Reports Module Benefits

The "Reports" module in KnowledgeSync provides the following benefits:

1) **"Scheduled" reports & scheduled charts**. Every company has "scheduled analytics" – that's a fancy way of saying "reports that are run on a recurring schedule." Those reports may be things like an "A/R Aging Report", a "Stock Re-Order Report", or a "Check Reconciliation Report". These reports may also be graphic representations of business activities, such as a "Sales Trend Analysis Line Chart", or an "Overdue Balance Per Salesrep Bar Chart".

Many companies rely on one or more of their staff members to manually run and distribute these reports. And this is often no quick or simple job; the same report often has to be run multiple times (e.g., for each salesrep), output in different formats (PDF, HTML, Excel), and delivered via different methods (email, fax, FTP, web dashboard, or mobile device). Many hours of staff time each month or week can be devoted to this task.

Crystal themselves sell a "Report Distribution" module; it starts at $10,000.

KnowledgeSync provides the above functionality for just $999. But "scheduled" report distribution is not the only benefit of the "Reports" module.

2) **"Triggered" reports & triggered charts**. Too often, by the time "scheduled" reports & charts are generated and delivered, the information within them is out-of-date and the negative impact on business has already occurred. Very often, the delay of a few days, a single day, or even a few hours can spell the difference between preventing a crisis and responding to it. KnowledgeSync delivers meaningful reports WHEN the business conditions warrant it – and not hours or days later.

Beyond that, if you look at most staffers' desks, there's almost always a "pile of reports" sitting somewhere, waiting for the staffer to wade through them, looking for critical customer or business activities (or lack of activities). These piles of reports are essentially "haystacks of information" – and it's up to the staffer to look through all of those haystacks looking for the occasional "needle" of key information.

Instead of delivering these haystacks of information, KnowledgeSync specifically **looks for** critical customer or business activities and then – when and if it finds them – KnowledgeSync generates the corresponding analyses (reports, graphs, or charts) just on the specific activities that meet an organization's criteria. In short, instead of delivering "haystacks of information", KnowledgeSync delivers only the "needles" of key business activities that an organization needs to know about.

3) **Automated form & document delivery**. Businesses use a LOT of standard forms & documents – invoices, statements, quotes, picking lists, and purchase orders to name just a few. But how does a business get those forms generated and delivered to the people who need them – their customers, their prospects, their suppliers, and even their own staff?

In most cases, those forms are generated manually – by manually, we mean by one or more staff members who have to go into their ERP application, manually select what form they want, what customer, partner, or order they want it generated for, and then what address they want it sent to. Consider the number of invoices that need to be generated each month – and then add to it the number of statements, picking lists, purchase orders, and so on – and then add again the number of invoices and statements that have to be re-generated for overdue customers . . . and you have a lot of time spent every month on form & document generation and delivery.

KnowledgeSync automates the production and delivery of all of these forms and documents. A new sales order is placed; KnowledgeSync automatically generates the corresponding invoice in PDF format, auto-emails it to the customer, and sends a copy to the customer's account manager. An inventory item approaches its re-order level; KnowledgeSync auto-generates a purchase order and sends it to the appropriate vendor. A customer becomes past due, KnowledgeSync auto-sends the customer copies of their overdue invoices and a copy of their overall statement.

The sheer number of hours of manual staff labor generating and delivering an organization's standard forms and documents typically pays off a client's entire investment in KnowledgeSync in less than 6 months.