

Version 12.8 - Release Notes

Synergist Browser Interface

MAY 2022

Please note: These release notes relate to the Synergist browser interface only.

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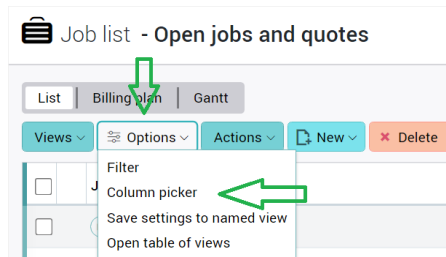
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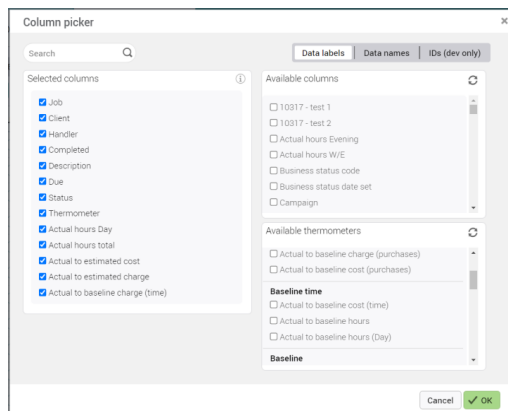
Key features of v12.8

Lists & tables

Users can now create customised views of their data including choosing columns. Many fields can be selected using the new column picker. Selected columns can be ordered, and column widths adjusted. Once the user is happy with the new list and the required widths/order it can be saved as a new view. A view now consists of both the filter and the selected columns. As shown below to access the column picker on a page go to 'Options' and then select 'Column picker'.

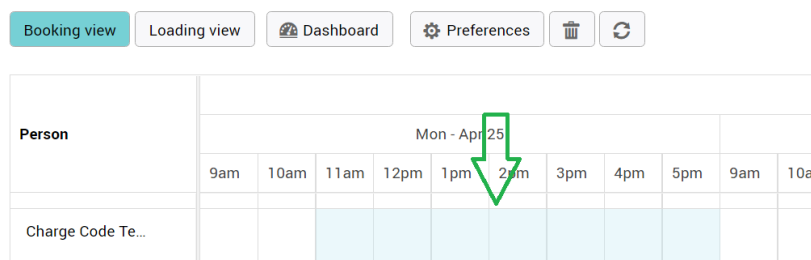


Within the column picker (shown below) users can also select multiple thermometers, sort order of columns, search for column names and remove selected columns.



Calendar bookings / MyCalendar

There has been improved functionality across the calendar bookings screen especially to how a user can now add or edit a booking. Previously a booking could only be added by dragging an estimate or requisition from a list below the calendar, but now a booking can be created by single left clicking into the calendar itself on the desired date/time and then filling out the booking details to save. A booking can now be added too by left clicking and dragging in the calendar to set the start and end date of the booking, this will also then bring up the booking details screen for it to be filled out and saved. Below is an example of what the click and drag looks like when highlighting an area to add in a booking.



Users can now single left click on an existing booking, and it will bring up the booking details screen where edits can be made and then saved. An existing booking can also now be copied and pasted by right clicking on the booking to copy and then right clicking on the desired date/time grid to paste. The copied booking will remain in the clipboard to paste until cleared.

Capacity thermometers have been added into calendar bookings. These have multiple uses. Some of the uses are showing how much time is left in the day, how many hours gone over by in the day, out of office time in grey and blank thermometers to make it easy to see nothing booked on certain days. Below is an example of days with nothing booked, fully booked in orange, capacity remaining for the day in green and overcapacity in red.

Week 4				
Mon - Jan 24	Tue - Jan 25	Wed - Jan 26	Thu - Jan 27	Fri - Jan 28
7.5	7.5	7.5	0	3
7.5	7.5	0	-3	7.5
7.5	7.5	7.5	7.5	7.5
8	8	8	8	8
7.5	7.5	7.5	7.5	7.5

Microsoft single sign on (SSO)

Microsoft SSO has now been integrated into Synergist. This can be enabled by ticking the 'Microsoft SSO enable' tick box found within Utilities > System Parameters > Settings within the heading 'Passwords/Access'. Once enabled it will force all users in the organisation to use Microsoft credentials to login instead of Synergist. The email addresses between the Microsoft account and the Synergist user account must match exactly for them to be linked up. As shown below, once enabled on the log in screen a 'Sign in with Microsoft' button now appears.



Forced multi-factor authentication (MFA)

A new drop down called 'MFA policy' has been added in 'System parameters' to control if multi-factor authentication should be forced or not. 'Optional' is where it is up to each user if they want to use it, 'Remind user' is where it displays a pop up reminding the user to set up multi-factor authentication and 'Mandatory' forces the user to set up multi-factor auth by removing all menu options with a pop up explaining this must be set up which will take them to the 'Preferences' user screen to allow MFA to be setup.

Multi-factor authentication

Allowed methods: **Authenticator App** × **Email** ×

MFA policy: **Optional**

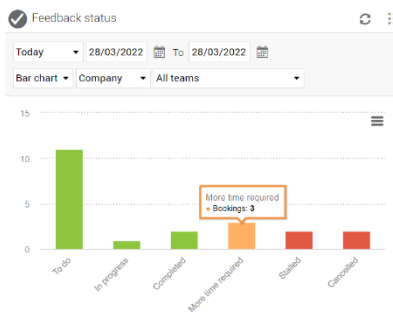
The Mandatory MFA policy option is only available to users with MFA.

Dashboards

A new dashboard has been added called 'Scheduling'. This has two main panels, 'Booked vs capacity' and 'Feedback status'. The booked vs capacity dashboard displays a chart showing hours available, holidays, booked (non-chargeable) and booked (chargeable) from date range and team/teams selected by the user. A line for the estimated hours is also shown to clearly display estimated work vs actual capacity. Below the graph is a breakdown of the values used to power the graph. The image below shows an example of a column being selected and the details of that column being displayed below it.



The feedback status as shown below displays the status of bookings in a quick and easy to digest graph. This consists of several selections to filter down further if needed by time period and team.



Saved views within Client, supplier jobs and phases can now be shown in dashboards. Views are saved filters and as shown below, these views in these areas have the option to be added to the personal dashboard. Ensure 'Display in personal dashboard' is ticked as shown below.

View name: **Clients with no jobs in past year**

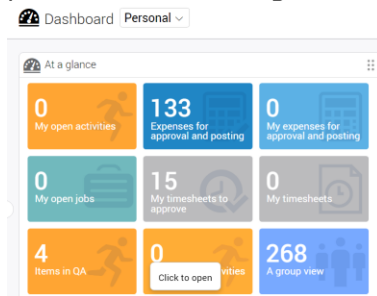
Standard list view

Make this the default view

Display in personal dashboard

Notes:

Below is what the 'At a glance' section looks like in the personal dashboard with several saved views shown in it. If the user wanted to open a view, they must click on the specific panel, and it will take them to the list version on the page the view was saved against. As also shown in the image below, the message 'Click to open' will appear in the panel when hovering over it.



Panels within a dashboard have now been implemented with drag and drop sorting capabilities. As shown in the image above, in the top right of the 'At a glance panel' there are six dots. When these are on a panel it means it supports reordering. To achieve this the user must click on the dots and then move the panel into the position they want.

@ Mentions added into job, phase comments and Synergist documents

The ability has been added to tag people with @ mentions in job or phase comments and in Synergist documents. This will email the tagged person to notify them of what they have been tagged in.

