



**Strategic Solutions that  
Make Your Work Easier**



**Projects Made Easier**



**Financials Made Easier**



**Compliance Made Easier**

# Have You Outgrown Your Systems?

## Buyers Say the Partner and the Product are More Important than Price

When the Standish Group did a study of companies with less than \$200 million in annual revenue, it found the majority of their IT projects were not successful. Twenty-two percent were canceled and 50 percent were challenged.

It also surveyed the top ten criteria for selecting software for these companies—two times. For their first software implementation, price was the number one consideration. But after the experience of one IT project, price dropped to the number five consideration.

For the second implementation, the support of the implementing partner became the top criterion, followed next by the partner's performance record (previously number ten) and then the ability of the software product to fit the business.

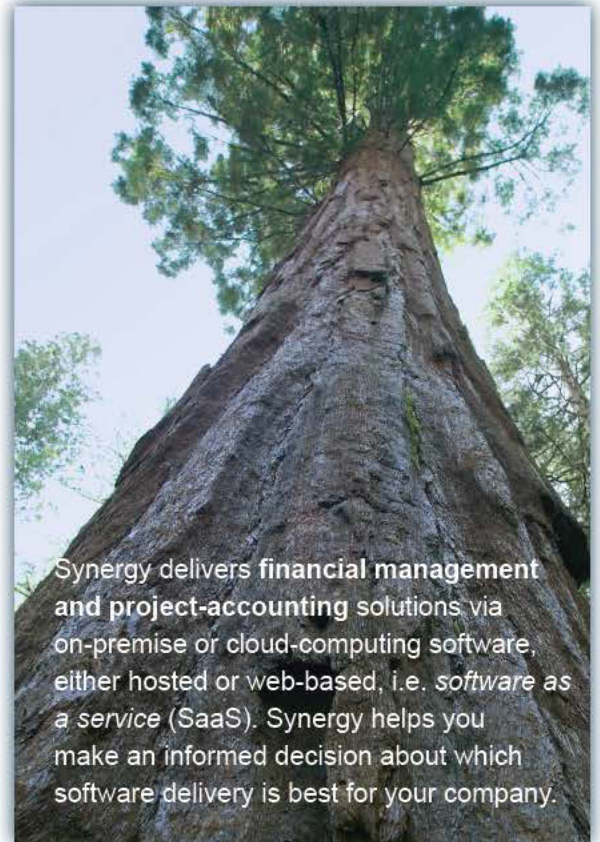
Clearly, the partner and product trump price for companies with second-time-around experience searching for a solution. ■

There comes a time in your organization's evolution when you outgrow many of your systems and procedures. The tools and software that worked well for you in the past are a hindrance today. You are unable to effectively manage projects, resources, time, financials, and growth with the efficiency you need to move your business forward.

## A Seamless and Integrated Solution

Synergy Business Solutions will help you leverage a single, integrated system—whether it's on-premise or in the cloud (hosted or web-based *software as a service* - SaaS)—that effectively links all aspects of your business together. You'll be able to run your business more efficiently than ever before. Synergy will help your organization lower costs, improve interactions with employees, customers, and suppliers, and help you make faster, smarter decisions. A scalable system with these strategic benefits will enable your company to grow more easily. **At Synergy there are three reasons these integrated solutions work:**

1. Synergy has many years of experience providing effective software solutions for project-based organizations and those in distribution, healthcare, hospitality, and nonprofits. Synergy has a solid reputation for helping clients make their projects, decisions, and business much easier.
2. Synergy consultants achieve success on every implementation because they perform a needs assessment and create a prototype with your data before you buy software.
3. Synergy reduces the implementation time and cost and provides many "best practices" because their consultants have successfully completed so many implementations.



Synergy delivers financial management and project-accounting solutions via on-premise or cloud-computing software, either hosted or web-based, i.e. *software as a service* (SaaS). Synergy helps you make an informed decision about which software delivery is best for your company.



