## Alerts & Workflow

*How your Sage ERP system can benefit from alerts and workflow.*

Sage Alerts & Workflow monitors your business applications in real time and performs alerts, report distribution, and workflow based on your specific business conditions —all automatically, so you can focus on keeping your organization on track for success. With Sage Alerts & Workflow you can:

### Pay & Get Paid On Time

Never write-off bad debt or miss early pay discounts again! Sage Alerts & Workflow tracks your A/R and A/P data electronically, and automatically:

- Takes the right actions at the right times
- Emails overdue client invoices
- Texts you about expiring discounts
- Puts delinquent clients on credit hold

### Monitor Inventory Activity

Keep on top of what's happening in inventory across the board. Alerts & Workflow automatically tracks everything in the lifetime of an inventory item, including:

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

### Help Your Reps Sell More

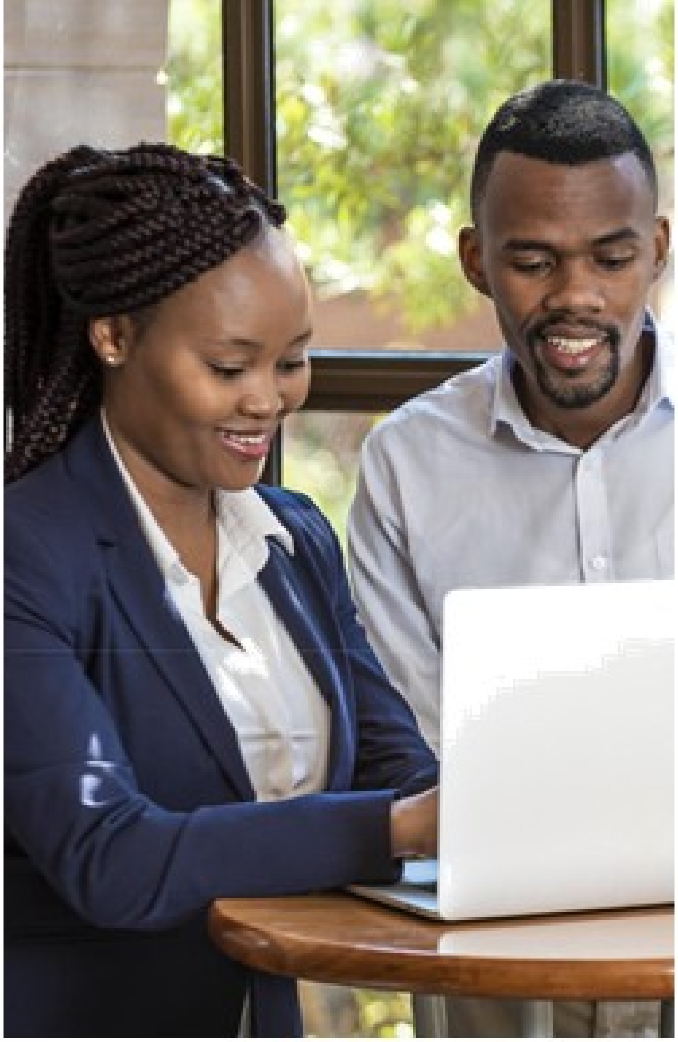
Provide sales reps with all the information they need to close the deal. Alerts & Workflow keeps sales reps on top of their sales by automatically:

- Notifying clients of shipment delays
- Delivering quotes to prospects before they expire
- Monitoring for changes in buying habits and alerting reps to schedule client follow-ups

### Track & Address Inactivity

Gain valuable insights into your business by keeping tabs on things that didn't happen. Alerts & Workflows helps you stay proactive by monitoring inactivity conditions like:

- Inactive customers
- Inactive projects
- Inactive stock items



### Manage Errors & Exceptions

Automatically spot and respond to errors and exceptions. Identify your specific conditions and responses, and Alerts & Workflow will alert you of events such as:

- Duplicate item numbers
- Missing email addresses
- Exceptionally high discounts
- Unacceptably low profit margins

### Stay Connected 24/7 with One-Connection Alerts

Monitor all modules and data for unlimited companies, with unlimited business conditions, and unlimited triggered alerts to an unlimited number of recipients.

- Includes 55 pre-configured business conditions for Sage 300 and 85 pre-configured business conditions for Sage 100

# Additional Optional 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 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