Actionable Insight – 10 Ways to Improve Your Business

Alerts & Workflow

Sage Tech Partner Plus

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Actionable Insight: The 3 Value Propositions

1. **Automate the <u>detection</u> of critically-needed information**

   You know 75% of what you need to know.

2. **Automate the <u>delivery</u> of that information.**

   "Push" <u>what</u> people want, <u>how</u> they want it & <u>when</u> they need it.

3. **Automate the process of <u>acting</u> on that information**

   Since you often know "when <u>this</u> happens, then do <u>that</u>", automate the "**<u>then do that</u>**" 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 '<u>this</u>' activity or condition happens, then do '<u>that</u>'.

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**

For Example, with FAS . . .

- **If a new asset is acquired, then add check in date or checked out date**
- **If a warranty date is coming due, then notify finance**
- **If schedule service needs performing, then e mail reminder**
- **If an equipment lease is about to expire, then generate a lease history report and request a renewal quote from the leasing company**
- **If , getting within 10% of budget then notify project manager**

What Are the Benefits of **Alerts & Workflow?**

By automating your "**if – then**" business processes, Alerts & Workflow gives you <u>three benefits</u>:

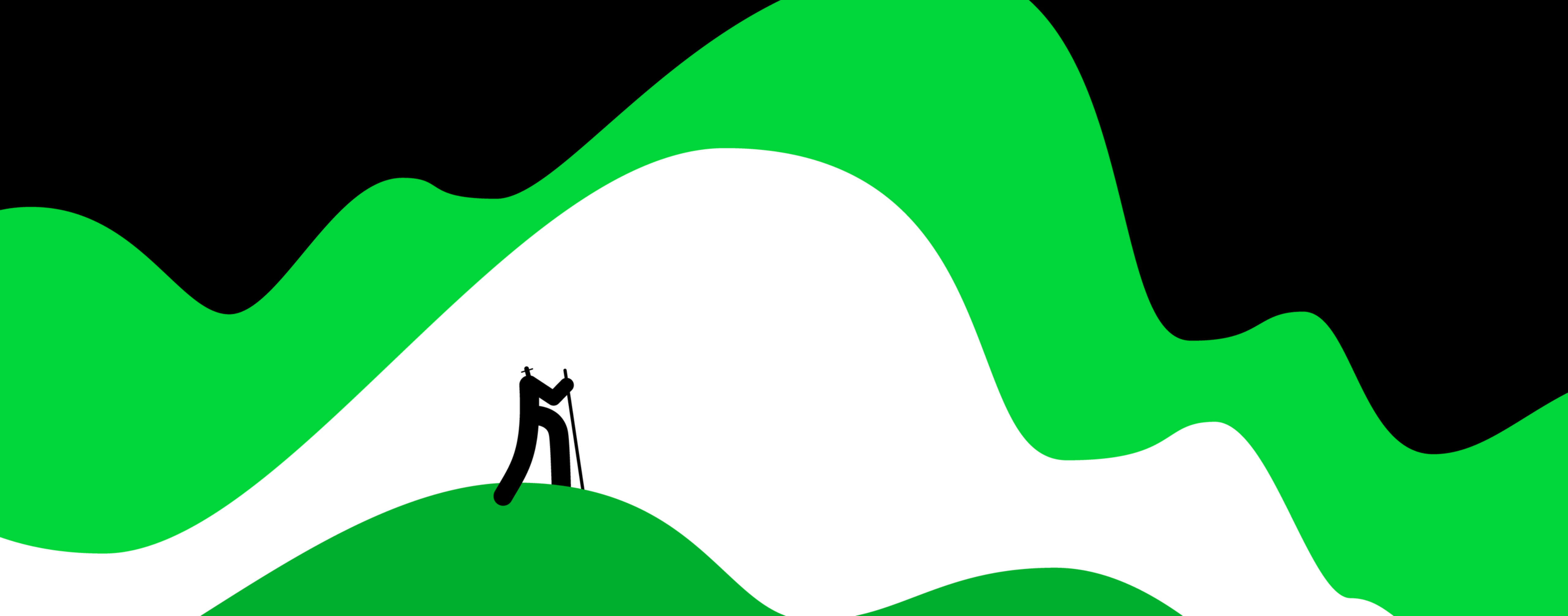
1) **It saves you time**. A&W automates tasks currently being done <u>manually</u>. ("collecting on past-due invoices".)

