

Overview

Synergy for MAX supports additional functionality and products in addition to the standard capabilities of Synergy; some of these are listed below.

More information can be obtained from your Exact Account Manager.

Add-on Modules

Custom Request Search Pages

Get the data the way you want it with full integration with MAX and Synergy. Here is an example of a "recall list" from the Sales Forecast requests by Resource linked to the MAX Sales Rep Master data.

90 Day Forecast by Resource as of 11/28/2008 4:59:45 PM

Select Resource

90 Day Forecast starting 12/01/08 by Resource as of 11/28/2008 4:59:51 PM

Territory	Account	Prod	End User	Description	Prob	Fcst Date	Fcst Rev	Comments
West	CadBlu West	T76	Oro Alexander	Oro Alexander December	50%	12/12/08	\$34.0	11/26 Malley had pre-approved, tax write off interest
West	CadBlu West	T76	E Cad Cam	E Cad Cam	50%	12/12/08	\$34.0	11/26 trying to get big customer to lease for him
West	CadBlu West	T76	Paleny	Paleny	50%	12/05/08	\$34.0	11/26 No answer on friend's bank loan application
West	SICAM Servicio Internacional de CAM	T76	Samuel Rios	Samuel Rios	50%	12/19/08	\$34.0	11/20 Buy with another company in 2 weeks
East	CadBlu East	T76	Tang Jewelry	Tang Jewelry	50%	12/23/08	\$34.0	11/26 10% deposit after Thanksgiving, hope close in late Dec

Duplicate Account and Address Validation:

The following pages search for duplicate accounts, addresses and account/address combinations providing drill-down links to view, fix and delete duplicates to keep the data clean and productive.

Duplicate Account Addresses, starting with '%l' as of 11/28/2008 5:02:59 PM				
Code	Name	Address 1	City	St
9900876	J.B. Jewelers	236 N. Santa Cruz Ave.	Los Gatos	CA
9900877	J.B. Jewelers	236 N. Santa Cruz Ave.	Los Gatos	CA
9901056	Solvndra, Inc	47700 Kato Road		
9901057	Solvndra, Inc	47700 Kato Road	Fremont	CA
Count = 4				

Duplicate Accounts, starting with 'a' as of 11/28/2008 5:03:33 PM				
Code	Name	Address 1	City	St
7000060	A & A Quality Jewelers	712 S Olive St, Ste 512	Los Angeles	CA
7000002	A & A Quality Jewelers	712 S Olive St	Los Angeles	CA
990282	A&A MANUFACTURING	5 SOUTH WABASH	CHICAGO	IL
7000064	A&A Manufacturing	5 South Wabash St		IL
970001	ACMA NORDIC AB	ATTN: RAGNAR HASLIGER	SOLLENTUNA	
8800005	ACMA Nordic AB	c/o DHL Danzas Air & Ocean	STOCKHOLM	
7000078	Adel Chefridi Fine Jewels		Woodstock	NY
7000935	Adel Chefridi Fine Jewels		Woodstock	NY

Duplicate Addresses, starting with 'at' as of 11/28/2008 5:04:35 PM				
Code	Name	Address 1	City	St
7000169	Atlantic Casting Corp	41-32 27th St	Long Island City	NY
7000170	Atlantic Precious Metal Casting Inc.	41-32 27th St	Long Island City	NY
Count = 2				


Customer and Account Codes:

The following program provides an easy way to convert Account Codes to MAX Customer Codes so that these two codes will be the same in both systems. You can update the Account Type as part of the process.

