synergist®

Version 12.4 - Release Notes

Synergist Browser Interface

September 2019

Synergist v12.4 requires 4D Server v17

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

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Contents

OVERVIEW - V12.4 RELEASE

Synergist v12.4 includes enhancements to existing features, new areas of functionality and interface improvements, all designed to improve usability.

Major features in v12.4

Integrations

Cloud integration

New cloud integration includes:

- Attachment integration with G Suite and Office 365 via API link attachment types
- Email integration
- PDF attachments for web-based email systems

Multi-user experience

Improvements to the way Synergist handles updates

Improved methods of updating records enables users to simultaneously view and edit the same multi-tab records.

Billing plans

Multi-job billing plan feature

The new Job/phase list feature enables users to switch to a view displaying multiple billing plans over a number of months. Billing plans may be accessed from the client card, providing access to billing plans for a single client.

In-line billing plan edit feature

Billing plans have a new in-line editable view.

Quick billing plan feature

The Quick billing plan feature enables users to create billing plans for a job or phase. It has advanced features for determining the distribution of values across plans and for applying the synchronisation settings.

Estimating & Scheduling

Time & bookings

With this new view of estimates, users can create new estimates on the fly, amend current estimates with in-line editing and create calendar bookings against estimates. The new view provides a useful indication of the amount of time booked against an estimate and the time remaining.

Calendar bookings

Create bookings from loading view

Users can create and amend bookings whilst in the Calendar loading view.

Option to show activities in Calendar

Requisitions can now be used as work tickets and optionally displayed in the calendar. From within the calendar, work tickets may be reassigned, and their dates modified.

Features supporting consultancy retainers

When using a retainer model, it is often a requirement to create block bookings of hours per day over long periods of time. The following features have been added to the Calendar bookings system to help support this way of working:

Monthly calendar view

Useful for booking and tracking bookings spanning several months.

Booking without time of day

Consultancies often book 'hours per day' rather than 'time of day' into calendars. If this way of working is preferred, it is now possible to hide the start and end times of a booking.

Custom labels

Certain field labels can be amended. For example, 'Handler' can become 'Project lead'.

Ability to timesheet a requisition

This feature is designed for companies who wish to assign work to staff without necessarily using estimates or creating calendar bookings. Requisitions can behave as work tickets, being assigned to a user and viewed on the Kanban board. The user can then create a timesheet directly from a requisition.

Spread loading calendar bookings

This feature allows the user to enter the 'total number of hours' and the 'hours per day'. As a result, it enables the system to find the 'end-date'.

Invoicing

ASBOF

Feature to deal with levies.

Reporting

Saved & Custom reports

The interface has been enhanced to handle reports saved at 'Company' and 'User' levels, and to filter 'Custom and saved reports'.

ACCOUNTS

Handling RR billed amount movements

Slight extension of nominal postings for handling RR billed amount movements

When creating RR (Revenue Recognition) or Write-off transactions, it was and still is possible to move billed amounts between jobs or phases of jobs. These movements could also give rise to a need for an equivalent movement of amounts between 'Sales nominal codes'. Previously, these transactions created postings that could not be transferred to the sales ledger of an accounting system because they weren't invoices or credit notes. The only option was to post a manual journal into the accounting system and delete these non-invoice/credit entries from the Synergist batch.

If the linked accounting system supports the automated posting of nominal journals, the new feature will turn these entries into nominal ledger entries rather than sales ledger entries.

PI option for export to Xero

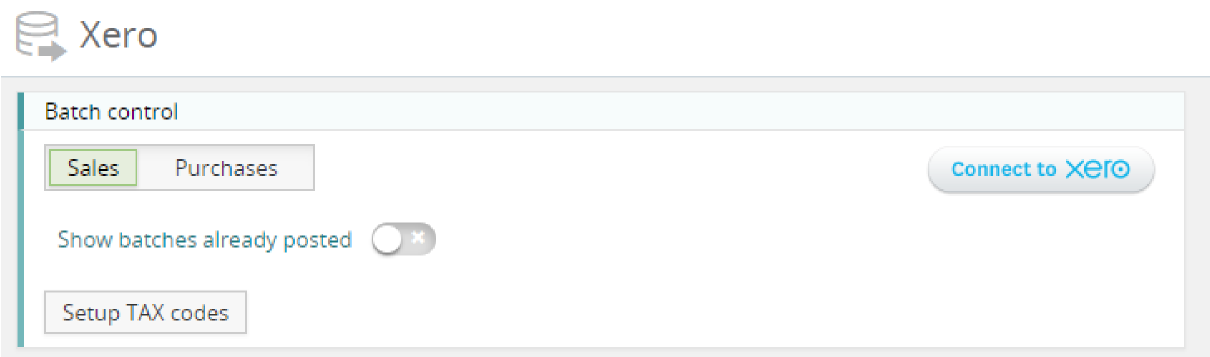
Purchase invoice export

Company setting added to include the job/phase number in the description for purchase export. The job phase number is prepended to the description when output to Xero.

Xero API - change to partner level App for cloud

Xero type

For cloud sites only, 'Partner' type has been added to the current 'Public' type, allowing a more permanent connection between Synergist and Xero, facilitating closer integration possibilities.

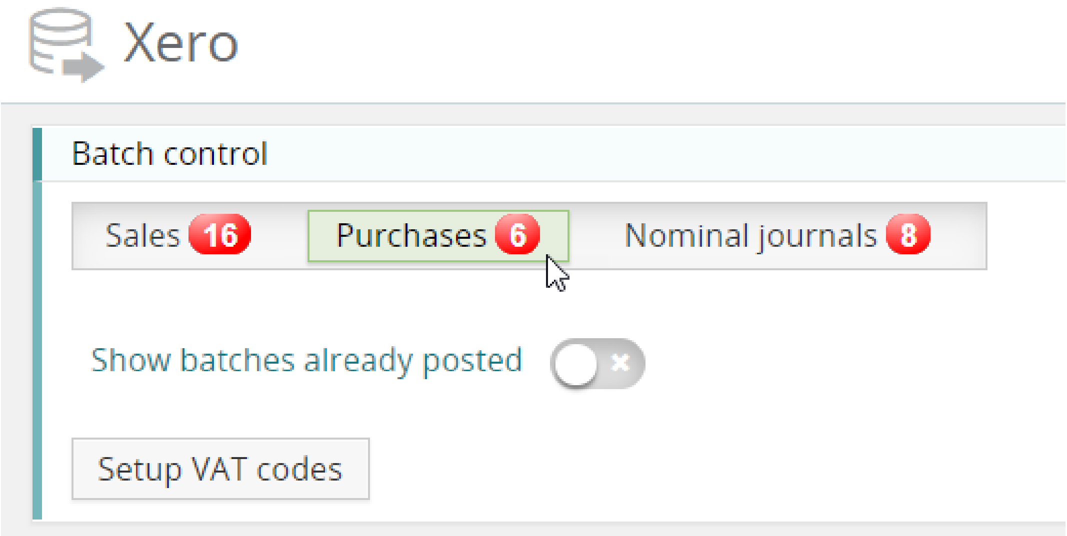


Xero - Purchase import feature

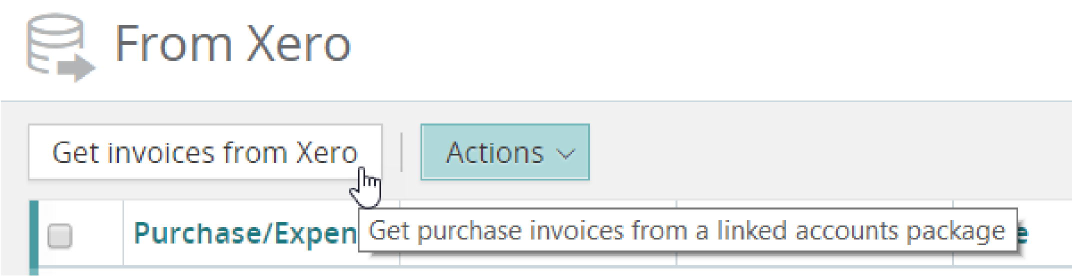
Xero users, using the Synergist cloud, can obtain a feed of purchase invoices into Xero from Receipt Bank, Data Molino etc. This new feature enables the data to be imported into Synergist via a link to their Xero system.

To access the link:

- Click the 'Accounts link' on the main menu. This link was previously called 'Accounts export'
- Select the 'Purchases' button

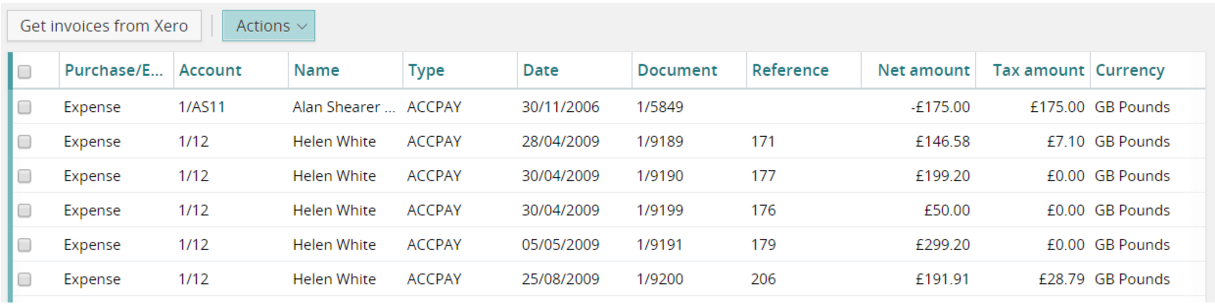


- Click 'Get invoices from Xero' to create a list of invoices for import



List of invoices for importing

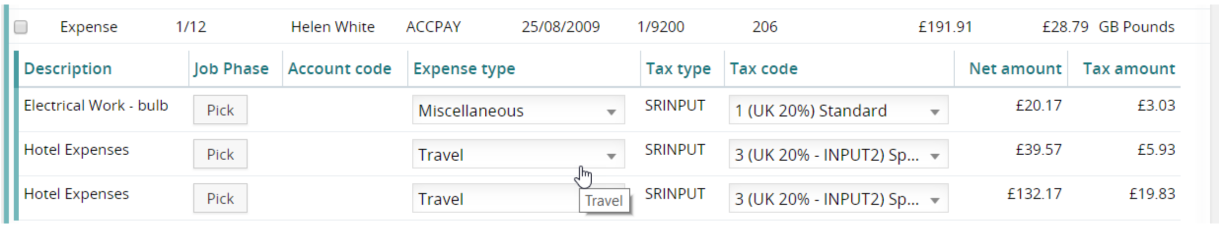
Invoices for importing are either 'Expenses' or 'Purchases'.



Purchase/E...	Account	Name	Type	Date	Document	Reference	Net amount	Tax amount	Currency
Expense	1/AS11	Alan Shearer ...	ACCPAY	30/11/2006	1/5849		-£175.00	£175.00	GB Pounds
Expense	1/12	Helen White	ACCPAY	28/04/2009	1/9189	171	£146.58	£7.10	GB Pounds
Expense	1/12	Helen White	ACCPAY	30/04/2009	1/9190	177	£199.20	£0.00	GB Pounds
Expense	1/12	Helen White	ACCPAY	30/04/2009	1/9199	176	£50.00	£0.00	GB Pounds
Expense	1/12	Helen White	ACCPAY	05/05/2009	1/9191	179	£299.20	£0.00	GB Pounds
Expense	1/12	Helen White	ACCPAY	25/08/2009	1/9200	206	£191.91	£28.79	GB Pounds

Expenses

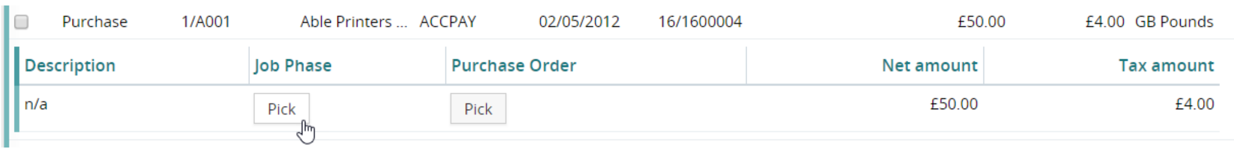
On clicking an expense, the expense lines appear below. These lines can be allocated to Synergist expense types.



Description	Job Phase	Account code	Expense type	Tax type	Tax code	Net amount	Tax amount
Electrical Work - bulb	Pick		Miscellaneous	SRINPUT	1 (UK 20%) Standard	£20.17	£3.03
Hotel Expenses	Pick		Travel	SRINPUT	3 (UK 20% - INPUT2) Sp...	£39.57	£5.93
Hotel Expenses	Pick		Travel	SRINPUT	3 (UK 20% - INPUT2) Sp...	£132.17	£19.83

Purchases

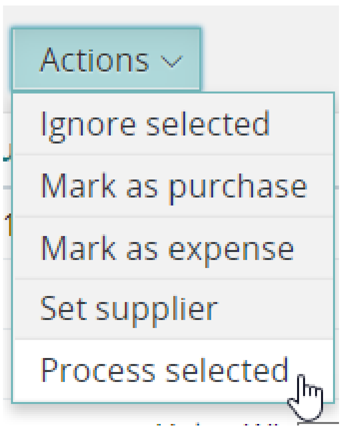
On clicking a purchase invoice, the user has the opportunity to allocate the invoice to a 'Job Phase' and a 'Purchase Order'. Purchase orders must already exist in Synergist.



Description	Job Phase	Purchase Order	Net amount	Tax amount
n/a	Pick	Pick	£50.00	£4.00

Processing

Once the records for importing have been correctly matched to expense types and purchase orders, the user selects the items for importing and clicks 'Process selected' from the 'Actions' button drop-down list.



ACTIVITIES

Activity details screen

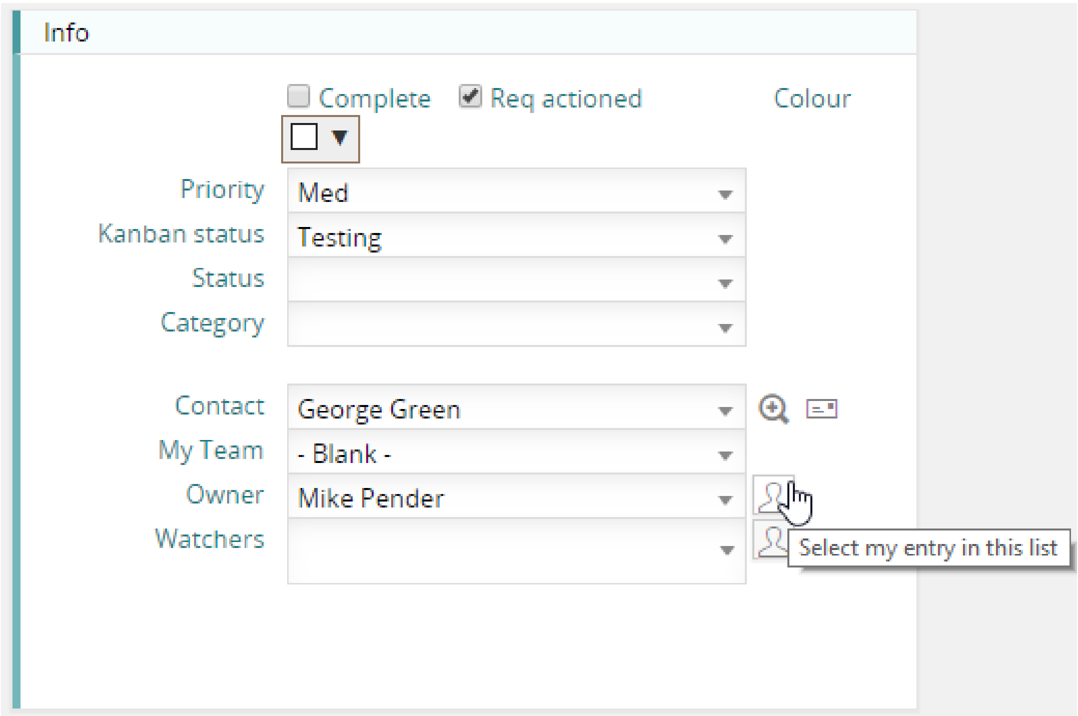
Amendments to the Activity > Details tab include:

- A new shortcut to set the 'Owner' of an activity
- A new field name 'Watchers' replacing the field name 'Others'
- Alerts set by 'Start' date

Shortcut to set the 'Owner' of an activity

A shortcut has been provided to set the current user as the 'Owner' of the current activity.

This is done by clicking the  button to the right of the 'Owner' field. If the activity record is a requisition, a second click sets the owner to the preferred person specified in the requisition section. A third click un-assigns the owner. Users may wish to leave the activity unassigned if their policy is to allow users to self-select requisitions as work tickets.

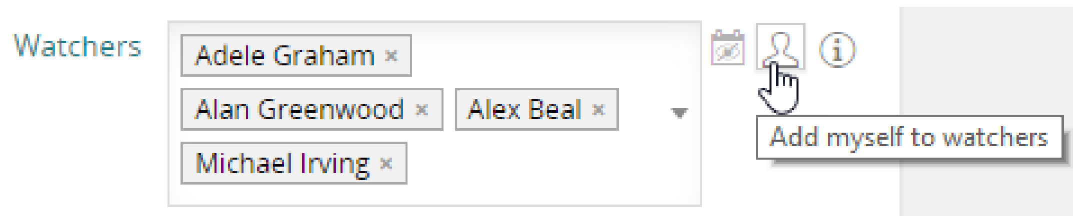


Field label 'Watchers' replaces field label 'Others'

The field label change makes the use of this feature clearer when activities are viewed in Kanban boards.

Button to add/remove the current user in the Watcher's list

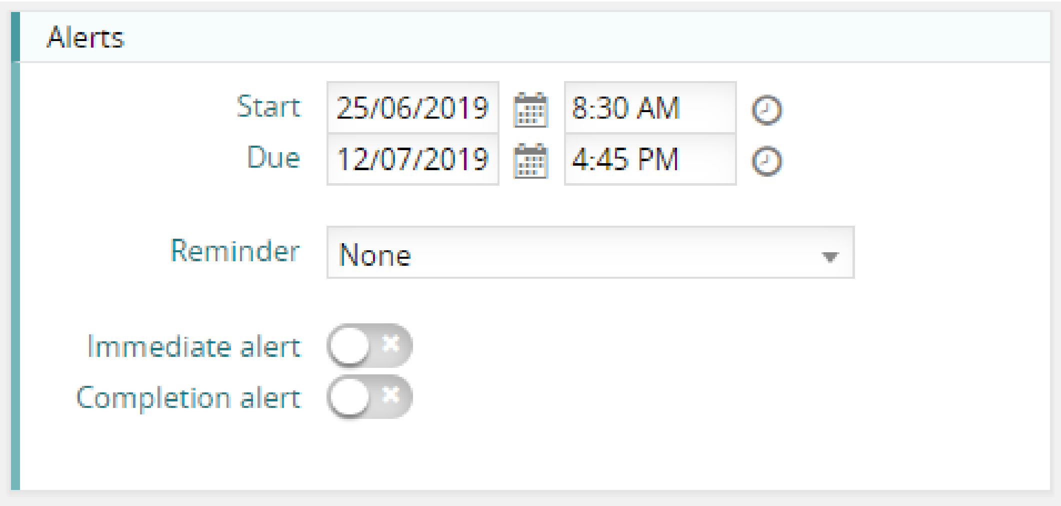
To add/remove other 'Watchers' in the list, use the drop-down menu and manually select/deselect their names from the list.



Alert - Start date and time

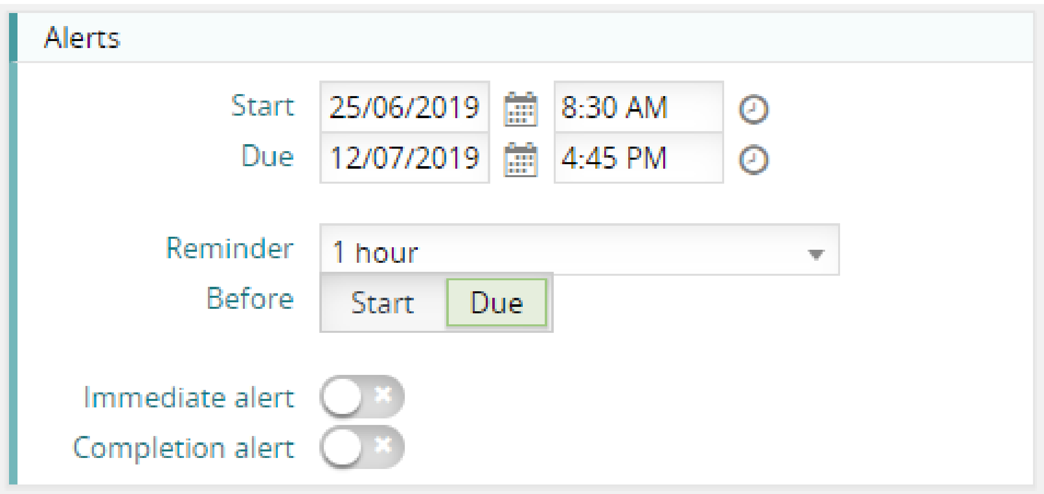
Alerts used to be only set by 'Due' date, but now they can be set by the new 'Start' date field, too.

The 'Reminder' field co-ordinates when a reminder is to be sent. The default setting is set to 'None' with no reminder being sent.



If the 'Reminder' is set to a value, for example 1 hour, 'Start' and 'Due' buttons appear. The buttons give the option of being reminded by 'Start' or 'Due' date/time.

In the example below, an alert will be sent 1 hour before the 'Due' date/time.



The 'Immediate alert' and 'Completion alert' functions remain unaffected.

New fields on Activity – Start date and start time

These new fields enable activities to be used in a wider range of circumstances. Requisitions can become work tickets with the option of appearing in user's calendars and Kanban boards.

Defaults for these new fields

New activity

Due date = today
Due time =10:00
Start date = today
Start time = 9am

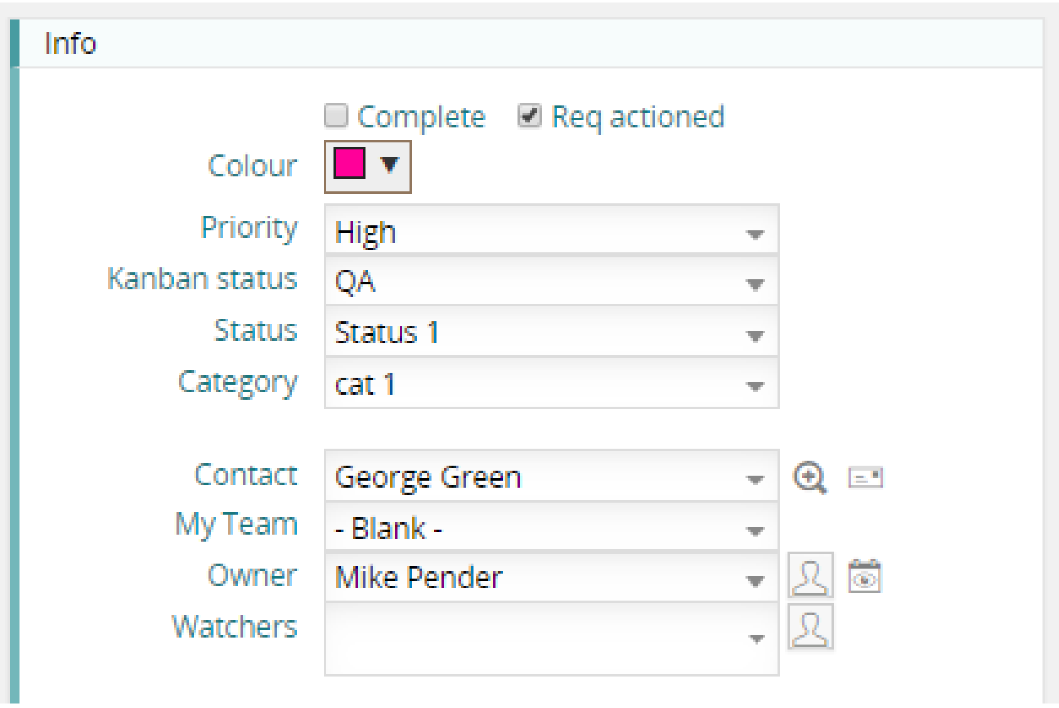
Existing activities

Start date = due date
Start time = due time - 1

Activities can be assigned a colour

This new colour field is used to colour activities when they appear in calendars.

Activity card



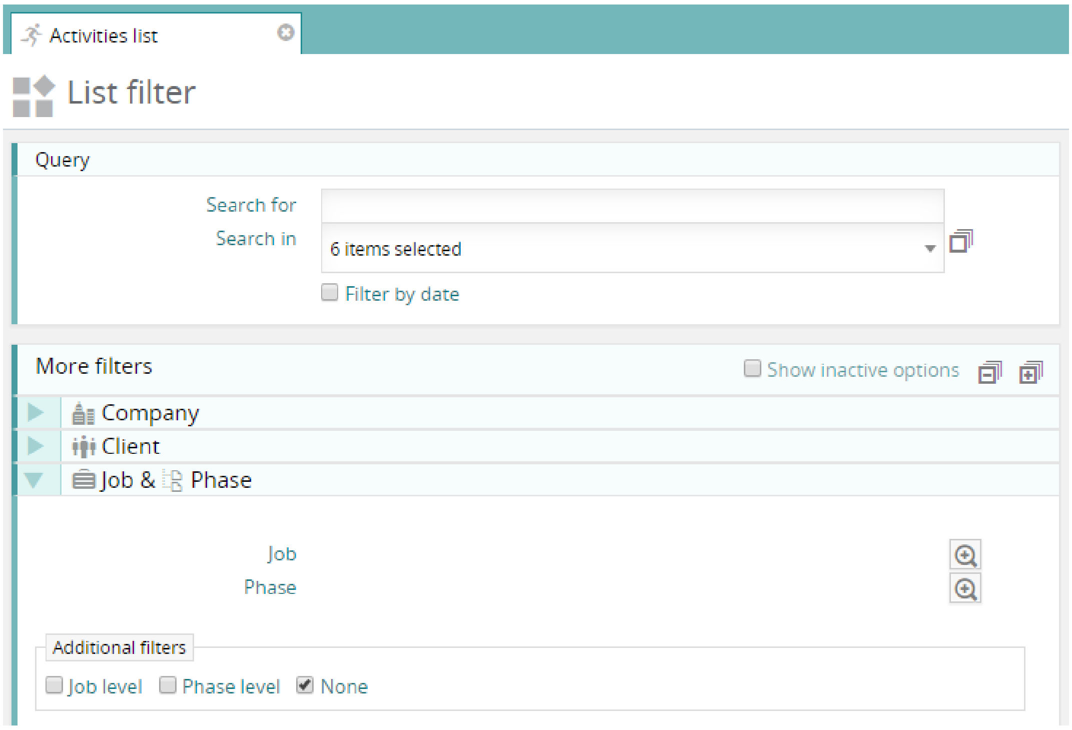
Activity list filter – Job and phase additional filters

To help filter the activity list, particularly when viewing in Kanban mode, 'Job level' and 'Phase level' filters have been added to the 'List filter'.

For example, the user may want to filter the Kanban board to only show requisitions for jobs of a specific handler.

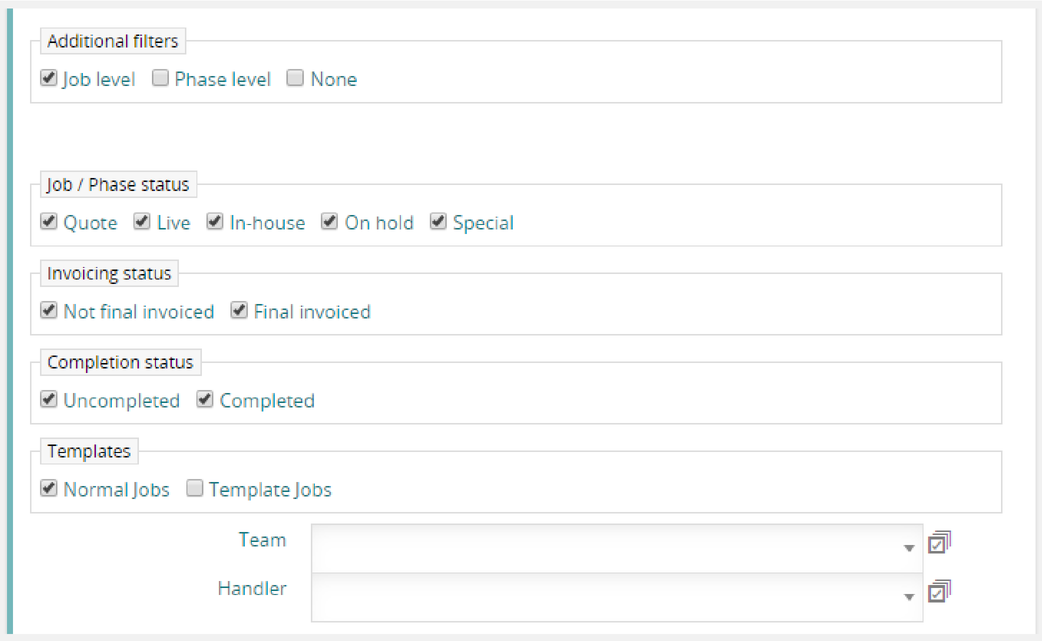
To access the 'List filter' and to view the additional filters:

- Navigate to the 'Activities list'
- Click the 'Filter' button
- Select 'Job & Phase'



(ACTIVITIES CONTINUED …)

Selecting either 'Job level' or 'Phase level' opens the drop-down menu of additional filters.



Complete the necessary fields and click the 'Apply filter' button before exiting.

Ability to timesheet a requisition

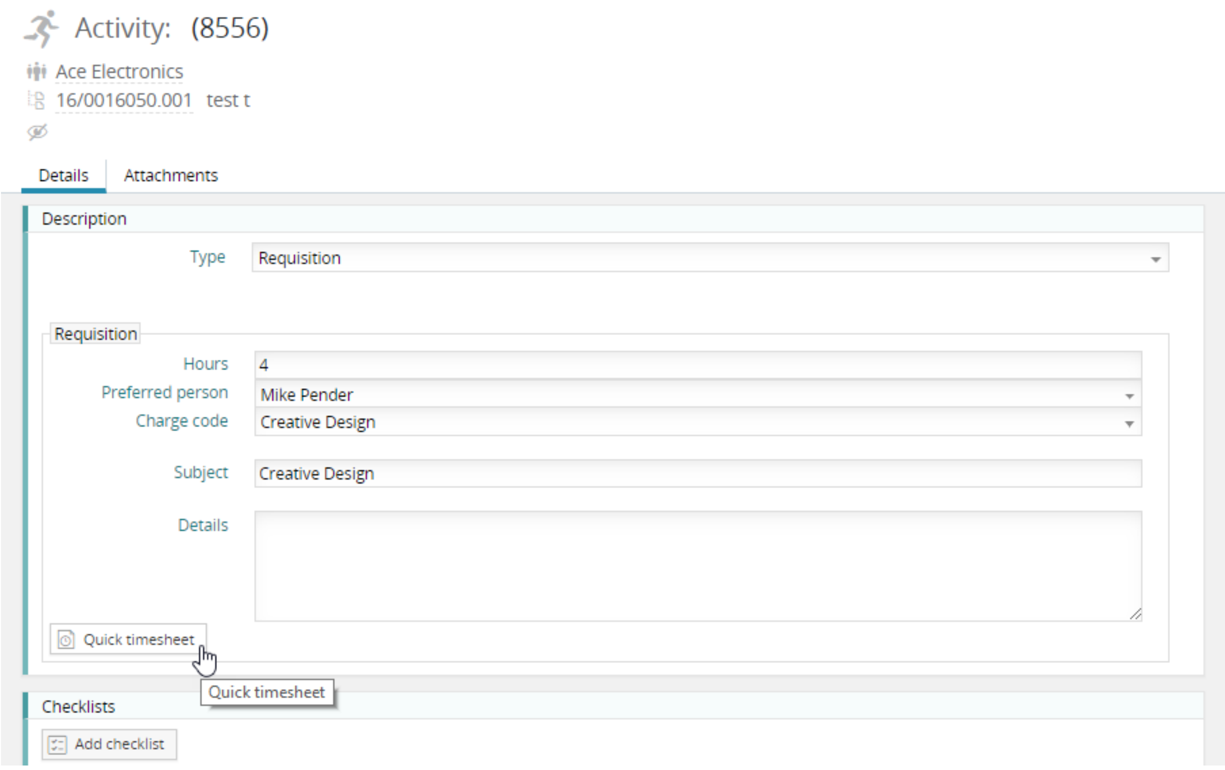
This feature is designed for companies who wish to assign work to staff without necessarily using estimates or creating calendar bookings. Requisitions can now be assigned to a user and viewed on the Kanban board. These same requisitions can also be pulled into the calendars based on the start and end dates of the requisitions.

If deciding to use this new method of assigning work, companies might wish to encourage users to post timesheets directly from requisitions. In this workflow model, requisitions would be raised by account handlers with realistic start and due dates. These requisitions would then either be assigned to staff (via the 'Owner' field on the requisition) or by users self-selecting the requisition from a list of unassigned requisitions.

To create a 'Quick timesheet' through an activity:

- Select 'Activities' in the main menu
- Open an activity from the Activity list or the Kanban view

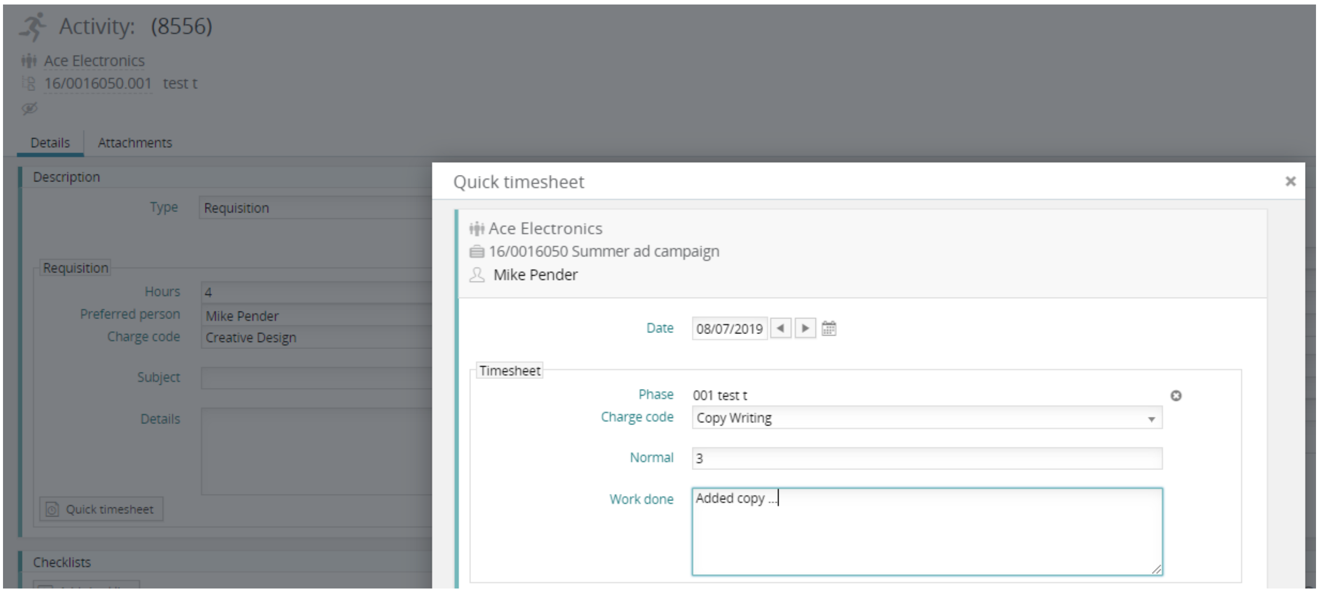
The 'Quick timesheet' button displays if the activity 'Type' is set to 'Requisition' and the activity is linked to a job or a job phase. Click the 'Quick timesheet' button to create a timesheet.



Creating a timesheet

If the user is the owner of an activity, they can create a timesheet by clicking the 'Quick timesheet' button.

Please note that the user does not have to select the same charge code as the requisition or the same number of hours. Neither does the 'preferred person' need to be the person creating the timesheet. In Synergist requisitions, the specified number of hours, charge code and preferred person are suggestions from the creator of the requisition. The actual work allocated or performed may end up being something different to the initial requisition's suggestion. It's designed this way to keep the requisition process as flexible as possible.



Timesheets tab on activity record

The 'Timesheet' tab displays in an 'Activity' when either pending or real timesheets have been booked against an activity. If there are no timesheets booked, then the 'Timesheets' tab won't display. The 'Timesheets' tab displays two separate read-only tables for pending and real timesheets.

Details | Attachments | Timesheets

Pending time

Staff	Charge code	Date
Phil Rawson	Artwork hours	18/07/2018
TOTAL		

Timesheets

Staff	Charge code	Date	Daytime
Alan Greenwood	test charge code	24/09/2018	1
TOTAL			1

Activity priority column - Colour coding

To enhance the 'Priority' column in the Activity list, the text has been colour coded:

- High Priority - Red
- Medium Priority - Amber
- Low Priority – Green

Priority
High
Med
Low

This colour coding feature is present in both 'List' and 'Kanban' modes.

Activity checklist enhancements

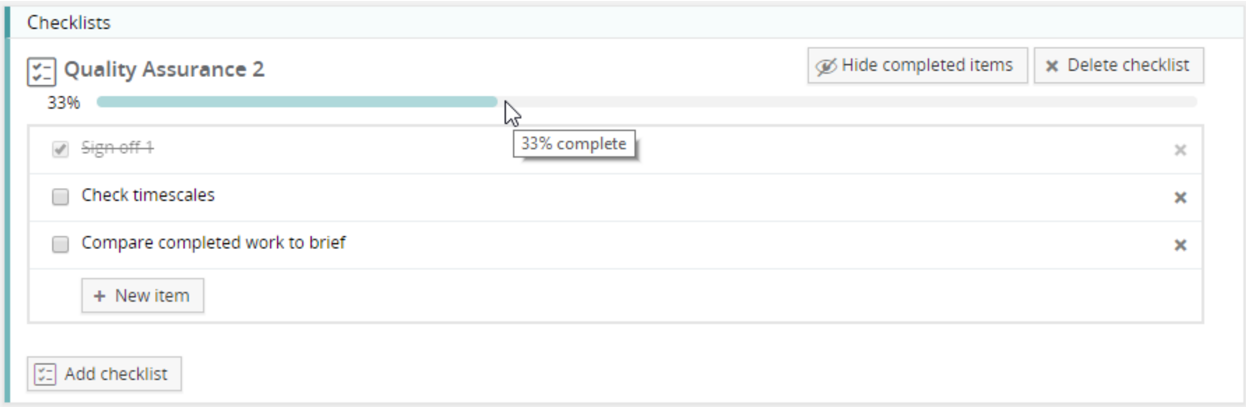
Progress bar on 'Activity' checklists

Progress bars have been introduced to help communicate progress and completion of Activity Checklists.

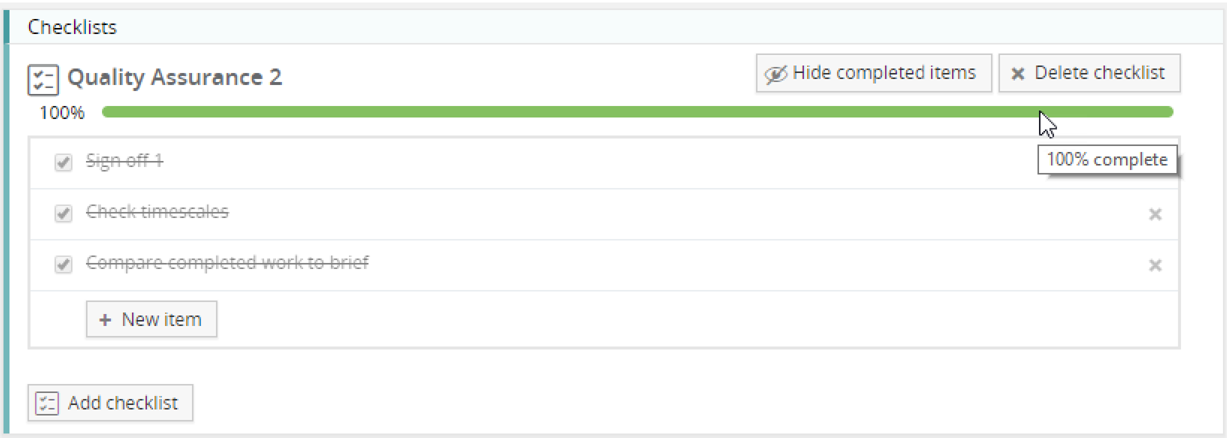
To access this feature:

- Select 'Activities' in the main menu
- Open an activity in the 'Activities list'
- Click the 'Details' tab
- Locate the 'Checklists' panel

When items in a checklist are ticked off, the progress bar displays the percentage of completed items.



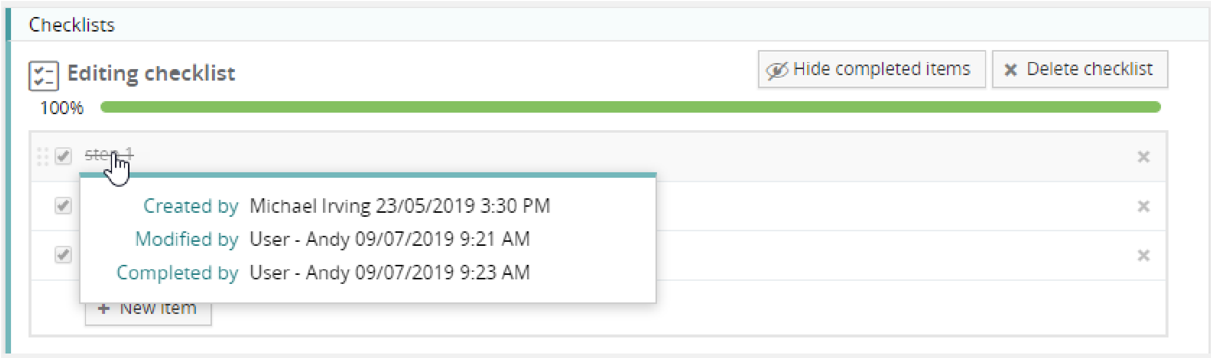
When the checklist is completed, the colour of the bar changes from cyan to green.



