

Alerts

Reports

Workflow

**Sage  
Alerts & Workflow:**

*“Are you listening to  
your business?”*



Communicate More Efficiently

Keep Everyone in the Loop

See Problems Before They Happen



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# Welcome!

Don Farber  
Vice President  
Vineyardsoft Corporation



# Background

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Introduced in 1999; OEM'd by 25+ Developers (e.g., Sage Software)

- A Business Activity Monitoring (BAM) solution
- "A smoke detector for business data"
- Over 11,000 clients worldwide

## Its History:

- TMCLabs "Editor's Choice"
- Sage OEM of the Year (3 years running)
- Partner's Choice Award
- VARBusiness Five-Star Award
- Forbes' "Top Productivity Enhancing Tool"



# Ask Yourself . . .

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

*“. . . if only we had known . . . ?”*

# If Only We Had Known . . .

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“. . . 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.”

# When You're Data-Driven . . .

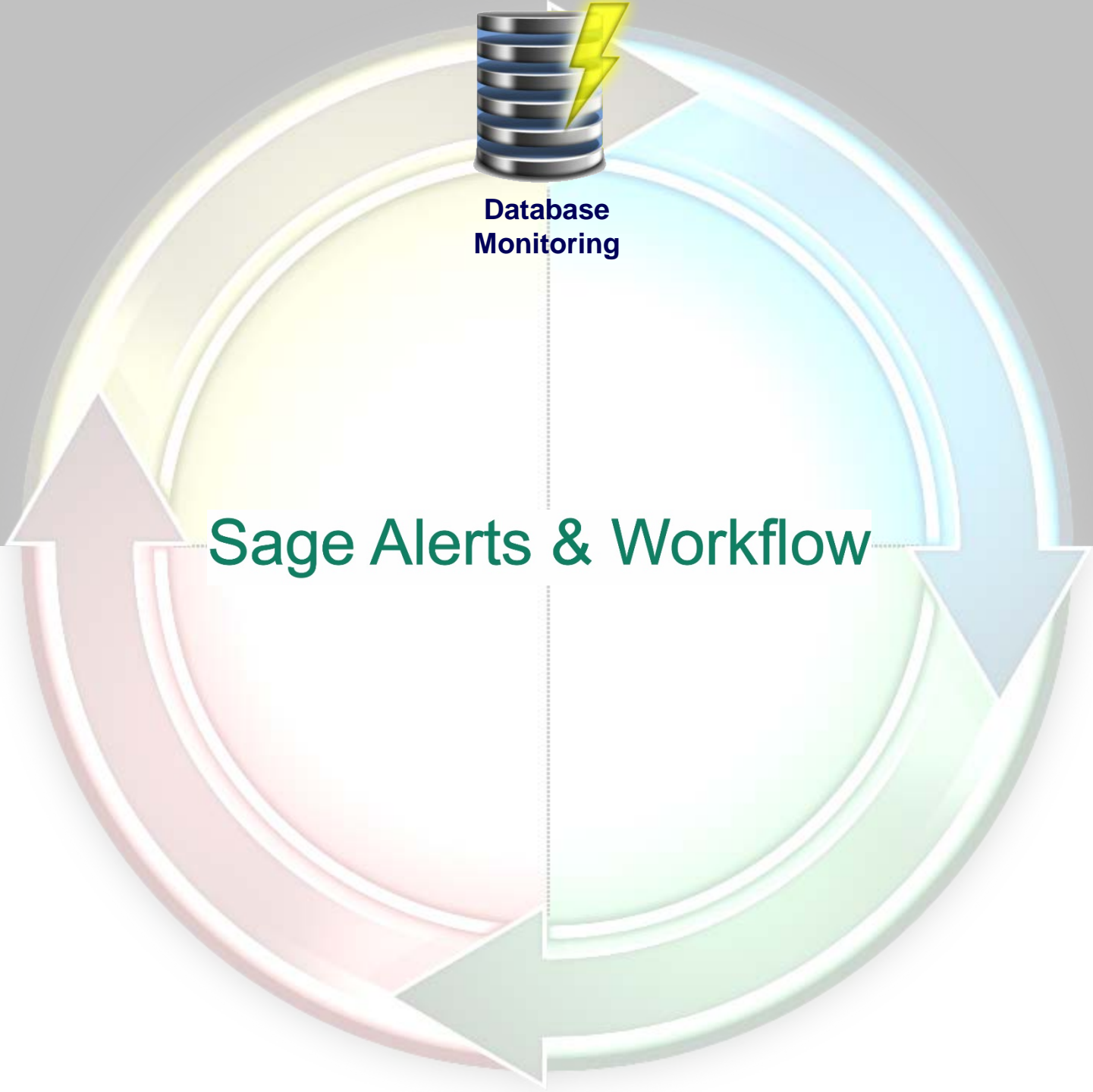
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- “. . . If a customer is overdue . . . *re-send them their invoices.*”
- “. . . If a client has decreased their purchases . . . *notify their salesrep.*”
- “. . . If there are excessive discounts . . . *put the order on hold.*”
- “. . . If a lease is about to expire . . . *notify the vendor.*”
- “. . . If a PO is un-approved . . . *alert our CTO.*”
- “. . . If a supplier has raised their prices . . . *send a chart of the increases.*”
- “. . . If a shipment could fulfill backorders . . . *deliver a report of those orders.*”
- “. . . If a potential sale is for an overdue client . . . *notify the salesrep.*”
- “. . . If we have a new price list . . . *distribute it to all staff.*”



