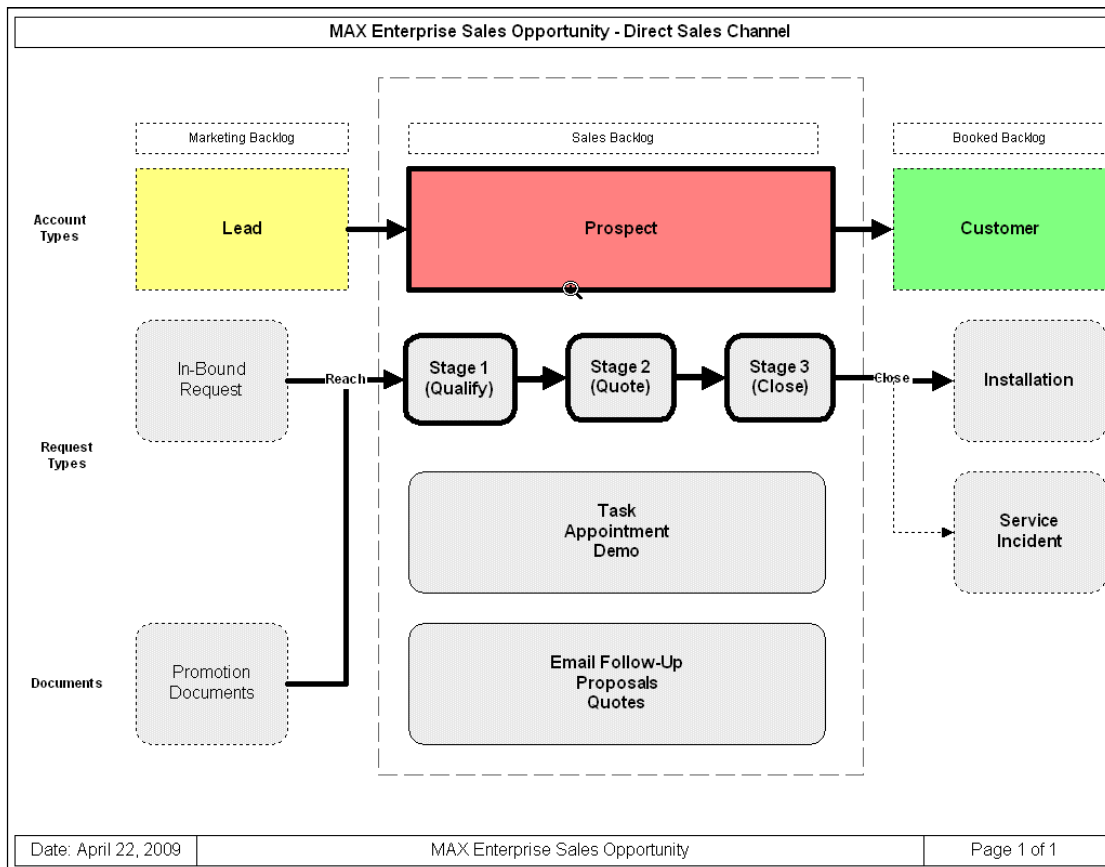


**Overview**

Synergy for MAX contains basic building blocks of data that can be combined and associated to meet unique business requirements as shown below:

**Synergy Sales Opportunities**

- Sales Cycles contain stages.
- Each Stage uses a unique Synergy Request to control the naming and flow of one stage to another. These Requests are not used for any other purpose. To keep the process simple, keep the number of stages to a minimum and be sure that all sales cycles can use the same stages. This is because different Sales Cycles (types of Sales Opportunities) can not be combined for analysis. Note: set up each Stage Request with a FLOW of "DO" (Realized) only.
- When a request is rejected at any stage it is considered "Lost"
- When it is Done (Realized) at the last Stage, it is considered "Won"



Each Sales Opportunity can be setup with different "stages" (or steps) in the sales process such as following example:

1. Stage 1 - Pre-Quality
2. Stage 2 - Quote
3. Stage 3 - Close

More Stages can be defined for each of the major steps in the process.

