

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



## Workflow Pivot Analysis (Part 4)

Searching for data within the Workflow Pivot Analysis Tool will allow you to view the data not only as lists, but in charts and graphs, making it easier to spot trends.



The fourth attached document (below) discusses the use of the Workflow Plus Pivot Analysis tool. This can be very powerful to Resources and management alike.

[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](#)

[Click her for the fourth presentation on Organizing your Workflow - Pivot Analysis](#)

## You want to do What in Synergy? Visit our Catalogue to find out how to add this functionality.

Many time in using Synergy, you find limits on how many fields that you may have available to yourself or that a request needs more functionality such as building in more logic decision points.



The tools that we sell solve many issues with the standard Synergy product, Our Workflow Plus Request Free Fields (our most popular tool) adds **340** (yes, that is correct) new fields to a single request.

Now you can make your requests more useful to your resources by allowing them to enter data in specific type of fields (allowing for further searching and analysis options), rather than just using long comment fields.

If you are interested in any of our tools, please contact us for a demo. Or visit our website and take a look at the presentations for each of our tools. In the near future, we will be adding more videos to show you the use of these tools.

[Catalogue](#)

## Moving Requests to Next Status for Resources

I saw a document on the Partner Portal on a question that was asked of Exact Support Personnel, and thought it would be of interest to many Synergy Resources.

### The question:

When moving a workflow request from one stage to another stage for the same resource, is it possible to keep the request screen open to move it even further in its flow.

### The Answer from Support:

Workflow Requests and screens are always closed when they are moving forward to the next status. Even if the Resource is the same resource in the next status to be acted upon.



## 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](mailto: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.

## Changing Account Types and Statuses Using Requests

In Workflow Requests, there are fields available that allow an Account Type and Status be changed based upon the Status Movement of the Request. The field for the Account Type is "Next: Account(Type) which is found in the Flow tab.

This functionality is available in the following statuses of a request:

- Created
- Approved
- Realized
- Processed
- Rejected

An Account Type can be upgraded, but not downgraded. This means that a Prospect can become a Customer (this functionality is not available in Macola 10), but the Customer cannot become a Prospect.

The field for the Account Status is "Next: Account(Status), also found in the flow tab. The status of an account may be one of the following:

- Active
- Blocked
- Inactive



- Not Validated
- Pilot
- Reference
- Passive

The current status may be moved to any of these other statuses. This becomes a great way to change the status while in a request and having a workflow request document the change for historical information.

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