Activity checklist pop-up information

An enhancement to the 'Activities Checklist' includes pop-up text displaying the following information:

- Created by (Name, Date, Time)
- Modified by (Name, Date, Time)
- Completed by (Name, Date, Time)

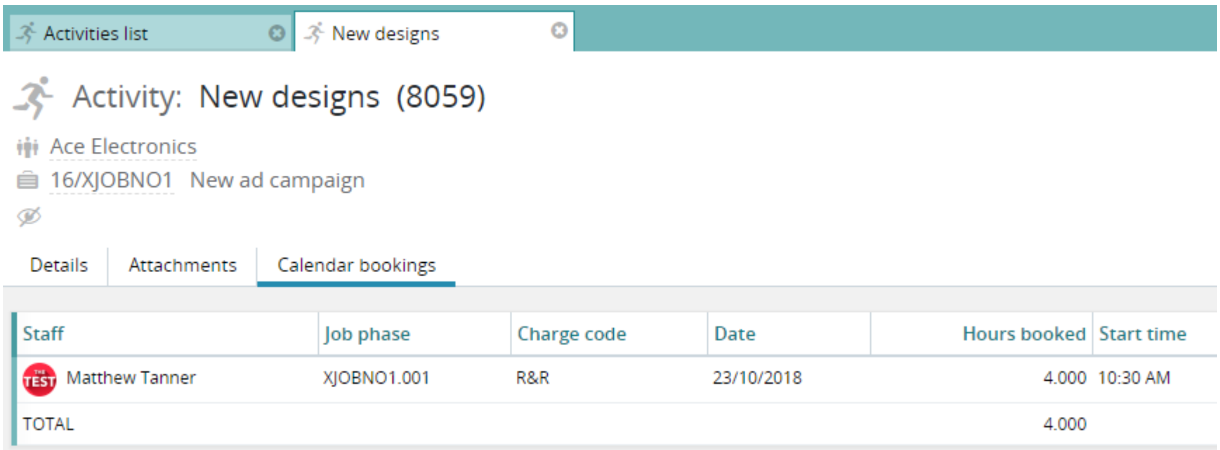


Calendar bookings tab added to an activity

If using requisitions, it is useful to be able to see all the bookings that have been generated from a requisition.

To access the 'Calendar bookings' tab:

- Select 'Activities' from the main menu
- Open an activity (typically a requisition) in the list
- Click the 'Calendar bookings' tab



Batch create activities

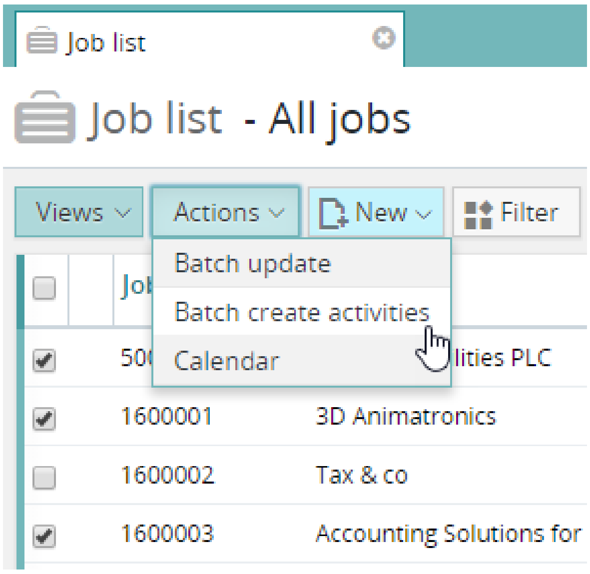
The 'Batch create activities' function creates multiple activities for:

- Clients
- Contacts
- Jobs
- Phases
- Opportunities

From any of the above sections:

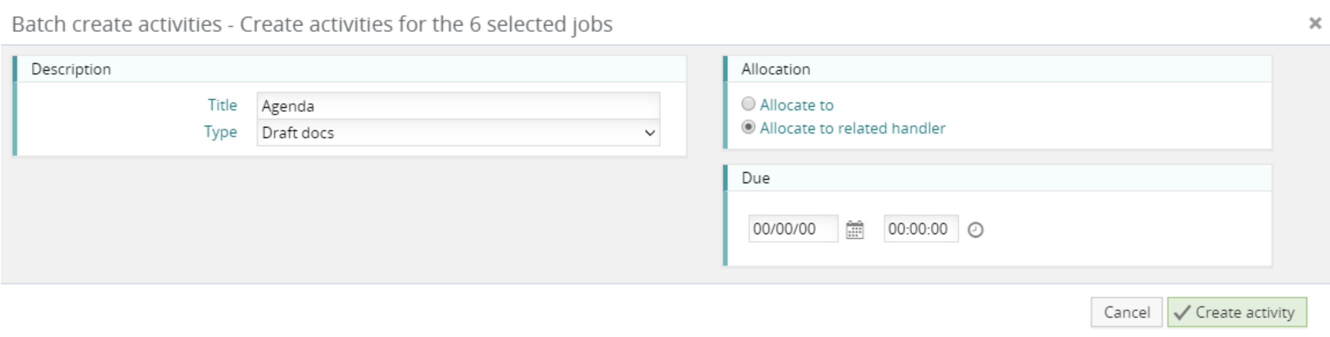
- Use the tick boxes to select one or more items in the list
- Click the 'Actions' button
- Choose the 'Batch create activities' option

In the following example, 'Batch create activities' has been accessed via the 'Job list'.



Batch create activities screen

The title of the window indicates how many items have been selected. Complete the fields in the pop-up window and then click 'Create activity' to finalise the action.



Description of fields:

- **Title**
  Common description for all the activities about to be created

- **Type**
  Select an activity type

- **Allocate to**
  Select the owner of the activities from the drop-down menu. If set to '-Blank-', the current user becomes the owner

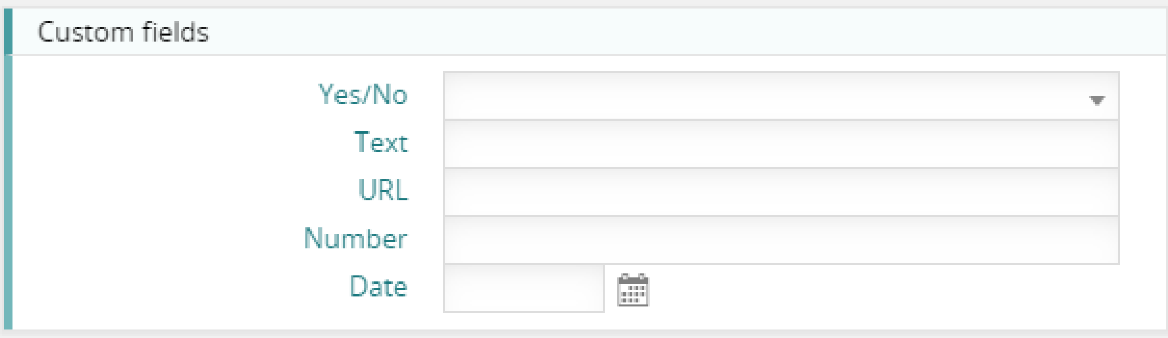
- **Allocate to related handler**
  Sets the related handler as the owner of the activities

- **Due date/time**
  If not set, they default to the current date and 8:00AM

Batch updates

URL custom field in activity 'Batch update'

The 'Custom fields' panel on the right-hand side of the 'Activities batch process' window now supports URL field types.



Boolean (Yes/No) fields supported in Batch updates

The 'Client list' and 'Client contact list' support Boolean (Yes/No) fields for Batch updates.

Batch updates in these areas now support the following custom field types:

- Boolean (Yes/No)
- Text
- URL
- Number
- Date

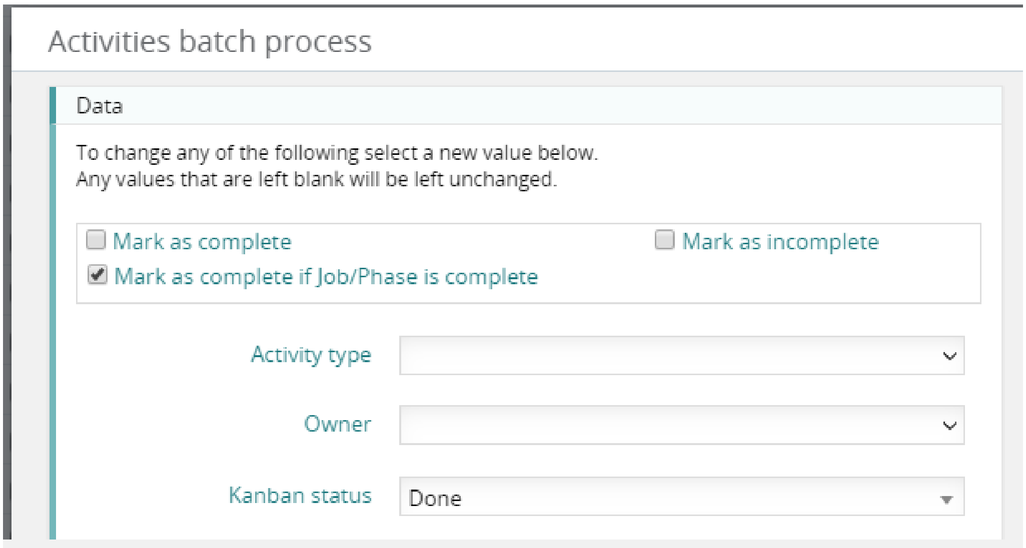
Mark as complete - Activity batch update

Previously, there were only two tick boxes in the 'Activities batch process' pop-up window:

- Mark as complete
- Mark as incomplete

A third tick box, **'Mark as complete if Job/Phase is complete',** has been added for batch processing. Clicking this box also sets the Kanban status to 'Done'.

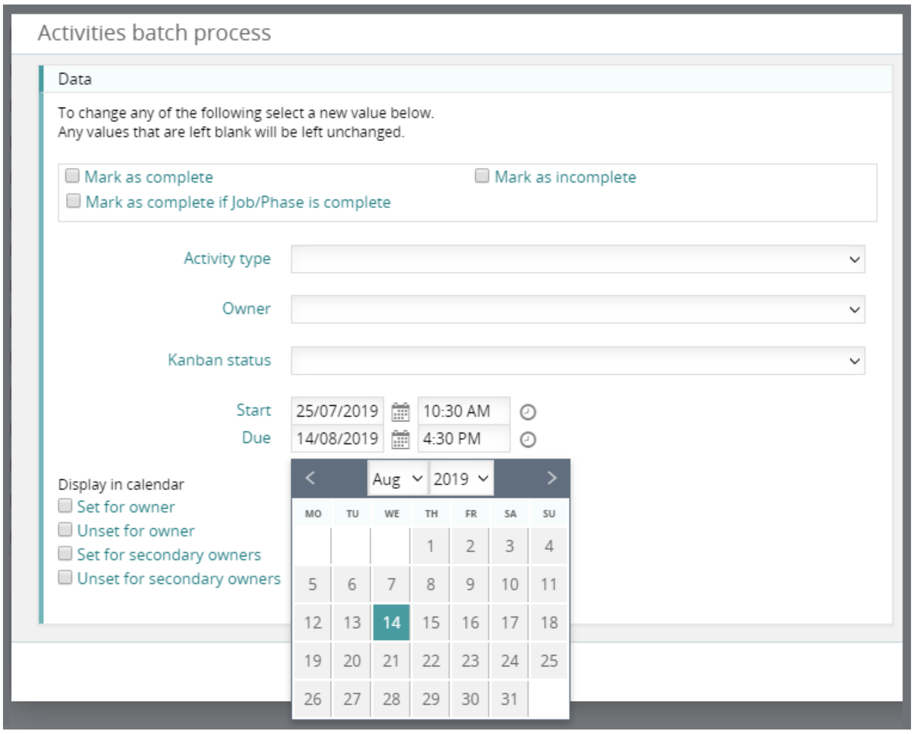
This is as useful feature for completing any activities left open after their related jobs have been completed.



Start date and time - Activity batch update

To change the date, click the calendar icon. 

To change the time, click the clock icon. 

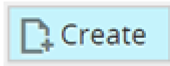


Options for attaching documents

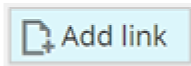
Synergist provides several ways to attach documents, with each method having its own button.

Uploaded attachment
Users can browse their local machine and shared drives, attaching documents and files. The attachments cannot be opened directly in Synergist. The files need to be downloaded and then opened or viewed externally to Synergist.

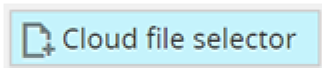
Synergist document
These documents are special HTML files that may be created by the user or generated from templates. The documents can be opened or viewed in Synergist but cannot be downloaded in their raw format. To send a Synergist document to a colleague or client, download a PDF version of the document and then send the PDF.



Link
A new feature enabling a user to create a special type of attachment that is essentially a hyperlink to any resource on the web.



Cloud
A new feature enabling users to attach and open files stored on cloud servers similar to Google Drive and Microsoft OneDrive. See below for more information on this type of attachment.



Note: The cloud icon will reflect the cloud system where the document resides. In this example it is OneDrive.

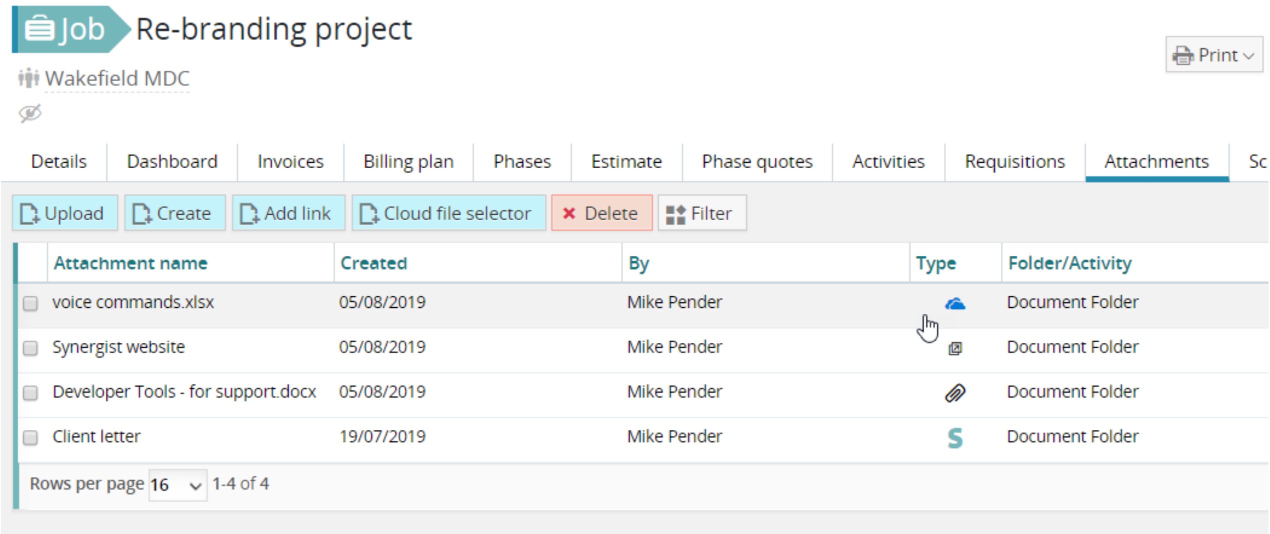
Attachment tabs

Attachments are listed under the 'Attachment' tab in the following areas of the program:

- Client
- Client contact
- Job
- Phase
- Opportunity
- Activity
- Supplier

Example of the 'Attachment' tab on a job

In this example, there is one attachment of each type as described above.



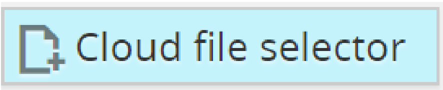
Cloud attachments

In order to attach a document stored in the cloud, the user must first have one or more cloud provider accounts. There is no restriction to a single cloud solution – cloud accounts can be mixed and matched. For example, a user may have accounts for Google Drive / G-suit and Microsoft OneDrive / Office 365. Documents can be attached from both sources in the same list of attachments. When clicked on, these attachments are opened by the cloud provider using the appropriate application (e.g. Word / Google Docs / Excel / Google Sheets).

Note: Only files in shared areas of the cloud should be attached to Synergist because if a user attaches a file that only they have access to, other users will not be able to open the document.

Attaching a cloud document

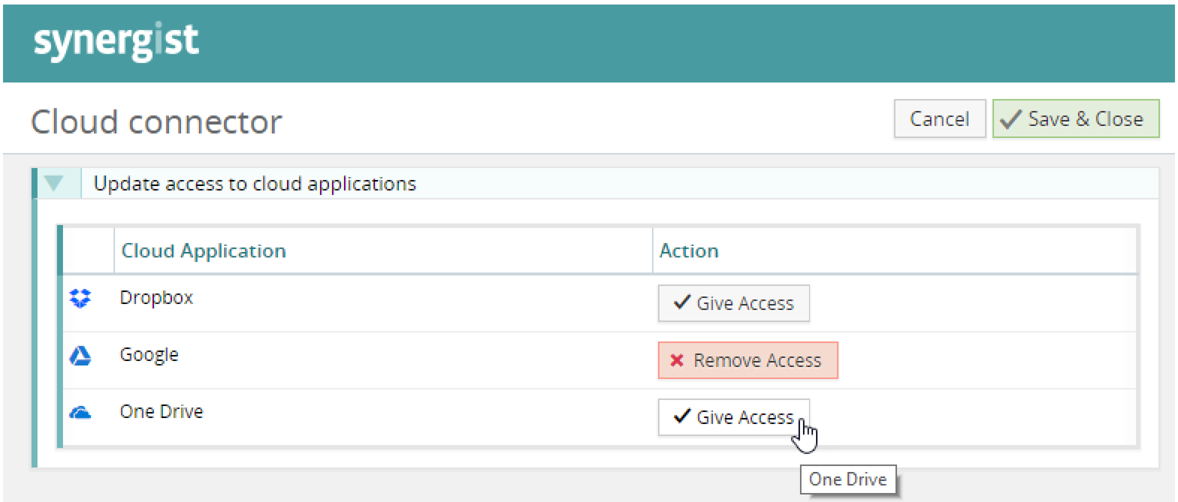
To attach a cloud file document, first click the 'Cloud file selector' button.



This opens a new browser window over the Synergist application. From here, the user has access to the cloud apps created by Synergist to enable connectivity between Synergist and cloud platforms.

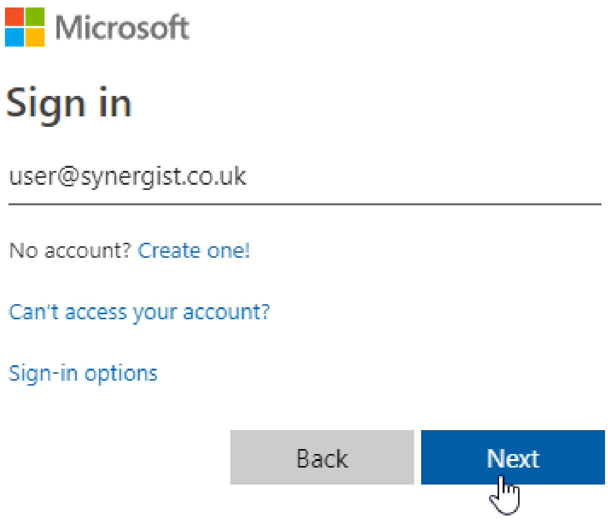
Initial use

Users who have never granted cloud access to Synergist will need to provide authorisation. In the following example, the user is granting access for OneDrive.



Cloud provider

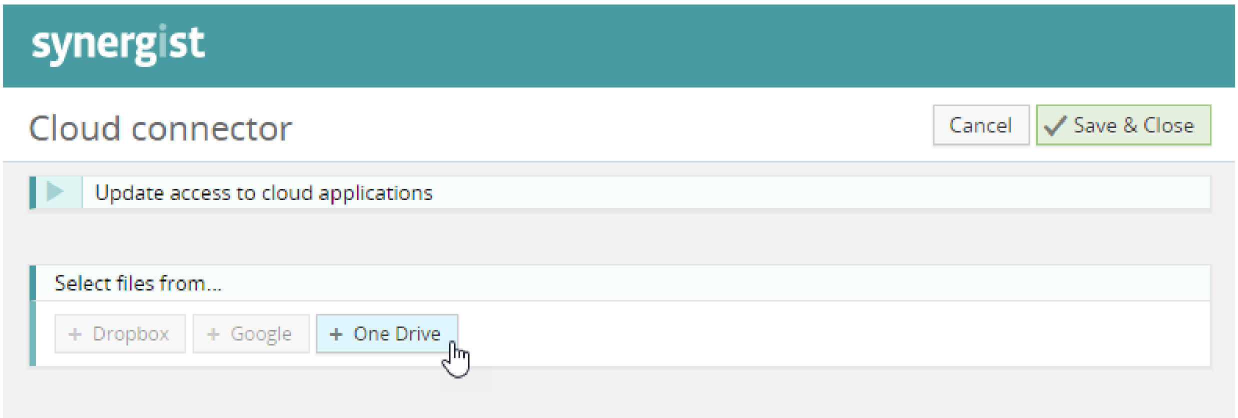
On clicking the 'Give Access' button, the user is re-directed to the cloud provider to log in and asked to grant access to the Synergist cloud app. Granting access rights to Synergist only needs to be done once.



Selecting files to attach

Once a user has given access rights to Synergist, they can select files from the cloud provider and attach documents to Synergist.

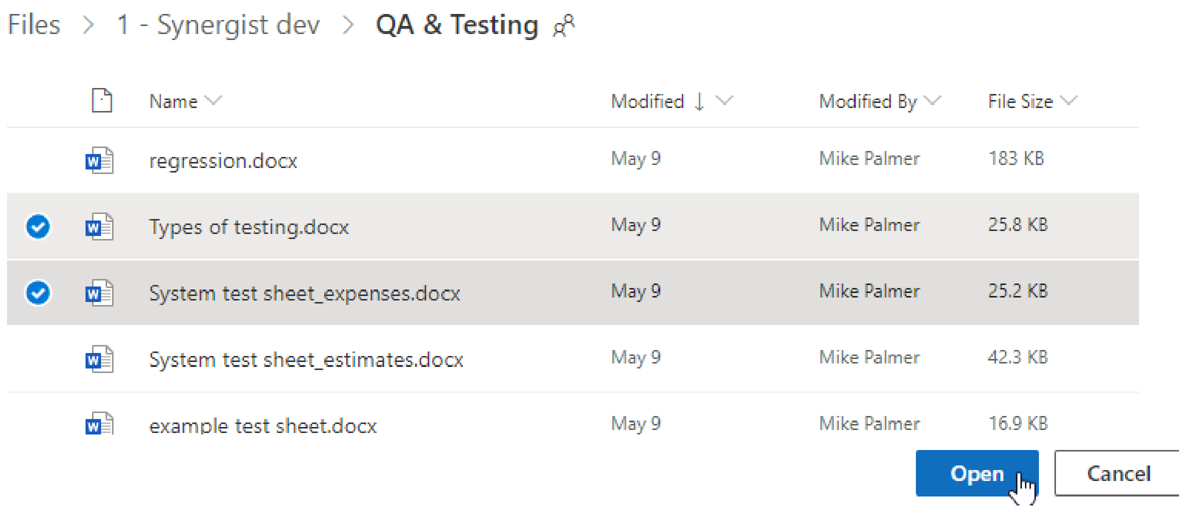
To start this process, click the button...



Example – Microsoft OneDrive file picker

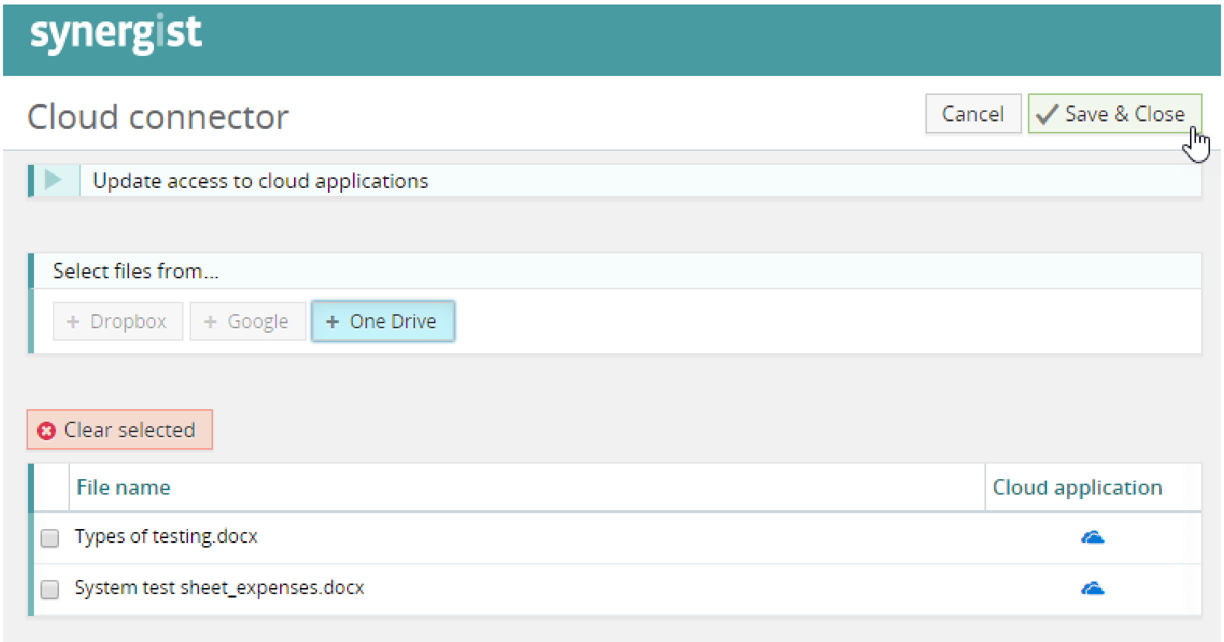
When the cloud provider's file picker opens, users typically navigate to a shared area in their cloud storage. Please remember that if an attached file is personal and can only be viewed by the user, other users won't be able to open it within Synergist.

Multiple files can be selected if the provider's file picker allows this feature.



Checking the files before uploading

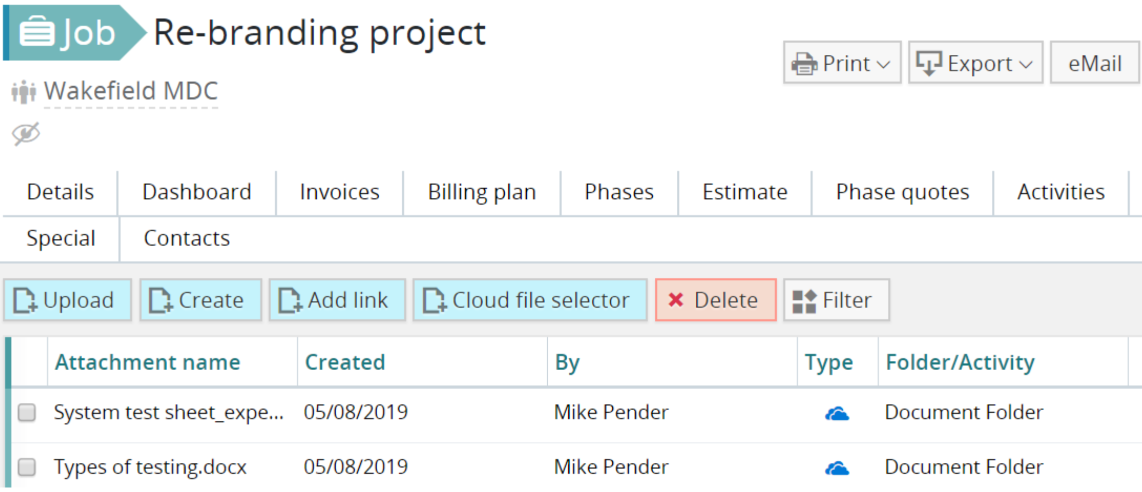
On selecting 'Open', the file picker disappears and a list of files is displayed. Confirmation is necessary to upload the files as attachments to Synergist.



(ATTACHMENTS CONTINUED ...)

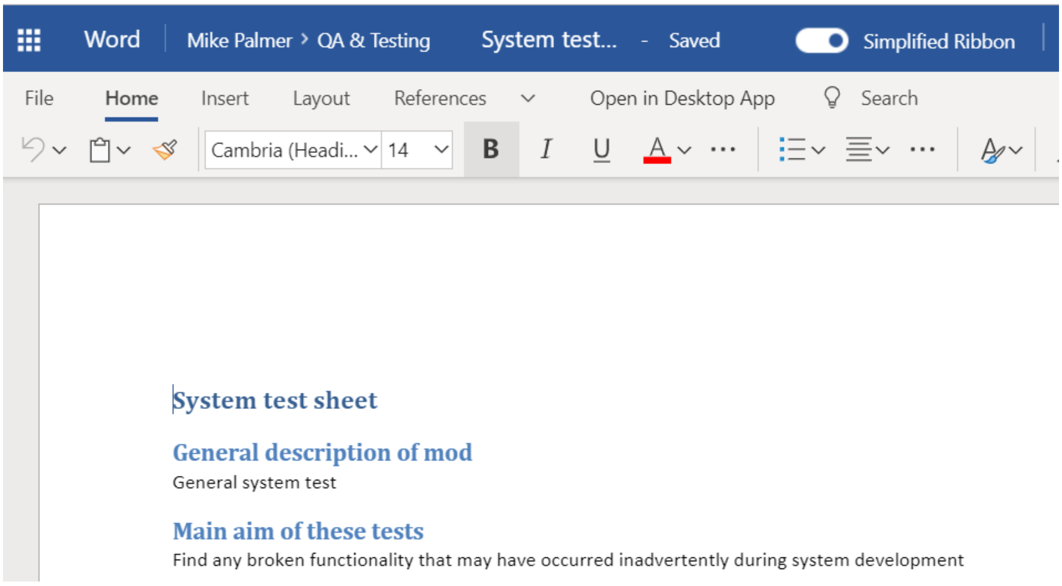
Uploading the attachments

On clicking 'Save & Close', the browser window closes and the list of attachments is viewable. The spinning 'S' icon displays for a few seconds while the documents are added to the attachments list in Synergist.



Opening a cloud document

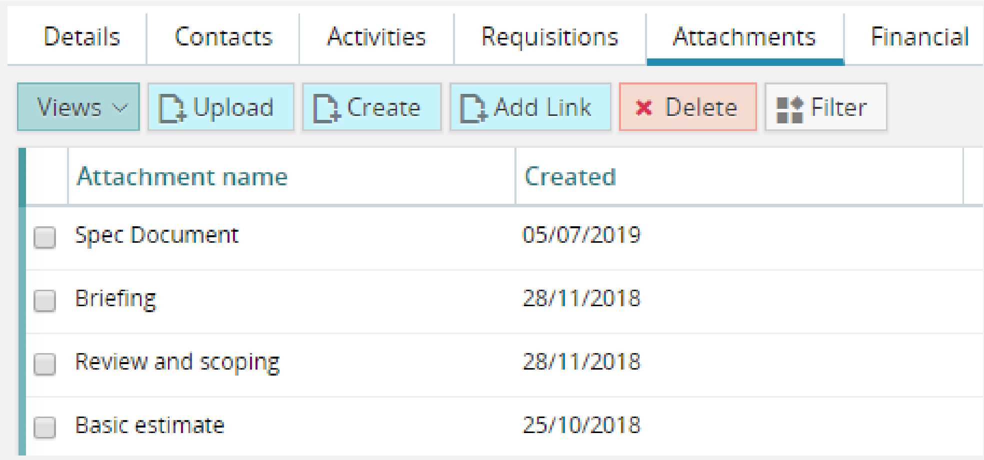
To open a cloud document, click on the attachment and the document opens in its web application. In most cloud applications, multiple users can simultaneously edit the same document.



Note: Cloud attachments are not stored in Synergist. Synergist simply has a link to the original document. If an attachment is deleted in Synergist, the document still exists in the cloud. However, if an attachment is deleted in the cloud, the link will be broken and it will not be possible to open the document from within Synergist.

Synergist documents

Synergist documents can be accessed via the 'Attachments' tab within Clients/Jobs/Phases/Activities etc. Various enhancements have been added to Synergist documents in this release.

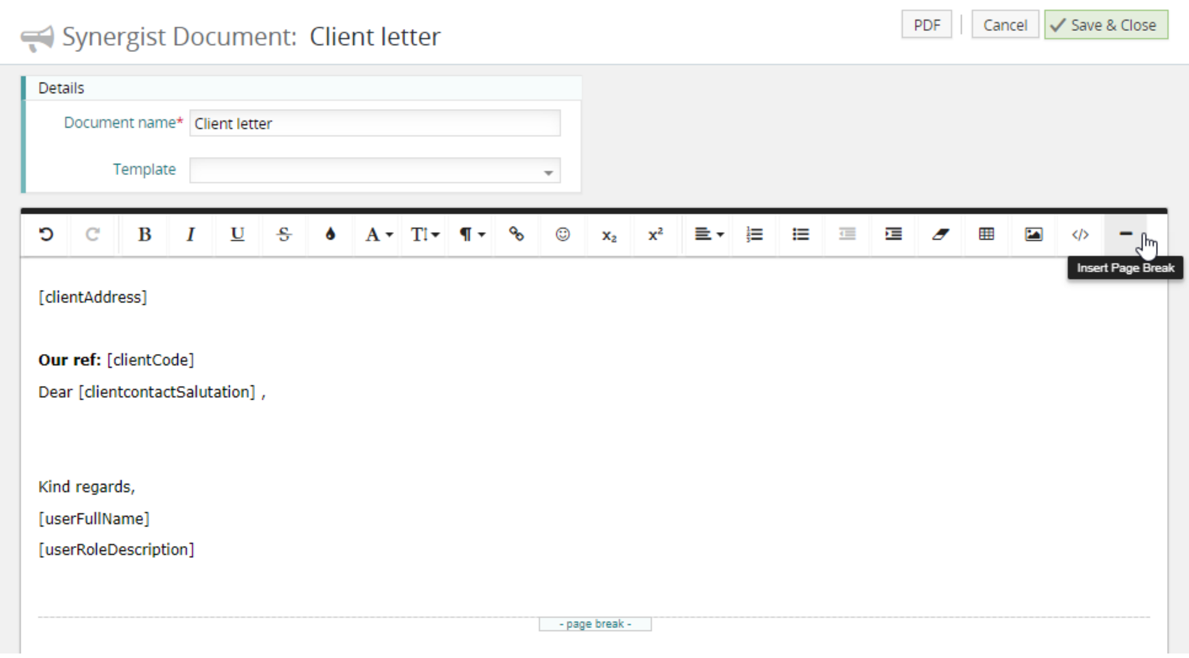


Emoji's

Greater support provided for the use of emoji icons and tables.

Page breaks

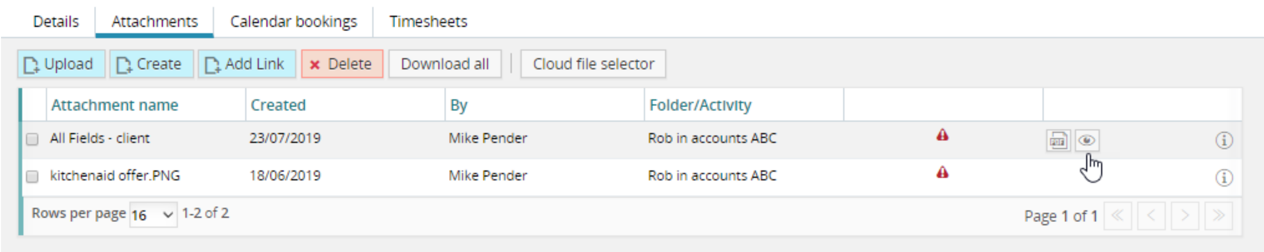
Page breaks can now be embedded in Synergist documents.



View only option

Documents opened in view only mode:

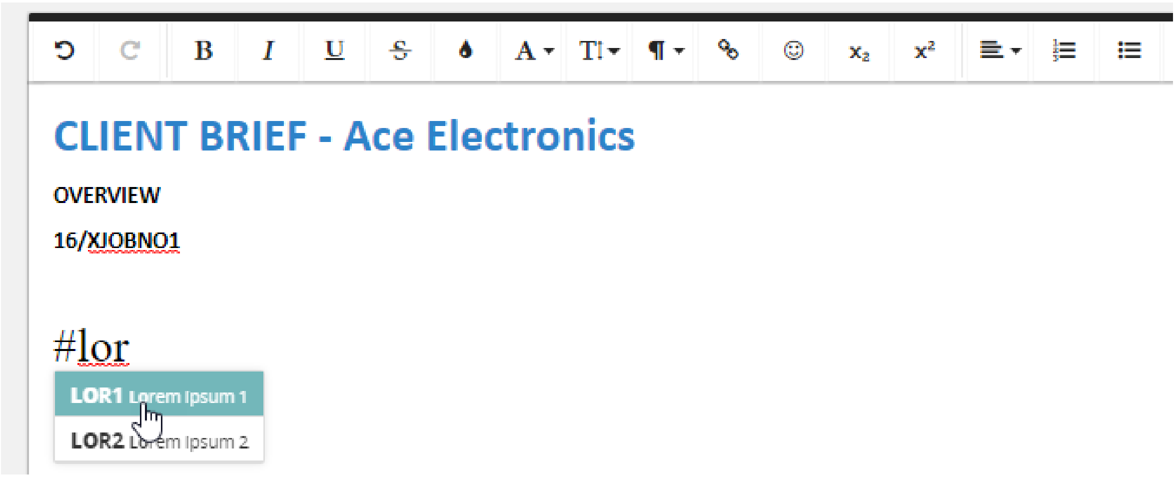
- allow users to read but not make edits
- have embedded links which are active. In edit mode, embedded links are not active.



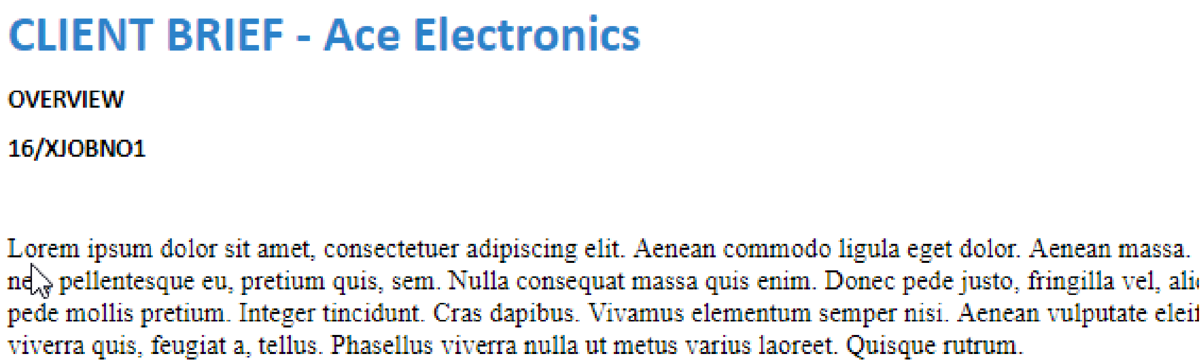
Standard paragraphs

If a set of standard paragraphs have been set up on the system, they can be accessed from within a Synergist document by pressing the hash key (#) and selecting from the drop-down list.

Press the hash key (#) and select from the list.



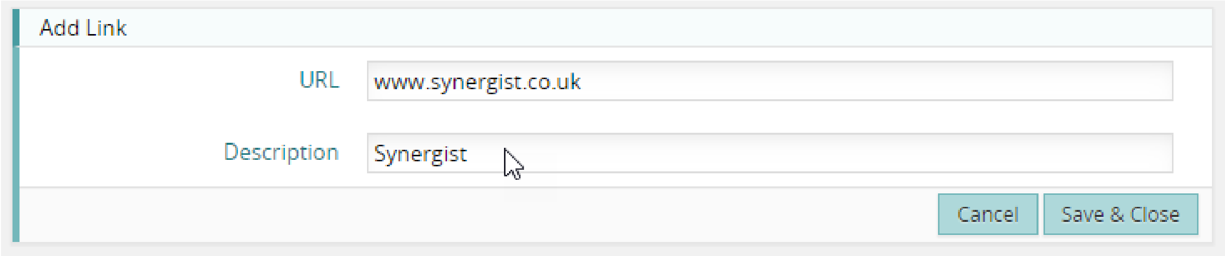
Text from the standard paragraph is pasted into the document.



New type of attachment – URL hyperlink

Adding URL hyperlinks via custom fields to a Client/Job/Phase provides easy access to useful websites and other online resources. However, a more ad-hoc and simpler solution is to create an attachment that works like a link.

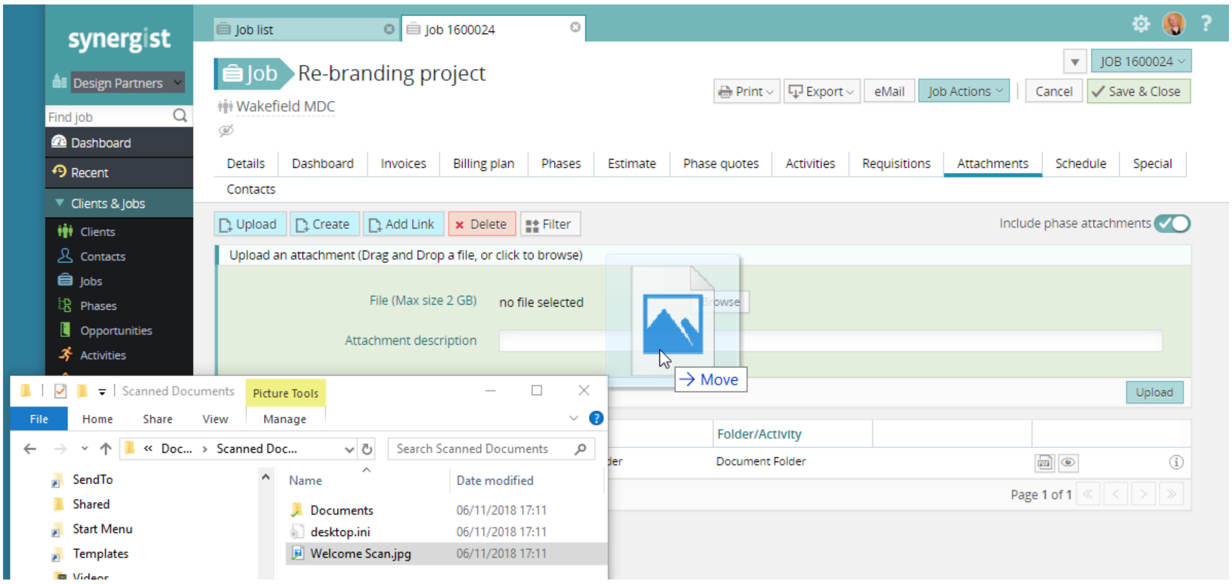
Select 'Add link' when creating an attachment and complete the 'URL' and 'Description' fields.