Convert Prospect to New Customer				
Prospect Code	<input type="text"/>	MAX Customer ID	<input type="text"/>	Type
				<div style="border: 1px solid black; padding: 2px;"> Customer Reseller (VAR) Prospect Lead </div>
				<input type="button" value="Submit"/>

Account Source Code:

The following page provides an easy means to locate an account and update the Synergy Source Code

Update Account Source Data for A & A Quality Jewelers						Submit
Company	Address	City	State	Source		
A & A Quality Jewelers	712 S Olive St	Los Angeles	CA	Dental Lab Products		

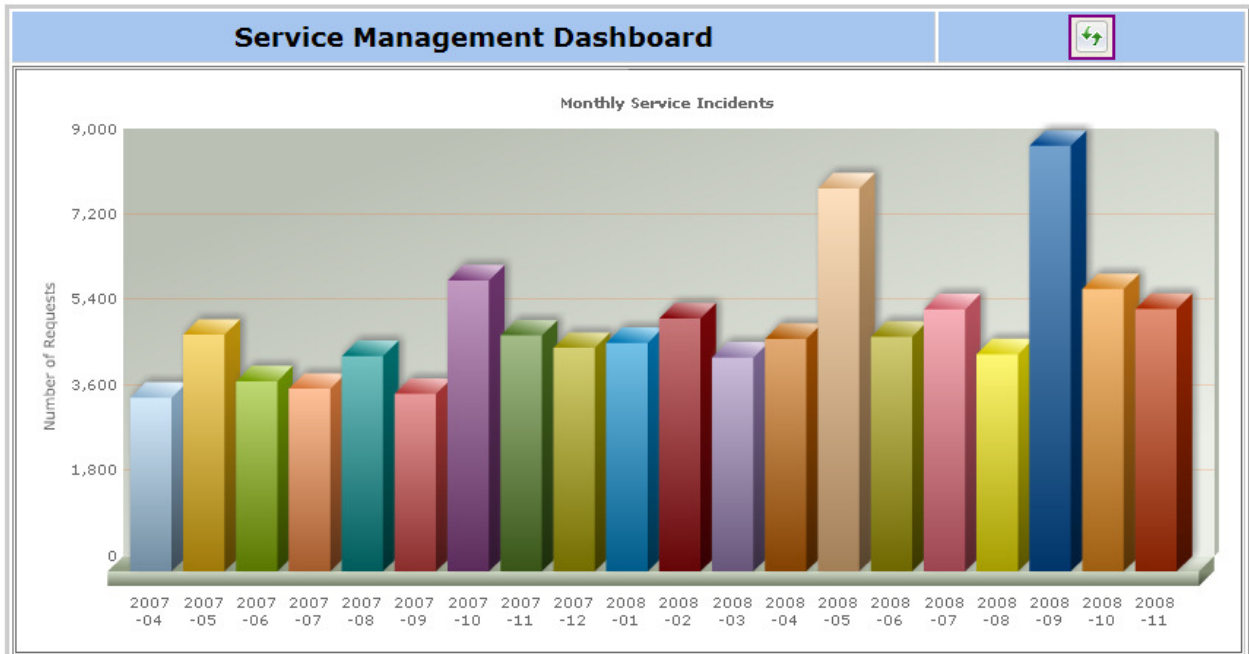
Serial Number Lookup:

Want to be able to find a Serial Number in Synergy using the Serial or the Account Name? The following page provides this easy access

Locate Serial Number as of 11/28/2008 5:16:01 PM		
Locate Serial or Company Name	<input type="text" value="GBT-140"/>	Submit
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Graphic Dashboards:

The following page is a graphic presentation of a metric and start page combined to monitor Service Requests. This can be applied to any area of the business using Synergy Requests for Sales, Finance, Service, and Quality.



Response	Resolution	Down Time	Customer Satisfaction
By Customer	By Customer	By Customer	By Customer
By Account Manager	By Account Manager	By Account Manager	By Account Manager
By Failure Code	By Failure Code	By Failure Code	By Customer

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Custom Metrics and Analysis:

Get summary data with detail drill-down that link to Request, Documents, Accounts or any data in MAX or Synergy.

The following is a summary of Service Incident Requests that link to the Serial Number and the underlying request.