Database  
Monitoring

Sage Alerts & Workflow



# ERP Business Conditions

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- ✓ 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



# Other Business Conditions

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## Sales activities . . .

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

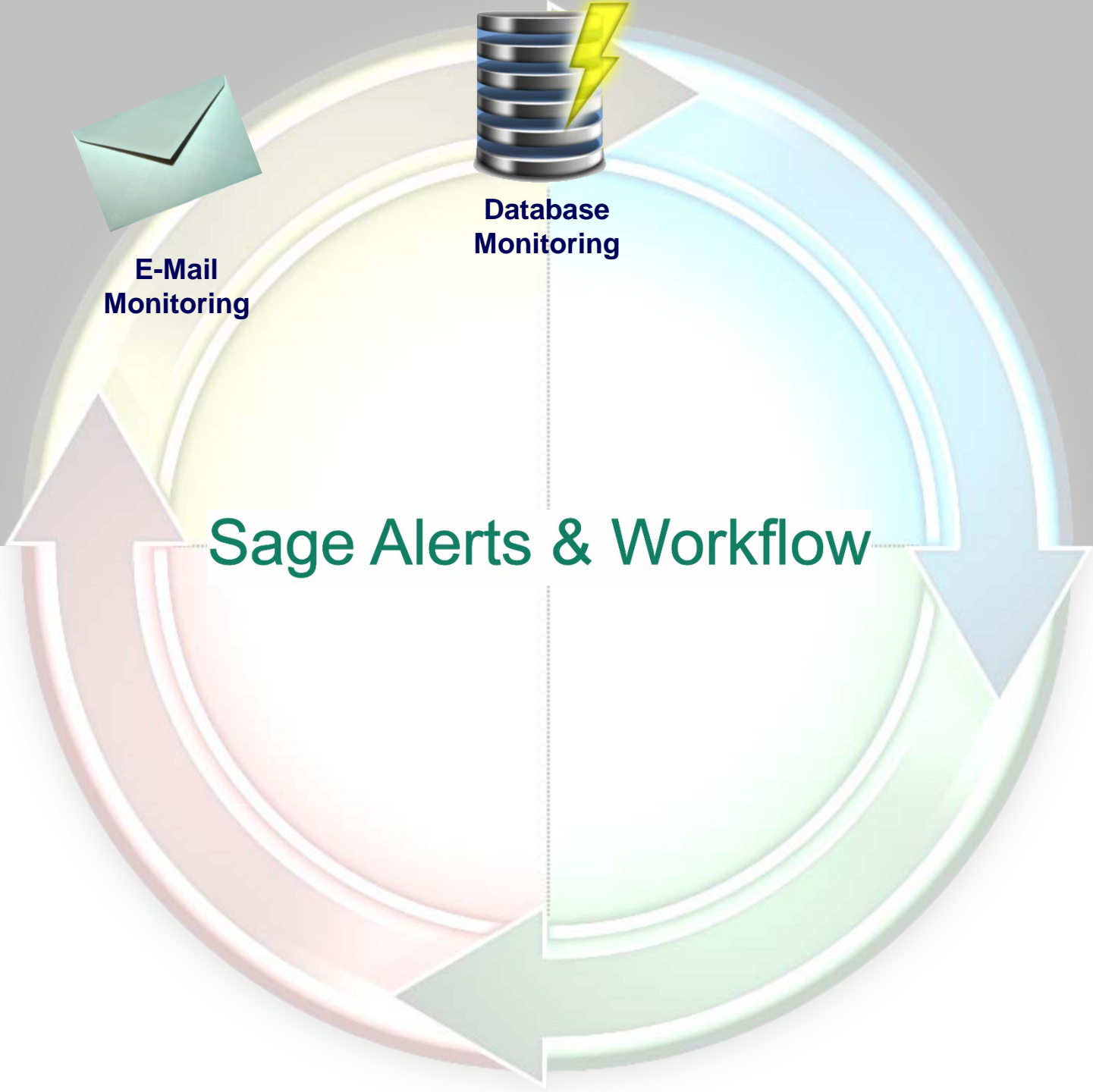
## Customer Service . . .

