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

SynergyExpert.com
Powered by The Donas Group, Inc.

Workflow Search Criteria

As part of my commitment to share more information on Workflows that I took away from the Evolve Engage Conference is that Resources need more information available for training.

I have created the attached document to begin this process with the "My Workflow" Search Criteria fields.

There is a huge difference in the number and type of fields that can be used in a Request Advanced Search. Most Resources will find it easier to use the "My Workflow" search especially when looking for workflow that they have created or been an actor within.

The two most useful fields I use are in the "Involvement". By selecting the workflow option, I can find all workflows that are awaiting my action. The created option displays all workflows that I have created, so that I can see their status.

[Click her for the first presentation on Organizing Your Workflow".]

Removing the label "Section" from Requests

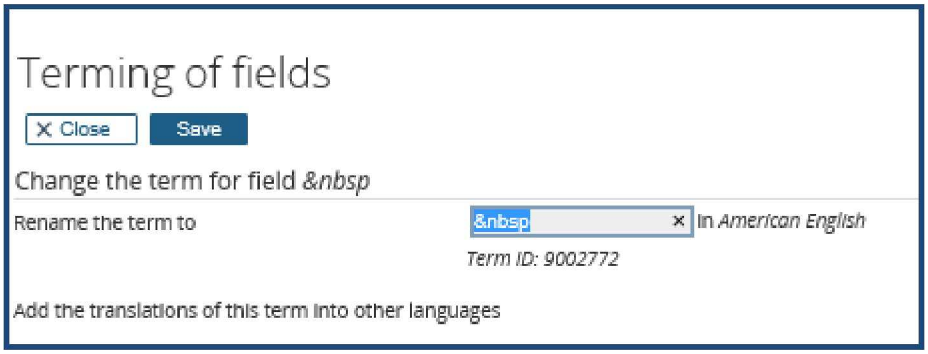
I see a lot of requests that customers develop themselves and I often see this label for Section within the request.

I strongly recommend the label be useful and meaningful to your resources. If not, questions may appear from these users, such as what does this mean?

To hide this label, you may do one of two things:

1. Enter a proper label within the Terming of Fields in the definition.

2. Change the label in the term to " " which is a special HTML formatting command which will eliminate the terms and be blank.



New SynergyExpert.com Website is "Live"

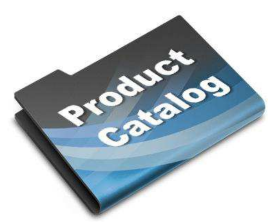
Our new website is now "Live".

This site is meant to provide information to fellow Synergy users. With all of the new tools that we offer, I have created new brochures and presentations on each of them

I will constantly be adding presentations and other useful Synergy documents to the site. Visit it often.

If you cannot find what you are looking for, please contact me at dkloepfer@synergyexpert.com.

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.

We will be discussing the use of some of the GLM System Tools in our future newsletters for workflows. Our two most common include:

1. Workflow Plus Additional Free Fields in a Request
2. Workflow Plus Report within Requests (Adding SSRS Reports to the body of a request)

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

Catalog

Calendar Personalization

Seeing many Synergy customers using the Calendar function, I am amazed that they can determine what has been completed or what is still to be done.

Resources using our CRM Made Easy Tool can visually see the word "Completed" after each workflow.

We can now add this functionality to any workflow request task within your calendar. View the third calendar request in your workflow and see how easy it is to see what has or has not been completed yet in my workflow.

Contact me for more information.

Tools to Enhance Security to Specific Synergy Applications

While at Evolve, I was meeting with one of my fellow business partners. They have developed for their clients, three tools which provide additional security for some Synergy functions.

These tools include the functionality to:

1. Limit access to the Preferences Gear, which allows changes to menu options. Access is only granted to Resources that have a specific Role assigned to them.

2. Limit access to the Customize wrench in the Account Card which is used to change the look of an Account Card. Access is only granted to Resources that have a specific Role assigned to them.

3. Limit Access to Workspaces, such as the ability to add / delete widgets on a workspace. Access is only granted to Resources that have a specific Role assigned to them.

I saw these tools in operation, and they are simple to use and implement. If you wish to have more information on these three tools, please contact Kimberley at Kimberley@harvestvi.com

SynergyExpert.com

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

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