

Use Synergy More Effectively in your Business with our Tools, Manuals and Tips



Full Text Indexing of Documents / Requests / Attachments in Synergy

With the Synergy Enterprise search engine, it is possible to search on the content of these entities:

- Documents
- Workflow Requests
- Attachments



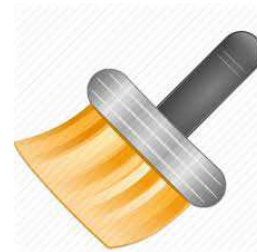
The Fulltext index will be populated with a background job "Exact.Process.exe". If you are not using this search functionality, you are making it more difficult for your Resources to search within the Synergy application.

This background job requires some parameters to be set up. I have included a document link for one of Exact's documents on this topic.

[Download Here](#)

Formatting Comments in Cards

This question was asked of me this week. How do I make Remarks in Synergy Cards more visible? I have some Important Information that I wish to share with other Resources when they Access the Card, and I want to make it Very Visible.



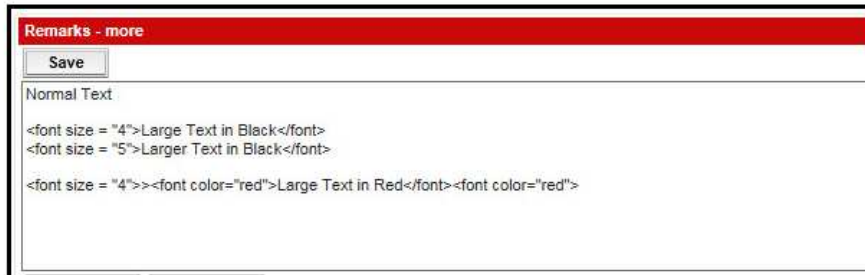
The Remarks field in Synergy Enterprise cards (Accounts, Contacts, Items, Projects, Opportunities and Resources) can be made more visible to Resources through the use of HTML-tags.

You may find it very valuable to highlight Key Accounts or Data that everyone viewing this field (card) needs to be made aware of.

Use these examples to make your Data More Visible to Your Resources.



Code
Examples:



Document Type Groups

Documents Type Groups are used in Synergy Enterprise to consolidate and make it simpler to find individual Document Types. As a Best Practice, many organizations create Document Groups by Business Functions.



As an example, you may have documents in Groups such as:

- Financial
- Account Management
- Quality
- Human Resources
- Item Management
- Procedures

Once a Document Group has been created, it is possible to edit the label, so changes may be made as your business evolves. Document Types may also be moved from one Group to Another Group.

Under each Document Group, you may have unlimited Document Types. Again it is important to minimize the number of them, in order to allow Resources to properly place new documents into Synergy. As an example, under Item Management, you may have Document Types such as:

- Fact Sheets
- Competition
- Manuals
- FAQ's

As another Best Practice, keep the number of Document Groups and Document Types small as you begin your implementation process. You may always add more as needed.

A SQL Script is available from our organization that will allow you to hide the standard Synergy "Out-of-the-Box" Document Types. Contact me if you need this script to minimize the number of unused Types displayed in the lists.

Project Management Card Views - New GLM Tool

Many organizations utilize the Projects Module within Synergy to track entities such as:

- New Product Development
- Marketing Campaigns
- Trade Shows
- Quality Initiatives



The frustrating part of using the Synergy Projects module is the look of the Project Card. It does not change for different types of Projects. In Synergy, the Item Card can be modified by the Product Assortment and can display different fields.

We are finishing a solution for your organization. We will allow Free Fields to be displayed / Hidden based upon a field within the Project Card.

As an example, you may have a Project Card for New Product Development showing fields for each of the milestones, while your Project Card for Quality Initiatives will have entirely different fields being displayed.

This functionality is already in place with our Workflow Plus Free Field Visibility Tool. The tool was recently modified to look for values that are within a request field (Dependency Field) and allow the creation of a modified Input Field value to display / Hide the value. It is expected to look like this example for all of the Project Card Free Fields.

Dependency Field	Input Field	Hide
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

When Building a Project Card for these different tasks, Free Fields will be used to display information that is unique for that Project Type. Along with this tool, you will probably be interested in the GLM Project Plus Free Field Tool. The tool adds 155 new fields for the Project Card.

Call us for more information or demo on either of these Tools..

Catalog of Synergy Tools & Price Sheet

This Catalog provides a summary by each tool of our tools, including its use and functionality. Download it here for our most recent catalog.



Pricing of our tools is scheduled to raise slightly in 2018, so if you are planning on ordering, do so before the end of the year. If you are interested in any of our tools, please contact us for a demo.

[Catalog Download Here](#)

[Price Sheet Download Here](#)

Upcoming Enhancement to Browse / Reference Tool

A new feature for the GLM Browse & Reference Tool will make it possible to display the values in a dropdown list instead of a searchable browser.



We have some customers that want their Resources to see only a drop down list with their options, making it easier to enter data.

Using this tool, You will still build a custom browser (or use an existing browser) and we will have a combo box displayed. In the workflow, you will view a dropdown list with the values, rather than the search browser screen..

The drop down list will also have the cascade/dependable functionality as we have in the browse field. This Cascade functionality was described in our previous newsletter

This functionality will be provided to all of our current GLM customers of the Browse / Reference Tool as part of their Annual Maintenance.

If you would like to see a demo of this Tool, please contact me.

Macola Evolve Conference

SynergyExpert.com will once again have a trade show booth at the Macola Evolve Conference. This year it will be held in Chicago, Illinois on April 3rd through 5th.



Our staff will be available to answer Synergy questions, offer ideas on Synergy Best Practices and Discuss / Demo our full product line of Synergy Tools.

Gijs Lamers, from GLM Systems is expected to join us at the booth and can provide details about current and upcoming tools that their Programmers are working with.

Our Synergy Phone Integration received a lot of interest at last years Conference. This year we will be highlighting the GLM Procurement Plus Module, allowing organizations to further eliminate paper based processes for Purchase Requisitions, Request for Quotes and Purchase Orders from Macola ES / Macola 10 or Globe.

A Flowchart of this Procurement Tool is available for downloading. Call us to se up a demo.

[Download Here](#)

How can we do this in Synergy?

With a simple phone call, we can discuss your Synergy Topics and examine how a process may be improved through re-engineering or with one of the Tools that we promote.



Reach out to me at dkloepfer@synergyexpert.com or call me on my mobile phone at 847-867-4401 for a discussion of your requirements.

Our Development Partner (GLM Systems) recently added three additional programmers to their staff. New Tools will be developed to assist the Synergy Enterprise Community in 2018 and

beyond. If you have an idea for a new tool (solving one of your Synergy needs), let me know and we will review it with you and can develop this tool for other Users worldwide.

SynergyExpert.com
| 866-799-3485 | dkloepfer@synergyexpert.com |

SynergyExpert.com, 3550 West Salt Creek Lane, Suite 110, Arlington Heights, IL 60005

[SafeUnsubscribe™ {recipient's email}](#)
[Forward this email](#) | [About our service provider](#)
Sent by dkloepfer@donas.com in collaboration with



Try it free today