



Budgeting & Financial Reporting Made Easy
For Jenzabar

Elevator Pitch

Built for higher education, Synoptix connects seamlessly to Jenzabar, giving finance teams the power to easily create custom budgets, financial reports, and forecasts—without waiting on IT.

Key Value

All-in-One Budgeting & Reporting:

- Easily build and automate budgets and financial reports
- Drill-down to transaction level

Tailored for Higher Education:

- Designed for complex, multi-segmented charts of accounts
- Embedded GL intelligence
- Fast setup of position management, departmental budgeting, and audit-ready reporting

IT Independence:

- Finance owns entire process
- Just point, click, and go

Flexibility:

- Easily make in-game adjustments
- Revise and track budgets in real-time as conditions change

Instant Insights for Smarter Decisions:

- Stop wasting time trying to find your data
- Instant data visibility enables faster strategic decisions

Market Leader:

- Same features as big-name competitors
- More cost effective
- Speedy implementation and training

Pain Points Solved

Spreadsheet & Data Overload:

- Ditch error-prone spreadsheets
- Bring together all data, from any source

Delayed Budget Reviews:

- Instantly generate updates—no waiting

Integration Headaches:

- Seamless connection to Jenzabar for a single source of truth

IT Bottlenecks:

- Finance is in control
- Create and edit anytime—no IT required. Generate reports on demand.

Opportunity Discovery Questions

- Are you using spreadsheets to create budgets or financial reports? How long does that usually take?
- What impact does the time delay have on overall productivity or other areas of business?
- How much does your team depend on IT support? Would it be beneficial to no longer need IT?
- What growth is expected in the next 3-5 years, and how prepared is your finance team for increased budgeting and reporting demands?
- Currently, how fast can you deliver requested budgets/reports - and does delay impact decisions?
- What challenges do you face with your current process that you wish you could solve?

Opportunity Buzz Words

If a customer says their current budgeting and reporting process is...

Spreadsheet-driven

Time consuming

Manual & error-prone

Complex

IT dependant

Slowing down decisions

That's your cue to introduce Synoptix.

Sell smarter. Closer faster. Partner with confidence.

Build stronger client relationships, deliver real results, and count on full support from our team—every step of the way, from discovery to demo to deal. You're never selling alone.