

Workflow Plus e-Mail Tool

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Features

- ✓ This tool is used when a resource wishes to send a copy of a request to an email address
- ✓ This can be achieved even if Outlook is not installed

Example

Request (E-Mail) - Dirtworld Biking - New Business - Completed ☆ ?

Recipient: Request

Account

Contact Main All

Person 1 Jack McBean — Jack@synergyexpert.com

Recipient: Extra

To

Cc

Bcc

Message

Administration 001 McBean Bike
Date March 29 2018 By Administrator
Visit - 285697

Create	Process
Jack McBean 03/25/2018 11:31	Jack McBean 03/25/2018 11:57

Use This Screen to Document Notes Regarding Discussions for this Account

Employee	Jack McBean
Account	Dirtworld Biking
Contact	Jim Putnam
Opportunity	0
Visit Date	03/29/2018
Visit Time	03/29/2018
Visit Made	Yes

Notes

Need to set appointment to speak with him and visit in the next week.[Jack McBean 03/25/2018 11:26 (GMT -05:00)]

Use This Screen to Document Future Activities for this Account

New Callback Date	Callback Time	----
New Appointment Date	Appointment Time	----

Use This Screen to Attach Documents for this Account

Document

~~This Screen Will Be Used in Future Software Releases - Do Not Delete~~

Using This Tool

To quickly send a copy of a workflow request to either another resource or outside individual

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Issues Solved

Greater functionality, including:

- ✓ Multiple e-mail addresses can be used for sending
- ✓ E-Mail addresses may be manually entered
- ✓ Attachments may be included in the e-Mail
- ✓ Attachments may be selected / deleted from e-Mail

Skill Set to Use this Tool

The following skills are useful with this Tool:

- ✓ Have a basic knowledge of Synergy
- ✓ Rights to view workflow 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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