

# Actionable Insight – 10 Ways to Improve Your Business

Alerts & Workflow

Sage

Sage Tech Partner  
Plus



CHORTEK  
CPAs | BUSINESS ADVISORS

# Actionable Insight: The 3 Value Propositions

1. Automate the detection of critically-needed information

You know 75% of what you need to know.

2. Automate the delivery of that information.

“Push” what people want, how they want it & when they need it.

3. Automate the process of acting on that information

Since you often know “when this happens, then do that”, automate the “then do that” part of the process.

# What is Sage Alerts & Workflow?

Alerts & Workflow is a software solution that automates “if – then” business processes within your organization’s ERP, HR, CRM, and related software applications.

You tell Sage Alerts & Workflow:

**If ‘this’ activity or condition happens, then do ‘that’.**

# For Example, with ERP . . .

- **If** a new order comes in, **then** send an invoice to the client
- **If** a PO needs approval, **then** notify the CFO
- **If** a client has overdue invoices, **then** put them on credit hold
- **If** an item drops to within 10% of its reorder level, **then** create a PO and notify the Purchasing department
- **If** a repeat buyer has not purchased in 30 days, **then** notify their salesrep and schedule a follow-up in a CRM application

## For Example, with HR . . .

- **If** you hire someone, **then** send them the employee on-boarding materials
- **If** a capital expenditure needs approval, **then** notify the CFO
- **If** a staffer fails a drug test, **then** put them on probation
- **If** an equipment lease is about to expire, **then** generate a lease history report and request a renewal quote from the leasing company
- **If** an employee's review is within 30 days, **then** notify their manager and send the employee the self-evaluation URL link

# What Are the Benefits of Alerts & Workflow?

By automating your “**if – then**” business processes, Alerts & Workflow gives you three benefits:

- 1) **It saves you time.** A&W automates tasks currently being done manually. (“collecting on past-due invoices”.)
- 2) **It makes you more responsive.** Many business scenarios are time-sensitive and often don’t get done soon enough. (“stock shortages”.)
- 3) **It increases your knowledge.** You don’t have the time to look into all of your business’ activities. Alerts & Workflow does. (“clients who stopped buying”.)

The following questions are all  
answered with a 'yes' or a 'no'.

*Count your number of yes answers.*



# Process: Form Delivery

**Question #1:**

**Do you have staff whose job includes generating and delivering standard forms and documents?**

- ERP software involves a lot of standard forms and documents – like those on the right.
- On average, 60% of all such forms are auto-generated and delivered by your ERP system; it's the other 40% that we're concerned with here -- requiring a staffer to manually generate & deliver the needed forms.

**Alerts & Workflow automation:**

**If an invoice is > 30 days past due, re-send it to the client.**

| Module              | Forms   |
|---------------------|---|
| Accounts Receivable | Quotes<br>Invoices<br>Statements<br>Dunning Notices       |
| Inventory           | Picking Lists<br>Receipts<br>Transfers<br>Physical Counts |
| Purchasing          | Purchase Orders<br>Returns                                |



# Process: Exception Management

**Question #2:**

**Do you (or your colleagues) run and review reports to identify ‘exceptions’ within your business?**

- “Exceptions” are data values that require special attention and/or action. Consider invoice terms:
- Some terms (e.g., “net 30”) may require no special notice, whereas others (e.g., “COD”) may warrant a staffer’s attention and action.

**Alerts & Workflow automation:**

**If invoice terms = COD, alert finance & put the order on ‘hold’.**

**Invoice Fields:**

|              |
|--------------|
| Customer     |
| Salesrep     |
| Status       |
| Product      |
| Type         |
| <b>Terms</b> |

“We need to know if the invoice’s . . . ”

. . . customer is \_\_\_\_\_  
. . . terms are \_\_\_\_\_  
. . . salesrep is \_\_\_\_\_  
. . . status is \_\_\_\_\_

# Process: Timed Response

**Question #3:**

**Do you and your colleagues spend time checking to see if you've met (or missed) date-sensitive obligations?**

- Most ERP applications tell you when a date is 'here' or is in the 'past'. But that's not enough . . .
- Businesses today need to make decisions based on activities occurring "within the next 'x' days", "within the last 'y' days", or "more than 'z' days in the past".