- ✓ 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





Database Monitoring

E-Mail Monitoring

Sage Alerts & Workflow

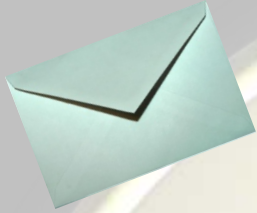
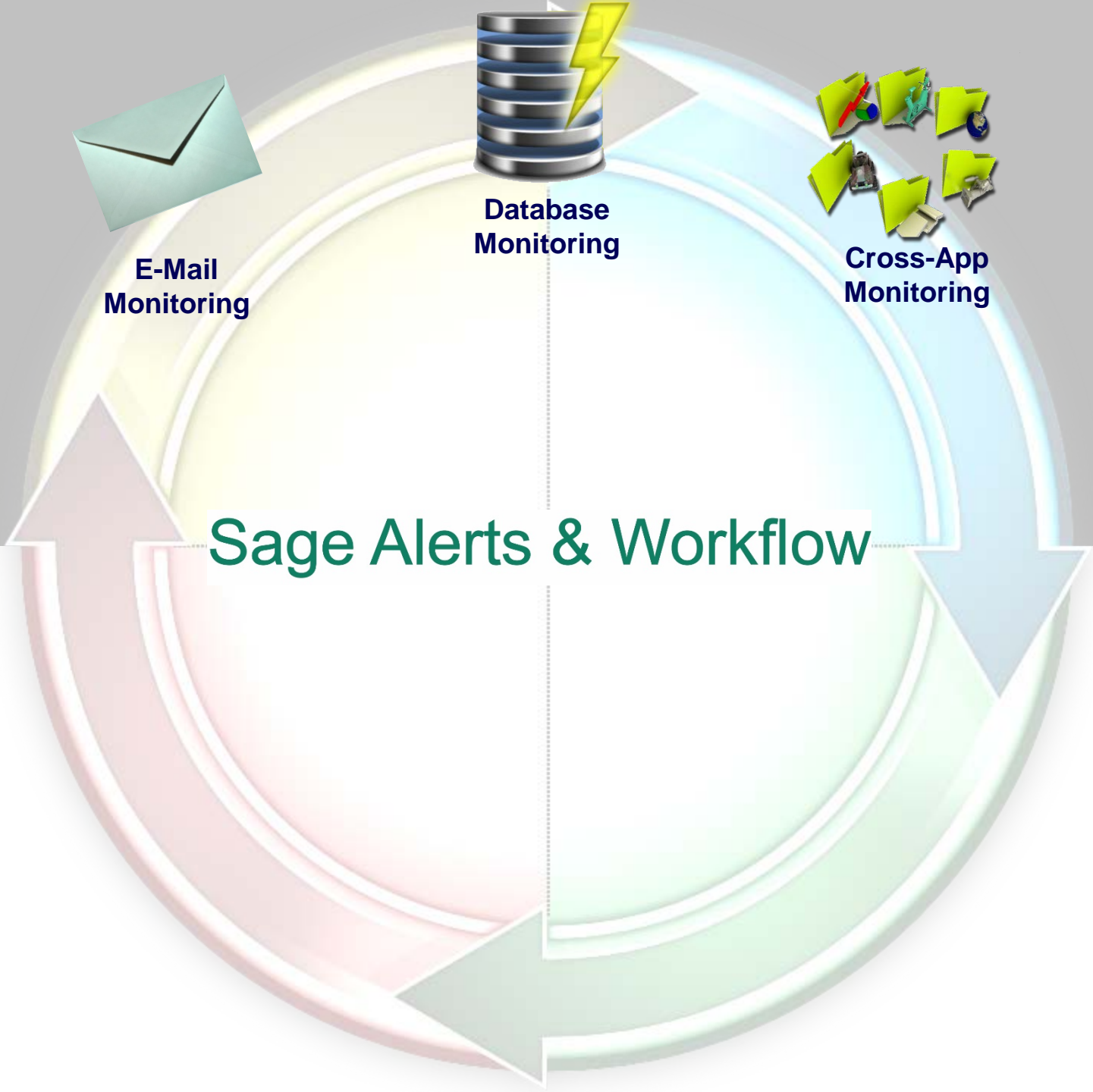
# Email Monitoring

