

SAGE KNOWLEDGESYNC

by Vineyardsoft Corporation

Sage SalesLogix 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.

Account & Contact Related Triggers:

Accounts; Credit Rating is Changed
Accounts; Modified Today; Status 'x'
Competitors; New
Contacts; Added Today
Contacts; All
Contacts; Email Address is Changed
Contacts; New
Contacts; Status Has Changed
Contact Look-Up for Match to Incoming Email Address
Contacts; All for Account; When New Contact is Added
Contacts; With 0 or > 3 Support Calls in Last 6 Months
New Contact; Send Alert listing All Contacts
Prospects; All for Industry 'x'

Activity Related Triggers:

Activities; Less Than 'x' Minutes Scheduled Per SalesRep
Activities; Created Today by Users Other Than Account Manager
Activities; Modified Today by Users Other Than Account Manager
Activities; Scheduled for Tomorrow
Activities; Created Today; Notifications for Contacts
Activities; Overdue for Completion
Activities; Fewer Than 'x' Scheduled Per SalesRep
Activities; Rolled Over
Activities; Count Per Salesrep; Overdue for Completion
Calls; Fewer Than 'x' Scheduled Per SalesRep
Notes; Made by Users Other Than Account Manager
No Contact 48 Hrs
To-Do's; Fewer Than 'x' Scheduled Per SalesRep

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Literature Related Triggers:

Literature Fulfillment; Status Alerts
Literature; New
Library Files; New
Library Files: Revised
Products; New

Opportunity Related Triggers:

Oppty; Less Than 'x' Dollars in Stage 'y' of a Salesrep's Pipeline
Oppty; More Than 'x' Minutes of Scheduled Activities Per SalesRep
Oppty; New
Oppty; More Than 'x' Opportunities Won Against Competitor 'y'
Oppty; More Than 'x' Opportunities Lost Against Competitor 'y'
Oppty; More Than 'x' Dollars Won Against Competitor 'y'
Oppty; More Than 'x' Dollars Lost Against Competitor 'y'
Oppty; Closed in Less Than 'x' Days
Oppty; Open; Due to Close This Month Whose Sales Amt > 'x' Dollars
Oppty; Lost Today
Oppty; Total Sales Per Account Manager for Current Month
Oppty; Modified Today by Someone Other Than Account Mgr
Oppty; Won Today
Oppty; Due to Close; Probability > 'x'; Not in Final Stage
Oppty; Forecast Probability, Amount or Close Date is Changed
Oppty; Open; Total Per Customer > 'x' Dollars
Oppty; Created Within the Last Day
Oppty; Date Changes
Oppty; Changed
Oppty; Created Within the Last Two Days
Oppty; Open; Due to Close This Month Whose Weighted Amt > 'x' Dollars
Oppty; Orphaned
Oppty; Overdue for Closing
Oppty; Total Per Client > 'x'
Oppty; Closed Today
Oppty; Including Product Details
Oppty; Products; Total On Order Per Product
Opportunities; Forecast Amt, Close Date, Prob Changed

Synchronization Related Triggers:

Sync Server; Last Run Did Not Complete Successfully
Sync Server; Not Responding for > 'x' Hours
Users; Who Haven't Synched in > 'x' Days

Support Tickets Related Triggers:

Calls; Support; Avg > 'x' Minutes Per Rep
Calls; Support; More Than 'x' Calls Per Account
Support Tickets Open > 'x' Hours
Support Tickets; New
Support Tickets; Closed
Support Tickets; Priority is Changed
Support Tickets; Re-Assigned
Support Tickets; Urgency 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.