# KnowledgeSync 2000: Business Benefits

## What Benefits Can KnowledgeSync Offer me?

KnowledgeSync provides your system with **four core capabilities**:

I. **Real-time Alert Messaging (via e-mail, fax, pager, PDA, cell phone, FTP, and web browser) based on critical, time-sensitive application data.**

- Send alerts based on data conditions within a single application (e.g., "alert the account manager to clients with pending sales opportunities who have not been contacted in over a week")

- Send alerts based on data conditions across multiple applications (e.g., "alert the sales manager to clients with pending sales opportunities in the CRM application who are on credit hold in a financial application)

- Send one-to-one marketing alerts (e.g., "alert existing clients in the financial industry who have purchased our Fixed Assets application that the new advanced depreciation module is now available for purchase")

- Send alerts about 'exception management' (e.g., "alert management to erroneous, missing, or inconsistent data entry, such as an invalid e-mail address or phone number, or missing notes about an upcoming appointment")

- Send alerts about client activities to business partners (e.g., "alert a business partner if a client is failing to correctly enter data into their newly purchased application, or if the client is using an application module that they have yet to receive training on")

- Trigger alerts that cause application updates (e.g., "if a client has not been contacted in 'x' number of days, automatically send out an alert, record the alert to the client's history (in the underlying CRM application), and dynamically schedule a follow-up call for that client (also in the CRM database)")

II. **Dynamic E-Mail Analysis, Response, and Processing.**

- Monitor any incoming e-mail messages for critical, time-sensitive content and auto-respond to the sender of the message (e.g., "when a support question is e-mailed in, automatically send a receipt confirmation and reply back to the sender")

**Dynamic E-Mail Analysis, Response, and Processing (con't)**

- Re-direct incoming e-mails based on the content of the incoming mail message (e.g., "automatically determine the person(s) who need to be informed about a message and re-direct it to them via e-mail, fax, pager, PDA, or web browser")

- Map information from an incoming mail message to the corresponding client record in an underlying database and automatically notify the appropriate person(s) (e.g., the account manager) responsible for the corresponding account.

- Automatically add (or update) the application that contains a client's record with the details of an incoming e-mail message (e.g., "if a client e-mails a technical question, automatically add it as a history record to that client's record in a CRM database")

- Automatically schedule activities within the application that contains a client's record based on the details of their incoming e-mail message (e.g., "if a client e-mails a message about a payment, automatically schedule a follow-up phone call for that client in a CRM database")

- Log outgoing e-mail messages within a client's record in an underlying application (e.g., "when an outgoing mail message is sent, automatically record the details of the message in the client's history within a CRM application")

III.    **Report Distribution for Crystal Reports via e-mail, fax, FTP, and web browser.**

- Automatically generate and distribute Crystal Reports on a periodic basis (e.g., "every Monday morning at 9:00 AM, generate and distribute the Sales Forecast Reports and Last Week's Service Statistics Reports")

- Dynamically generate and distribute Crystal Reports based on the occurrence of specific conditions within an application (e.g., "when more than 'x' training requests are logged into an application, automatically generate and distribute a Training Resource and Scheduling Availability Report")

- Enable a Crystal Report 'auto-request' system via e-mail (e.g., "a sender of a mail message requests information such as sales figures or scheduling availability and automatically receives a return e-mail with the corresponding reports attached to the message")

### IV. Monitor Operating Environment Events.

- Check for low disk space or memory errors (e.g., "if any disks have less than 200 MB of free space, send an alert")

- Check for tasks or programs that are (or are not) running (e.g., "if SQLServer is not running, send a message to the IT department")

- Check for files that are present or absent (e.g., if an order processing transaction file has not been received, notify the accounting department)

- Check for new (or updated) files that need to be distributed (e.g., if any sales or marketing literature has been updated, automatically distribute it to employees, business partners, and clients)

- Check the contents of the NT event log for security breaches or other conditions

### About Vineyardsoft Corporation

Vineyardsoft Corporation is headquartered on Martha's Vineyard, MA, and is the leading developer of unified e-business alert messaging software. Founded by James R. Murphy, a pioneer in the development of customer relationship management software, Vineyardsoft enables clients to analyze, identify, and distribute critical, time-sensitive business data to employees, business partners, and customers. Vineyardsoft's mission is to empower clients to respond more quickly, intelligently, and profitably to changes in an organization's business where timing is critical to success, and where information needs to be delivered via e-mail, fax, pager, PDA, cell phone, and the web.

For more information call CABC on 01635 570970

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# KnowledgeSync for Maximizer:
# Version Functionality

I.  Version: "**KnowledgeSync Lite for Maximizer"**   This includes the following functionality:

- The ability to activate up to six (6) KnowledgeSync events. By default, KnowledgeSync includes a Maximizer Enterprise EventPak which has approximately 30 pre-defined queries and events. A client has the ability to use any six of these as well as the ability to modify these events (and their queries) and/or to create additional queries or events themselves. However, a client would not be able to activate more than six events.