Batch invoice emailing

Email button has now been added to the top right of the invoice list page. This will allow the user to email a batch of invoices or a single invoice. Clicking the 'Print' button with invoices selected will complete the pre-flight checks to ensure there are no warnings or errors, then it will go to the batch invoicing email screen where the email can be reviewed before being sent. This can be sent to one or more contacts and is integrated with Microsoft 365.

Option for handler targets instead of client targets

Handler targets is a new option instead of using client targets. New Synergist customers will have this switched on automatically, but existing users can enable this setting to start using handler targets. The 'Use handler targets' option can be enabled in Utilities > System parameters > Settings. With this option selected everywhere that showed client targets will now show handler targets. Specific handler targets can be set within File maintenance > Handler targets and then selecting a user. For a further in-depth explanation to this please look under the 'Systems / Settings' header within this document.

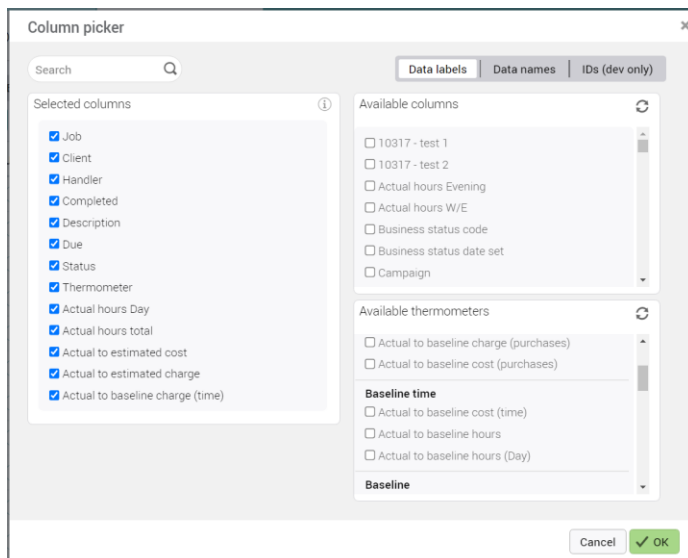
Gantt chart additions

Phases and stages can be added directly through the Gantt by selecting the blue plus symbol within the description column. The descriptions can now be edited directly in the Gantt. It is now possible to access multi-job Gantt from job list, client card, project card and campaign card. The ability to move sections within the Gantt charts has also been added.

Lists / Tables

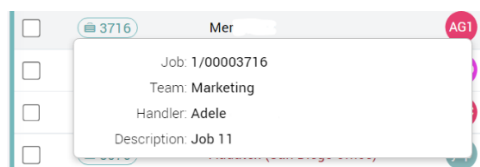
Multiple thermometers allowed (10395)

In views where thermometers are available there is now the ability to add multiple thermometers to the list. To control which thermometers are shown, go to 'Options' > 'Column picker'. The thermometers are under the heading 'Available thermometers' where they can be selected to show up in the 'Selected columns' section as shown below.



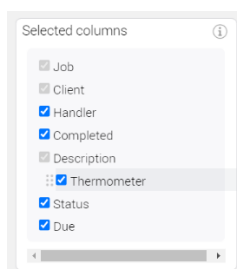
List changes (5042)

Key field columns now have tooltips to show extra information, the example below is from when hovering over the job number in the job list.



Users can now create customised views of their data by making the changes the user wants to the list / columns then pressing 'Save settings to named view' in the 'Options' drop down.

The order of the columns can be changed within 'Column picker' from the 'Options' drop down. As shown in the example below with the thermometer column, the user can now click and drag the selected column to where they want it to be shown on the screen.



Making picked columns sortable (10449)

Picked columns can be sorted by clicking in the column header. Click once for ascending and twice for descending. This is also available in the new selected thermometer columns.

Column auto resizing (10394)

When a list is opened the columns will now auto resize to fit the width of the grid displayed on the screen. There are a couple of scenarios where the columns will not auto resize, such as if the column is an initials column, or if the columns have had a custom size manually set against them already. A screen refresh will also cause an automatic resize on the columns if they do not fall into one of the two scenarios above.

List options/filter button (10422)

The 'Filter' button will be shown if the list can only be filtered but the 'Options' button will be shown if the list supports the column picker and saving of views also.

Enhanced views / dashboards for client, supplier, job and phase (9602)

Views are saved filters to enable administrators & users to set-up useful lists of records. With enhanced views a user can now filter on related records. eg. they might want to further filter a view to only list clients that have had no new jobs in the past year. This would be a useful view to show clients that are in danger of being lost. To create this filter, open the "Client related" section (as shown below). Select a date range, and then "Clients WITHOUT new jobs or active jobs". Apply this filter.

When the above filter is applied, remember this can be saved as a new view by clicking Views > Save / delete views. In the save view screen, there is a tick box labelled 'Display in personal dashboard'. When ticked this will also add this view to the user's dashboard, if required.

Within the clients list and views the new view created can now be selected, below is what was displayed from the one set up above.

Client list - Clients with no jobs in past year

<input type="checkbox"/>	Organization	Phone	Web URL	Type	Code
<input type="checkbox"/>	Baby Boo			Client	BABYBOO
<input type="checkbox"/>	Balfour Beatty Capital Ltd	020 712...		Client	BAL01
<input type="checkbox"/>	Ballandean Estate			Client	BALLAND
<input type="checkbox"/>	Banjo Enterprises			Client	BANJO

The above saved view was also saved to the dashboard and will now be shown in the personal dashboard. Clicking on the at-a-glance tile of the view opens it up as a list.

Initials column shows users selected colour (10378)

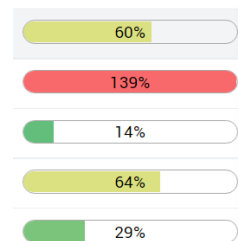
Instead of showing the standard green background on all initials, the initials background will now show the colour associated with that user.

Saving of column width resizing (10364)

When the widths of columns are changed, the altered width can be saved back to a view.

Thermometers have been updated (10352)

The thermometers displayed across Synergist have been updated as shown in the image below. The style now matches the rest of the system whilst being made easier to read and understand. Previously, there was a dotted line near the end of the thermometer which symbolised 100% but people confused this with 80% so this has now been removed. The thermometers fill up from 0 – 100, but the value can carry on increasing despite the thermometer being full.



New Estimate used % thermometer (7104)

This new thermometer is calculated by starting with the estimates and taking away the time sheets and also future calendar bookings, shown as a percentage.

Show job promoted information on selected job phase tab (10497)

Just like the won by / promoted details at the bottom of the details tab in a selected job, users can now see promoted details in the details tab of a phase.

Remembering last location in a list (10450)

Now when you click on a record in a list and it takes the user to another page or if the user navigates from the list somewhere else, when returning to this list it will remember the position of the page and still have highlighted the last record selected. This only works if not navigated to another list or refreshed the screen as this will clear the memory.

Calendar Bookings / My Calendar

Improved column order for requisitions list in calendar bookings (10273)

The column order within the requisitions list has been changed. Now the most useful columns are positioned first making the requisitions easier to search through and easier to read.

Added single click ability to add / edit calendar bookings (8989)

Within Calendar bookings the ability has been added to single left click and left click and drag within the calendar grid to create a booking within the selected area. This will now open the calendar booking popup screen where the booking details can be easily added, then saved to create the booking in the calendar.

Thermometer feature added to calendar capacity (9883)

A new feature has been added for capacity thermometers to give a visual representation of the capacity remaining instead of showing a solid colour for a day despite it being fully booked or not. The colour in the bars is incremented in ten percent blocks and will show solid orange if fully booked or a red bar if overbooked. The example below shows fully booked, overbooked and time remaining.