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**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





**E-Mail  
Monitoring**



**Database  
Monitoring**



**Cross-App  
Monitoring**

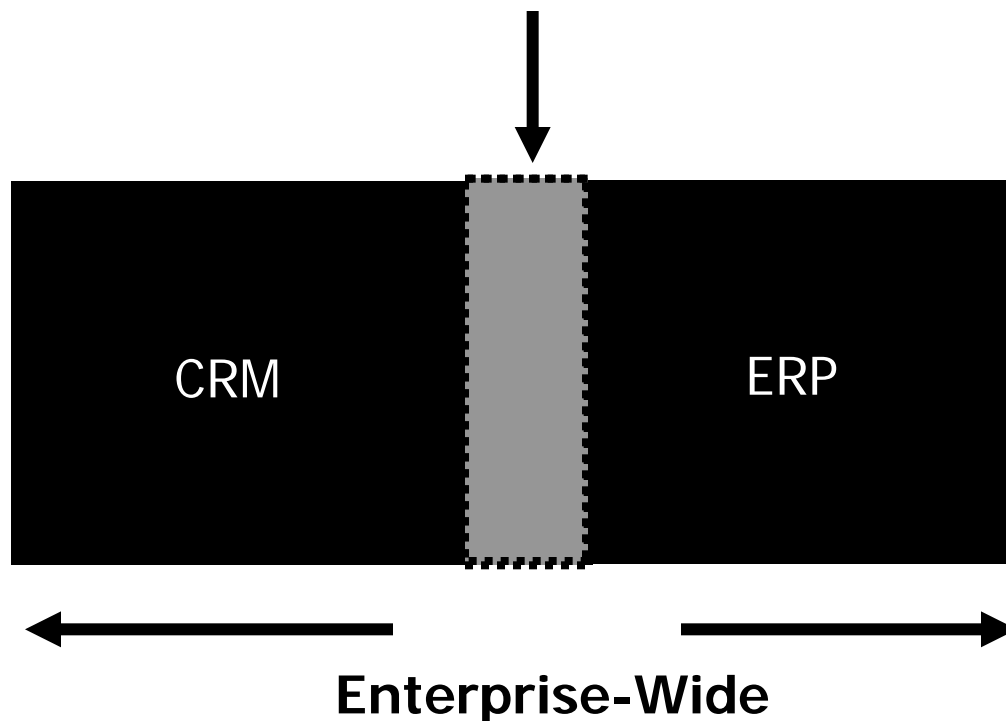