2) **It makes you more responsive**. Many business scenarios are time-sensitive and often don't get done <u>soon enough</u>. ("stock shortages".)

3) **It increases your knowledge**. You don't have the time to look into <u>all</u> 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 Invoices Statements Dunning Notices
Inventory	Picking Lists Receipts Transfers Physical Counts
Purchasing	Purchase Orders **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
Terms

"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 <u>next</u> 'x' days", "within the <u>last</u> 'y' days", or "<u>more</u> 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

is assigned to:	is sent to:	is approved by:
. . . 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	has changed to more than $10,000
credit status	has changed to 'Hold'
item cost	has changed
assigned rep	has changed to 'Greg Swallow'
status	has changed to 'complete'
priority	has changed to 'urgent'
due date	has changed
promise date	has changed
discount	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 last 'x' days
within the next '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.

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How Does Alerts & Workflow Work?

Monitor
- Cloud Apps
- On Prem Apps
- Websites
- Incoming Mail

Notify
- Email
- Text
- FTP/SFTP
- WhatsApp

Forms/Docs
- Invoice
- PO
- Statement
- Timesheet

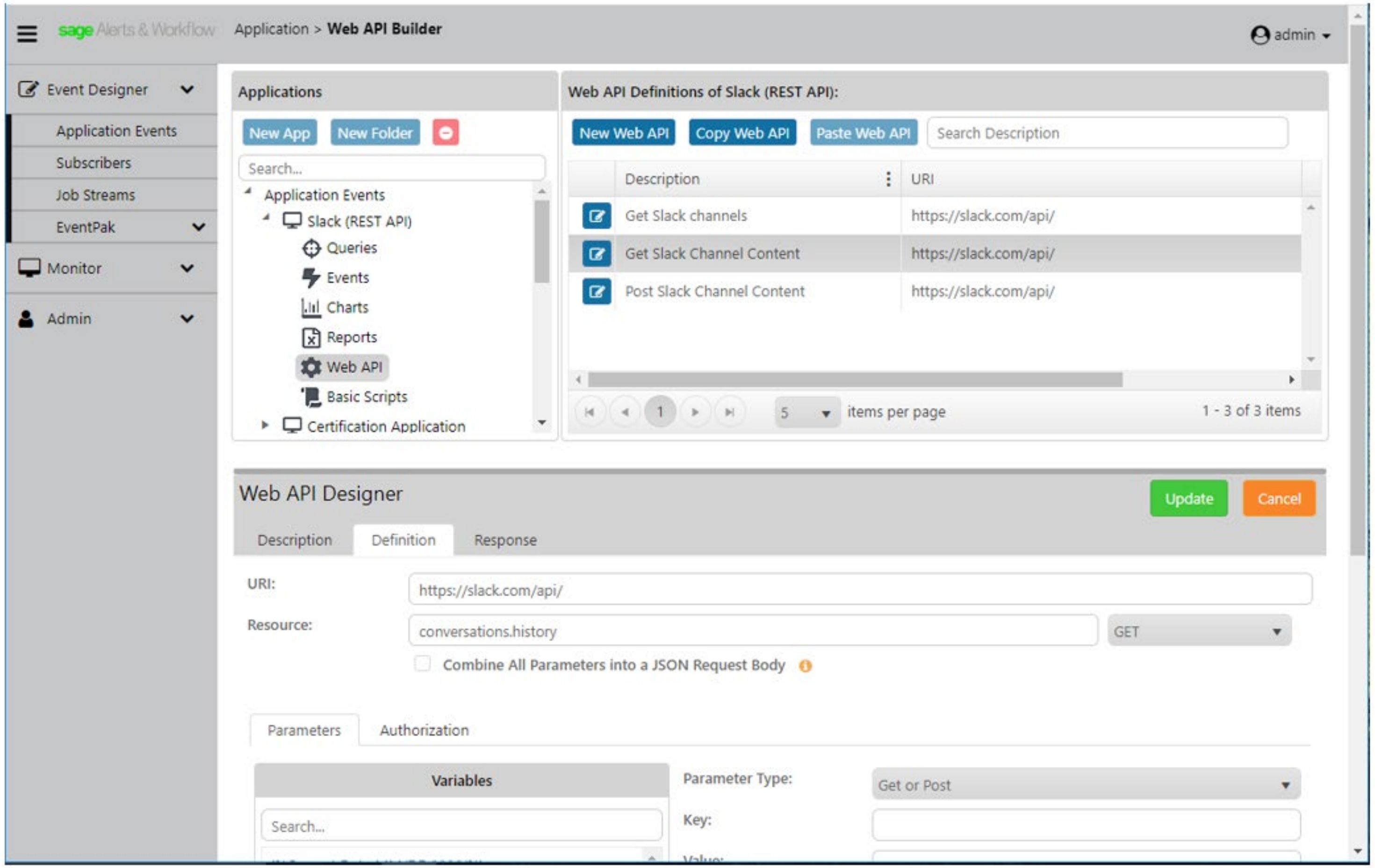
Reports
- Crystal Reports
- SSRS
- 3rd Party Reporting

