Live Webinar:

Alerts & Workflow for Sage 100 ERP
Business Activity Monitoring

Start Time: 2:00 pm ET

For Telephone Audio
Dial: 1 (480) 297-0022
Access Code: 220-417-922
Audio PIN: Shown on your Webinar Panel

Technical Difficulties
Call: (805) 617-7000 (Option 1)
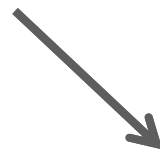*Webinar ID*: 518069870

Today's Presenters

Howard Finestone, *Net @Work*

Sage 100 ERP - Practice Director

Don Farber, *Vineyardsoft Software*

Product Specialist

Webinar Details

- Presentation is roughly 1 hour
- All phone lines are muted
- If anyone has any questions during this webcast – please type them in your question box located at the bottom of your webinar panel

Net@Work Solutions - Overview

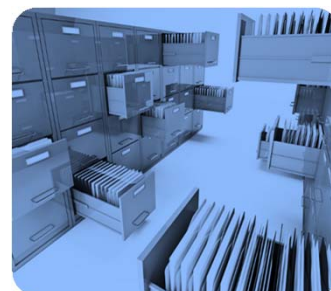ERP/Accounting System Implementations

CRM System Implementations

HRMS/Employer System Implementations

Nonprofit Solutions

Web / Mobile Development & eCommerce

ECM Implementations

Business Intelligence, Analytics & Reporting

IT Infrastructure, Cloud & Managed Services

Ask Yourself . . .

. . . during your everyday business activities, have you ever felt like saying . . .

. . . if only we had known . . .?

If Only We Had Known . . .

". . . that Ace Ltd has overdue invoices totaling $7,500."

". . . that this client had decreased their purchases from us."

" . . . about those excessive discounts."

". . . the lease was about to expire."

". . . that no one approved this PO."

". . . that our supplier raised their price by 30%."

". . . about the shipment that could fulfill those backorders."

". . . she was closing a new sales for a client who was overdue."

" . . . that this price list was from last year."

The Information Age

. . . is now the "information-<u>overload</u>" age.

Data-Driven

A "data-driven" organization is one in which your business data <u>pro-actively</u> drives the decisions and actions of your company.

Reversing the Flow

Don't go *looking* for data.

Empower your data to automatically come to you – to communicate business conditions and to act on those changing conditions as they occur.

The Voice of Your Data

When Your Data Has No Voice . . .

Your managers spend too much time wading through voluminous reports *looking* for data.

Non-managerial staff have <u>no time</u> to use reporting & analytical tools because those can be "time-devouring" black holes.

So . . .

. . . if you can identify **what** it is you want your data to tell you, **when** you need it told, **how** you want it delivered, and **whom** you want it delivered to, then you have enabled your organization to become "data-driven".

When We Know . . .

"... a customer is overdue ... *re-send them their invoices.*"

"... a client has decreased their purchases ... *notify their salesrep.*"

"... there are excessive discounts ... *put the order on hold.*"

"... a lease is about to expire ... *notify the vendor.*"

"... that a PO is un-approved ... *alert our CTO.*"

"... a supplier has raised their prices ... *send a chart of the increases.*"

"... a delivery could fulfill backorders .. *deliver a report of those orders.*"

"... a potential sale is for an overdue client .. *notify the salesrep.*"

"... we have a new price list ... *distribute it to all staff.*"

Data-Driven Technology

Give Your Data a Voice via:

-- Automated Monitoring   (to look for relevant business conditions)

-- Alerts   (to tell people about these conditions)

-- Reports & Forms   (to include relevant content in the alert)

-- Workflow   (to update your applications)

What happens if you are *not* Data-Driven?

The Pain: Bad Debt

Scenario:

- A customer with net 30 terms

- They have $30k over 45 days old, but …

  … you don't know it because you run your reports <u>at month-end</u>

- Today you ship them a $25k order

- At month-end you discover the problem . . .

"If only I had known!"

Cost of <u>not knowing?</u>

- **Best case**:   Carrying $55k in A/R
- **Worst case**: Writing off $55k when they close shop

The Cure: Alerts & Workflow

To avoid this, you need a solution that . . .

✓ . . . re-sends the client their overdue invoices & statement

✓ . . . runs & delivers the A/R Aging report on this client

✓ . . . notifies the account manager

✓ . . . alerts your finance dept

✓ . . . puts the client on credit hold

"I'm so glad I knew."