Service Incidents by Month as of 11/28/2008 5:19:01 PM

Month	Count
2008-06	5
2008-07	2
2008-08	11
2008-09	12
2008-10	4
2008-11	45

Service Incidents by Month as of 11/28/2008 5:19:14 PM

Month	Incident ID	Company	Serial
2008-06	285	3D WAX	T66-9999
2008-06	292	cmf marelli s.r.l.	6BT-1407
2008-06	350	cmf marelli s.r.l.	6BT-1407
2008-06	353	cmf marelli s.r.l.	6BT-1407
2008-06	354	Multistation sas	6BT-1408

To Go Report as of 11/28/2008 5:19:38 PM

Backlog Section:

Territory	Account	Prod	Description	Prob	Fore Date	F/U Date	Fore Rev	Status	Ship Date	Closed Rev
Europe	Arseus Dental	D76	Dentaal Tema	100%	11/15/08	11/11/08	\$34.0	Booked	11/21/08	\$34.0
Europe	Chamorro Y Moreno S.A.	T76	Galicia FE08-11-520	100%	11/15/08	11/13/08	\$34.2	Booked	11/14/08	\$34.2
Europe	cmf marelli s.r.l.	T76	Raselli Franco	100%	11/10/08	11/10/08	\$32.0	Booked	11/14/08	\$32.0
Europe	Horbach GmbH	T76	Groeber FE08-10-519 - November	100%	11/30/08	11/28/08	\$34.1	Booked	11/10/08	\$34.1
Europe	Multistation sas	T76	Fabre	100%	11/22/08	11/18/08	\$32.0	Booked	11/26/08	\$32.0
Europe	Nika Rus	T76	Ukraine Customer FE08-11-521	100%	11/05/08	11/05/08	\$32.0	Booked	11/06/08	\$32.0
Europe	Ruta	T76	Ruta Customer #1	100%	11/14/08	11/10/08	\$34.0	Booked	11/24/08	\$34.0
Europe	Ruta	T76	Ruta Customer #2	100%	11/14/08	11/10/08	\$34.0	Booked	11/24/08	\$34.0
Europe	Ruta	T76	Ruta Customer #3	100%	11/14/08	11/10/08	\$34.0	Booked	11/24/08	\$34.0
Europe	Ruta	T76	Ruta Customer #4	100%	11/14/08	11/10/08	\$34.0	Booked	11/24/08	\$34.0
Europe	Spark Sales BV	T76	Horgen Design	100%	11/26/08	11/18/08	\$34.0	Booked	11/26/08	\$34.0
Europe	W. Kociuba Narzedzia Jubilerskie	T76	Hungarian Design School October FE08-10-516	100%	11/07/08	10/28/08	\$32.0	Booked	11/11/08	\$32.0
ROW	4C Engineering LTD.	T76	Saban Kaymak2 FE08-11-524	100%	11/28/08	11/25/08	\$32.0	Booked		\$32.0
ROW	Intriquity	R66	N.M Karel November	100%	11/27/08	11/15/08	\$26.0	Booked		\$26.0
Asia	DC Technology Co Ltd	T76	FE08-10-495 A demo	100%	11/06/08	11/06/08	\$29.7	Booked	11/07/08	\$29.7
East	Product Development Inc.	T76	K&T Jewelry	100%	11/21/08	11/17/08	\$30.0	Booked	11/24/08	\$30.0
East	Romanoff Int'l Supply	T76	Alquimia Jewelers November	100%	11/14/08	11/10/08	\$32.0	Booked	11/19/08	\$32.0
East	Romanoff Int'l Supply	T76	Ziamond	100%	11/21/08	11/21/08	\$32.0	Booked	11/17/08	\$32.0
Backlog Totals [Count = 18]										\$582.0

MAX GL Detail Reporting:

Want to view GL Detail from Prior Periods or want to see how the month is looking? View the MAX General Ledger Detail data used to build the From/To Charge Report in Synergy and export it Excel to share with Department Managers or monitor allocations.