**Alerts & Workflow automation:**

**If a client balance > 0 and their last payment > 30 days ago, email them a payment due reminder.**

| Due Date             |
|----------------------|
| Create date          |
| Discount Expire Date |
| Renewal Date         |
| Approval Date        |
| Request Date         |
| Require Date         |
| Ship Date            |
| Promise Date         |
| Completion Date      |

- . . . is within 'x' days
- . . . is 'today' or tomorrow
- . . . is 'this week'
- . . . is > 'x' days away
- . . . is in the past
- . . . is > 'x' days in the past

# Process: Threshold Monitoring

**Question #4:**

**Do you review reports or other analytics to see if your business has neared or exceeded acceptable thresholds?**

- When it comes to monitoring thresholds, it's not enough to know when a level is surpassed.
- You need to know when a threshold is neared, surpassed, and even surpassed by more than a certain amount. And you need to know now.

**Alerts & Workflow automation:**

**If a vendor has more than 3 late deliveries this month, send them a warning notice & change their status to 'pending'.**

|                      |
|----------------------|
| past due amount      |
| quantity backordered |
| discount amount      |
| gross profit pct     |

|                       |
|-----------------------|
| total freight charges |
| total sales           |
| total overdue         |
| total open quotes     |

|                       |
|-----------------------|
| # of calls            |
| # of orders           |
| # of purchase orders  |
| # of overdue invoices |

# Process: Assignments & Approvals

**Question #5:**

**Do approval requests (like POs) ever sit on someone’s desk for days causing delays in your business?**

- One of the most common reasons for delays in business is that assignments and approval requests go unnoticed and un-responded.
- Think about those aspects of your business that require someone’s approval or have to be assigned, acknowledged, or reviewed.

**Alerts & Workflow automation:**

**If a PO is for > \$999, text our CFO for their approval.**

|                       |
|-----------------------|
| a sales order         |
| a work order          |
| a purchase order      |
| a capital expenditure |
| a service request     |

| <u>is assigned to:</u> | <u>is sent to:</u> | <u>is approved by:</u> |
|------------------------|--------------------|------------------------|
| ... vendor ‘x’         | ... shipping       | ... a manager          |
| ... technician ‘x’     | ... finance        | ... the CFO            |
| ... partner ‘x’        | ... testing        | ... purchasing         |
| ... support rep ‘x’    | ... dev            | ... the CEO            |
| ... salesrep ‘x’       | ... production     |                        |

# Process: Enterprise-Wide Auditing

**Question #6:**

**Are there some fields in your ERP, HR or related apps that you'd like an audit trail for but can't get it?**

- *“Who changed that?”*
- ERP applications offer limited auditing – and for some organizations, that’s sufficient.
- But if you need more, consider both what you need to audit, and how quickly you need to know about it.

**Alerts & Workflow automation:**

**If a client’s credit limit changes, track the old & new limits and save this data for historical analysis.**

|               |
|---------------|
| credit limit  |
| credit status |
| item cost     |
| assigned rep  |
| status        |
| priority      |
| due date      |
| promise date  |
| discount      |

|                                   |
|-----------------------------------|
| has changed to more than \$10,000 |
| has changed to 'Hold'             |
| has changed                       |
| has changed to 'Greg Swallow'     |
| has changed to 'complete'         |
| has changed to 'urgent'           |
| has changed                       |
| has changed                       |
| has changed                       |

# Process: Report Distribution

**Question #7:**

**Do you have staff whose job it is to run and distribute your organization’s analytical reports?**

How many reports does your organization use, how often are they run, and – who runs them? Do some require dynamic selections, such as business ‘today’, ‘tomorrow’, ‘last week’ or ‘next week’?

How are reports delivered? Via print & “sneaker mail”, individual email, or web portal posting?