Via software deployed on-premise or in the cloud, Synergy's expert consultants focus on solving financial management and project-accounting challenges for twelve select industries:

- Professional Services
- Business Services
- Software, IT, and SaaS
- Architecture and Engineering
- Research, Biotechnology, and Pharmaceutical
- Nonprofit Organizations
- Healthcare
- Hospitality
- Wholesale Distribution
- Construction
- Government Contractors
- Make-to-order Manufacturing

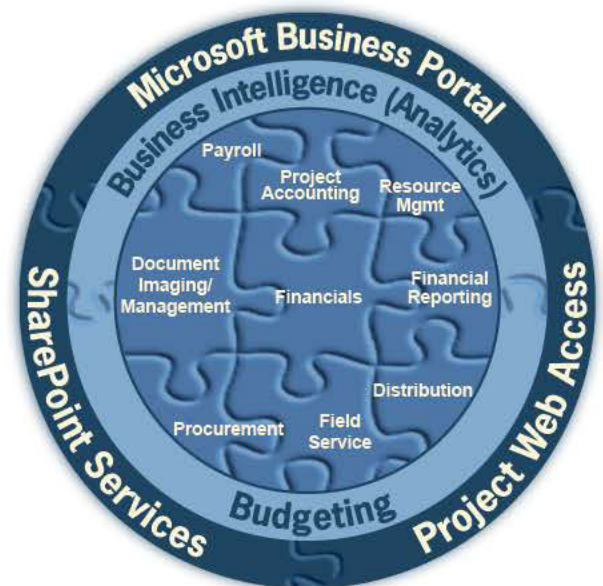


**Web-based Intacct Software**  
(Software as a Service - SaaS)

Synergy's solution ties your entire organization together:

- Project Management and Accounting
- Resource Management
- Time and Expense
- Financial Management
- Budgeting, Analysis, and Reporting
- Payroll (Union and Non-union)
- Distribution and Materials Management
- Field Service
- Web Portals
- Multi-currency/entity Management
- Revenue Management
- Order Management
- Purchasing and Inventory Management
- Fund Accounting

Whether your deployment is on-premise or SaaS, Synergy helps you leverage a single, integrated system that effectively links all aspects of your business together.



**On-premise or Hosted Microsoft Dynamics SL**

## Create New Competitive Advantages

Synergy's solution will help you:

- Be more profitable with projects or operations
- Increase productivity through automation
- Improve your cash flow through shortened billing cycles
- Enhance communication and collaboration through portals

Intacct is an award-winning cloud-based financial management and accounting system including project accounting. With a Synergy/Intacct solution, your financials, projects, decisions, and business become much easier as you automate processes, reduce cycle times, maximize profitability, improve access to real-time information, strengthen financial controls, and ensure visibility into your entire business. A powerful dashboard displays key financial and operational metrics giving you a comprehensive overview. Moreover, when your software is delivered via cloud computing, you dramatically reduce IT and operating costs.

- **Intacct Cloud Financial Management and Accounting** — Intacct delivers all the functionality your company needs, at a fraction of the cost of traditional accounting software. It is named by the AICPA as its preferred provider of financial applications.

**Core Financials** - Intacct's General Ledger, AR, AP, and Cash Management allow you to streamline data entry, accelerate and automate financial close, create accurate reports, and cleanly manage customer-payment cycles, as well as payments and cash.

**Time and Expenses** - Empower your employees with anywhere, anytime access to time and expense entry while eliminating one of the biggest impediments to finance productivity—manual, error-prone processes.

**Purchasing and Inventory** - Create a seamless chain of transactions, tailor purchasing to fit your needs, optimize price management, and configure inventory workflows.

**Order Management** - Automate the order-to-cash cycle, improve customer satisfaction, reduce costs, and increase sales by delivering accurate/timely customer order information. Also integrates with Salesforce.

**Revenue Management** - Helps your organization adapt and comply with evolving rules and guidelines, automates revenue recognition, billing, and renewal processes, and reduces Days Sales Outstanding (DSO).

**Fund Accounting** - Nonprofits can focus on their mission, not running software, as Intacct enables you to gain control over finances, improve operations, increase transparency, and minimize costs.

**Global Consolidations** - Effectively automate and control the global consolidations and close processes, while also improving financial visibility with real-time intelligence.

**Multi-currency Management** - Reduce the cost and complexity of running your business in multiple countries and ensure accurate, up-to-date financial visibility and control.



