

SAGE KNOWLEDGESYNC



Business Activity Monitoring

A Smoke Detector for Your Business

Business Activity Monitoring. Every organization has critical information and transactions that need monitoring. A prospect who has not been followed-up with; a contract that is about to expire; a pricing error. Sage KnowledgeSync monitors all your business data – both within your Sage Software product lines, and beyond. Providing every organization with much-needed Exception Management, Sage KnowledgeSync identifies and responds to conditions that fall outside of an organization’s standard operating procedures and enables organizations to avoid saying “If only we had known”.

Automatic Form, Document, & Report Delivery

Most organizations today spend far too much time manually running, distributing, and delivering various forms, documents, and reports to both their internal employees and external clients and partners. Sage KnowledgeSync automates both the production and delivery of such documents, whether it’s sending quotes, invoices, or letters to clients, or distributing analytical reports to an organization’s own managers and executives. Using the industry-standard Crystal Reports, Sage KnowledgeSync generates forms and documents when needed – or when business conditions demand it – and delivers this information to the right people at the right time.

Intelligent Workflow & Business Process Automation

Sage KnowledgeSync does more than just send alerts; it triggers “workflow” to update your applications, schedule intelligent tasks, and move information between an organization’s disparate software systems. Whether it’s to update a client’s history based on the receipt of an email message from them, or to schedule a phone call for a prospect who has not been contacted within the last week, Sage KnowledgeSync gives organizations the means to automate (and monitor) critical business processes.

BENEFITS

Notify staff about critical business issues – when they occur – and not hours, days, or weeks later

Identify trends or problems across your entire business by combining and analyzing information from multiple systems

Synchronize data between multiple business applications & identify inconsistencies between databases

Push client or partner specific information out to a web browser for easy, self-service access

Know when someone changes a critical piece of business information – like a contract renewal cost or a client’s credit limit

Be alerted – and trigger automatic corrections – when potential problems appear in your Windows operating systems

Monitor activity on your website and auto-process information requests and/or questions from prospects or clients
Combine all your applications – including homegrown solutions – under one Business Activity Monitoring solution, and create a central point for business process management

Enable “follow-me alerts” that know when and where to find you based on the time of day and day of the week

Get an immediate ROI due to free, pre-configured collections of alerts for use with all Sage Software business applications

FEATURES

Enterprise Class Architecture	Sage KnowledgeSync uses the industry-standard Microsoft SQL Server database for unequaled data processing speed, flexibility, and scalability. SQL Server Express or Microsoft Access are also available as database options.
Integration with Industry Standards	Supports Microsoft Exchange (Outlook) email, Internet (SMTP), and Lotus Notes Mail for both alerts and monitoring incoming email messages. Includes integration with Microsoft Fax and browser-based alerts through Microsoft Internet Explorer.
Wizard-Driven Event Designer	No programming or SQL expertise needed. Wizard-driven process walks through event design steps, including trigger definition and message design. Automatic HTML message design output available without HTML coding.
Complete Event Audit Trail	On-line history of triggered events, delivered alerts, and executed workflow. Includes whether alert was successfully delivered, time of delivery, and names of attached reports & forms. Also includes utilization reporting for event optimization.
Alerting Via Email, Fax, Pager, Screen Pop & Web Browser	Alert recipients can receive information via any combination of email, fax, pager (including SMS paging), screen pop, FTP (for document & report delivery), and web browser. No additional hardware or software is required.
Form & Document Delivery in All Standard Formats	Includes order confirmations, invoices, statements, dunning notices, newsletters, & picking lists in HTML, PDF, Word, Excel, or other formats. Delivery may be scheduled or it may be based on business transactions or application activity.
Dynamic Date Calculations	Allows monitoring of activity taking place "today", "tomorrow", "yesterday", "last week", "next week", "current month", and so on. Special "last check" processing optimizes system resources by dynamically identifying new and/or changed data.
Flexible Message Formatting	Includes "header" & "detail" sections, customizable grouping, executive summary, task-level listings, & record-level alerts to clients. Supports currency & numeric formatting as well as controls for columnar display and unlimited free-format text.
Intelligent Alert Recipients	Includes client's salesrep, his/her manager, & other responsible parties. Supports workdays/hours, and home vs work delivery addresses. Alert recipient data from all Sage apps is automatically linked to KnowledgeSync with no re-entry of data.
Limitless Scheduling Options	Includes every 'x' hours/minutes, daily at specific times, named day (e.g., every Monday at 9 AM), & numbered day (e.g., first Monday, third Thursday). Incoming mail monitored every 'x' minutes. Holidays and event dependencies supported.
Scheduled & Triggered Report Distribution	Generate & distribute an unlimited number of Crystal Reports (forecast reports, activity reports, etc.) to unlimited recipients. Report delivery can be scheduled or real-time trigger based and can be delivered via email, fax, FTP or web browser.
Email Response System	Monitor incoming email & website requests. Match email/web info with contact records in Sage apps. Update contacts with email details, schedule follow-ups, & create accounts, contacts, leads, & transactions based on content received.
Cross-Application Analysis & Response	Combine data from multiple Sage apps, analyze it jointly, and trigger integrated alerts. Use combined results to move data from one application to another or verify consistency of records across multiple Sage databases.

About Vineyardsoft

Headquartered on Martha's Vineyard, Massachusetts, Vineyardsoft is the developer of the Sage KnowledgeSync "Active Alerts" solution and is the leading developer of Business Activity Monitoring software. Vineyardsoft enables clients to analyze, identify and respond to critical, time-sensitive business data.

For more information on Vineyardsoft, call 800-850-8055, e-mail info@vineyardsoft.com, or visit Vineyardsoft's Web site at <http://www.vineyardsoft.com>.