This solution is:

Sage Alerts & Workflow

Background

Introduced in 1999; sold across Sage product lines

-- A "Business Activity Monitoring" (BAM) solution

-- "A smoke detector for business data"

-- Over 10,000 clients worldwide

Its History:

-- TMCLabs "Editor's Choice"

-- Sage OEM of the Year (3 years running)

-- Partner's Choice Award

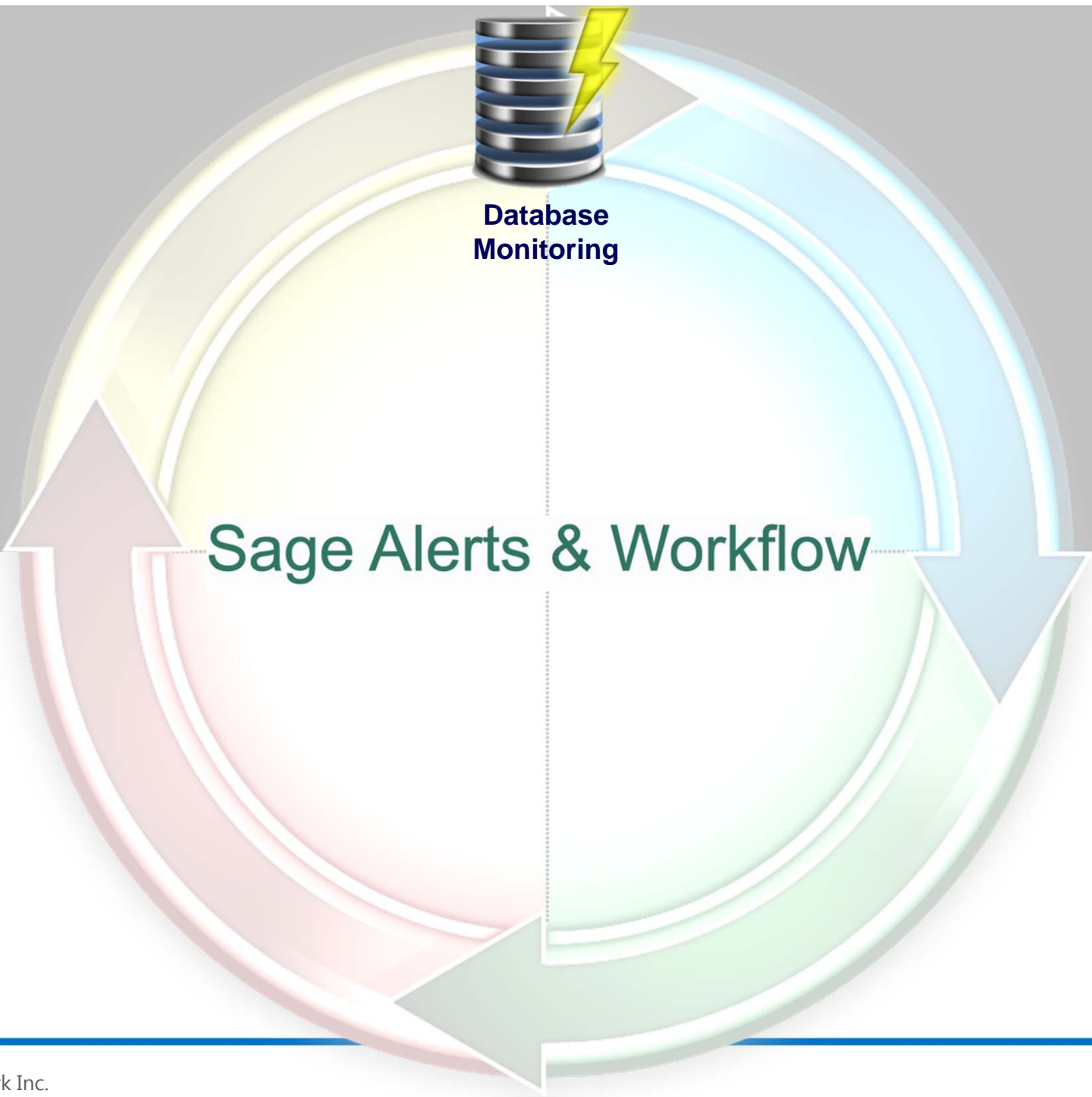-- VARBusiness Five-Stars

-- Forbes' "Top Productivity Enhancing Tool"

