What Benefits Can EBSAlerts Offer Your Clients?

EBSAlerts provides clients with **four core capabilities**:

I. Trigger flexible, intelligent Alerts (via e-mail, fax, pager, PDA, cell phone, screen pop, FTP, and web browser) based on important, time-sensitive application data.

- Send alerts based on data conditions within a single application (e.g., "alert the account manager to clients with pending sales opportunities who have not been contacted in over a week")
- Send alerts based on data conditions across multiple applications (e.g., "alert the sales manager to clients with pending sales opportunities in a CRM application who are on credit hold in a financial application)
- Send one-to-one marketing alerts (e.g., "alert existing clients in the financial industry who have purchased our Fixed Assets application that the new advanced depreciation module is now available for purchase")
- Send alerts about 'exception management' (e.g., "alert management to erroneous, missing, or inconsistent data entry, such as an invalid e-mail address or phone number, or missing notes about an upcoming appointment")
- Send alerts based on sophisticated Business Intelligence & Data Mining (e.g., "see if a client has altered their buying habits by more than 25% from their monthly average, and if so, notify their salesrep")

II. Monitor incoming email, auto-respond to the messages, update your applications based on message content, & route the messages to the right people.

- When someone sends an email message to support@yourcompany.com, have EBSAlerts check the sender against your contact database, and then create a support ticket and send the ticket number back to the sender.
- When someone fills out a web form requesting product information, have EBSAlerts determine what type of information is being requested, send it back to the requestor, and schedule a follow-up phone call to that client in your CRM application.
- When someone places an order with your organization via email or web form, have EBSAlerts create the corresponding order record in your Financial application and send an invoice back to the person who placed the order.
- When someone fills in a form on a website requesting that someone contact them, have EBSAlerts identify where the client is located (based on their entry) and forward the request to the account rep who handles that territory.
- Instead of having clients call your support staff and request that a specific report be run, create a "Report Self-Service Form" on your website that allows clients to request specific reports which are then run by EBSAlerts and automatically delivered back to the client.

III. **Trigger the creation and delivery of relevant Forms, Documents, and Reports based upon either application conditions or based upon a recurring schedule.**

- Automatically generate and distribute business reports on a periodic basis (e.g., "every Monday morning at 9:00 AM, generate and distribute the Sales Forecast Reports and Last Week's Service Statistics Reports")
- Trigger the creation and delivery of Forms when business conditions warrant it (e.g., "when a new order is placed in our financial system, automatically create an Invoice or Statement and email to the corresponding client")
- Trigger the creation and delivery of Documents when business conditions warrant it (e.g., "generate and deliver a Dunning Notice to a client when their over 90 Day Receivables balance exceeds $10,000")
- Trigger the creation and delivery of Analytical Reports when certain conditions occur (e.g., if a certain stage of a salesrep's pipeline has less than $25,000 in forecast sales, generate an Opportunity Summary Report for that salesrep and send that report to the rep's manager")
- Have EBSAlerts generate Forms, Documents, and Reports and (instead of emailing them to the appropriate recipients), have EBSAlerts post the reports to one or more websites where the recipients can access, read, and download them.

IV. **Trigger workflow & other application updates based on business conditions and/or activities.**

- Create intelligent follow-up activities (e.g., "if a prospect has not been contacted within the last 7 days, have EBSAlerts schedule a phone call in the CRM application")
- Update a contact's history based on business activities (e.g., "when EBSAlerts sends a client a dunning notice from a financial application, have EBSAlerts update the contact's history in the related sales application")
- Create new contact records (e.g., "if a new prospect requests product literature from your website, have EBSAlerts add that prospect to your contact database")
- Keep multiple databases in sync with each other (e.g., "if a contact's address is manually changed in one application, have EBSAlerts update the corresponding client record in other related application databases)
- Create purchase orders based on inventory levels (e.g., "if an item gets to within 10% of its reorder level, have EBSAlerts automatically create a purchase order record for that item")

About Employee Based Systems

Employee Based Systems Inc. Littleton, CO is a full service software consulting and development firm specializing in design, implementation, and support of Time and Labor Management, Human Resources, and Payroll software solutions. EBS was found by Jim Duty, a pioneer in the development of Time and Labor management software that tracks individual employees work hours, schedule and attendance.

Employee Based Systems mission is to- Help Companies ensure excellence by providing them with high-quality products and services that perform beyond their expectations. With over 2 decades in the industry, and a seasoned staff of developers, consultants, and technical support personnel, Employee Based Systems is the premier choice for all your software needs in these areas.

www.ebsalerts.com sales@ebstime.com 303-991-3500