**Alerts & Workflow automation:**

**If it’s Monday at 9 AM, run & distribute our weekly A/R & A/P reports.**

**A Sampling of ERP Reports:**

|                          |
|--------------------------|
| A/R Aging                |
| A/P Check Reconciliation |
| Balance sheets           |
| Job status               |
| Today’s Shipments        |
| Gross Profit Analysis    |
| Stock Re-Order           |
| Backorder report         |
| Picking List             |

# Process: Data Cleansing

## Question #8:

**Does the presence of 'bad data' or missing data in your ERP, HR or related solutions create challenges?**

- Although the time it takes to spot and fix bad data in ERP applications is often minimal, it's when you fail to notice such 'bad' data that productivity and profitability take a nosedive.
- If you know what constitutes bad data, why not automate the process of acting on it?

## Alerts & Workflow automation:

**If there are duplicate items in stock, put their details in an email and send it to the warehouse manager.**

|   |
|---|
| duplicate records (e.g., items)             |
| email addresses without '@'                 |
| orders . . . missing components             |
| POs . . . without a promise date            |
| job step started out of sequence            |
| PO status = 'complete'; BO qty > 0          |
| deposit amt < 'x' pct of order total        |
| invoices . . . without freight charges      |
| sales opp . . . for a client on credit hold |
| service requests . . . without an urgency   |
| jobs . . . without an owner                 |

# Process: Inactivity Detection

**Question #9:**

**Do you wish you could know sooner about clients who have stopped buying or items that have stopped selling?**

- Acting on the presence of data is one thing; acting on the absence of data is another.
- Knowing when a client stops buying, when a prospect has not been contacted, or when an item hasn't been sold – is critical.

**Alerts & Workflow automation:**

**If a client hasn't ordered in 30 days, notify their salesrep and send them a chart of the client's monthly sales.**

|                         |
|-------------------------|
| no customer orders      |
| no sales for items      |
| no POs for vendors      |
| no quotes by salesreps  |
| no jobs (projects)      |
| no contracts            |
| no client contacts      |
| no scheduled activities |

|                                 |
|---------------------------------|
| over 'x' dollars                |
| due to expire                   |
| within the <u>last</u> 'x' days |
| within the <u>next</u> 'x' days |



# Process: Anytime/Anywhere Alerts

**Question #10:**

**Do you need to notify staff at multiple addresses, or know when an alert has failed to reach its recipient?**

- When critical business activities occur, you need to know about them – here and now.
- But the “here” and “now” of alerts aren’t the same for every person; your location, device, work hours and work days are all different and are constantly changing.

**Alerts & Workflow automation:**

**If it’s between 5PM and 9AM, send alerts to our staffers’ personal email addresses.**

**Advanced Alert Considerations:**

|   |
|---|
| more than email (e.g., text, dashboard) |
| “home” versus “work”                    |
| weekdays vs weekends                    |
| work hours vs off hours                 |
| holidays                                |
| primary & secondary addresses           |
| alert failover                          |
| ‘responsible party’ alerts              |
| alert acknowledgements                  |

# Process: Triggered Updates

## Question #11:

**Do you need critical business conditions to auto-update your business applications?**

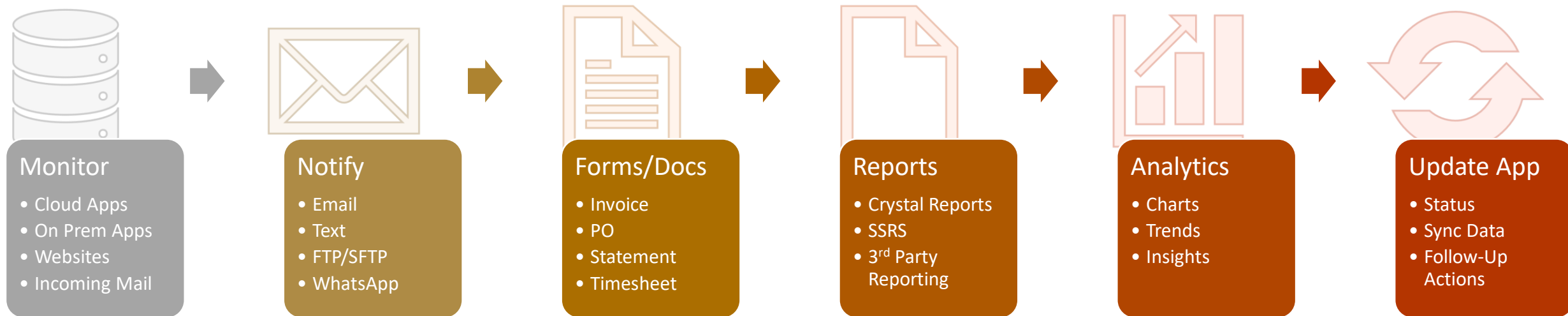
- Automation that performs “updates” needs to update both people and applications.
- Triggered application updates must include both updates to your ERP application as well as updates to your other business systems – such as CRM, HR, and related solutions.

