

The One-Connection “Alerts” edition is the base Sage Alerts & Workflow module; you cannot NOT purchase it. It allows for the monitoring of data and the generation and delivery of alert messages via email, fax, mobile device, FTP, print, web dashboard, and instant message. One “connection” refers to a single application being monitored; regardless of the number of “companies” within an ERP application.

Additional “connections” allow a customer to monitor data outside of the initial application being monitored. For example, a Sage customer may use their first connection to monitor their Sage ERP system, a second connection to monitor their CRM application, and a third connection to monitor their HR application. (Once a client reaches ‘4’ connections, we automatically give them an “Unlimited Connection” license, enabling them to monitor every business application they’ll ever own.)

A connection is needed to use Sage Alerts & Workflow to monitor INCOMING email, if that capability is desired. (Alerts & Workflow always includes the ability to send OUTGOING alert messages via email as well as other delivery methods.)

■ The “Reports” module has 3 benefits:

1. It allows for the integration of Crystal Reports and allows Sage Alerts & Workflow to generate reports either on a scheduled basis (such as a “daily stock status report”) or on a “triggered” basis – such as generating a stock status report only when an item drops below a certain level (such as its stock minimum).
2. This module is used to generate forms and documents in PDF, HTML, and other formats – such as invoices, statements, purchase orders, picking tickets, and the like.
3. This module enables “graphic” alerts – alerts that include bar charts, pie charts, line, charts, comparative performance charts, and the like. The chart design tool is embedded in this module.

■ The “Workflow” module is most frequently used when a client wishes to configure an event that writes data back into an application – such as an event that checks to see if a client has “overdue invoices” and (if so) the event uses an “action” to change the customer’s credit status from “good” to “on hold” in an underlying ERP (accounting) system.

One of the nice things about the Actions module is that once licensed, it can be used to add or update records in an UNLIMITED number of application databases – regardless of the number of databases being monitored by Sage Alerts & Workflow.

The Actions module includes the following capabilities:

- Executing SQL “insert” & “update” statements
- Running stored procedures
- Running VB (Visual Basic) scripts
- Exporting triggered event data to a file (such as a comma separated or tab delimited file)
- Sending alerts via Twitter

Many of these options do require programming knowledge – such as writing VB scripts. It is worth noting that the ability to execute SQL insert and update statements does come with a “design wizard” so you don’t really have to be a SQL expert to use it . . . but it should definitely be used by someone who is responsible and knows what they are doing.