

Macola

Automated
Workflows

**Effectively monitor your
business in real time.**

The integration of automation and process flows – automated workflows – delivers real-time business activity monitoring to ensure that you respond quickly and optimally to developments in your business environment.

Exact Event Manager helps you keep track of business-critical “events” and define automatic responses based on pre-defined criteria. You are alerted to issues before they become larger problems. Automated responses reduce human error and save time.

Benefits include decreased costs, increased customer satisfaction and greater productivity. This factsheet contains examples of alerts that help organizations get a better grip on business processes. An alert may be an e-mail, fax, SMS or a workflow request.

Benefits of Automated Workflows

- Improve visibility & control of enterprise processes
- Reduce costs & increase revenue
- Reduce errors & improve accuracy
- Reduce manual effort & paperwork and increase productivity
- Spot bottlenecks & redundancies and increase efficiency

Financial Management Applications

- Notify sales reps when a client is placed on a credit hold
- Send alerts the instant a client’s account reaches a certain level
- Send order confirmations
- Be notified when stock is nearing its re-order level
- Alert customers when orders are shipped later than expected
- Inform customers about purchase bonus programs
- Prevent orders with unapproved discounts
- Save money by ensuring early payment discounts are earned
- Spot customers who haven’t ordered in over ‘x’ days
- Automatically email dunning notices or client statements
- Match incoming stock with outstanding backorders
- Alert staff to stock surpluses that will be written off if not sold immediately

Management Team

- Daily/weekly report on key figures/KPIs from ERP applications
- Liquidity management by means of a dashboard
- Alert in the event of budget overruns
- Reports available via Outlook or Synergy (intranet, internet)
- Management by Exception (alerts, possibly with drill-down)

Sales department

- Notification to account manager when a proposal turns into an order
- Automatically send out order confirmations by email or fax
- Automatically send out invoices by email or fax
- Automatically generate shipping documents, picking lists, labels, etc.
- Automatically import XML orders into your ERP environment
- Online overview of all backorders that have been open too long
- Notification to sales manager in the event of orders on which the margin is too low
- Alert or overview of customers who have not ordered anything in the past month

- Automatically link documents to sales orders
- All sales statistics available online
- Relevant customer information available to every account manager via web
- Notification of all credit notes sent to the sales manager
- Alert in the event of sales order rules where the margin < x%
- Alert in the event of sales order rules with a negative margin
- Sales order that have not been rounded off
- Alert in the event of sales order rules entered today, where the discount > x%
- Alert in the event of sales order rules entered today, where the sales price <> sales price in the price list
- Alert in the event of sales orders entered today, where the order value > “x”
- Alert in the event of sales orders entered today, where the method of payment = “Y”
- Alert or overview of open sales orders that should have been delivered
- Overview of orders that have to be delivered within x days
- Alert in respect of orders awaiting approval
- Alert in respect of open sales orders for blocked customers
- Show turnover from Macola in an empty field on customer’s card. This makes it possible to see at a glance what kind of turnover a customer has generated in a particular period
- Automatically generate and send out (appointment) confirmations
- Monitor end date and send out alert x months prior to the end date of contracts (of employees as well as sales or purchase contracts)
- Alert when address details of new customers are missing
- Alert in the case of customers with outstanding amounts > credit limit

Production Department

- Warning in the event of production orders with a negative production result
- Warning when ‘waste’ from production order / item exceeds x%
- Approved production orders for which insufficient inventory is available for production

- Alert when cost price on parts list differs from the cost price of an item
- Alert to sales representative if production order may be delivered late
- Alert or report on production orders that have not started on the scheduled starting date
- Alert or report on outstanding production orders that have passed the scheduled end date
- Warning in the event of items marked as 'unfinished' items without a parts list
- Alert in the event of parts list rules that are cancelled
- Alert or report on production orders that have been produced where the planned quantity > actual quantity

- Monitor items with serial / batch numbers that are about to expire
- Alert or report or automatic ordering of items that are within x% of the minimum inventory level
- Alert or report on items with cost price = 0.00
- Alert or report on items with negative inventory level
- Alert or report on items that have not been delivered in the past x days
- Alert or report on items that were supposed to have been delivered but that have not come in (inter-branch)

Supply Chain (MRP/ERP)

- Know when the delivery of a specific component needed for a project has been delayed
- Identify orders with configuration errors (such as missing parts)
- Monitor product cost and price variances?
- Know about suppliers who have a higher than average amount of damaged or defective items
- Balance stock overages and shortages across multiple locations?
- Notify staff about project approvals or disapprovals?
- Be alerted about personnel who won't be available for certain projects
- Automatically issue standing orders to your vendors?
- Be notified about scheduled maintenance on manufacturing machines

"Taking paper from departments—like production—and actually putting it into an electronic format... there was familiarity for the user going from paper straight to the screen so that kept the training necessary to get the product off the ground at a bare minimum."

