

Sage Alerts & Workflow

Pre-Configured Events for Sage CRM

Sage CRM Alerts & Workflow 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 Alerts & Workflow to monitor for.

Users of Alerts & Workflow 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 Alerts & Workflow application.

Marketing Campaign Triggers:

Campaigns; Budget is Changed
Campaigns; Due to End Today
Campaigns; Due to Start or End Today
Campaigns; Status is Changed
Campaigns; Updated Today

Support (Case) Triggers:

Cases; Count; More Than 'x' for Any Prob Type Logged Over Timeframe
Cases; Count; More Than 'x' for Prob Type 'y' Logged Over Timeframe
Cases; Count; More Than 'x' High Priority Open
Cases; New, High Priority
Cases; New, High Priority
Cases; Open; High Priority; In "Waiting" State
Cases; Open; Priority Changed to "High"

Lead Triggers (con't):

Leads; Distribution by Region
Leads; High Priority; Awaiting Reply from Client
Leads; Hot; Received Today
Leads; Open and Unassigned

(Sales) Opportunity Triggers:

Opportunities; Count; Fewer Than 'x' Open Per Salesrep
Opportunities; Count; More Than 'x' Open Per Salesrep
Opportunities; Created Today
Opportunities; Due to Close Within 'x' Days
Opportunities; Due to Close; Weighted Value > 'x'
Opportunities; Forecast Amt, Probability, or Close Date is Changed
Opportunities; Open; Salesrep Average; Is Less Than 'x' Dollars
Opportunities; Overdue for Closing
Opportunities; Stage Changes
Opportunities; Total; Less Than 'x' Dollars Open Per Salesrep
Opportunities; Total; More Than 'x' Dollars Open Per Salesrep

Other Triggers:

Contacts; Missing E-Mail Addresses
Currency; Exchange Rate Has Changed
Currency; New Exchange Rate Has Been Added
Library Documents; Created/Updated Today
Products; List Price Has 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 Alerts & Workflow queries.

If additional assistance is required in the creation of Alerts & Workflow queries (triggers) or events, please contact your Sage Business Partner.