



**Technology Advisory Group, LLC**  
ACCOUNTING SOLUTIONS AND CONSULTANTS

# ★ info

Newsletter for Sage MAS 90 and Sage MAS 200 ERP

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## Headline News

Sage Software offers free Web seminars designed to help you better manage your business. Current offerings include:

- Sage MAS 90 and MAS 200 Job Costing—Control job costs and increase cash flow
- What's New in Sage MAS 90 and 200 Version 4.3?
- Maximize Revenue by Improving Your Billing Process in Sage MAS 90 and 200

For the current Sage MAS 90 and Sage MAS 200 Webcast schedule or to register [click here](#).



## Business Activity Monitoring Tools Put Your Data To Work

**W**e have all had days filled with troubleshooting problems and remedying mistakes or oversights. Often these problems could have been avoided if only we had some foreknowledge—if somehow we had been alerted to the situation. Of course Sage MAS 90 ERP software captures a great deal of important information about your company and provides the reports essential to running your business. But you may not always have time to read through reports to identify issues requiring your attention. That's where business activity monitoring comes in. Powerful business activity monitoring tools are available to review your data and alert the appropriate persons by e-mail when items needing attention are identified. And these tools can even update your data automatically based on criteria you set. Let's learn more.

### Mind Your Business

Imagine if you had an assistant to monitor the situations you deem important, notify the appropriate people of issues for review and action, and help to get at the root of each problem by providing access to the relevant Sage MAS 90 reports and inquiries. Imagine further that this assistant never makes a mistake, and works 24 hours a day, seven days a week! That is the type of assistance you can expect from a business activity monitoring system.

The precise capabilities of business activity monitoring systems vary. At the basic level, they all can monitor your database and



automatically e-mail designated persons when a certain condition occurs. More advanced systems can act on the information and generate new transactions in your database to effectively automate your workflows.

### Resolve To Stay Alert

The basic capability provided by all business activity monitoring systems, commonly called alerts, monitors the activity in your system and automatically notifies you, your staff, your business partners, and even your customers when important events take place. Alerts use your existing e-mail system to notify you of significant events transpiring within your database. Notifications enable you and your staff to avoid missed deadlines, steer clear of problem situations, and to capitalize on opportunities. Here are some examples of the

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## Business Activity Monitoring Tools

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types of issues alerts can handle:

- Alert the purchasing manager when an item is below its minimum stock level at a warehouse. Never run out of that best seller again!
- Send an e-mail to the account manager when one of their customers has an invoice past due by 30 days.
- Notify your purchasing agent when the cost of items received exceeds the Standard Cost.
- Communicate to the sales staff when an inventory item price changes.
- E-mail a customer when their credit status changes.
- Notify the sales manager when an order does not ship by the due date.
- Help prevent fraud or catch data entry errors with an alert when an Accounts Payable check over a certain amount is created.

Alerts can even act as a complete receivables collections tool by sending your customers an e-mail when invoices become past due and simultaneously adding them to a list for internal follow up.

### Scheduled Or On Demand

You will want to schedule most tasks to run automatically at specified intervals, such as daily or weekly, so that the system can notify you automatically when the selected conditions are met. However, you also may run alerts on demand to run a quick check or to update the list of items meeting the criteria.

### Workflow Automation

More powerful business activity monitoring systems can take action based on events that occur. For example, you can generate a work order when an order is received, and then when the work order is completed, generate an invoice and e-mail it to the customer. You can set workflow to route purchase orders

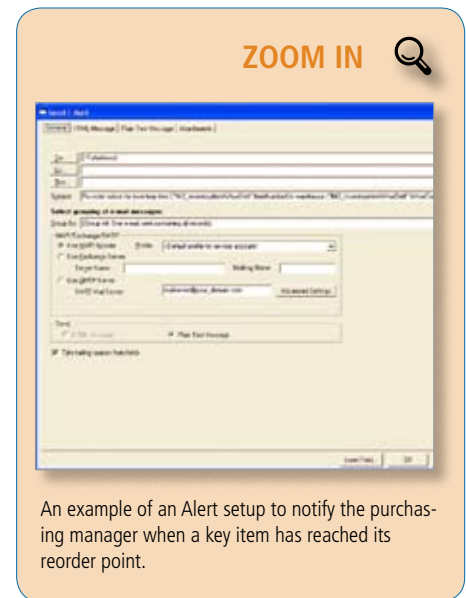
for approval, and when integrated with your CRM solution, schedule follow-up calls with customers and leads. More advanced systems can even monitor and auto-respond to the content of incoming e-mail messages and Web form submissions. In addition to sending e-mail alerts, some systems can send alerts via fax, pager, cell phone, screen pop up, or Web browser, so you can be sure to reach the required person anywhere at any time.

### Choosing A Solution

Two of the business activity monitoring systems available for Sage MAS 90 are the Business Alerts Professional module and KnowledgeSync, a powerful Sage Endorsed Solution. Below we have summarized the capabilities of each solution.

#### Business Alerts Professional

- Monitor date and time-sensitive events.
- Receive notifications regarding credit holds, inventory thresholds, sales ratios, urgency levels, and priority client transactions.
- Merge data into e-mail messages.
- Include e-mail attachments to provide additional information.
- Send automated responses to customers and vendors.
- Keep employees informed for better decision making.
- Track important business events.
- Improve customer service for better customer retention.
- Provide response to changing business conditions 24 hours a day, seven days a week.
- Includes a range of pre-built alerts for A/R, A/P, Job Cost, Purchase Order, Sales Order, Inventory, and General Ledger that you can easily customize to your needs.



An example of an Alert setup to notify the purchasing manager when a key item has reached its reorder point.

#### KnowledgeSync

- Enterprise-wide solution featuring scalability, flexibility, and dependability.
- Trigger personalized alerts about any business conditions via e-mail, fax, pager, cell phone, screen pop up, and Web browser.
- Automate the delivery of forms, documents, and reports to clients and staff.
- Execute workflow to deliver invoices and purchase orders, and schedule intelligent follow-ups.
- Monitor and auto-respond to the content of incoming e-mail messages and Web form submissions.
- Dynamically analyze data between multiple business functions (e.g., Accounting and CRM).
- Includes a range of pre-built alerts that you can easily customize to your needs.

Here we have just provided a brief overview, please give us a call to discuss the best business activity monitoring tool for your company. ✨