- The ability to send our e-mail alert messages to an unlimited number of recipients.

- The ability to run these events on any periodic schedule, from every minute to every 'x' hours or days, or on set days of the week.

- The ability to modify the e-mail alert messages, including the addition or deletion of database fields, the customizing of the message's default text, and the formatting of the fields in the message.

- The ability to add or remove subscribers (alert recipients) for each event.

- The ability to export triggered event data to a flat file (for exporting, reporting purposes, or later transmission to specific recipients).

- The ability to execute SQL insert, update, or delete statements (to add, update, or delete records in any database) when an event is triggered (with the ability to use the triggered event data in the SQL statement)

- The ability to execute stored procedures (to add, update, or delete records in any database) when an event is triggered (with the ability to use the triggered event data in the procedure)

- The ability to run executable programs (*.exe's) (to add, update, or delete records in any database) when an event is triggered (with the ability to pass the triggered event data into the executable program)

- The ability to run any of the six events on an ad-hoc basis.

- The ability to run the KnowledgeSync Event Monitor to track the status of checked and triggered events, including the ability to drill down to monitor the content of and delivery status of triggered e-mail messages.

- The ability to define organization-specific holidays and specify whether or not an event should be checked on a holiday

- The ability to define two (2) e-mail addresses per alert recipient, so that a recipient can have different delivery addresses based on the time of day and day of the week.

- The ability to configure KnowledgeSync so that it can send e-mail alerts to the "owner" of a database record (such as to the sales rep responsible for a specific client account)

- The ability to define and send alerts to groups of alert recipients

- The ability to configure an outgoing e-mail message so that any response to that message goes back to the "owner" of that record

- The ability to configure KnowledgeSync to send out e-mail alerts from any system that uses either a Microsoft Exchange, Lotus Notes, or SMTP compliant e-mail system

- The ability to configure an event to send just one alert message for a triggered condition, or to send repeated alert messages for as long as the condition continues to exist.

- The ability to configure an event's e-mail message so that it sends: 1) one alert message per triggered record, or, 2) one alert message per group of triggered records, or, 3) one alert message for all triggered records.

**KnowledgeSync Lite does not include the following functionality:**

- Sending alerts via Fax

- Sending alerts via Pager

- Posting alert data and reports to a web browser

- FTP'ing for the delivery of reports and/or files

- The ability to trigger the generation and distribution of Crystal reports based on database thresholds

- The ability to generate and distribute Crystal reports based on a re-occurring schedule

- The ability to trigger an event based on a change made to a database field

- The ability to execute Visual Basic Scripts (to add or update database records) as the result of a triggered event

- The ability to configure an event to use multiple queries and thus monitor very sophisticated database conditions

- The ability to format e-mail alert messages in HTML

- The ability to make one event dependent on one or more other events

- The ability to have one event "call" one or more other events

- The ability to retrieve subscriber data from databases other than Maximizer Enterprise

- The ability to embed Crystal report content in the body of an e-mail message

II.  Version:  "**KnowledgeSync Full-Function for Maximizer"**:

Also referred to as **Basic Workflow Automation**

This includes all of the "included" functionality from KnowledgeSync Lite, plus all of the "excluded" functionality from the KnowledgeSync Lite version. The functions that are included in this version are identical to what is included in a standard "KnowledgeSync One Connection" license. This version is restricted to monitoring data within the Maximizer Enterprise database only; customers may not alter this connection to monitor any other data sources or products.

As far as licensing is concerned, each unique ODBC source counts as a "connection". With the Maximizer one-connection license, a client could use any ODBC driver they wish to connect to the underlying Maximizer DB. And, if you wished to use both a Maximizer  ODBC source and a SQLServer ODBC source (pointing at the Maximizer DB), that would count as two connections, even though both were pointing at the same database.

III.  Version:  "**KnowledgeSync Full-Function for Maximizer with ERS (E-Mail Response System)"**:

Also referred to as **Corporate Workflow Automation**

This includes all of the functionality present in the KnowledgeSync Full Function for Maximizer version as well as a second connection license that gives customers the ability to utilize the Software to monitor and process incoming e-mail messages. This version is restricted to monitoring data within the Maximizer Enterprise database and within incoming e-mail messages only; customers may not alter these connections to monitor any other data sources or products.

The license is "hard-coded" so that the only two sources that can be pointed to are a Maximizer database and incoming e-mail. If a client wished to monitor the Maximizer database and (for instance) another SQLServer database, the client would need to purchase the one-connection "Maximizer Full-Function" license, plus a one-connection "Upgrade" license.

## Pre-programmed Events in the Maximizer Event Pack

The following events are incorporated in the standard Maximizer Event Packs.

