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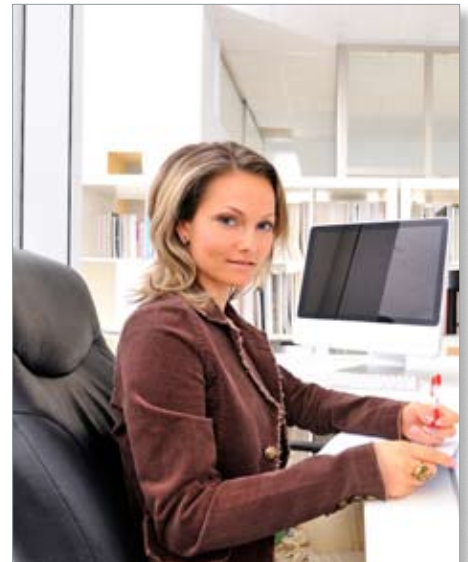
In February, Sage North America announced the launch of Sage PFW ERP 5.7. The 5.7 release features exceptional time and money and time-saving tools, especially for multinational businesses and process manufacturers. "Version 5.7 exemplifies our ongoing commitment to help make business management as simple and cost-effective as possible," says Sam Hunter, senior vice president, Business Management Division.

Stay Alert With Business Activity Monitoring Tools

We have all had days filled with troubleshooting problems and remedying mistakes or oversights. Often these problems could have been avoided if only somehow we had been alerted to the situation. Sage PFW ERP captures a great deal of important information 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 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.

Resolve To Stay Alert

The basic capability provided by business activity monitoring systems, commonly called alerts, monitors the activity in your system and automatically notifies you, your staff, 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. As an example, you can schedule an e-mail to alert the purchasing manager when an item is below its minimum stock level at a warehouse. Never run out of that best seller again!



Alerts can even act as a complete receivables collections tool by notifying customers 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. However, you also may run alerts on demand 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

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(continued from cover)

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. 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 pager or cell phone, so you can reach the required person anywhere at any time.

Sage KnowledgeSync

One powerful business activity monitoring system available for Sage PFW is Sage KnowledgeSync, a Sage Endorsed Solution. KnowledgeSync comes in two editions: Professional and Enterprise. We'll review the features of the two editions and take a look at the new customizable dashboard recently added to the Enterprise Edition.

Professional Edition

The Professional Edition is a good way to get started with business activity monitoring. It comes with a broad set of pre-configured business condition triggers and events that you can start using immediately. These queries identify everything from overdue invoices to late deliveries, low stock conditions, and past due invoices. For each of the triggers that you want to use, you specify your organization's thresholds, such as dollar values, unit totals, and date ranges. Dozens of business condition triggers for Sage PFW data are included in the Professional Edition.

You can use up to 24 active events related to the triggers at one time. Each event may be configured for either a one-time alert, such as an order confirmation, or a repeat alert to be set to repeat until the condition is addressed,

such as a low stock level alert that periodically sends reminders until the stock level is replenished.

The Alert Message Editor allows you to design your e-mail content and format. When creating alerts, you also have the option to create summarized alerts. A summarized alert is a single alert message that contains details from multiple records in your database. For example, a single alert message can list all inventory items that need to be re-ordered. Each event can send e-mail alerts to an unlimited number of recipients.

Enterprise Edition

The Enterprise Edition adds power. You can modify the pre-configured triggers and create new ones. Alerts can be sent to a fax, pager, PDA, cell phone, FTP, or as a screen pop-up. It also includes the following features:

Forms and Reports Management: You can send forms and documents in several formats, and use embedded Crystal Reports to schedule, generate, and distribute reports. For example, automatically generate and send manufacturing completion reports via e-mail.

Cross-Application Monitoring: Monitor conditions in multiple software applications. If you use a Sage CRM or HR solution along with Sage PFW, you can configure alerts and workflows to work across these applications.

Workflow Execution: Update Sage PFW data at the same time as you send alerts. You can create a workflow with many different steps. For example, when processing a new order, you can send a confirmation to the client, send an alert to order fulfillment, a copy of the invoice to finance, and create a sale record in your CRM application.

Incoming E-mail Monitoring: The E-mail Response System (ERS) ensures that e-mail messages that are sent to generic e-mail addresses such as *info*, *sales*, or *support* are

identified, analyzed, and responded to.

Alert Failover System: The Alert Failover system warns you if events are not working properly, and allows you to reroute undeliverable alerts.



The new Dashboard for Sage KnowledgeSync can display summarized alerts in a Web page so you can monitor key events quickly and easily.

New Dashboards

Dashboards add a new way for the Enterprise Edition to deliver alerts. An alert can deliver content to an HTML Web page. Here are some ways to use this feature:

- » Display information by a specific business area— a sales manager may want to see all expiring sales orders.
- » Create user-specific display information, such as all the new orders for a specific user.
- » Display all alerts that pertain to a specific user using a User Alert listing. For example, an overdue opportunity, an unpaid invoice, and a form that needs to be completed—all of these disparate items can be placed on a single dashboard at the user's fingertips.

Please give us a call to discuss the benefits of implementing Sage KnowledgeSync in your company. ✨

Mitigate Risk With Sage PFW ERP

Have you visited the government Web site www.recalls.gov? The site provides a central location for consumers to view recalls. Recalls are becoming practically a weekly event, and the recent peanut butter-salmonella problem is just one among many. In this article, we will look at how the Sage PFW ERP manufacturing capabilities help you mitigate costs surrounding recalls and allows you to quickly comply with government regulations.

