Brochure

# Sage Alerts & Workflow

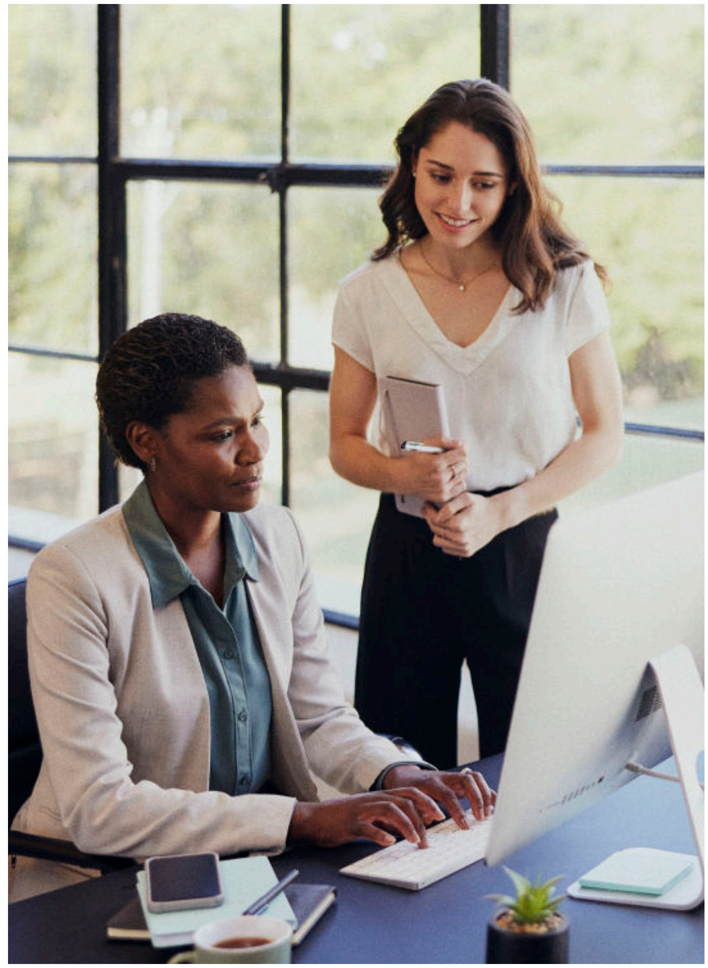
Data-driven insights for business-critical decisions

Sage

# Making data-driven business decisions

## Sage Alerts & Workflow

In a world where ‘data-driven’ businesses are making faster, smarter, and more context-aware decisions, can you afford to ignore one of your most valuable assets?



By empowering your data to alert the right people, in the right place and at the right time, to businesscritical conditions, you’ll always be ready to react.

You’ll be able to make fast, contextual decisions that drive growth, delight customers, and make the most of opportunities.

Sage Alerts & Workflow automatically monitors your business applications in real-time and performs alerts, report distribution, and workflow, based on your specific business conditions, allowing you to focus on keeping your organization on track for success.

By observing your enterprise system for critical, time-sensitive business conditions, such as overdue invoices or unfulfilled orders, you can keep the right people informed when and where it’s needed most. By automating best practices, you can streamline routine manual processes to save time better spent on higher value goals, like growing your business.

Sage Alerts & Workflow works seamlessly with several core Sage products, including 100cloud and 300cloud, enabling you to be more productive, confident and agile.

You can be up and running with Sage Alerts & Workflow in less than a day, including full compatibility with all standard email providers. It requires no technical knowledge to use, but should you want to build on its pre-configured business alerts, it gives you the flexibility to create your own unlimited number of context-aware events.

# Real-time, actionable data

## Sage Alerts & Workflow is an invisible assistant and advanced warning system for business-critical issues such as stock shortages, overdue invoices and inactive leads.

An enterprise-wide application, it integrates with existing business systems and apps and triggers alerts to staff, partners and clients via email, fax, pager, instant messenger, Twitter or via the dynamic dashboard.

