

Exact MAX

EXACT SYNERGY FOR EXACT MAX: COLLABORATION & WORKFLOW

Responsibility, visibility and productivity through enterprise-wide automation.



Automating your business processes has never been so easy. Exact Synergy provides the workflow tools needed to model and standardize your business rules, enabling you to automate, manage and track manual and hidden processes on a secure, centralized portal.

With Exact Synergy for Exact MAX you can:

1. Automate business processes to eliminate unnecessary functions.
2. Establish standard and rules-based working methods for greater management control and auditing.
3. Monitor and predict customer support, response and feedback.
4. Shorten cycle times and lower production costs through streamlined and automated processes.

Visible Workflows and Goals

By revealing the activities between people, knowledge and processes within the workplace, Exact Synergy creates an accurate, up-to-the-moment view of your organization's customer orders, engineering changes, requests, and much more, enhancing decision-making, analysis, scenario planning and ongoing management across your entire business. Exact Synergy automates the ongoing activities that put your organization in motion and makes individual workflows and corporate goals visible, so you can spot redundancies and decrease errors, while at the same time increase productivity.

Exact Synergy & Exact MAX: A Winning Combination

Certain transactions that occur in Exact MAX will automatically trigger workflow tasks in Exact Synergy. For example, when you create a quote in Exact MAX, the document is saved in Exact Synergy and a Sales Forecast is automatically created to assist with managing that sales cycle.

Workflow is also integrated with Exact MAX's RMA maintenance functionality. When Exact MAX generates an RMA, a workflow request is automatically created in Exact Synergy and will notify the appropriate person of the pending return.

Exact Synergy Collaboration & Workflow Highlights

- Ensure key internal and external stakeholders have secure access to the information that they need to conduct daily business efficiently and productively.
- Create quotes, sales orders, and RMAs in Exact Synergy and know that the information will flow directly into Exact MAX so your sales and customer service teams are working hand-in-hand with your production team.
- Provide secure views of critical data, including: inventory, parts, sales and purchase orders, BOMs, work orders, RMAs, and sales history directly from Exact Synergy.

Exact Synergy Workflow Defined

With Exact Synergy, workflow consists of "request types" that are customizable. A request type is any action that occurs within an organization, including those involving appointments, HR requests, training, sales, marketing or finance. All requests are linked with their corresponding resources, projects, assets and documents

so that all corporate operations are traceable and interrelated.

Only when a task has flowed through the required individual for approval can it then be considered completed. At any time, work can be viewed, remarked on or generate an alarm so that bottlenecks are avoided and follow-through is ensured.

One Source for Activities

All activities and the information surrounding them are located on one collaborative platform, making workflow available to employees, management, vendors, suppliers and partners as tasks and requests are created.

Activity Monitoring/Exception Management

Any task can be examined, analyzed or triggered at any time for notification on involvement, due dates, follow-through, log jams and exceptions, including urgency level parameters.

Automated Flow

Based on the request type, tasks automatically appear in an individual's workflow, according to the necessary actions dictated by the task. A task can require documentation, collaboration or deadlines, and can be defined to follow a resource path until the request has been processed.

Role-Based Security Model

Access to all information is based on roles and rulesbased schemas, in order to control and limit use to a need-to-know basis. Requests are given specific security clearance ratings so only those who possess the rating can access such information.

Analysis and Reporting

Synergy contains continuous monitoring capabilities to help you observe ongoing workflow. Through pivot analysis and divisional or departmental statistics, you can procure significant business information and respond quickly with action.

Enterprise-Wide Integration

Activity that might otherwise be isolated is by default linked in Exact Synergy. Projects, customers, financials and documents are inherently associated with one another in order to reflect the details of work, creating one intrinsically linked business process.

Exact develops both Exact MAX and Exact Synergy and offers them together as an integrated solution through a single point of contact for implementation, maintenance, and support. Upgrade your business today by integrating Exact Synergy with Exact MAX. Contact an Exact MAX Expert at 1.855.EXACTMAX (1.855.392.2862) to discuss how Exact Synergy can improve your business.