

Business Activity Monitoring

Proactive Information Delivery Tools Become More Powerful

If you rely on multi-step business processes, whether it is a manufacturing job or the steps required to enter and process an order, you know the value of monitoring those processes. Visibility into what is happening or what is not happening, as well as bottlenecks and backlogs, is key to the efficient usage of an ERP system. That is where a Business Activity Monitoring (BAM) system comes in. Properly configured BAM systems can help you and your staff communicate more efficiently, do less manual work, and most important, avert problem situations.

Mind Your Business

Among all the transactions in your Sage ERP MAS 500 system is information that requires your attention, such as expiring quotes, overdue activities, changes in the pipeline activity, low stock levels, and changes in customer buying patterns. Every minute that this information goes undetected can cost your organization in terms of productivity, revenue, and customer loyalty. Important as this information is, you may not always have time to analyze reports to identify issues requiring attention.

Business Activity Monitoring tools can 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. A good BAM system acts like the perfect personal assistant that monitors the situations you deem important, notifies the appropriate people of issues for review and action, and helps to get at the root of each problem by providing access to the relevant Sage ERP MAS 500 reports and inquiries. And this assistant never makes a

mistake, and works 24 hours a day, seven days a week!

The precise capabilities of business activity monitoring systems vary. At the basic level, they can monitor your database and automatically send an email to a 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.

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Resolve To Stay Alert

Alerts are the basic capability provided by all business activity monitoring systems. The systems monitor the activity in your system and automatically alerts you, your staff, your business partners, and even your customers of significant events transpiring within your database. Here are some examples of some alerts you could use:

- Alert the purchasing manager when an item is below its minimum stock level.
- Send an email to the account manager when one of their customers has an invoice past due by 30 days.
- Notify purchasing when an ordered item is late by a specified number of days.
- Communicate to the sales staff when a key inventory item is out of stock.
- Email a customer when they have exceeded their credit limit by a specified amount or percentage.
- Notify the sales manager when backordered items are received.
- Prevent fraud or catch errors with an alert when an Accounts Payable check over a certain amount is created.

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

Scheduled Or On Demand

You will want to schedule most tasks to run automatically at specified intervals, such as hourly, 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 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 email 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 email messages and Web form submissions. 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 and at any time.

Choosing A Solution

Two of the business activity monitoring systems available for Sage MAS 500 are the Business Alerts module and KnowledgeSync, a powerful Sage Software Endorsed Solution. Below we have summarized the capabilities of each solution.

Business Alerts Module

Business Alerts provides you with basic email alerts right within your Sage ERP MAS 500 system. It can monitor date and time-sensitive events and send notifications for items such as credit holds, inventory thresholds, sales ratios, urgency levels, and priority client transactions. You can merge ERP data into email messages, and include email attachments to provide additional information.

Business Alerts includes a range of pre-built alerts for the accounting, distribution, and manufacturing modules that you can easily customize to fit your needs.

KnowledgeSync

KnowledgeSync is an enterprise-wide solution with scalability, flexibility, and dependability. It can be an essential ingredient to efficient ERP and manufacturing processes. KnowledgeSync can:

- Watch for projects that reach a certain stage and notify the next people responsible for working on them.
- Compare actual versus projected time lines and budgets and send alerts when acceptable variances are surpassed.
- Generate work orders, invoices, picking lists, and other ERP forms and documents based on a project or job reaching a specific status.
- Monitor for delays or bottlenecks in a process, such as too many tasks assigned to one individual.
- Identify when a job or process is complete and move job-specific data over to a financial or sales database and notify the appropriate clients.

KnowledgeSync also performs cross-application analysis, alerts, and response across your ERP, CRM, and HR systems and more. Cross-departmental and enterprise-wide business analysis and response can give your organization the competitive edge you need.

KnowledgeSync can send your personalized alerts via email, fax, pager, cell phone, screen pop up, and Web browser. New in Version 8 is the ability to send alerts via instant message systems such as Windows Messenger and GoogleTalk. You even can send alerts via Twitter. Version 8 also runs as an optimized Windows service, supports Authenticated email, and includes enhanced support for Crystal Reports® as well as a new formula calculation wizard. ✨

Top 20 Reasons To Upgrade

Are you still running on an older version of Sage ERP MAS 500? Studies show many customers choose not to upgrade due to concerns over the cost and effort involved. However, because every release is designed to streamline workflow, save you time and money, and improve customer service, you can experience a fast return on your upgrade investment. In this article, we will cover the top ten features of the latest release, and remind you of ten other great features added in the previous two releases which you will also enjoy using when you upgrade.

Version 7.4—Top Ten Enhancements

Sage ERP MAS 500 Version 7.4 is packed with usability enhancements designed to create smoother, and more flexible workflow. Here we recap the top 10 highlights.

Accounts Receivable

1. The ability to apply overpaid amounts to an existing invoice and track the balance using the original invoice number, through the ability to create invoices with a negative amount.
2. Process Cash Receipts was enhanced to allow the creation of a customer refund from start to finish, including printing the check, all from one task.

