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

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Past Newsletters

I have had a number of calls from Synergy Users asking if I could provide them or have a link with our previously sent newsletters.

I reviewed our previous newsletters and found that we started sending them in September 2013.

We are currently reviewing our website, trying to determine how we can make them easier for you to review and find pertinent articles that you are searching for.

We will keep you posted on our status with this project.

Word Merge Schemas

When building Mail Merge documents for use with Synergy templates, you commonly use the file that is found in your XML directory labeled:WordMergeSchema.General.xml

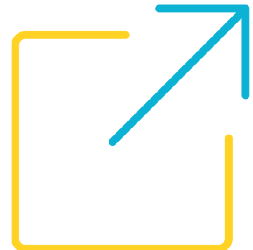
Users that have purchased Free Field Tools, such as the GLM Systems Workflow Plus Free Fields or their CRM Plus for Quotations now have a schema that includes the free fields that they need to complete the mail merge document creation.

These are placed into the Synergy / XML directory when those tools are installed alongside the standard schema.

Now with these tools, when you need to send our mail merge letters such as those created from workflow requests, you will not be restricted to just the standard request fields.

In the past I have shared documentation on building out these schemas, but many users have said it just was not worth the effort. Now it is simple to use these fields.

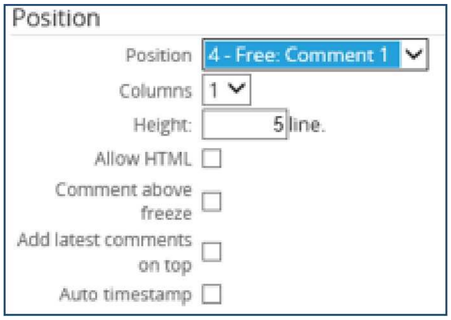
Changing the Size of Comment Fields in a Request



One of the latest enhancements completed by GLM Systems is the addition of allowing sizing of the free comment fields with their Workflow Plus Free Field Tool.

This functionality will work with the 20 free comment fields added with our tool, and the use of the Remarks:Request and Remarks: Workflow.

In the request field definition, there is now a fielding asking for the number of lines to be displayed. If you go over the number of lines defined, view the additional information using the scroll bar on the right side of the field.



[More information on this tool is available here]

Hiding a Workflow Request in the Create New List

While working with a client the past few weeks with Workflows and our [CRM Made Easy Tool], we found that some Resources were improperly creating requests. These requests were to be created as follow-up requests that were to be built by Event Manager or SQL Trigger background jobs, not by the Resources themselves.

My first suggestion was that they remove the Create: New Request screen for workflows by going to the Preference Tab and deselecting the Requests option from the "My Work, Create & Search" section.

But that eliminated the Search screen for Requests which was deemed important for them to use in Synergy. Option two came to me in the middle of the night, and I quickly went to Synergy to find a seldom used option by myself.

In a Request Definition on the General Tab, there is an option underneath the Category to select:

- Active
- Hide (which will not display the Request Type in the Request: New Page)
- Back Office

Check the "Hide" option and the Resources will not be able to create those requests unless you set up a hyperlink going to a New Request of that type.

Purchase a Tool, Receive a Free Manual

Through the end of this year, for all customers purchasing a new tool from our organization, we will provide a copy of our Manual "Effectively Using the Fields within Requests" at no charge.

This manual has been updated to Version 261, although very few changes have occurred since Version 258.

Download the Table of Contents and a sample page from this manual.

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.

Catalog
Price Sheet
Website

With all of our tools, we provide installation and training (30 minutes) at no additional costs.

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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