|  |                                     |
|--|-------------------------------------|
| If a client is overdue . . .           | . . . change their credit status    |
| If an item is below its minimum . . .  | . . . create a PO for it            |
| If an order's discount > 25% . . .     | . . . put it on hold                |
| If an item isn't sold in 30 days . . . | . . . lower its price               |
| If a quote expires in 7 days . . .     | . . . schedule a follow-up call     |
| If a PO requires approval . . .        | . . . raise its urgency             |
| If an A/P check is > \$999 . . .       | . . . change its approval status    |
| If a job starts today . . .            | . . . create task in CRM            |
| If item gross profit < 20% . . .       | . . . remove it from the price book |

## Alerts & Workflow automation:

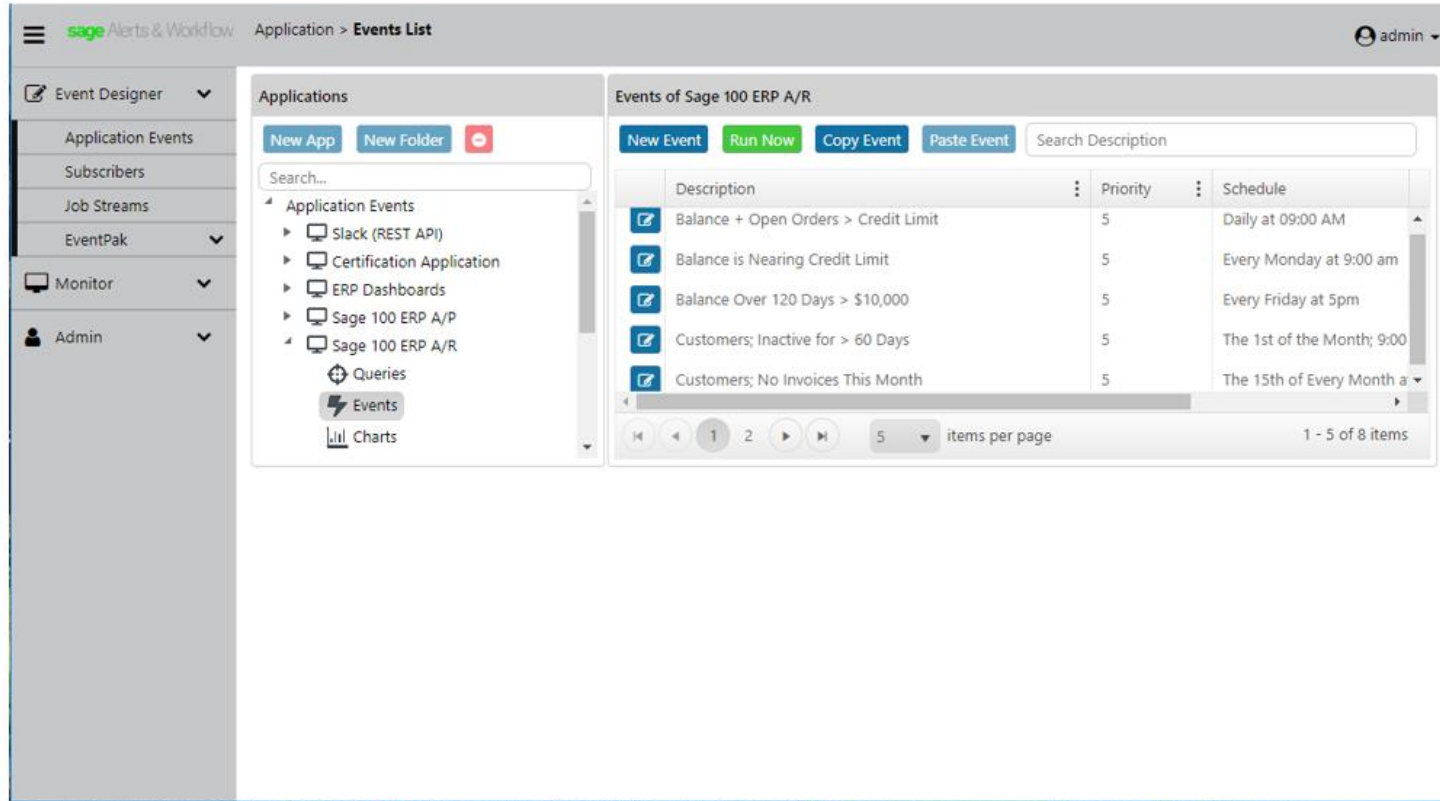
**If a client is > \$10k overdue, put them on credit hold.**

