Sage Alerts & Workflow

Data-driven insights for business-critical decisions

PRODUCT SUMMARY

Sage

Sage
Alerts and Workflow

Sage Alerts & Workflow provides organizations with a simple way to monitor business applications and data in real-time. Automate alerts, report distribution and workflows,streamline manual processes to avoid stock issues and manage accounts receivable and payable to improve cash flow.

It observes business systems for critical, time-sensitive conditions such as overdue invoices or unfulfilled orders and informs the relevant people to take action. In addition, it automates manual processes to streamline the business and free time for value-adding activities. Expert technical support provided by an online knowledge base or via phone and web, affordable, ready to use within a day, and compatible with all standard email engines. Sage Alerts & Workflow seamlessly integrates with both Sage 100 ERP and Sage 300 ERP.

Benefits
• An invisible assistant and smoke detector for businesses
• Rapid implementation
• Requires no technical knowledge
• Customizable to business requirements

Sage

What is Sage Alerts & Workflow?

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 follow-up 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 pre-configured 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.

Critical insight
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 setup
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-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

Sage

Target Organizations

Size: Small to medium businesses (typically 20 to 200 employees) with an annual revenue between $1M and $49M

Vertical: Distribution vertical including both Wholesale and Discrete Manufacturing. Sage Production Management is created specifically for production and warehouse personnel, meaning that employees have access to a user-friendly front end, accessible via Windows desktop or mobile devices (iOS or Android)

Ideal Customer: Companies looking for inventory management software who need some additional functionality or are looking for a particular functionality that integrates seamlessly with their current Sage solution

Talking Points

Sage Alerts & Workflow customers report:

- Significantly less time spent on planning, forecasting, ordering and reporting
- Increased visibility across the business
- Early warning of critical items needing attention
- Significant reduction in monthly work hours required
- Improved Accounts Receivable collection resulting in additional revenue each month

With an initial investment of less than $2,000 and annual licensing, the application delivers ROI quickly, by:

- Reinvigorating inactive clients
- Preventing stock surpluses/shortages
- Tracking Accounts Receivable collection to improve cash flow
- Managing lead flow to increase customer base

Sage

Buyer Profiles

C-Suite:

C-Level staff will be concerned with the impact this app could have on the future of their business and will want to be able to demonstrate a return on their investment.

Sage Alerts & Workflow will help C-Level execs:

- Increase sales
- Reduce operating costs
- Improve visibility into what is (or isn't) happening across the organization
- Deliver a competitive edge

IT Managers and Staff:

The IT department is looking for a solution to reduce the burden of tasks placed on them by other departments and staff. They require a solution that requires little maintenance and that integrates seamlessly with existing software and processes.

Sage Alerts & Workflow is:

- Easy to implement – downloads in less than 5 minutes and installs in less than 10
- Compatible with all standard email engines
- Wizard-driven – requires no technical knowledge or specific training to use
- Fully supported by an expert technical team

Departmental Managers and Staff:

Managers are looking for ways to streamline their department, reduce margin for error and improve the productivity of their staff, whilst staff members are looking to address specific business pains with solutions that make their jobs easier and themselves more productive.

Sage Alerts & Workflow will help departmental managers and staff:

- Ensure payments are made and received on time, alerts of bad debtors and overdue invoices to take appropriate action
- Monitor inventory activity - including stock levels, sales, storage and delivery
- Provide sales reps with all the information they need to close the deal
- Track and address inactivity - deliver business insight to ensure you are proactive
- Automatically spot and respond to errors and exceptions
- Automate many manual processes, increasing efficiency, reducing errors and freeing up valuable time and resource

Sage

Key Discovery Questions

Does your organization have time-sensitive stock that will be written off if not sold promptly?

Would it help if you were alerted about such stock, and could then offer customers a discount if they purchased within a certain timeframe?

If you could automatically remind customers of upcoming payments due and include outstanding invoices, would that improve your cash flow?

How much time every week do your staff spend generating and delivering invoices and statements to your clients?

How much are you writing off every quarter/year? What is your average amount due over 90/120 days past due?

How much time does your staff spend every week running analytical reports, such as Accounts Receivable, aging reports and stock status reports?

How much money would your organization save every month if your staff was auto-reminded about every early payment discount?

Does your organization have multi-step business processes that often get delayed while waiting for sign off?

How much better would you control and anticipate expenses if budget variations were continuously tracked and triggered alerts whenever a job was projected to go over budget?

How would it impact your financial results if you had a way to automatically monitor for – and send alerts about – potentially illegal activities?

How much time and money would it save your organization if automated review and approval alerts were instantly delivered to the people involved?