- Instantly identify substantial drops in product margin
- Send an alert about abnormal stock utilization
- Alert staff and clients about defects discovered and/or fixed in your products
- Send an alert about excessive hours logged against a specific project
- Know immediately when exchange rates fluctuate and impact international shipments

Warehouse / Logistics Management

- Alert when the inventory level > desired maximum inventory (per item)
- Alert when an item is stored in several locations
- Warning when a serial / batch number expires

Purchasing

- Determine optimum order sizes
- Automatically order
- Automatically send out XML orders to suppliers
- Alert in respect of orders that come in late
- Alert in respect of orders that need to be approved
- Warning when delivery time > scheduled delivery time
- Amount on purchase invoice > amount on purchase order
- Alert in the case of deviating purchase prices (purchase price > regular cost price)
- Monitor purchase contracts
- Online monitoring of inventories / warehouses
- Automatic alert when items are possibly getting out of date
- Monitor the correct registration of warehouse releases
- Alert if merchandise is received from a supplier without accompanying purchase order
- Alert in the event of goods receipt deviations (quantity delivered > scheduled delivery date)
- Automatic alert in the event of a change in a supplier's bank details
- Monitor for outstanding purchase orders at blocked suppliers
- Daily / weekly report on goods received within x days

Accounting

- Automatically send out payment reminders
- Automatically check changes entered on the basis of various criteria
- Publish outstanding items on the intranet
- Liquidity management
- Report on budget overruns
- Automatically generate and distribute management summaries
- Publish blocked customers on the intranet
- Alert when customers exceed their credit limit
- Automatically import changes into ERP applications
- Automatic alert in the event of changes to a debtor's or creditor's bank details

"The paperless solution for invoice approval has sped up the process and enhanced traceability."

- Automatic alert in the event of changes to a debtor's or creditor's credit limit
- Alert when total outstanding items at debtor > "X"
- Alert in the event of a change in outstanding items in relation to 'payment conditions'
- Alert in the event of active assets in the system without financial transactions
- Alert in the event of active assets without value adjustments in recent months
- Warning when exchange rates were last updated x months ago
- Alert when outstanding items exceed the credit limit but have not been 'blocked'
- Automatic email when invoice (request) is outstanding for more than x days at budget holder
- Automatic reminder (email) when number of invoices in workflow is greater than X
- Automatic email when the number of invoices to be approved has exceeded an amount of X
- Alert or report on outstanding invoices that have been outstanding for more than x days
- Report on financial transactions that have not been processed at the time of the month-end accounts
- Report on non-allocated payments at the time of the month-end accounts
- Alert when the balance in bank account x goes below value y
- Alert to the budget holder when there is a new incoming invoice request in the workflow

"In one department, we dropped four hours every day on one task, and that's really just by using workflows and document management."

- Identify reps spending an average of more than 'x' minutes per call
- Be notified when there are more than 'x' high priority calls assigned to a single service rep
- Know which clients generate the least revenue and most support calls
- Automatically send a survey back to clients for certain types of closed calls
- Know about specific calls that have not been worked on in over 'x' hours or days
- Alert field technicians about delays to delivery of critically needed parts
- Notify a support rep that an incoming call is from a client who has pending sales opportunities

Customer Relationship Management (CRM)

- Ensure key activities are completed
- Make certain managers aware of specific sales opportunities
- Know in advance the state of a sales rep's pipeline
- Know which prospects haven't been contacted in 'x' days
- Send staff new literature and alert them about new competitors
- Notify reps when their accounts are modified by someone else
- Alert sales reps who don't synchronize on a timely basis
- Be notified when sales or support reps have greater than (or less than) 'x' calls, appointments, or sales
- Know the clients whose average sale price is greater than 'x'

