



Tools

- ⇒ Preconfigured Business Processes
- ⇒ Developed Add-Ons to Enhance Synergy

Manuals

- ⇒ Training Guides for Users
- ⇒ Product Knowledge

Customization

- ⇒ Synergy and Tools do not address your requirements

Training

- ⇒ On-site
- ⇒ Remote Training

Workspaces / Reports

- ⇒ Development

HAVING THE RIGHT TOOLS

= **IMPORTANT**

HOW TO BEST USE THEM

= **PRICELESS**

[CONTACT US FOR TRAINING](#)

Sales Opportunities

Application:

Take a step backwards in your development process before you begin creating your first Synergy Enterprise sales opportunity.

Reading this manual and clearly defining what you are trying to accomplish for your organization. Creating a Sales Opportunity Process" is not a clearly defined process that can be repeated in the same manner each time for every customer.

It is a very fluid process, which requires creativity and a commitment of trial & error with patience while creating the statuses and corresponding requests to reach your desired results.

This document will provide you with a guide to follow to assist you with this process.

It is assumed that the creator of new processes, such as the use of Sales Opportunities will have an understanding of Synergy Enterprise, including data tables, roles, request fields and security levels.

Features:

Manual to assist in building effective sales opportunities.

- > What is a Sales Opportunity in Synergy
- > Sales Cycles
- > Opportunity Card
- > Reporting and Analysis
- > Opportunity fields

Contact us to schedule a live demonstration today.

SYNERGYEXPERT.COM

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ADDITIONAL INFORMATION OR SPECIFICATIONS:

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