



SYNERGYEXPERT.COM

Products and Services

EventPaks

- * Preconfigured Business Processes
- * Quick Implementation

Workspaces and Reports

- * Custom
- * Pre-Configured Solutions

Tools

- * Developed Add-Ons to Enhance Synergy Functionality

Manuals

- * Train Users on Specific Synergy Functions

Training

- * Several Methods for Users and Managers to get the most of their Synergy Investment

Customization

- * When your Business has needs just outside the scope of Synergy and the tools and plug-ins don't answer your need.

HAVING THE RIGHT TOOLS

= IMPORTANT

HOW TO BEST USE THEM

= PRICELESS

CONTACT US FOR TRAINING

Rules Engine

Application:

The Rules Engine gives you the option to define rules in Synergy and based on the rules different type of messages can be given or actions can be triggered.

The different types of messages that can be shown to the user are:

- Error message, when the rule is executed and the rule result is positive the user will be shown an error message on the specified application and the user will not be able to continue.
- Warning message, when the rule is executed and the rule result is positive the user will be shown a popup when where the options 'continue' and 'cancel' are available. When choosing 'continue' the data will be saved. When choosing 'cancel' the data will not be saved and the user can change the input.
- Access denied, when the rule is executed and the rule result is positive the user will be shown a message access denied and the data can't be viewed.
- Note, when the rule is executed and the rule result is positive the user will be shown a popup when the application is opened. This could be a message to inform the user to take a certain action.

The different types of actions that can be triggered are:

- Action: Create, when the rule is executed and the rule result is positive it will allow creating data. For example based on a completion of a request, an item can be created. Another example would be to create additional workflow/request tasks based on the rule, this will allow for adding additional persons to the workflow so they also can take action on the workflow.
- Action: Update, when the rule is executed and the rule result is positive it will allow updating data.
- Action: Delete, when the rule is executed and the rule result is positive it will allow removing data.
- Scripting, this will give you the option to add javascript to the standard pages.

Manage the input of information into Synergy more efficiently, through the use of Business Rules to make fields required when other fields have a certain value.

The use of this tool makes sure that Rules are reacted upon immediately, rather than after the fact, requiring further entry into cards or requests.

Contact us to schedule a live demonstration today.



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ADDITIONAL INFORMATION OR SPECIFICATIONS:

- **30 minutes of training** / installation assistance **included** with this tool. Additional time may be provided (Billable) to acquaint users with advanced functions.
- **Manual included** will provide guidance for the self-install process and training of staff with this new functionality.
- **Delivery** of this tool will take approximately **7 business days**.

Requirement for Install and Use

This tool requires the addition of the Exact Role – “Enabling Add-On Solutions” for any Resource that is Viewing, Editing or a Participant in a Workflow Request that will be using this functionality. This Role is available at a small cost from Exact Software, and is licensed by individual users. This Role is required for many of our tools and custom applications described on this website.

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