Week 4				
Mon - Jan 24	Tue - Jan 25	Wed - Jan 26	Thu - Jan 27	Fri - Jan 28
7.5	7.5	7.5	0	3
7.5	7.5	0	-1	7.5
7.5	7.5	7.5	7.5	7.5
8	8	8	8	8
7.5	7.5	7.5	7.5	7.5

Capacity thermometers added for all working days option (9901)

Previously the thermometers were only shown if a booking was present on that day. Now an option has been added in preferences labelled 'Show available hours when there are no bookings (can slow down the calendar refresh)', select this to show empty thermometers on working days with no bookings.

Out of office (OOO) thermometer (9952)

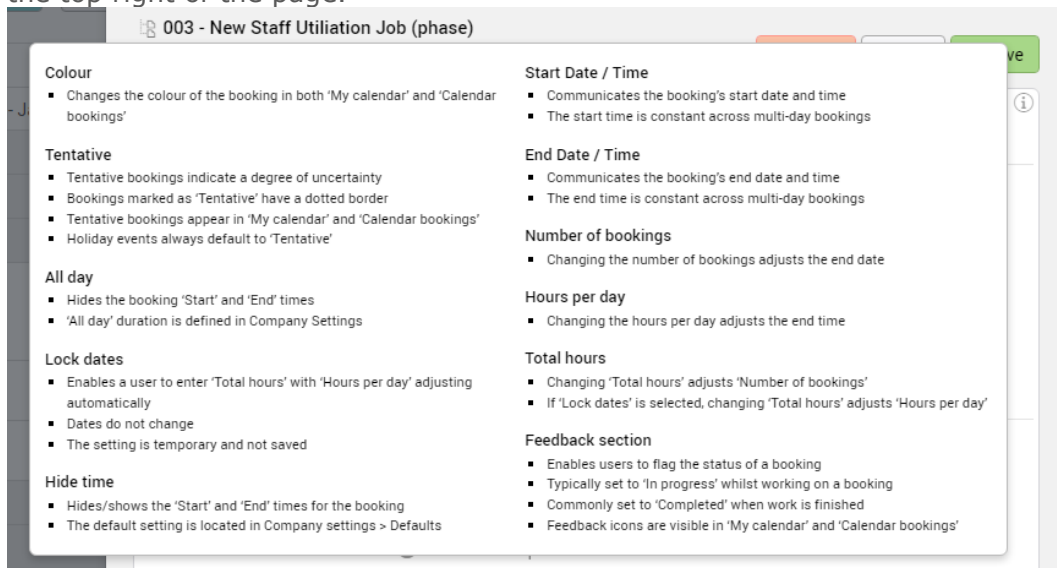
If OOO is set on a day the thermometer will display in grey. Like the other thermometers, they increment by 10% so if it is set to be OOO half of the day, 50% of the thermometer will show grey and if the full day is set to OOO the whole bar would be a solid grey.

Display amount of time overloaded by in thermometers (10043)

If overloaded, the number will now show the amount overloaded by as a negative number within the thermometer. Before, if overloaded the value would be zero with a red background. This now allows the specific amount of overloading to be clearly seen.

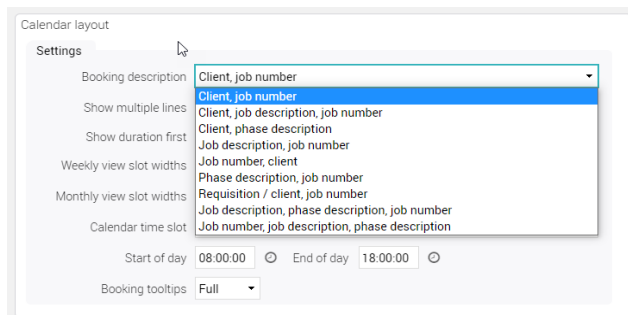
Information tooltip in calendar booking input screen (9506)

To give a better understanding of what each field does within the 'Booking input' screen, an information tooltip has been added. This can be seen below by hovering over the 'i' in the top right of the page.



Additional booking descriptions in calendar preferences (9042)

Calendar layout settings within calendar preferences have had some extra booking descriptions added. Making the text in the jobs more suited to different users who require information they may not have been able to see before. Below are the display options now shown in the drop down.

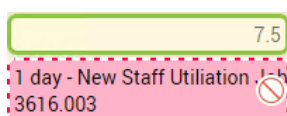


Improved requisition search (9136)

The requisition search will now include queries for requisition subject and requisition details.

Cancel feedback option added to booking details (8275)

A new cancelled option has been added within the feedback selection in booking details. When cancelled is selected the time which was allocated to this booking is no longer accounted for in the Loading View. As shown below, the booking is still visible, but it will have a cross emblem within it to the right.



Improvement to notes saving on events in MyCalendar (10252)

Previously if the user added notes to an event within MyCalendar, then selected a different event, the notes you have just added would also then be added to the event you have just switched to. Now the notes will just stay within the event you intended them to be in no matter how many events switched between.

Charge code added into requisitions grid and booking details (10246)

Charge code was not easily viewed in the requisitions, so a new column in the requisitions grid within calendar bookings has been added. Within booking details, when a user drags a requisition onto the calendar booking grid, a charge code editable drop down has now been added to make it easier to amend or add a new charge code.

Start date added to requisitions tooltip in calendar bookings (10406)

Start date has been added into the tooltip on a requisition on calendar bookings. The user can now see the start date and the due date.

Charge code and hours added as columns within requisitions list (9877)

Charge code and hours have now been added to the requisitions list at the bottom of the calendar bookings page.

Attachment section breakdown (6642)

Option added into the attachments section within a selected booking in MyCalendar and calendar bookings to breakdown the attachments in the list by type. For requisition booking types, the selection in attachments will default to requisition, and for non-requisition types the selecting will default to all.

Estimate and requisition list column improvements (10398)

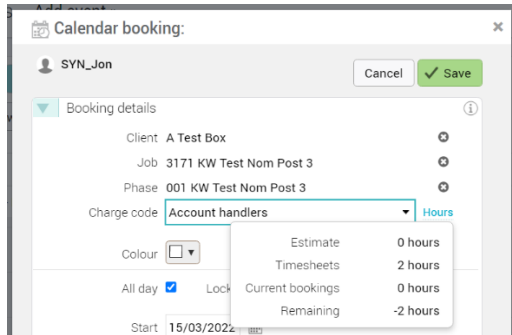
In the calendar booking screen improvements have been made to the estimate and requisition lists. The column widths are now changeable, and the ordering can be changed by dragging the column from the header to its desired position. In the list preferences a button labelled 'Reset columns' has been added, this will reset all column changes back to their defaults.

Ability to copy and paste a booking in calendar bookings (10460)

In calendar bookings the ability has been added to copy and paste bookings. Start by right clicking on a booking and selecting 'Copy to clipboard' then right click in an empty slot and you will have three options: 'Paste copied booking', 'Clear clipboard' and 'Dismiss'. You can paste the copied booking as many times as you want, and it will stay in your clipboard until you select 'Clear clipboard'. 'Dismiss' is used where the user right clicks and wants to get rid of the right click menu, but still wants to retain the copied booking in the clipboard left clicking anywhere in the screen will also do the same.