Customer Service & Help Desk

- Know when support reps exceed a certain number of open calls
- Be alerted if you are about to miss meeting a service level agreement
- Know which service contracts are about to expire
- Know when a key client logs a high priority support call
- Immediately identify problem "hot spots" based on call trends

Service Department

- Monitor service orders that should have been rounded off
- Text message to service engineer in the event of emergency breakdowns
- Notification in respect of overdue services
- Automatic notification when contracts are about to expire and possibly automatic offer/proposal to customer for a new contract
- Automatic feedback on the status of a service notification to the customer
- Online overview and insight for every customer of the items for which your organization provides the maintenance, including historic service calls, on-going service calls, contracts, etc.

Facilities management

- Alert if an activity overruns the budget
- Monitor the extent to which procedures are accurately recorded and complied with
- Automatic communications such as confirmations, reservations, etc.
- Monitor planning of activities, rooms and resources
- Online insight into the availability of rooms and resources
- Monitor validity of contracts
- Automatically generate and distribute reports

HR Department

- Notification of birthdays, anniversaries, etc.
- Monitor for missing data in system (Social Security Number, birthday, bank account, etc.)
- Alert in the event of changes to data (Social Security Number, address details, bank account, etc.)

- Warning of the end date of an employee's contract
- Automatic alert when contracts of employment terminate
- Automatically report people in sick with industrial insurance board
- Automatic reminder of performance interviews
- Automatically generate and distribute management reports
- Check for double registration of assets per employee

Project Management

- Monitor budgets against actual costs
- Check whether the time sheets have been entered (correctly)
- Monitor the deadlines of sub-projects
- Online project monitor, also for all project assistants who do not have access to the applications used
- Automatically import project changes into applications
- Automatically generate and distribute project overviews
- Report on hours that still have to be approved over the past period (e.g. at the end of the month)
- Report on hours/installments not yet invoiced over the past period
- A notification to the project manager when an invoice has definitively been printed in Macola
- Alert for the 40 hours check. For instance, send out an email if the number of hours realized at the end of the week is < than the employee's work schedule
- Alert when the number of hours defined in the budget is exceeded

A Few More Benefits for the Entire Business

Email Automations

- Determine if an incoming email is from a client
- Send automated replies in response to incoming email
- Eliminate that "generic" mail account that is like a black hole for messages
- Automatically add the contents of an incoming message to a contact's record
- Schedule intelligent and timely follow-up actions based on the receipt of a certain type of email
- Monitor the quantity of email that you get from various clients
- Turn incoming email leads into actionable database records
- Know when your best clients email you
- Forward critical mail messages to an employee's pager, PDA, or cell phone
- Allow clients to update their own support calls via email
- Ignore undeliverables

Report Generation & Distribution Automations

- Automatically generate and distribute frequently needed reports
- Trigger a sales report only if revenues are above or below a certain level
- Enable users to request and receive support call reports without bothering a service rep
- Automatically generate & send a report everyday at 5 p.m. to your users of their overdue activities
- Avoid sending a blank report to people if there is no data to report on
- Email or fax important reports to remote or offsite personnel
- Automatically distribute new literature in PDF format
- Automatically distribute newsletters to clients
- Record when reports are sent to someone in his/her contact record
- Empower users to use email to request the receipt of a specific report
- Automatically generate and distribute a report based on activities that occurred "today," "yesterday," "last week," or "last month"

People Management Automations

- Automatic report of any change of address in the system
- Alert in the event of an anniversary
- Alert in the event of a birthday of a subordinate
- Monitor end date of employee contracts

Macola is ERP and business software that manufacturers and distributors use to automate, manage and grow their businesses. The software empowers companies to take control of cost and complexity at every critical stage from design through delivery and see all facets of their business from a single application.

Macola is an Exact product. Exact builds business software for SMEs and their accountants. Our innovative technology is aimed at specific business needs, providing an overview of today and insights into the opportunities of tomorrow. Exact inspires businesses to grow. Our 1,600 employees love, share and support our customers' ambition. Like them, we aim high. Like them, we aspire to lead the way. That's how we know it's a bumpy road to success. And that's why we build software to help smooth it out, enabling our customers from all over the world to grow.

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What About Our Social Media Links?

-  facebook.com/ExactMacola
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