

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



Workflow Search Columns (Part 3)

Searching workflows will result in the use of "Column" fields, which will display your desired results.



The third attached document (below) discusses the use of the Column fields, including Totals which you should think about while designing workflow requests. It can be a very beneficial function when combined with the criteria fields discussed previously.

[Click here for the first presentation on "Organizing Your Workflow".](#)

[Click here for the second presentation on Organizing Your Workflow - Advanced Search](#)

[Click here for the third presentation on Organizing Your Workflow - Columns](#)

Add existing Synergy action items (web based pages) to a workspace

When in the Workspace module it is possible to customize the menu picks for resources to click on. In addition to using the ExactMacola Launch action type (which adds some Core ERP menu options), menu options can be added using action items such as a Popup window or Hyperlink to an ASPX page.



These options require knowledge of the ASPX page for that action item. These pages can be found in the Synergy / Doc folder. In my demo system the path is C:\Program Files\Synergy\Synergy Enterprise\Docs.

In the Docs folder, the pages are grouped based on the module where the action currently appears. The attached table will help explain the groupings. This is not a comprehensive list of the pages used, but provides examples of the most common aspx pages.

Care should be taken when selecting the pages to use. For example, for item maintenance the EMIM***.aspx pages should be used instead of the ExactMacola Launch or the LogItemCard.aspx pages. Using the EM page will ensure that both databases are updated correctly.

I typically use Internet Explorer to find the name of the page by selecting Properties with a right hand mouse click and viewing Address (URL) If the value is a Macola designed page, it will begin with "EM".

[Common ASPX Pages for Macola 10](#)

Communications with Synergy Expert

You may inquire about the tools / manuals that we sell by one of three methods:

- Contact myself at dkloepfer@synergyexpert.com
- Call me at 847-867-4401 which is my mobile number
- Call our office at 847-956-6500 and ask for assistance.

We welcome your comments and inquiries.



Over 85 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.

One inquiry that I received last week was the ability to limit the number of characters used in a free field in a workflow request. The account wants to ensure that only an eight character alpha-numeric value is used (as an example).

Using the GLM Rules Engine, rules will be created to ensure that 8 characters are added to the field and no more or less characters are valid. When saving the request and attempting to move the workflow to a new status, validation will take place and if correct, then it will advance the status.

If the number of characters is incorrect, then a warning message will be provided to the Resource informing them of the error and the solution.

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

[Catalog](#)

Resetting Passwords to Synergy Portal Users

Over the past few weeks, I have been getting quite a few inquiries about the portals in Synergy. I will begin to address many of these inquiries via this newsletter.

When working with Synergy Portals such as the Customer / Partner / Supplier, passwords are required for entry. Before a password can be reset, the following criteria must be correct and complete:



1. The account status must be one of these three values: Active, Reference, or Pilot.
2. The e-mail address defined must matches the e-mail address in the customer, reseller, or supplier card.
3. The person must be an active contact person with web access.

If these three conditions are met, then a screen will appear that will allow a new password to be generated and e-mailed to the contact person. This screen will ask for either the Customer code / User Name and the e-mail address. This process will only succeed if the validation process is complete.

The e-mail to be sent to the contact person will be handled through a Synergy background job.

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