Sage Alerts & Workflow

Database Monitoring

Data-Mining

ERP Business Conditions

- ✓ Overdue receivables
- ✓ Late deliveries
- ✓ Discounts about to expire
- ✓ Stock approaching re-order
- ✓ Unapproved discounts
- ✓ Overstocks
- ✓ Clients not ordering
- ✓ Clients put on / taken off hold
- ✓ Clients changing their buying habits

- ✓ Project delays
- ✓ Cost overruns
- ✓ RMA alerts
- ✓ Gross margin too low
- ✓ Order configuration errors
- ✓ Changes to project start/end dates
- ✓ Tasks requiring approval
- ✓ Special pricing begins/ends

Monitor ERP and
Other applications
(CRM, HR, any db)

Sage Alerts & Workflow

Data-Mining

Other Business Conditions

Sales activities . . .

- ✓ Sales opportunities overdue for closing
- ✓ Customers changing their buying habits
- ✓ Contracts that are due to expire

Customer Service . . .

- ✓ Calls not responded to for 'x' hours
- ✓ Too many calls assigned to one rep
- ✓ Calls in danger of missing their SLA

Human Resources . . .

- ✓ Changes to an employees benefits
- ✓ New hires / terminations
- ✓ Upcoming employee reviews

Data-Mining

E-Mail
Monitoring

Database
Monitoring

Sage Alerts & Workflow

Email Monitoring

Alerts & Workflow monitors and auto-processes incoming email and website form submissions, such as . . .

- ✓ Emails sent to your customer service dept

- ✓ "Generic" messages sent to "info@" or "sales@"

- ✓ Emails with questions on an order's status

- ✓ Shipment-related emails from your suppliers

- ✓ Website requests for product information

- ✓ Website registrations for class enrollments

- ✓ Website downloads of trial software
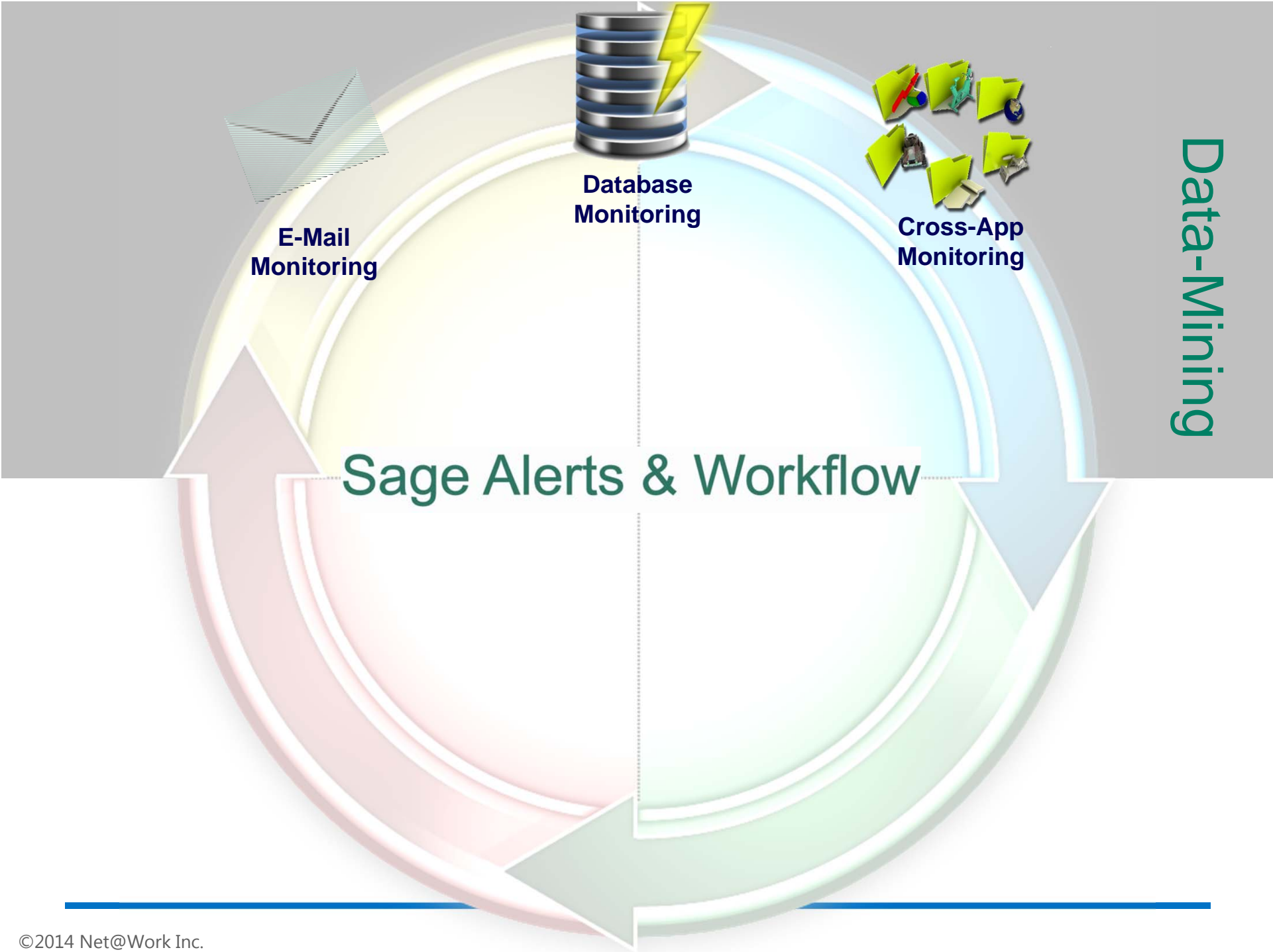
info@
acme.com