- **Intacct Project Accounting** — Intacct Project Accounting seamlessly incorporates project and financial information in real time, helping you make better decisions, deliver projects on time and on budget, and create more profitable and compelling future bids. Executives and project managers are empowered to easily track project performance and profitability and gain operational and financial visibility into the entire service delivery lifecycle.

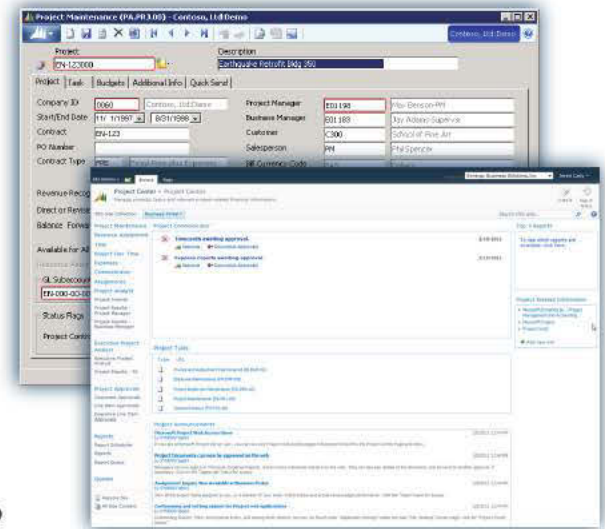
**Projects Made Easier**



Microsoft Dynamics SL is financial and ERP software that helps you solve your challenges with project accounting, financial management, government compliance, materials management, budgeting, bidding, and reporting. For project-driven organizations, your objective is to make your clients happy by being on time and on budget. Synergy helps you organize and automate business processes. Synergy's Microsoft solution allows you to effectively manage, measure, and analyze your entire business.

### Microsoft — Project Management and Accounting (PMA)

From smoothly launching new projects and tracking their progress, to getting invoices out the door, to analyzing projects and assessing results, PMA helps your organization's managers keep projects on track and your business thriving.



**Projects and  
Compliance  
Made Easier**

- Microsoft Dynamics SL — a robust, flexible solution built to meet the needs of project-based and distribution organizations, including government contractors. Its depth of project-accounting helps you adapt best practices, integrate with your existing Microsoft technologies, serve customers better, pass government audits, and excel in your industry. In addition to core financials, including GL, AR, and AP, modules include:

**Project Controller** - Quickly set up projects to fit your business, then manage them effectively with timely, detailed revenue and cost information.

**Time and Expense** - Streamline labor reporting with timesheets and expense reports that can be accessed anywhere, anytime over the Web.

**Flexible Billings** - Improve cash flow by automating invoicing processes and converting unbilled receivables more quickly to revenues.

**Allocator** - Efficiently manage project finances with customized rate structures, automatic allocation of charges and revenues, work-in-process tracking, and accurate project data for billing and posting.

**Project Budgeting** - Gain control of profitability with powerful tools to create budgets, track results, and preview the impact of changes.

**Contract Management** - Ensure timely and profitable project completion with features that help you track documents, handle change orders, manage subcontractors, and link payment to delivery.

**Communicator** - Keep projects on track with automated notification for deadlines and approvals, etc.

**Analyzer** - Gain ability to conveniently summarize, analyze, present, or compare project data.

**Materials Management** - Maintain control over all your distribution processes, from purchasing and inventory to optimizing sales, processing, and shipping orders.

- Microsoft Project 2010 — This solution is ideal for organizations that need strong coordination and standardization between projects, centralized resource management, and portfolio management.

### Microsoft Dynamics SL Financial and Project Reporting and Analysis



#### The Analyst

The Analyst addresses your diverse financial and project reporting needs through a familiar and easy-to-use Microsoft® Excel interface. It harnesses the power of Excel for reporting, analysis, and budgeting, and facilitates the distribution of financial information throughout the organization. The Analyst automates the production and delivery of the daily, weekly, and monthly management reporting package within hours of closing, from the project accounting, financial, distribution, and service modules.

