



Monitor

Alert

Report

Update

Integrates with:  
Sage CRM SalesLogix

**“It’s What You Don’t Know That Can Hurt You”™**

The software applications utilized in business today contain an abundance of information. Hidden in all the transactions is information that requires your attention. Expiring quotes. Overdue activities. Changes in the pipeline. Support activities behind schedule. And customers whose buying patterns have changed. Every minute that this information goes undetected – and unresponded to – costs your organization. Lost productivity, lost revenue, and lost customer loyalty.

Can your organization afford that?

### **KnowledgeSync -- Your Invisible Assistant**

Identifying and acting on important business information is what KnowledgeSync is all about. It is an automated system that lets you tell it what conditions to watch for, and how to respond to those conditions when they occur. Using advanced Data Mining capabilities, KnowledgeSync can identify the precise conditions that are critical to the success of your organization.

And unlike simple alerting solutions, KnowledgeSync’s “Active Alerts” technology lets you do far more than just send out an “email reminder”. Whether it’s generating invoices, work orders, or picking lists, whether it’s pushing critical information to a web portal, or whether it’s executing workflow to schedule intelligent follow-up activities, KnowledgeSync is an enterprise-level solution that brings corporate awareness to a whole new level.

### **Flexible, Intelligent Alerts**

Content, format, and delivery. These are the 3 keys to effective alert management. KnowledgeSync’s alert messages can contain as much – or as little -- information

### **Alerts (cont’d)**

as is required; individual messages may be casual or may appear as Forms or Documents. They may contain content from one application or from multiple applications. Supported message formats include HTML, PDF, Excel, and Word. Choose from executive-level summaries or detailed listings. And as for message delivery methods, KnowledgeSync includes:

- E-mail
- Pop-up message
- Fax
- Pager
- PDA
- Cellular phone
- Web Browser



### **Task-Specific Workflow**

Keeping your organization – and your customers -- informed often requires more than just alerts. Business applications such as Sage’s are critical to managing your data and to your organization’s success. Those applications let your staff track what they have done, and what they need to do. And that’s why KnowledgeSync combines Alerting with Workflow; so that KnowledgeSync can update your Sage applications with the details of not only what has happened – but what has to happen to keep your organization running smoothly.

And KnowledgeSync’s Alerting and Workflow are not limited to working just with Sage applications; you can integrate all of your business applications with KnowledgeSync, ensuring a true enterprise-wide solution.

## [Reporting – Standard & Exception](#)

Most of us get reports – and we spend far too much time wading through them to find the 5% that actually interests us. KnowledgeSync generates reports -- on any schedule you require – and delivers them to the people who need them, via email, fax, FTP, and web portal.

But KnowledgeSync's strength is in "Exception Reporting", the ability to generate reports only when certain business conditions warrant it. Whether it's a sales report only if revenues are above or below a certain level or customers who have had over "x" number of support calls in the last 30 days, KnowledgeSync's Exception Reporting allows you to spend less time finding the problem, and more time fixing it.

## [Cross Application Analysis & Response](#)

What happens when salespeople track their information in one application and financial people track their information in another? In a word, "dis-connects". The right hand doesn't know what the left hand is doing. A salesperson may work for days to close a deal, only to find out that it's been held up by someone in finance. Waste of time? You bet.

KnowledgeSync is the only application that performs cross-application analysis, alerts, and response. It doesn't matter what the applications are, who they're from, or what kind of databases they use. Cross-departmental and enterprise-wide business analysis and response is no longer a luxury; it's a necessity.



## [Incoming Email – Too Valuable to Ignore](#)

When you talk about monitoring business data, monitoring "most of it" just isn't good enough. Email is universal, and in and among the raft of spam that every organization receives daily is valuable, time-sensitive information from customers, from prospects, and from partners. KnowledgeSync's "Email Response System" ensures that this valuable data is identified, captured, and acted upon.

## [Monitoring Incoming Email \(cont'd\)](#)

KnowledgeSync can monitor an unlimited number of email accounts for incoming messages. These messages are scanned to see who they're from and if they're important. And then KnowledgeSync "matches" those messages with records in your Sage database to determine who needs to do what in response to them.



Whether it's to monitor questions emailed to your Support staff, or to follow up on sales inquiries logged into your website, KnowledgeSync lets your organization better manage your email traffic and take better advantage of every customer interaction.

## [The KnowledgeSync Wizard](#)

Most sophisticated Data Mining, Alerts, or Workflow solutions require a high level of technical expertise. In other words, "only programmers need apply". Not so with KnowledgeSync. Designed with the user in mind, KnowledgeSync provides a wizard-driven interface that lets customers easily configure their own events.

At the same time, KnowledgeSync includes optional Advanced Event Design features so that Technicians, Consultants, and similarly-skilled people can extend KnowledgeSync's native functionality to address sophisticated, site-specific requirements.

## [Ready-to-Use Events](#)

Although the KnowledgeSync Wizard lets you easily create your own events, KnowledgeSync comes pre-packaged with events for use with Sage CRM and Sage CRM SalesLogix, as well as packaged events for the other Sage Software applications. There is no charge for these EventPaks, and they give you the ability to get up-and-running with KnowledgeSync in just a couple of hours. Along with the free 30-day KnowledgeSync Trial License, you can get started with KnowledgeSync today.

Integrating with Applications Spanning all Industries and Regions:

Health | Non-Profit | Manufacturing | Distribution | Media | Financial | Utilities | Government  
CRM | HR | Accounting | ERP/MRP | Quoting | Document Management