

Examples of Synergy in an Organization

SYNERGYEXPERT.COM

Powered by The Donas Group, Inc.

(866) 227-0221
www.synergyexpert.com

Table of Contents

- Table of Contents 3
- Introduction 6
- Human Resources 7
 - How Do We Store and Manage Data Related to an Employee?..... 7
 - How Do We Store and Manage Data Related to an Employee, Which is Required to be Current? 10
 - How Do We Provide Current Versions of HR Documents to Employees? 12
 - How Do We Automate the Process of Employees Requesting Vacation Days? 14
 - How Do We Manage Employees Sick Day Reporting? 17
 - How Can We Automate the Process of Hiring New Employees? 20
 - How Do We Track Assets Being Provided to Our Employees?..... 24
 - How Can We Track an Employee’s Activities? 25
 - How Do We Make Sure All New Employees Receive a Proper Orientation? 26
 - How Can We Track Skills and Certifications of Employees? 28
 - How Can We Track Training Classes Completed by Employees?..... 29
 - How Can We Track Training Requests for Employees?..... 31
 - How Can We Track Employee’s Accidents?..... 35
 - How Can We Test an Employee or Account within Synergy Enterprise? 37
 - How Can We Tell If Our Employees are Using Synergy? 38
- Account Management 40
 - What Activities are Occurring with an Account? 40
 - How Do We Track Correspondence from Accounts?..... 45
 - How Do We Store and Manage Data Related to an Account? 50
 - How Do We Store and Track Tax Exemption Certificates Related to an Account? 52
- Marketing / Sales 53
 - What Has a Customer Done in Sales with Our Organization? 53
 - How Do We Track Sales Opportunities Presented for Customers and Prospects?..... 59
 - How Can Our Sales Staff Identify and Manage Our Customer’s Contacts Effectively? 62
 - How Do We Create Quotes From Synergy into Our Back Office Software? 64
 - How can we track information requests received from accounts within Synergy. 69
- Customer Service 71
 - How Do We Track and Resolve our Customers Issues? 71
 - How Do We Track and Try to Resolve our Customers Complaints? 73
 - How Do We Know if We Have Outstanding Information Requests from Accounts?..... 75

How Do We Support Our Customers?	76
How Do We Handle Specific Type Informational Requests from Accounts / End-Users? ..	78
Can a Phone System be interfaced with Synergy to Extract Statistics for our Call Center? ..	80
Can We Interface a Phone System with Synergy to Display the Caller?	81
Accounting.....	82
How Do We Provide Accounting Data from Synergy to Selected Managers?	82
How Do We Identify Items or Bill of Materials without Any Associated Costs?	85
How Can Use Synergy to Track Collection Calls to Accounts?.....	86
How can we Automate the Process of gathering W-9s from our Vendors?	88
Inventory Management	89
Can Inventory Items be Displayed in Synergy?.....	89
Can Sales Statistics on Items be Displayed in Synergy?.....	91
Can Sales Orders or Purchase Orders for Items be Shown in Synergy?	93
Can Synergy be used to help track Shipments within Containers from Overseas Suppliers?	94
Purchasing	95
How Does an Employee Request an Item to be Purchased?	95
Production.....	96
How Do We Review Production Orders from Macola Back Office software?	96
How Do We Review Shop Floor Orders from Macola Back Office software?.....	101
How Do We Create Non Conformance Requests and Track Dispositions?.....	105
How Do We Create Corrective Action Requests and Track these Actions?	106
How Do We Create Corrective Action Requests on Vendors and Track these Actions? ...	107
ISO / Quality Management.....	108
How Do We Create, Store and Have Readily Accessible ISO Documentation, such as Manuals?.....	108
How Do We Test and Document Formula or Product Tests?	109
How Do We Plan and Document Maintenance Such as Calibrations on Machines or Other Items?.....	110
How Do We Create and Document Non Conformance Activities?.....	111
Preventive Maintenance	113
How Do We Track Maintenance Scheduled for Machines in our Manufacturing Facility?	113
Document Management	116
How do we track Questions and answers (to be used as a FAQ or Knowledge Base) in Synergy?	116
How do we track a Document through an Approval Process?	117

How do we Store and Access Engineering Documents?.....	118
Can We Store Multiple Versions of a Document?.....	119
Project Management.....	120
Is there a way within Synergy to track the effectiveness of Marketing Campaigns?	120
Is there a way within Synergy to track Projects?	121
Is there a way within Synergy to track Implementation Projects for Internal or External Use?	122
Is there a way within Synergy to track New Product Development Projects?	123
Research & Development.....	124
How Do We Track Requests from Customers for Product Improvement?	124
Quality Control Testing.....	125
How Do We Manage the Documents Required in Quality Control Testing?	125
How Do We Track Data Required for Compliance Conformity?.....	126
IT Support.....	127
How Do We Support Our Employees?	127
Field Support	128
How Do We Know What Types of Machines Our Customers or Prospects Own / Use?...	128
How Do We Create and Track Support Calls for Customers?	130
How Do We Create and Track Service Calls for Customers?.....	131
Portals (Customer / Vendor / Reseller)	132
How Do We Provide 24 / 7 Access to Others?.....	132
How can we gather Seminar Registrations from Customers wishing to attend a face to face seminar or attend a company conducted webinar?.....	133