Analytics
- Charts
- Trends
- Insights

Update App
- Status
- Sync Data
- Follow-Up Actions

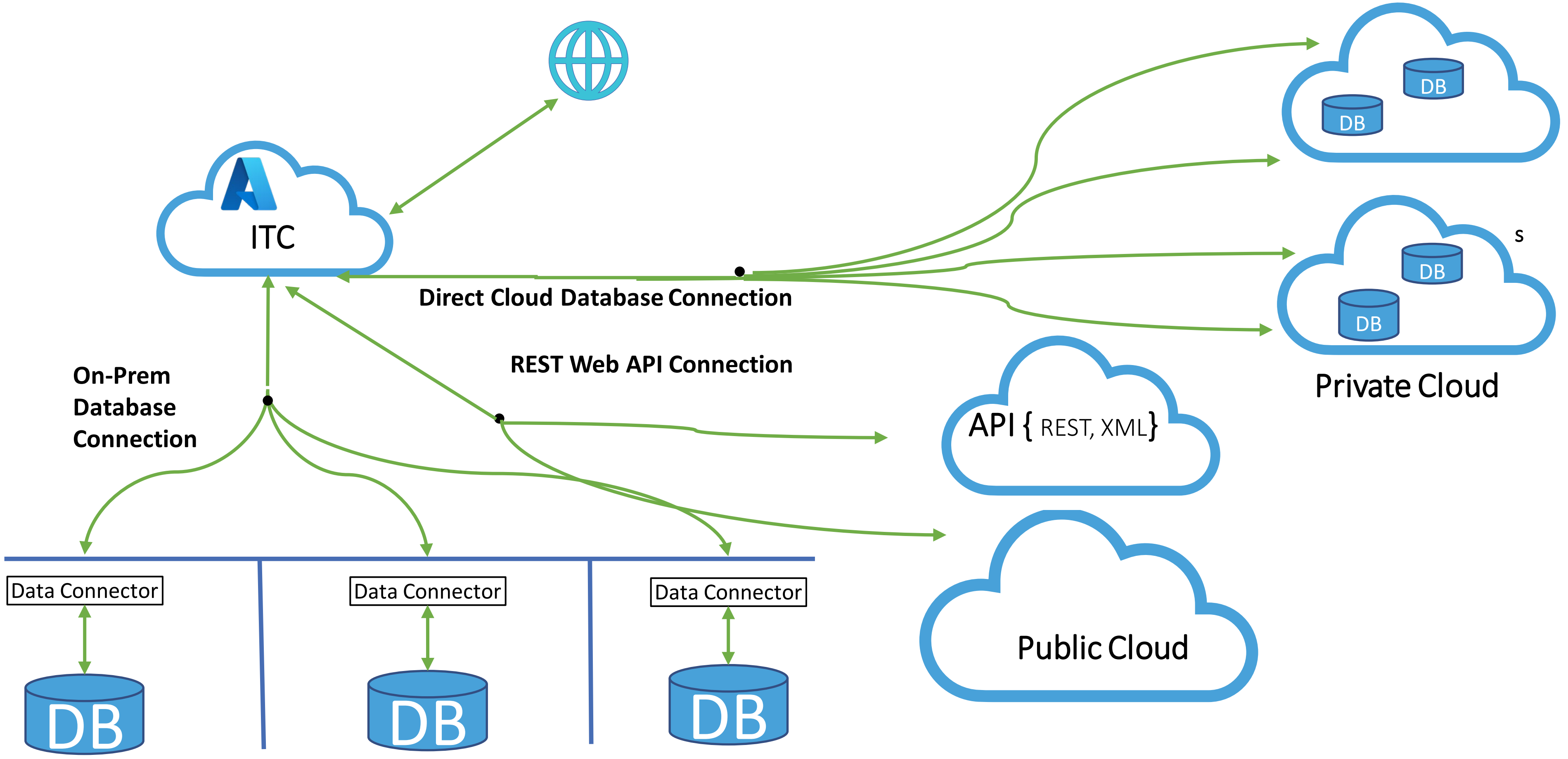
REST API

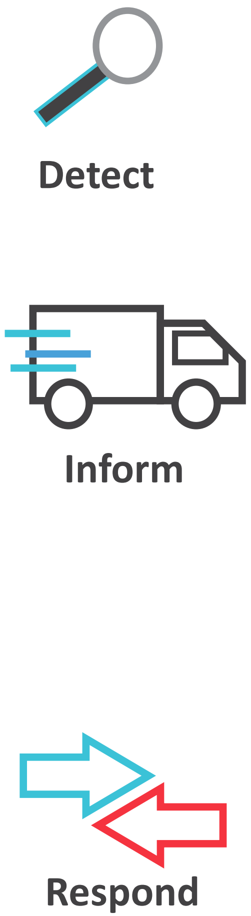
The biggest of all enhancements put into version 10 is the support of web services via a REST web service API that allows for connectivity to web-based applications and may be used as both triggers for an event and as actions that are executed once an event is triggered.



Alerts & Workflow

Alerts In The Cloud





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 <u>one</u> person of your Team
just <u>15 minutes</u> a day . . .

(that savings is $175/month)