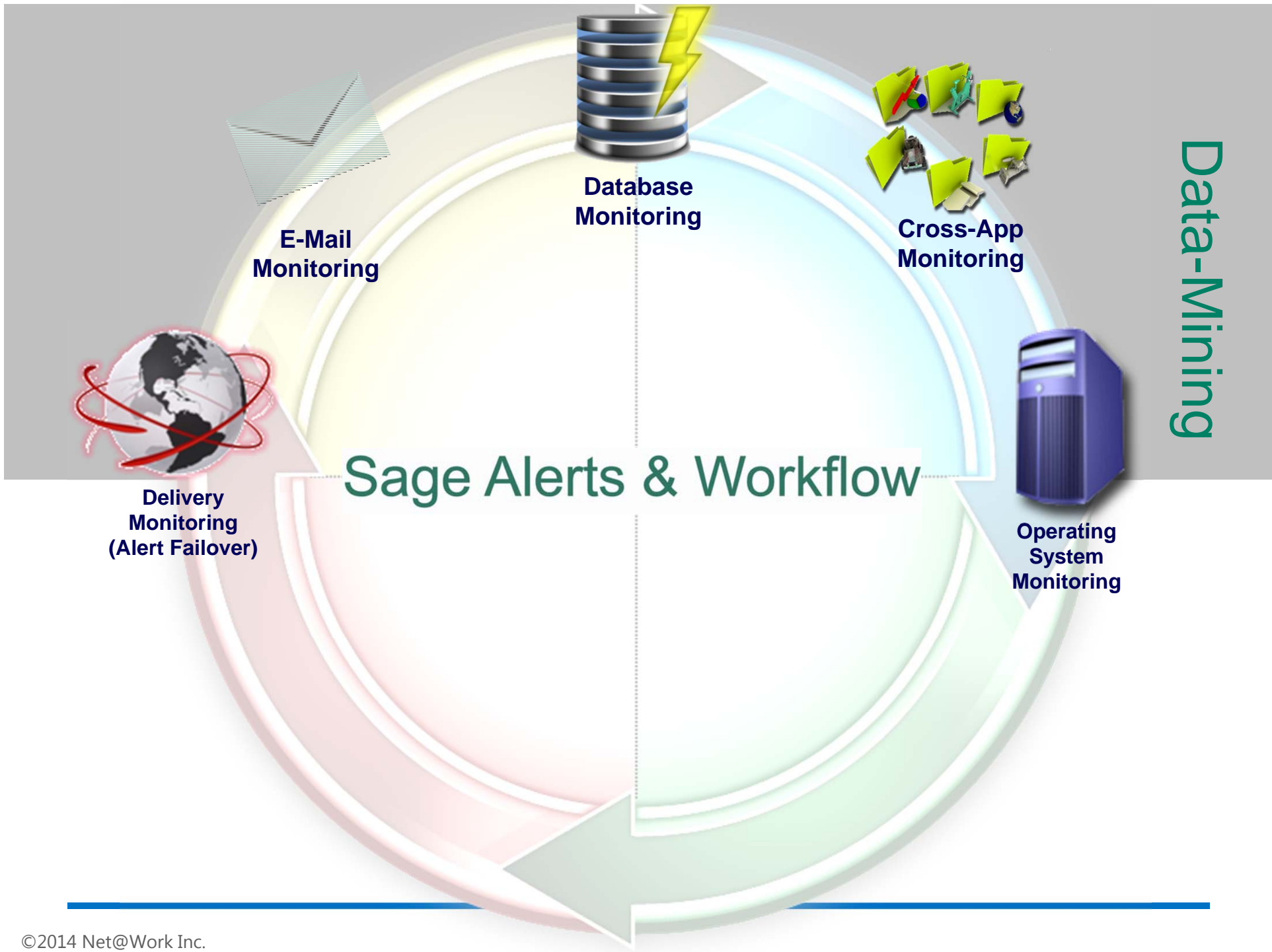support@
acme.com

Order-status@
acme.com

sales@
acme.com

Data-Mining

E-Mail
Monitoring

Database
Monitoring

Cross-App
Monitoring

Sage Alerts & Workflow

Cross-Application Monitoring

Sage Alerts & Workflow can <u>combine</u> and analyze data, such as calculating whether a new sales opportunity in CRM would put a client over their credit limit based on information in the ERP system.

Any CRM   **Sage ERP**

Enterprise-Wide
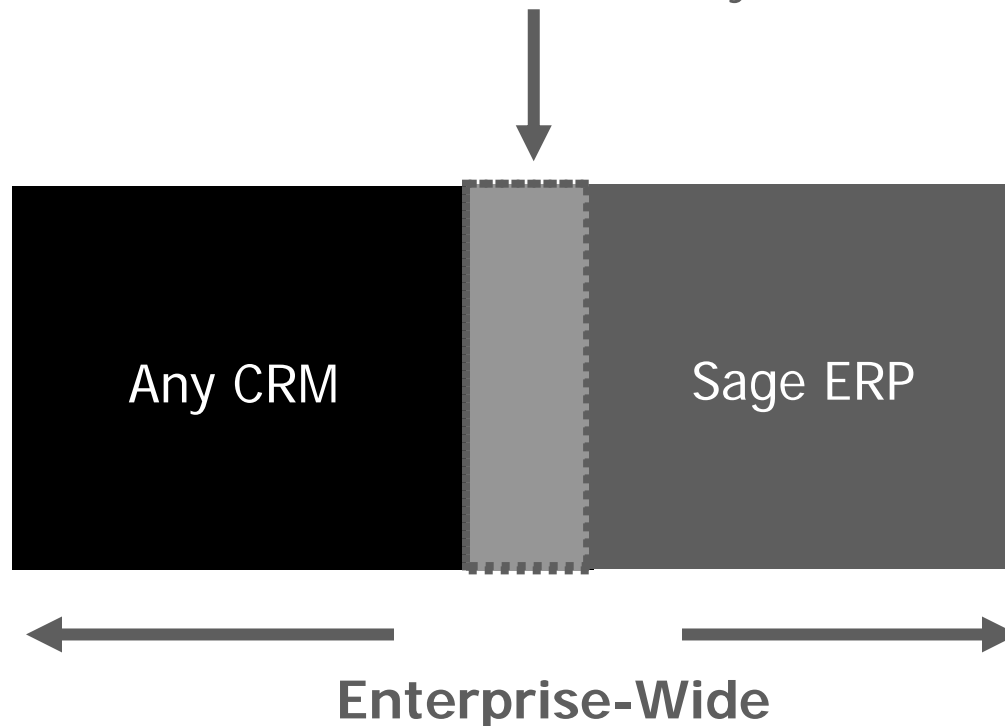
Database
Monitoring

Cross-App
Monitoring

E-Mail
Monitoring

Data-Mining

Delivery
Monitoring
(Alert Failover)

Sage Alerts & Workflow

Operating
System
Monitoring

sage
Data-Mining

Database
Monitoring

Cross-App
Monitoring

Monitoring

Sage Alerts & Workflow

Delivery
Monitoring
(AWS Monitoring
Itself)

Operating
System
Monitoring

Response

**Triggered
Alerts**

Email   **Pop-Up**
FTP   **Smart Phone**
Fax   **Twitter**   **Web**

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

Twitter

ftp

sage

Data-Mining

Database Monitoring

Cross-App Monitoring

Monitoring

Delivery Monitoring (AWS Monitoring Itself)