The newly created attachment appears in the attachments list and its attachment type is a link. Simply click on the item to open the URL.

Drag and drop when uploading a file

When uploading a file to create an attachment, users have the option to drag and drop the files on to the screen. On the 'Attachments' tab, click the 'Upload' button and then drag and drop the required file from the PC/Mac file explorer.



BILLING PLANS

Multi-job billing plan view

Previously, to work with billing plans it was necessary to navigate to a job or phase and view/edit the billing plan there. The new Multi-job billing plan view provides the user with an overview of the entire billing plan. This feature can be accessed from the following areas:

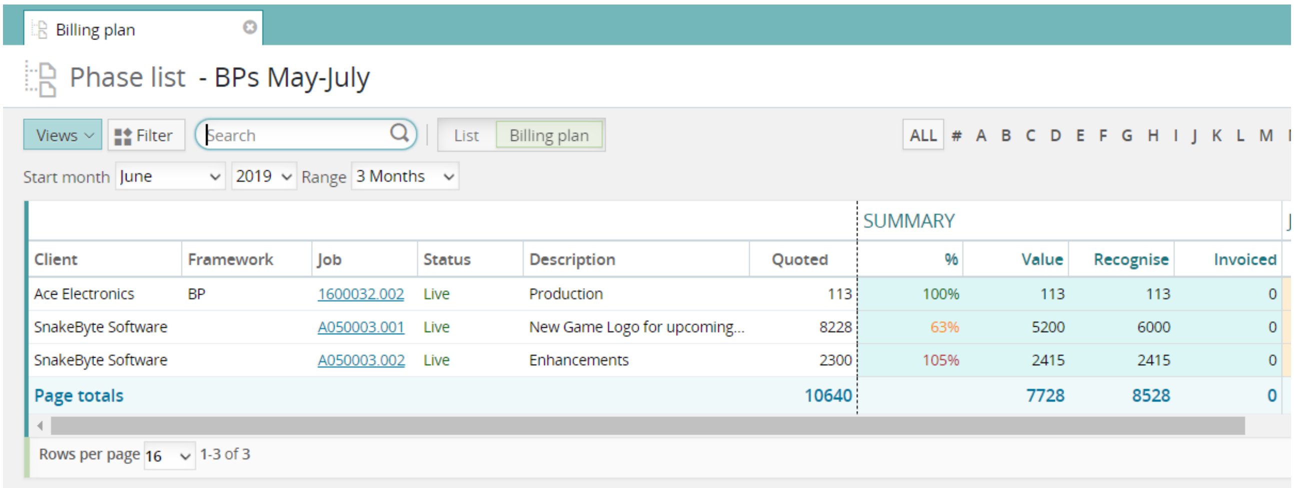
- Client card
- Job list
- Opportunities list
- Phase list

When navigating to a Job list or Phase list, the default view is the 'List' view. Click on the 'Billing plan' button to see the billing plan view.

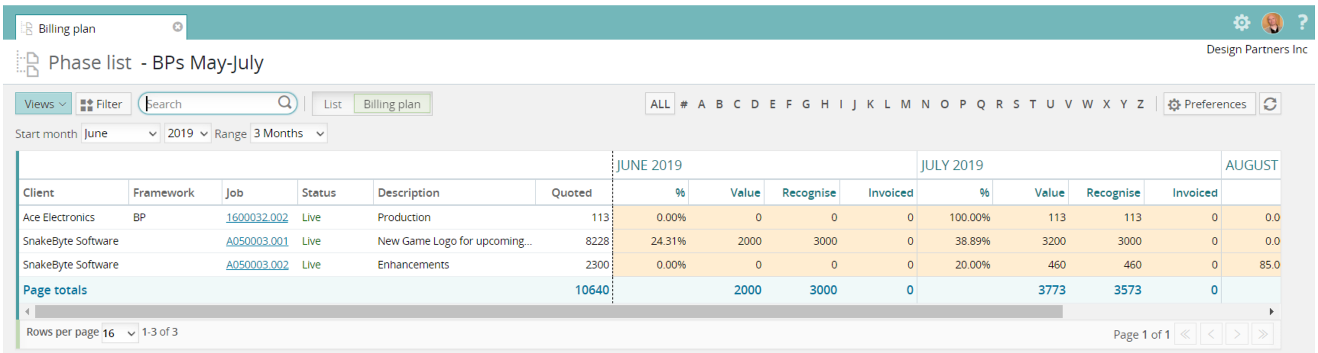
The billing plan view displays all the billing plans for the jobs/phases in the current view. The jobs/phases can be filtered in the normal way or by means of the 'Views' button may be selected.

The columns on the left-hand side of the table display the job/phase details and their data can be sorted by clicking on the column headings.

Selecting a job/phase number opens the billing plan tab for in-line editing (see below).

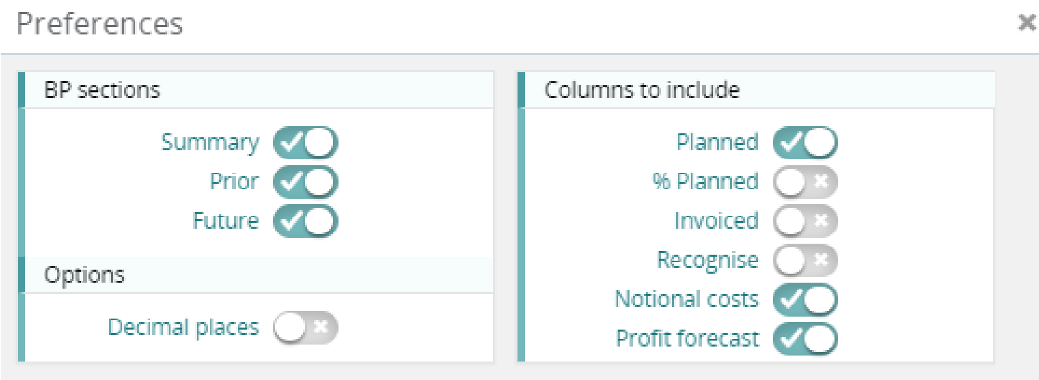


To the right of the job/phase details are the 'Summary' and 'Prior' columns along with billing plans for the selected months.



Preferences button

Options are available to control the data shown in the multi-job billing plan.



Available choices:

- **Summary**
  The summary is the total of all the billing plans for the job/phase. This value includes the billing plans that fall outside the range being displayed

- **Prior**
  This option totals all the billing plan values prior to the start of the monthly range

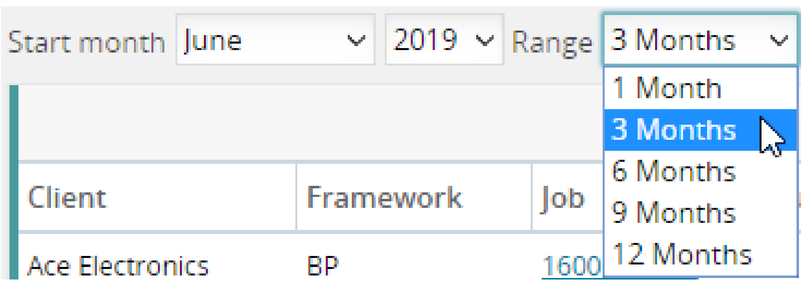
- **Future**
  This options totals all the billing plan values after the end of the monthly range

- **Decimal places**
  An option to show/hide decimal places

- **Columns to include**
  An option to choose which columns are to be seen

Date range

The 'Start month' and the number of months can be specified.



Weighting of Billing plans

Synergist provides comprehensive weighting features which are supported in the multi-job billing plan. There are two ways of weighting billing plans and these techniques are not mutually exclusive:

Job level weighting of opportunities

An opportunity can be weighted by estimating the percentage chance of the opportunity being won.

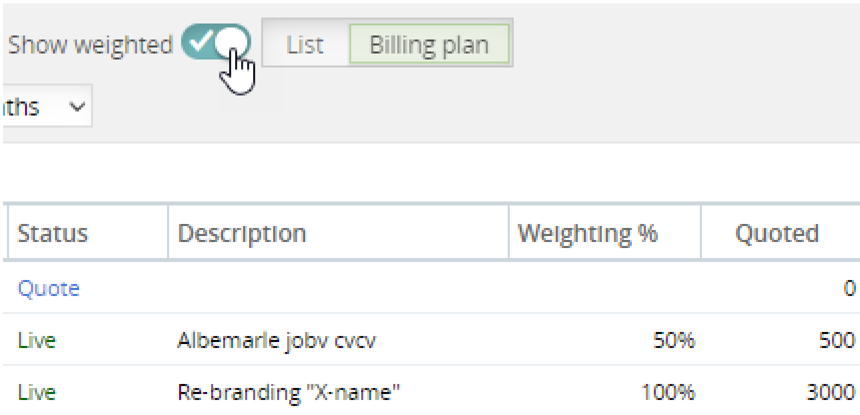
Billing plan level weighting

This is a more specialised type of weighting and is set on individual billing plans. With this method, the user weights a billing plan according to the estimated percentage chance of the required work being completed to justify the invoicing of the planned amount.

Set-up

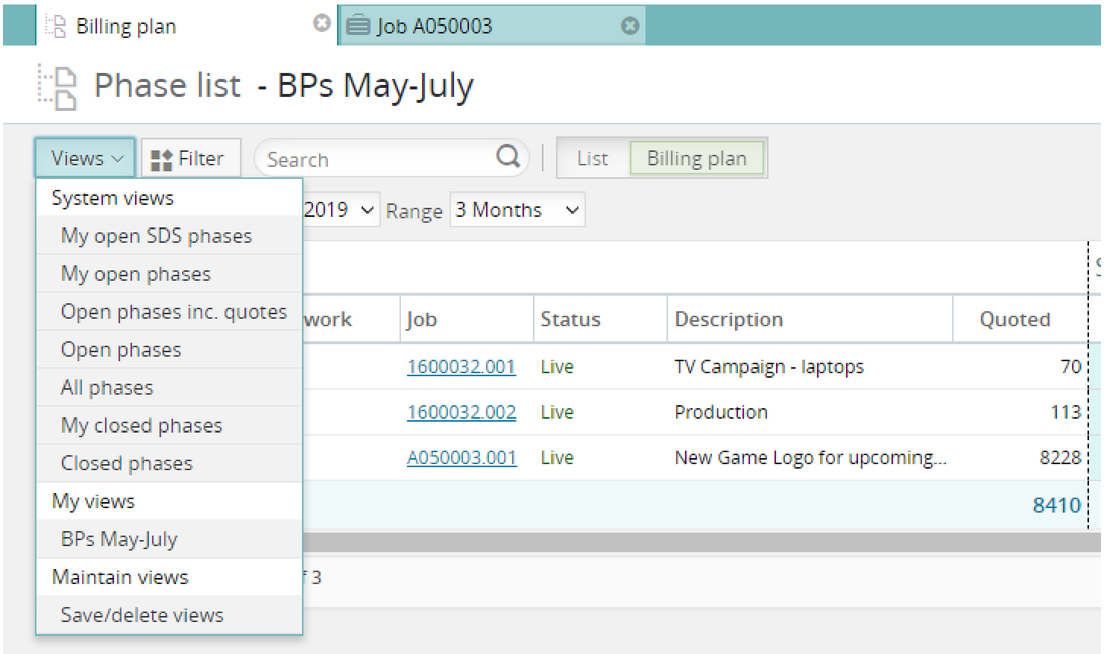
Job level weighting is switched on be default. Billing plan level weighting is an option set in the company settings. Any billing plan with its own specified weighting overrides the job level weighting.

Viewing weighted values in the multi-job billing plan



Views and filters

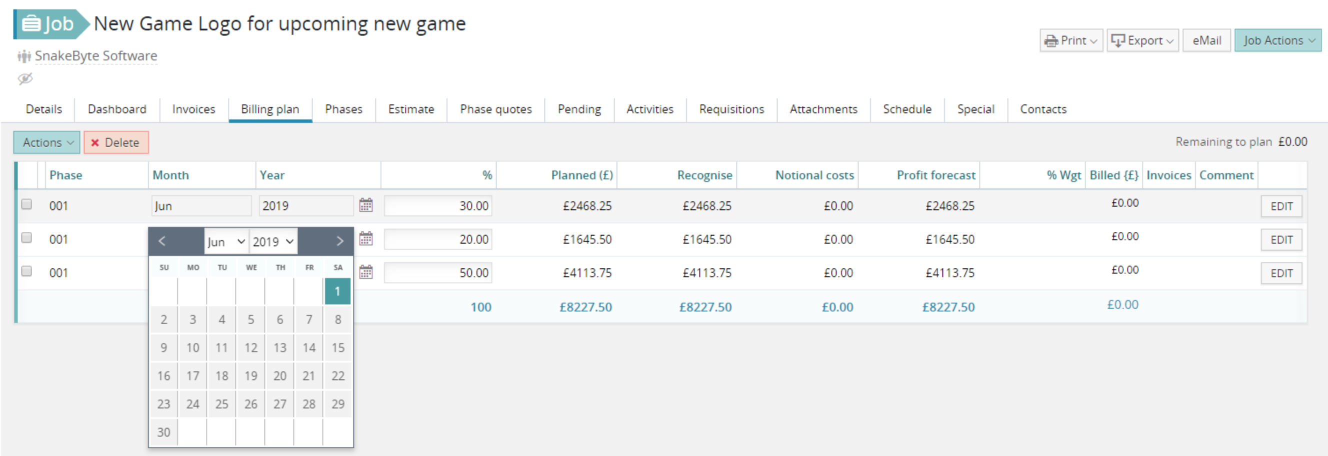
The multi-job billing plan shares the same 'Views' and 'Filters' as the Job/Phase lists.



In-line billing plan edit feature

The values in the Month, Year, % and Planned columns, as well as the Recognise column, can be edited inline. This saves the user entering each billing plan item in order to alter a plan.

To access this view, select the 'Billing plan' button and click the job/phase number.

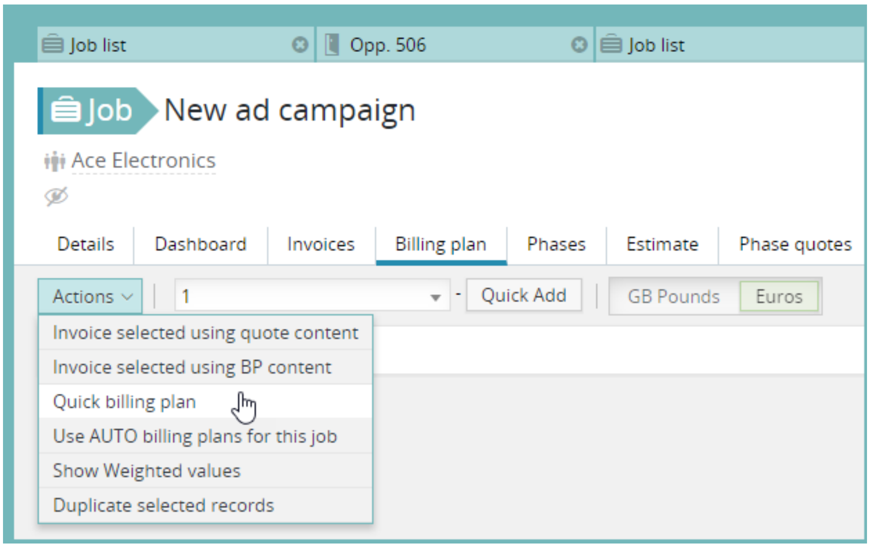


Quick billing plan

In addition to the simple 'Quick add' feature, there is now a more comprehensive feature for creating a set of billing plan items for a job or phase.

To access the 'Quick billing plan' feature from a job or a phase record:

- Select the 'Billing plan' tab
- Choose 'Quick billing plan' from the 'Actions' button drop-down list

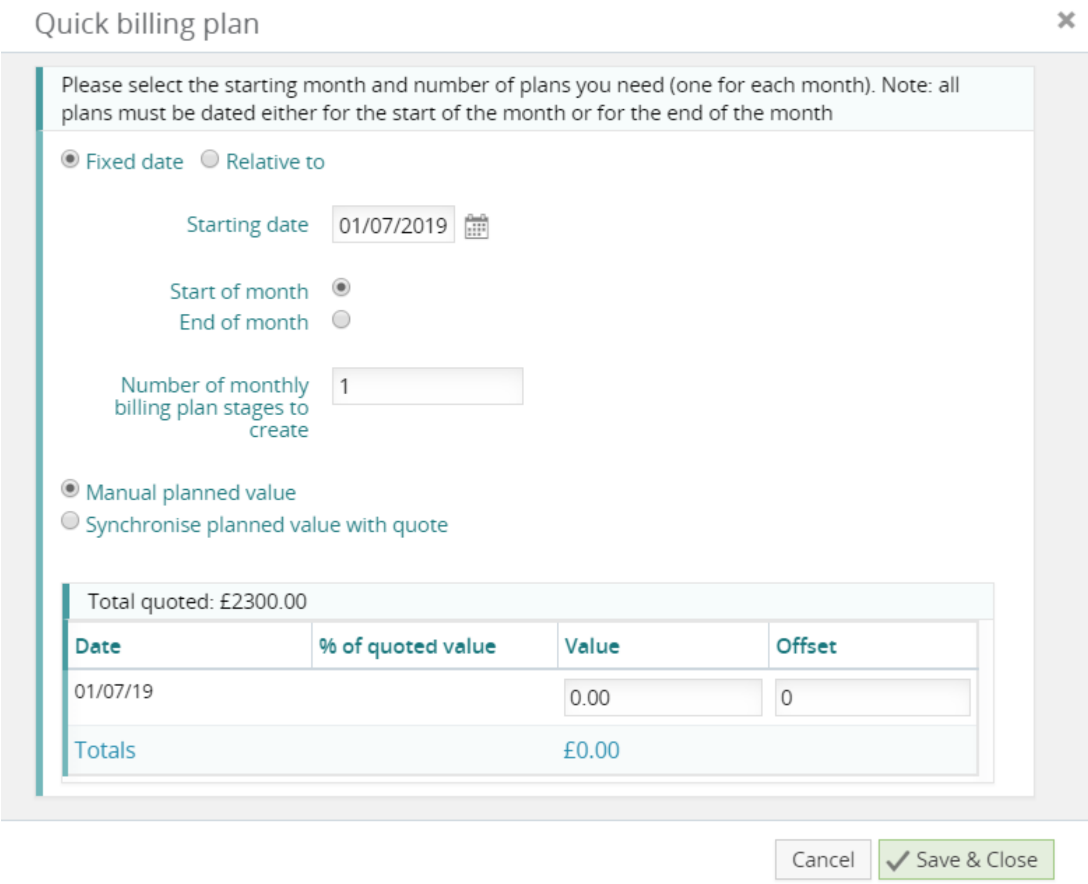


If there are no existing billing plans for a job, the pop-up window displays a choice to:

- **Create a job billing plan**
  - Only available if user settings allow job level plans

- **Create a multi-phase billing plan**
  - If a multi-phase billing plan is selected, the user is offered a list of phases to choose from.

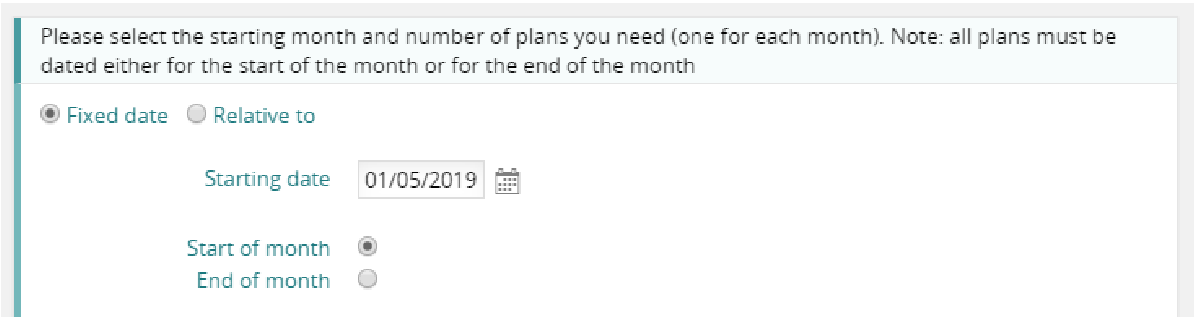
Quick billing plan input form



Billing plans can be created based on fixed dates or relative dates. With fixed dates, the user selects a date. With relative dates, the plan's dates are relative to the job/phase dates.

Setting dates

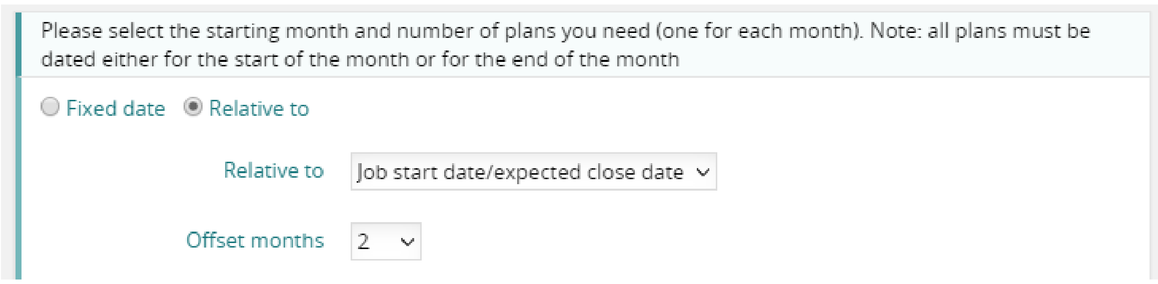
If 'Fixed date' is selected, the user selects a starting date.



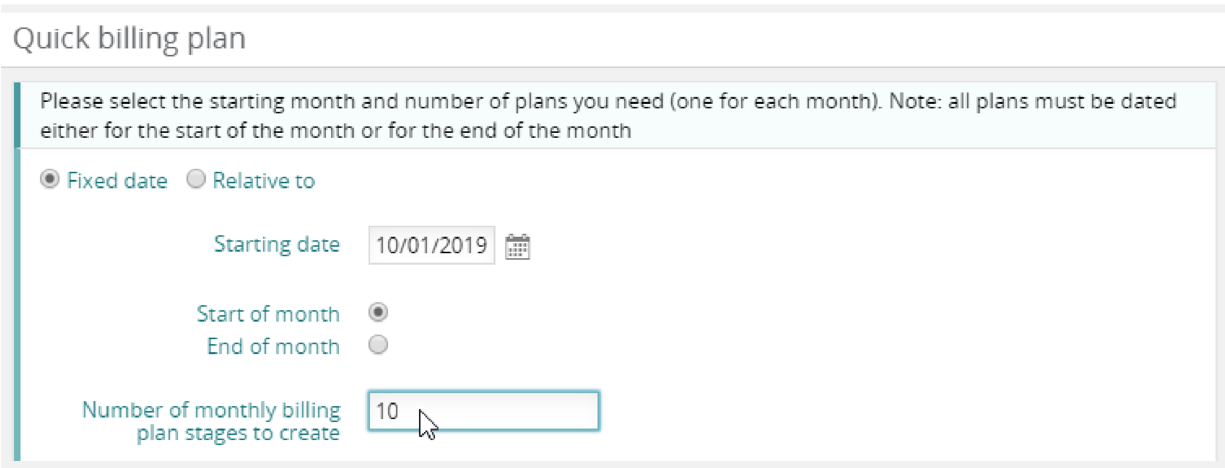
If 'Relative to' is selected, the date can be set relative to:

- Job start date / expected close date
- Job start date
- Job due date

The billing plan dates can be offset in months by plus or minus 12 months.

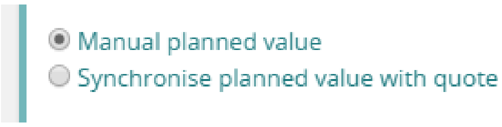


The number of billing plan items to create, can also be set:

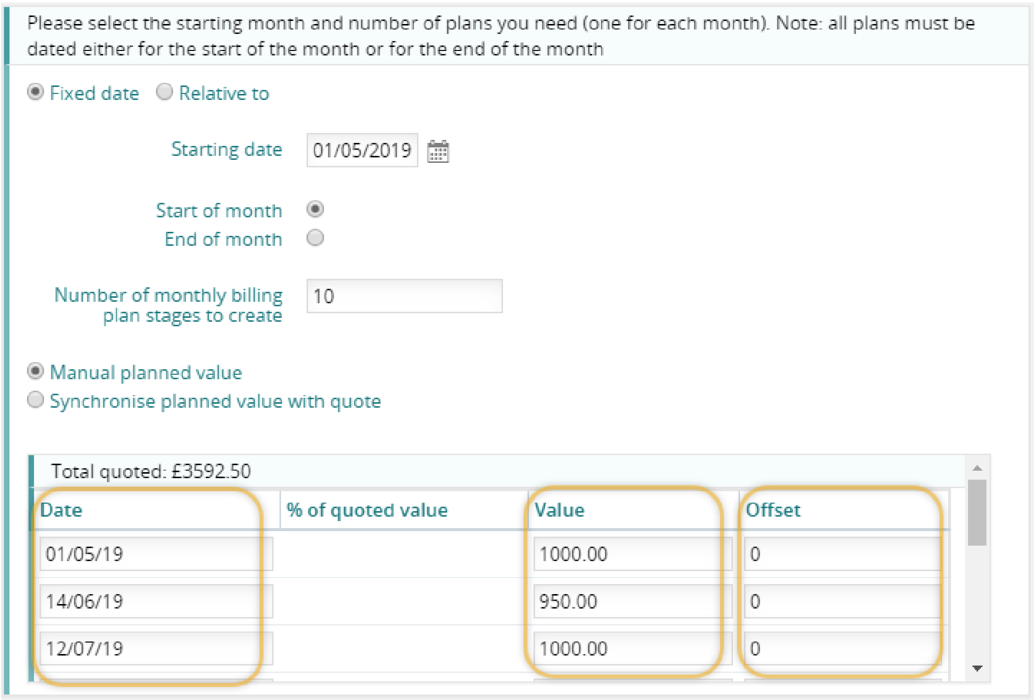


Synchronisation

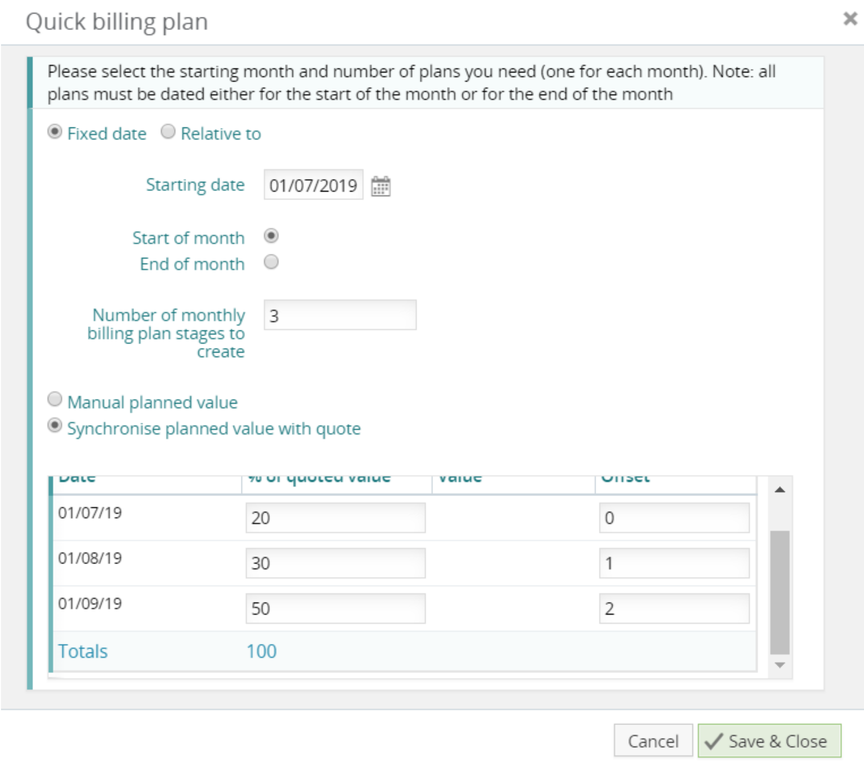
Users can now choose whether to enter 'Manual planed values' or 'Synchronise planned value with quote' using percentages. If 'Synchronise planned value with quote' is selected, the billing plan's values automatically adjust if the quoted value changes.



Manual planned values



Synchronised planed values



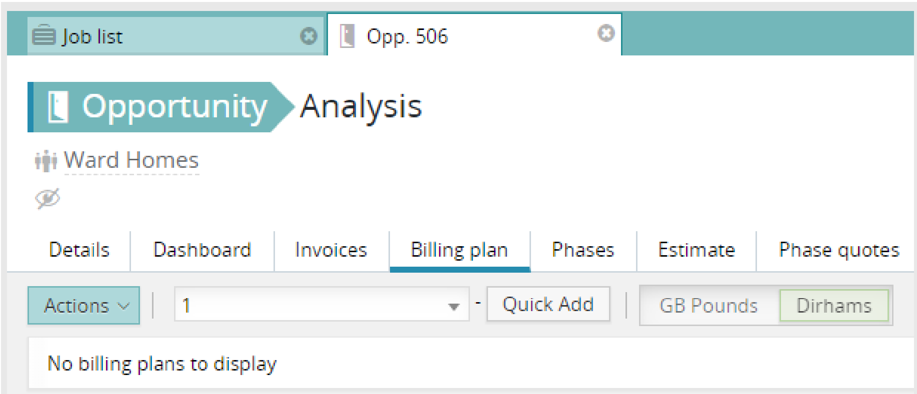
Quick Add – Now available from the job card

Note: Previously, phase level billing plans only had this feature available from the phase card.

If there are no billing plans for a job or a phase, a new 'Quick Add' feature assists in quickly generating and assigning new billing plans.

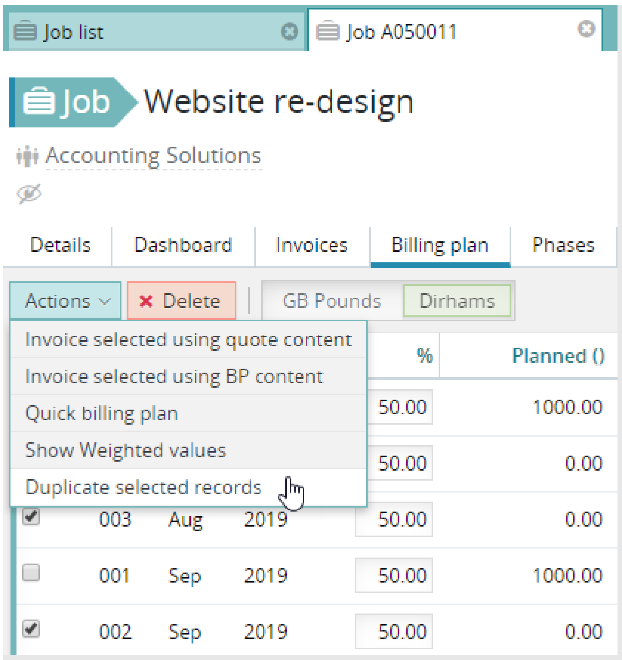
To access the 'Quick Add' feature:

- Select the 'Billing plan' tab
- Type in the number of billing plan months required
- Click the 'Quick Add' button
- The system creates monthly billing plans for all phases



Billing plan - Duplicate selected records

Billing plans are available at job and phase levels. The 'Duplicate selected records' feature copies selected billing plans to the same job or phase.

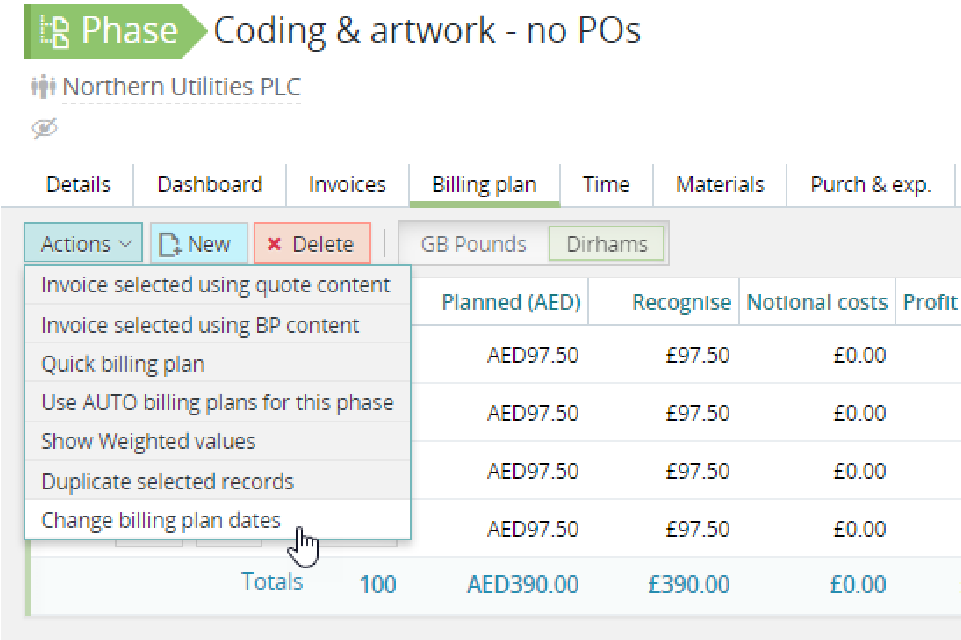


Details within the duplicated billing plan(s) can be amended by clicking the 'Edit' button on the right-hand side of the screen.

Billing plan - Change billing plan dates

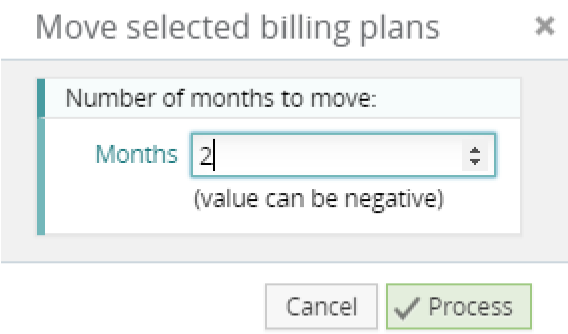
This feature enables a selection of billing plan items to move backwards and forwards in time.

Select 'Change billing plan dates' from the 'Actions' button drop-down list



Move the plans

The billing plan dates can be moved forwards or backward by intervals of a month.

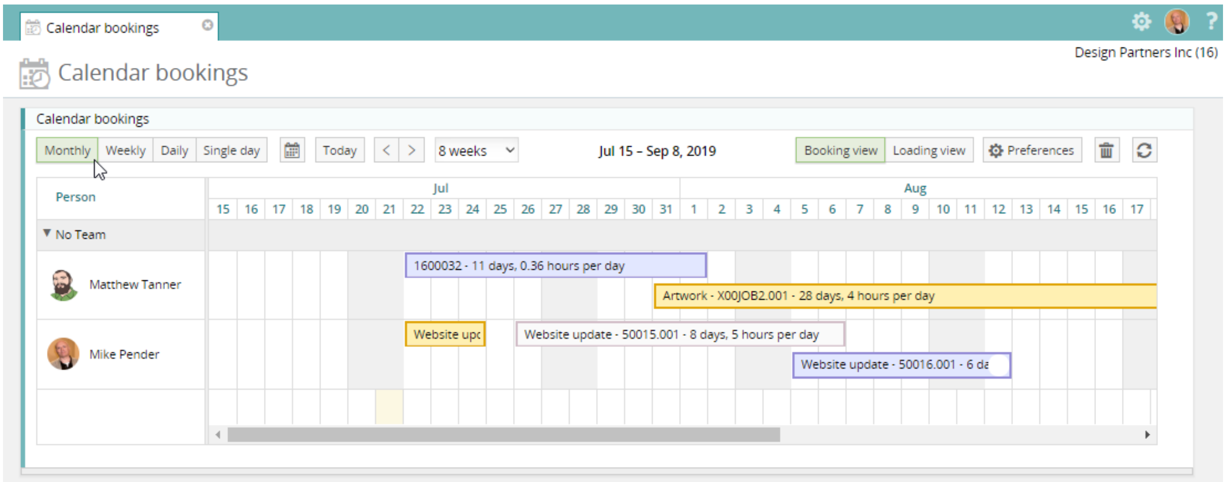


CALENDAR BOOKINGS

Monthly view

To facilitate creating long bookings spanning several months, as required by companies using a consultancy model, the 'Calendar bookings' module now has the following 4 views:

- Monthly
- Weekly
- Daily
- Single day



Spread loading

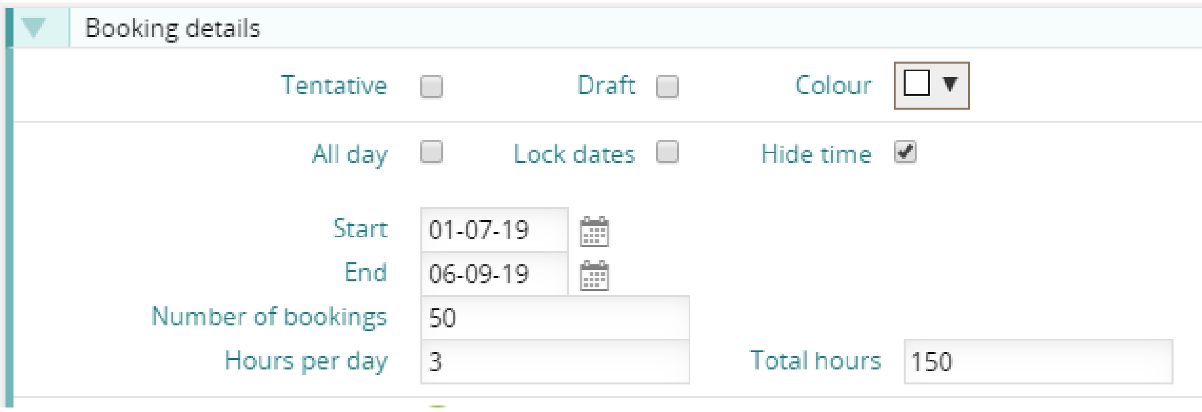
The ability to enter dates, the total number of hours for a booking and the hours per day, and for the system to calculate the spread loading. This is useful for consultancies who have agreed to allocate a budget over an extended period. Variations of this are possible:

Example 1:

Specifying Start date, Hours per day and Total hours

Start date	1st July
Hours per day	3 hours
Total hours	150 hours

Result:
By inputting the above data, the system calculates 50 bookings are required and sets the end date accordingly.

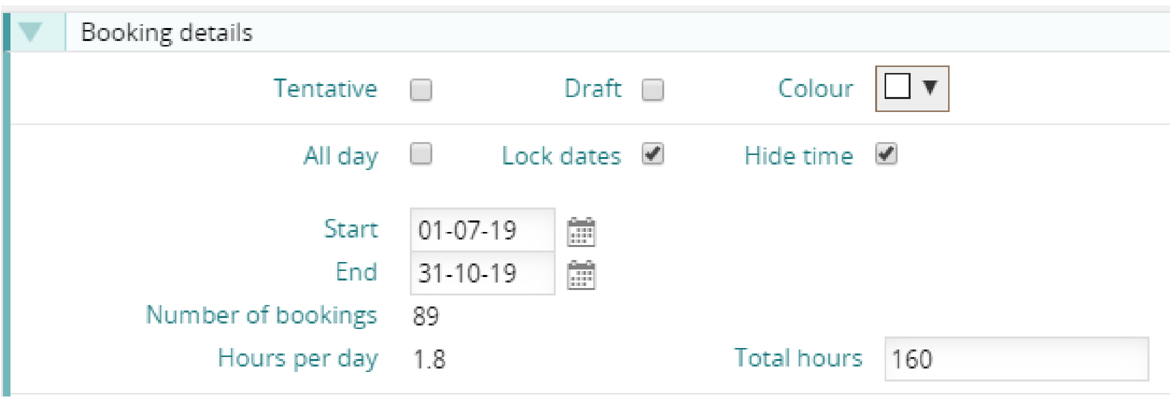


Example 2:

Specifying Start date, End date and Total hours

Start date	1st July
End date	31st October
Lock dates	Checked (required to stop the dates from changing)
Total hours	160 hours

Result:
The system calculates 89 bookings are required at 1.8 hours per day.

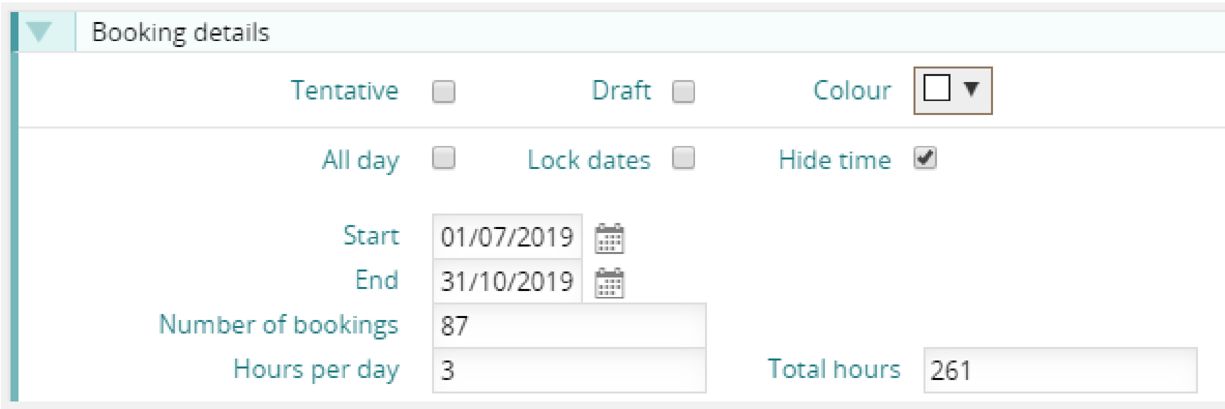


Example 3:

Specifying Start date, End date and Hours per day

Start date	1st July
End date	31st October
Hours per day	3 hours

Result:
The system calculates 87 bookings are required totaling 261 hours.