Depending on the licence purchased, the user or CABC can implement similar additional events as required.

- Appointments; Completed; Fewer Than 5 Per Sales Rep Last Week
- Appointments; Completed; More than 10 Per Sales Rep Last Week
- Appointments; InComplete; High Priority for Last Week
- Appointments; InComplete; More Than 10 Per Sales Rep Next Week
- Addresses; Mailing Adrs with Blank Country Codes
- Companies; Annual Sales < 500,000
- Contacts; Blank E-Mail Addresses
- Contacts; Fewer Than 20 from Cold Calls
- Contacts; Fewer Than 250 Leads from a Trade Show
- Contacts; More Than 500 from an Advertisement
- Hotlist Items; Completed for Yesterday
- Hotlist Items; Completed for Last Week
- Hotlist Items; Orders Confirmed Today
- Hotlist Items; Confirmed Payment Today
- Hotlist Items; Fewer Than 25 Completed Per Salesperson
- Hotlist Items; Completed Yesterday for Henderson Chemical Svcs
- Hotlist Items; Completed Last Week by "Master"
- Hotlist Items; Fewer Than 20 for Next Week per Slspsn
- Hotlist; Follow-up on Shipments This Week
- Hotlist; More Than 25 InComplete Per Slsperson This Week
- Hotlist; Payment Requests Due Today
- Hotlist; Promo Materials Due to be Sent This Week
- Companies; Average Annual Sales
- Appointments; Staff Personal; This Week
- Companies; Blank Annual Sales
- Appointments; With Customers in Credit Default
- Opportunities; Avg Price; In Progress < 5,000 Due This Month; Software Industry
- Opportunities; Count; Last Week; > 10 Abandoned due to Lack of Functionality
- Opportunities; Cumulative; Last Month; > 100k Won Per State
- Opportunities; Details; > 10,000 Lost to "My Competitor" Today

# Maximizer Knowledgsync Prices

Correct at 1 Aug 2004 – All Prices subject to change without notice – please confirm pricing

| | |
|---|---|
| Lite Workflow Automation Server Powered by Knowledgesync (Included with most Maximizer Enterprise LAN systems) | £500 |
| | |
| Basic Workflow Automation Server Powered by Knowledgesync | £1,350 |
| Corporate Workflow Automation Server Powered by Knowledgesync | £1,660 |
| | |
| Workflow Automation Server DB Connection Upgrade | £1,000 |
| Server Name Change | £350 |
| | |
| Vinyardsoft Software Support **(Manditory in Year 1)** | ☎ |
| | |
| Knowledgesync Automation server Installation & Commissioning | £850 |
| | |
| Event Development – Per event | ☎ |
| | |

All prices exclude VAT

**Please Note:**

**1) Total purchase price is license price plus Support/Maintenance price.**

**2) Maintenance contract entitles client to free software enhancements and escallation technical support.**

**3) The purchase of an annual Support/Maintenance contract is mandatory at time of purchase; renewal of contract is optional in successive years.**

**4) A "Server Name Change" is when a client needs to change the name of the server on which KnowledgeSync is installed and thus requires a new license code.**

**5) Prices for full Vinyardsoft product versions are different to those offered for the Maximizer special versions described above. Details for example, for unlimited connections on request.**

**6) You must additionally buy Crystal Reports if you want use Crystal Reporting with Knowledgesync.**

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# KnowledgeSync
# Technical Specifications

I.  Minimum System Requirements (One Connection License):

- Platform:  MS Windows 95, 98, NT, 2000, 2003, and XP
- Memory:  128MB
- Processor:  Pentium 290 (or greater)
- Disk Space:  (For installation) 64 MB
- Disk Space:  (For the application) 32 MB
- Disk Space:  (Per event) 5kb maximum (this includes event, query, subscribers, and all message texts)

Minimum & Suggested System Requirements (Two & Unlimited Connections)

|  | Minimum<br>2 connection | Recommended<br>2 Connection | Minimum<br>Unlimited | Recommended<br>Unlimited |
|---|---|---|---|---|
| CPU | 1.0ghz/1 | 1.2ghz/1 | 1.2ghz/1 | 1.8ghz/2 |
| RAM | 256mb | 512mb | 512mb | 1gb |
| HD | 20GB | 30GB | 30GB | 50GB |
| OS | ----------------------- | NT/XP/2000/2003 | ------------------------------------ | |

II.  Application Compatibility.  **KnowledgeSync must not be installed on an organization's Exchange Server.** Additionally, please contact Vineyardsoft Support if the KnowledgeSync server is running either of the following two programs:

- IBM Director
- IBM SMS (a hardware/software monitoring program)

III.  KnowledgeSync Programming Languages:

- C++, Visual Basic
- Microsoft COM (for SDK), Visual Basic  (for APIs)

IV. Frequency of Major Releases & Software Maintenance Program:

- Major Releases:  Typically Two times per year