

# SAGE KNOWLEDGESYNC

by Vineyardsoft Corporation

## Sage Timberline 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.

### **Customer (& A/R) Triggers:**

AR; Customers; Credit Limit Has Changed  
AR; Customers; Credit Rating Has Changed  
AR; Customers; Credit Rating Has Changed to 'x'  
AR; Customers; Outstanding A/R Balance > Credit Limit  
AR; Customers; Used Up > 'x' Percent of Credit Limit  
AR; Customers; 31 - 60 Day Balance > 'x'  
AR; Customers; 61 - 90 Day Balance > 'x'  
AR; Customers; 91 - 120 Day Balance > 'x'  
AR; Customers; Current Balance > 'x'  
AR; Customers; Future Aging Balance <> '0'  
AR; Customers; Last Aging > 'x' Days Ago  
AR; Customers; Last Payment Was > 'x' Days Ago (Bal > '0')  
AR; Customers; Over 120 Day Balance > 'x'  
AR; Customers; Total Outstanding Amount > 'x'

### **Accounts Payable Triggers:**

AP; Invoices; Count; Open Per Vendor > 'x'  
AP; Invoices; Created Today for > 'x' Dollars  
AP; Invoices; Discount Date is Today  
AP; Invoices; Discount Date is Within 'x' Days  
AP; Invoices; Due Back Within 'x' Days  
AP; Invoices; On Hold  
AP; Invoices; Open  
AP; Invoices; Payment Due Within 'x' Days  
AP; Invoices; Status Has Changed to "Fully Paid"  
AP; Invoices; Total; Open Dollars Per Vendor > 'x'  
AP; Vendors; Outstanding Amount > 'x'  
AP; Vendors; Placed on Credit Hold

**(Support-Related) Issue Triggers:**

Issues; Count; More Than 'x' New with Urgency 'y'  
Issues; Count; More Than 'x' Open with Urgency 'y'  
Issues; Due Date is Today  
Issues; Due Within 'x' Days  
Issues; Have Been Closed  
Issues; New

**Job Triggers:**

Jobs; Completed Earlier Than Estimated  
Jobs; Completed Today  
Jobs; On Hold  
Jobs; Past Estimated Start Date & Unstarted  
Jobs; Revised Completion Date Has Changed  
Jobs; Scheduled to Start in 'x' Days  
Jobs; Starting on a Date Other Than Estimated  
Jobs; Status Has 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.