**Opportunities: New - Sales cycle**

Created: Dave Meyer 04/22/2009 10:04 AM Modified:

Save Save + New Close

**General**

Description Sales Cycle

Active

Stage	Delete	Description	Request Type	Request status
1		Stage 1 - Pre-Quality	211	Realized <input type="button" value="v"/>
2		Stage 2 - Quote	212	Realized <input type="button" value="v"/>
3		Stage 3 - Close	213	Realized <input type="button" value="v"/>

The each Sales Opportunity can be created (like a Synergy Project) to contain Account, Request, Document and related Synergy data to manage and monitor that opportunity.

**Opportunity card: DS00012, Deal: Undecided / Stage: Stage 1 - Pre-Qualify**

Created: Dave Meyer 04/22/2009 10:06 AM Modified: Dave Meyer 04/22/2009 10:08 AM

Edit View flow New: Document New: Request Close

Sales ALT E - Edit

Code	DS00012
Description	Sample Sales Cycle (In Process)
Owner	Dave Meyer
Account	Sample Prospect
Planned Amount / Probability	USD 10,000.00 75 %
Expected amount	USD 7,500.00

**General**

End Date 05/31/2009  
 Sales cycle Sales Cycle  
 Source Trade Shows  
 Stage Stage 1 - Pre-Qualify (step 1 of 3)  
 Next stage Stage 2 - Quote  
 Deal Undecided

**Monitor**

Documents Projects Workflow

**Requests**

	00.000.023	04/22/2009 10:08 AM	Approved	Stage 1
Creator:	Dave Meyer	Resource:	Dave Meyer	

**Competition**

**Partners**

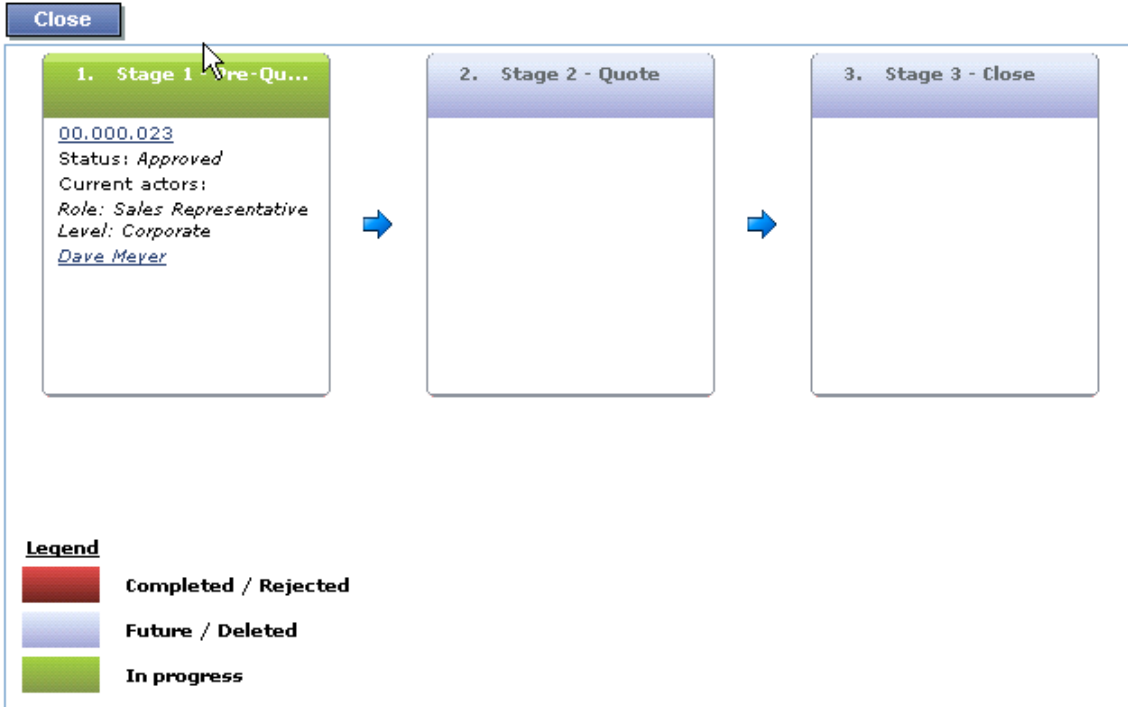
Account	Contact	Partner roles
---------	---------	---------------

