alerts through Microsoft Internet Explorer. |
| Wizard-Driven Event Designer | No programming or SQL expertise needed. Wizard-driven process walks through event design steps, including trigger definition and message design. Automatic HTML message design output available without HTML coding. |
| Complete Event Audit Trail | Online history of triggered events, delivered alerts, and executed workflow. Includes whether alert was successfully delivered, time of delivery, and names of attached reports and forms. Also includes utilization reporting for event optimization. |
| Alerting by Email, Fax, Pager, Screen Pop, and Web Browser | Alert recipients can receive information through any combination of email, fax, pager (including SMS paging), screen pop, FTP (for document and report delivery and web browser. No additional hardware or software is required). |
| Form and Document Delivery in All Standard Formats | Includes order confirmations, invoices, statements, dunning notices, newsletters, and picking lists in HTML, PDF, Word, Excel, or other formats. Delivery may be scheduled, or it may be based on business transactions or application activity. |
| Dynamic Date Calculations | Allows monitoring of activity taking place “today,” “tomorrow,” “yesterday,” “last week,” “next week,” “current month,” and so on. Special “last check” processing optimizes system resources by dynamically identifying new and/or changed data. |
| Flexible Message Formatting | Includes “header” and “detail” sections, customizable grouping, executive summary, task-level listings, and record-level alerts to clients. Supports currency and numeric formatting as well as controls for columnar display and unlimited free-format . |
| Intelligent Alert Recipients | Includes client’s sales rep, manager, and other responsible parties. Supports workdays/hours, and home vs. work delivery addresses. Alert recipient data from all Sage programs is automatically linked to Sage ERP Alerts and Workflow with no reentry of data. |
| Limitless Scheduling Options | Includes every “x” hours/minutes, daily at specific times, named day (for example, every Monday at 9 a.m.), and numbered day (for example, first Monday, third Thursday). Incoming mail monitored every “x” minutes. Holidays and event dependencies supported. |
| Scheduled & Triggered Report Distribution | Generate and distribute an unlimited number of Crystal Reports (forecast reports, activity reports, and so on) to unlimited recipients. Report delivery can be scheduled or real-time trigger-based and can be delivered by email, fax, FTP, or web browser. |
| Email Response System | Monitor incoming email and website requests. Match email/web info with contact records in Sage programs. Update contacts with email details, schedule follow-ups, and create accounts, contacts, leads, and transactions based on content received. |
| Cross-Application Analysis & Response | Combine data from multiple Sage programs, analyze it jointly, and trigger integrated alerts. Use combined results to move data from one application to another or verify consistency of records across multiple Sage databases. |