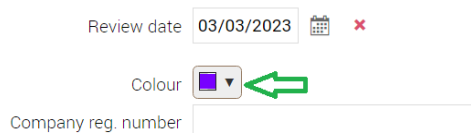
'Hours' tooltip added when adding a booking (10459)

When a user adds a new booking in calendar bookings, a new tooltip has been added labelled 'Hours' and is visible once a charge code has been selected. As shown below it will show the hours for estimate, timesheets, current bookings and remaining for the selected charge code. The 'Hours' tooltip has also been added into the top left of the screen when an existing booking is opened and when a booking is selected in MyCalendar.



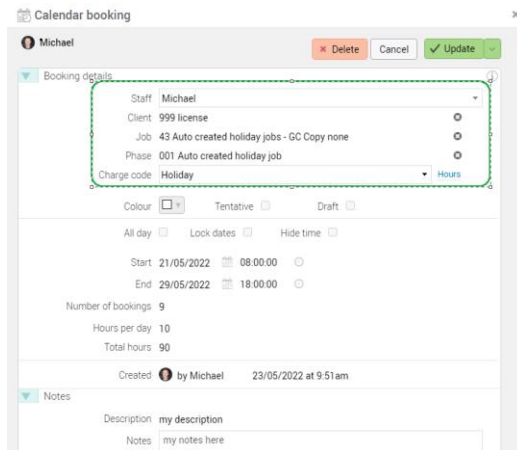
Allow colour coding for clients to show in calendar bookings (10086)

A new dropdown has been added into the client record details screen. When set, the selected colour will be used as the background colour for bookings shown on the calendar bookings screen for the client.



Change job/phase/stage feature (10561)

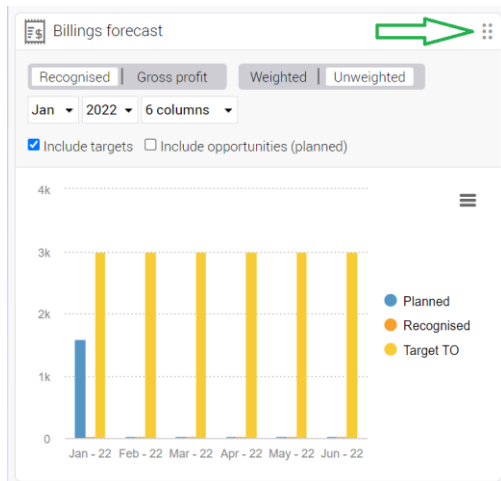
By right-clicking on a calendar booking a new option is now available to change certain fields of the booking. It is now possible to change the assigned person, job, phase, stage or charge code. Once the required changes have been made, it is possible to just update the current booking or to also update all future matching bookings with the same changes as well.



Dashboards

New ability to rearrange panels in dashboards (9902)

The ability has been added to rearrange the order of the panels in the dashboard by clicking the interactive dots in the top right of the panel and then dragging them to the desired order on the screen. Whenever there are dots in the top right the panel can be rearranged, as shown in the image below.



Ability to display data viewer views in a dashboard (10181)

The ability has been added to go into data viewer, select a view and then add this view to a new type of dashboard by selecting it in the drop down. To achieve this, select 'Data viewer' under 'Reports', select the view to add to dashboards, then select the views drop-down and scroll to the bottom and select 'Save/delete views' under the maintain views heading. In the popup the user can name the view and by selecting the 'Display on dashboard' checkbox, it will allow the choice of which dashboard type is wanted on this view.

Dashboard calendar summary additions (9466)

Within calendar summary on the dashboard, a new filter has been added for 'Next week' next to 'Today' and 'This Week'. A quick link button to 'MyCalendar' has also been placed in the panel for speedier navigation.

Colours improved within 'At a glance' dashboard (9767)

The colours within the 'At a glance' dashboard panel have been altered to be slightly brighter and less washed out, making it much easier to read.

Notes as tooltips for 'At a glance' items (9434)

Views now have a 'Notes' field added so a description can be added. This can be seen by hovering over the view name on the dashboard to show an explanation of the view to select.

Targets and orders dashboard improvements and new name (9770)

The 'Targets and orders' dashboard has been renamed to 'Targets and jobs'. Additional options have also been added. If invoiced is selected it will make the following available to select: turnover (invoiced), recognised, gross margin and net margin. The following can be selected from choosing promoted: turnover (quoted), gross margin (estimated) and net margin (estimated).

Job and phase dashboards now save independently (10276)

Job and phase have their own dashboards, but their panel ordering was shared. Now the saving of the panel order is independent. So, changes to one will no longer affect the other.

New panel in the sales dashboard called 'Average spend by sector' (9799)

The 'Average spend by sector' panel is positioned to the bottom right in the sales dashboard. The period drop down allows a selection between three, six and twelve month rolling averages, these each allow a selection next to it of 'Value' or 'Percentage'. On the chart the orange bar symbolises invoiced, and the blue bar symbolises gross profit.

Label changes (8633)

Anywhere that previously showed 'Charge hours' now shows 'Chargeable hours'. 'Non-charge hours' now shows 'Non-chargeable hours'. There are colour changes within the panels, so the colours are now consistent across the dashboards.

Preference added to control estimate line within capacity chart (10537)

As shown below a new preference has been added in the booked vs capacity graph within the scheduling dashboard. This controls if the estimated line is shown or not. By default, this is turned off, enabling this will display the estimate line again.

Booked vs Capacity preferences

Company: The Professional Services Company ×

Staff team: Andy Team ×

Type: Real ×

Display estimated

Include opportunities in estimated

Weighted

Cancel Save

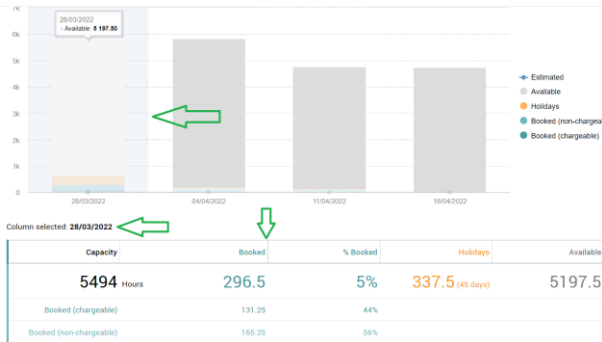
Capacity & feedback dashboard 'Scheduling dashboard' (9898)

A new dashboard screen has been added called 'Scheduling dashboard'. This can be found by selecting dashboard on the main selection on the left and then choosing scheduling at the top of the dashboard screen. The screen has three main areas - a chart to show the booked vs capacity, below the chart you get a visual of the data that powers the chart and then a feedback status which shows a quick to read view of the status of bookings from the selected period.

The booked vs capacity section allows the user to choose the date to start from, number of columns ranging from 3-12 and the amount of time the columns represent (days, weeks or months). In the preferences to the right of the chart there are further selections. There is a multi-select for company, staff team and type. The display estimate tick box allows the user to select if they want to see the estimated line in the chart. Then the user can select in the tick boxes whether to include opportunities in the estimated line with the option of applying the opportunity weighting. The chart shows the following time in hours: available, holidays, booked (non-chargeable), booked (chargeable) and the estimated line. To the right is a key to show what each colour represents and if any of these items are clicked it will make them disappear/reappear in

the chart. A line representing total estimated time for the period is also shown on the chart. Historic estimates will not be included if the jobs are closed, or estimates marked as complete. If timesheets are posted, the remaining future estimate spread is adjusted.

