



## A Platform for Intelligent Data Integration

Disparate software solutions. Each with their own rules, their own processes, and – most often – blissfully ignorant of each other. KnowledgeSync removes that ignorance and enables “intelligent integration” across your business.

### One Solution for All Your Applications

KnowledgeSync is the glue that can hold your applications together while enabling them to speak with each other, share their data, and – most critically – share that information with you. Supporting all standard commercial databases such as SQL Server, Providex, Oracle, Access, and beyond, KnowledgeSync is your platform for data integration.



### Enterprise-Wide Data Integrity

No business operates on just a single software application. And with multiple applications – ERP, CRM, et cetera – comes multiple data sets, and inconsistencies between those sets can spell trouble and time-loss for an organization.

KnowledgeSync enables a system of enterprise-wide data integrity where such issues as “why is this client’s address different?” or “how come that order never got entered over here?” go away. Automatically and periodically, KnowledgeSync scans for data integrity issues, reports them to the appropriate people and, if desired, corrects them.

### Cross-Application Trigger Points

Have you ever had a salesperson place another order for a client who had overdue invoices? How about a field technician who erroneously provided service to a client because they weren’t aware that the client’s service contract was expired?

Most business applications can tell you what’s happening within their own data set, but only KnowledgeSync can tell you when a critical business condition occurs between multiple disparate software systems. Whether it’s to send an alert, generate a report or trigger an update, KnowledgeSync lets nothing fall between the cracks.

### Integrated Content & Alerts

The most common reason why “data integration” is requested is so that organizations can perform sophisticated analyses on that data and receive consolidated results. But what if that analysis – and the results – could be generated without having to physically move the corresponding data?

That’s one of the enterprise-wide benefits of KnowledgeSync. It can simultaneously retrieve and analyze data from multiple sources (such as from ERP & CRM solutions), compile that data into the most appropriate format (e.g., PDF, chart, graph, email, web dashboard), and then deliver that integrated content to the exact people who need it.

## Triggered Integration

The vast majority of data integration occurs as part of a “batch process” – a job that is scheduled to run, usually at the end of the day or during the night.

But sometimes integration can't wait – it needs to happen when something else has occurred – whether it's a new order in ERP that needs to be added to CRM, or a new client in CRM that needs to be added to ERP.

With KnowledgeSync, you have complete control over when integration activity happens. A new record. A changed record. A changed field, such as a change to a customer's credit status. Or even when something doesn't happen, such as a triggered creation of a phone call in CRM for a client who has stopped buying in ERP.

## Scheduled Data Updates

When it's large-scale data that needs to be handled – or simply integration tasks that you want the assurance of running at a certain time on specific days, KnowledgeSync gives you the freedom of “scheduled integrations”.

Scheduled integrations go beyond Windows Scheduler abilities. In KnowledgeSync you control such items as scheduled days of the week, hours of the day, and even whether a schedule will run on holidays. And integration “dependencies” are also supported, allowing you to ensure that certain data updates don't get initiated until other steps are completed.

## Integrated Email Data

When considering an organization's integration needs, the conversation cannot begin and end with moving data between various business software solutions such as ERP and CRM. There is one other great source of business data that must be included in all considerations of integration: incoming email.

All businesses wrestle with how to integrate incoming email – whether it's messages sent to generic accounts such as info@your\_organization.com, or emails sent to specific departments, such as to an organization's customer support team.

KnowledgeSync includes the ability to monitor, process, and integrate incoming email messages, including matching incoming messages with records in underlying databases, adding the contents of incoming mail to a customer's record, and scheduling intelligent follow-up activities.

## Integration Failover & Audit Trails

Integration is too critical a task to be left unwatched. KnowledgeSync monitors the status of all integration “events” and tracks their performance and completion status.

This includes not only tracking when each event occurred and its corresponding success or failure, but also all related activities, such as delivered alerts and generated reports. And, KnowledgeSync includes “event failover”, allowing you to automate the response action if and when any integration event fails to complete successfully.

KnowledgeSync: Sample Uses	
<input checked="" type="checkbox"/>	Equipment is Inactivated
<input checked="" type="checkbox"/>	Incomplete Tasks
<input checked="" type="checkbox"/>	Job Cost Exceeds ‘x’
<input checked="" type="checkbox"/>	Job Cost Variance > ‘x’ Percent
<input checked="" type="checkbox"/>	Job Has Been Closed
<input checked="" type="checkbox"/>	Job Ready to Invoice
<input checked="" type="checkbox"/>	Job Status Changed to ‘x’
<input checked="" type="checkbox"/>	Job; No Follow-Up in ‘x’ Days
<input checked="" type="checkbox"/>	No Equipment Service in Over ‘x’ Days
<input checked="" type="checkbox"/>	Notation Follow-Up Due
<input checked="" type="checkbox"/>	Overdue Tasks
<input checked="" type="checkbox"/>	Tasks Due in ‘x’ Days
<input checked="" type="checkbox"/>	Tasks With No Follow-Up
<input checked="" type="checkbox"/>	SLAs in Danger of Being Missed
<input checked="" type="checkbox"/>	Upcoming Site Agreement Review
<input checked="" type="checkbox"/>	Warranty About to Expire