Really.

synergist

How to

Ops guide

Setting up a new Client

GETTING STARTED

Creating a new client/prospect

In synergist go to the below…..

- Clients
- New
- Pick new client/prospect
- Use the beginning of the client's name making up the client code
- Fill in as much details as possible supplied by the client
- Save and close

New contract/Upsell.

In order to build a job from scratch we need 3 things, the client to be set up on Synergist and Agresso, the plan for the job and a Purchase Order number from the client to us.

Plans - We obtain the plans from the planning team (Team Charlie N). Make sure you check that the client facing budget and the budget model total up the same, if they don't send it back to planning and they will amend.

Client - If the client is new, New Biz will send you through the client details. They will be prospects on synergist so convert them to clients and fill in as much information as possible and send through the details to Andrea (current billings manager @ Centaur) to create them on Agresso.

Purchase order number – We cannot undertake any work unless we have a purchase order number from the client (it is an SMT decision if we start a campaign without a PO). As for a copy of the purchase order to see the value. Check this matches the billing plan. If it doesn't then the invoice will be rejected. (A **Purchase Order** (**PO**) is a document generated by the buyer in **order** to authorize a **purchase** transaction.)