

ACT! by Sage 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.

Company & Contact Triggers:

Companies; Created Today
Contacts; Created Today
Contacts; Last Attempted Contact > 'x' Days Old
Contacts; Last Attempted Contact Date is Blank
Contacts; Last Letter Sent > 'x' Days Old
Contacts; Last Letter Sent Date is Blank
Contacts; Last Meeting > 'x' Days Old
Contacts; Last Meeting Date is Blank
Contacts; Last Reach Date > 'x' Days Old
Contacts; Last Reach Date is Blank

Opportunity Triggers:

Opp Line Items; Discount is > 'x' Percent
Opp Line Items; Total; > 'x' Units of Item 'y' Sold Between 'a' and 'b'
Opportunities; Closed Ahead of Schedule
Opportunities; Closed Later than Forecast
Opportunities; Closed Today
Opportunities; Count; < 'x' Orders Open for Any Salesrep
Opportunities; Count; > 'x' Orders Lost Vs Any Competitor Between 'y' and 'z'
Opportunities; Count; > 'x' Orders Open for Any Salesrep
Opportunities; Count; > 'x' Orders Won Vs Any Competitor Between 'y' and 'z'
Opportunities; Created Today
Opportunities; Created Today for > 'x' Dollars
Opportunities; Due to Close Within 'x' Days
Opportunities; Due to Close Within 'x' Days; Probability from 'y' to 'z'
Opportunities; Lost to Competitor 'x' Between Dates 'y' and 'z'
Opportunities; Open for > 'x' Days
Opportunities; Open; in Stage 'x'
Opportunities; Overdue for Closing
Opportunities; Overdue for Closing by > 'x' Days

Opportunity Triggers (con't):

Opportunities; Status Has Changed
Opportunities; Status Has Changed from 'Inactive'
Opportunities; Status Has Changed to 'Inactive'
Opportunities; Status Has Changed to 'Lost'
Opportunities; Status Has Changed to 'Won'
Opportunities; Total; < 'x' Dollars Open for Any Salesrep
Opportunities; Total; > 'x' Dollars from Source 'x' Between Dates 'y' and 'z'
Opportunities; Total; > 'x' Dollars Inactive for Any Salesrep
Opportunities; Total; > 'x' Dollars Lost by Any Salesrep Between Dates 'x' and 'y'
Opportunities; Total; > 'x' Dollars Lost Vs Any Competitor Between 'y' and 'z'
Opportunities; Total; > 'x' Dollars Open for Any Salesrep
Opportunities; Total; > 'x' Dollars Sold to Any Client Between Dates 'x' and 'y'
Opportunities; Total; > 'x' Dollars Won by Any Salesrep Between Dates 'x' and 'y'
Opportunities; Total; > 'x' Dollars Won from Source 'x' Between Dates 'y' and 'z'
Opportunities; Total; > 'x' Dollars Won Vs Any Competitor Between 'y' and 'z'
Opportunities; Won Against Competitor 'x' Between Dates 'y' and 'z'

Product Triggers:

Products; Added Today
Products; Margin is < 'x' Percent
Products; Margin is > 'x' Percent

Other Triggers:

Activities; Scheduled for Today
Subscribers (ACT! Users)

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.