

# SAGE KNOWLEDGESYNC

by Vineyardsoft Corporation

## Sage MAS 500 ERP 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; Reoccurring Vouchers; Created Today  
AP; Reoccurring Vouchers; Ending Today  
AP; Reoccurring Vouchers; Starting Today  
AP; Vendor Invoices > 'x' Paid Today  
AP; Vendor Invoices Paid Today  
AP; Vendor Invoices Paid Today & Discounts Taken  
AP; Vendor Invoices Today's Transactions  
AP; Vendor Invoices Voided Checks  
AP; Vendor Vouchers; Discounts Expiring in 'x' Days  
AP; Vendor Vouchers; Due in 'x' Days  
AP; Vendors; Balance Due; Invoices 'x' to 'y' Days Old

### **Accounts Receivables Triggers:**

AR; Aged Balances; > 'x' Clients with Category 4 Aging > 'x'  
AR; Aged Balances; Category 1 Aging > 'x'  
AR; Aged Balances; Category 2 Aging > 'x'  
AR; Aged Balances; Category 3 Aging > 'x'  
AR; Aged Balances; Category 4 Aging > 'x'  
AR; Aged Balances; Current Balance > 'x'  
AR; Aged Balances; Total Open Balance > Credit Limit  
AR; Aged Balances; Total Open Balance > Credit Limit by > 'x' Pct  
AR; Aged Balances; Total Open Balance > 'x'  
AR; Aging Last Run > 'x' Days Ago  
AR; Clients Whose Avg Days Past Due > 'x'  
AR; Clients Whose Avg Days to Pay > 'x'  
AR; Clients with Credit Future Balances  
AR; Customers; Placed On Credit Hold  
AR; Invoices; Confirmation (Report Feed)  
AR; Invoices; Created Today

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**Accounts Receivables Triggers (con't):**

AR; Invoices; Created Today; Discount is > 'x' Percent  
AR; Invoices; Discounts Not Taken  
AR; Invoices; Due Today  
AR; Invoices; Due Within 'x' Days  
AR; Invoices; Overdue  
AR; Invoices; Overdue by More Than 'x' Days  
AR; Invoices; Pending & On Hold  
AR; Invoices; With Outstanding Balances  
AR; National Accounts; On Credit Hold  
AR; Payments Received Today

**General Ledger Triggers:**

GL; Account Status Changed  
GL; New Account Created Today  
GL; Accounts Availability Ending Today  
GL; Accounts Effective as of Today  
GL; Transactions for Acct 'x' Credits Greater than 'y'  
GL; Transactions for Acct 'x' Debits Greater than 'y'

**Inventory Control Triggers:**

IC; Demand is > 'x'  
IC; Inventory Item Whose Std Cost Has Changed  
IC; Inventory Item Whose Std Price Has Changed  
IC; Inventory Job Whose Status Has Changed  
IC; Inventory Job Whose Status Has Changed to 'x'  
IC; Item Qty On Hand  
IC; Items Out of Stock at Warehouse  
IC; Last Item Cost < Avg Unit Cost  
IC; Last Item Cost > 'x' Percent Increase Over Avg Cost  
IC; Last Physical Count Variance is > 'x'  
IC; Lots Expired as of Today  
IC; Lots Expiring in 'x' Days  
IC; New Inventory Items Added  
IC; Price List; Changes Made to Any Prices  
IC; Quantity is at or Below Safety Stock Level  
IC; Quantity on Backorder > 'x'  
IC; Quantity on Purchase Order > 'x'  
IC; Quantity on Standing Order > 'x'  
IC; Quantity on Work Order > 'x'  
IC; Sales Promotion; Expires Today  
IC; Sales Promotion; Expiring in 'x' Days  
IC; Warehouse Created Today  
IC; Warehouse Items Created Today

**Project Accounting Triggers:**

Proj Accting; Actual Costs Between 'x' and 'y' Pct of Estimated  
Proj Accting; Completed Today  
Proj Accting; Due for Completion in 'x' Days  
Proj Accting; Due for Review Today  
Proj Accting; Due for Start Today  
Proj Accting; Overdue for Completion

**Purchase Order Triggers:**

Purchase Orders; Balances Open for More Than 'x' Days  
Purchase Orders; Created for > 'x' Dollars  
Purchase Orders; Created Today  
Purchase Orders; On "Hold"  
Purchase Orders; On Credit Hold  
Purchase Orders; Open Balances; With Fluctuating Exchange Rates  
Purchase Orders; Shipping Address Has Been Overridden  
Purchase Orders; Total Open Balance Per Vendor > 'x'  
Purchase Orders; With Open Balances > 'x'  
PO Lines; Item Cost Exceeds Replacement Cost  
PO Lines; Items Late for Receipt

**Other Triggers:**

Cash Mgmt; Balance in Account 'x' < 'y'  
Cash Mgmt; Balance in Account 'x' > 'y'  
Contacts for Customers  
Customers; New  
Customers; Updated Today  
Exchange Rates; Effective Today  
Exchange Rates; Expiring Today  
Inspections; Type 'x' Due in 'y' Days  
Inspections; Type 'x' Overdue  
RMAs; Created Today  
RMAs; Created Today for > 'x' Dollars  
Sales Orders; Placed Today for > 'x' Dollars  
Sales Orders; Shipping Address Has Been Overridden  
Salespersons in MAS500  
Salespersons; With Blank E-Mail Addresses  
Security Group Data; Added or Updated Today  
Survey; Order Follow-Up After 'x' Days  
Users; Added or Changed Today  
Vendors; Created Today  
Vendors; Updated Today  
Work Orders; Scheduled to Finish Today  
Work Orders; Scheduled to Start Today

**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.