Sage Alerts & Workflow starts at $120/month

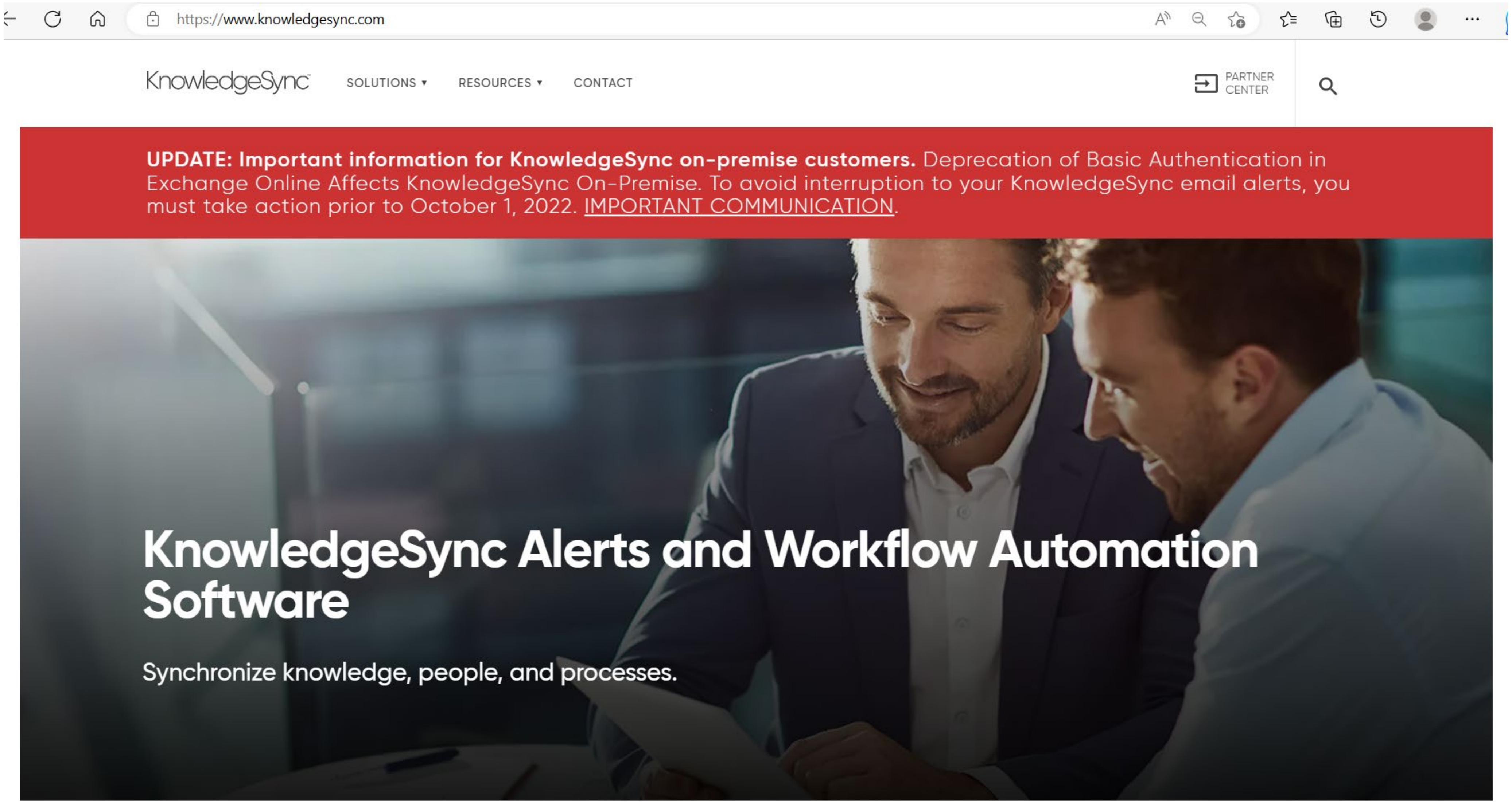
The **Alerts Module** is the base product and must be purchased. It provides the ability to monitor a single application for an unlimited number of business conditions and (when those conditions are met), Sage Alerts & Workflow can deliver an unlimited number of alerts (via email, text message, FTP, 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 includes 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 connecting bring the total connections to 4 you are then licensed as unlimited.