**More than just reminders**
Sage Alerts & Workflow streamlines operations by automating manual processes; invoices, customer statements and many more standard forms and documents. In addition, it extends to updating Sage applications with key details and activities such as placing overdue clients on hold or scheduling followup calls for customers with no activity.

The application comes with a series of out-of-the-box alerts but additional modules allow businesses to fully customize these preconfigured events to create an unlimited number of events to suit individual needs. There are over 50 EventPaks available, free of charge, as part of Sage Alerts & Workflow.

**Simple reporting**
Reporting is simplified with Sage Alerts & Workflow, the solution automatically generates key analytical reports including sales pipeline, vacation and sick time, aged receivables, open payables and many more, providing the insight needed to make strategic decisions. In addition, these reports can be 'exception based', delivering only the most critical information that requires urgent attention.

**Easy to use**
Downloading in less than 5 minutes and installing in less than 10 and with no technical knowledge required to use, the application can be working in less than a day.

Expert technical support is provided via web or phone with access to Knowledgebase for troubleshooting, technical questions and tips.

**Sales Tool**
- Prospect management
- CRM integration
- Monitoring sales opportunities
- Lead management
- Exception management to maintain integrity of CRM data

**Finance Tool**
- Automatically generate and send invoices
- Monitor stock levels and raise purchase orders
- Overdue payment management
- Maintain financial data integrity
- Finance and sales system integration

**Marketing Tool**
- Monitor client-centric systems and identify prospects
- Deliver compelling offers according to KPIs
- Campaign monitoring and optimization
- Automate prospect follow-up

# Why Sage Alerts & Workflow?

Sage Alerts & Workflow is your invisible assistant for your business data.

**Pay and get paid on time**
Track your A/R and A/P data electronically and create automated responses for:

- Overdue client invoices
- Expiring discounts
- Stagnant accounts

**Monitor inventory activity**
Automate inventory tracking across the entire product lifecycle, including:

- Stock levels
- Initial purchase
- Delivery
- Storage
- Sales

**Track and address inactivity**
Stay proactive and gain valuable insights into idle business conditions including:

- Inactive customers
- Projects
- Stock items

**Keep your reps informed.**
Help your reps sell more with contextual insights, and automatically notify clients of:

- Shipment delays
- Deliver quotes before expiry
- Monitor changes in prospect habits

**Manage errors and exceptions.**
Identify, manageand respond to errors and exceptions fast with automatic alerts for:

- Duplicate item numbers
- Missing email addresses
- Below-limits profit margins

**Stay alert 24/7.**
Monitor all your modules and data with unlimited capacity for companies, business conditions, triggered alerts, and recipients including:

- 85 pre-configured business conditions for Sage 100cloud
- 55 pre-configured business conditions for Sage 500

# Additional Modules

**Reports Module**

- Use Crystal Reports to generate and deliver forms and documents, such as invoices, statements, and purchase orders
- Generate and deliver automated reports
- Dynamically trigger and deliver analytical reports based on business conditions
- Generate and deliver graphical alerts, such as line charts that track sales history

**Workflow Actions Module**

- Trigger updates to the Sage ERP database, such as putting a past due client on credit hold
- Trigger updates into other applications based on what's happening in Sage ERP, like scheduling a phone call in a CRM app for a client who is past due
- Take data from the Sage ERP system and move it into another application
- Integrate with Sage Intelligence and Sage Enterprise Intelligence

**Additional Connections**

- Monitor conditions in applications other than Sage ERP by purchasing "connections" for each application, such as tracking, auto- processing, and responding to incoming messages in your email client

**Alerts & Workflow Client Access License(s)**

- Enable individual users to connect and manage the Alerts & Workflow system from the convenience of their own local PC without having to log onto the main server

MicroAccounting

Sage Partner

**microaccounting.com**
**855-876-3773**