Objection Handling

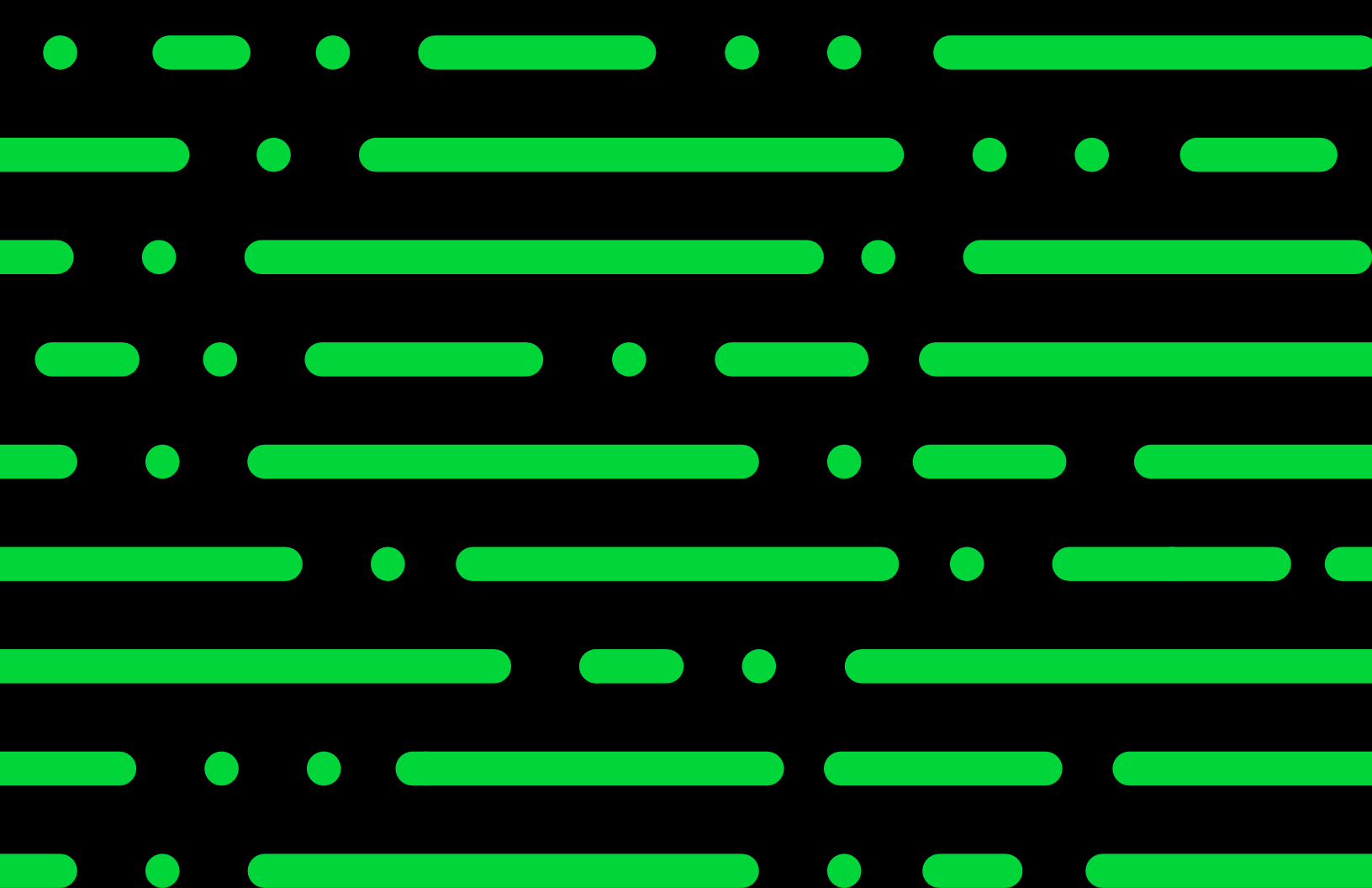**"We don't need this right now or we don't have budget for this right now"**

Answer : Do you know what NOT having an alerts and workflow solution might be costing you? Well it's likely to be significant. Unpaid invoiced quotes due to expire, employees taking excess vacation, stock shortages (or surpluses) all have a cost associated and may be going unnoticed or are not being dealt with in a timely manner. Sage Alerts & Workflow is your invisible assistant, automatically identifying and responding to business-critical solutions that are vital to the success of your business. With a typical installation costing less that $2,000, the question should really be – can you afford not to?

"My current system already gives me alerts..."

Answer : Your existing solution may well already provide you with simple notifications such as stock reminders, overdue invoice notifications or reminders about contract validity. Sage Alerts & Workflow takes alerts to a new level by uniquely combining BI-strength data analysis with alerts, automatic document and report distribution and workflow

"We haven't got the time for installation and training on a new system"

Answer : Sage Alerts & Workflow downloads in less than 5 minutes and installs in less than 10. As it's wizard-driven, it requires no technical knowledge or training to use and can be delivering value in less than a day.

Sage

sage.com

Sage