

## ***“CRM - Real Life” Synergy EventPak***

***“Before Synergy, we could have employees in sales and accounting talk to the same customer and not even know it!”***

Synergy by Exact Software enables organizations to manage processes and operations, such as customer relationship management, customer self-service web portals, electronic workflow, knowledge & document management, marketing programs, resource planning and on-line reporting.

Our EventPak simplifies the implementation process of a CRM application for Synergy. In a normal Synergy implementation, an organization will define workflow processes to meet specific business requirements. As a result of this step, “workflow requests” will be created. Once created, the business process need to be tested and possibly modified to fit real-life business situations.

Organizations requiring a CRM application find that they can begin the using our solution as an out-of-the-box solution requiring minimal customizations. This means you can begin using Synergy quickly (often within days of installing the software), and as you find additional applications, new workflow processes can be created.

If you have additional needs outside of the CRM EventPak, our organization or your Synergy Implementor can assist you to personalizing your Synergy installation. We can help you define new workflow processes, create requests, extract data and provide guidance on enhancing it for your business.



- ✓ Workflow Events – “Account Notes” Follow-Up Created for New Accounts entered into Synergy
- ✓ Workflow Events Easy to Access for Action Steps
- ✓ Calendar View Modified to Highlight “Processed Steps”
- ✓ Action Steps Easy to Schedule
- ✓ Track Request Activities by Resource
- ✓ Automatically trigger workflow alerts for Next Step Activities based on Processing Accounts
- ✓ Reduce “Misplaced Leads” or “Missed Next Step Follow-Up”
- ✓ Enhance Process Adherence through Defined Workflow Stages and Task Routings
- ✓ Monitor Opportunities in Sales Pipeline

[www.synergyexpert.com](http://www.synergyexpert.com)

1-866-799-3485

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