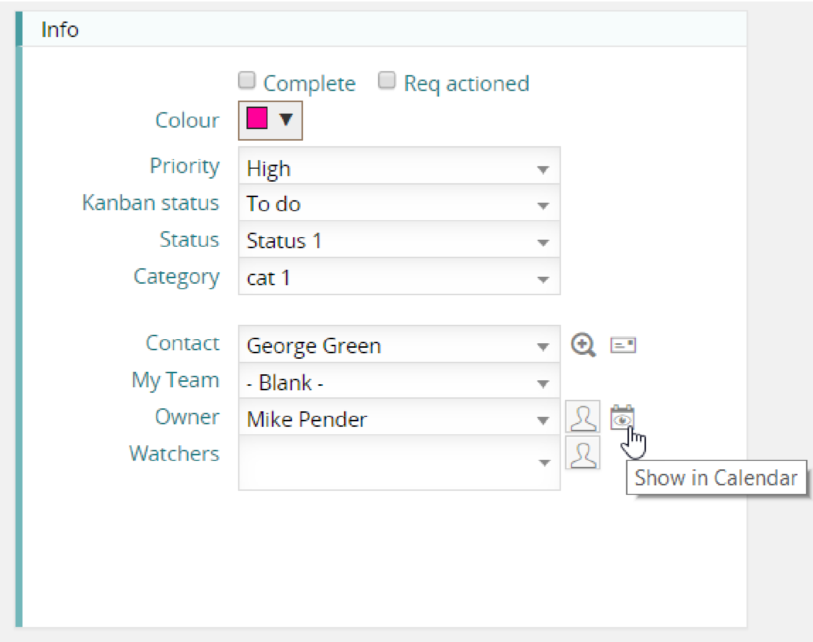
Option to show activities in Calendar

For companies wishing to use requisitions as work tickets, these can now be automatically displayed in the calendar based on the start and due dates of the activity.

The traditional 'Waterfall' approach created time estimates, dropped them into a calendar to allocate the work to staff, and then had staff create timesheets against the estimates either via MyCalendar or Weekly Timesheets. This new feature provides for a more Agile working method, enabling teams to use requisitions as simple work tickets. This Agile approach specifies the required work using requisitions and work tickets visible on Kanban boards and in Synergist calendars. Staff simply create and submit timesheets using the Quick timesheet feature within the requisition. (Please refer to the 'Activities' section of this document for more information.)

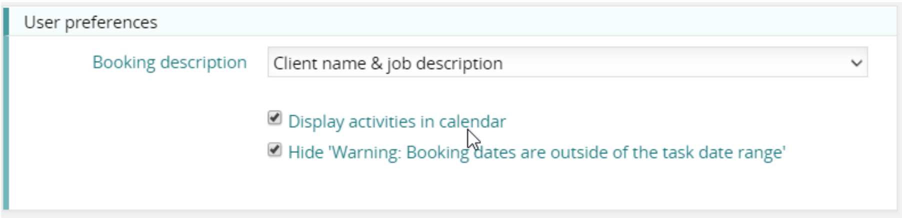
Enabling an activity to be visible in calendars

The default setting for activities and requisitions to be included or hidden from calendars is set by the Activity types table in File Maintenance. However, activities and requisitions can be individually set up to be included or hidden from calendars.



Activities in the Calendar view

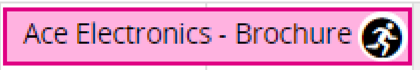
Including activities in the calendar view is enabled in 'Preferences' in both 'Calendar bookings' and 'MyCalendar'.



(CALENDAR BOOKINGS CONTINUED ...)

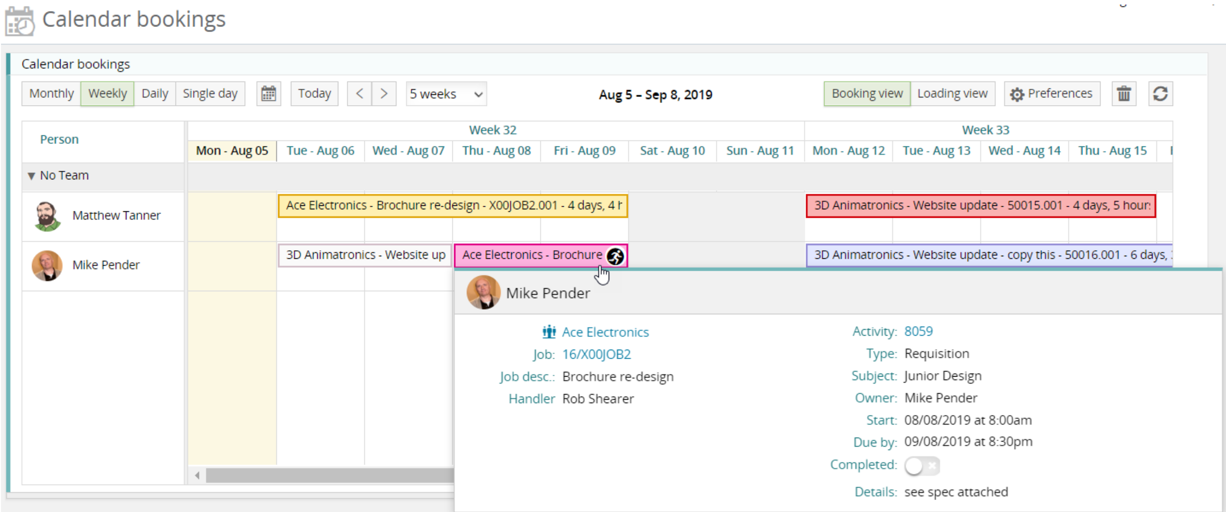
Activity icon

The running person icon is used to identify activities in the calendar. The background colour of the bar is set in the activity record.



Calendar showing bookings and activities

Activities in a calendar can be moved and resized. To edit an activity in the calendar, click on the activity bar and the activity will open in a new tab.

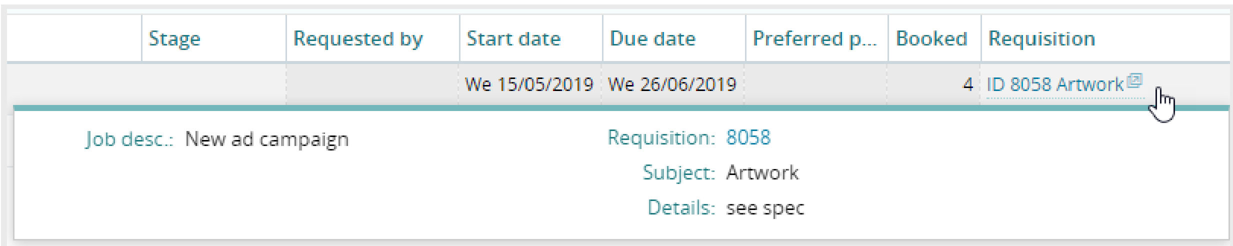


Start date added to requisitions / activity records

Previously, activity records only supported a 'Due date'. A new 'Start date' column has been added and can be used to indicate the planned commencement date for a requisition. The 'Start date' can also be used to trigger alerts.

To view the 'Start date' in the requisitions list:

- Select 'Calendar bookings' in the main menu
- Click the 'Get requisitions' button



Hiding start and end times

Booking without time of day

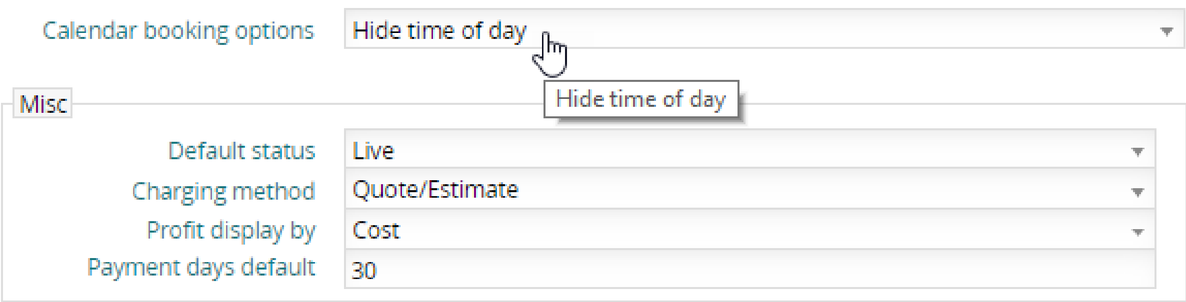
Consultancies typically book work into calendars using hours per day rather than time of day. For those users who prefer this way of working, it is now possible to hide the start and end times of a booking.

Company settings

To switch on this feature:

- Navigate to Settings
- Select 'Companies' from the drop-down list
- Click on the required company
- Choose the 'Defaults' tab
- Locate 'Calendar booking options' drop down-menu
- Select 'Hide time of day'

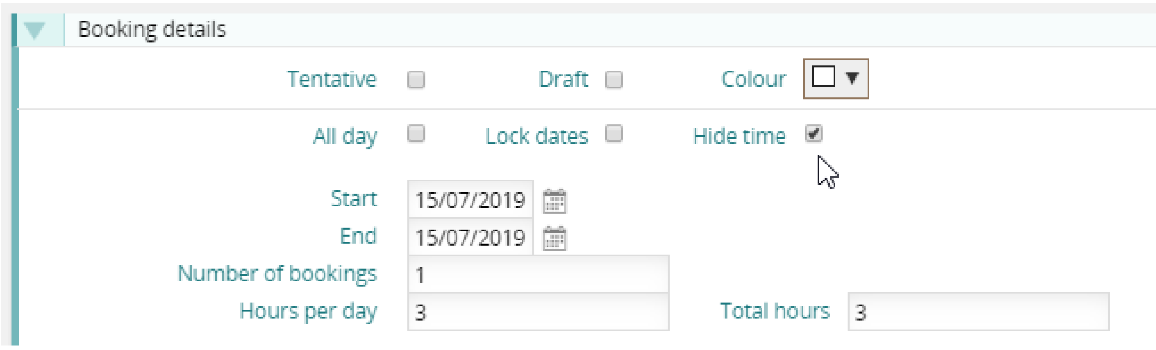
This sets the default for all new calendar bookings to hide the start and end time of a booking. It also auto hides any features that rely on the start and end time being used.



Note: If working with multiple companies, all companies that have been selected to be in the same view in Calendar bookings must be given the same setting for this feature to work correctly.

Booking details window

With 'Hide time' set, the start and end times of day are hidden.



Once 'Hide time' has been selected, the following features are turned off:

Calendar bookings

- The daily view
- The weekly view
- Start-end times in calendar preferences

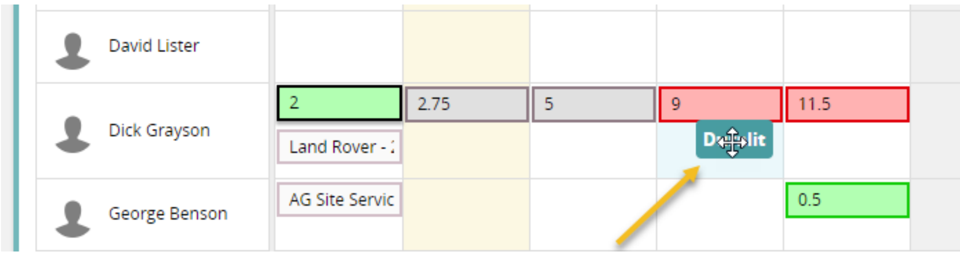
MyCalendar

- The week view
- The day view

Loading view – Ability to create a booking

In the loading view, it is already possible to click the loading bar and move/amend the bookings associated with the loading. This has now been enhanced to allow the user to drop a new booking into this view. Once the booking has been edited or stretched, the booking disappears and the loading for the cell is refreshed.

Booking being dropped on to the loading view



Auto scrolling

The auto scroll feature assists when dragging a job estimate or requisition to a destination that is not on the screen.

To view this feature:
- Select ‘Calendar bookings’ in the main menu
- Click the ‘Get job estimates’ or ‘Get requisitions’ button
- Drag a job estimate or requisition onto the calendar

Calendar bookings estimate and requisitions list

- Job and phase descriptions formatted into separate columns
- Phase description added to Requisition list

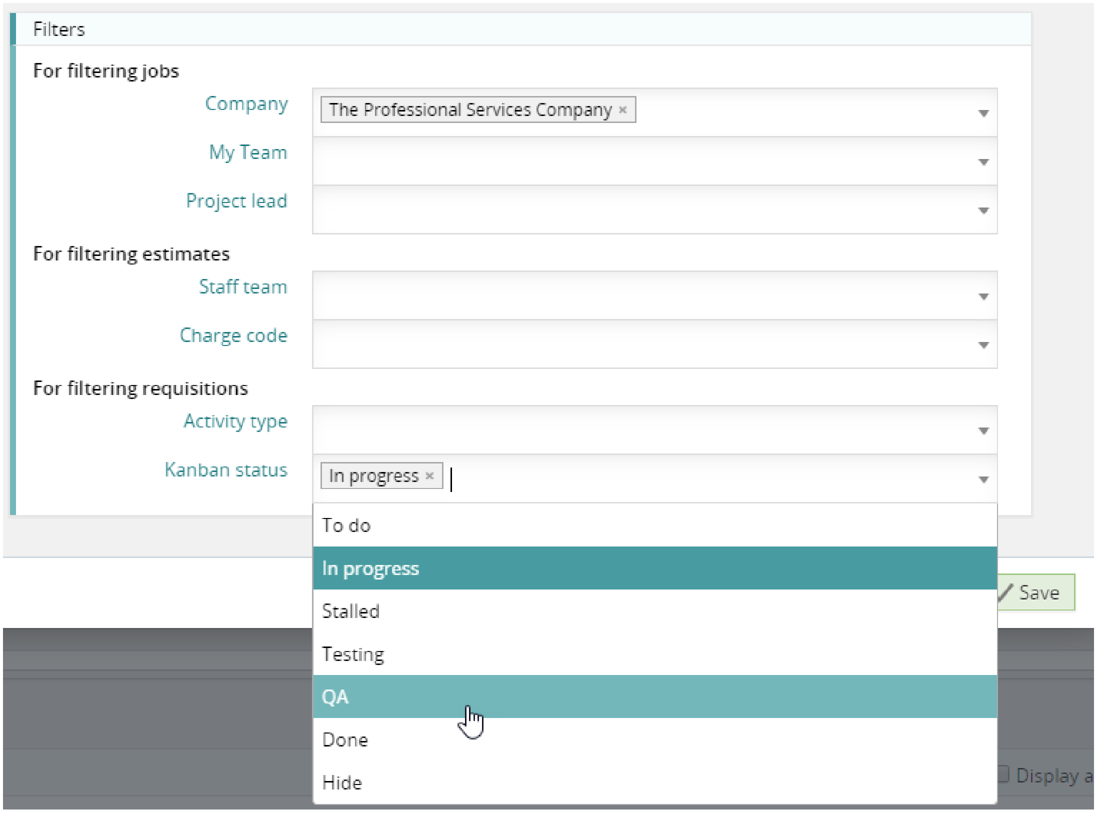
Kanban status filter for requisitions in Calendar bookings

When viewing a list of requisitions in 'Calendar bookings', the items in the list can be filtered by Kanban status.

To access this feature:

- Select 'Calendar bookings' from the main menu
- Locate and click the 'List preferences' button on the right-hand side of the screen

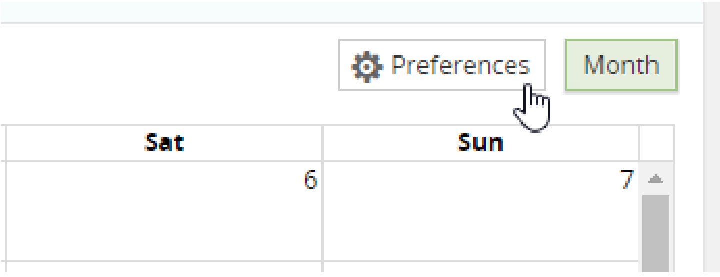
- Select one or more Kanban statuses for filtering
- Click 'Save' or 'Cancel' to apply the filter and to close the 'List preferences' window



CALENDAR – MYCALENDAR

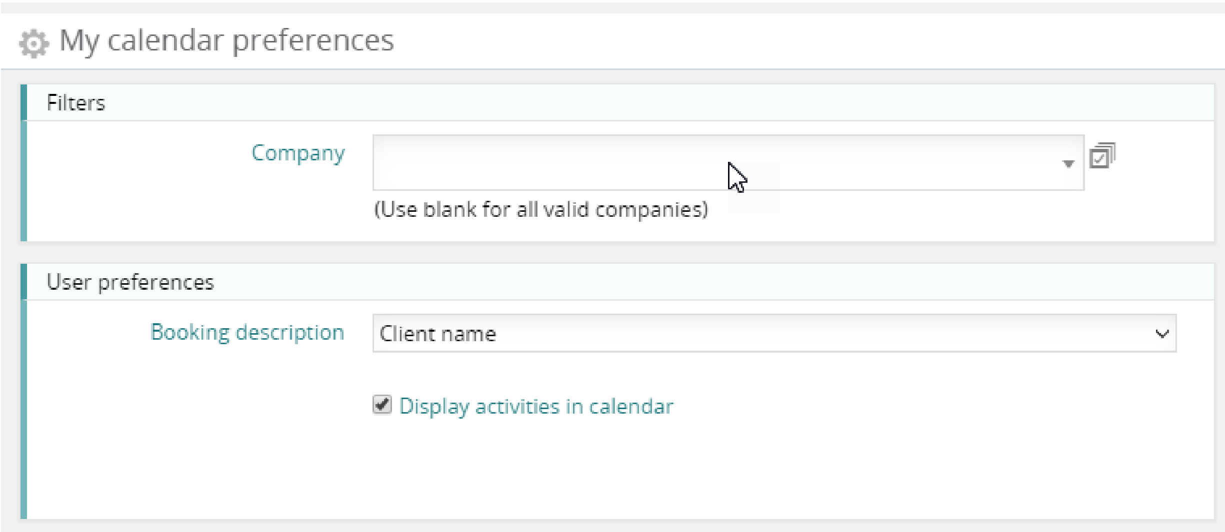
Preferences

A 'Preferences' button has been added to MyCalendar.



Company filter

It is now possible to select which companies to include in the calendar view. To see bookings for all companies, leave the option blank.



Booking description

The selected description applies to bookings and any activities displayed in the view.

Options

- Client name
- Client name & job description
- Job description
- Phase description
- Activity subject (normally a requisition)

Display activities in calendar (tick box)

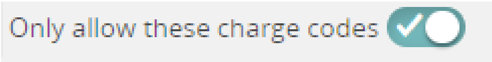
This feature gives the option to include activities in the calendar view. For an activity to be included in the calendar view:

- the user must be the owner of the activity and
- the activity has been set to be visible in calendars

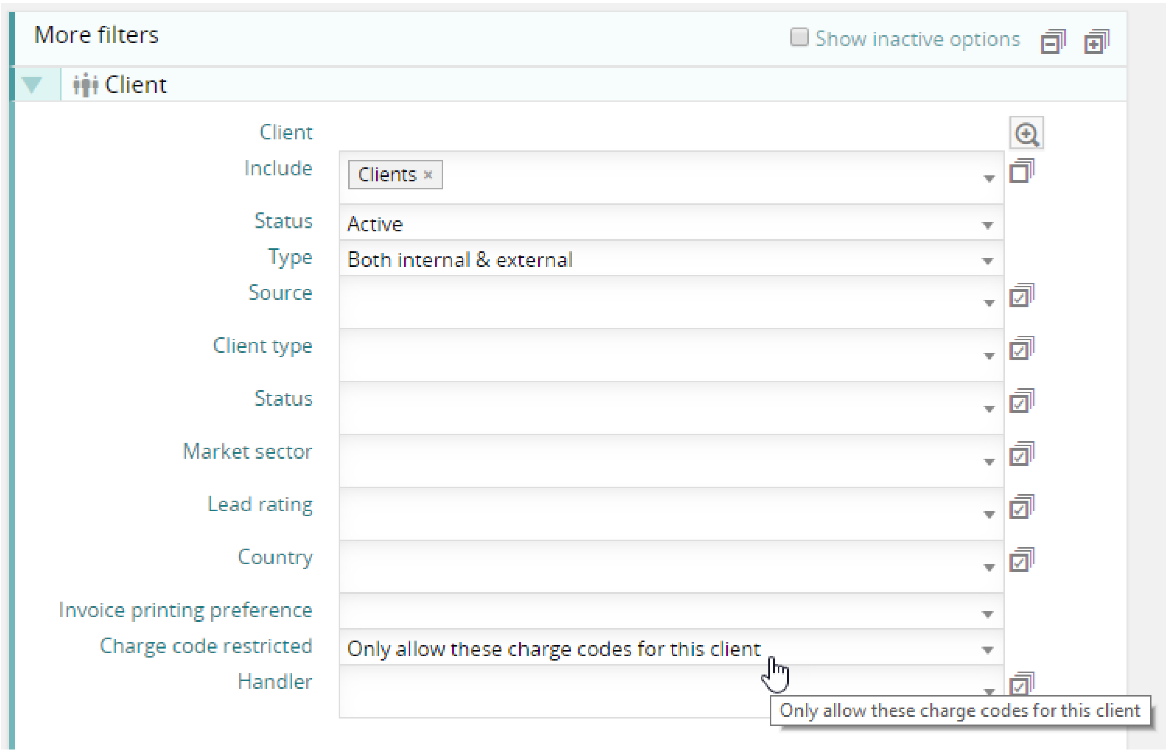
CLIENTS, PROSPECTS & LEADS

New filter option in Client list - Charge code restricted

This new filter enables the user to identify all those clients that have special prices where 'Only allow these charge codes' has been selected for the client.

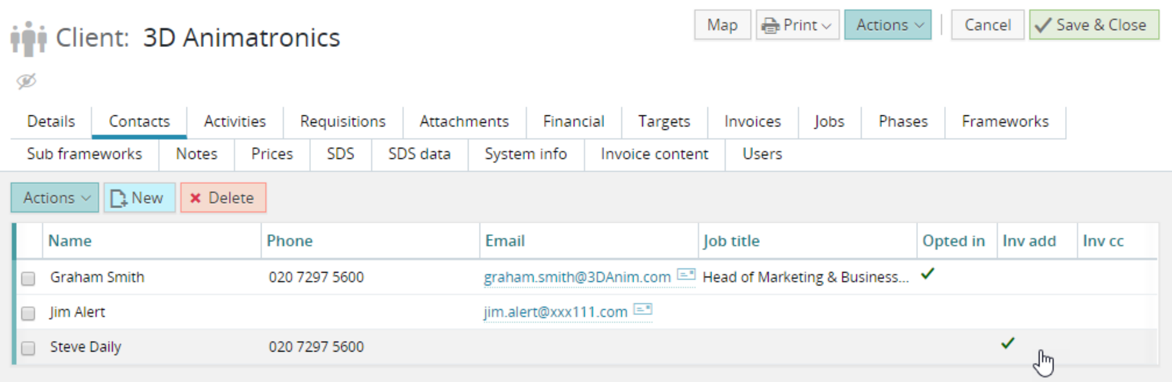


Client filter



CLIENT & SUPPLIER CONTACTS

Invoice address flag displayed on Client contact list

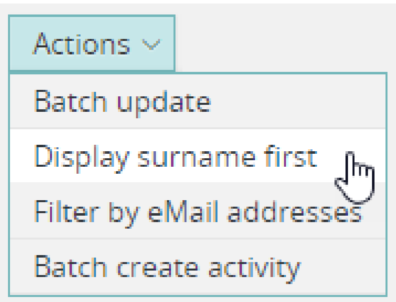


Surname / first name order

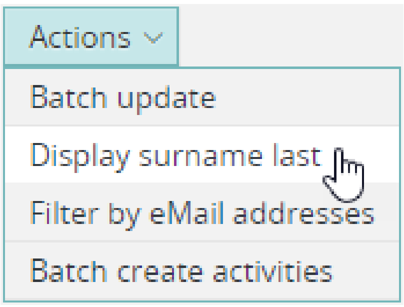
When displaying first names and surnames, the default setting shows the surname first. The 'Surname / first name' order can be swapped when viewing the Client and Supplier contact lists.

To access this feature:

- Select 'Client contacts' or 'Supplier contacts' in the main menu
- Click the 'Actions' button
- Choose the appropriate 'Display surname first' or 'Display surname last' option



or



Automatic domain name for email addresses

When adding a new client or supplier contact, the email address domain is now automatically entered into the email address field. The user can enter the email address to the left of the @ sign. This saves the user typing out the domain name for every contact created.

If nothing is entered to the left of the @ sign, the domain text is cleared and won't be stored when saving the record.

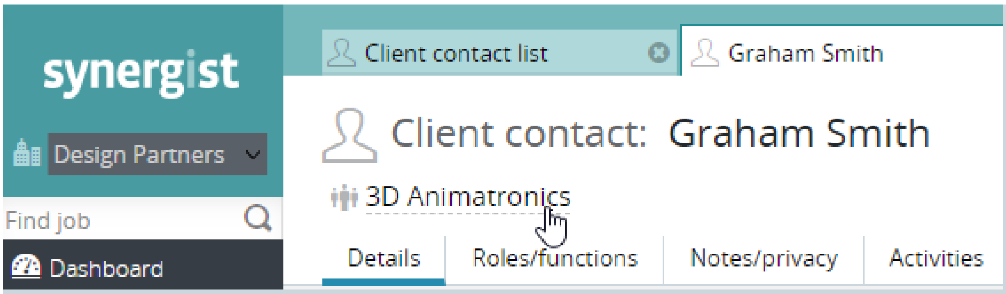
- **name@hotmail.com**
  This email address includes a name and will be saved

- **@hotmail.com**
  This email address doesn't include an email address and won't be saved.

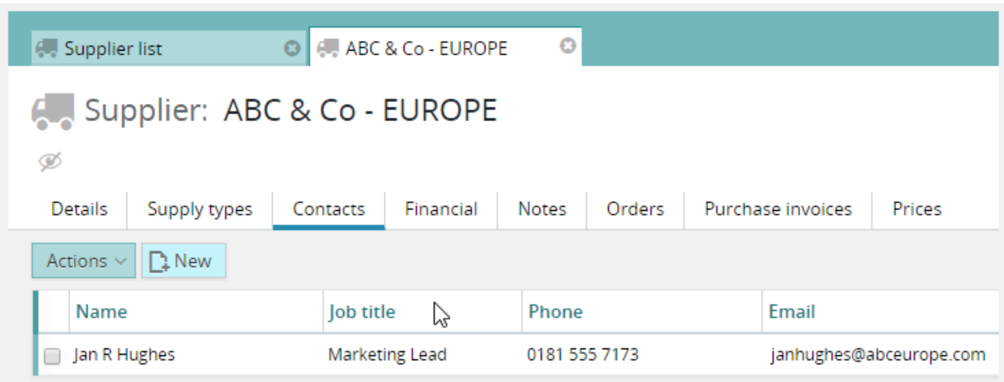
New link from 'Client contact' to 'Client'

To improve navigation, there is a link in the 'Client contact' screen to the main 'Client' screen.

To view this feature:
- Select 'Contacts' in the main menu
- Open one of the contacts in the 'Client contact list'
- Click the client link towards the top of the screen



Job title column added to Supplier contact



Linked clients

New section added to the Notes tab of a client card listing any parent clients.

EMAIL & PDFS

Creating an email in a cloud email client

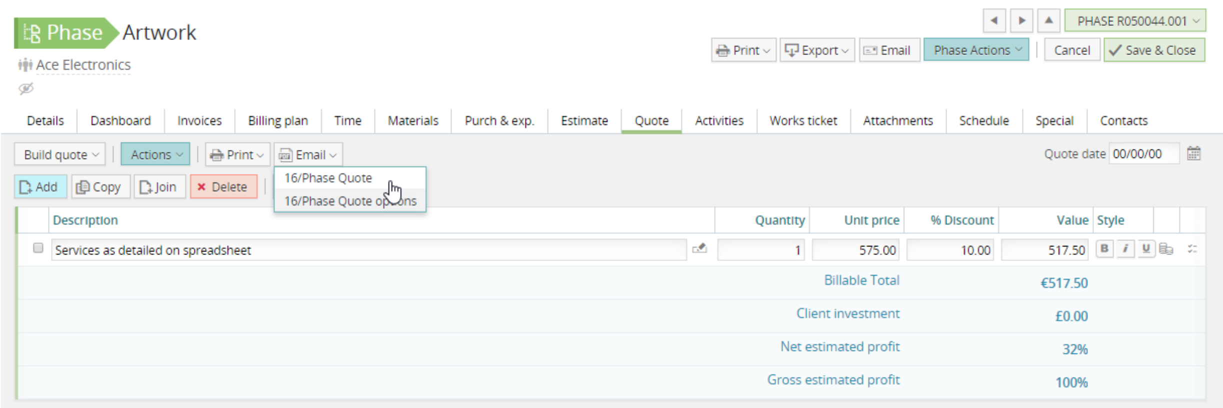
If using Gmail or Microsoft outlook (Office 365), emails can be created using the email address stored against contacts in Synergist. This feature is particularly useful if wishing to send a Synergist generated quotation or PDF of an invoice/purchase order.

Creating emails and attaching PDFs is supported in the following areas:

- Quoting
- Invoicing
- Purchasing

Select the 'Email' button on the Quote screen

Click the 'Email' button and select the required template from the drop-down list.



Select the client contact

Select recipients for the email.

The first time this feature is used, the user needs to select the web email client they are using. This opens a new browser window where the user is asked to sign in and give permission for Synergist to have access to the user's web email client.

Email client

An email is created in the chosen web-based email client and includes the chosen recipient along with a PDF of the quotation document.

ESTIMATING

Time and bookings screen

A new feature, 'Time and bookings', has been added to the 'Estimate' tab. The screen provides a simplified in-line method for building estimates, enabling users to simultaneously create bookings against estimates.

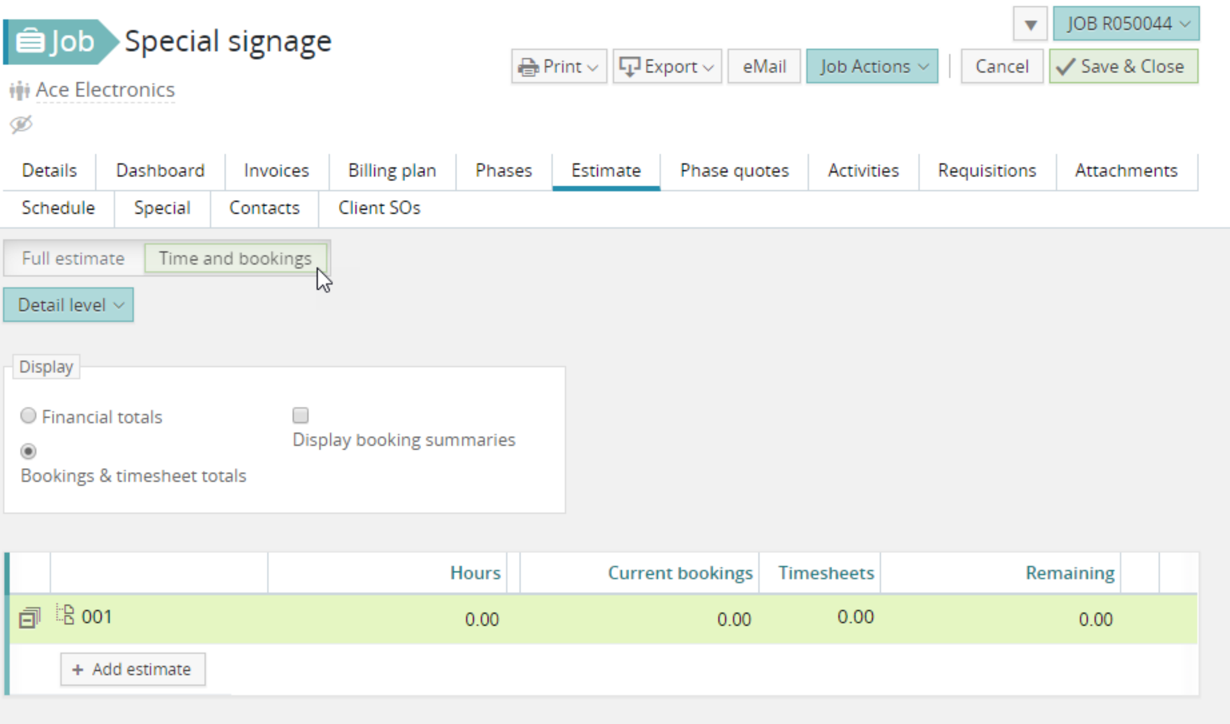
The 'Time and bookings ' function can also be used as a method for analysing remaining budgets on jobs and phases. Users can see original budgets for:

- time (the estimates)
- the total time submitted by staff against budgets
- how much time remains booked into calendars

Any overbooking is highlighted in red, making it easy to identify when a job is likely to go over budget.

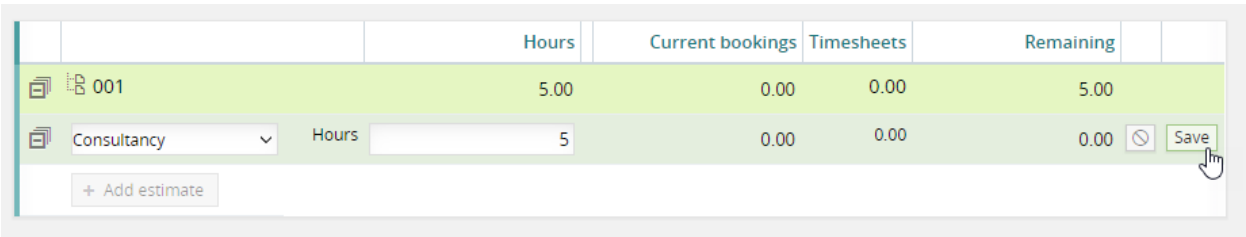
New job – no estimates created

Click on the 'Time and bookings' button to open the new interface.



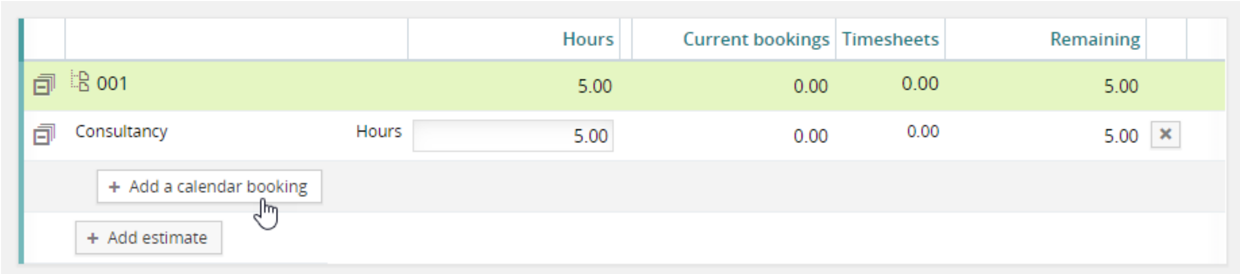
Create an estimate

Time estimates can be created from here.



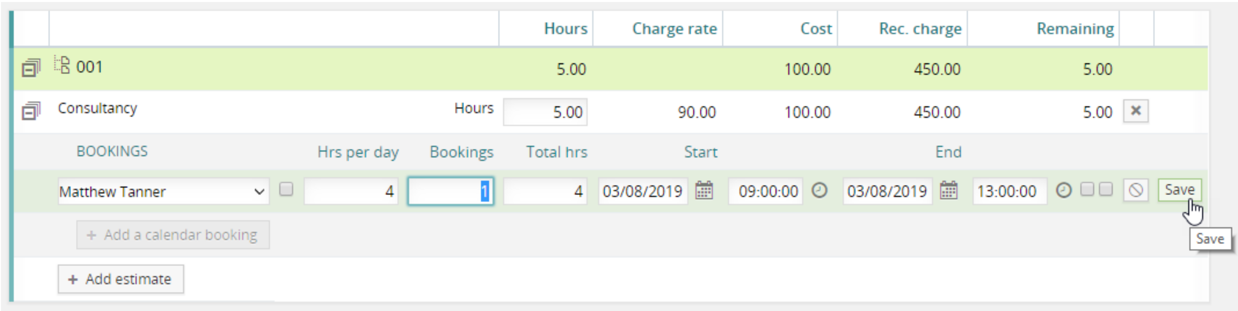
Create a calendar booking

Once an estimate has been created, bookings may be created for it in the calendar.



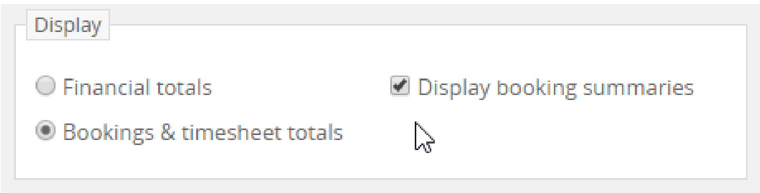
Adding a booking

If ticked, the initial checkbox indicates all day bookings. Untick the box to book less than a full day. The next step is to type in the number of bookings or use the dates to calculate the number of bookings automatically.

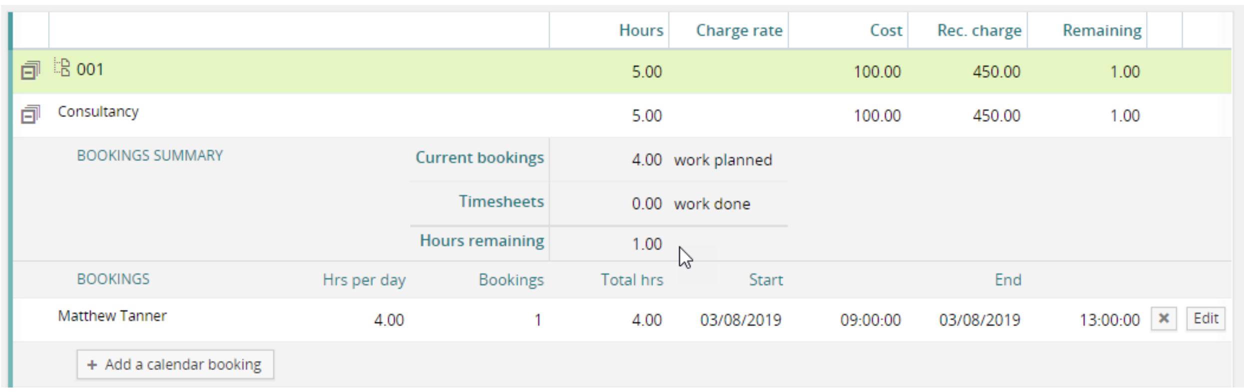


Booking summary

The 'Display booking summary' option shows information regarding bookings and timesheets related to the estimate. Switch this on in the 'Display' panel.



Using the booking summary has the advantage of displaying the number of hours remaining to be booked into the calendar.

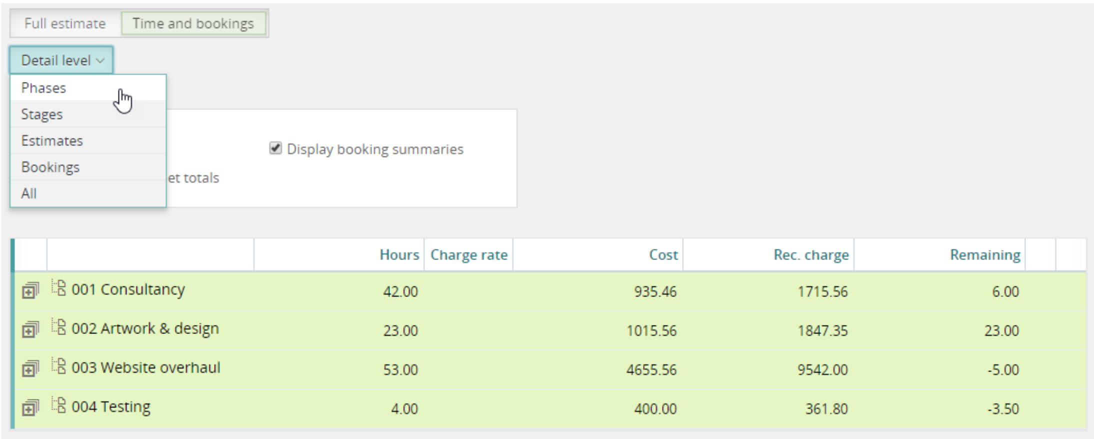


Rolled up views.

When multiple estimate lines have been created over multiple phases, and calendar bookings have been created in allocating the work, various rolled up views are available to make it easier in managing this amount of data.

Detail levels – Phase

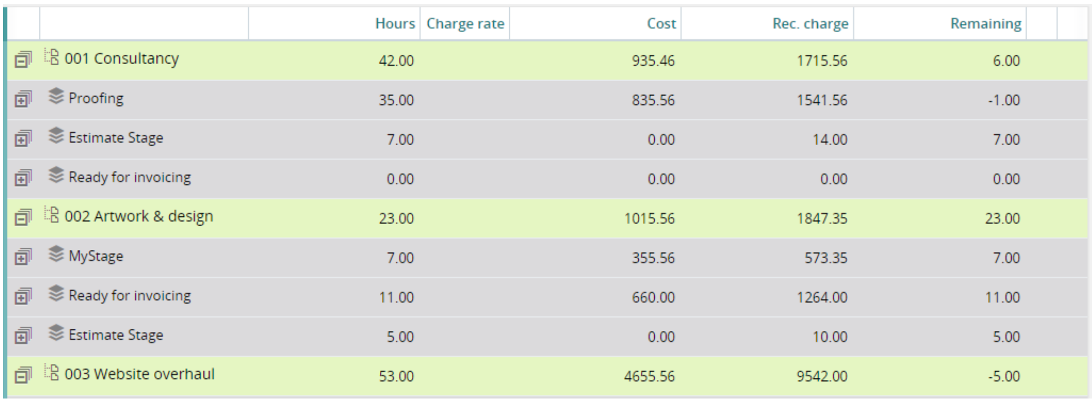
If 'Phases' is selected from the 'Detail level' drop-down list, the view collapses to phases.



