

Workflow Plus e-Mail Notification Tool

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Features

This tool is used when a resource wishes to be notified by e-mail when requests are in their workflow

Example

Email: notification (Request type)

Request type	Approve	Rejected	Approved	Realize	Process
1a Marketing Follow Up (NEW)	✓	✓	✓	✓	
1b Salesperson F2F Follow up on Mailer Share (NEW)					
1c Telemarketer Follow up on Mailer You Own (NEW)					
1-Notes on Opportunity		✓			

Using This Tool

- ✓ To notify a resource that a request has been sent to their workflow
- ✓ Resources can select which type of request and the status of the request to be sent via e-mail
- ✓ Hyperlink from e-Mail will open Synergy for the request

Issues Solved

Allows Resources that do not check Synergy often to be notified that some action (a request) has been sent to their workflow

Skill Set to Use this Tool

The following skills are useful with this Tool:

- ✓ Have a basic knowledge of Synergy
- ✓ Works with requests

FAQ's

- ✓ Installation / training / enhancements & on-going support covered by annual maintenance
- ✓ Maintenance plan is required for tool to be used
- ✓ Enabling Add-On Role required on Synergy license for resources
- ✓ Works with all Synergy Enterprise sites and ERP system data

Contact Us

Contact us to schedule a demo or
receive additional information on
our tools

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