**Items**

Description	Quantity	Unit	Sales price	Total
				USD 0.00

Remarks - None

### Process flow: Sales cycle definitions: Sales Cycle



### Workflow: Request Type - Stage 1

Created: [Dave Meyer](#) 04/22/2009 07:40 AM

Save Delete Copy Close

General **Fields** Flow Actions

#	Name	Label	Visible
1	<a href="#">Resource</a>		All
2	<a href="#">Description</a>		All
3	<a href="#">Remarks: Request</a>		All
4	<a href="#">Remarks: Workflow</a>		Open, Approved, Realized, Processed

### Workflow: Request Type - Stage 1

Created: [Dave Meyer](#) 04/22/2009 07:40 AM

#### Create

Security Level

Employees

Role

Role

Role

Next: Account(Type)

#### Edit (Open)

Creator

Resource

Role

#### Approve

Resource

Role

Approved: Inform - Creator

Assume: Ownership

Assign: Ownership

Next: Account(Type)

#### Do

Resource

Role

Assume: Ownership

Assign: Ownership

Next: Account(Type)

#### Process

Resource

**Opportunity card: DS00014, Deal: Won / Stage: Stage 3 - Close**

Created: Dave Meyer 04/22/2009 10:15 AM Modified: Dave Meyer 04/22/2009 10:17 AM

Sales				
Code	DS00014			
Description	Sample Sales Cycle - Closed (Won)			
Owner	Dave Meyer			
Account	Sample Prospect			
Planned Amount / Probability	USD 10,000.00	90 %		
Expected amount	USD 9,000.00			

Opportunity history				
Deal	Stage	Planned Amount	Probability (%)	Modified
Win	Stage 3 - Close	10,000.00	90	Dave Meyer 04/22/2009 10:17 AM
Undecided	Stage 3 - Close	10,000.00	90	Dave Meyer 04/22/2009 10:16 AM
Undecided	Stage 2 - Quote	10,000.00	90	Dave Meyer 04/22/2009 10:16 AM

Free fields	
Budget	
Authority	
Fit	
Timing	
Process	
Use RFP	No

General				
End Date	05/31/2009			
Sales cycle	Sales Cycle			
Source	Referral			
Stage	Stage 3 - Close (step 3 of 3)			
Next stage	N/A			
Deal	Won			

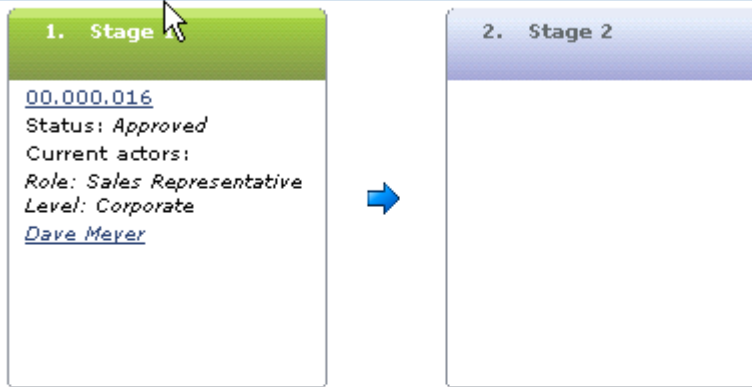
Requests				
✓	00.000.028	04/22/2009 10:16 AM	Realized	Stage 3
	Creator:	Dave Meyer	Resource:	Dave Meyer
?	:			
i	: [Administrator 04/22/2009 10:16 AM (GMT -07:00)] PO Number 12345. Won deal!			
✓	00.000.027	04/22/2009 10:16 AM	Realized	Stage 2
	Creator:	Dave Meyer	Resource:	Dave Meyer
?	:			
i	: [Administrator 04/22/2009 10:16 AM (GMT -07:00)] Done See Quote # 123435.			
✓	00.000.026	04/22/2009 10:16 AM	Realized	Stage 1
	Creator:	Dave Meyer	Resource:	Dave Meyer
?	:			
i	: [Administrator 04/22/2009 10:16 AM (GMT -07:00)] Done			

Partners		
Account	Contact	Partner roles

Items				
Description	Quantity	Unit	Sales price	Total
				USD 0.00

### Process flow: Sales cycle definitions: DS 3

Close



**Legend**

- Completed / Rejected
- Future / Deleted
- In progress