**Sage Alerts & Workflow**

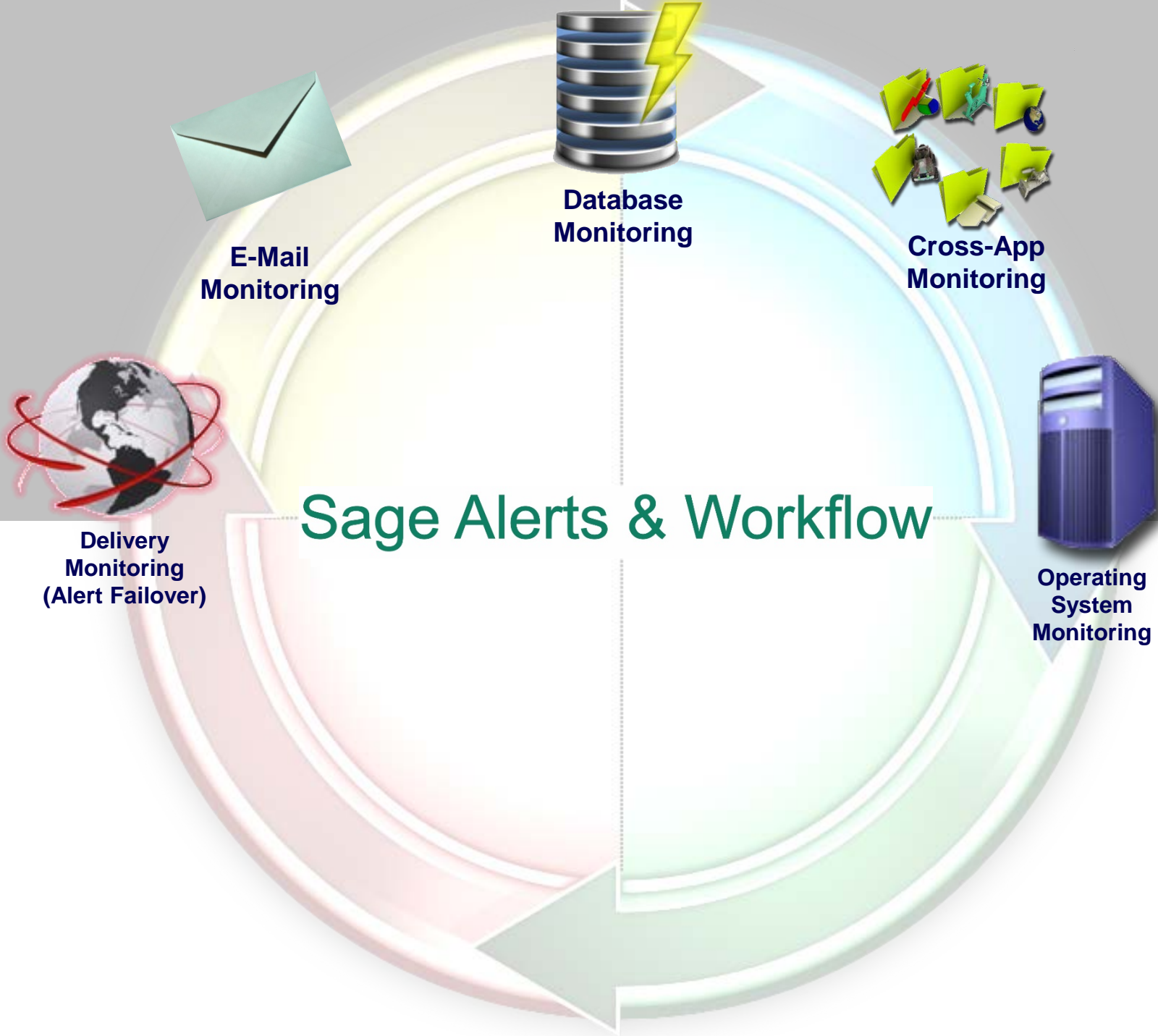
**Data-Mining**

# Cross-Application Monitoring

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Alerts & Workflow can combine 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.





