

# SAGE KNOWLEDGESYNC

by Vineyardsoft Corporation

## Sage BusinessWorks Pre-Configured Events

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.

### **Accounts Payables Triggers:**

AP Invoices; Discount Expires Today  
AP Invoices; Discount Expires Within 'x' Days  
AP Invoices; Due Today  
AP Invoices; Due Within 'x' Days  
AP Invoices; For Vendors On Hold  
AP Invoices; More Than 'x' Unpaid Dollars Per Vendor  
AP Invoices; More Than 'x' Unpaid Invoices Per Vendor  
AP Invoices; Overdue for Payment

### **Accounts Receivables Triggers:**

AR Invoices Due Within 'x' Days  
AR Invoices Overdue for Payment  
AR Invoices; Freight is > 'x' Percent of Order Total  
AR Invoices; More Than 'x' Dollars Per Customer  
AR Invoices; Paid Today  
AR Invoices; Salesreps Whose Average Sale < 'x'  
AR Invoices; Salesreps With Total Sales > 'x'

### **Customer Triggers:**

Customers; Available Credit < 'x'  
Customers; Credit Limit is Changed  
Customers; Current Open Balance > Credit Limit  
Customers; Current Open Balance > 'x'  
Customers; On Credit Hold  
Customers; Open Balance + On Order - (Deposits+Credits) > Credit Limit  
Customers; Who Have Not Ordered Within 'x' Days

Vineyardsoft Corporation  
Tel: 508.696.6495

<http://www.sageknowledgesync.com>  
[sales@sageknowledgesync.com](mailto:sales@sageknowledgesync.com)

**Employee Triggers:**

Employees; Next Review Within 'x' Days  
Employees; Using More Sick Hours Than Earned  
Employees; Using More Vacation Hours Than Earned

**Inventory Item Triggers:**

Inventory; At 'x' Percent Over Stock Maximum (Surplus)  
Inventory; BackOrdered Qty > 'x'  
Inventory; On Hand Qty - Committed Qty < Minimum Balance  
Inventory; On Hand Qty < Minimum Balance  
Inventory; Within 'x' Percent of Re-Order Level

**Quote Triggers:**

Quotes; Due to Expire in 'x' Days  
Quotes; Open; Probability of Closing > 'x'

**Vendor Triggers:**

Vendors; On Hold  
Vendors; With Balance > 'x'  
Vendors; With Open Credit Balance > 'x'

**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.