

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



Reports Added to CRM Made Easy Tool

Our "CRM Made Easy" Tool was created to simplify the entry of completed activities with an account, as well as to place new callbacks and visits into the calendar for future follow-up actions.



We have completed work on the following SSRS Reports and Document which may be used in a Workspace for your Resources to access. There is no cost for these reports - simply send me an e-mail to request them.

The reports include:

- Completed Notes Activity
- Completed Callbacks
- Completed Visits
- Overdue Callbacks
- Overdue Visits
- Account Activity (Pre-Defined Pivot Analysis Views)

If you would like a demo of these reports (can be useful for Sales Persons and Sales Management), call me at 847-867-4401 to arrange an overview demo or receive more information.

Information on our CRM Made Easy Tool can also be found on our website at <http://synergyexpert.com/home-page/sample-page/real-life-crm/>

Overcoming Missing Information in Cards

This week, I had a MAX Customer using Synergy approach me and asked how they could place additional information on a Synergy Account Card, from their other SQL database.

One option is to use an Event manager to extract this information in a batch mode, probably every night and save it in free fields on the card. But what if you used up all of your free fields already, what can you do? You could always use of the [GLM Systems Account Card Free Fields tool](#) to extend the number of these fields. But this information is not updated in real time.



Your other option is to use the [GLM Tool for Accessing SSRS Reports on cards](#). Develop an SSRS Report and have it displayed on the cards with exactly the information that you need to see from your other database.

Both of these tools may be used by Synergy Users, regardless of their Back Office software. You may also use the SSRS Report on Cards tool for bring data from other software packages and populating Synergy screens.

Reviewing Activity / Non-Activity with Accounts

While working with an account this past week, I was trying to discover how I could find information such as the last time an account had a workflow request of a certain type.

Rather than going through Accounts workflow one by one, I remembered this report in Synergy. (Accounts: Requests - Recent).



It is found in the path Modules / Workflow / Reports / Recent. You have a number of filtering options within this report. They include Account Type, Status, Group, Classification or Division. Filtering within Requests allow the user to select, Category, Type and enter a date range (either being Date Created or Date Modified).

The top option allows you to select either:

- The last Request that was found with the filters selected
- If no Requests was found with the filters selected

I would recommend that you review this report. You may find it very useful when viewing Account Activity or Non-Activity with workflow requests.

Human Resources Management with Synergy

When dealing with Fellow Synergy Users, I am often asked - "What else can we use Synergy for in our organization?"

As I review their Synergy functions that are turned on, very rarely are HRM functions and processes are in use. All that Synergy is used for is to document users of the product and their roles / function rights.



Synergy can assist an organization in many ways for HRM. In this linked attachment, you can find ideas that should make you think of how this product can add value to your organization.

Tracking information on Employees can be done even if they do not access Synergy themselves.

[HRM Presentation](#)

Exact's Human Resources Users Manual (Too Big to store on this site - send me an e-mail and I can send you the latest version)

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.



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.

Our Developers are planning some mobile applications for displaying and interacting with Synergy. You will see more information on these tools in the near future.

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

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.

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