



Frequently Asked Questions

What is Sage KnowledgeSync?

Sage KnowledgeSync is an Alerts and Workflow solution that works with all Sage ERP Accpac.

What does Sage KnowledgeSync do?

Sage KnowledgeSync allows an organization to keep on top of what's going on in their business. Sage KnowledgeSync identifies business conditions that are important to an organization—and triggers alerts; delivers forms and reports; and executes intelligent workflow. Customers can anticipate instead of reacting, and be better able to respond to potential problems (or even potential opportunities) because they know about them sooner—and can respond sooner.

Are there different editions of Sage KnowledgeSync Available?

Yes, there are two editions of Sage KnowledgeSync available: Sage KnowledgeSync Professional and Sage KnowledgeSync Enterprise edition.

Sage KnowledgeSync Professional edition enables organizations to monitor their business for conditions that warrant attention and action. The Professional Edition identifies these conditions and sends out alerts through electronic mail.

Sage KnowledgeSync Enterprise edition is designed for organizations that wish to expand upon the capabilities of the Sage KnowledgeSync Professional edition. The Enterprise edition includes all the capabilities of the Professional Edition, plus increased abilities in the areas of alert delivery methods, data condition monitoring, form/document/report delivery, and workflow processing.

The Enterprise edition also provides the ability to monitor data beyond just a single Sage application.

Why would a customer want to upgrade to the Enterprise edition?

The following chart shows the most common reasons why some clients choose to upgrade to the Enterprise edition.

Sage KnowledgeSync Professional Edition	Sage KnowledgeSync Enterprise Edition
Monitors a collection of preconfigured conditions	Monitors any conditions
Sends email alerts	Sends alerts by email, fax, pager, PDA, cell phone, FTP, and screen pop
Alerts can include some application data	Alerts can include any application data
Limited to 24 active events	Unlimited events
Sends email in plain text and HTML format	Delivers forms and documents with advanced formatting and in a variety of formats including PDF, Microsoft Word, and Microsoft Excel
Does not include Report Distribution module	Includes a Report Distribution module
Cannot add or update records in Sage applications	Includes a Workflow Action module
Monitors information in one Sage application	Monitors data within and between multiple/unlimited applications
Cannot monitor the content of incoming email	Monitors and autoproceses incoming mail messages
Delivers alerts and tracks success or failure of delivery	Delivers and tracks alerts and also includes Alert Failover so that undeliverable alerts can be rerouted
Runs each event as a separate entity	Provides event "job streams" for multi-step processes
Cannot import or export events	Can share events with other Sage KnowledgeSync users

What kinds of "business conditions" do clients use Sage KnowledgeSync to look out for?

Typically, they are things like:

- Running low on stock
- Not getting paid (overdue invoices)
- Jobs that are running behind schedule
- Leases or contracts that are about to expire
- Customers who have changed their buying habits—or have stopped buying altogether

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How are those “conditions” communicated to the right people?

Through any combination of:

- Email—Professional and Enterprise editions
- Fax—Enterprise editions
- Pager—Enterprise editions
- Cell Phone—Enterprise editions
- Screen Pop—Enterprise editions
- Dynamic Dashboard—Enterprise editions

How about the “alert” content itself?

In addition to simple “heads-up!” alerts, Sage KnowledgeSync Enterprise can deliver forms and documents, such as:

- Automatically email an invoice (for example, in PDF) to a customer when they place an order
- Automatically resend a statement to a client who has overdue payments
- Automatically fax a purchase order to a vendor when an item needs reordering

Can alerts include analytical reports?

Yes. Alerts using the Sage KnowledgeSync Enterprise can include analytical reports, such as:

- Automatically sending the A/R aging report to the CFO every Monday at 9 AM.
- Automatically sending the daily shipments report to shipping every day at 7 AM.
- Automatically generating a credit status report for a client if they exceed 95% of their credit limit; and sending that report to the client's account manager.

What type of “intelligent workflow” can Sage KnowledgeSync execute?

Examples of the intelligent workflow that can be executed through Sage KnowledgeSync Enterprise are:

- When a customer gets to within 5% of their credit limit, automatically put the client on credit hold within the Sage ERP Accpac database.
- When an inventory item drops below its reorder level, automatically create a purchase order in the Sage ERP Accpac database.

What version of Sage ERP Accpac does Sage KnowledgeSync work with?

Sage KnowledgeSync works with Sage ERP Accpac 5.5 and newer.