

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



Sales Opportunities



Over the past few weeks, I have had a number of Synergy Users ask about Sales Opportunities.

If you are in need of information on Sales Opportunities, then I have a document for you to view and discover many of your answers. [You may download it here.](#)

In coming weeks, I will also share a document that is in development that discusses Reports, Sales Funnel and Pivot Analysis views that will assist with the Sales Department and Management on Opportunities.

Knowing what is in a sales person pipeline is necessary data for management planning.

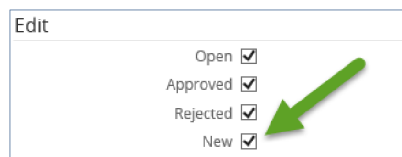
Making Fields Uneditable in a Workflow Request



I was asked this question this past week by a fellow Synergy User. How do I make a field in a request not editable once the workflow has been created and saved into Synergy? For most requests, simply review the Edit options in the workflow request definitions.

After exploring his requirements further in a GoToMeeting, we found that he had a workflow and wanted to only allow the editing of the field when it was created, not when it was in an "Open" status. The simple solution was to automatically have the request move to the "Approved" status using the "Approve automatically if no approver defined" in the Flow tab. By unchecking the "Open" in the request field definition, this would solve the issue normally.

However in this case, they had a four step workflow process, and could not easily modify it. With the GLM Systems "Field Editable Only in New Status" tool, a new option for editing a request field definition is added, allowing a field to only be editable when it is first created. This solved the issue.



[For more information on this tool, follow this link.](#)

Human Resources Management with Synergy



Continuing my work with the Human Resources module, I have attached a presentation that discusses the various sections of a Resource Card.

The HR Card has sections and fields that can be used for all sort of collecting and analyzing data. By reviewing this presentation, you may discover ideas that can assist you in utilizing this function more effectively.

[Presentation on HR Card Sections](#)

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)

Help Me Assist Other Synergy Users

I speak with many Synergy clients from North America, and am often wowed at some of the workspaces and SSRS Reports that have been created.



I would like to shares some of your SSRS Reports with fellow Synergy Users. If you have some that other Synergy Users can use, send them to me. I will send them out via links on this newsletter. If any of them require custom workflows, you may send me a xml file for that workflow also.

If you do not know how to use the Templating Tool or the XML Import Tool, let me know and I can assist you.

Let's Ignite your Synergy!

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](#)
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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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