

## Sage HRMS Alerts and Workflow by Vineyardsoft

### **A Smoke Detector for Your Business**

Every organization has critical information and transactions that need monitoring. A prospect who has not been followed up with, a contract that is about to expire, a pricing error. Sage HRMS Alerts and Workflow by Vineyardsoft, a Sage Endorsed Solution, monitors all your business data—both within Sage HRMS and beyond. Providing every organization with much-needed exception management, Sage HRMS Alerts and Workflow identifies and responds to conditions that fall outside of an organization's standard operating procedures and enables organizations to avoid saying, "If only we had known."

### **Automatic Form, Document, and Report Delivery**

Most organizations today spend far too much time manually running, distributing, and delivering various forms, documents, and reports to both their internal employees and external clients and partners. Sage HRMS Alerts and Workflow automates both the production and delivery of such documents, whether you are sending quotes, invoices, or letters to clients, or distributing analytical reports to an organization's own managers and executives. Using the industry-standard SAP Crystal Reports® for Sage HRMS, Sage HRMS Alerts and Workflow generates forms and documents when needed—or when business conditions demand it—and delivers this information to the right people at the right time.

### **Intelligent Workflow and Business Process Automation**

Sage HRMS Alerts and Workflow does more than just send alerts; it triggers "workflow" to update your applications, schedule intelligent tasks, and transmits relevant information to your organization's disparate software systems. Whether it's to update a client's history based on the receipt of a customer email message or to schedule a phone call for a prospect who has not been contacted within the last week, Sage HRMS Alerts and Workflow gives organizations the means to automate and monitor critical business processes.

### **BENEFITS**

Notify staff about critical business issues as they occur, rather than hours, days, or weeks later.

Identify trends or problems across your entire business by combining and analyzing information from multiple systems.

Synchronize data among multiple business applications and identify inconsistencies between databases.

Push client or partner-specific information out to a web browser for easy, self-service access.

Know when someone changes a critical piece of business information, such as a contract renewal cost or a client's credit limit.

Be alerted—and trigger automatic corrections—when potential problems appear in your Windows® operating systems.

Monitor activity on your website, and autoprocess information requests and questions from prospects or clients.

Combine all your applications—including homegrown solutions—under one Business Activity Monitoring solution, and create a central point for business process management.

Enable "follow-me alerts" that designate when and where to find you based on the time of day and day of the week.

Get an immediate ROI due to free, preconfigured collections of alerts for use with all Sage business applications.

## FEATURES

<b>Enterprise-Class Architecture</b>	Sage HRMS Alerts and Workflow uses the industry-standard Microsoft® SQL Server® database for unequaled data processing speed, flexibility, and scalability. SQL Server Express or Microsoft Access® are also available as database options.
<b>Integration With Industry Standards</b>	Supports Microsoft Exchange (Outlook®) email, Internet (SMTP), and Lotus Notes Mail for both alerts and monitoring incoming email messages. Includes integration with Microsoft Fax and browser-based alerts through Microsoft Internet Explorer®
<b>Wizard-Driven Event Designer</b>	No programming or SQL expertise needed. Wizard-driven process walks you through event design steps, including trigger definition and message design. Automatic HTML message design output available without HTML coding.
<b>Complete Event Audit Trail</b>	Online history of triggered events, delivered alerts, and executed workflow. Includes whether alert was successfully delivered, time of delivery, and names of attached reports and forms. Also includes utilization reporting for event optimization.
<b>Alerting by Email, Fax, Pager, Screen Pop, and Web Browser</b>	Alert recipients can receive information through any combination of email, fax, pager (including SMS paging), screen pop, FTP (for document and report delivery), and web browser. No additional hardware or software is required.
<b>Form and Document Delivery in All Standard Formats</b>	Includes order confirmations, invoices, statements, dunning notices, newsletters and picking lists in HTML, PDF, Word, Excel, or other formats. Delivery may be scheduled or it may be based on business transactions or application activity.
<b>Dynamic Date Calculations</b>	Allows monitoring of activity taking place “today,” “tomorrow,” “yesterday,” “last week,” “next week,” “current month,” and so on. Special “last check” processing optimizes system resources by dynamically identifying new and/or changed data.
<b>Flexible Message Formatting</b>	Includes “header” and “detail” sections, customizable grouping, executive summary, task-level listings, and record-level alerts to clients. Supports currency and numeric formatting as well as controls for columnar display and unlimited free-format text.
<b>Intelligent Alert Recipients</b>	Includes client’s sales rep, manager, and other responsible parties. Supports workdays/hours, and home vs. work delivery addresses. Alert recipient data from all Sage applications is automatically linked to Sage HRMS Alerts and Workflow with no reentry of data.
<b>Limitless Scheduling Options</b>	Includes every “x” hours/minutes, daily at specific times, named day (for example, every Monday at 9 a.m.), and numbered day (for example, first Monday, third Thursday). Incoming mail monitored every “x” minutes. Holidays and event dependencies supported.
<b>Scheduled and Triggered Report Distribution</b>	Generate and distribute an unlimited number of SAP Crystal Reports (forecast reports, activity reports, and so on) to unlimited recipients. Report delivery can be scheduled or real-time trigger-based and can be delivered by mail, fax, FTP, or web browser.
<b>Email Response System</b>	Monitor incoming email and website requests. Match email/web info with contact records in Sage applications. Update contacts with email details, schedule follow-ups, and create accounts, contacts, leads, and transactions based on content received.
<b>Cross-Application Analysis and Response</b>	Combine data from multiple Sage applications, analyze it jointly, and trigger integrated alerts. Use combined results to move data from one application to another or verify consistency of records across multiple Sage databases.

For more information about Sage HRMS Alerts and Workflow, please contact your local Sage Business Partner, call us toll-free directly at **800-424-9392**, or visit our website at **[www.SageHRMS.com](http://www.SageHRMS.com)**