KnowledgeSync™

Alerts & Automation for Your Business

KnowledgeSync combines alerts and automation to help companies monitor key activities. Through alerts and warnings, business leaders and staff can easily identify conditions that require attention, stock items that require reordering, and invoices that are overdue for payment.

Pay and Get Paid On Time

Managing your A/R and A/P data electronically is essential and monitoring it for issues is even more important. Whether it's emailing overdue invoices to clients, sending text messages to your mobile phone about an expiring discount, or putting a delinquent client on credit hold, KnowledgeSync identifies issues as they occur and automatically takes action to get your business back on track and running smoothly.

Monitor Inventory Activity

Inventory is endless, and even when you have the time to check a dozen different conditions, it's the one thing you didn't check that ends up hurting you. KnowledgeSync auto-monitors everything in the lifetime of an inventory item, from initial purchase to delivery, storage, and sale, and looks for:

- Stock shortages
- Backorders
- Too much or too little on-hand
- Purchase order delivery or approval delays
- Item sales that are hot one month and cold the next

Learn more: **www. knowledgesync.com**

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Help Your Reps Sell

Stay on top of sales and the campaigns they came from by monitoring activities and reporting on leads from prospect to customer. KnowledgeSync can warn you about and trigger actions for:

• New orders for clients that haven't paid their last bill
• Customers who have significantly changed their buying habits
• Delayed shipments
• Expiring quotes

Know When Something Didn't Happen

Sometimes the most valuable information you can get out of your system isn't about what *did* happen but what *didn't*. By the time someone utters those fateful words, "Whatever happened to . . . " it's almost always too late. KnowledgeSync inactivity monitoring keeps track of missed events such as:

• A customer who has stopped buying from you
• A stock item that hasn't sold in weeks
• A project that has had no activity in the current month

Alert on Errors and Exceptions

We all know that errors happen, and sometimes data is manipulated. You might not be able to stop these things from happening, but you can automate the process to both spot and respond to them. You identify the conditions and responses and stand guard 24/7 looking for issues, including:

• Duplicate item numbers
• Missing email addresses
• Exceptionally high discounts
• Unacceptably low-profit margins

Automate Form and Report Delivery (Reports Module)

KnowledgeSync also automates report generation and distribution not just on a schedule such as daily or weekly, but on an as-needed, data-triggered basis. Save 60–100 work hours every month by automatically generating and delivering reports on all the standard forms and documents you have, namely:

• Invoices
• Statements
• Shipment confirmations
• Purchase orders

Preconfigured and Custom Events

To help you get up-and-running with KnowledgeSync, the application includes EventPaks, a collection of pre-configured events for leading front-office and back-office solutions. You also get a wizard-based design engine to create additional events specific to your business needs.

You choose the conditions as well as the responses (alerts, reports, and workflow). Alerts may be delivered via email, text, IM, FTP, and the web. Reports include Microsoft® Crystal Reports and SSRS, and workflow can trigger updates in any database. Additional options include "home" versus "work" delivery, holiday handling, and "failover" alerts if the primary recipient is unavailable.

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