Task Number	Description	Budgeted		Actual			Difference		
		Revenue	Expenses	Revenue	Expenses	Net Income	Revenue	Expenses	Net Income
SC-001	Planting Birch 200								
15410	Planting - Piping	\$ 30,000	\$ 27,000	\$ 2,000			\$ (28,000)	\$ 29,217	\$ (8,200)
15420	Planting - Live Oak	30,000	7,000	12,000	1,100	890	(25,000)	2,889	(11,000)
15430	Planting - Live Oak	10,000	71,000	26,000	40,120	7,942	89,880	84,987	(22,502)
15440	Planting - Live Oak	3,000	3,000	8,000			5,000		5,000
	<b>Total SC-001 - Planting Birch 200</b>	<b>103,000</b>	<b>114,000</b>	<b>38,000</b>	<b>12,220</b>	<b>11,141</b>	<b>(137,460)</b>	<b>(105,389)</b>	<b>(24,134)</b>
SC-002	Office Building								
10000	Office				1,215	320	1,215	(320)	895
10010	Office				2,648	798	2,648	(798)	2,248
10020	Office				2,450	888	2,450	(888)	1,762
10030	Office				4,507	4,108	419	(419)	
	<b>Total SC-002 - Office Building</b>				<b>11,820</b>	<b>6,116</b>	<b>5,704</b>	<b>(6,116)</b>	<b>5,704</b>

#### Management Reporter (formerly called FRx)

Take control of the future of your organization with Management Reporter. Get highly customizable financial reports, meet business objectives, and gain competitive advantage with budgeting and planning capabilities that allow you to plan more effectively and respond quickly to changing business needs.

#### BIO for Microsoft Dynamics SL

BIO is an easy-to-use analytics solution that provides all stakeholders with the unique ability to help impact:

- Increasing the lifetime value of customers
- Decreasing the cost of service and/or product delivery
- Strategic planning to expand your business

### Intacct Financial and Project Reporting and Analysis

#### Intacct Insight™

Insight allows you to build, plan, define, and measure your business—on your terms. This powerful set of analytics and reporting tools provides your business with real-time, accurate, and consistent visibility into financial and operational data. Through dashboards, interactive charts, multiple budget capabilities, reports and mashups, Insight enables stakeholders to make better decisions and drive performance through easy access to real-time financial data.

	Quarter Ending 12/31/2009	Quarter Ending 09/30/2009
<b>Assets</b>		
Current Assets		
1000 - Cash in Bank	8,794,629.45	8,794,629.45
1005 - Cash in Bank - Euro	0.00	0.00
1010 - Petty Cash	250,100.00	250,100.00
1015 - Undeposited Funds	0.00	0.00
1020 - Savings	946,365.00	946,365.00
1100 - Accounts Receivable	8,009,082.56	8,009,082.56
1125 - Allowance For Doubtful Accounts	45,821.12	45,821.12
1150 - Employee Advances	170.00	170.00
1200 - Inventory	75,382.21	75,382.21
1300 - Prepaid Expenses	622,045.60	622,045.60
<b>Total Current Assets</b>	<b>19,209,485.34</b>	<b>19,876,692.74</b>
Fixed Assets		
1500 - Equipment	1,327,815.00	1,327,815.00
1510 - Building	1,689,119.00	1,689,119.00
1520 - Furniture & Fixtures	141,100.00	141,100.00
1530 - Leasehold Improvements	1,149,470.00	1,149,470.00
1600 - Accum. Depreciation - Equipment	(12,815.00)	(12,815.00)



Create customized views tailored to your audience—real-time dashboards that contain exactly the information each executive, employee or external stakeholder needs. Manage your business, not just your finances. Easily define and publish key performance indicators across your business so you can plan and budget collaboratively and effectively, driving better business alignment.

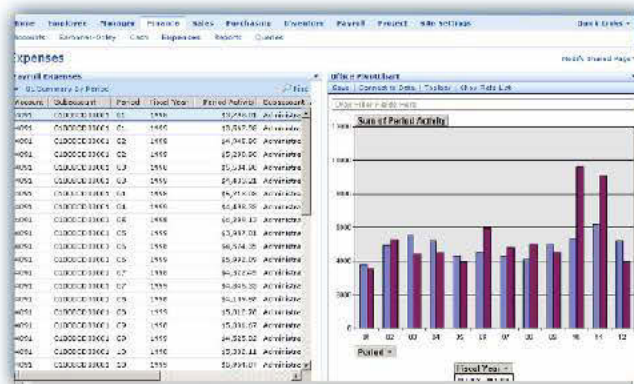


### Microsoft Dynamics SL Web Portals

**Dynamics Client for Office (DCO)** — Unlock business potential and enhance productivity by providing user- and customer-specific access to information and processes from a Web portal or applications run in Microsoft Office.