Government Regulations

A number of government regulations relate to the tracking and labeling of manufactured products. These regulations require organizations to be able to identify where and when its products were distributed, so that they can be recalled quickly and efficiently in the event of contamination or dangerous defects. Here are some examples of current regulations relating to these issues:

- » **Title 21 CFR Part 11** states the criteria in which electronic records and signatures can be considered equivalent to paper and handwritten signatures in manufacturing processes regulated by the FDA.
- » The **Bio Terrorism Act** requires bi-directional lot tracing. If a recall should occur, the FDA can require a list of all products that contain an ingredient, where the ingredient originated, and the location of the finished goods. They can require that all this information be supplied within 24 hours.
- » The **Food Allergen Labeling and Consumer Protection Act** requires that food manufacturers identify, in plain language, the presence of any of the eight major food allergens (Milk, Egg, Peanut, Tree Nut, Fish, Shellfish, Wheat, Soy) on their labels.

Sage PFW Features

Fortunately, Sage PFW provides capabilities that support compliance with these and other regulations, including robust labeling capabilities, a powerful lot recall report, and strong auditing tools. Here are some of the features Sage PFW provides:

Lot Traceability—The Lot Recall Report within the Sage PFW Production module allows you to trace complete histories and audit trails—forward and backward—from raw materials through shipment. By being able to identify exactly which lots contain suspect ingredients, you can minimize the scope of a recall should it occur, and manage it to a rapid conclusion.

Quality Control—You can minimize the possibility of bad batches by making full use of the quality control capabilities in the Production module. You can create your own quality control templates describing required tests, number of alterations, target results, and minimum-maximum ranges. The test results are retained for each batch in process and in batch history. Test results can be printed on batch tickets.

Labeling—The labeling module makes it easy to comply with newer food labeling requirements. Labels are highly accurate, since their contents can be based on either formulas or actual production entries. Custom calculations from the Laboratory module can be printed on labels as well. Since label information is created dynamically from current values in the database, labels are always up to date.

Material Safety Data Sheet—Similar to Labeling, the MSDS module streamlines the process of creating and printing material safety data sheets by reading information dynamically from the other modules. Formula information such as physical properties calculations can be read directly from the appropriate formula record.

AuditMaster—Sage PFW is built on the Pervasive database engine. Pervasive includes a powerful auditing tool, Auditmaster, the final tool in your arsenal to mitigate recall problems. It can be configured to monitor and report on any activity in real-time to enforce controls and safeguard the completeness and accuracy of sensitive data. It can track red flags, switches turned off and on, and other conditions that can compromise the integrity of your data. This level of tracking results in reduced exposure to losses from error or fraud.

No organization can be 100 percent secure from the possibility of a recall, but by utilizing the capabilities of Sage PFW, the chances of a recall can be minimized and, if one does occur, it can be quickly and accurately completed. Give us a call with your questions. ✨

((Tips & Tricks))

Announcing Tech Tuesdays

In line with the Sage commitment to make business management as simple as possible, a new series of Realtime Learning courses have been added. Realtime Learning combines the interaction of a classroom with the convenience of the Internet. Courses are led by a Sage trainer. Tech Tuesdays will cover technical topics to help you run Sage PFW smoothly on selected Tuesdays. The April session is on Optimizing Performance in Sage PFW, and the May session is titled Maximizing FRx for Your Sage PFW Data. For more information or to register, [click here](#).



IN THE SPOTLIGHT:

Your Input Can Make Sage PFW Even Better

Sage is committed to making business management easier for its customers. The new capabilities that were added to the Sage PFW ERP Version 5.7 release were included as a direct result of customer feedback. Sage is always looking for ways to improve the solution. Do you have ideas about ways to improve the software? In this article we will cover the enhancement process and explain how you can participate in making Sage PFW even better.

Collecting Ideas

In the first phase, the Sage PFW team collects ideas from a number of sources. As business partners, we often provide suggestions for enhancements directly to Sage. You can too. Simply go to Sage Software Online and fill out the form.

First, you select the product line (Sage PFW) and then the module for which you would like to see the enhancement. The form next asks you for the version number for which you requesting an enhancement. This is important, because if you are running an older version, the enhancement you are requesting may already have been added to the software.

After entering your contact information, you then choose the category for the enhancement. This helps the Sage PFW team organize the responses they receive. The choices are:

- » Features I would like to see added or improved
- » Tasks to make the product easier to use
- » Improvements to the installation process

- » Printing enhancements
- » Software or hardware compatibility
- » Other

In the next box, describe the enhancement you would like to see as clearly as possible. Be specific about what you want. For example, rather than just *add customer e-mail address*, you might say *add customer e-mail addresses, and make them available for lookup in Order Entry*.

The last box may be the most important. This box asks for the business reason for the enhancement request. This information helps the programmers understand why you are asking for the enhancement. They can then do a better job of programming it in a way that will make you daily tasks flow smoothly. Click submit and you are finished!

If you bookmark the enhancement request page, you can easily enter a new request as you think of it during your work day.

Annual Survey

When starting work on a new release, the Sage PFW team collects all the enhancement requests that have come in from customers and consultants, and creates a survey. This helps them identify which of the enhancement requests will be most useful to the largest number of customers. The enhancement requests will be prioritized according to their popularity. So when you receive your annual survey, be sure to take the time to fill it out, and vote for enhancements you wish to see.

Once the survey results are compiled and analyzed, a list of top enhancements is

identified for the next release. Designing, programming, and testing takes place over the course of the year, and when the new release has been fully tested and certified, it comes to you if you have a current subscription plan.

As you can see, the process takes some time. So don't wait to send your enhancement requests. Of course, we are always available if you need help explaining your requests; give us a call. ✨

Contact Information

Contact Information

