

SAGE KNOWLEDGESYNC

by Vineyardsoft Corporation

Sage Accpac ERP Pre-Configured Queries

Sage KnowledgeSync comes with an extensive collection of pre-configured Alert Events and Alert Condition "Triggers". The following list is of the pre-configured Triggers; note that wherever a trigger refers to a variable (i.e., an 'x' or 'y'), the Trigger will allow you to specify the exact Trigger Threshold that you want KnowledgeSync to monitor for.

Users of Sage KnowledgeSync Professional Edition will be able to use ANY of the following Triggers and will be able to specify their own Trigger Thresholds. Professional Edition users will not be able to modify these pre-configured Triggers nor create additional Triggers of their own.

Users of Sage KnowledgeSync Enterprise Edition will be able not only to use any of the following Triggers, but will also be able to customize these Triggers and create an unlimited number of additional Triggers in the KnowledgeSync application.

Customer (& A/R) Triggers:

Customers; Added Today
Customers; Balance Due < 0 (Credit Balance)
Customers; Balance Due > 'x'
Customers; Balance Due > 'x' and No Payments Received
Customers; Credit Card Expires Within 'x' Days
Customers; Credit Limit Has Changed
Customers; Credit Used > 'x' Percent
Customers; Last Payment Was > 'x' Days Ago & Balance > 0
Customers; Past Due Balance > 'x' and No Payments Received
Customers; Payment Terms Have Changed
Customers; Primary Salesrep Has Changed

Inventory Control Triggers:

Inventory Pricing; Base Price Has Changed
Inventory Pricing; Sale Begins in 'x' Days
Inventory Pricing; Sale Ends in 'x' Days
Inventory; Items; Inactivated Today
Inventory; Items; Most Recent Cost < Last Cost
Inventory; Items; Most Recent Cost > 'x' Pct Over Last Cost
Inventory; Items; Qty On Hand - Qty On SalesOrder < 'x'
Inventory; Items; Qty On Hand + On Order > 'x'
Inventory; Items; Qty On Hand > 'x'

Sales Order Triggers:

Orders; Count; > 'x' Placed for Client 'x' Over Date Range
Orders; Due to Ship Within 'x' Days
Orders; Hold Status is Changed
Orders; Invoice Discount Percent > 'x'
Orders; Line Items; BackOrdered

Vineyardsoft Corporation
Tel: 508.696.6495
sales@sageknowledgesync.com
<http://www.sageknowledgesync.com>

Orders; Line Items; Gross Profit < 'x' Percent
Orders; Line Items; Gross Profit > 'x' Percent
Orders; Line Items; More than 'x' of Item 'y' Ordered
Orders; On Hold
Orders; Placed Today (w/ Detail Lines)
Orders; Ship Date is Changed
Orders; Total; < 'x' Dollars Placed by Salesperson 'x' Over Date Range
Orders; Total; > 'x' Dollars Placed by Salesperson 'x' Over Date Range

Vendor Triggers:

Vendors; Added Today
Vendors; Avg Days to Pay > 'x'
Vendors; Balance Due > 'x'
Vendors; Primary Email Address is Blank
Vendors; Primary Email Address is Changed

A Note About Trigger Design:

Although referred to as “Triggers”, these event conditions are designed using a wizard-driven “Query Design Module” and require no technical expertise or programming skill to create. As long as you have access to information about an application’s database schema (which tells you what data is stored within which tables in an application), you have all the knowledge required for the creation of KnowledgeSync queries.

If additional assistance is required in the creation of KnowledgeSync queries (triggers) or events, please contact your Sage Business Partner or KnowledgeSync Partner Services.