Professional Edition Features

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 via electronic mail.

Pre-Configured Business Condition Triggers (Queries)

The Professional Edition comes with an average of 45 pre-configured "business condition triggers" (queries) so you can identify and be alerted to a wide range of business events. These queries identify everything from overdue invoices to late deliveries, low stock conditions, et cetera. Although the Professional Edition does not let you modify these queries (or add new ones), it does let you specify your organization's specific thresholds (or "trigger points") such as dollar values, unit totals, date ranges, and so on.

Up to 24 Actively-Monitored Events; Unlimited Alerts & Unlimited Recipients

Sage KnowledgeSync Professional Edition enables you to actively check for any 24 business conditions that are important to your organization. You can enable or disable events as dictated by your business needs; there is no limit to the number of alerts that can be sent nor is there a limit to the number of people who can receive those alert messages.

Each event may also be configured for either "one-time" or "repeat" alerts. Thus you can have an event that sends only one alert when a condition is met (such as an event that sends an Order Confirmation when a new order is placed) and you can have an event that repeats its alert until its condition is addressed (such as an event that sends an alert about low stock levels – and continues to periodically send reminder alerts until those levels are replenished).

Customizable Email Alert Messages

The Professional Edition includes a flexible Alert Message Editor which allows you to design your email alerts to contain precisely the information that you require – and in the format that best suits your needs. You can:

~ Add or remove data elements from the alert message

~ Create the message in either plain text or HTML format

~ Format fields to control their length, their format (e.g., currency), and alignment

~ Create "header" and "footer" text plus "message details"

~ Dynamically populate the email "reply" address so that a reply to an alert sent by Sage KnowledgeSync goes back to the most appropriate person

Summarized Alerts ("Message Roll-Up")

When creating your email alerts, the Professional Edition gives you the option to create summarized alerts – i.e., single alert messages that contain the details from multiple records in your Sage application database. For example, you can:

~ Create a single alert message that shows all inventory items needing to be re-ordered

~ Create a single email that shows all customers who have receivables that are in excess of 90 days overdue

~ Create a separate email for each account manager – giving each manager a list of just their clients who have overdue payments

~ Create one alert message for each warehouse that lists those items that have fallen below their stock minimum

Flexible Alert Recipients ("Subscribers")

Each event that you activate in the Professional Edition can send email alerts to an unlimited number of recipients. This includes:

- Sending alerts to individuals as well as to groups of people (you have the ability to create and define individual recipients as well as recipient groups)

- Sending alerts to one or more people who are related to (or associated with) the record that is being "triggered" (e.g., sending an alert to the customer who just placed an order or sending an alert to an account manager whose client is behind in their payments)

- Tracking whether an alert was successfully delivered to the recipients

- Sending alerts to people within your organization as well as to external people such as clients, prospects, and business partners

- The ability to specify "off hours" – those days and times when a recipient should not receive alert messages

- You also have the ability to specify two email alert addresses per alert recipient (e.g., a primary address and a secondary address) so that regardless of the time of day or day of the week, Sage KnowledgeSync will be able to send the required information to the right person – and at the right address.

Unlimited Scheduling Options

Sage KnowledgeSync monitors your business data by periodically checking to see if certain business conditions exist within your Sage application. Those business conditions that are more mission-critical and time-sensitive can be checked on a more frequent basis, and those conditions that are less time-sensitive can be checked on a less-frequent basis.

And, although the Professional Edition comes pre-configured with

approximately a dozen schedule frequencies (such as daily at 9 AM, daily at 5 PM, every hour, every 10 minutes, every Monday at 10 AM, or the first of every month), you can create an unlimited number of custom schedules, based on the needs of your organization. This includes the ability to specify the "work days" and "work hours" for each schedule as well as the ability to define a "holiday calendar" and indicate whether or not a Sage KnowledgeSync event should send alerts on those holidays.

Comprehensive Alert Audit Trail

The Professional Edition includes a module called the Sage KnowledgeSync Monitor. This module provides you with a comprehensive audit trail that tracks the following:

- What events were checked, when they were checked, and whether their conditions were met

- What events were triggered, when they were triggered, and what records met the events' criteria

- What email alerts were delivered, what the content of the alert was, to whom the alert was delivered, at what time the alert was delivered, and whether the alert delivery was successful

- Whether Sage KnowledgeSync experienced any errors during its processing – such as might occur if it tried to deliver an alert to an invalid email address.

For each event, you can also display a list of currently "triggered" records (i.e., have met the event's criteria). The Professional Edition lets you "un-trigger" a record (in case an alert was missed or accidentally deleted by a recipient) and thus re-run an

event for that record and re-deliver the corresponding alert.

Built-In Email Engine

Sage KnowledgeSync Professional Edition ships with a built-in and fully-configured Email Engine, so you don't have to worry about integrating Sage KnowledgeSync with your own email system – and the various security, authorization, firewall, and other issues which may arise.

The built-in Email Engine uses an Internet (SMTP) email client and allows you to define its "Email Sending Address" so that you can customize your Alerts to come from an account that is specific to your organization. Additionally, the Professional Edition provides a one-click "Test Email" button which allows you to test the email delivery and ensure that it is compatible with your IT environment.

Professional Edition Licensing

There is no License Fee for Sage KnowledgeSync Professional Edition. However, you are required to pay a minimal annual Maintenance and Support (M&S) fee in order to receive your Professional Edition license. Each issued license is good for one year; at the end of that one year period you will be reminded to renew your Maintenance and Support policy.

As soon as you renew your M&S on the Sage KnowledgeSync Professional Edition, you will receive a new license code for the following twelve-month period.