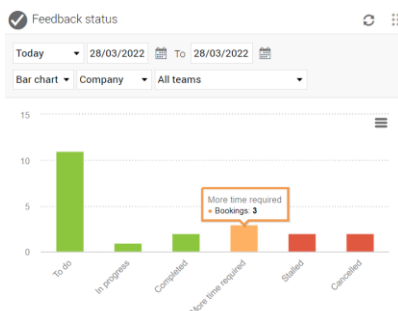
As shown in the image below, if a column is selected the grid underneath the chart will display the hours for that time period in more detail.



Below this is the grid to show the data that powers the main chart at the top. Within this the user can select to display this by team or by individual staff resource, with the ability to search within this.

Team	Capacity	Booked	% Booked	% Booked (charg...)	% Booked (non-c...)	Holidays (days)	Available
Print1	60	0	0%	0%	0%	0	60
Studio (S)	195	0	0%	0%	0%	0	195
Support	152.5	0	0%	0%	0%	0	152.5
Test Requisition ...	37.5	0	0%	0%	0%	0	37.5

The feedback status panel (shown below) displays the status of bookings in a quick and easy view. The different options to choose from are: today, yesterday, last week or last month, to and from date selection, display type of bar or pie chart, option for choosing to display data for company, my team or current user and finally a drop down for teams. The statuses displayed in here are set by opening a booking and setting the feedback status by selecting one of the face options.



Clients and jobs

@ Mentions added to job, phase comments and Synergist documents (9079)

The ability has been added to tag people with @ mentions in job, phase comments (not description fields) and in Synergist documents. This will email the tagged person to notify them of what they have been tagged in.

Ability to add embedded images into job and phase comments

Users can now add embedded images into the comments of jobs and phases.

Client SO and Sales Order tabs renamed to Sales Orders (9818)

Client SO tab in a client record and Sales Order tab in a job record have both been renamed to Sales Orders.

Job & phase lists have thermometers column added for client and project records (9175)

Thermometers have now been added for client and project records in the jobs and phases tabs. A choice of which thermometer to show is available in the column header.

Filter by tax code on client list (9093)

A new filter by tax code dropdown has been added into the 'More filters' section within the client area. The drop-down contains the list of tax codes and once applied will then filter the client list according to the tax code selected.

Capability to add review date / notes to client prices (8961)

Review date and notes have been added to client prices (shown below). This adds the ability to make it easier to track special price reviews. This date has also been added as a filter if you select 'filter by date' using 'price review date'.

Name is now a required field (6952)

'Organisation name' within clients and 'Name' within suppliers have now been made a required field thus ensuring this is always entered.

Auto generate monthly phases added to phase wizard (6631)

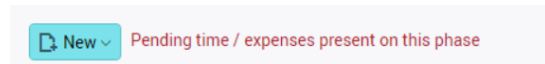
Phase wizard within jobs has had auto-generate monthly phases added into it at the bottom of the screen. A user can now create a set of monthly phases based on an initial phase. This will duplicate the estimate within each phase from the original estimate.

Extra filters added to invoice list (8938)

The ability has been added to filter the invoice list by a job, phase, job level and phase level.

Message 'Pending time/expenses present on this job' moved to top of screen (9973)

This message was previously shown at the bottom of the page within jobs making it difficult for anyone to notice it. This has now been moved to the top of the screen next to the 'New' button (example below) to make this much easier to see if displayed.



Drag and drop sorting added to schedule tab in phases (9283)

In the 'Schedule' tab within a phase the order of items in the grid can now be changed by clicking on an item and dragging it either up or down. This changes and resets the 'Phase/Seq' column in the grid automatically after letting go of the item after dragging.

Grid in allocated costs on a selected invoice tidied up (9255)

Supplier and description columns within the allocated costs grids have had a max width applied to them to ensure correct spacing of the columns. If these columns need to show more information, the three dot ellipses will appear to the right of the text within it.

New tooltips for linked records within invoices (9105)

At the top of a selected invoice, you can now hover over the job link to view its linking information without having to click into it. See below for an example.



Inactive column added to client / supplier exports (9547)

'Inactive' column has been added to export organizations on the client list and in export suppliers on the supplier list.

Drag and drop grid ordering added to phases in job (5974)

Drag and drop ordering has been added into the 'Phases' tab on a selected job. This speeds up re-ordering and removes the manual process of assigning a number to each phase to reorder them.

Batch invoice emailing (7077)

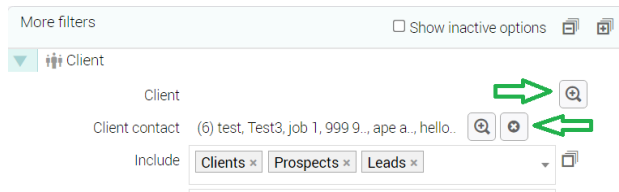
An email button has now been added to the top right of the invoice list page. This will allow the user to email batches of invoices or a single invoice. Clicking the 'Print' button with invoices selected will complete the pre-flight checks to ensure there are no warnings or errors, then it will go to the batch invoicing email screen where the email can be reviewed before being sent. This supports sending to one or more contacts and is integrated with Microsoft 365.

Billing plan view pre-set range filter (9312)

A new filter setting has been added called 'Use pre-set date range'. It is located by selecting the 'Options' drop down in a list, selecting 'Filter' then looking under the heading 'Job & phase'. This will filter the billing plans list showing jobs using the selected pre-set.

New easier functionality for popup selection lists in filter selections (9611)

Clients, jobs, phases and supplier lists now have easier functionality in selecting and de-selecting items which use the selection pop-up screen. Previously after selecting the items in the pop-up screen, they could only be removed by removing all selections. Now once the selections are made, they can be removed by using the "x" button as shown below.



'New' dropdown selections wording change in estimates within phases (9541)

To be consistent with previous versions, the wording in the 'New' dropdown in the 'Estimate' tab within a phase has been changed. It now contains the following options: time estimate, material estimate, purchase estimate, expense estimate and tender.

Quick estimate charge code type changed to multi-select (9056)

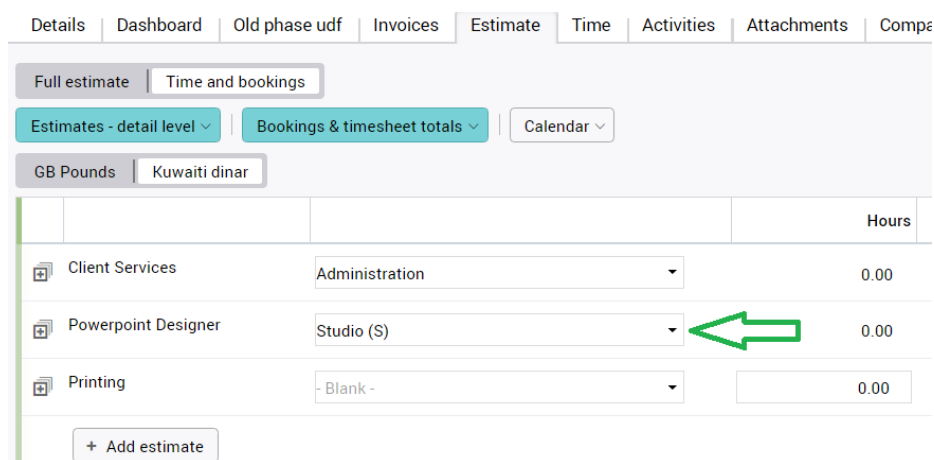
When selecting the 'Quick estimate' button in the 'Estimate' tab within a selected phase, a filter at the top of the page has been changed. The 'Charge code type' dropdown has now been made multi-select.