	Hours	Charge rate	Cost	Rec. charge	Remaining
001 Consultancy	42.00		935.46	1715.56	6.00
002 Artwork & design	23.00		1015.56	1847.35	23.00
003 Website overhaul	53.00		4655.56	9542.00	-5.00
004 Testing	4.00		400.00	361.80	-3.50

Detail levels – Stages

If 'Stages' is selected from the 'Detail level' drop-down list, phases and stages are displayed.



	Hours	Charge rate	Cost	Rec. charge	Remaining
001 Consultancy	42.00		935.46	1715.56	6.00
Proofing	35.00		835.56	1541.56	-1.00
Estimate Stage	7.00		0.00	14.00	7.00
Ready for invoicing	0.00		0.00	0.00	0.00
002 Artwork & design	23.00		1015.56	1847.35	23.00
MyStage	7.00		355.56	573.35	7.00
Ready for invoicing	11.00		660.00	1264.00	11.00
Estimate Stage	5.00		0.00	10.00	5.00
003 Website overhaul	53.00		4655.56	9542.00	-5.00

Detail levels – Estimates

If 'Estimates' is selected from the 'Detail level' drop-down list, phases, stages and estimates are displayed.

	Hours	Charge rate	Cost	Rec. charge	Remaining
001 Consultancy	42.00		935.46	1715.56	36.00
Proofing	35.00		835.56	1541.56	29.00
Artwork - bookable in MyCalend	2.00		0.00	200.00	2.00
CC for jon	0.00		0.00	0.00	0.00
Rail Engineer 1(mike's skill)	4.00		400.00	363.97	4.00
Rail Engineer 2 (mikes defaut)	4.00		55.56	303.81	2.00
Simple	2.00		200.00	301.80	-1.00
Special	3.00		180.00	331.98	2.00
Technical authorship	20.00		0.00	40.00	20.00
Estimate Stage	7.00		0.00	14.00	7.00
Technical authorship	7.00		0.00	14.00	7.00
Ready for invoicing	0.00		0.00	0.00	0.00
Widget making	0.00		0.00	0.00	0.00
002 Artwork & design	23.00		1015.56	1847.35	23.00
MyStage	7.00		355.56	573.35	7.00
Rail Engineer 1(mike's skill) Hours	3.00	90.45	300.00	271.35	3.00
Rail Engineer 2 (mikes defaut) Hours	4.00	75.50	55.56	302.00	4.00

Expand / collapse

Sections can be expanded to show a greater level of detail.

In this example, a phase is expanded to show estimates, but the bookings are still collapsed.

	Hours	Charge rate	Cost
001 Artwork	16.00		308.00
Consultancy	10.00		200.00
Presentation Prep Hours	6.00	0.00	108.00

Click the expand / collapse icon

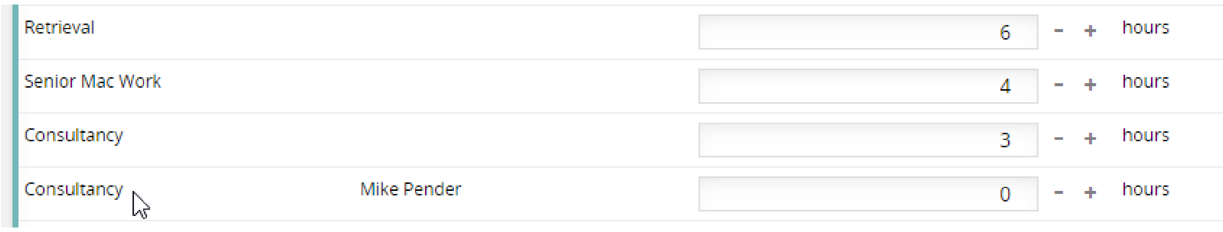
The section is expanded

			Hours	Charge rate
001 Artwork			16.00	
Consultancy			10.00	
BOOKINGS SUMMARY		Current bookings	4.00	work planned
		Timesheets	0.00	work done
		Hours remaining	6.00	
BOOKINGS	Hrs per day	Bookings	Total hrs	Start
Matthew Tanner	4.00	1	4.00	07/08/2019
+ Add a calendar booking				
Presentation Prep		Hours	6.00	0.00

Zero value estimates

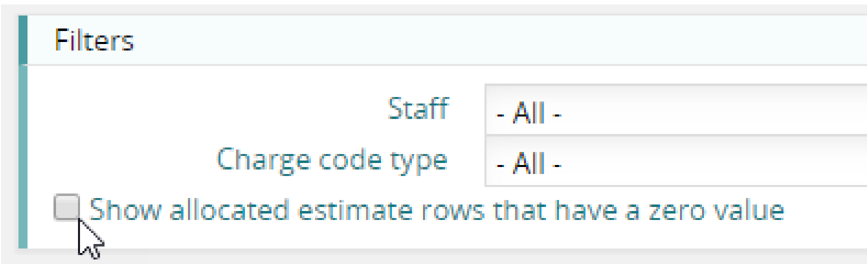
When using the quick estimate feature, by default the screen includes a row for any staff who booked time against the job. This may result in a charge code being displayed multiple times. To hide these items, untick the checkbox 'Show allocated estimate rows that have a zero value'.

Multiple charge codes displayed



Quick estimate

To remove the duplicates, untick the checkbox.

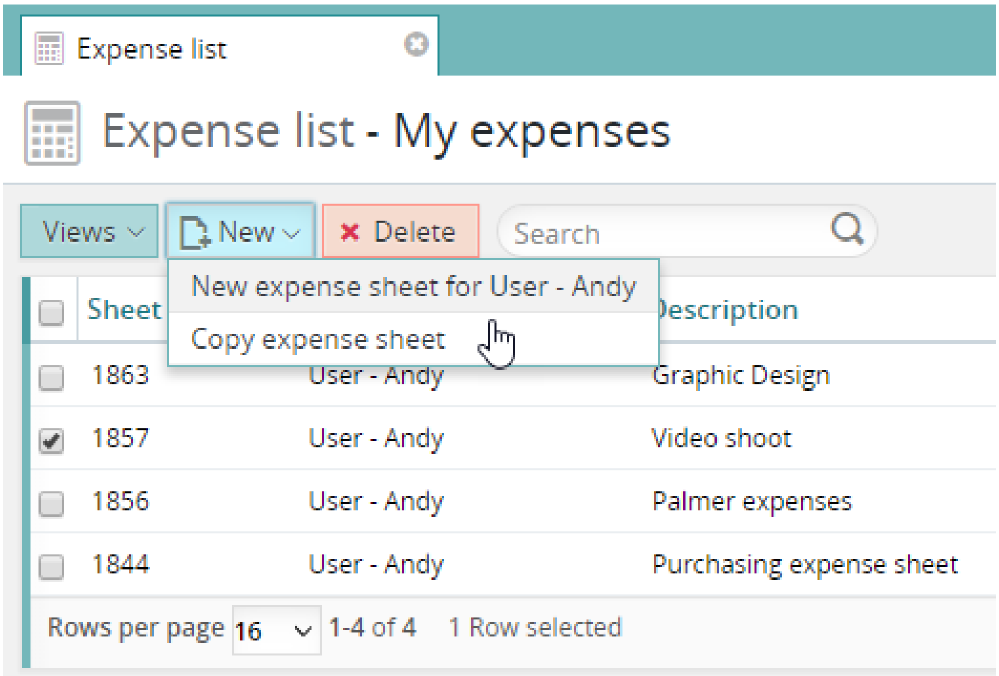


EXPENSES

Copy expense sheet

To access the 'Copy expense sheet' feature:

- Select 'Expenses' in the main menu
- Tick only one of the expense sheets in the 'Expenses list'
- Click the 'New' button
- Select 'Copy expense sheet' from the options

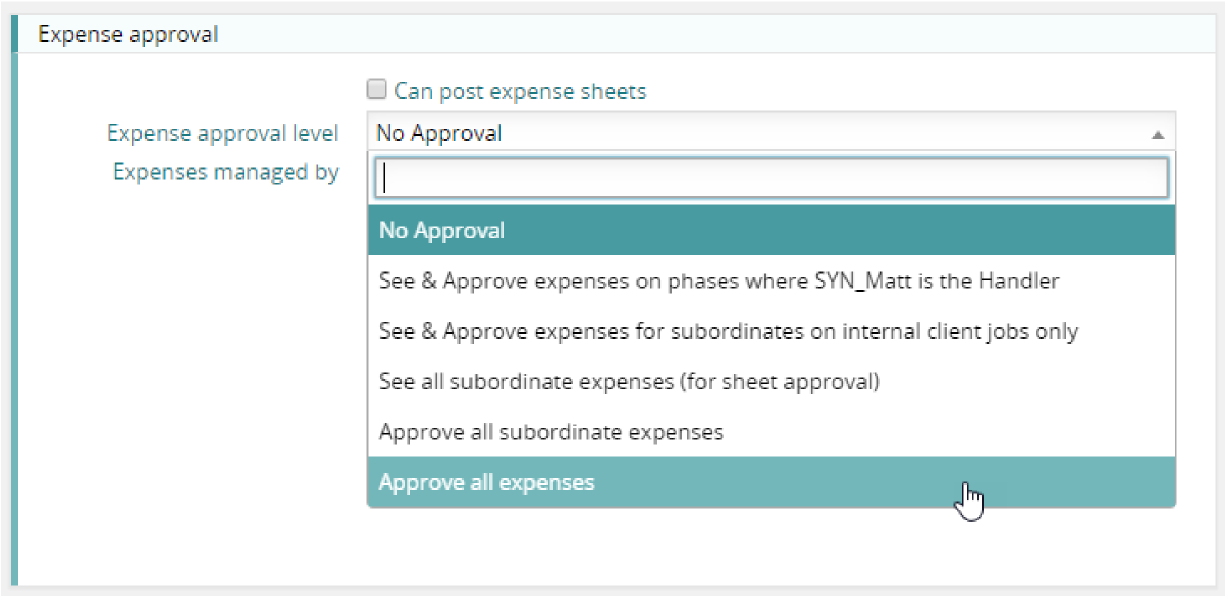


The copied expense sheet displays the current date and its status is 'Unsubmitted'.

Expense approval – Approval options

Expense sheets are now filtered to better support the approval level options specified in the user settings approval tab (Settings > File Maintenance > Users > Approval tab).

Approval level options



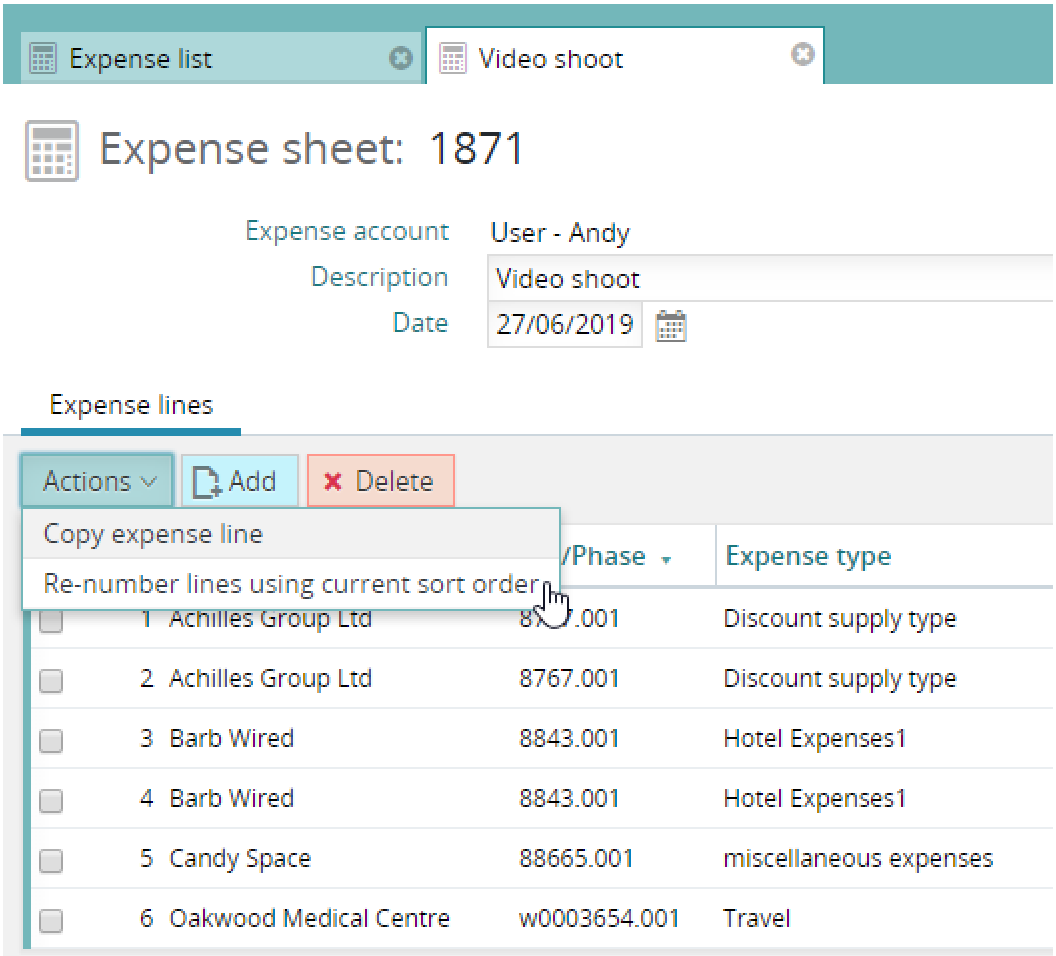
Expense lines order number

The expense line order number updates when expense lines are re-ordered.

After re-sorting, users have the option to use the latest enhancement and renumber the lines, so that the 'Expense sheet' PDF follows the same order as the expense lines.

To view this feature:

- Select 'Expenses' in the main menu
- Open one of the expense sheets in the 'Expense list'
- Click the 'Actions' button
- Choose 'Re-number lines using current sort order'

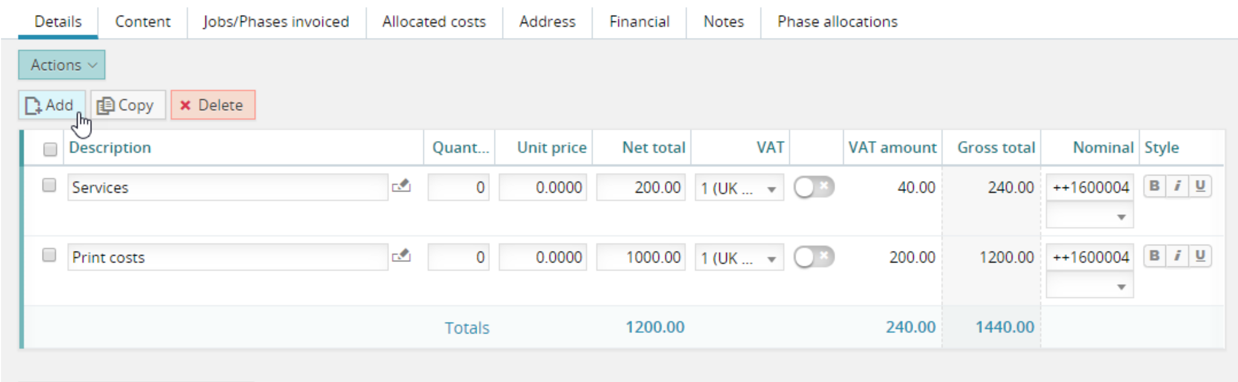


INVOICING

Improvements to the invoicing interface

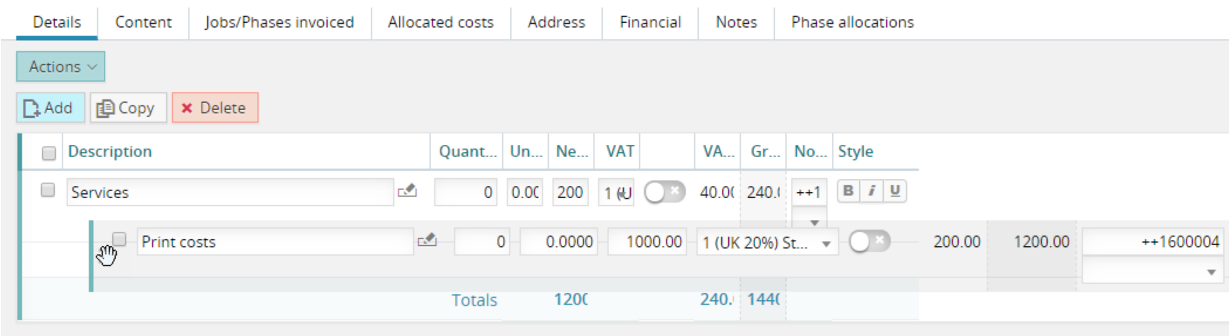
New buttons – Add/Copy/Delete

- Checkboxes have been added to each invoice line
- Add/Copy/Delete options are available on separate buttons



Moving a row

To move a row, click and hold the start of the row, then drag it to a new position.



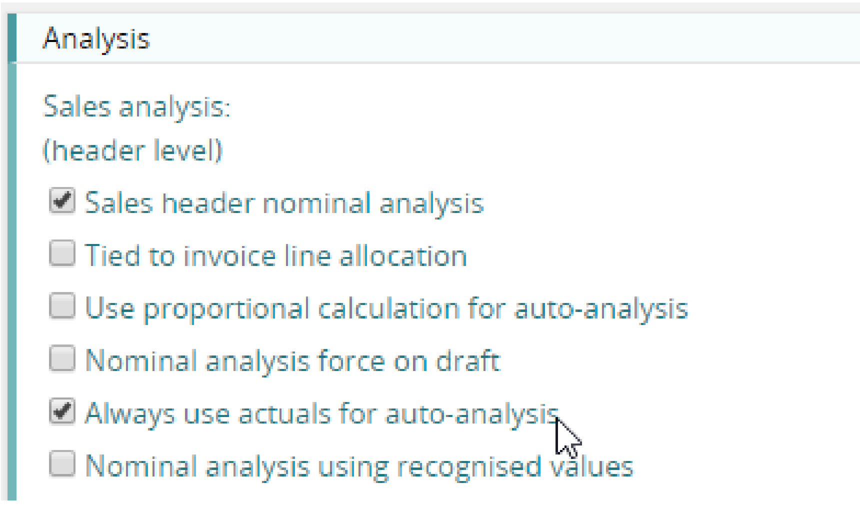
Invoice header auto-analysis

Option to always use actuals for sales header auto-analysis

The sales header auto-analysis feature uses estimates to create nominal codes and values to distribute between nominal codes for an invoice. The only exception is when the invoice content is based on 'Actual Costs'. In this case, the nominal values distributed are based on the costs ticked-off (as billed only).

This new option is a company setting forcing the costs ticked-off to always be used in the nominal code/value distribution for sales header auto-analysis.

Company settings – accounts tab



ASBOF/BASBOF - Invoice levies

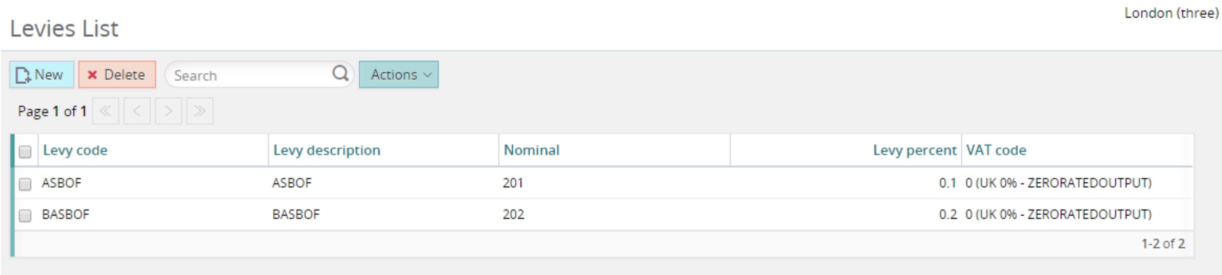
For companies invoicing clients for advertising related services, this feature automatically creates an extra line on invoices when required to bill the ASBOF/BASBOF fee.

Set up

Certain company settings need to be considered in order to use this feature.

The 'Levy percent' is defined in 'File Maintenance' under the 'Levies' section. Check the default values as required.

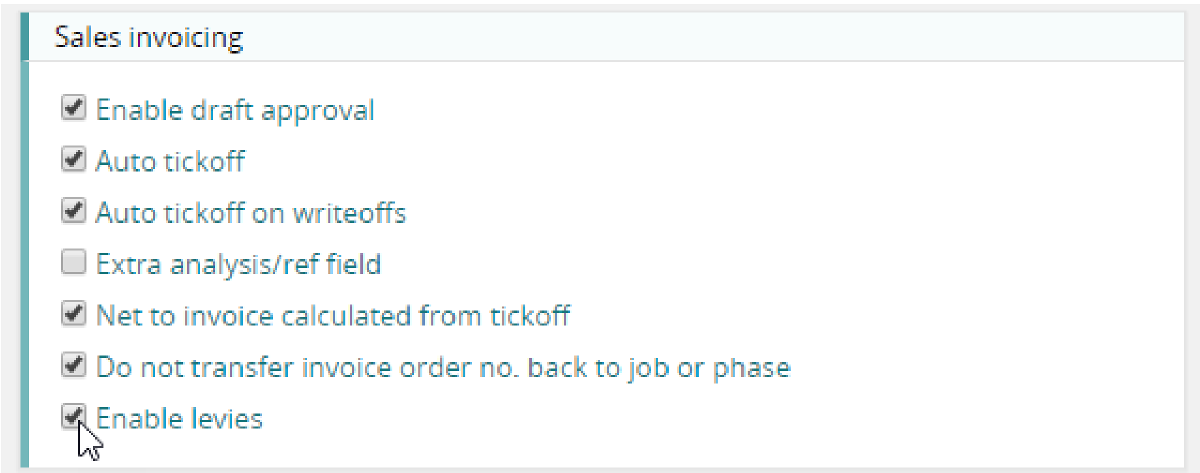
File maintenance



Company settings

To activate this feature:

- Navigate to the 'Company settings List'
- Select the required company
- Click on the 'Switches' tab
- Scroll down and locate the 'Sales invoicing panel'
- Tick the 'Enable levies' option



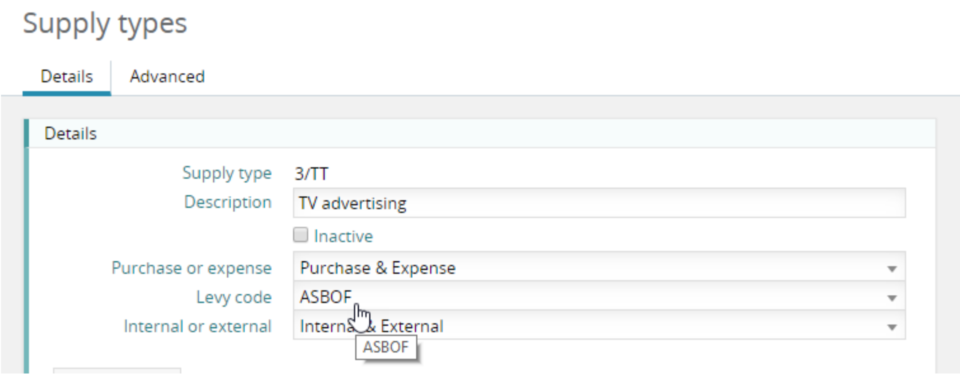
Supply types

If a user bills from costs, they can have the invoice automatically select the correct levy for advertising purchases. This is set up in file maintenance under 'Supply types'.
Any purchase of this type is set to be ASBOF items and auto generates a levy line at the bottom of the invoice.

If billing from costs, the invoice can be configured to automatically select the correct levy for advertising purchases.

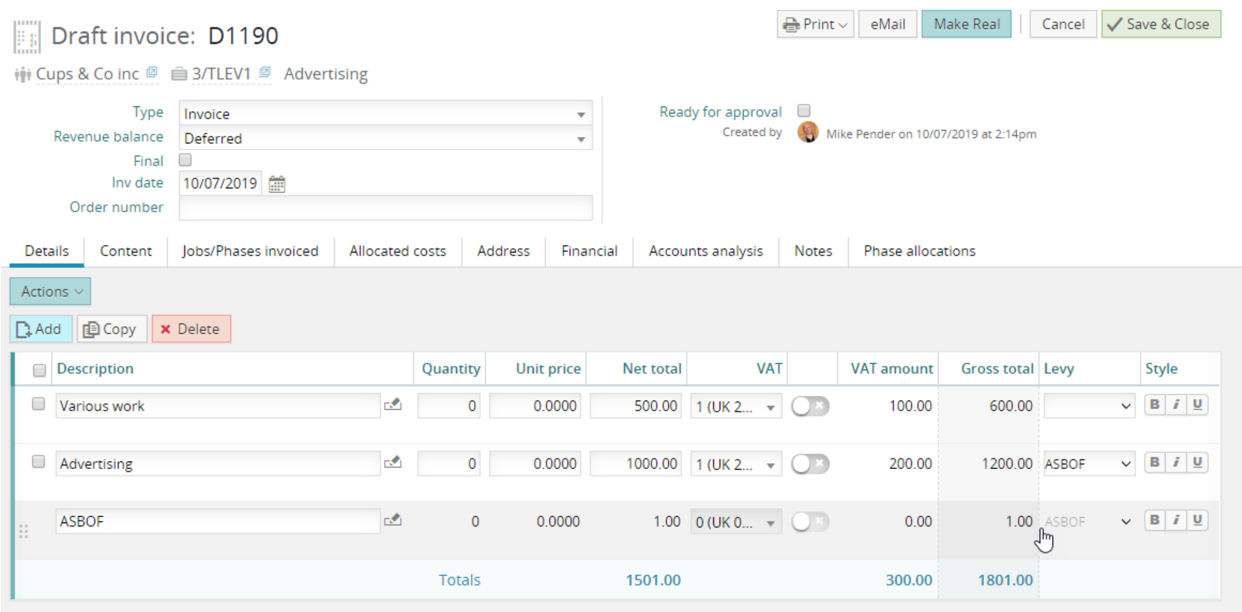
To activate this feature:

- Navigate to 'File Maintenance'
- Select 'Supply types'
- Choose a supply type from the list
- Locate the 'Levy code' drop-down list



Example invoice using the levy feature.

On the draft invoice details screen, use the drop-down list in the Levy column to select the levy type. Selecting a levy option for one or more lines generates an additional line at the end of an invoice with the additional levy fee. Please note that the fee does not form part of the profitability of the invoice and is not included in the phase allocations.



Revenue recognition based on ticked-off costs

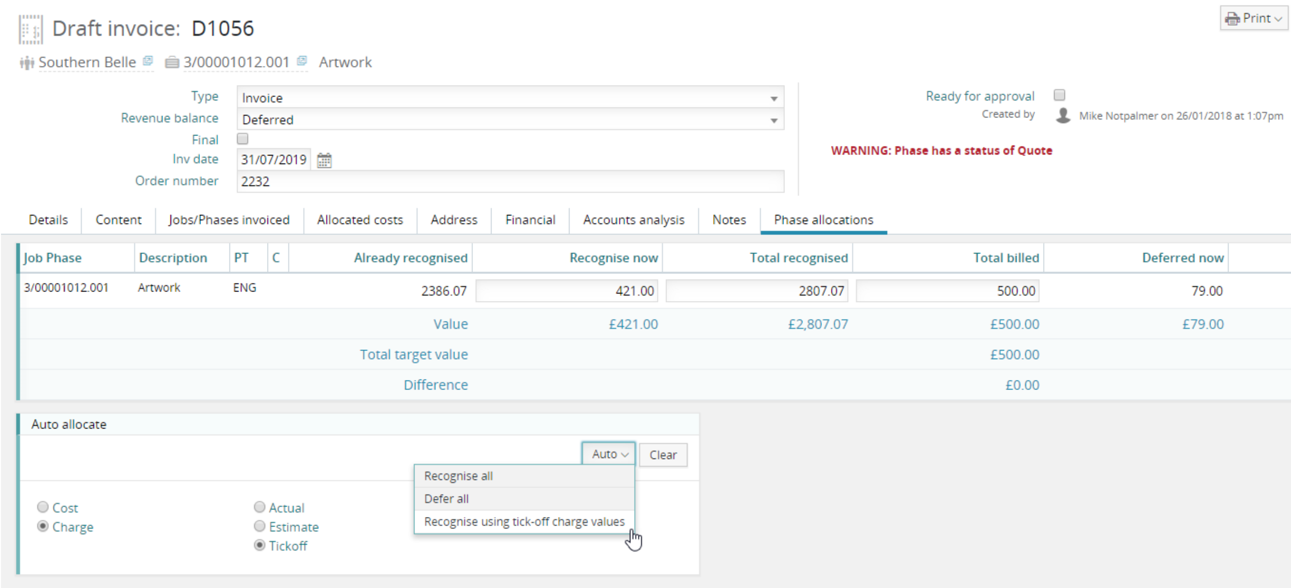
'Recognise using tick-off charge values' is a new option on an invoice's 'Phase allocations' tab.

If selected, the system looks at the total recommended charge value of ticked-off costs and uses this value as the 'Recognise now' figure. Any balance for the invoice is deferred.

Example

In this example, the invoice is for £500 and the associated (ticked-off) costs total is £421.

Clicking the option 'Recognise using tick-off charge values', automatically recognises the £421 and leaves the balance of the invoice (£79) deferred.



Calculator on the Draft invoice Financial tab

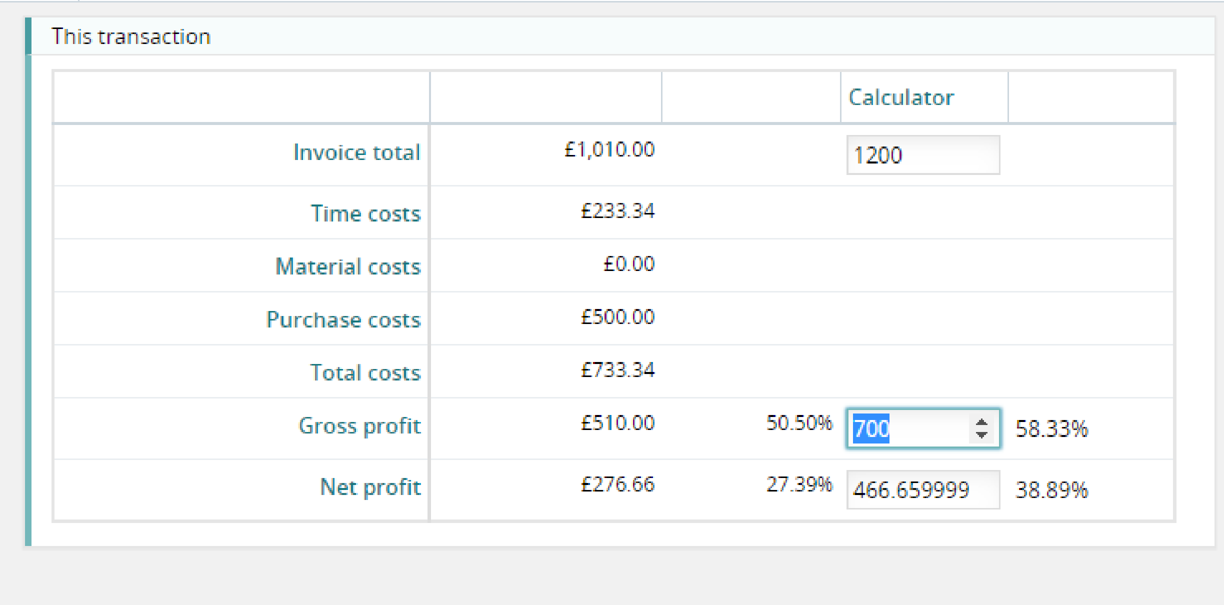
The calculator is used to input figures to help visualise adjustments made to:

- Invoice total
- Gross profit
- Net profit

The numbers changed are not permanent and do not alter the actual draft invoice.

To access the calculator:

- Select 'Draft invoices' in the main menu
- Open a draft invoice in the list
- Choose the 'Financial' tab
- Locate the calculator in the 'This transaction' panel on the right-hand side of the screen

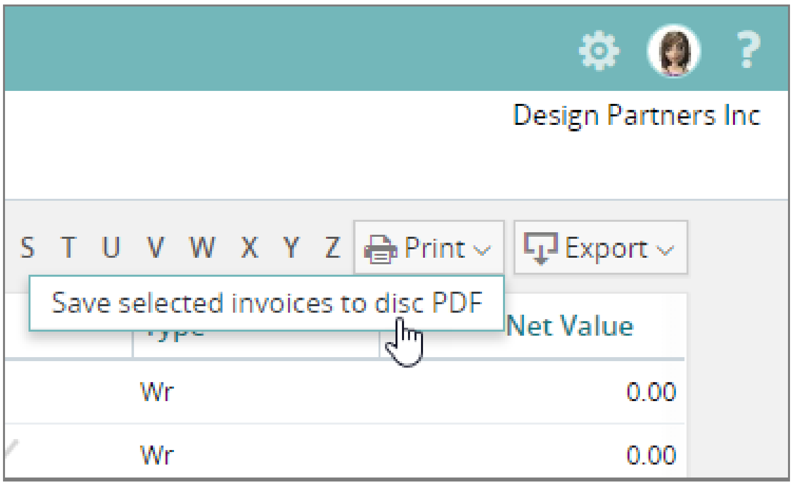


Batch printing invoices and draft invoices (Multiple PDFs)

This new feature enables the batch printing of multiple PDFs for invoices and draft invoices.

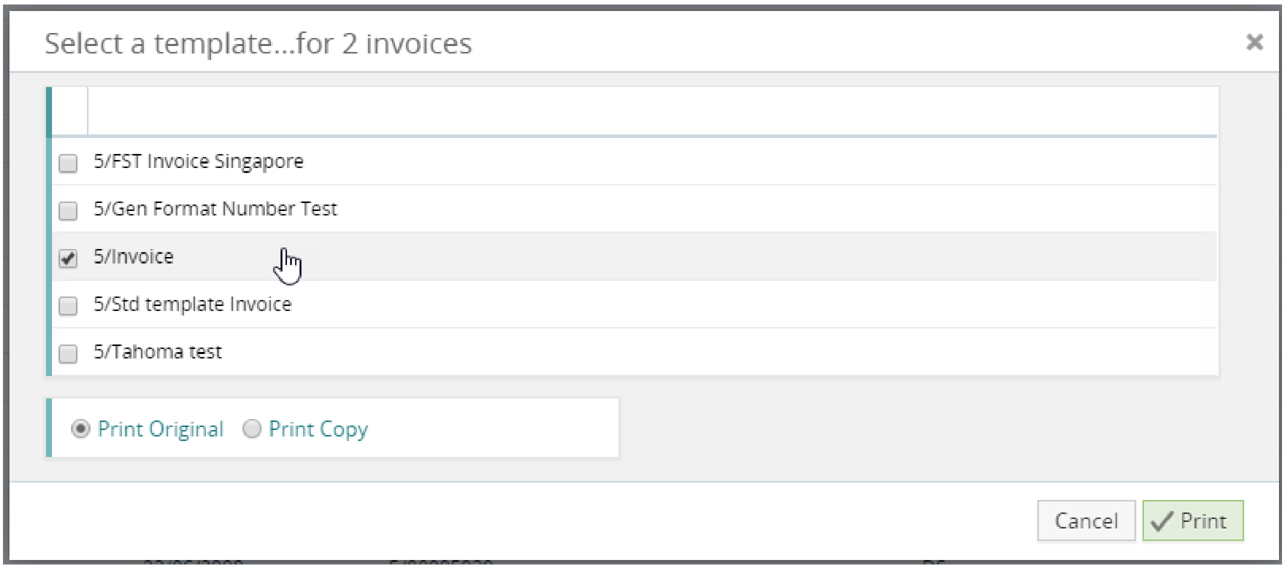
To access the batch printing feature:

- Select 'Invoices' or 'Draft invoices' in the main menu
- Use the tick boxes to select the required invoices for batch printing
- Click the 'Print' button towards the top right-hand corner of the screen
- Choose 'Save selected invoices to disc PDF'



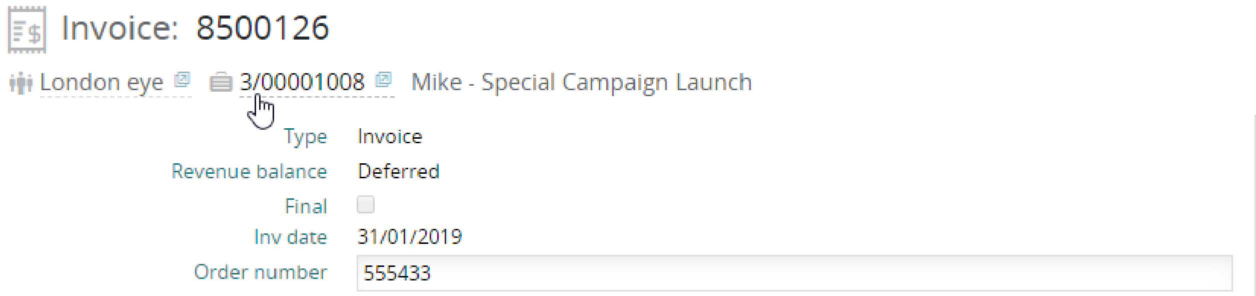
The resulting pop-up window:

- Indicates how many invoices have been selected
- Displays a list of available templates of which one must be selected
- Gives an option to choose either 'Print original' or 'Print copy'



Invoice has clickable links to client and job

When editing a draft invoice, this feature enables the user to open the related client or job in a new tab while keeping the invoice open.



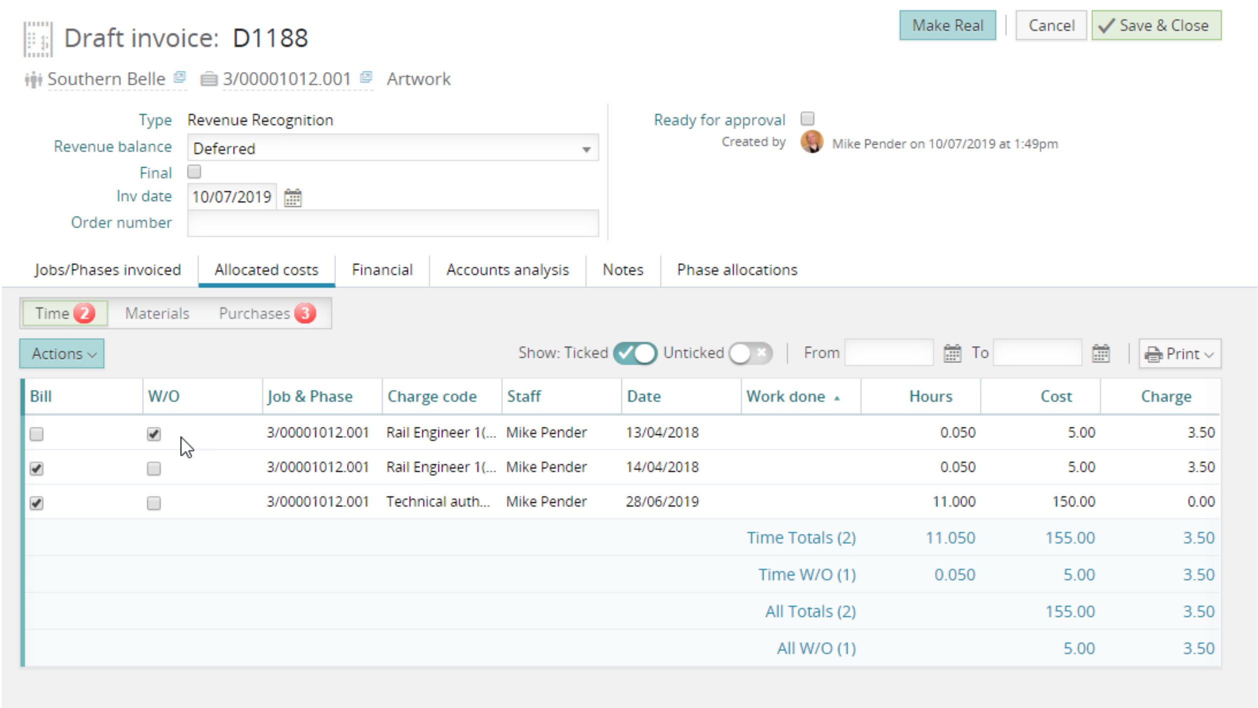
Invoice allocated costs - Enhancements

Opening the 'Allocated costs' tab of an invoice, users can select costs to associate with an invoice. This makes it possible to accurately report on profit by both invoice and period.