# How Does Alerts & Workflow Work?



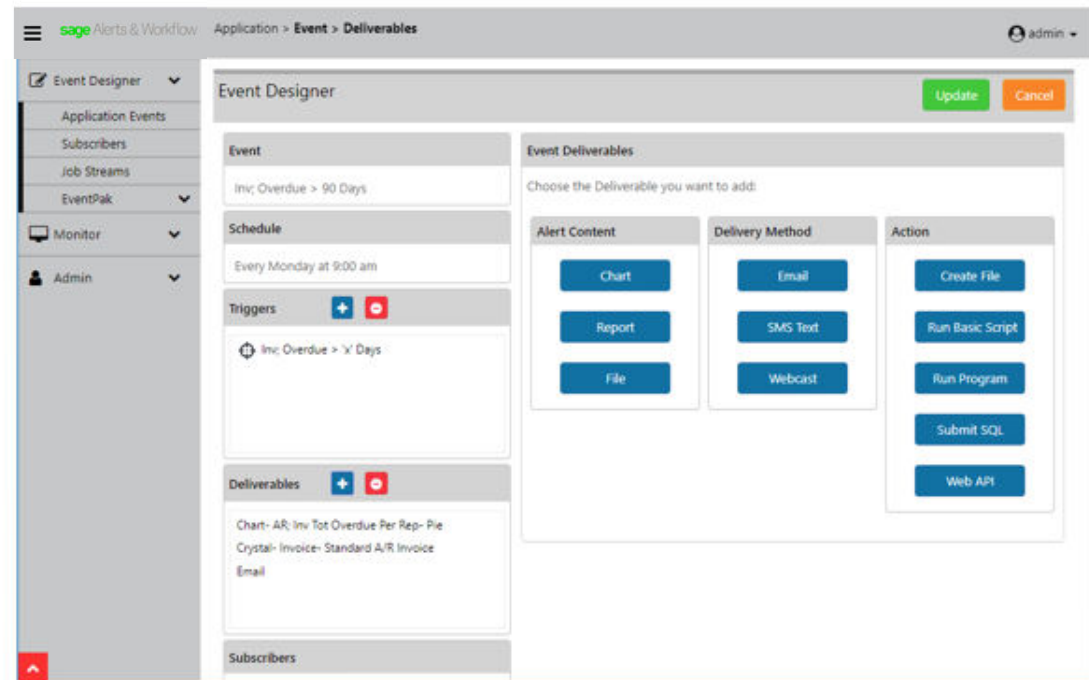
# User Interface

Let's start with the "biggest picture" item – the application's new user interface:



The application is 100% browser-based; its four modules (Event Manager, Navigator, Administrator & the Monitor) are now all accessed from this one, friendly UI. The five components of every event are shown in the shaded areas on the left:

# Architecture



As important as this new “look-and-feel” is, it wouldn’t matter a bit if the underlying architecture had not also been updated accordingly. KnowledgeSync version 10 . . .