Improvement to supplier selection when creating purchases (5639)

Previously when taken to supplier selection from certain pages, such as creating a purchase order on a phase, the user is taken to a page where a button must be pressed to bring up the supplier selection popup screen. This has now been improved so that the supplier selection screen will appear straight away with no additional click. The areas this has been improved on are when creating new purchase estimates, expense estimates, purchase orders, direct expenses, purchase invoices and purchase write-offs.

Resource team selection on estimate time & bookings (10055)

On adding, editing and displaying an estimate as shown below, there is now a dropdown in the grid where the user can select a resource team on each row.



Systems / Settings

Microsoft single sign on (SSO) integration (10360)

Microsoft single sign on has now been implemented. When enabled it will force the whole organisation to start using Microsoft credentials to sign in place of Synergist credentials. To enable this setting the 'Microsoft SSO enable' tick box (shown below) is in Utilities > System Parameters > Settings within the heading 'Passwords/Access'.

Single sign-on (SSO)

Microsoft SSO enabled

Once enabled and a new session is started, the Synergist welcome screen will change to show a 'Sign in with Microsoft' button and an 'Admin portal' button (shown below). Clicking the Microsoft sign in button will open the Microsoft sign in screen. Entering the correct Microsoft credentials will then grant the user access into Synergist. For the sign in to be successful the user email needs to be the same in the Synergist account created by the admin and the Microsoft account used to sign into Synergist.



If the email used does not match up to a user in Synergist, then the following error will appear 'No Synergist users exist with the email of the Microsoft account: There is no Synergist account with this email address.' The user will also get errors for the email being registered to more than one Synergist account and if the account has already been paired to a Microsoft account.

If the Microsoft SSO needs disabling or if there are any issues admin can login using the 'Admin portal' button. This will allow an admin to sign into Synergist using their Synergist login details instead of the Microsoft ones. If a user attempts this and they are not an admin, a message will appear warning them and their login will be denied.

Core menu permissions split out (9717)

The permissions of the menu selections on the left-hand side have been separated. Now a User can have access to activities without having access to core menus, but the activity permission will still need to be set.

Ability to add team members in teams (8864)

Users can now be added to a team within 'File maintenance' by selecting the team and using the new "Add" button. This will open a new pop up where you can add one or several names at once.

Warning added to max PO in purchase order restrictions section (9713)

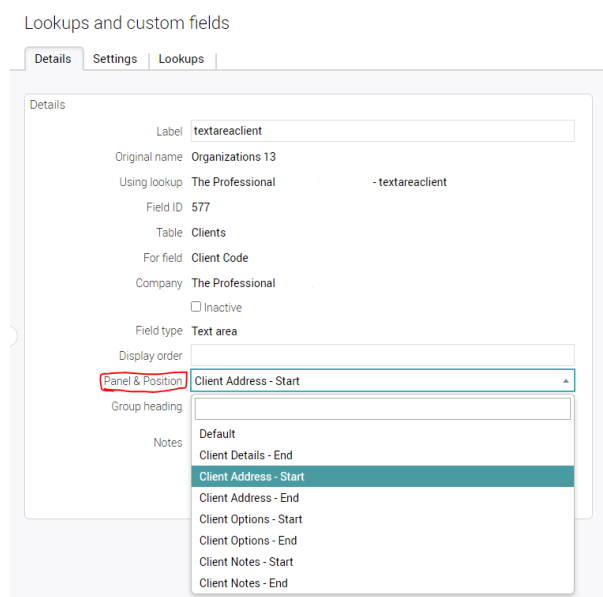
The warning has been added in red stating, "Value of 0 means there is no maximum" under 'Purchase order restrictions' when a user is selected in 'File maintenance'. This is to warn users what zero means for that selection to ensure no mistakes are made.

Tax code 0 can now be made active / inactive (9062)

Tax code 0 within 'File maintenance' has had the Inactive check box enabled, this tax code will now be able to be made active or inactive. This check box was previously disabled meaning this tax code was always active with no way of disabling it.

Position custom fields into different panels in the details tab (10427)

The ability has been added to move the positioning of custom fields into different panels within the details tab of the following forms: Client, Client contact, Supplier, Supplier contact, Job, Phase and Activity. This feature is controlled by a dropdown called "Panel & position" within File maintenance > Lookups and customer fields (Shown below).



Copy "Not a handler" setting when copying a user (10457)

When a user is copied from "Users" in file maintenance it will now also copy over the setting "Not a handler".

New 'Team skills' tab added in staff record (10047)

In a staff record selected through 'File maintenance' a new tab has been added called 'Team skills' and the tab previously called 'Skills' has been renamed to 'Resource skills'. This makes the teams skills more visible, as before they could only be viewed through charge codes.

Forced multi-factor authentication (8813)

A new drop down called 'MFA policy' has been added in 'System parameters' to control if multi-factor authentication should be forced or not. 'Optional' is where it is up to each user if they want to use it; 'Remind user' is where it displays a pop up reminding the user to set up multi-factor authentication; and 'Mandatory' forces the user to set up multi-factor auth by removing all menu options and displaying a pop up explaining this must be set up, which takes them to the 'Preferences' user screen. To set up the authentication, click on the user icon > preferences > Generate MFA code.

Multi-factor authentication

Allowed methods

MFA policy

The Mandatory MFA policy option is only available to users with MFA.

Set sales statuses as inactive (10239)

Statuses can only be deleted if they have not been used on a job record before. Because of this the ability to mark a sales status as being 'Inactive' has been added. This can be accessed in File maintenance > Sales statuses. A check is also in place where if the sales status is set as default, then it cannot be marked as inactive. To mark inactive in this case the user would just have to first mark another sales status as the default.

Prefix codes to allow alpha-numeric only (10410)

Prefix codes such as 'Job prefix' in client settings no longer support special characters. If a user attempts to enter a special character, the system will not allow it and will display a message below the box saying 'Characters not allowed', until a valid character is inputted. This change does not alter existing prefix codes, just new ones or ones that are edited.

Setting for handler targets instead of client targets (8186)

Handler targets is a new option instead of using client targets. New users will have this switched on automatically, but existing users can enable this setting to start using handler targets. The new 'Use handler targets' option (shown below) can be enabled in Utilities > System parameters > Settings.

Misc

Date entry leeway in months

Timesheet timer rounding

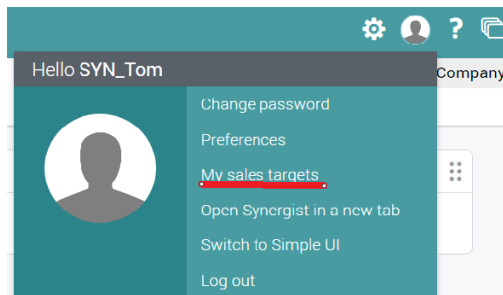
Queued tasks timeout

Use handler targets

With this option selected the target dashboard will now be updated to show the values for handler targets instead of client targets. The option tab 'Target' will also be removed from the client page when this option is selected.

Specific handler targets can be set within File maintenance > Handler targets and then selecting an employee. Select 'Create or apply targets' in the 'Actions' dropdown to create or apply targets to an already created year/type. As shown in the image below there are three options; 'Create 12 periods' creates a blank row for each month of the year; 'Spread evenly over the year' divides the numbers entered by each month in the year and adds it to the grid; and 'Apply to each month' will place in the specific values the user defines for turnover, gross margin and net margin. If the year and business type is already created, then this screen will then apply these new targets to the months in that year.

Another place the user sales targets can be added is by ensuring 'User can set their own sales targets' is ticked in a user selected in File maintenance > Users. This will allow the user to select their profile image and select 'My sales targets' as shown below. Within here targets can be created and updated.