View MAX GL Details as of 11/28/2008 5:20:51 PM

Select Account: Select Period:

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MAX GL Details for Account 1-500-4211 for 2008-08 as of 11/28/2008 5:21:25 PM

Date	Part ID	Qty	Std Hrs	Matl Value	Labor Value	OH Value	Total Value	Reference	Post
08/05/08	890092-35	1.00	5.28	\$905.15	\$84.47	\$295.63	\$1,285.24		2
08/29/08	890092-35	-1.00	5.28	(\$905.15)	(\$84.47)	(\$295.63)	(\$1,285.24)		2
08/05/08	990035-03	1.00	27.29	\$5,590.82	\$436.70	\$1,528.43	\$7,555.95	T2-4853	2
08/29/08	990035-03	-1.00	27.29	(\$5,590.82)	(\$436.70)	(\$1,528.43)	(\$7,555.95)	T2-4894	2
Totals... [Count = 4]				\$0.00	\$0.00	\$0.00	\$0.00		

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Microsoft Excel - GLDetails-Acnt-15004211-month-200808[1].xls

File Edit View Insert Format Tools Data Window Help

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	A	B	C	D	E	F	G	H	I	J	K	L	M
1	MAX GL Details for Account 1-500-4211 for 2008-08 as of 11/28/2008 5:21:42 PM												
2	Date	Part ID	Description	Qty	Unit Cost	Std Hrs	Matl Value	Labor Value	OH Value	Total Value	Reference	Order Num	Post
3	8/5/2008	890092-35	SK 115V T66BT	1	\$905.15	5.2791	\$905.15	\$84.47	\$295.63	\$1,285.24		200297170201	2
4	8/29/2008	890092-35	SK 115V T66BT	-1	\$905.15	5.2791	(\$905.15)	(\$84.47)	(\$295.63)	(\$1,285.24)		200300120201	2
5	8/5/2008	990035-03	UNIT, T66-T2, RoHS	1	\$5,590.82	27.2935	\$5,590.82	\$436.70	\$1,528.43	\$7,555.95	T2-4853	200297170101	2
6	8/29/2008	990035-03	UNIT, T66-T2, RoHS	-1	\$5,590.82	27.2935	(\$5,590.82)	(\$436.70)	(\$1,528.43)	(\$7,555.95)	T2-4894	200300120101	2
7	Totals... [Count = 4]						\$0.00	\$0.00	\$0.00	\$0.00			

Custom Sales Pipeline Analysis:

View Requests by Category or by Territory with Monthly Summary of the count and value of out over time. Get Weekly, Monthly or Quarterly views to get insight to future sales and manage backlogs.

Sales Pipeline for ASIA as of 11/28/2008 5:27:37 PM

Territory:

Category	Month 1		Month 2		Month 3		Totals	
	Qty	Value	Qty	Value	Qty	Value	Qty	Value
Prospects	0	\$0	0	\$0	13	\$426,873	13	\$426,873
Conversions								
Customers								
Totals	0	\$0	0	\$0	13	\$426,873	13	\$426,873

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Sales versus Quota

Set Monthly Quotas by Territory and integrate MAX Sales and Territory data in a clean presentation of Sales versus Actual.

View Quota Data

Select Year:

Year	Territory	Q1	Q2	Q3	Q4
2008	ASIA	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000
2008	HOUSE	\$25,001	\$25,000	\$25,000	\$25,000
2008	INTL EUROPE	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000
2008	INTL ROW	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000
2008	N.A. CENTRAL	\$100,000	\$100,000	\$100,000	\$100,000
2008	N.A. EASTERN	\$100,000	\$100,000	\$100,000	\$100,000
2008	N.A. WESTERN	\$100,000	\$100,000	\$100,000	\$100,000
Totals [Count = 7]		\$3,325,001	\$3,325,000	\$3,325,000	\$3,325,000

Add a Start Page with the quarterly (or monthly) Sales versus Actual that detects the user login data and presents the data for that sales rep for his Territory.