This feature has been enhanced to include the following features:

- Option to write off a cost
- Option to filter the unticked costs by date
- Option to sort by column header

Allocated costs screen



JOBS & PHASE

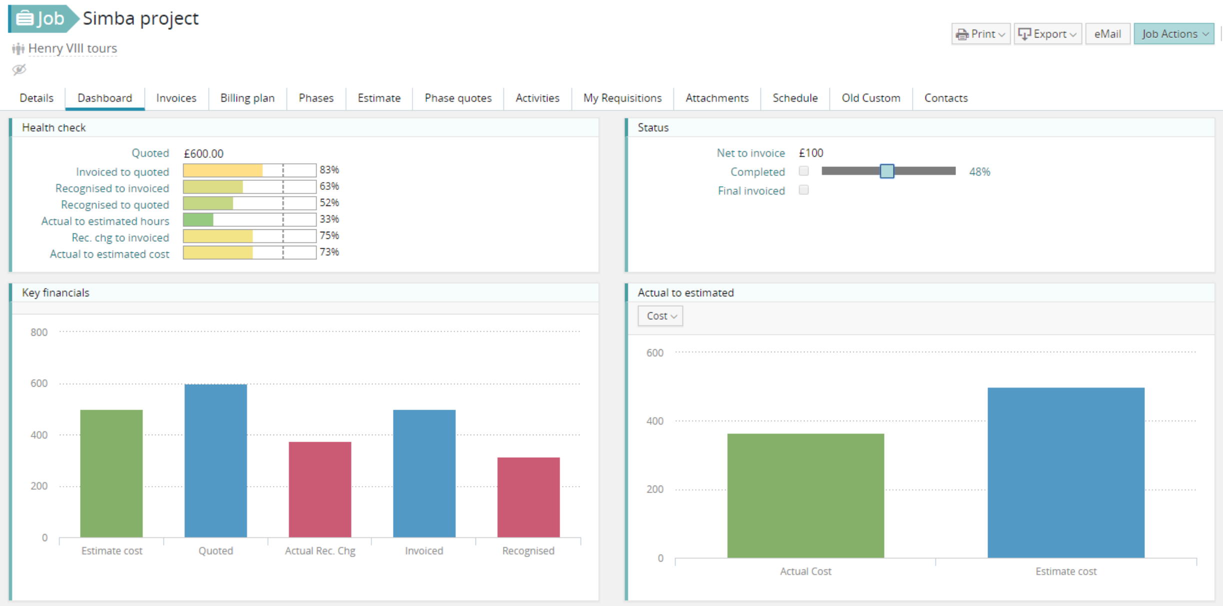
Job and phase financial tab - Enhancements

The financial tab of jobs and phases has been renamed to 'Dashboard'.

New charts have been added to the Dashboard:

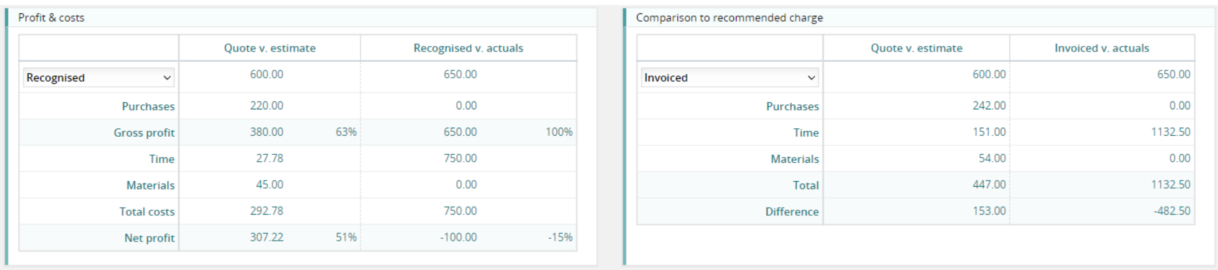
- Key financials
- Actual to estimated

Main charts



Profit & costs / Recommended charge

Clearer view of this key data.



Profit & costs

Recognised	Quote v. estimate		Recognised v. actuals	
	600.00		650.00	
Purchases	220.00		0.00	
Gross profit	380.00	63%	650.00	100%
Time	27.78		750.00	
Materials	45.00		0.00	
Total costs	292.78		750.00	
Net profit	307.22	51%	-100.00	-15%

Comparison to recommended charge

Invoiced	Quote v. estimate	Invoiced v. actuals
	600.00	650.00
Purchases	242.00	0.00
Time	151.00	1132.50
Materials	54.00	0.00
Total	447.00	1132.50
Difference	153.00	-482.50

Completing a job

To mark a job or phase as complete, use the 'Actions' button rather than checking the 'completed' check box.

Billed and un-billed costs

The charts have been amended to show the 'Actual recommended charge' of the costs that have been billed. Previously, total estimated values were displayed.

Billed costs

	Actual cost	Actual rec. charge	Rec. profit	Actual net profit
Purchase	200.00	220.00	20.00	
Time	50.00	40.00	-10.00	
Material	45.00	54.00	9.00	
Total	295.00	314.00	19.00	
Invoiced			500.00	205.00
Difference				-186.00

Additional chart - 'Value (to date)'

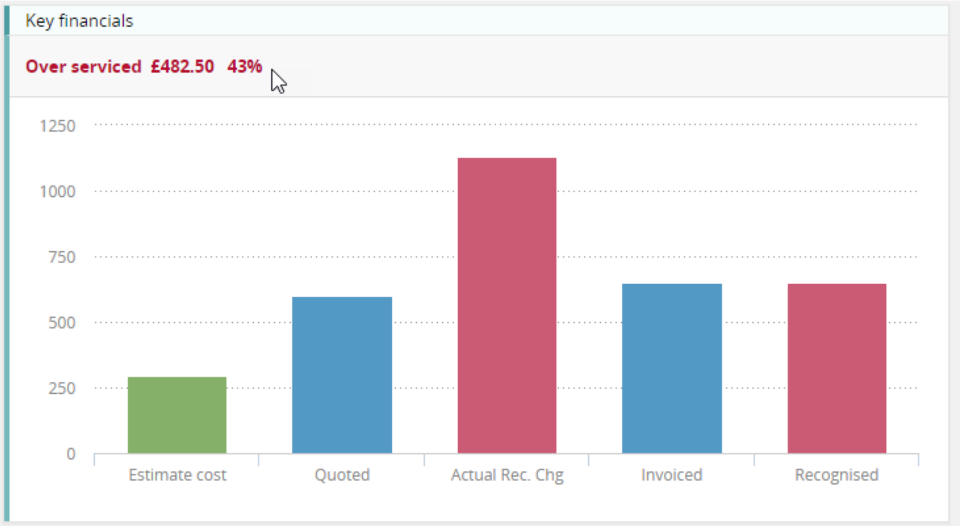
This chart only previously appeared if 'Bill by Time & Materials' was selected. The chart shows the value of the work done to date expressed as gross and net profit figures.

Over / under serviced

Once a job has been closed (final invoiced), the system looks at the recommended charge for the work that has been done, including the recommended mark-up of purchases. The system then compares this to the Net value of what has been invoiced.

If the system finds the amount billed is less than the system recommends for the services provided, based on actual timesheets and not what was estimated, it clearly states this in the key financial panel.

Key financials



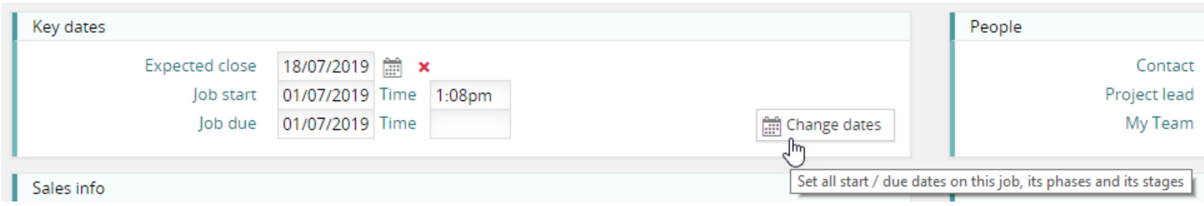
Note: If the total billed exceeds the system recommendation, the system shows a similar figure but in green, stating '**Over charged £x.xx xx%**'. It is highlighted in green because invoicing more than the recommended charge is generally advantageous to the business.

Changing dates at job level – New company setting

If a system is set up with dates being controlled at phase or stage level, it is still possible to change the dates via the job's 'change dates' feature.

The aim of this feature is to make it easier to change all the dates on a job when the system has been set up to have the dates driven at a lower level, for example at phase or stage level.

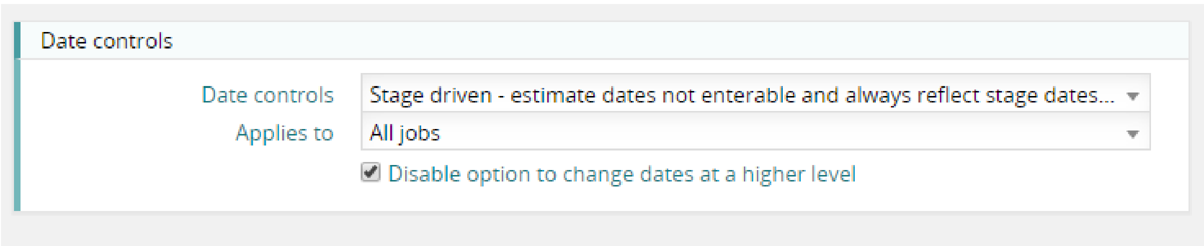
Job card – details tab



Company settings – Advanced tab

To control whether the 'Change dates' button is seen or hidden in the program:

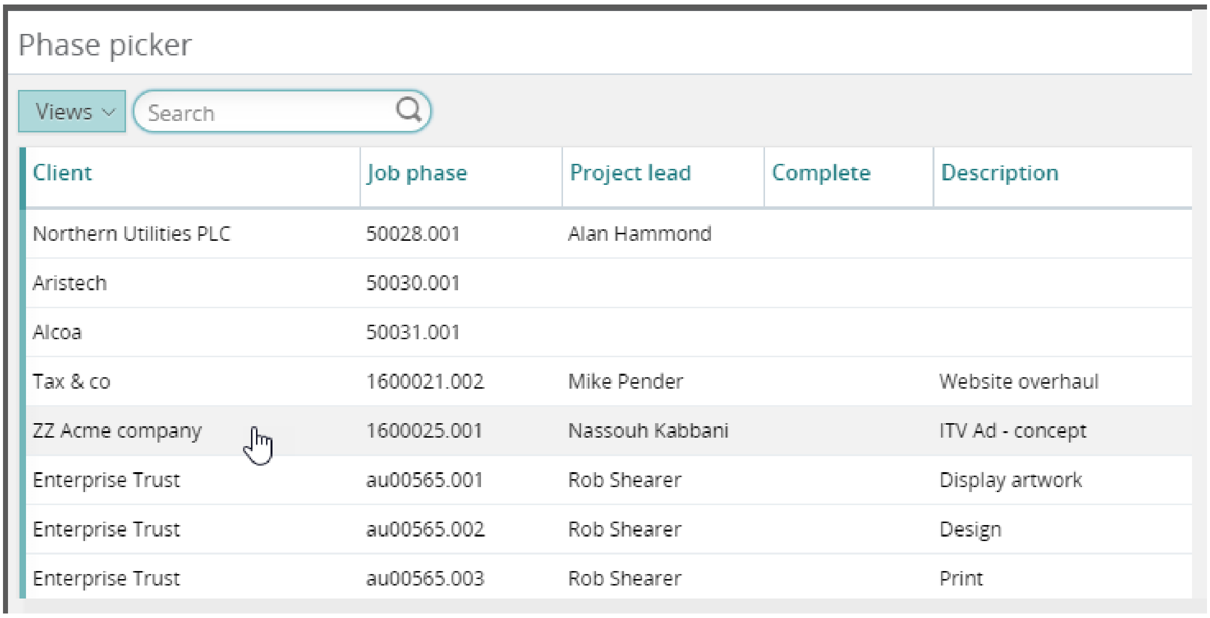
- Navigate to 'Company' settings
- Select the appropriate company
- Click on the 'Advanced' tab
- Locate the box labelled 'Disable option to change dates at a higher level'
- Tick the box to hide the 'Change dates' button on the job details tab or untick the box to display them.



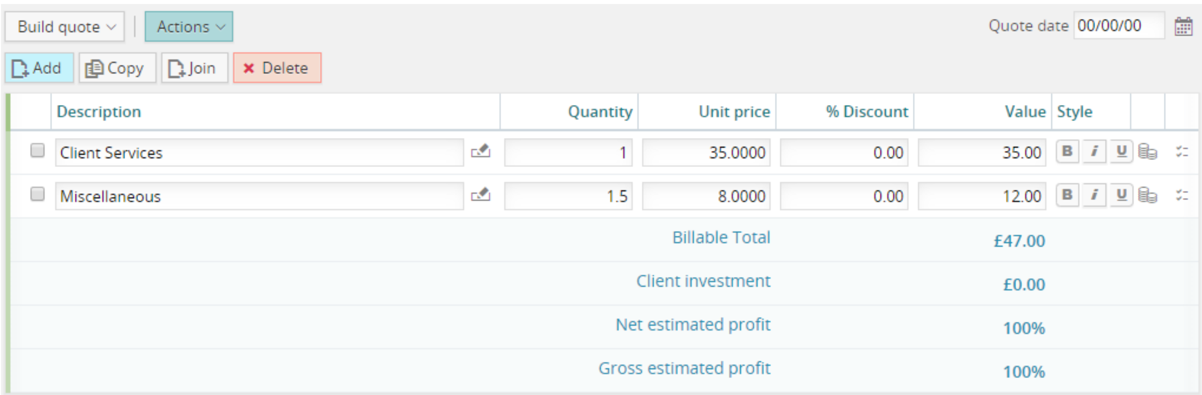
Copying a quote from another job

To save time and utilise existing quotes, it is now possible to copy a quote from another job. To access this feature:

- Select 'Phases' in the main menu
- Open a phase in the 'Phase list'
- Choose the 'Quote' tab
- Click the 'Actions' button
- Select 'Copy from another job'
- Choose a phase from the 'Phase picker' window



The selected phase quotes are copied to the current quote and all the fields are editable.



Copy phase from another job / template

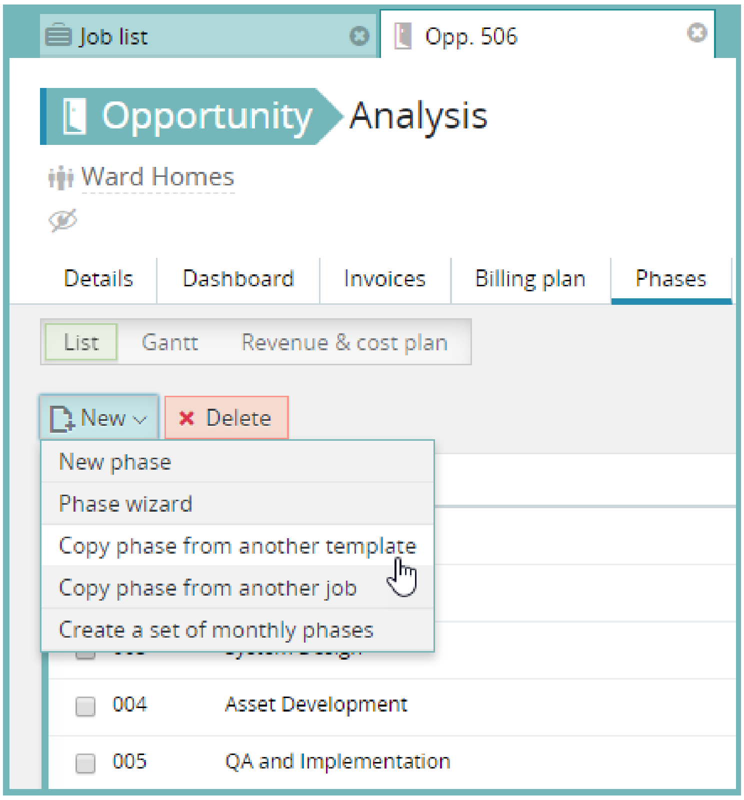
When viewing the 'Phases' tab of a 'Job' or 'Opportunity', there are two new functions which copy phases and add them to the phase list:

- Copy phase from another template
- Copy phase from another job

To access these new features:

- Select 'Job' or 'Opportunity' from the main menu
- Open a job or opportunity from the list
- Click the 'Phases' tab
- Press the 'New' button
- Choose 'Copy phase from another template' or 'Copy phase from another job'.

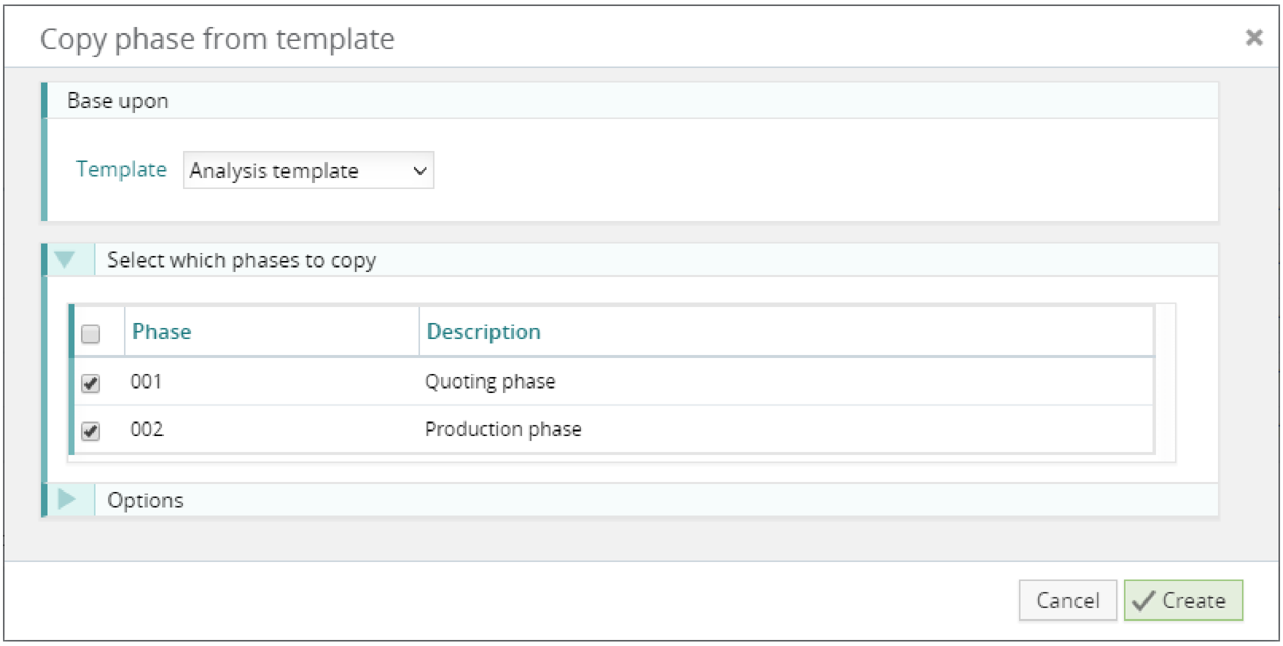
Copy phase from another template:



(JOBS CONTINUED …)

Selecting 'Copy phase from another template' opens a pop-up window with 3 main panels:

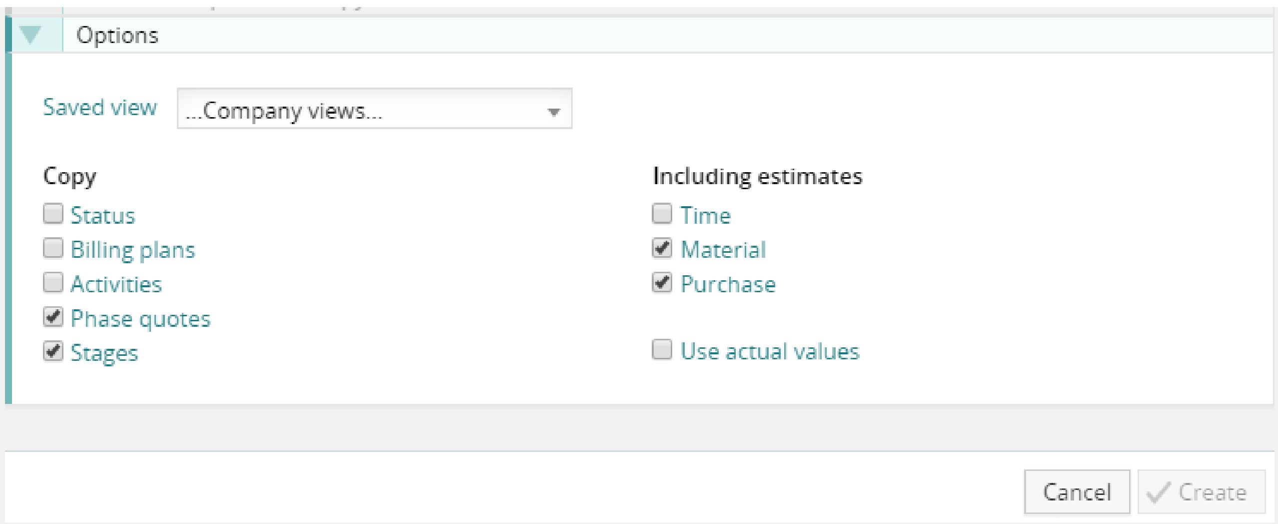
- Base upon
- Select which phases to copy
- Options



Base upon:
The default setting for the 'Base upon' template field is '-Blank-'.
Use the drop-down menu to select a template. Only one template may be selected.

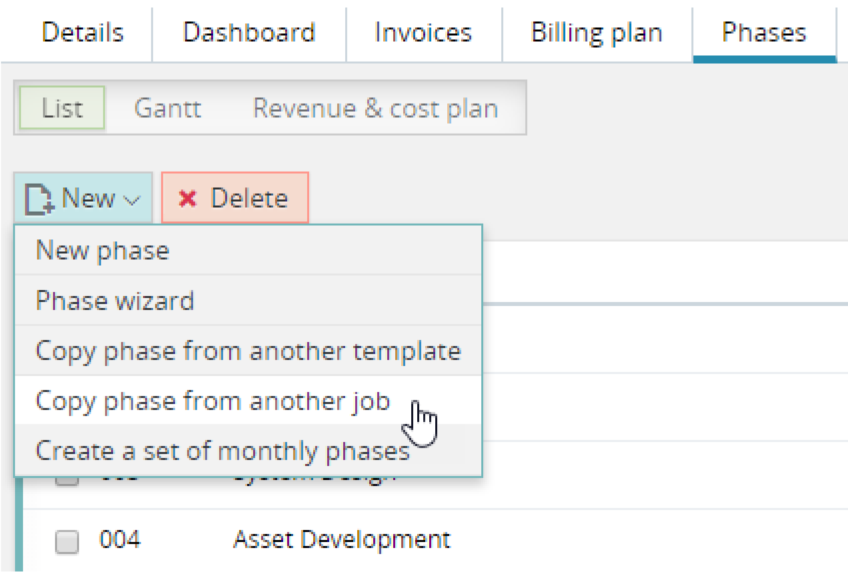
Select which phases to copy:
The list of phases to copy depends on the template job chosen. Select one or more phases by clicking in the appropriate tick boxes.

Options:
Similar to when creating a job, the 'Options' panel gives an opportunity to choose which elements of the selected phase(s) need to be copied.

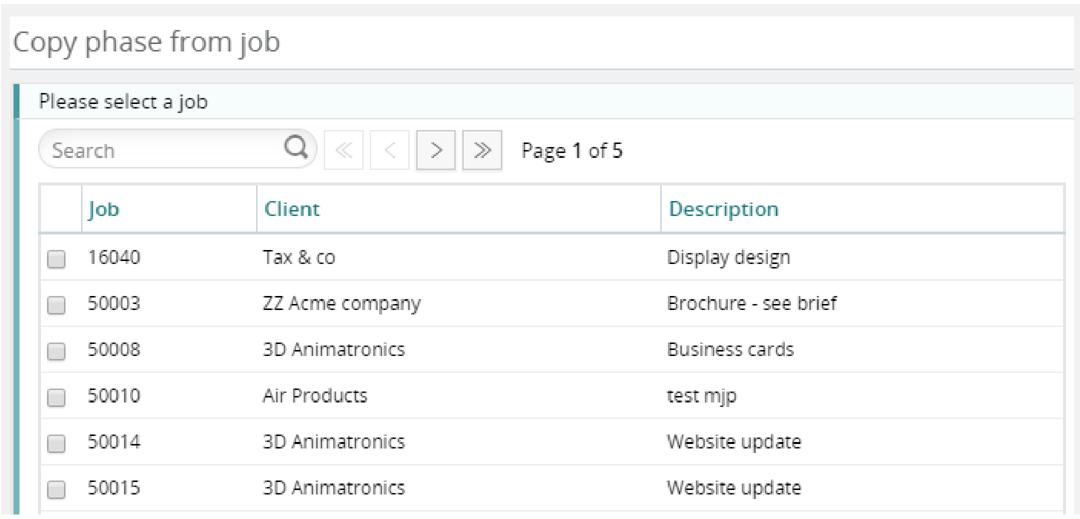


Click 'Create' for the newly copied phase(s) to be added to the list of phases. The new phase description(s) are the same as those of the copied phase(s).

Copy phase from another Job

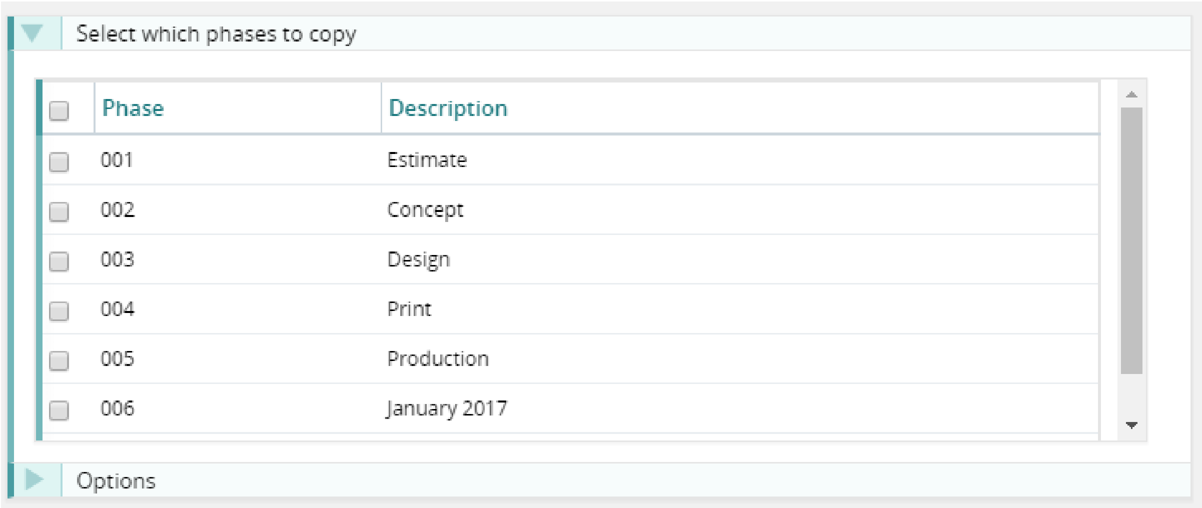


Selecting 'Copy phase from another job' opens a pop-up window. From the list of jobs on the left-hand side of the window, only one job may be selected.

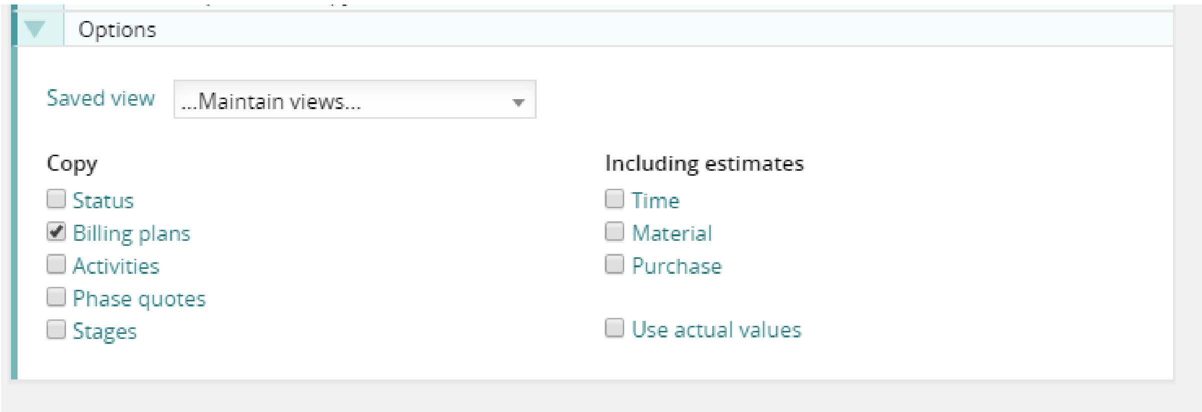


(JOBS CONTINUED …)

On the right-hand side of the window, in the 'Select which phases to copy' panel, select one or more phases for copying. Depending on the job selected, different phases appear in the list.



The 'Options' panel is the same as when copying a phase from another template, giving an opportunity to choose which elements of the selected phase(s) to copy.



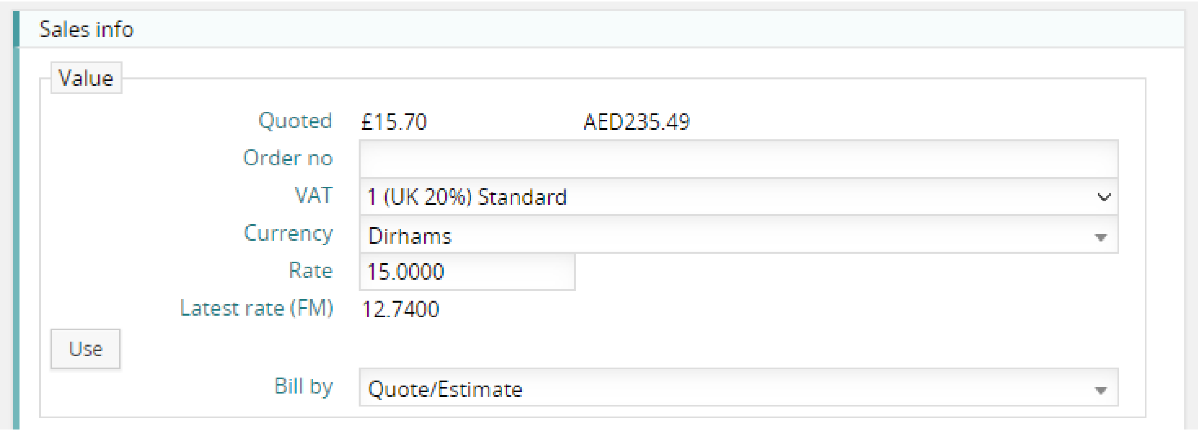
Click 'Create' for the newly copied phase(s) to be added to the list of phases. The new phase description(s) are the same as those of the copied phase(s).

Changing job currency and exchange rate

Enhancements have been made to the existing feature, enabling changes to be made to the currency rate without having to re-select the currency.

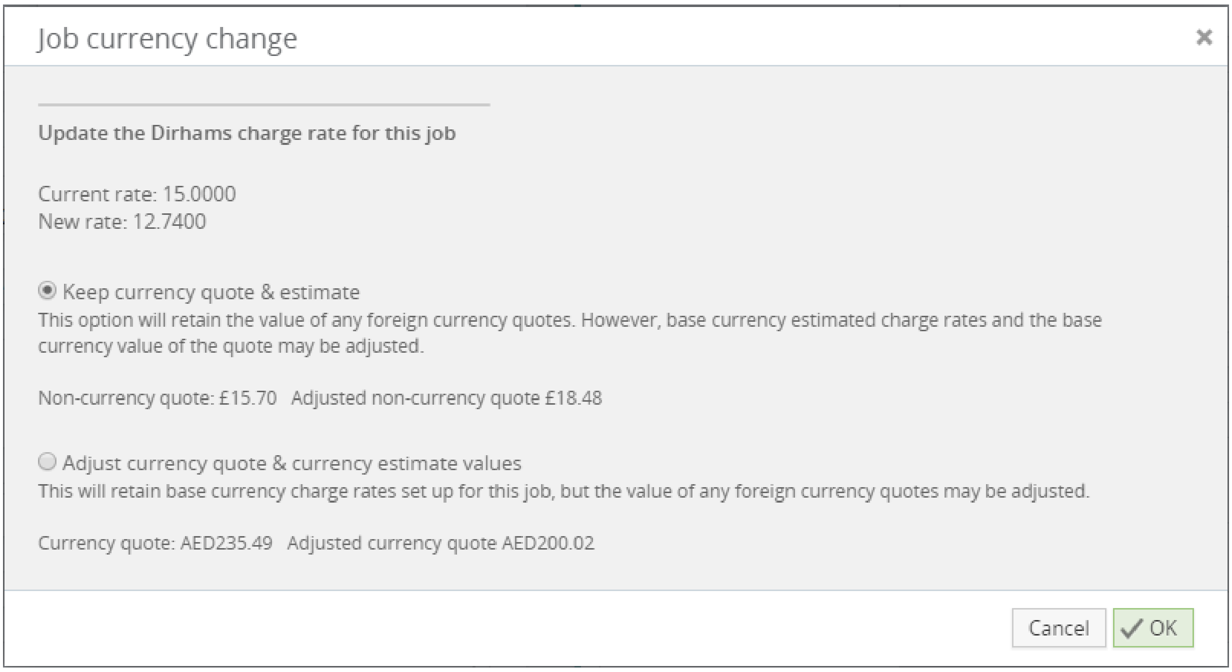
To access this feature:

- Select 'Jobs' in the main menu
- Open a job
- Click the 'Details' tab
- Scroll down to the 'Sales info' panel



The 'Latest rate (FM)' only displays if there has been a change in exchange rates. To use the 'Latest rate (FM)', click on the adjacent 'Use' button and the 'Job currency change' window opens.

The 'Job currency change' window also opens when changes are made to the 'Currency' field or 'Rate' field.



There are two options in the 'Job currency change' window:

- **Keep currency quote & estimate**
  This option retains the value of any foreign currency quotes, adjusting the base currency estimated charge rates and the base currency value of the quote

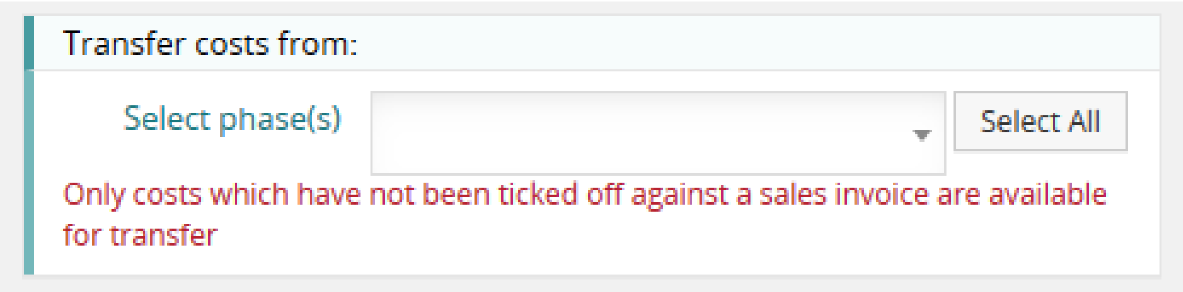
- **Adjust currency quote & currency estimate values**
  This option retains base currency charge rates set up for the job, but the value of any foreign currency quotes may be adjusted with the selected rate used in the calculations rather than the 'Latest rate (FM)'

Clicking 'Cancel' in the 'Job currency change window' – the 'Rate' or 'Currency' are restored to their original values.

Clicking 'OK' in the 'Job currency change window' - the 'Rate' or 'Currency' changes are updated and used for processing.

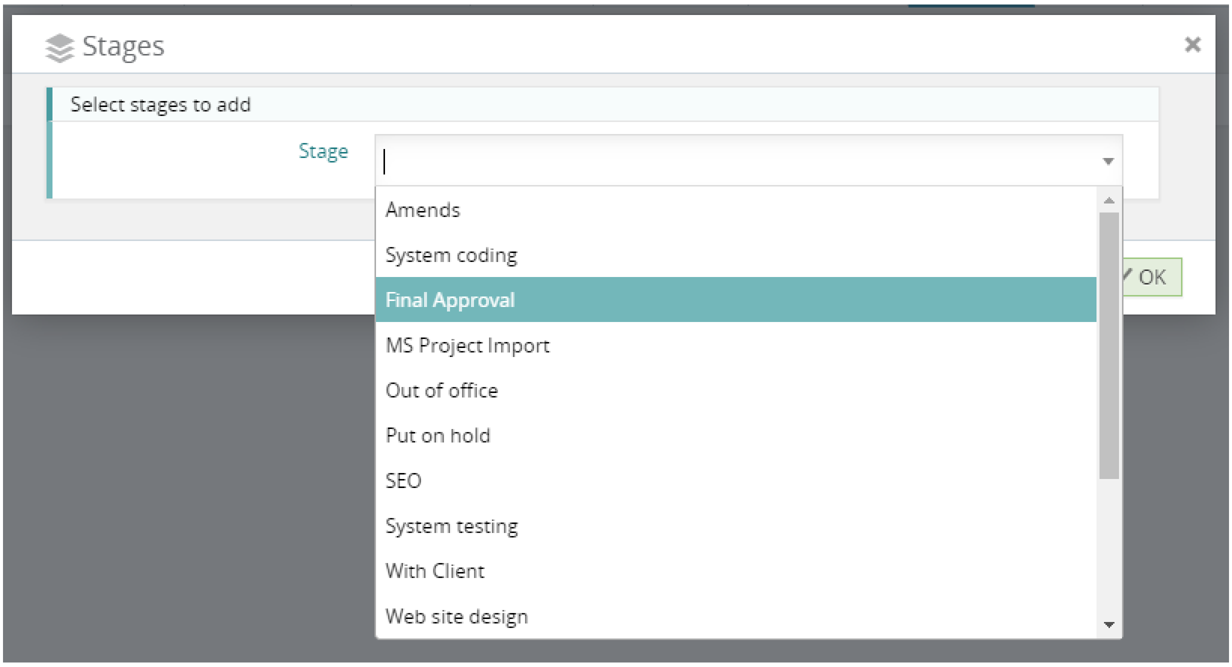
Allocated costs - Warning text

When transferring costs, a warning/info message has been added.

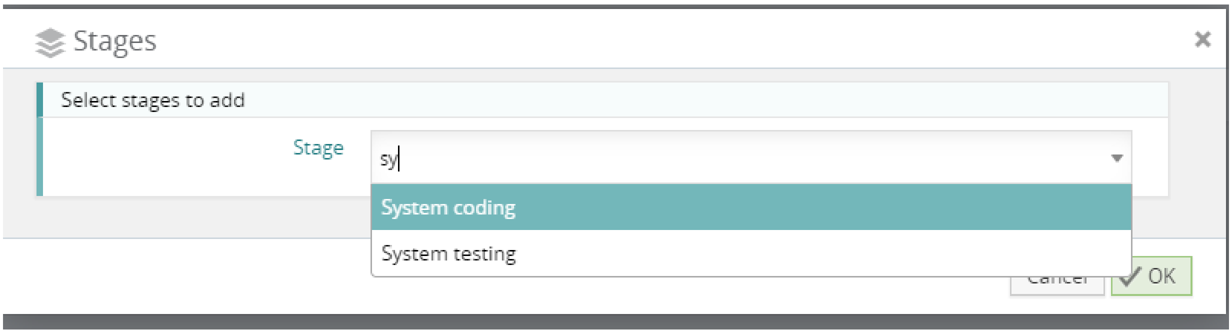


Adding stages – Search filter

Stages can be added via the 'Schedule tab' in Jobs, Opportunities and Phases. Clicking the 'New' or 'Add stage' buttons opens a pop-up window. Click the 'Stage' field to view the complete list of stages.



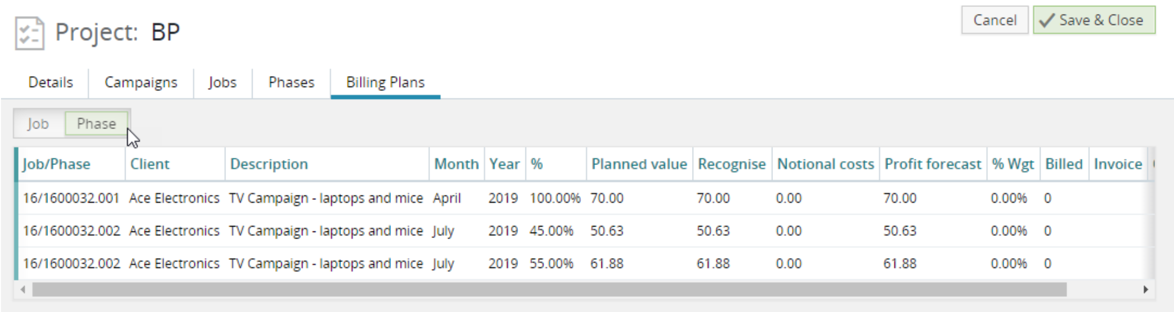
To filter the list, type in some key characters in the stage selection field.



Projects – Display billing plans

The project input form now provides a view of all billing plans on a project.

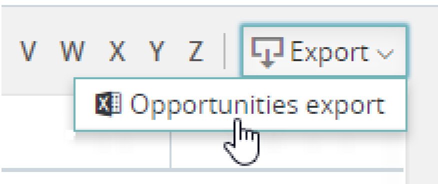
Note: The new multi-job billing plan feature also enables the user to see billing plans sorted by project.



Opportunities export- Job comments added

Job comments are included in an exported opportunities spreadsheet. To view:

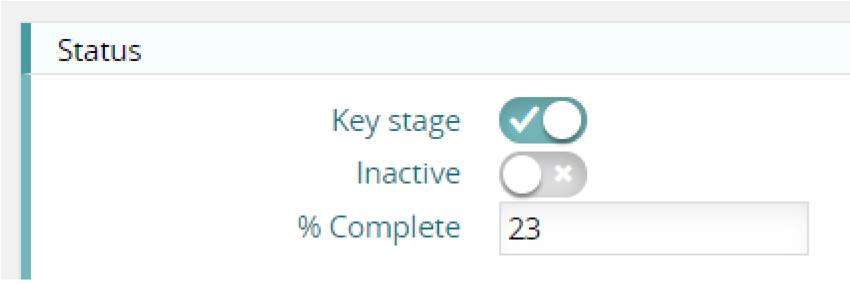
- Select 'Opportunities' in the main menu
- Highlight the tick box for the required opportunity
- Click the 'Export' button in the top right-hand corner of the screen
- Choose 'Opportunities export'



- Open the newly generated spreadsheet and locate the 'Comments' column

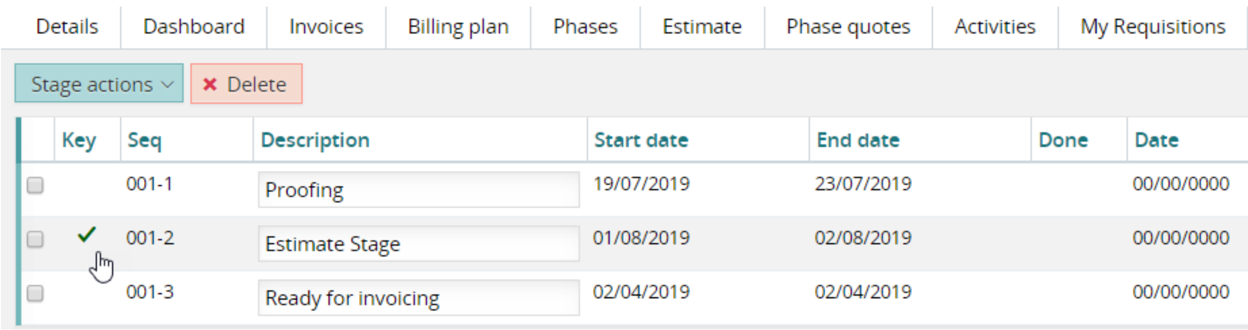
Move stage dates

A key stage is set by opening a stage and moving the key stage toggle.