Financial period type selection added in company settings (9110)

As shown below a new drop down has been added into the periods tab within company settings on a selected company. This allows the user to set the financial period type to either monthly or non-standard. When creating new companies this will be set to monthly by default. On upgrade for existing companies a routine will be run and if all the selected periods are monthly then this setting will be set to monthly, if not then it will be set to non-standard. When set as monthly financial periods can only be set up for either the start or end of the month and one month period allowed on save only. The default dates are also set to the start and end of the month in financial periods when creating a new period.

New user preference in file maintenance to control feedback alerts (10048)

Some additions have been made to control selected users feedback alerts in 'File maintenance'. A new multi select drop down has been added labelled 'Booking feedback alerts', with the three options creator, job/phase handler and phase owner.

Misc

Options

This user is NOT a handler

User category: Administrator

User can set their own sales targets

Calendar alerts

Booking feedback alerts: Creator, Job/phase handler, Phase owner

Data optimization & cleansing process added in utilities (9407)

This function is added to allow users to check all non-archived companies and the current company. The date range for cleansing can be altered then the user can select the options they require and can either export the results into a csv report or process the optimizing actions. The selections allow the user to select items to mark as inactive, hide items from the calendar and mark users as not a handler.

Data optimization & cleansing

Companies to cleanse

Current company - The Professional Services Company

All non-archived companies

Date range to cleanse

Created prior to: 24/09/2021

Not used after: 24/03/2021

Process items not used since the selected date

Select all

Mark as inactive

- Charge codes not used in estimates or timesheets
- Supply types not used on POs or Expenses
- Job types not used in new jobs
- Phase types not used in new phases
- Materials not used in estimates or timesheets
- Stages not used in new job schedules

Hide from calendar

- Resources not used in the calendar
- Charge codes not used in the calendar

Users

These options should only be selected if you are processing multiple companies or if you only have one live company

- Mark as 'Not a handler' if not used in new/modified clients
- Mark as 'Not a handler' if not used in new projects/jobs/phases

Report - Export CSV Cancel

New company setting 'Select recognise value as default' (9692)

New company setting labelled 'Select recognise value as default'. This is in Company settings, Codes tab, then scroll down in the Codes panel. When this is selected, and a new billing plan is created 'Recognise value' is automatically ticked and the value is set to zero.

Time and expenses

Ability to edit work done on posted timesheets (9791)

Once a time sheet is posted, the 'Work done' field is now editable for people who have the permission 'Reverse other user's timesheets'.

New daily timesheets screen to replace existing (9272)

A new screen has been developed to replace Daily Timesheets. The new screen with the same name will be combining several timesheet entry screens to save time and make it easier for the user to manage timesheet lists with combined search functionality. This can be accessed from the new Daily timesheets list and the 'Time' pages on jobs, phases and stages.

New 'Timesheet Approval' screen (9437)

A new 'Timesheet approval' screen has been added which will allow the opening of timesheet approval lists with additional filtering available and the ability to use views on the timesheet approval lists. This makes viewing timesheet approvals much easier especially with the addition of new filters and view abilities.

Processed sheets now shown by default in pending tab (10141)

Expense sheets with a status of Processed are now shown by default in the pending tab of a job or phase.

Copy pending timesheets (10220)

Pending Timesheets can now be copied from within the list. Below is an example of the button. If this cannot be seen as a column in the list, then it will need to be selected by going to Settings > Open column picker > select "Copy button".



Ability to jump into timesheet pending record from pending sub list (10208)

Jobs, Phases, Stages and Activity can now go to the timesheet pending record by clicking straight into a pending record in the 'Time' tab with 'Pending' option selected. An example of the list location is below, this one was from a job.

The screenshot shows the 'Time' tab for 'News-letter re-design' with the 'Pending' sub-tab selected. A table displays the following data:

Phase	Staff	Charge code	Date	Work done	Day	Evening	W/E	Total	Status
001	Colum	Alter	11/01/2022			3		3	Unsubmitted
002	Colum	Artwork & Direct...	12/10/2021			1		1	Unsubmitted
Grand total						4		4	

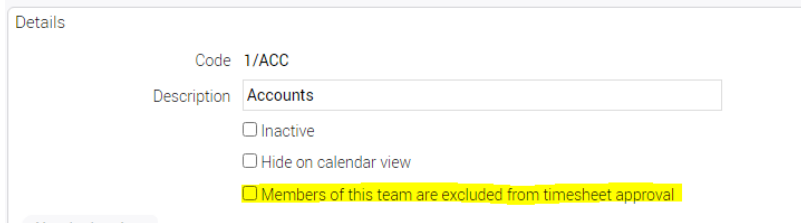
Pending timesheet / timesheet approval column picker (10397)

The status buttons column has been made mandatory within both screens to ensure proper functionality. The copy buttons column within pending timesheet has been made

to appear by default, however as this is not mandatory it can be deselected/reselected to suit how the screen is being used.

Bypass timesheet approval for specific teams (10405)

Previously, once timesheet approval was enabled for a company it applied to all users of the company. Now, a new feature has been added (shown below) located in a team selected within File maintenance > Teams. With this enabled it will now bypass the need for timesheet approval and will show 'Post' instead of 'Submit'.



'New' dropdown within expenses made scrollable if many options (9024)

When the 'New' dropdown is selected within expenses a scroll bar will now appear if there are more than 15 options in the list to select.

Reports

Show separate billed in period profit (9529)

A new check box has been added in the period profit report called 'Separate billed and written off costs'. When ticked this will add in three extra columns in the exported report, these are, 'Total time billed', 'Tot materials billed' and 'Tot purchases billed'. This is powered from the current process of ticking costs as either 'bill' or 'W/O' on allocated costs.

Chart button added to data viewer in saved reports (8259)

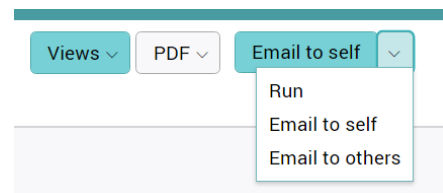
When a report is run with 'Table with chart' selected, a table is created at the bottom of the screen. Now in this table when you hover over a column header a button labelled 'Chart' appears and when selected, it will redraw the graph below to show the selected data from the column.

Drag and drop added to data viewer (10119)

The 'Data viewer' screen under 'Reports' header has now been improved with the addition of drag and drop in the lists when there is more than one record. This replaces the previous method of clicking on a record and using the up and down buttons to reorder the list.

Email for standard reports (9726)

Email is already available for saved reports and now this functionality has been made available for standard reports. As shown here, there is now the selections to email to self and email to others. Email to others will open the email screen used for saved reports and email to self will send the email straight away without any further actions needed. PDF or CSV are the two available formats. The user must choose the file type and then press to either 'Run', 'Email to self' or 'Email to others'.



Group report restrictions on saved reports (10493)

Saved reports will now restrict access to specific standard reports if the user's group has report restrictions configured. The only saved standard reports available to a user will now be ones that are configured for access in the group's report restrictions.

New standard report called 'Progress report' within quoting & estimating (8540)

A new standard report has been added called 'Progress report' within the quoting and estimating report section. This is a much simpler version of the 'Costs & quotes' report as it just shows estimated vs actual hours at job or phase level.

Updated layouts on some reports (9523)

The following reports have been updated to match our new look therefore making them much more readable, Job card with costs (quoted), Job card with costs (work done), Job card, Job cost summary (quoted), Job cost summary (work done), Phase card, Phase cost summary (quoted) and Phase cost summary (work done).