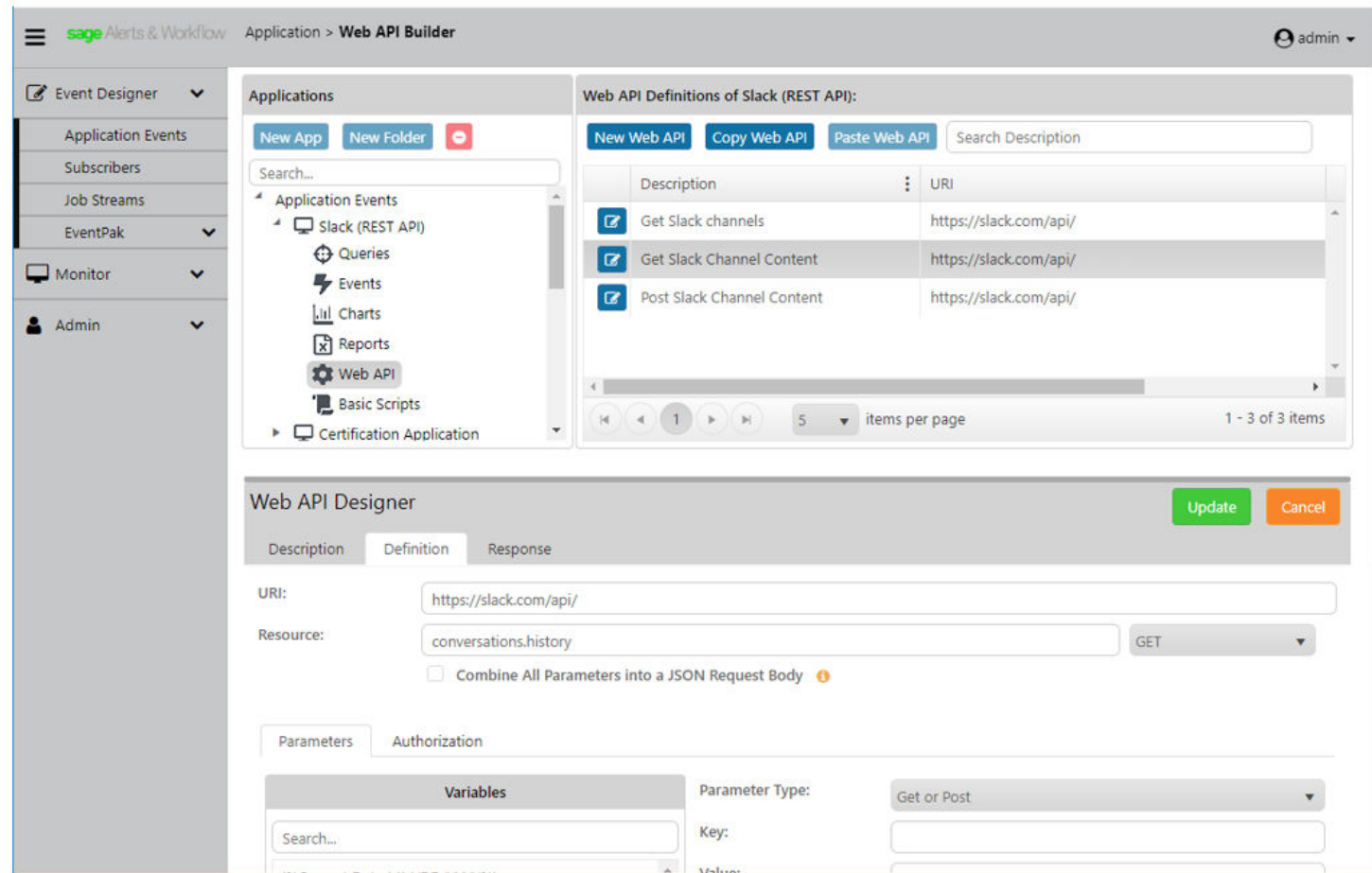
- . . . uses a SQL database
- . . . is built on a .NET foundation
- . . . runs under IIS
- . . . is a 64-bit application

## Version 10 of Sage Alerts & Workflow features include:

- Native SMS alerting
- Report generation via Microsoft SQL Server Reporting Services
- A more powerful chart design module
- A more powerful Visual Basic scripting tool
- Sending standard forms, charts, reports, and files via Secure FTP (SFTP)
- Multi-Tenancy has been expanded and includes “Roles” and “Users” definitions
- OLE/DB has been added as a connection method for queries
- .NET Provider has been added as a connection method for queries
- When building a query, you can “quick-search” for specific table and column names
- Drag-and-drop is supported when selecting query and event components
- An event may be triggered by a combination of data returned from queries and from web APIs
- An HTML editor has been added to the Email alert message design option
- The Event Monitor includes date-sensitive selection criteria, access to expanded triggered event details, and HTML alert message display

# REST API

The biggest of all enhancements put into version 10 is the support of web services via a REST web service API that allows for connectivity to web-based applications and may be used as both triggers for an event and as actions that are executed once an event is triggered.





