

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



Macola Evolve Conference Take-Aways

What a great few days in Chicago meeting with fellow Macola Evolve Synergy Users. Over the next few issues, you will find information that I discussed with visitors to our booth.

Evolve 2018
Embrace. Create. Innovate.

One topic that I will begin devoting more attention to is the use of workflows by organizations. Some ideas that we asked of me include:

1. How do I make Resources use workflows more efficiently
2. Reporting on workflow activities by Resources
3. Tips on Creation of workflows
4. Security within workflows
5. Viewing information in workflows
6. Fields within workflows

You will begin seeing these topics and more in this newsletter and others to follow.

Evolve Conference Winner

This year at our booth at Evolve, we had a drawing for a tool that was donated from our Business Partner GLM Systems.

GLM Systems Head of Development, Gijs Lamers pulled the name of Ryan Tollaksen as the winner. Deltaflex is from Racine Wisconsin and manufactures and distributes Rubber Parts to North American customers.

Deltaflex will be choosing a GLM Tool which will assist them in their Synergy environment. Included with this tool is the installation and training at no cost to them.

Be sure to ask Ryan at the next Evolve which tool that they selected and how it is being used within their organization.

Thanks for everyone that visited our booth at Evolve.

AND THE
WINNER
IS.....

A RUBBER PARTS COMPANY.



Geocodes from Your Databases

One of my customers provided me the name of a service that takes addresses from your Synergy & Macola files and can within minutes provide back a file with the Latitude / Longitude attached to the record.



The cost is minimal - I went on their website and found that I could upload 50,000 addresses for about \$150.00 as a one time fee.

When using the Macola 10 mobile application or other Proximity programs, this type of information makes it simple to locate other Customers / Prospects or other Account types. Even if you do not use Macola 10, there is a table in the database that has fields for the Longitude and Latitude for your accounts (Addresses)

Their website is <https://csv2geo.com> Take a look to see if this site can assist you.

Price Reductions

Changes in our pricing for two of tools include:

1. The **CRM Made Easy** Tool has been reduced from \$2,500 to \$1,000
2. The **Synergy Phone Integration** Tool for Inbound Phone Calls has been reduced from \$5,000 to \$2,000



We do know that some of our subscribers will not be attending this conference, but **ALL Synergy Customers may purchase these tools at the Conference Pricing till the end of May.**

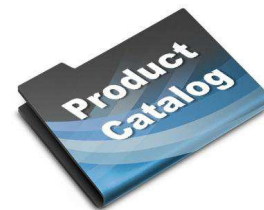
Contact me for more information or a demo of this functionality.

[CRM Made Easy Presentation](#)

Over 80 Plus Tools now in our Catalog - Take a Look

This Catalog provides a summary by each tool of our tools, including its use and functionality.

It now includes our most talked about tool at Evolve - Capturing signatures in a workflow request. Customers informed me that they could use this tool for different uses within workflow requests. I was amazed at their ideas.



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

[Catalog](#)

Keyboard Hotkeys for Functions

A few individuals at Evolve asked if I had any Hotkey lists (using Synergy Alt + Keys) for the different Synergy modules.

Their employees have been searching for these lists in the Customer Portal and have not been able to find them.

Attached is my list for the Workflow Module. Other Modules will follow in future Newsletters.

[Download Here](#)



Building Workflows

Before you begin to actually build a workflow process in Synergy - STOP and THINK and ASK Questions. Do Not BUILD a Request.

Many Synergy Customers show me their elaborate workflows and try to wow me with all of the functions that it can do. When I see it, I sometimes wonder how the Resources using it actually feel about it.



I believe it is better to ask your Resources what they think about the process. And what they would do to improve with it.

I have read many books and articles on workflow process changes. My past experience took me into a role with an organization teaching other resources how to assist in re-engineering their day to day business tasks. And the thing that I taught was "Think it from the Employee's View"

Have you solicited ideas from them on what is needed? Or have you just put into a Synergy request all of the fields that a manual process uses?

Workflow should be deigned to assist, not hinder an organization's tasks.

In future newsletters, I will be sharing more ideas on workflows within organizations.

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

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

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