



## The Smart Way to Manage Tickets

CynergySoftware is the choice of software by many sales and support-center organizations. Many optional features also are offered to accommodate a wide variety of customer needs, such as telephony integration for inbound screen pops, first-level-support knowledge bases, and links to many popular databases and systems-management tools including scanning and asset management.

### CYNERGYSOFTWARE FEATURES

#### Tickets (Issues/ Requests)

Ticket Management (trouble, service, calls, and bugs).....	Standard feature, included
Web Form Ticket Generation.....	Standard feature, included
EMAIL Ticketing System.....	Standard feature, included
Priority Ticket Listing.....	Standard feature, included
Service Level Agreement Assignment.....	Standard feature, included
Unlimited Permission Levels.....	Standard feature, included
File Attachments Capability.....	Standard feature, included
Unlimited Quick Ticket Templates (html compatible).....	Standard feature, included
Unlimited User Defined Fields.....	Standard feature, included
Relational fields, drop down pick lists, check boxes, text area, text box, or radio button fields.....	Standard feature, included
Parent child relationship user defined fields.....	Standard feature, included
View support request history.....	Standard feature, included
Unlimited end users/customers can log tickets.....	Standard feature, included
Searchable KnowledgeCenter.....	Standard feature, included
Private staff notes for help desk requests.....	Standard feature, included
Staff Assignment Tracking.....	Standard feature, included
Group Assignment Tracking.....	Standard feature, included
Staff members can create and assign scheduled tasks and events.....	Standard feature, included
Dashboard display, showing scheduled events, tasks, new and open requests.....	Standard feature, included
Log Tickets/launch new customer from Web form submission.....	Standard feature, included
Customizable Priority Levels.....	Standard feature, included
Customizable Status Levels.....	Standard feature, included
Ticket grouping.....	Standard feature, included
Ticket Merging.....	Standard feature, included
Ticket Cloning.....	Standard feature, included
Department Category Masking.....	Standard feature, included
Forced valid entry on user defined fields.....	Standard feature, included
Ticket Integration with Knowledge Center.....	Standard feature, included
UDEF Masking.....	Standard feature, included
Department UDEF & Category Masking.....	Standard feature, included
UDEF Field Requirement ability.....	Standard feature, included
**Ticket Scheduling, puts ticket in a queue until create date.....	Standard feature, included
**View of ticket subject and comments without clicking into ticket.....	Standard feature, included
Saved ticket search for quick view.....	Standard feature, included
Last viewed items stored for quick reference.....	Standard feature, included
Wildcard searches for subject and comments for containing keywords.....	Standard feature, included
Create Ticket Wizard for simplicity.....	Standard feature, included

#### Customer Management

Company Profiles.....	Standard feature, included
Site Profiles.....	Standard feature, included
Contact Profiles.....	Standard feature, included
Unlimited user defined fields and sections for information gathering.....	Standard feature, included
**Region assignments (Ability to view only your region information).....	Standard feature, included
**Addition of different currencies for out of U.S. Regions.....	Standard feature, included
**Customizable email, phone, and addresses for each CRM tier.....	Standard feature, included

Track additional addresses per contact .....	Standard feature, included
Secure attached files.....	Standard feature, included
Add unlimited contact records.....	Standard feature, included
**Schedule activities and tasks directly tied to a contact, site, or company.....	Standard feature, included
View iCalendar in Agenda/Day/Week/Month format.....	Standard feature, included
Schedule <i>unlinked</i> activities and tasks .....	Standard feature, included
Create items for Customer Knowledge Center .....	Standard feature, included
Set up Multi-day events.....	Standard feature, included
Relational management/organizational charts.....	Standard feature, included
Create HTML links for internet/intranet access.....	Standard feature, included
**Create CRM record for all three levels on a single page .....	Standard feature, included
**Create campaigns for grouped contacts .....	Standard feature, included
**Ability to see which campaign associated with contact in record.....	Standard feature, included
**Add products to any CRM tier for record keeping .....	Standard feature, included
**Quick create CRM Record (Create all three tiers on one page) .....	Standard feature, included
****Customizable Dashboard for each user.....	Standard feature, included
****Dashboard and Log-in Page Announcements.....	Standard feature, included
****Address book that also works with Outlook Integration tool.....	Standard feature, included

### Asset Management

Create tickets from assets .....	Standard feature, included
View associated asset to ticket from queue .....	Standard feature, included
Search assets by CRM Record/ UDEFs, etc. ....	Standard feature, included

### Opportunity Management

Lead Tracking .....	Standard feature, included
Web Form Lead Generation.....	Standard feature, included
Priority Lead Listing.....	Standard feature, included
Unlimited Permission Levels.....	Standard feature, included
File Attachments Capability.....	Standard feature, included
**Opportunity Templates.....	Standard feature, included
Unlimited User Defined Fields.....	Standard feature, included
Relational fields, drop down pick lists, text entry, *check boxes, or radio button fields .....	Standard feature, included
View history.....	Standard feature, included
**Staff Assignment Tracking .....	Standard feature, included
Dashboard display, showing scheduled events, tasks, new and open leads .....	Standard feature, included
Log Leads/launch new customer from Web form lead submission.....	Standard feature, included
Email Opportunity alerts.....	Standard feature, included
**Campaign creation (email, append notes to group) .....	Standard feature, included
**View all notes on one screen for Company/Site/Contact .....	Standard feature, included
**Product tracking .....	Standard feature, included
**Apply and keep payment history and notes in Opportunity .....	Standard feature, included
**Assign an Opportunity to multiple contacts or sites .....	Standard feature, included
**Opportunity Rules Engine (send alert when fields change or sales person hasn't logged in) .....	Standard feature, included

### Time Tracking

Stopwatch time tracking from the ticket .....	Standard feature, included
Manual time entry per ticket response .....	Standard feature, included
Record time per staff technician.....	Standard feature, included
Edit hours tracked .....	Standard feature, included
Time summary reports .....	Standard feature, included
Export Time statements to Accounting system (.csv, MS Excel).....	Standard feature, included

### Alerting

Dashboard Notification.....	Standard feature, included
TAPI Integration (using the CTI Link from U.S. Infotel Corp.).....	Add on feature, additional
Email Notification .....	Standard feature, included
(When a new ticket is created by end user, all staff members are notified via email and the ticket shows up in the dashboard as unassigned ticket)	
Ticket Rules for escalation and email alerting .....	Standard feature, additional

### Installation

Application Installation .....	Online Install or ship CD, included
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**Manager Tools**

- Configuration Console for Administrators ..... Standard feature, included
- \*\*Notification of session timeout (alert to log back in) ..... Standard feature, included
- \*\*\*Crystal Reports Integration..... Standard feature, included
- Navigation audit (administration to can view which pages staff users have navigated to within the system).... Standard feature, included
- Export ticket search results to Excel ..... Standard feature, included

**Databases**

- Microsoft SQL server 2005 ..... Additional Fees Apply
- Microsoft SQL server 2005 Express ..... Standard feature, included

**Cynergy Development Platform**

- 2.0 .NET Framework with C# ..... Standard feature, included

**Other Modules (Ask salesman for pricing)**

- Integration with Outlook (icalendar & Address book).....Add on feature, additional
- Cynergy Tapi ..... Add on feature, additional
- Knowledge Center (customizable categories, file attachments, etc.)..... Add on feature, additional
- Email Ticket Submission ..... Add on feature, additional
- Webform Ticket Submission .....Add on feature, additional
- Webform Lead Submission ..... Add on feature, additional
- Integration with Active Directory ..... Add on feature, additional