**E-Mail  
Monitoring**

**Database  
Monitoring**

**Cross-App  
Monitoring**

**Operating  
System  
Monitoring**

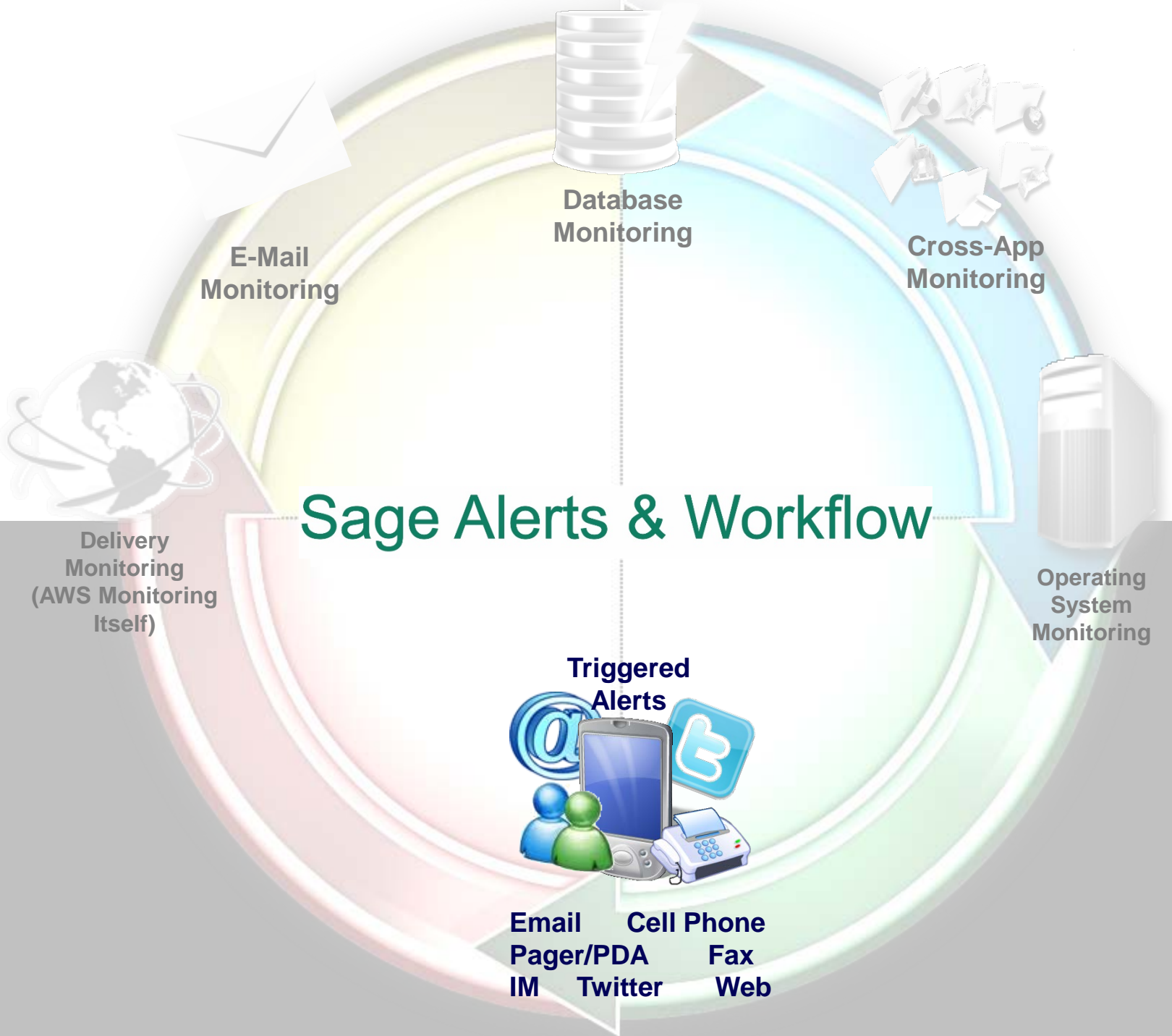
**Delivery  
Monitoring  
(Alert Failover)**

**Sage Alerts & Workflow**



Data-Mining

Response





# Alert Delivery Methods

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**dashboard**



**email**



**fax**



**instant message**

*The right information,  
to the right people,  
at the right time,  
via the right method*



