

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



Creating FAQ Support Requests

For your Customer Support or even Sales Staff, questions are asked to assist with the sale or support of products and services all the time.

By using a request similar to this example (which you can download a presentation below), you can make it easier for those individuals to share knowledge, that they or other Resources have already discovered.



This can be a very simple request, and by utilizing it with the new GLM Tool discussed in this Newsletter, Resources can have information immediately at that fingers.

[Download Presentation Here](#)

Can You Write a SQL Statement?

If you can write a simple SQL statement, you can use the new GLM Tool for placing Lists within a Workflow Request.

Why would you like a list to appear in the Workflow? Maybe you have information that is linked specifically to this Account / Contact / Item / Opportunity or Project that you would like displayed when the request is being used.



In this example, once an Account has been entered, and the Request has been either "Saved" or "Saved & Refresh", a list can appear on your screen. The example shown below is linked to both an Account and this specific Request Type.

It is displaying in the List, other Requests that have been saved into Synergy. You can use any of the fields to display the results you want your Resources to view.

Resource	Request ID	Start Date Used In Request	Description from Request
Jack McBean	280695	02/22/2018	Test
Jack McBean	279703	02/19/2018	Review of Financial Statement
Jack McBean	279699	01/19/2018	Review of Financial Data
Eric Meijer	279702	12/19/2017	Credit Review for Current Year

The Request ID field has a hyperlink that direct them back to each of the requests in the list.

Do you think it is difficult to place this in a request?

Building the Statement, Testing the SQL Statement and Deploying this Example took less than 30 minutes and I am no SQL Statement Writer Expert.

Call us for more information or a demo on this Tool.

I Need Your Ideas

This newsletter has been published for the past few years. I have tried to answer questions and offer new ways to accomplish tasks with Synergy Enterprise.

I need to hear from my viewers: What topics should I be placing into the Newsletter?

Some of our readers have been viewing it since its inception, while others have only recently subscribed.

Please share with me any topics you wish me to cover. I could be very basic functionality (some of what I have covered a few years ago), where to find answers or more sophisticated uses of the Synergy modules.

I appreciate your assistance in making this newsletter useful and beneficial.



Sharing Synergy Ideas?

I often brainstorm with fellow Synergy Accounts, looking to provide some assistance with their specific issues. Often, some great ideas come out of these sessions and I try to share them with my readers.

Perhaps you have found a way to solve a specific Synergy need, by creating a SSRS Report or building a workflow request. I would like to see examples that others organizations have created. And share them within this newsletter to other Synergy users.



Can you assist me? Reach out to me at dkloepfer@synergyexpert.com or call me on my mobile phone at 847-867-4401 with your ideas..

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.

If you are interested in any of our tools, please contact us for a demo.

[Catalog Download Here](#)
[Price Sheet Download Here](#)



GLM Manuals

Customer have been asking for more ideas and examples in the Manuals for the GLM System Tools. They are being updated (especially to new functionality) and will be made available in the next few weeks.



The first Manuals to appear will include:

- Workflow Plus
- Document Plus
- CRM Plus
- Logistics Plus
- Project Plus
- HRM Plus
- WordMerge Plus (This New Tool will be Announced in Two Weeks)
- Import Plus

Other Manuals will be available during the second quarter of 2018.

To our existing customers, we will be e-mailing them at the end of March, based upon the Tools that are enabled within your license.

Synergy users that want to explore the functionality of the Tools can request the manuals also. You may pick up some new ways to work with your Synergy application.

Macola Evolve Conference

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



Gijs Lamers, from GLM Systems will be joining us at the booth and can provide details about current and upcoming tools that their Programmers are working with. You may have some Synergy ideas that you have thought about, but have not been able to execute.

Bring these ideas up to us at the Booth (or better yet, send me your ideas and any supporting documentation you may have), and we can see if our "SynergyExperts" can provide some other assistance.

We will be setting up presentations of some of our Tools during the Solution Center Time at our booth. We will be announcing the times for each of the presentations in the coming weeks.

Of course, we will be able to spend time discussing and demonstrating with attendees on all of our products and manuals at the Conference.

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