Identifying the key stage in a schedule

The key stage is identifiable by a tick in the 'Key' column.

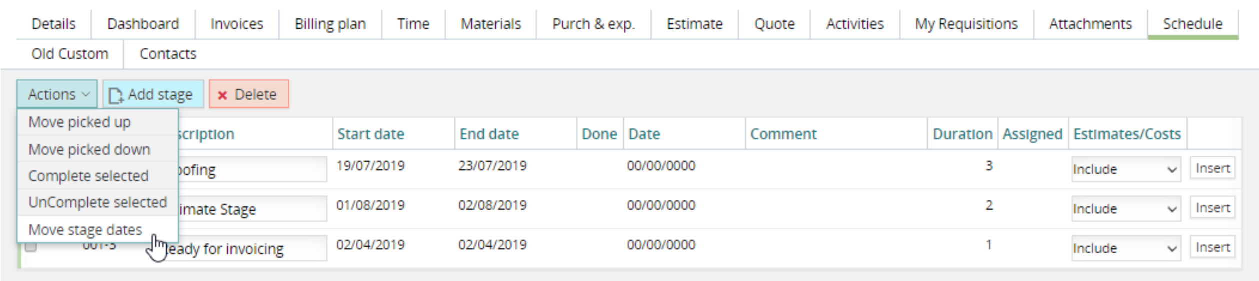


Using the key stage

A 'Key stage' acts like a marker amongst a list of stages and is helpful when having to reschedule stages on a job. Other stages in the list are linked to the key stage and if the date of the key stage changes, other stage dates change, too. There can only be one key stage at any time. For example, if a key stage is set to 'Client approval' and for some reason the approval procedure is delayed, the user may want to move all the dates for subsequent stages.

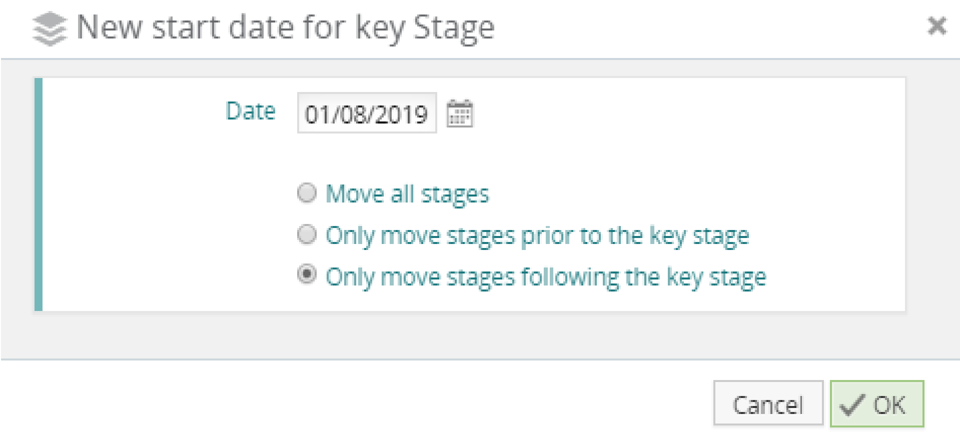
Move stage dates

The 'Move stage dates' feature is located on the 'Actions' menu within the 'Schedule' tab.



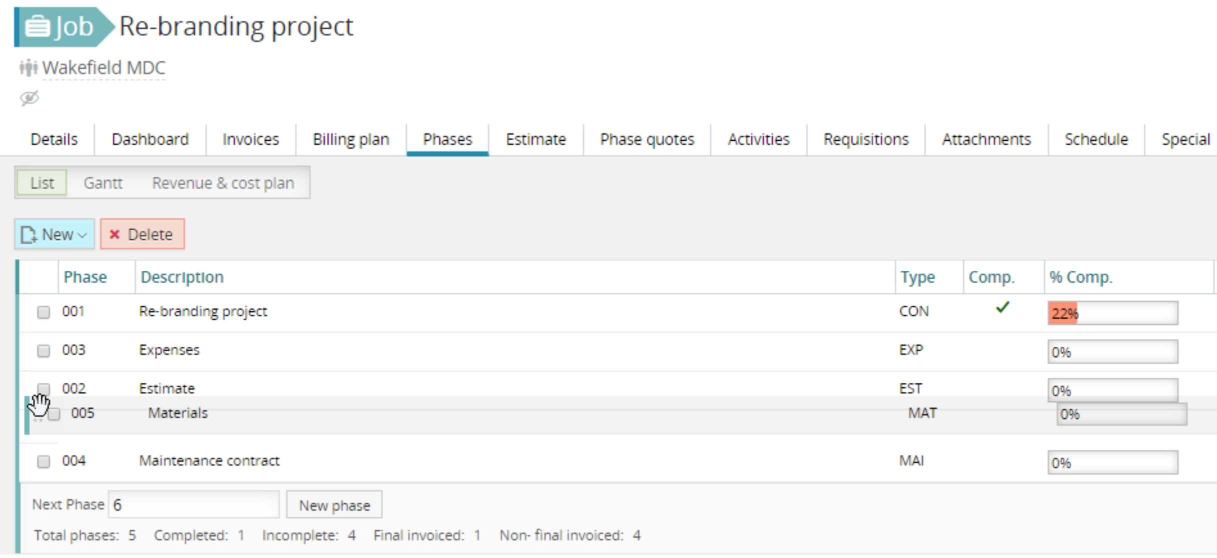
Options when moving dates

A new date for the key stage is entered and which stages to move are selected.



Drag and drop – Ordering of phases

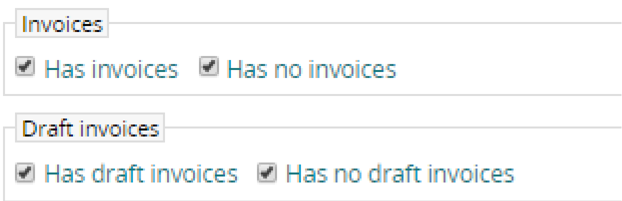
From within the phases tab of a job, it is now possible to drag and drop the phases in the list to re-order them.



Creating a view – Jobs with no associated invoices

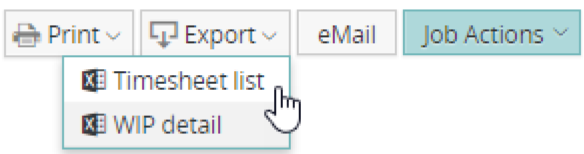
New filters have been added to the Jobs list filter, giving the ability to filter jobs that have/don't have draft or real invoices.

New filter options



Timesheet list export

This feature is available from the job and phase input forms.

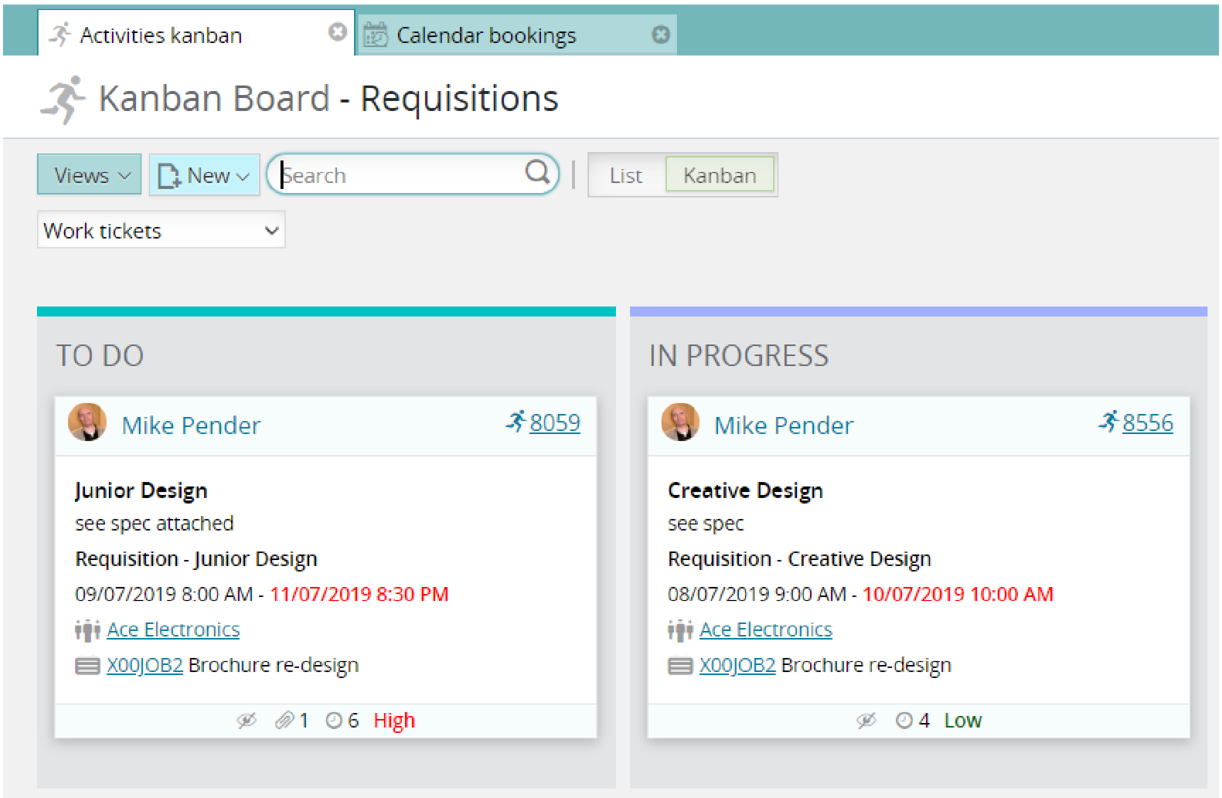


KANBAN BOARDS

Work tickets v Requisitions

A requisition is typically a request by an account handler for some work to be scheduled on one of their jobs. The requisition is then picked up by the traffic manager in the 'Calendar bookings' module.

In this release, requisitions can be used as work tickets. The tickets appear on Kanban boards and can either be pre-allocated to staff resources or left unallocated, with staff encouraged to self-assign the tickets. Optionally, the tickets can appear in Calendars (using the owner's name) and timesheets can be created within the work ticket itself. To support this way of working, the Kanban board now shows the charge code description of any work requested using the requisition.



Layout and features of Kanban cards

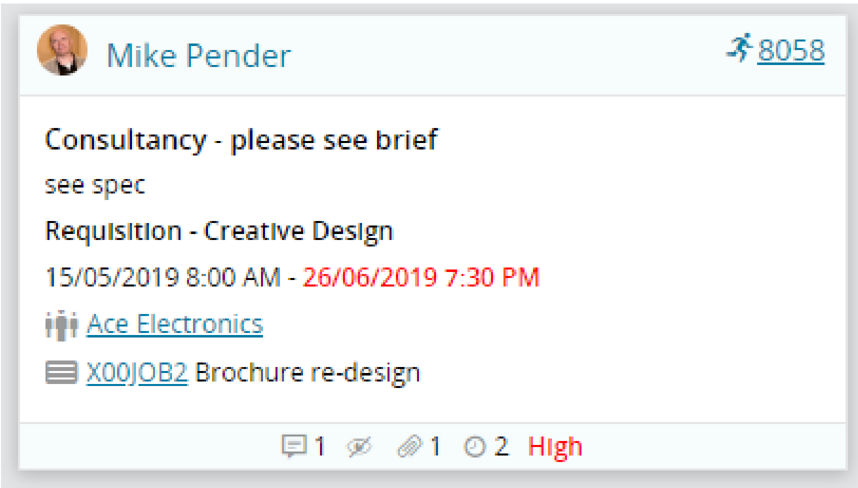
Improvements to Kanban cards include:

- Being more compact
- Displaying charge codes for requisitions
- Status section in the footer area

The status section in the footer area includes:

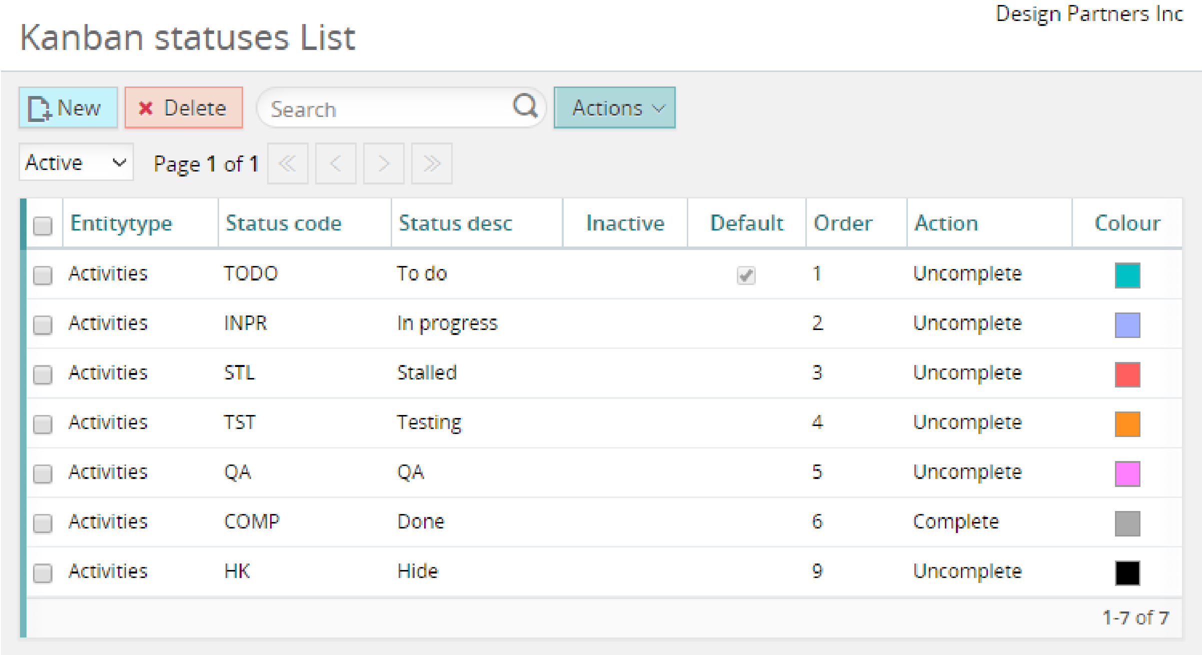
- The number of checklist items complete
- The number of comments
- Whether the user is a watcher
- The number of attachments
- The number of hours requested
- Priority - hidden if priority is 'medium'

New card layout



Colours for Kanban statuses

Kanban status colours can be set up in File Maintenance > Kanban statuses List


Kanban statuses List

Design Partners Inc

New | Delete | Search | Actions

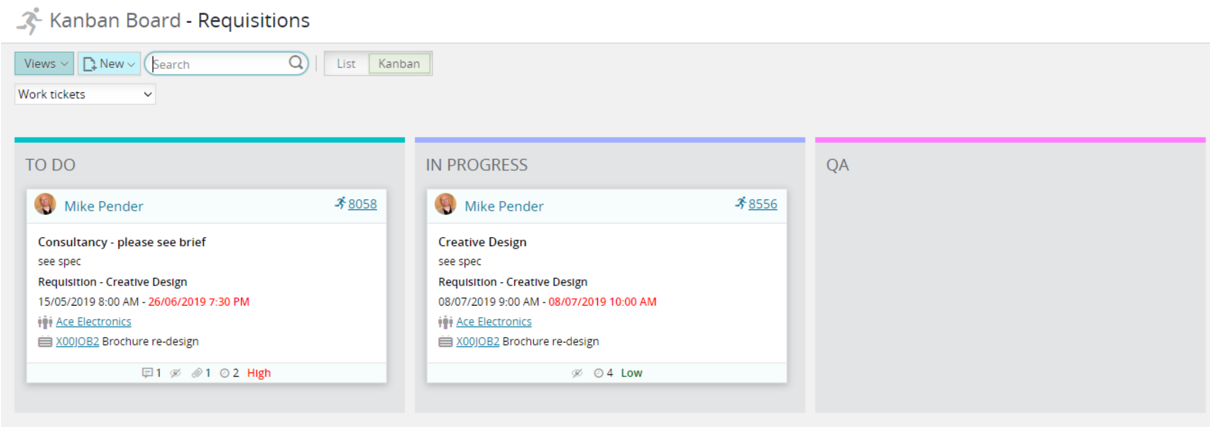
Active | Page 1 of 1

Entitytype	Status code	Status desc	Inactive	Default	Order	Action	Colour
Activities	TODO	To do		✓	1	Uncomplete	
Activities	INPR	In progress			2	Uncomplete	
Activities	STL	Stalled			3	Uncomplete	
Activities	TST	Testing			4	Uncomplete	
Activities	QA	QA			5	Uncomplete	
Activities	COMP	Done			6	Complete	
Activities	HK	Hide			9	Uncomplete	

1-7 of 7

Kanban board

The selected colours underline the column headings on Kanban boards.



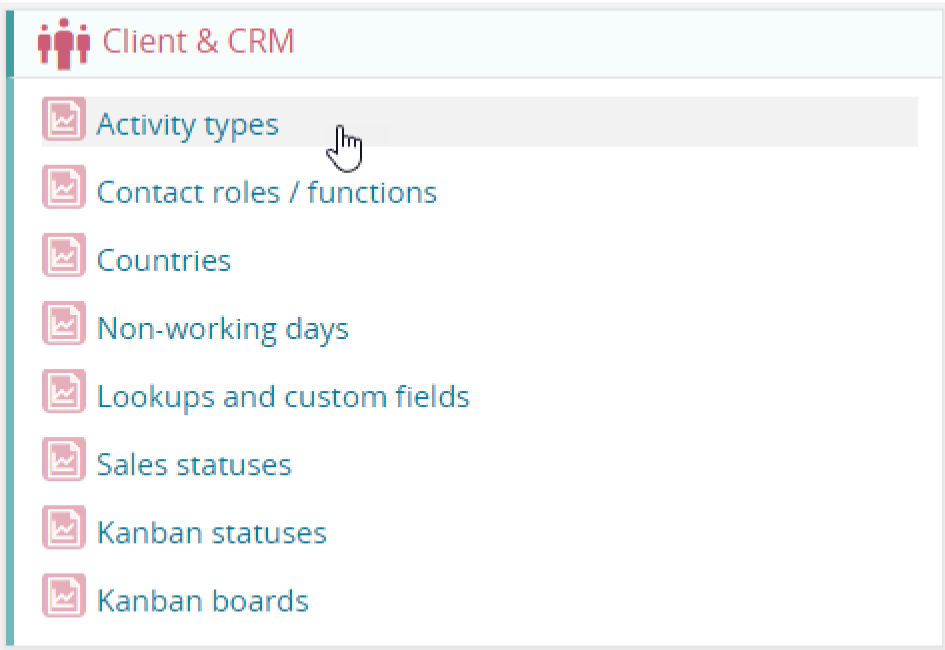
Restrict the use of Kanban to certain activity types

The 'Activities list' can be viewed in either 'List' or 'Kanban' mode. Items viewable in 'List' mode may be hidden in 'Kanban' viewing mode.

Managing Kanban view settings

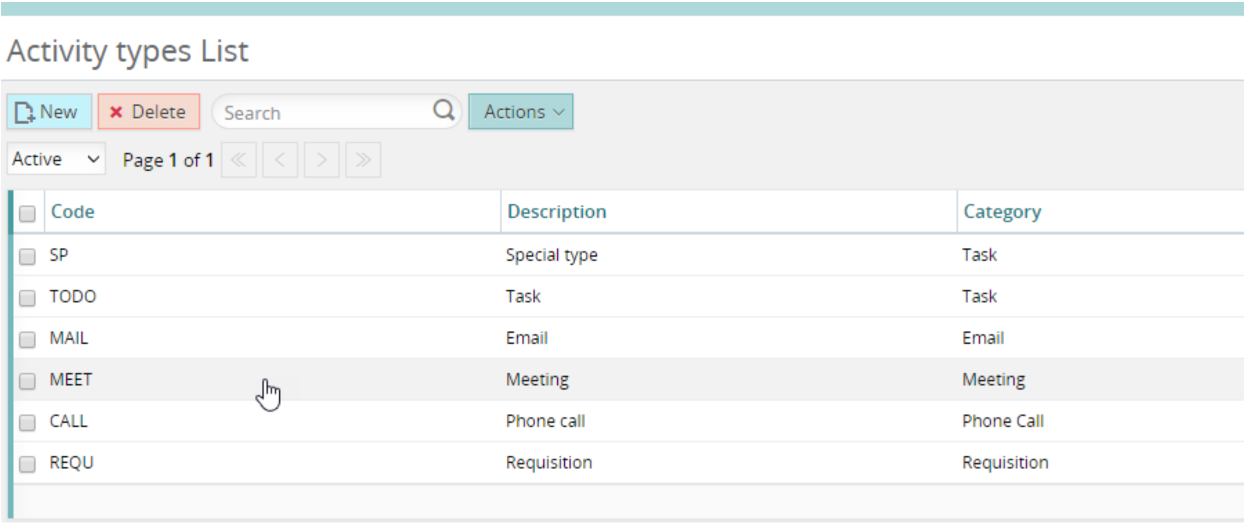
By default, all activity types are viewable on Kanban boards. In some circumstances there may be activity types, such as phone calls, that users may not wish to view. To restrict or allow the viewing status of activity types on Kanban boards:

- Navigate to 'Settings'
- Select 'File Maintenance'
- Locate the 'Client & CRM' panel
- Click 'Activity types'

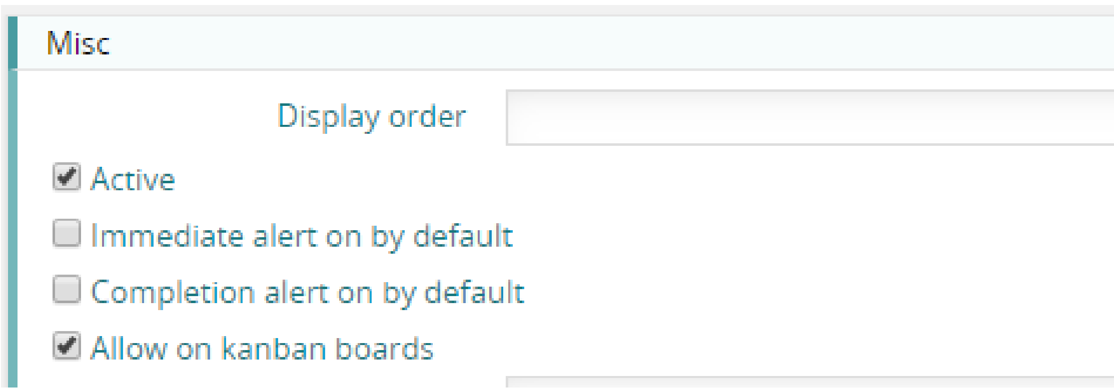


(KANBAN CONTINUED …)

In the 'Activity types List', locate and select the activity for hiding / displaying in Kanban view.



Select the 'Allow on kanban boards' tick box to display the activity on Kanban boards. Deselect to hide the activity on Kanban boards.



PURCHASING

Consolidated purchase orders

The 'Consolidate Purchase Orders' function enables two or more estimates with the same supplier to be combined.

Please note:

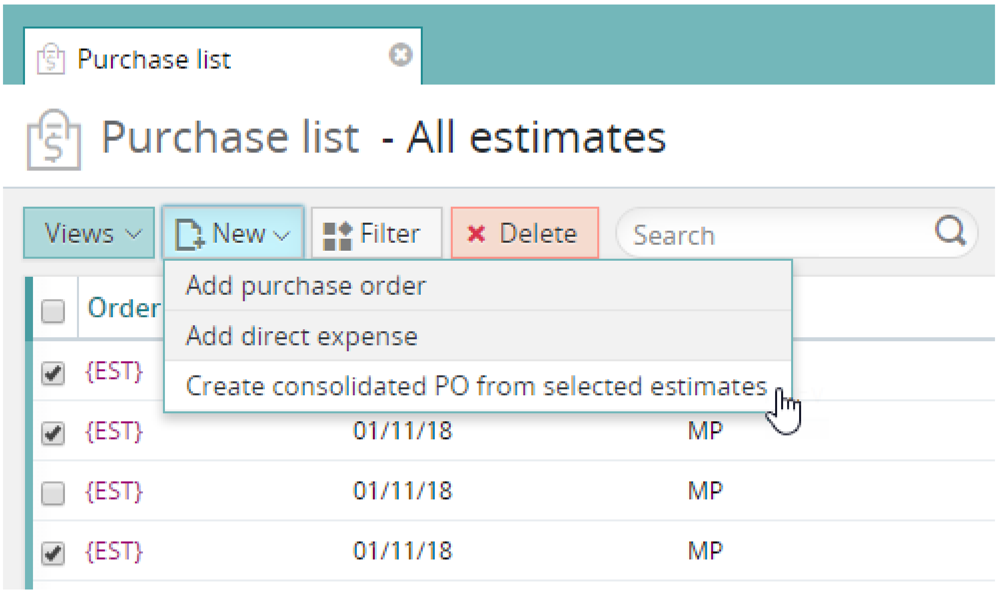
- All estimates which are used to create a consolidated PO are converted into POs and share the same PO number as the consolidated PO
- Newly created POs cannot be returned to their original estimate state
- POs and consolidated POs cannot be deleted

To create an estimate:

- Select 'Phases' in the main menu
- Open a phase in the 'Phase list'
- Click the 'Estimate' tab
- Ensure that the 'Full estimate' button is highlighted
- Select the 'New' button and choose 'Add a purchase'
- Follow the steps to assign a supplier
- Complete any required fields in the Purchase Estimate > 'Details' tab
- Click 'Save & Close'

To create a consolidated purchase order:

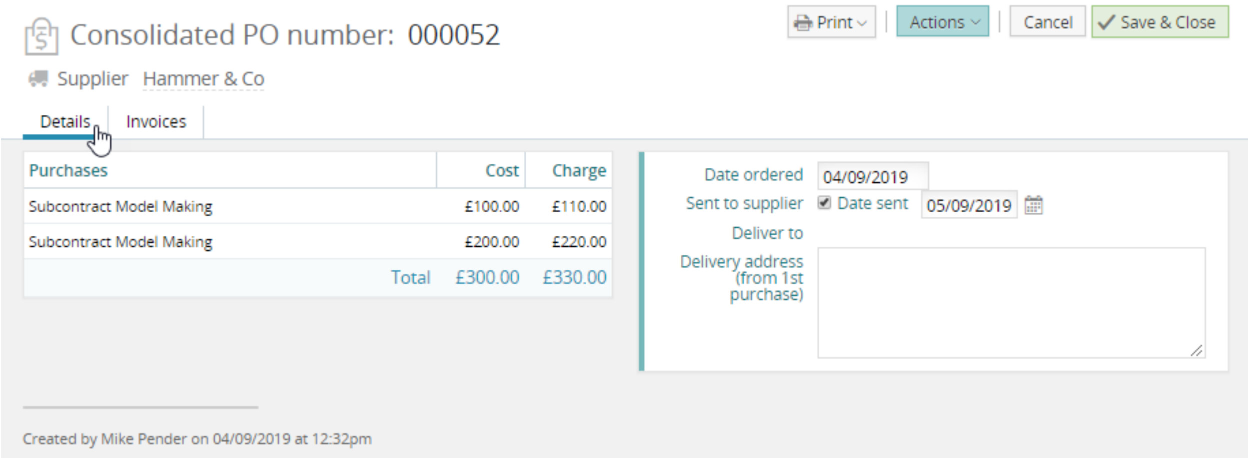
- Select 'Purchase orders' in the main menu
- The 'Purchase list' contains all POs and estimates. Estimates in the list are identifiable by the abbreviation {EST}
- To only view estimates, click the 'Views' button and choose 'All estimates'
- Select two or more estimates with the same supplier
- Click the 'New' button and choose 'Create consolidated PO from selected estimates'



The 'New Record: Purchases' screen opens automatically with the consolidated PO number displayed at the top of the page. The supplier's name is also displayed, acting as a hyperlink to the supplier's 'Details' screen.

The Consolidated purchase order screen contains two tabs:

- Details
- Invoices



The 'Details' tab:

- Individual purchase orders consolidated into a single PO are displayed on the left
- View other information including 'Date ordered', 'Date sent' and delivery details in the right-hand panel

The 'Invoices' tab:

- The Invoices tab lists purchase invoices that have been allocated to any of the purchase orders in the consolidated purchase order
- To create an invoice for the consolidated PO, select 'Purchase invoices' from the main menu

To view an existing consolidated PO:

All estimates which are used to create a consolidated PO are converted into POs and share the same PO number as the consolidated PO. To view an existing consolidated PO:

- Navigate to the 'Purchase list'
- Click the 'Views' button
- Select 'All purchase orders'
- Locate one of the POs used to create the consolidated PO
- Open the PO and click on the uniquely numbered 'Consolidated PO' button towards the top right of the screen.

Cancelled purchase orders

There is improved support for cancelled purchase orders with regards to the 'actual recommended charge' total. These improvements include:

- Cancelling a PO now sets the PO charge out value to '0' and the markup/discount % to '-100%'
- Auto tick-off for sales invoices, flagging cancelled POs as written off rather than billed
- Cancelled POs being excluded from the job and phase estimate page. Estimate revisions also suppress showing cancelled POs if they were already cancelled when the revision was created

Hovers added to 'Purchasing' and 'Expenses' sections

Throughout the program, in all the main lists, pop-up text and windows containing helpful information appear when the cursor hovers over text. Hovers have been added in the following sections:

'Suppliers & Purchases' section:

- Supplier contact list
- Purchase orders list
- Purchase invoice list

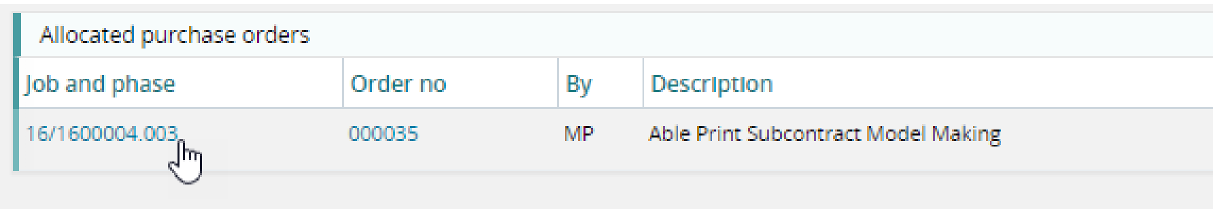
'Time & Expenses' section:

- Timesheet approval list
- Expense list

Purchase invoice – Opening associated purchase orders

This feature opens a purchase order from the allocated/unallocated purchase orders list from within a purchase invoice.

Purchase invoice screen



New pop-up screen when creating a purchase invoice

After details of a purchase order have been entered and approved, the user may wish to create a purchase invoice for the order.

To access the 'New purchase invoice' window:

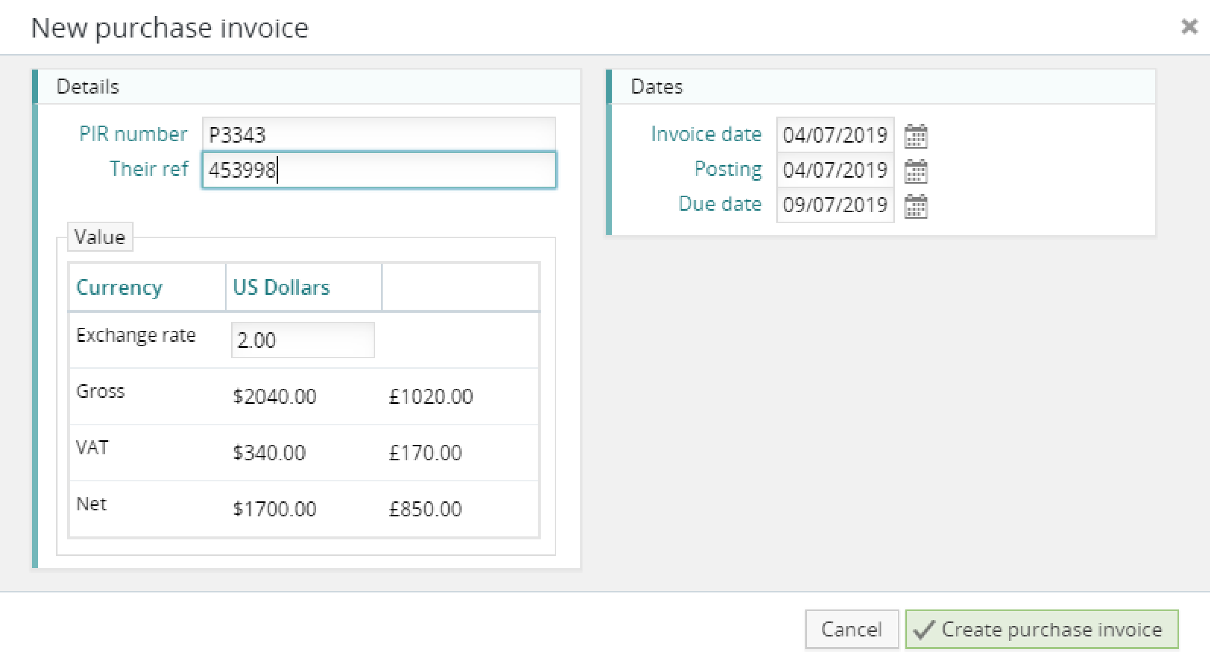
- Select 'Purchase orders' in the main menu
- Open an approved purchase order in the 'Purchase list'
- Choose the 'Invoices' tab
- Click the 'Add purchase invoice' link which is only visible if the purchase order is approved

Clicking on the 'Add purchase invoice' link opens a new pop-up window 'New purchase invoice'. The window contains three main sections:

- **Details**
  For inputting the 'PIR number' and 'Their ref'

- **Value**
  For viewing the Gross, VAT and NET figures of the invoice

- **Dates**
  For making changes to the Invoice date, Posting date and Due date



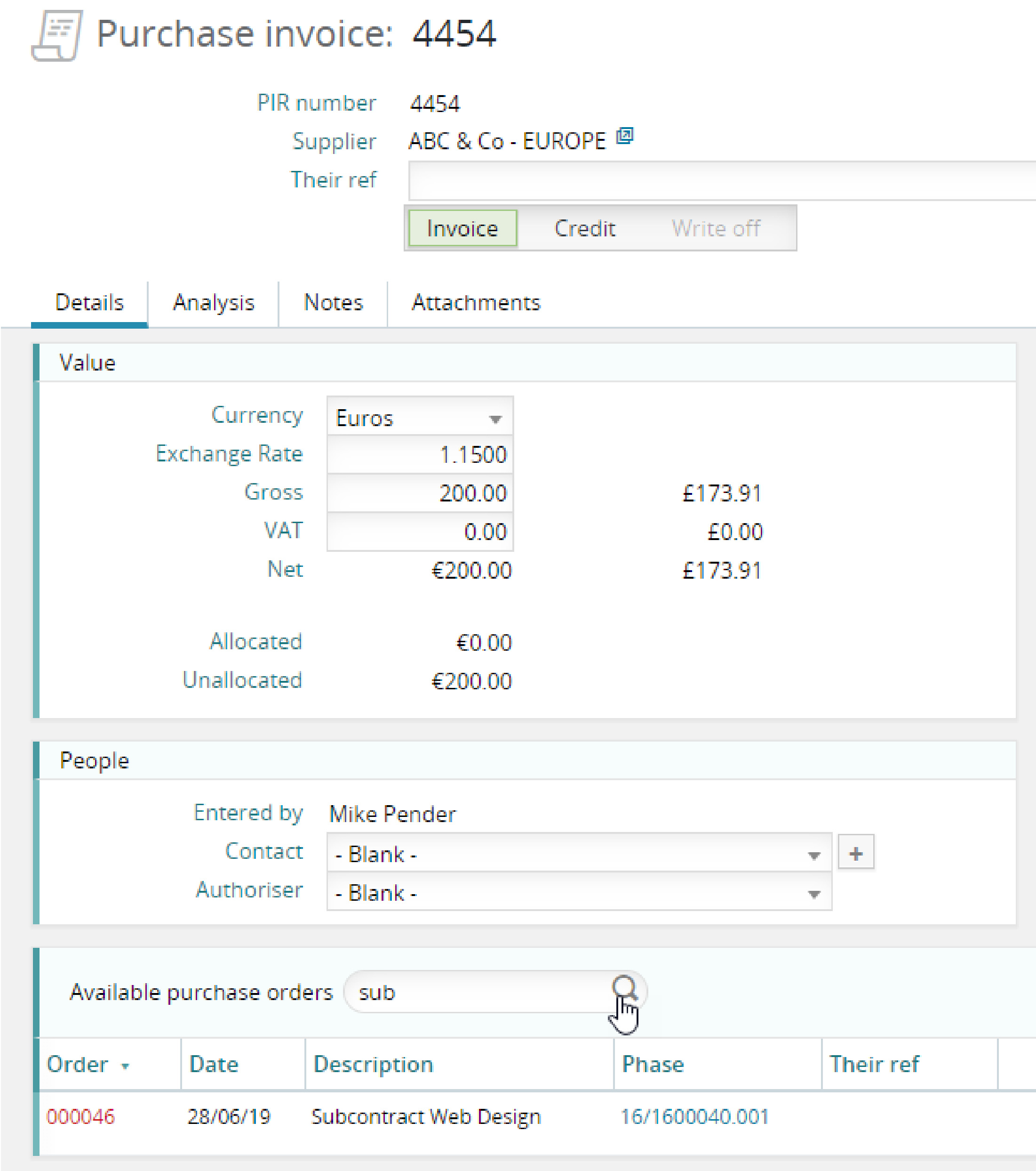
If the purchase supplier is 'Multi-currency', the purchase currency and domestic currency are both displayed. The 'Exchange rate' can be adjusted manually and the Gross, VAT and NET figures adjust accordingly.

Search purchase orders within a purchase invoice

Option to search for purchase orders when allocating purchase orders to a purchase invoice.

To use this function:

- Navigate to 'Purchase invoices' in the main menu
- Open an invoice in the 'Purchase invoice list'
- Click the 'Details' tab
- Locate the 'Available purchase orders' panel
- Use the search window function or scroll through the list of 'Available purchase orders'

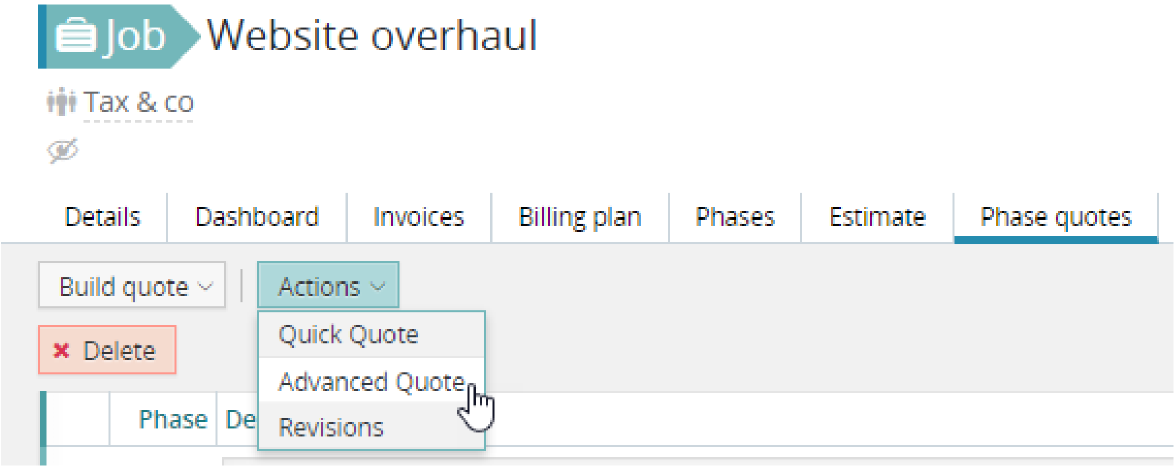


Roll-up in bold option

Option to 'Roll up details' when building a quote and have the phase description displayed in bold and italics.