https://www.knowledgesync.com
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SOLUTIONS
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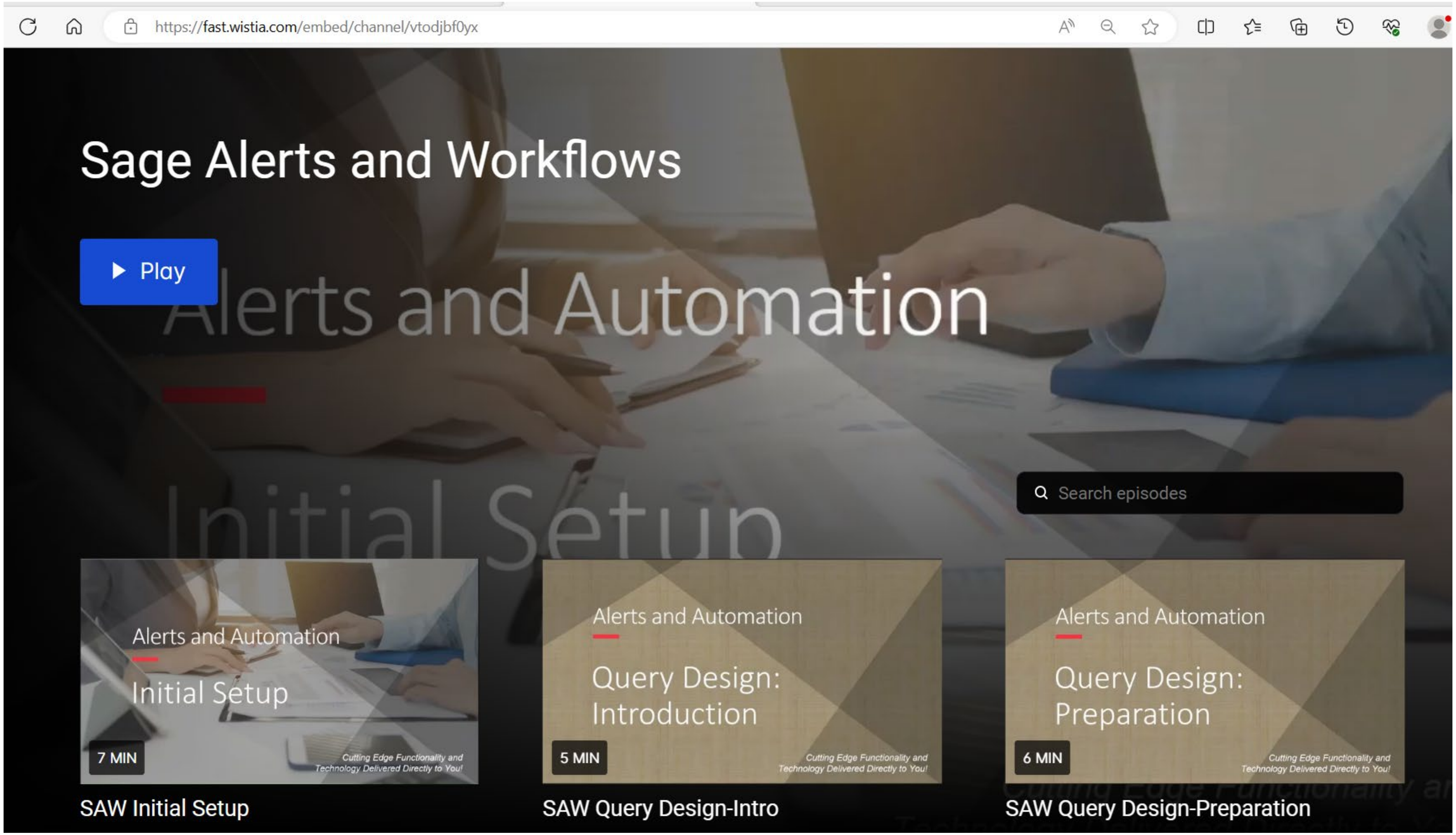
PARTNER CENTER
UPDATE: Important information for KnowledgeSync on-premise customers. Deprecation of Basic Authentication in Exchange Online Affects KnowledgeSync On-Premise. To avoid interruption to your KnowledgeSync email alerts, you must take action prior to October 1, 2022. IMPORTANT COMMUNICATION.
KnowledgeSync Alerts and Workflow Automation Software
Synchronize knowledge, people, and processes.

[Sage Alerts and Workflows (wistia.com)](https://fast.wistia.com/embed/channel/vtodjbf0yx)



“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.”

Business Activity Monitoring (BAM) is a process that enables organizations to track and analyze key performance indicators (KPIs) in real-time or near-real-time. BAM tools collect data from various sources such as software systems, databases, and sensors, and then use that data to provide actionable insights into the performance of the organization's business processes.

The primary goal of BAM is to provide business leaders with real-time information that can help them make informed decisions, identify potential issues, and take corrective actions when needed. BAM can also help organizations improve their overall efficiency and effectiveness by identifying bottlenecks, inefficiencies, and other areas for improvement.

With Sage Alerts & Workflow, businesses can automate tasks such as sending notifications to employees or customers, updating databases, generating reports, and more. It can integrate with a variety of enterprise applications, including CRM systems, ERP systems, accounting software, and others, to provide a comprehensive view of business operations.

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