

# SAGE KNOWLEDGESYNC

by Vineyardsoft Corporation

## Sage Pro 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.

### **A/P Triggers:**

AP; Checking Accts; Bal < 'x'  
AP; Checking Accts; Bal > 'x'  
AP; Checking Accts; Created Today  
AP; Checks for > 'x' Amount  
AP; Checks Written Today  
AP; Distributions of Type 'x' Processed Today  
AP; Distributions Processed Today  
AP; Overdue Payments  
AP; Payments Due in 'x' Days  
AP; Total Checks to One Vendor > 'x' Written Today  
AP; Total Checks Written Today > 'x'

### **A/R Triggers:**

AR; Cash Transactions Made Today > 'x'  
AR; Credit Cards; Added Today  
AR; Credit Cards; Expiring Within 'x' Days  
AR; Customer Sales for Year Period > 'x'  
AR; Invoice Detail Lines Backordered  
AR; Invoice Detail Lines Discount Pct > 'x'  
AR; Invoices added Today > 'x'  
AR; Invoices Due Today  
AR; Invoices Due Within 'x' Days  
AR; Invoices Overdue  
AR; Refund Checks Issued Today  
AR; Total; Salesreps > 'x' in Overdue Invoices  
AR; Transactions; Salesreps with < 'x' Dollars Between 'x' and 'y'  
AR; Transactions; Salesreps with > 'x' Dollars Between 'x' and 'y'  
AR; Transactions; Today's Backorders

Vineyardsoft Corporation  
Tel: 508.696.6495  
sales@sageknowledgesync.com  
[www.sageknowledgesync.com](http://www.sageknowledgesync.com)

**A/R Triggers (con't):**

AR; Transactions; Today's Finance Charges  
AR; Transactions; Today's Order Lines For > 'x' Dollars  
AR; Transactions; Today's Order Lines For > 'x' Units  
AR; Transactions; Today's Order Lines Where Profit Margin < 'x'  
AR; Transactions; Today's Order Lines Where Profit Margin > 'x'  
AR; Transactions; Today's Returns / Negative Adjustments

**Inventory Triggers:**

IC; Items Added to Locations Today  
IC; Items in Location; Below their Order Point  
IC; Items in Location; Last Cost < Std Cost  
IC; Items in Location; Last Cost > 'x' Pct Increase Over Std Cost  
IC; Items in Location; Not Sold in > 'x' Days  
IC; Items in Location; On Hand Qty > 'x'  
IC; Items In Location; Qty On Purchase Order > 'x'  
IC; Locations; New  
Item Master; Item Price Has Changed  
Item Master; Item Status Has Changed  
Item Master; Last Sale > 'x' Days Ago  
Item Master; New Items  
Item Master; Total On Hand Qty > 'x'

**Job Triggers:**

Jobs; Added Today  
Jobs; Due for Completion in 'x' Days  
Jobs; Due for Completion Today  
Jobs; Overdue for Completion

**Purchase Order Triggers:**

PO Lines; On Backorder  
PO Lines; On Backorder and Overdue for Delivery  
PO; Added Today  
PO; Blanket POs Added Today  
PO; Blanket POs; Status is Changed  
PO; Required Within 'x' Days

**RFQ/RMA Triggers:**

RFQ; Added Today  
RFQ; Expires Today  
RFQ; Response Due Today  
RMA; Added Today

**Other Triggers:**

EFT; Today's Transactions  
Exchange Rates; Effective Today  
Exchange Rates; Expiring Today  
GL Accounts; Added 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.