**Chart**



**text message**



**ftp**

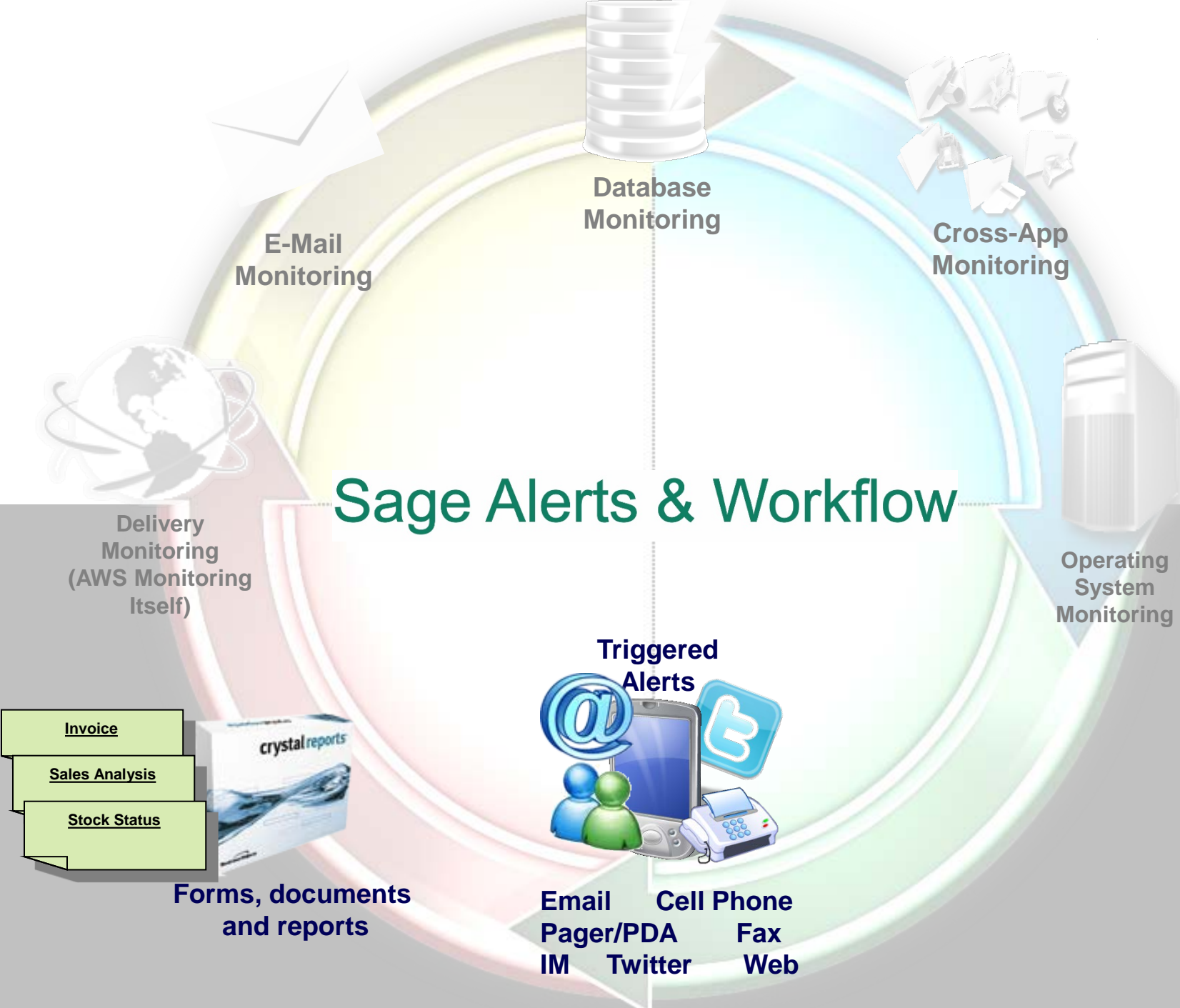


**Twitter**

Data-Mining

Response

# Sage Alerts & Workflow



Database Monitoring

Cross-App Monitoring

Operating System Monitoring

E-Mail Monitoring

Triggered Alerts



Email Cell Phone  
Pager/PDA Fax  
IM Twitter Web

Delivery Monitoring  
(AWS Monitoring Itself)

Invoice  
Sales Analysis  
Stock Status

Forms, documents and reports



# Reports Module



**“Deliver the needles; not the haystacks.”**

- ✓ Exception reports
- ✓ Data-triggered reports
- ✓ Daily, weekly, & monthly reports
- ✓ Delivering invoices for new orders
- ✓ Monthly customer statements
- ✓ Low-stock triggered purchase orders
- ✓ Reports-on-demand for mobile staff