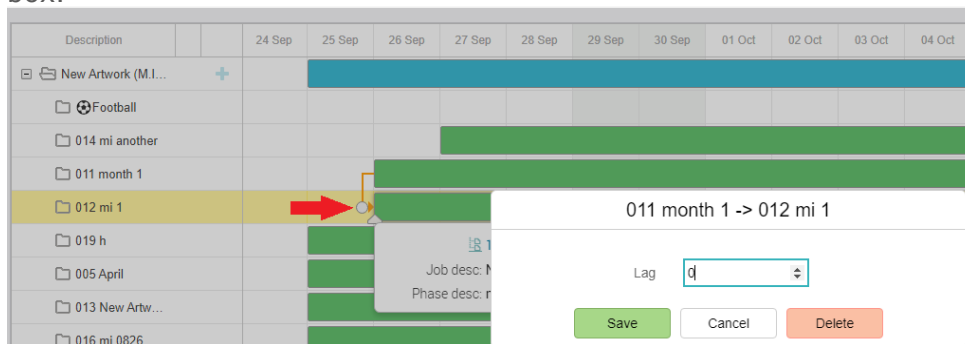
Gantt charts

Gantt charts additions (9556)

Phases and stages can be added directly through the Gantt by selecting the blue plus symbol within the description column. The descriptions can now be edited directly in the Gantt. It is now possible to access a multi-job Gantt from the job list, client card, project card and campaign card. The ability to move multiple items within the Gantt chart has also been added.

Gantt charts dependency edit or delete improved (9420)

Ability has been added to edit or delete the lag/lead link by double clicking on it. The place to double click is shown below with a red arrow which will then bring up the pop-up box.



Include certain activities on Gantt chart (8218)

Two new settings have been added into 'Activity types' from 'File maintenance' called 'Display on Gantt charts' and 'Milestone'. The milestone tick box is hidden until 'Display on Gantt charts' is selected. These options control showing activities in the Gantt. The start date of a milestone activity will always be the same as the due field. To control which activity types are shown in the Gantt chart a new button has been added to the top right of the Gantt screen called 'Preferences'. This allows the selection of 'None', 'Milestones only' or 'All' to choose the activities to include. Activities will show up on the Gantt chart in the selected activity colour and if no colour has been selected, they will be shown as grey.

Activities

New option to watch/un-watch activity when adding a comment (9931)

When a user adds a comment to an activity, there is now an option next to the 'Cancel' and 'OK' buttons which allow the user to toggle if they want to 'Watch' this activity or not. This will automatically default to watch when a new comment is added.

Loading an activity is faster (9709)

Some of the data calls have been combined and removed for when an activity is opened from the Activity list. This can result in a speed improvement of up to 40%.

Suppliers and purchases

Enhanced payment terms for suppliers (6107)

Functionality added to assign payment terms to a supplier. The due date on a supplier invoice will be updated following the payment terms rules. To achieve this, a new drop down has been added to the financial tab within a supplier record called 'Payment terms'. This dropdown will reflect the selection in the 'Day's credit' directly below the drop down (Example below).

Supply types	Contacts	Financial	Notes	Purch & Exp.	company purchase vi
VAT	3 (UK 20%) Special				
VAT reg no					
Markup method	Markup %				
Standard %	1				
Payment terms	30 Days				
Days credit	30				
	<input type="checkbox"/> Multi-currency				
Turnover	868.00				

Now when a purchase invoice is created against this supplier with the payment terms set, the 'Due date' in the purchase order details tab will be set from the selected term automatically.

Miscellaneous

User defined field notes as a tooltip on data entry screens (10317)

User defined fields (UDF) have a notes field which was previously not used for anything. Now the notes can be viewed as a tooltip within relevant data entry screens. Below is an example from within selecting an activity in the activities list.

The screenshot shows a data entry form with several fields: Contact (test), Team (Handler team), Owner (andy), Watchers (Andy Staff2), Logical (Yes/No) (checked), and Parent (Parent 1). A field labeled '10317 - test 8' contains the value 'ert'. A green arrow points to an information icon (i) next to this field, which has triggered a tooltip displaying 'Test notes' and 'Multiple lines'.

User details section added in user preferences (8848)

A new section has been added within user preferences called User details. This contains the following fields, email, phone number, mobile number, extension number, Facebook, Twitter, LinkedIn and Skype.

@Mentions in Synergist documents with email notifications (7355)

The facility of using @ mentions has been added in Synergist documents. When a user adds in an @ mention it will send an email alert to the tagged person with a link back to the document.

Adding merge fields from an activity into document template (9596)

In 'Document templates' within file maintenance, merge fields from an activity record can now be used.

Option to use external attachment storage for images in Synergist documents (9835)

Within Settings > Utilities > System parameters > Attachments, a new option has been added called 'Save images in Synergist documents as attachments'. When this option is set, images contained in Synergist documents will start to be stored as attachment files rather than being embedded as base64 within the document. This should improve the performance of opening documents with many images, particularly when using the Safari browser.

History changes for Synergist documents (10475)

When a Synergist document is opened and saved it will now show a history log showing user, date and time.

Dropdowns greyed out when blank is selected (9135)

As in the example below, when blank is now selected in a dropdown it will show slightly greyed out.

Pipeline	- Blank -
Rating	Rating 2
Source	- Blank -

Improvements to create email popup screen (9589)

The two instances of create email are client based and supplier based. Client based is called from quotes and invoicing. Supplier based is used for purchase orders. The main changes are the heading will show as 'Create client email' or 'Create supplier email', contact lists added which show contacts at the top and then internal staff, a Bcc field has been added, 'Message' is renamed to 'Body', if there are attachments selected or related to the job/PO you have selected these will show under 'Additional attachments' at the bottom (web attachments not currently supported) and finally the 'Create draft message only' option has been moved into the footer. Below is an example of a client email.

User defined fields (UDF) hidden and dependency field settings added (2810)

New field settings have been added for user defined fields found within File maintenance > Lookups and custom fields > settings. The first addition as can see in the screenshot below is the tick box field 'Hidden'. When this is ticked this field will be hidden unless one of the settings below overrides this. The option 'Show when dependent selected matched' will show the field if the 'Dependent on' and 'Dependent selection' find a dependency based off these selections. There is also a 'Display option' drop down which has three selections which may also override the 'Hidden' selection. The first option as shown in the image below is 'Normal', this will show the hidden field if it has data in. The second option 'Keep hidden status if data exists', will ensure the field is hidden even if data is present. Finally, 'Display only' will show the field but only a read only mode.

When 'Hidden' is not ticked the option 'Show when dependent selected matched' changes to 'Hide when dependent selected matched'. This makes the dependant selections work in the opposite way and will hide the field if the dependency options are matched.

The final setting added is 'Make mandatory when dependent selected matched'. This will make the field mandatory if a dependency is present based on these selections.

These settings also affect the grid filter options on the screens they are used. The filter field will only be hidden if it is set to be fully hidden in the settings otherwise it will be able to be selected in the filter even when it is only hidden in some scenarios.

Batch update is also affected by this change. If data is trying to be added to a hidden field, then the data will not be added. It will filter through each item checking the condition and exclude the hidden field updates.

User list option in user defined fields (8714)

New field types have been added into Details of 'Lookups and custom fields'. There are two new options labelled 'Users - all' and 'Users - handlers'. Within the 'Settings' area there is also a new selection added called 'User group'. If no group is selected, all users will be available for selection but if a group is selected the field will only list users who are members of that group.