- **Microsoft Dynamics Portal and DCO** — Take the hassle (and expense) out of common tasks, reduce information support costs, and improve employee decision making. Employees answer their own questions and have access via the Web or Microsoft Office to project and financial information.
- **Time & Expense** — Enter time and expenses on the Web—with routing to approvers—and eliminate errors and duplicate data entry at the project and task level for costing, billing, payroll, and project status.

- **Key Performance Indicators (KPI)** — Executives and decision makers get at-a-glance access to key business metrics to quickly assess business health and take command when conditions change. Profitability, debt-to-equity, and gross margin are just a few of the KPIs you can create.



- **Project Analyzer** — Work via the Web to view key project financial, budget, and time information—across multiple projects—to assess performance, compare budgets against actuals, and get information needed to make informed business decisions. Measure and analyze all dimensions of project performance and profitability.
- **Project Web Access** — To collaborate with your team, publish assignments and project information from Microsoft Project 2010. Save time and improve accuracy by viewing important components of project management, Pert and Gantt charts, and project analysis in a secure portal.

### Intacct Web-Accessible Software and Dashboards

- **Comprehensive Dashboards** — Gain real-time visibility into all aspects of your business with role-based comprehensive dashboards, all accessible on the Web. Dashboards can be individualized to let you view key financial and operational metrics, which clients are most profitable, the true cost of projects, and any other aspects unique to your business.
- **Time & Expense** — Employees, subcontractors, and a mobile workforce enter time and expenses via the Web from anywhere at anytime.



- **Track Projects** — Dashboards help you monitor project performance and the profitability of each project, client, and team, helping you keep costs in check. Track operational and financial KPIs so you can plan, forecast, minimize costs, and develop better quotes for future bids.

# Why Synergy is Your Best Business Partner



Synergy is the leader in providing effective software solutions for project-based organizations on the West Coast. Synergy consultants have helped dozens of organizations become more profitable and efficient, including those in distribution, healthcare, hospitality, and nonprofits. Here are the six most important reasons your business will benefit from working with Synergy:

1. Industry Expertise — Synergy consultants have expertise and experience with all the industries in which they focus, including professional services, business services, software and SaaS, architecture/engineering, research/pharmaceutical, nonprofits, healthcare, hospitality, wholesale distribution, construction, government contractors, and make-to-order manufacturing.
2. You Get a Working Prototype Before You Purchase — To ensure you're on budget, on schedule, and have the functionality you need, Synergy creates a prototype, with your data, before you commit to the software.



3. Reduced Cost to Implement — Because of the upfront due diligence, planning, and prototyping, Synergy will have developed a precise road map to success. This provides you and Synergy with a clear understanding and direction of the tasks and requirements necessary for the most efficient implementation.
4. Synergy Understands Accounting Principles and Processes — Synergy's key personnel have been CPAs, CMAs, Auditors, VPs of Finance, Controllers, and held multiple project-based accounting positions. This depth of knowledge results in a best-practices approach to designing and implementing a solution.
5. A Microsoft Gold Enterprise Partner — Synergy has the highest level of implementation expertise. Most Synergy consultants have their Masters Certification in every aspect of Dynamics SL.
6. An Intacct Certified Partner — Synergy is trained and certified in Intacct's implementation program.



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**Microsoft** Partner  
Gold Enterprise Resource Planning

## INTACCT AWARDS

- 2013 Intacct President's Club
- 2013 Intacct Channel Star Award

## MICROSOFT AWARDS

- 2012 Dynamics SL Top West Region Partner
- 2010/09/07 Dynamics SL Award Finalist
- 2008 Dynamics SL Partner of the Year
- 2005 Dynamics SL Partner of the Year