Bar-charts showing product leaders

Pie-charts showing past due totals

## Consolidated Summary Statement of Op

For Period Ending December 31, 2005

### CTI Property Management Co.

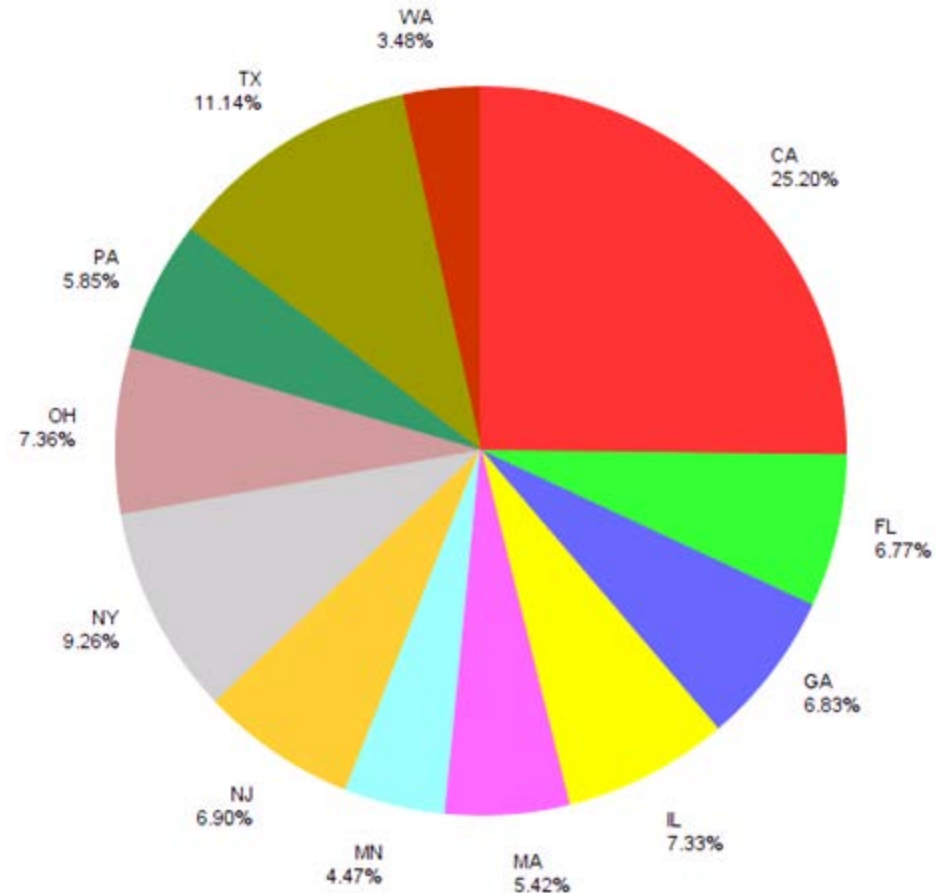
Geographic Region: Northeast Region

	Current	Pr
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Asset Manager: Melanie Davis

Rent	8,881,738	
CAM Reimbursable	826,032	
Real Estate Tax Reimbursable	232,384	
Insurance Reimbursable	32,759	
<b>Rental Income</b>	<b>\$9,972,913</b>	
Other Income	-556,327	
<b>Total Operating Revenues</b>	<b>\$9,416,586</b>	<b>\$1</b>

Common Area Maintenance	897,974	
Real Estate Taxes	246,467	
Insurance	35,425	



Data-Mining

Response

# Sage Alerts & Workflow

Database Monitoring

Cross-App Monitoring

E-Mail Monitoring

Operating System Monitoring

Delivery Monitoring  
(AWS Monitoring  
Itself)

Triggered Alerts

Triggered Updates

Email Web FTP

Email Cell Phone  
Pager/PDA Fax  
IM Twitter Web

API Toolset

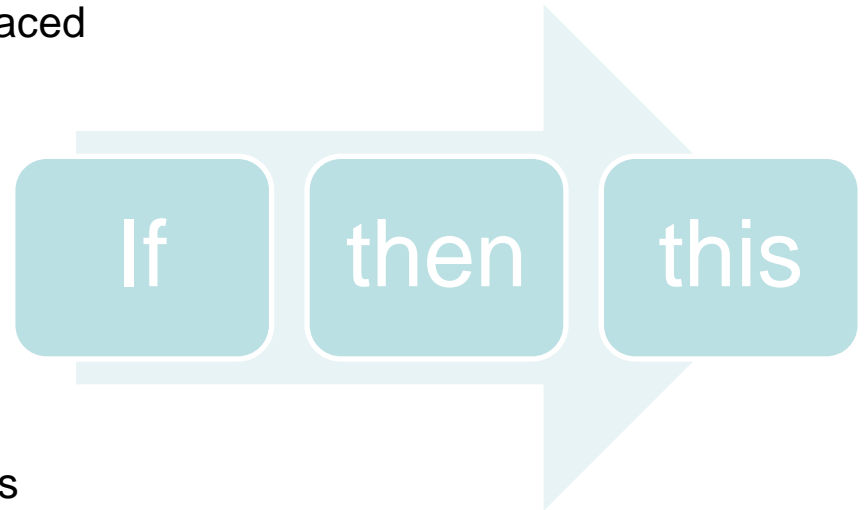


# Workflow

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**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



# Licensing & Pricing

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Monitor: one application for unlimited conditions

Alert: as many people

+ Deliver: via [method]

Price: (no per user)

**ROI Within  
88 Days**

## Options:

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

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

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

# For More Details . . .

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(U.S.) 508-696-6495, [www.alertsandworkflow](http://www.alertsandworkflow.com) [www.vineyardsoft.com](http://www.vineyardsoft.com)

- Free download of Alerts & Workflow; 30 day trial software
  - Free access to tech support
  - Free access to documentation & video training library
- Technical Support: All customers are covered by annual M&S
- Ordering coordinated thru your Business Partner (single point of contact)
- Professional services for implementation, customization, etc. for you provided by your authorized & certified Sage Partner.