Operating System Monitoring

Sage Alerts & Workflow

Response

Triggered Alerts

Invoice

Sales Analysis

Stock Status

crystal reports

Forms, documents and reports
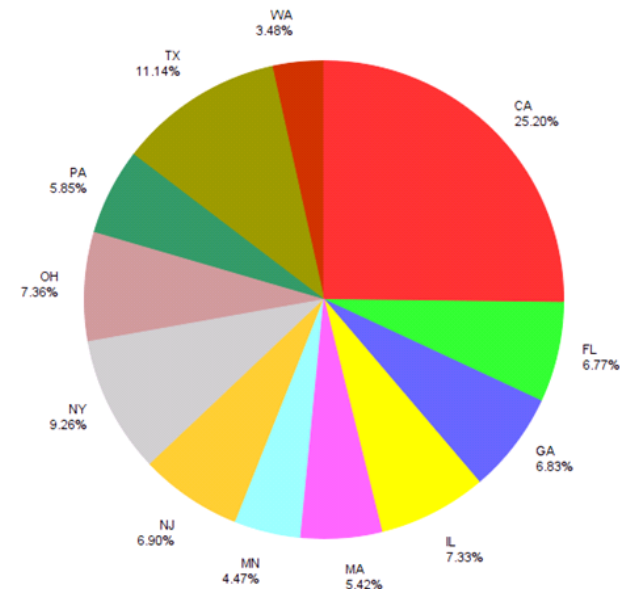
Email
FTP
Fax   **Twitter**

Pop-Up
Smart Phone
Web

Reports, Forms, & Charts

"Deliver the needles; not the haystacks."

- ✓ Exception reports

- ✓ Daily, weekly, & monthly reports

- ✓ Deliver invoices & statements

- ✓ Low-stock triggered POs

- ✓ Bar-charts showing product leaders

- ✓ Pie-charts showing past due totals

- ✓ Line-charts comparing sales performance

- ✓ Reports-on-demand for mobile staff

sage

Data-Mining

Response

Database Monitoring

Cross-App Monitoring

Monitoring

Delivery Monitoring (AWS Monitoring Itself)

Operating System Monitoring

Sage Alerts & Workflow

Triggered Alerts

Triggered Updates

Email Web FTP

Email FTP Fax

Pop-Up Smart Phone Twitter Web

API Toolset
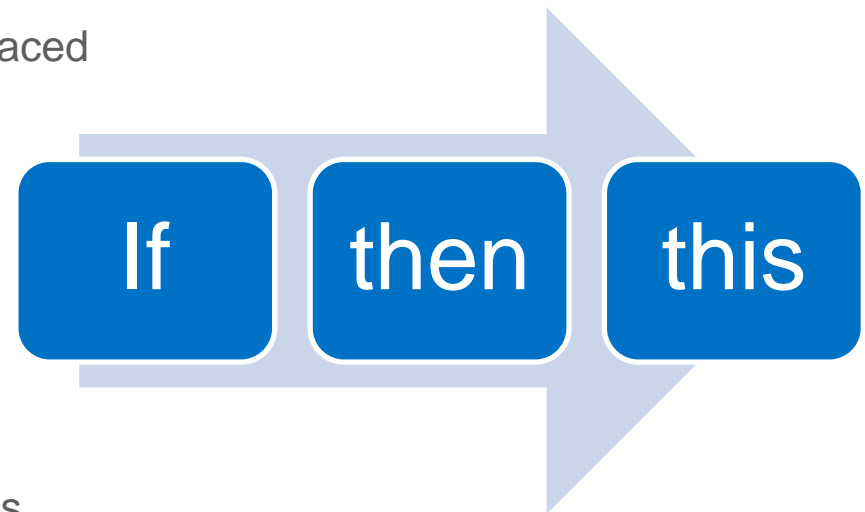
Workflow

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

If **then** **this**

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; unlimited conditions
	Alert:	unlimited people
+	Deliver:	via all methods