#### ❑ Cloud-Based Technology

- 64 Bit Application Built on .NET Foundation
- Hosted on Microsoft Azure Public Cloud
- Supports Multiple Tenants
- Automatically Scales
- Updates Applied For You

#### ❑ Enterprise-Wide Monitoring and Response

- Can Connect to Any Supported Database
- Can Connect to “Home Grown” Applications
- Can Monitor Information on Websites

#### ❑ EventPaks

- Set of Pre-Populated Events
- Email Alerts (by Default)
- Text Messaging, FTP, or Dashboards
- Edit to Activate and Indicate Recipients
- Can Copy, Edit, and Create Additional Events

#### ❑ Connects to Cloud AND On-Premise Applications

- Multiple Connection Methods (SQL, ODBC, OLE-DB, REST web API)
- Can Also Monitor and Respond BETWEEN Both Environments
- SQL and ODBC



# Alerts & Workflow

## Alerts In The Cloud



ALERTS



REPORTS



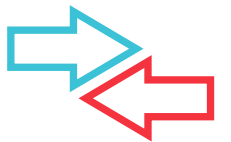
ACTIONS



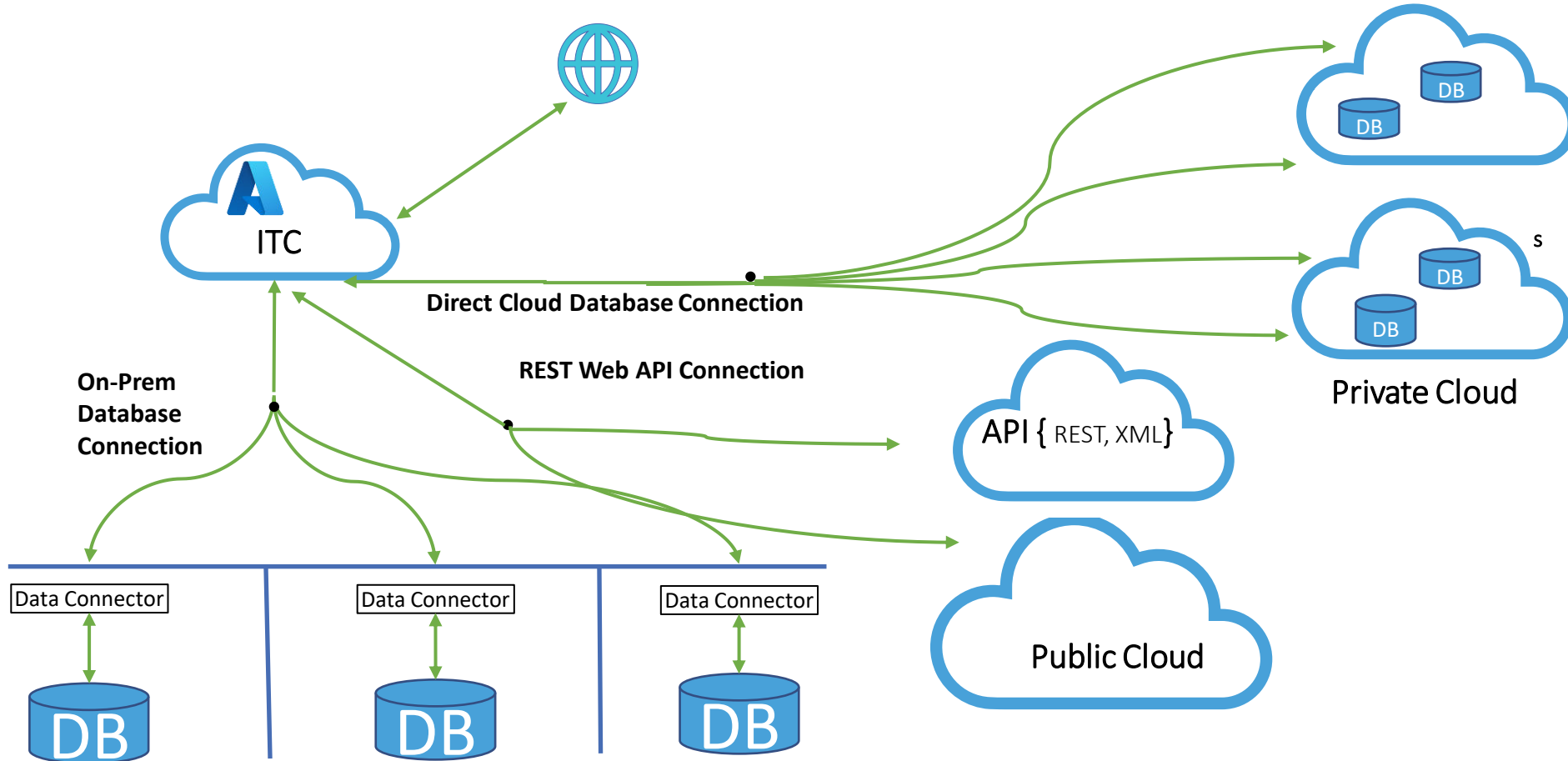
Detect



Inform



Respond



So . . . if you've determined that you could benefit from Sage Alerts & Workflow, you next need to determine whether you can afford it. . .

and be ultra-conservative:

If A&W saves one person of your Team  
just 15 minutes a day . . .

(that savings is                      \$175/month)

# Sage Alerts & Workflow starts at \$120/month

The **Alerts Module** is the base product and must be purchased. It provides the ability to monitor a single application for an unlimited number of business conditions and (when those conditions are met), Sage Alerts & Workflow can deliver an unlimited number of alerts (via email, text message, FTP, and web dashboard) to an unlimited number of recipients, both within and outside of an organization.

SAGE Cross sell pricing pages:

Alerts Enterprise Edition \$120.00 per month

The **Reports Module** (optional) allows Sage Alerts & Workflow to run reports (Crystal & SSRS) as well as generate graphical alerts (bar & pie charts). Reports can include standard forms and documents, and may be run either on a scheduled basis (e.g., daily at 9 AM) or on a triggered basis (e.g., run an A/R Aging report when a client exceeds 90% of their credit limit). This module is purchased once and applies to all the "connections" a client has purchased (see "Additional Connections" below.)