Synergy for MAX Add-on Modules



Quarters	QTD Quota	QTD Sales	%	YTD Quota	YTD Sales	%
Q1	\$1,000,000	\$1,149,307	114.9%	\$1,000,000	\$1,149,307	114.9%
Q2	\$1,000,000	\$760,485	76.0%	\$2,000,000	\$1,909,792	95.5%
Q3	\$1,000,000	\$827,343	82.7%	\$3,000,000	\$2,737,134	91.2%
Q4	\$1,000,000	\$354,998	35.5%	\$4,000,000	\$3,092,132	77.3%

Sales Start Page			
View	Accounts	Documents	Other
Recall List	Search Accounts	Search Documents	Search Resources
To Go View	Add New Account	Add New Document	e-Synergy User Guide
Sales Opportunities	Search Contacts	To Go Report	Training - Intro to e-Synergy Navigation
Booked List		To Go Report Monthly	Other e-Synergy Training
Shipment List			MAX Sales Reports

Document Presentation and Viewing

Using the standard Synergy Document Categories, provide a online "handbook" for staff, customers, VARs (Resellers) of sales collateral, knowledge documents, technical reference materials ,etc.

Locate VAR Handbook Documents <small>as of 11/28/2008 5:29:05 PM</small>		
Category	<input type="text" value="All"/>	<input type="text" value="Search for"/>
	<ul style="list-style-type: none"> All Analysis Artwork and Images Boolean Merge Directories FAQs Features and Benefits Forms Literature and Documents Models Technical Tips Presentations 	<input type="button" value="Submit"/>

Search Description or File names and view documents or attached files directly

VAR Handbook Category All for all Documents as of 11/28/2008 5:29:08 PM				
Subject	FileName	Category	Sub-Category	ID
Boolean Unioning PDF	Unioning.pdf	Models Technical Tips	General	855
Briefs Casting Guidelines InduraCast	Casting Guidelines for InduraCast.doc	Literature and Documents	Application Briefs	646
Can I mix STL and SLC files to create 1 model file?	View Linked File	FAQs	Support FAQs from VAR's	920
Case Study Jewelry Christopher Designs	Christopher Designs Case Study.pdf	Literature and Documents	Customer Case Studies	701
CastingTree View1 300dpi CMYK TIFF	Casting Tree1.tif	Artwork and Images	Models	928
CastingTree View2 300dpi CMYK TIFF	Casting Tree2.tif	Artwork and Images	Models	929
CastingTree View3 300dpi CMYK TIFF	Casting Tree3.tif	Artwork and Images	Models	930
CastingTree View4 300dpi CMYK TIFF	Casting Tree4.tif	Artwork and Images	Models	931
CastingTree View5 300dpi CMYK TIFF	Casting Tree5.tif	Artwork and Images	Models	932
CastingTree View6 300dpi CMYK TIFF	Casting Tree6.tif	Artwork and Images	Models	933
CastingTree View7 300dpi CMYK TIFF	Casting Tree7.tif	Artwork and Images	Models	935
CastingTree View8 300dpi CMYK TIFF	Casting Tree8.tif	Artwork and Images	Models	936
CastingTree View9 300dpi CMYK TIFF	Casting Tree9.tif	Artwork and Images	Models	937
Core & Cavity 300dpi RGB TIFF	Core & Cavity.tif	Artwork and Images	Models	854

Import MAX Serials

Load MAX Serial data from the Ship History file linked to MAX Customers and Synergy accounts.

Import MAX Serials as of 11/28/2008 9:21:55 PM						
Serial Number	Item	Cust ID	MAX Customer Name	Order Number	Synergy Acnt Code	Date
T76-3201	990039	990782	INTRIGUITY	20030032-01-01	990782	11/28/08
T76-3241	990039	980053	4C Engineering LTD.	20030520-01-01	980053	11/28/08
T76-3258	990039	990495	SparkTec B.V.	20031015-01-01	990495	11/26/08
T76-3266	990039	990063	MULTISTATION SAS	20030890-01-01	990063	11/26/08
Total Count = 4						
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