

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



## Tracking Capital Equipment with Synergy

Using Synergy Enterprise, it is possible to track information on the capital equipment used in your organization. While Synergy will not create Accounting functions (such as depreciations), you are able to track information such as:



- Sales related documents (invoices / product brochures)
- Maintenance documents (repair manuals)
- Upcoming scheduled maintenance
- Maintenance tasks completed

With the use of Synergy, you may be able to eliminate other third party software that you may be currently using. To start this functionality, we need to set up a Synergy Only Product Assortment(s). The items that are in these Assortments will never be uploaded to other ERP software, such as Macola, JobBOSS or MAX, unless desired through some XML commands.

In this Product Assortment(s), you may create Synergy Only Items. By design, these items are normally manually entered (one at a time). With the GLM Import Items tool and Excel, you may upload multiple items at the same time.

With each of the Product Assortments being used, you may wish to have additional free fields to use for each item. The GLM Logistics Plus Free Fields Tool can assist with this additional information. Common fields that should be used may include:

- Item Number
- Product Assortment
- Description
- Purchase Date
- Date of Item being placed in use
- Date item was disposed

Once all of the items have been entered, you may now begin creating Document Types. Make sure that the Item field is mandatory for each of the Document Types.

Keep the number of Document Types limited, as it will make it easier for Resources to know where these documents should be uploaded.

Part Two of this series will discuss the use of Workflow Requests for Scheduling and Tracking Maintenance.

## Catalog and Website Links

With over 85 tools in our website (and catalog), we are sure that you can find solutions for many of your desired enhancements with Synergy Enterprise.



One of our commonly used tool allows Multiple Resources to be required to Approve, Realize or Process in a single workflow request. Many customers use the Event Manager to chain multiple requests together to do this same functionality. With this tool, you send the request to a Role and all members will receive it at the same time. [Click Here for more information.](#)

Unlike standard Synergy, where once the first person has acted upon the request and its status is moved - this tool requires ALL persons to act on the request to change its status. Of course, you can always view the status of the request and see which Persons have acted or are still awaiting action.

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.

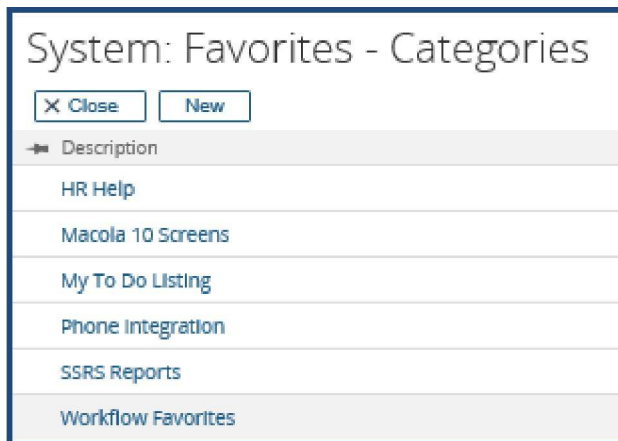
[Catalog](#)  
[Price Sheet](#)  
[Website](#)

## Favorites in Synergy

To maximize the benefit of using Favorites within Synergy, I always recommend setting up categories. This eliminates long list of favorites that Resources may have to scroll down to find / use.



Here is a sample of the use of Favorites in my demo environment.



If you need more information on Favorites in Synergy, click on the "Help" icon on the screen. This will direct you to current documents on this function.

## 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.

## Version 261 Availability and Enhancements



Version 261 is now available to Exact Software customers (not the ECi branded solutions). This latest version has several new features that may be of interest to you.

- A catalog widget was introduced, offering quick review of items and associated documents
- Enhancements for the User Interface for Workspaces
- Document and Document List widget is introduced.
- Search Widget
- Enhancements to Pivot Analysis Widgets
- Additional functionality on the Social Collaboration functionality that was incorporated in Version 259 and 260.

## International Reseller Partnership with Exact Software



The Donas Group has rejoined the Exact partner community as part of their International Partner program. Our organization has been representing the branded solutions for Macola, JobBOSS, MAX and other stand-alone Synergy installations due to the acquisition by ECi Software Solutions last year. With this additional partnership, The Donas Group will continue to represent the full line of Exact Software products in our marketplace.

The Donas Group, led by Jay Porras and Robert Donald, is a US based consulting organization that specializes in solving front and back office business problems for small and medium sized businesses. The Donas team has over 20 years of experience assessing and delivering solutions for businesses with the Exact Synergy business management solution.

Philip Bini, Director, Mid-Market Solutions Exact Americas, explains why partnering up with Donas is such an important step for Exact: "The partnership with Donas brings one more veteran partner to the Exact International Partner Community and the Exact ecosystem as a whole. Donas' broad reach and expertise, allows Exact to share our special message about Exact Synergy to businesses all over the world."

The new partnership represents another significant milestone in Exact's growth strategy in the Americas regarding our international software propositions. Headlined by the Exact Synergy and Exact Globe solutions, the Donas Group is widely recognized in the mid-market as a thought leading provider of front office business solutions, and the announcement of Donas joining the International Partner Program further confirms our commitment to the North American market and our customer base.

Jay Porras of the Donas Group has a long history of working with Exact: " The Donas Group has embraced the Exact Synergy product right from the start of our relationship and has always considered it an integral part of our business model. **We believe our SynergyExpert.com**

**website is a testament to our commitment to Exact Synergy and Exact Software.** We are excited to re-connect with Exact and look forward to continued success for both organizations."

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