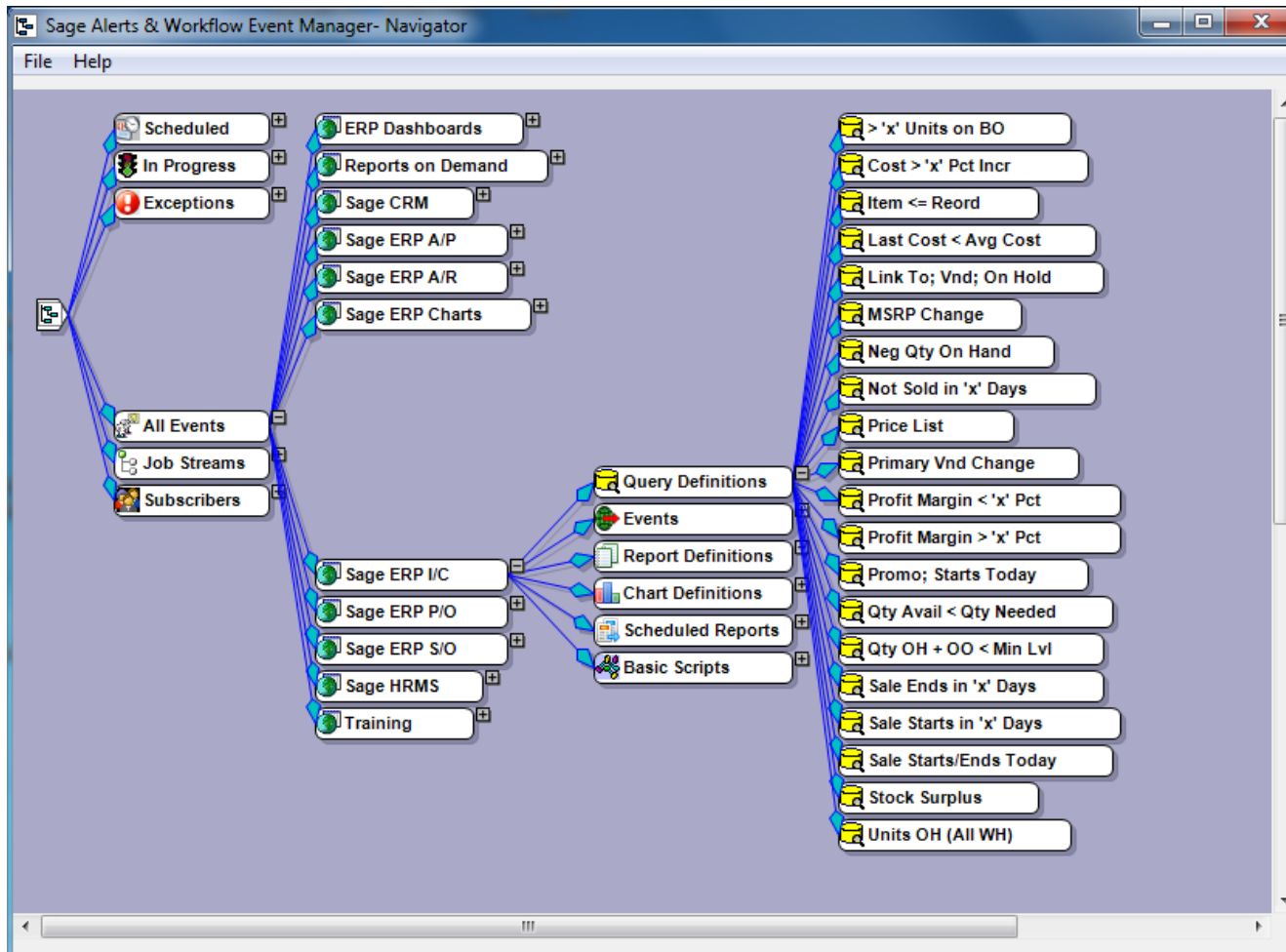**Price:**   **$1,799**   (no per-user fees)

Options:

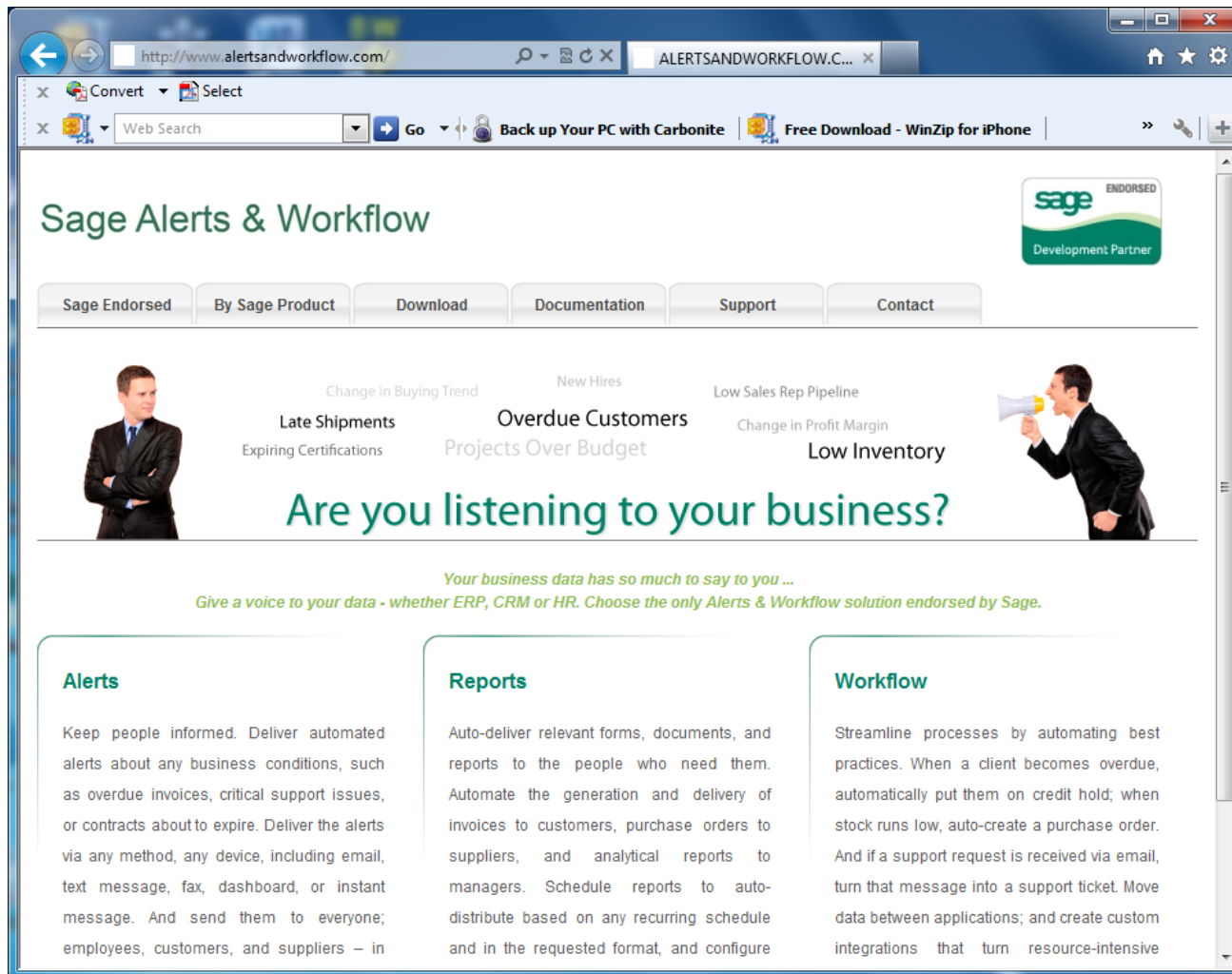Add "Reports" Module: $999   (one-time cost)

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

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

Let's Have a Look . . .

For More Details . . .

Additional Information . . .

-- **Free download of Sage Alerts & Workflow; 30 day trial software**
    -- Free access to Vineyardsoft tech support
    -- Free access to documentation & video training library

-- **Technical Support: Sage Alerts & Workflow clients may call Sage or Vineyardsoft (support provided by Vineyardsoft) and are covered by annual M&S**

-- **Ordering coordinated thru Sage (single point of contact)**

-- **Professional services for implementation, customization, etc. for you provided by your authorized & certified Sage Business Partner.**

Sage Alerts & Workflow Webinar Promotion!!

One-time Webinar promotion* (attendees only) for Net@Work Service Offering:

❖ Download and **Remote** Installation of 30-day trial of Sage Alerts & Workflow ("SAW").

❖ Configuration & testing of up to three (3) SAW "events," from Net@Work provided events list.

❖ Configuration of one (1) Internet-based email account for the sending of email alerts.

❖ Connection of one (1) Sage100 application to SAW via ODBC.

❖ Configuration of up to three (3) alert recipients ("subscribers").

❖ 30-45 minutes of overview training.

❖ *Webinar Promotion: $895 available until <u>March 14</u>th on a first come, first served basis.*

* subject to terms and conditions of agreement

Any Questions?

Thank You For Attending!

For additional information, please contact your Net@Work Account Manager or:

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Save the Date!
Our next three live webinars will take place in March

Sage 100 Financial Reporting - The FRx Replacement Options
Sage Intelligence | Biznet | Renovo

Microsoft officially retired FRx and Net@Work will demo its
three recommended FRx replacement options for
Sage 100 ERP (formerly MAS 90/200).

Watch your emails for more details soon!