

## Sage MAS 90, 200 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.

### **Accounts Receivables Triggers:**

Accounts; Balance Forward > 'x'  
Accounts; Balance Over 120 Days > 'x'  
Accounts; Balance Over 30 Days > 'x'  
Accounts; Balance Over 60 Days > 'x'  
Accounts; Balance Over 90 Days > 'x'  
Accounts; Count of the Number of Accts Whose Over 120 Day Bal > 'y'  
Accounts; Count of the Number of Accts Whose Total Bal is > 'y'  
Accounts; Current Balance + Bal Forward + Open Orders is > Credit Limit  
Accounts; Current Balance + Bal Forward + Open Orders is > 'x'  
Accounts; Current Balance + Bal Forward > 'x' Percent of Credit Limit  
Accounts; Current Balance + Balance Forward > Credit Limit  
Accounts; Current Balance + Open Orders are > 'x'  
Accounts; Current Balance is > 'x'  
Accounts; Open Order Amount is Greater Than 'x'

### **Accounts Receivables Invoice Triggers:**

AR; Open Invoices; Commission Amount > 'x'  
AR; Open Invoices; Cost of Sales > Sales Amount  
AR; Open Invoices; Count of Invoices of > 'y' Dollars Per Customer  
AR; Open Invoices; Due In 'x' Days  
AR; Open Invoices; Due Today  
AR; Open Invoices; Overdue for Payment  
AR; Open Invoices; Overdue for Payment; Unpaid Balance > 'x'  
AR; Open Invoices; Total Due Per Customer  
AR; Open Invoices; Total Due Within 'y' Days  
AR; Open Invoices; Total Salesrep Commissions

### **Accounts Receivables Invoice Triggers (con't):**

AR; Open Invoices; Unpaid Balance > 'x'

### **Client Account Triggers:**

Accounts; Credit Limit is Changed  
Accounts; Credit Status Changed  
Accounts; No Activity Within 'x' Days  
Accounts; On Credit Hold  
Contacts; New  
Customers; All

### **Accounts Payables Invoice Triggers:**

AP; Open Invoices; Count of the Number of Unpaid Invoices Per Vendor  
AP; Open Invoices; Due In 'x' Days  
AP; Open Invoices; Due Today  
AP; Open Invoices; On Payment Hold  
AP; Open Invoices; Overdue for Payment  
AP; Open Invoices; Total Balance Due In 'x' Days  
AP; Open Invoices; Total Balance Overdue Per Vendor  
AP; Open Invoices; Total Balance Per Vendor  
AP; Open Invoices; Unpaid Balance > 'x'

### **Accounts Payables Vendor Triggers:**

Vendors; Balance Due is > 'x'  
Vendors; On Payment Hold

### **Inventory Stock Level Triggers:**

IC; Item Warehouse; > 'x' Units on Backorder  
IC; Item Warehouse; Item is At or Below Reorder Point  
IC; Item Warehouse; Negative Quantity On Hand  
IC; Item Warehouse; Qty Available < Qty Needed  
IC; Item Warehouse; Qty On Hand + On Order < Min Stock Level  
IC; Item Warehouse; Stock Surplus (On Hand > Max Qty)  
IC; Item Warehouse; Total Units On Hand (All Warehouses)

### **Inventory Item Master Triggers:**

IM; Items; Last Cost < Average Cost  
IM; Items; Last Cost > 'x' Percent Increase Over Avg Cost  
IM; Items; Not Sold Within the Last 'x' Days  
IM; Items; Primary Vendor is Changed  
IM; Items; Profit Margin is < 'x' Percent  
IM; Items; Profit Margin is > 'x' Percent  
IM; Items; Sale Ends Within the Next 'x' Days  
IM; Items; Sale Starts or Ends Today  
IM; Items; Sale Starts Within the Next 'x' Days  
IM; Items; Suggested Retail Price is Changed

### **Inventory Item Master Triggers (con't):**

IM; Items; Suggested Retail Price List  
IM; Sales Promotion; Starting Today

### **Purchase Order Line Item Triggers:**

PO; Line Items Required for Receipt Within 'x' Days  
PO; Line Items; Backordered  
PO; Line Items; Overdue by Required Date  
PO; Line Items; Received Percentage of Items < 'x'

### **Purchase Order Triggers:**

PO; Missing Payment Terms  
PO; On Hold  
PO; Status is Changed

### **Sales Order Triggers:**

SO; Daily Item Total (Units) > 'x'  
SO; Sales Orders Confirm To Contact is Changed  
SO; Sales Orders Deposit Amount is Changed  
SO; Sales Orders Discount Amount is Changed  
SO; Sales Orders Placed Today (Order Confirmation)  
SO; Sales Orders Ship Via is Changed  
SO; Sales Orders Terms are 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.