Advanced Manufacturing

3. A new check box is added that allows you to complete a Work Order step without issuing material.
4. New Production Return Entry and Progress Return Entry tasks provide a simple way to correct data entry errors that inevitably occur in a busy

manufacturing plant.

5. Bin tracking in Version 7.4 adds the ability to use the backflush material issue method while also tracking bins.
6. The Advanced Manufacturing posting task was redesigned to provide you with a central dashboard allowing you view all your different transaction types on one screen.

Inventory And More

7. Inventory Management receives enhancements with focus on decimal precision, rounding, and related Unit of Measure features.
8. Landed Cost in Purchase Order is enhanced with options to define customized landed cost types, allocation methods, and override capabilities.
9. Business Insights receives performance improvements.
10. Technology updates ensure your system is compatible with the most current hardware and operating system platforms.

Version 7.3—Top Five Enhancements

Here are the top five enhancements introduced in Sage ERP MAS 500 7.3:


1. The Credit Card Processing module is free when you use Sage Payment Solutions as your processor, and the transactions can be initiated from Sales Order, Accounts Receivable, and Cash Management.
2. A streamlined Sales Order processing workflow improves customer service and productivity, and multiple shipments can be included on a single invoice to simplify billing and reduce paperwork.
3. Vendor and customer documents can be sent electronically in PDF format.

4. Make payments electronically using the Automated Clearing House (ACH), and avoid check fraud with Positive Pay.
5. Customer and vendor records can be merged easily to eliminate duplicates or consolidate entities.

Version 7.2—Top Five Enhancements

Here are the top five enhancements introduced in Sage ERP MAS 500 7.2:

1. Business Insights Dashboard was introduced, along with new BIE views, such as the *Where Serial Number Used* preview, and an *Active Memos* preview.
2. Data Import Manager was introduced.
3. The option to Pick by Order or Shipment was added, allowing you to complete urgent orders first.
4. Sage ERP MAS 500 Office became a generic feature, available in all data entry tasks. Ability to access Office Template creation from within Microsoft Word was added.
5. Online tutorials and extended Help options offer comprehensive training and search capabilities.

Are you ready to upgrade? Please call us for assistance. 

IN THE SPOTLIGHT:

Web-based Access To Sage ERP MAS 500 Tasks

Last year Sage retired the Sage ERP MAS 500 eCustomer and eSalesforce modules and began offering the eBusiness Suite powered by RKL eSolutions, a Sage Endorsed Solution, as a replacement. In addition to Business to Business (B2B) and Business to Customer (B2C) ecommerce, RKL eSolutions offers the ability to access many Sage ERP MAS 500 tasks safely and securely from a Web browser.

eCommerce With RKL eSolutions

Like the Sage ERP MAS 500 eCustomer and eSalesforce modules, the eBusiness Suite enables 24/7 e-commerce access for customers, salespeople, and employees. It can serve as a complete B2B and B2C e-commerce system. The eBusiness Suite uses updated technologies such as .aspx Web Pages and Web Services, and also enables credit card processing for Web Orders.

The Basic Edition of the eBusiness Suite was provided at no charge to existing eCustomer and eSalesforce customers during the first half of 2011. With the release of Sage ERP MAS 500 Version 7.4, it replaced the eCustomer and eSalesforce modules. Standard and Advanced Editions are available at an additional cost.

In effect, the eBusiness Suite can function as a web-based interface providing remote access to orders, shipments, invoices, payments, and other important

customer service information. With the ability to enter quotes, orders, and RMAs from any Web browser, eBusiness Suite can be an important tool for sales representatives and executives who are often on the road or simply away from the office.

Web Services Capabilities

Web Services for Sage ERP MAS 500 provides an alternative method of interfacing with the various business rules of Sage ERP MAS 500. This allows you to exchange data with third-party applications, knowing that it will be handled as if it were entered into Sage ERP MAS 500 directly thus ensuring data integrity.

Web Services for Sage ERP MAS 500 powered by RKL is a browser-based application programming interface (API) that extends Sage ERP MAS 500 functionality to the Web, supporting functionality in the following areas:

- Customer Maintenance, Lookup, and Status
 - Recent Shipments and Orders
 - Invoice and Payment History Inquiries
 - Sales Order and Shipment History Inquiries
 - Item and Price Lookup
 - Inventory Stock Status Lookup
 - Item Alias entry and lookup
 - Order Entry
 - Inventory Transfer Order Entry
 - Autoship functionality in Sales Order
- Web Services allows you to easily

integrate third-party applications into Sage ERP MAS 500 in addition to providing Web-based access to these tasks. Written in the Microsoft .NET Framework, Web Services uses the latest Web technology. The current supported platform is:

- Microsoft IIS 6.0 or 7.0 in 32 or 64-bit mode
- Windows Server 2003 or 2008 32 or 64-bit
- .NET framework 3.5 SP1

Please call us with your questions. ✨

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