SAGE Cross sell pricing pages:

Reports Module \$95.00 per month (only purchased once regardless of how many connections)

The **Workflow Module** (optional) allows Sage Alerts & Workflow to add or update information in one or more application databases; this is done using a selection of APIs that include a REST web service API, the ability to run SQL statements & stored procedures, and the ability to run Visual Basic scripts. The Workflow Module also includes the ability to export "triggered event" data to a flat file. This module is purchased once and applies to all the "connections" a client has purchased (see "Additional Connections" below.)

SAGE Cross sell pricing pages:

Workflow Module \$95.00 per month (only purchased once regardless of how many connections)

**Additional Connections** (optional) are used when a client wishes to monitor conditions in more than one application; each additional "connection" allows a customer to monitor the data within an additional application. A client can purchase a second, third, or fourth connection -- once a client reaches '4' connections, they are automatically granted an "unlimited" connection license which allows them to monitor data in an unlimited number of application databases, as well as monitor the content of incoming email messages. (If a client wishes to monitor the content of incoming email but does not have "unlimited" connections, they may purchase a single additional connection and use that to monitor incoming email.)

SAGE Cross sell pricing pages:

Additional connections \$95.00 per connection, once you have added 3 additional connections bring the total connections to 4 you are then licensed as unlimited.

## sage Alerts & Workflow

By Sage Product

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



# Are you listening to your business?

*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.*



### 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.

**Does your organization need Alerts & Workflow?**

[Click here to find out!](#)

***“A system of ‘actionable insight’ is the best means by which you can increase the responsiveness of your organization and differentiate yourself from your competition.”***



Greg Swallow

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