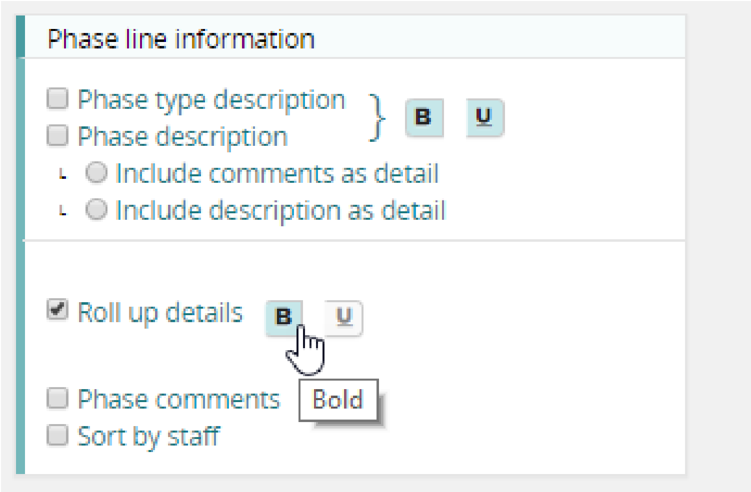
This feature is available in the Jobs, Phases and Opportunities areas of the program.
To access the feature via the Jobs area:

- Navigate to 'Jobs' in the main menu
- Open a job in the 'Jobs list'
- Click the 'Phase quotes' tab
- Press the 'Actions' button
- Select 'Advanced Quote' from the drop-down list
- Locate the 'Phase line information' panel

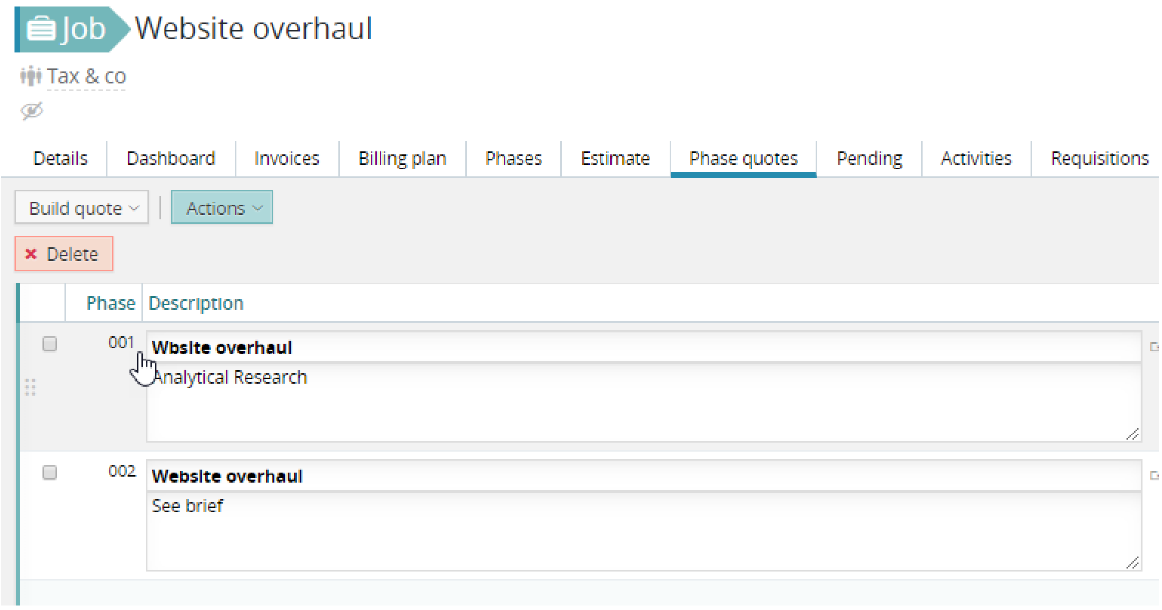


(QUOTING CONTINUED ...)

Bold and underline are now supported



Example quote



REPORTING

Custom and saved reports

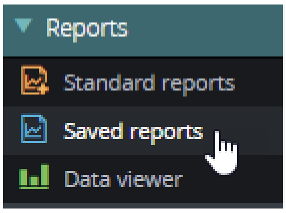
'Saved reports' has been renamed to 'Custom and saved reports'. Enhancements include Support of 'Custom reports' and filters.

Background

Custom reports are typically created by Synergist Support for Project Managers as a bespoke service. Custom reports can either be HM reports (PDF format) or manual reports (simple plain reports).

Synergist Support and/or Project Managers design reports according to requirements and provide default filters based on the data typically needed to locate them. The reports can be further filtered by users and saved as reports with new names. Super users can save such views as 'Company views' for all users to access. Other users can simply save as a person view for their own use. These report views appear under 'Saved reports'.

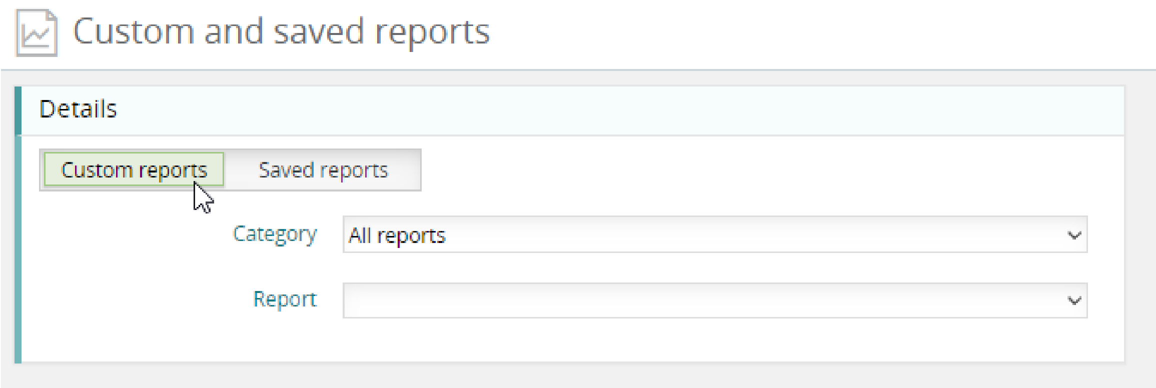
Access to 'Custom and saved reports' is via the 'Saved reports' link in the main menu.



User interface

Clicking 'Saved reports' opens a new screen displaying two main options:

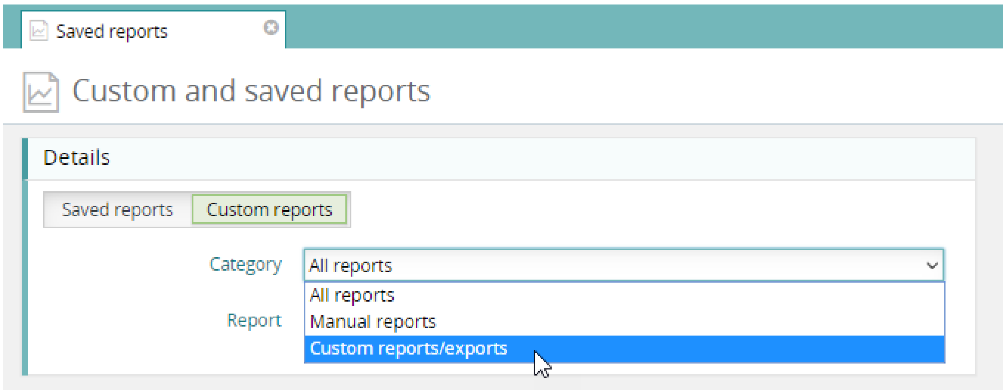
- Custom reports
- Saved reports



Custom reports

Select 'Custom reports' to see a list of any reports set up by Synergist Support or the Synergist Project Manager. Two different categories of reports are available:

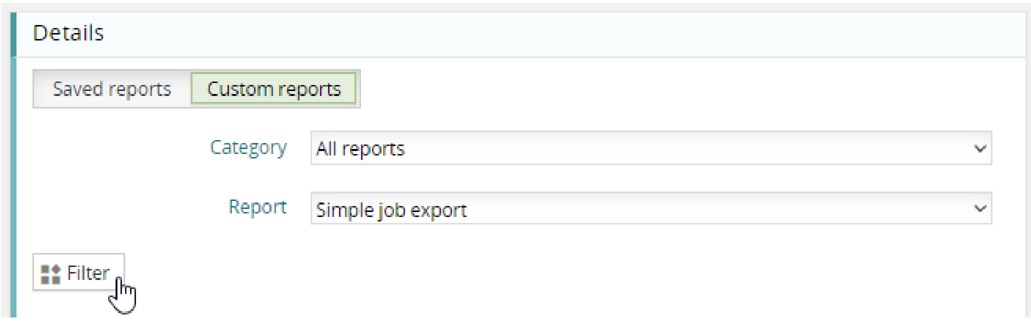
- Manual reports
- Custom reports/exports



If a custom report is installed on the user's system, the report can be run using its default settings. However, users may want to create and save new reports. To do this, click on the 'Filter' button, make any necessary changes and save the report with a new name (see below). On subsequent visits, the report is located in the 'Saved reports' section.

Filter button

On selecting a report, the user has all the usual options to run the report. However, there is also a 'Filter' button with advanced filtering features.



Please see below for examples of 'Filter' button use.

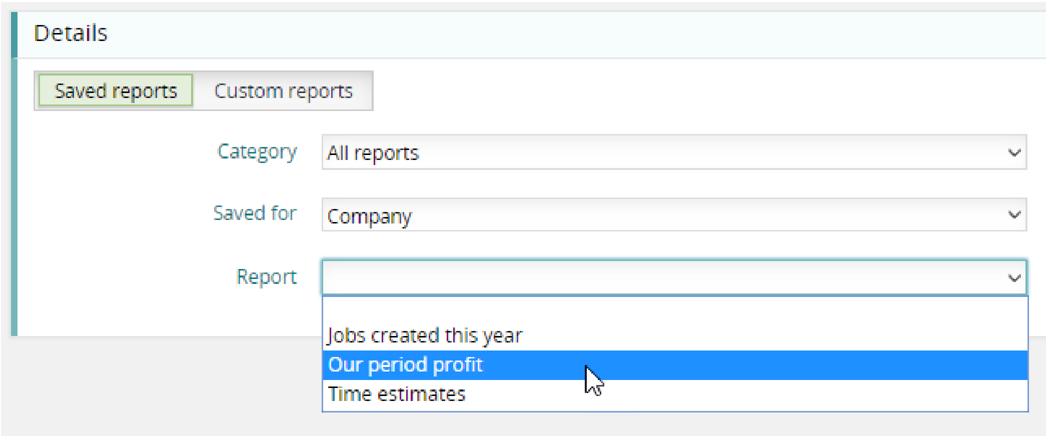
Saved reports

Saved reports are really **views** of existing standard reports and custom reports. Users can select a report, modify the default filter and save the view as a 'Saved report'. Saved reports appear under the 'Saved reports' heading.

'Saved reports' lists reports set up by the Synergist Project Manager or Synergist Support. Three different categories of reports are available:

- Manual reports
- Custom reports/exports
- Data viewer reports

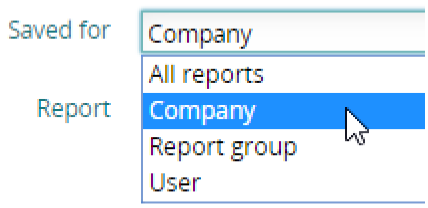
Note: 'Data viewer reports' do not have access to the Filter. All filters for 'Data Viewer reports' are accessed and saved via the data viewer module.



Saved for

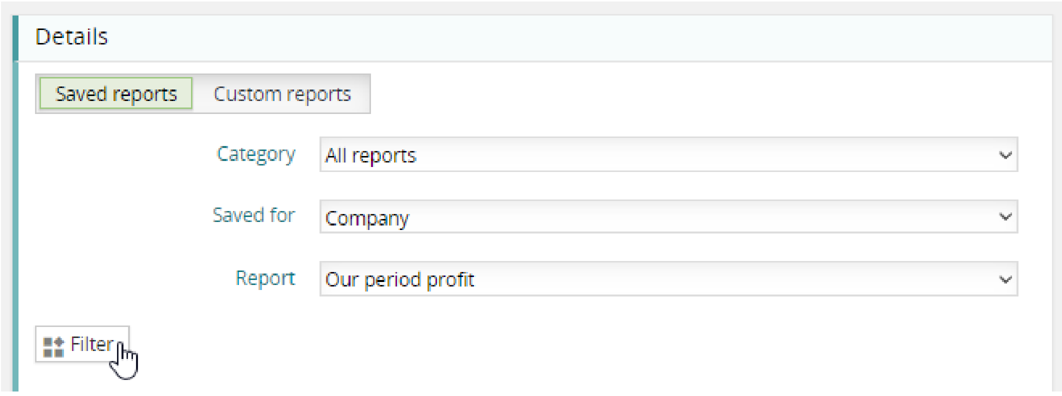
The 'Saved for' drop-down menu enables users to filter the list of available reports with the following options:

- All reports
- Company - Reports set up for the user by their system administrator
- Report group - User groups set up for the user
- User - Reports saved by the user



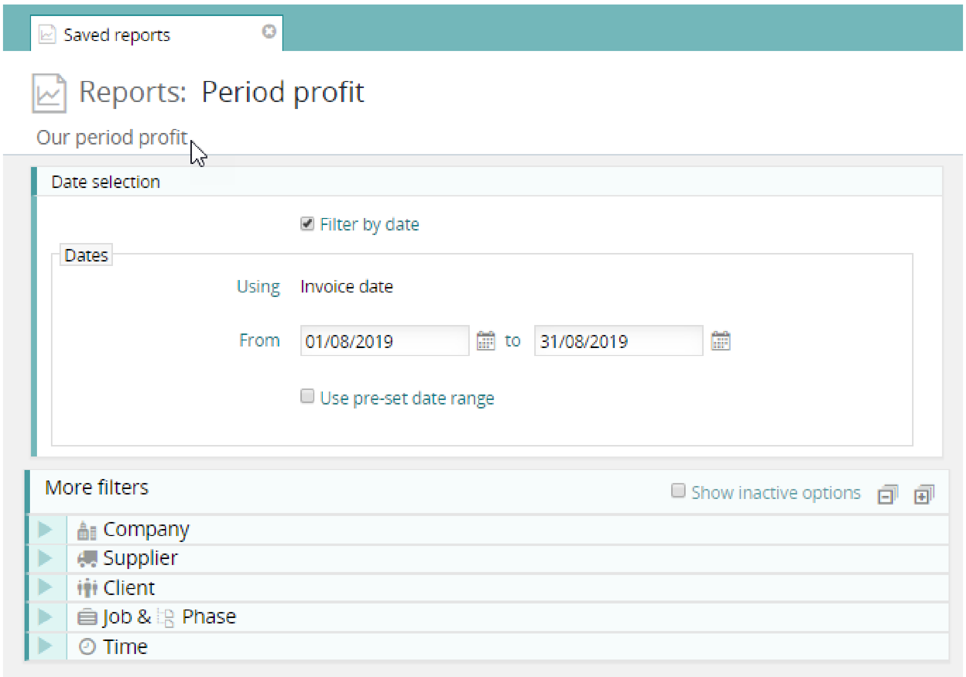
Filter button - refine report

On selecting a report, the user has all the usual options to run the report. However, there is also a filter button, giving access to the advanced filtering features.



Refine report

On accessing the standard 'Refine report' screen, the report name is the name of the original custom report. Under this is the saved report name. This informs the user that they are currently running a saved version of the original custom report. The user may create as many of these variants as required.



Views

From the 'Refine report' screen, the user can run the report, modify the filter and run the report, or save any changes to the filter by clicking the 'Views' button.

In this example, a previously saved version of a report can be loaded, or the current filter saved in the usual way.

WIP Aged

Split WIP by cost type

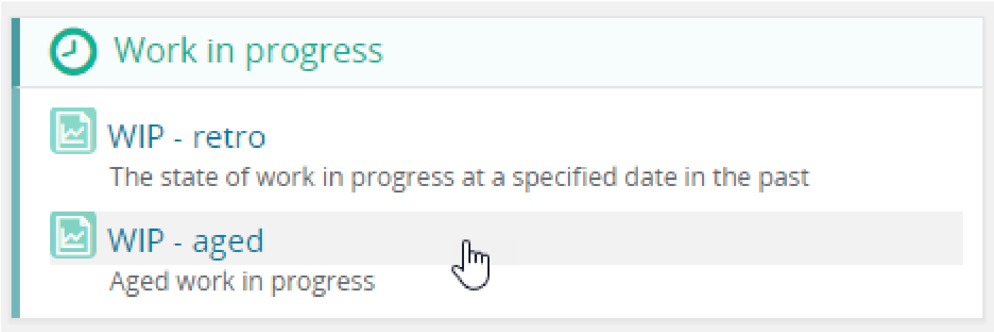
The WIP_Aged CSV file produces a spreadsheet with many column headers including:

- Current
- 30 Days
- 60 Days
- 90+ Days
- Total

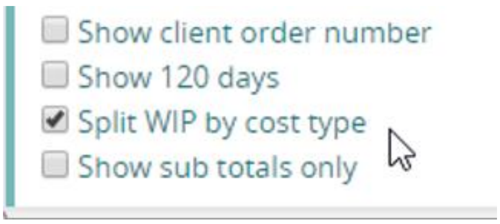
The ‘Split WIP by cost type’ feature creates extra columns in the WIP file that further break down existing columns into purchases, time (cost), time (hours) and materials (cost). In doing so, additional grouped columns are created in the spreadsheet.

To access this feature:

- Select ‘Standard reports’ in the main menu
- Locate the ‘Work in progress’ panel in the bottom right corner of the ‘Reports’ screen
- Click the ‘WIP-aged’ link



The ‘Split WIP by cost type’ feature is the penultimate tick box in the ‘Options’ panel.



Estimate v Actual

This export is now available as a PDF printout.

Example report

synergist Estimate vs actual 23/07/19 12:51:41 1

From 01/02/19
To 31/07/19

Enterprise Trust

Job number	Description		%	Est units	Act units	Est cost	Act cost	Est chg	Act chg
16/au00565	Redesign	1/tesd	0	8.00	0.00	32.00	0.00	64.00	0.00
16/au00565	Redesign	Planning	11	3.00	3.30	0.00	0.00	225.00	247.50
16/au00565	Redesign	Pre Sales	0	7.00	0.00	140.00	0.00	0.00	0.00
16/au00565	Redesign	Rail Engineer 1	0	3.00	0.00	75.00	0.00	300.00	0.00
16/au00565	Redesign	Scanning work	11	4.00	4.40	80.00	0.00	120.00	132.00
16/au00565	Redesign	Senior Designer 2	-10	3.00	-3.00	60.00	-60.00	105.00	-105.00
		Subtotal for 16/au00565	17	28.00	4.70	387.00	-60.00	814.00	274.50
		Subtotal for Enterprise Trust	17	28.00	4.70	387.00	-60.00	814.00	274.50

Accounting Solutions for Business

Job number	Description		%	Est units	Act units	Est cost	Act cost	Est chg	Act chg
16/A050011	Website re-design	Alter	0	5.00	0.00	20.00	0.00	350.00	0.00
16/A050011	Website re-design	Client Services	12	15.00	18.00	180.00	360.00	525.00	630.00
16/A050011	Website re-design	Planning	0	4.00	0.00	0.00	0.00	300.00	0.00
		Subtotal for 16/A050011	75	24.00	18.00	200.00	360.00	1,175.00	630.00
		Subtotal for Accounting Solutions for Business	44	24.00	18.00	200.00	360.00	1,175.00	630.00

New columns added to Job/phase report

Three new columns have been added to job and phase level exports of the standard 'Job / phase report':

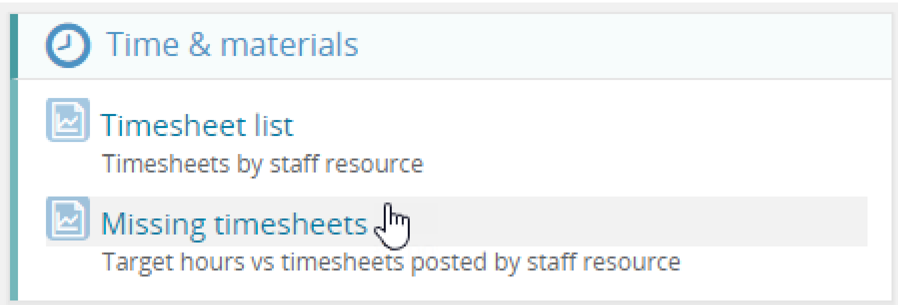
- Rating
- Source
- Weighting %

PDF option for Missing timesheet report

In addition to CSV formatting, 'Missing timesheets' can be viewed and printed as PDF files.

To view this feature:

- Select 'Standard reports' from the main menu
- Locate the 'Time & materials' panel and click 'Missing timesheets'



Purchase invoices awaited report - Defaults

Change to default settings

Default behaviour of this report has changed to include expenses; Filter options allow them to be suppressed.

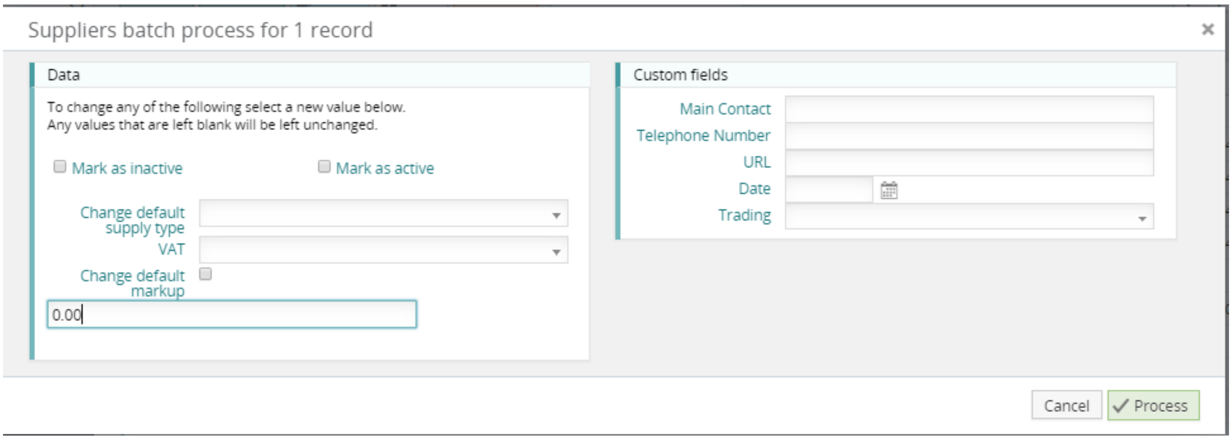
The previous default settings meant that if the expense sheet date was after the cut off and the expense line date was before the cut off, these expense costs were not included in accruals.

SUPPLIERS

Supplier list - Custom fields in batch updates

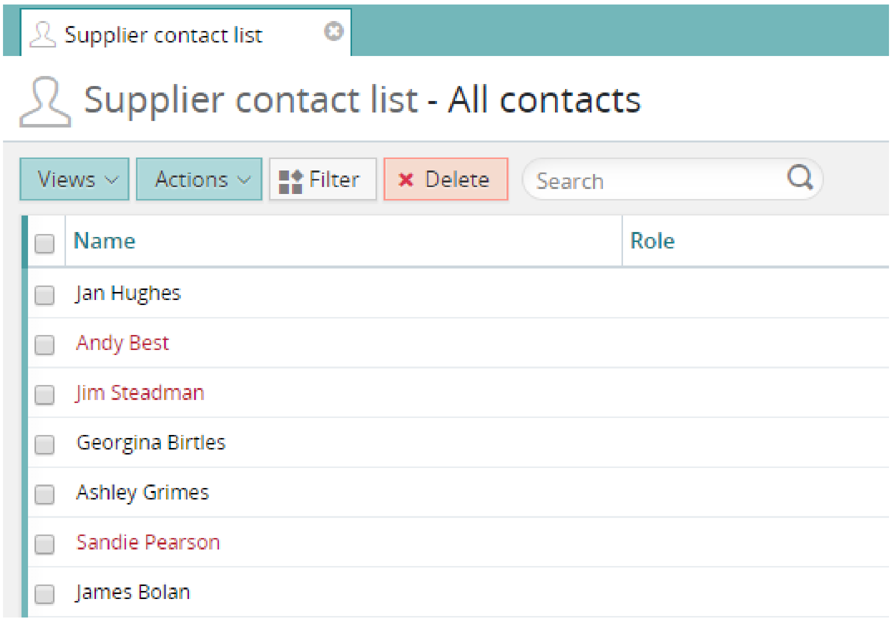
Custom fields can now be updated using the Batch update utility. This is accessed via the main 'Supplier list'.

Batch update



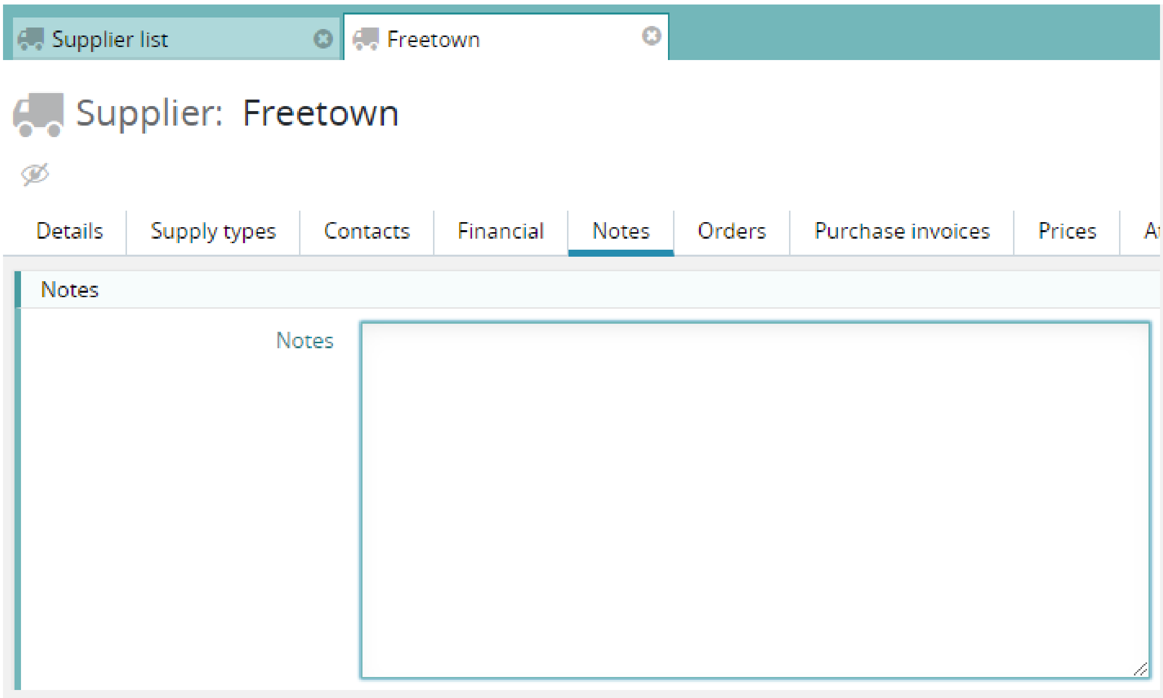
Inactive supplier shows in red

In the 'Supplier contact list', the name of an inactive supplier contact is highlighted in red.



Notes tab for suppliers

A new 'Notes' tab has been added for suppliers. This replaces the 'Notes' field that was previously located inside the 'Financial' tab.

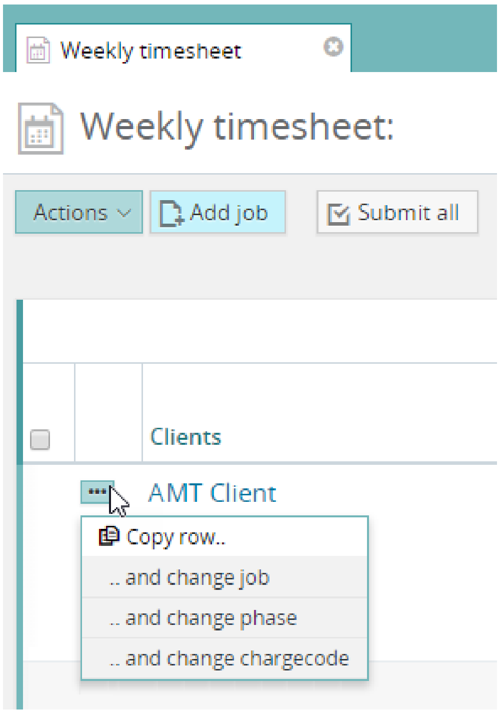


Weekly timesheet - Copy timesheet row

Submitted and Posted timesheet rows can now be copied. Previously this could only be done for rows with un-submitted data.

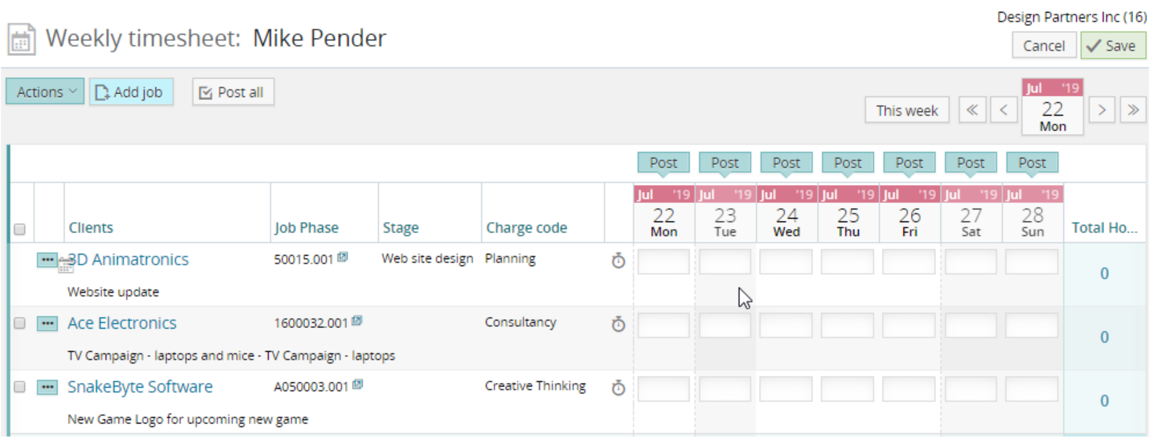
To access this feature:

- Select 'Weekly timesheet' in the main menu
- Locate the timesheet row
- Click the icon to reveal the drop-down menu



Weekly timesheet - Grey-out additional non-working days

In a weekly timesheet, the background colour of a non-working day is light grey. However, users are still allowed to book time to non-working days.

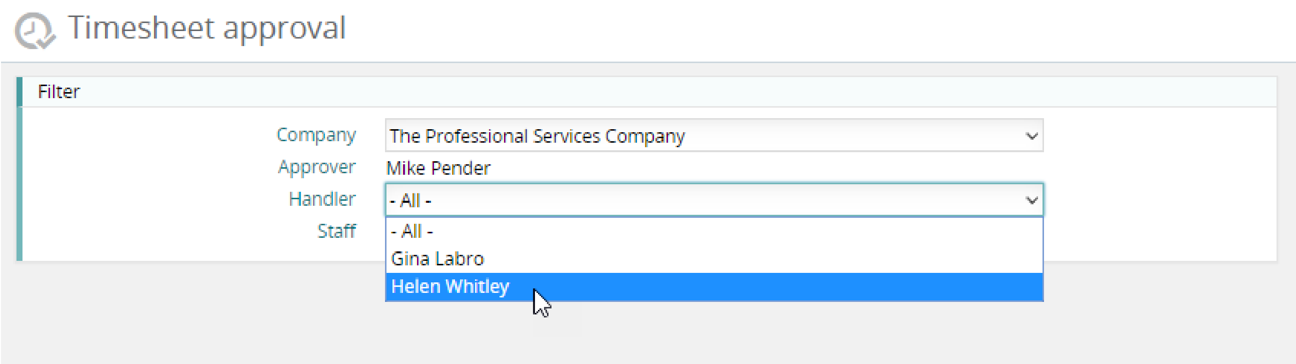


Timesheet approval – New filter

Ability to filter timesheets awaiting approval by phase handler.

If a user is an approver with the ability to approve staff timesheets, they may want to filter the timesheets they are approving to those posted on certain jobs. This feature enables the user to select a phase handler filter before selecting the staff whose timesheets they want to approve. For example, when a handler wants to approve submitted timesheets for work done on their jobs.

Timesheet approval staff selector

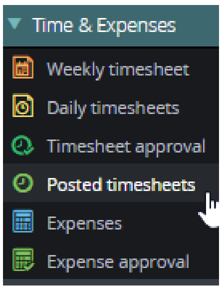


Posted timesheets list

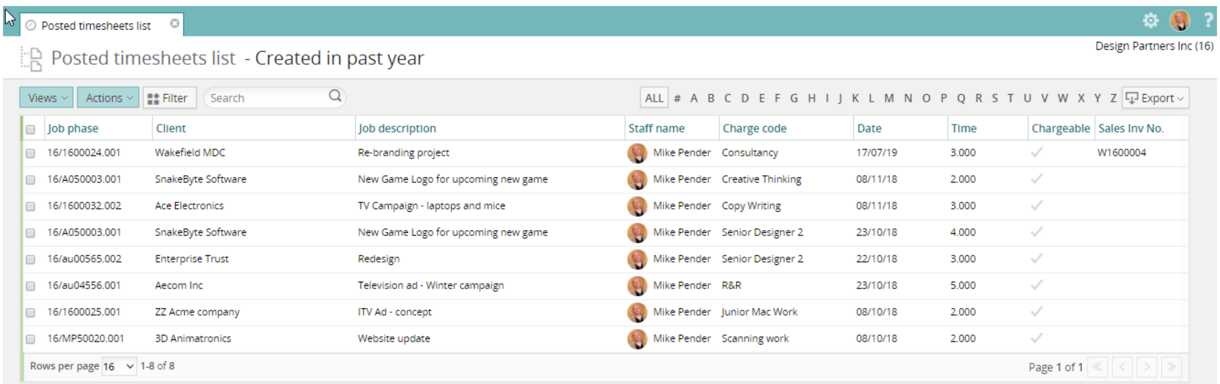
A list of posted timesheets is now available with filters and views to make it easy to track and analyse time being booked to jobs.

Main menu

The 'Posted timesheets list' is accessed by opening the 'Time & Expenses' area in the main menu and selecting 'Posted timesheets'.

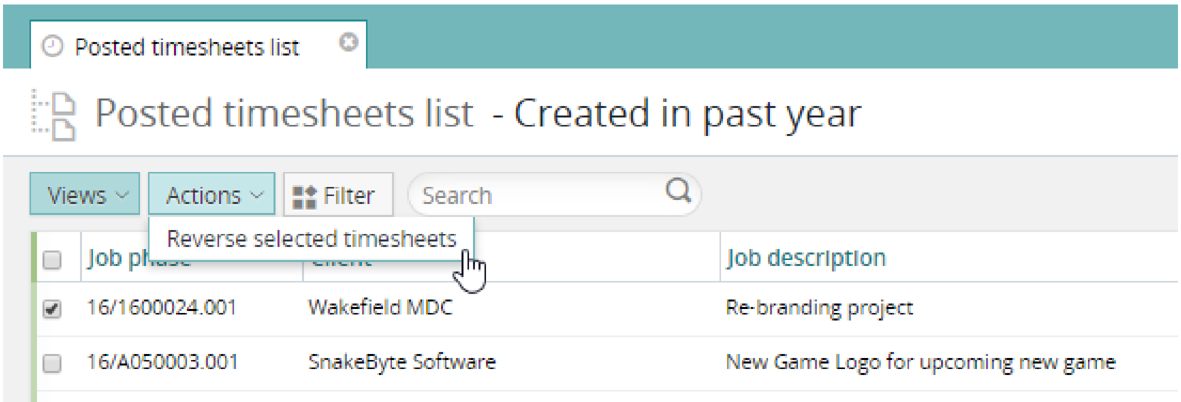


Timesheet list



Reversing a timesheet

Using the 'Actions' menu, it is possible to reverse one or more timesheets that may have been posted in error.



Processing

On selecting to reverse timesheets, new negative value pending timesheets are created. If the system does not use timesheet approval, or if the user doing the reversing action is a full approver, the newly created pending timesheets are immediately converted to real timesheets and posted.

Reversing timesheets can easily be spotted because they are of a negative value. On clicking one of these timesheets, the user sees that the 'Work done' comment displays 'when' and 'by whom' the timesheet was reversed.

GENERAL ENHANCEMENTS

Multi-user experience

New features have been added to enhance the multi-user experience.

Areas enhanced

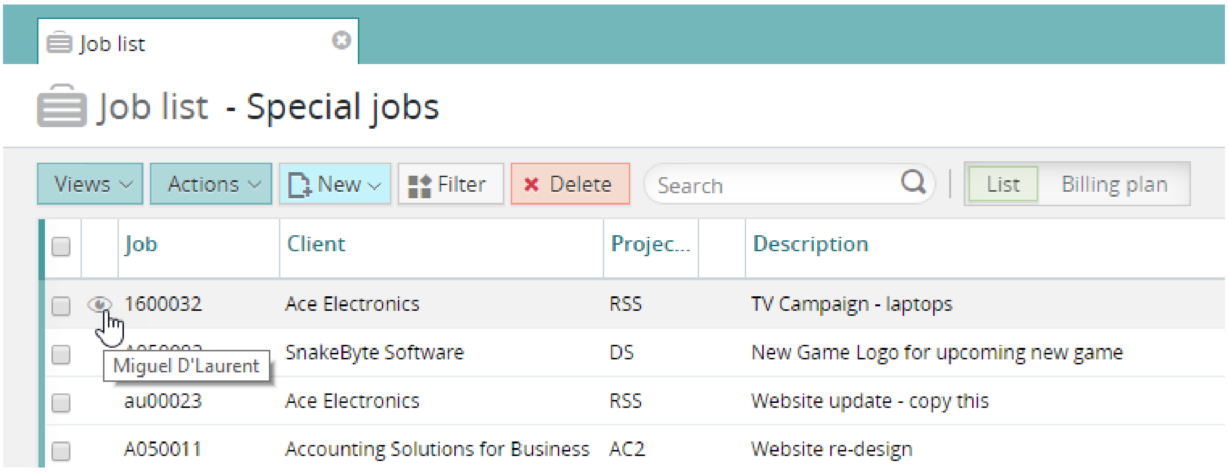
In v12.4, the following areas have been updated with new functionality:

- Clients
- Jobs
- Opportunities
- Phases
- Activities
- Suppliers

In future releases, other areas will also be enhanced.

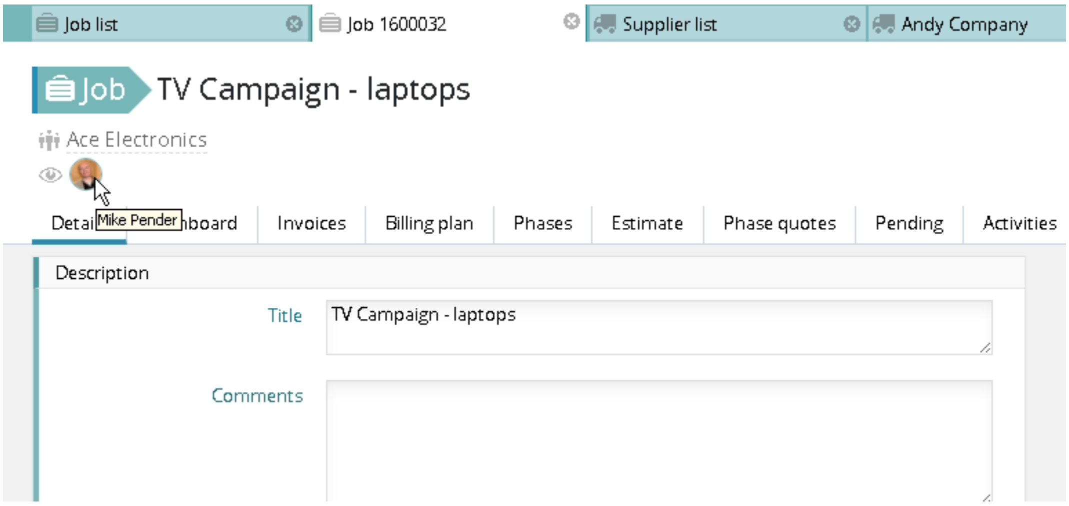
Main lists – visibility of users

In the main lists, if other users have records open, a small 'eye' icon appears on the left-hand side of the screen, against each open record in the list. Hovering the cursor over the icon displays a list of all the users currently looking at (or possibly amending) the record.



Records – visibility of users

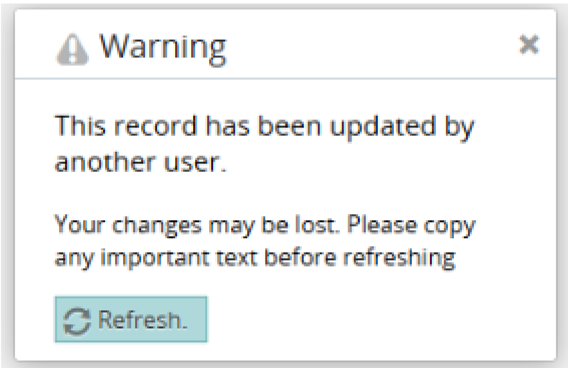
If more than one user has the same record open, the avatars for those users is displayed in the header.



Multiple users viewing the same record

Previously, the system saved a record if a user moved from one tab to another, even if no field changes had been made. Record saves now only occur when a user updates a field or executes an action. This means multiple users can view the same record simultaneously without being asked to re-load the record, unless another user has updated the record.

If another user has updated a record, the user sees the following message:

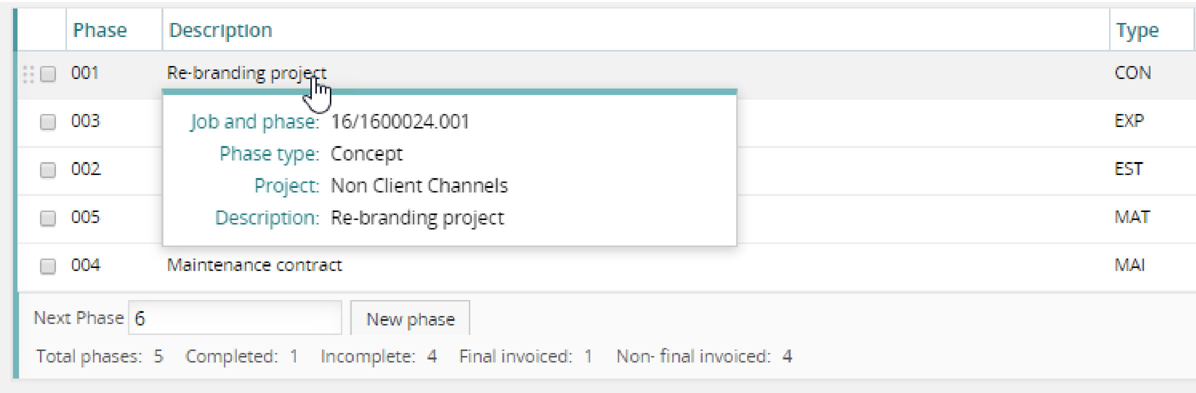


The warning message advises the user not to make any further changes to the record without first clicking on the 'Refresh' button. This new feature saves the user from having to close and re-open the record.

Hover text added to sub-lists

These are the lists that are found in certain tabs. Job/phases/activity lists are supported.

Example



Help system

Both the Synergist cloud and 4D client products now use the Zendesk help system located at:

https://synergistexpress.zendesk.com/hc/en-gb

Batch updates – Boolean custom fields now supported

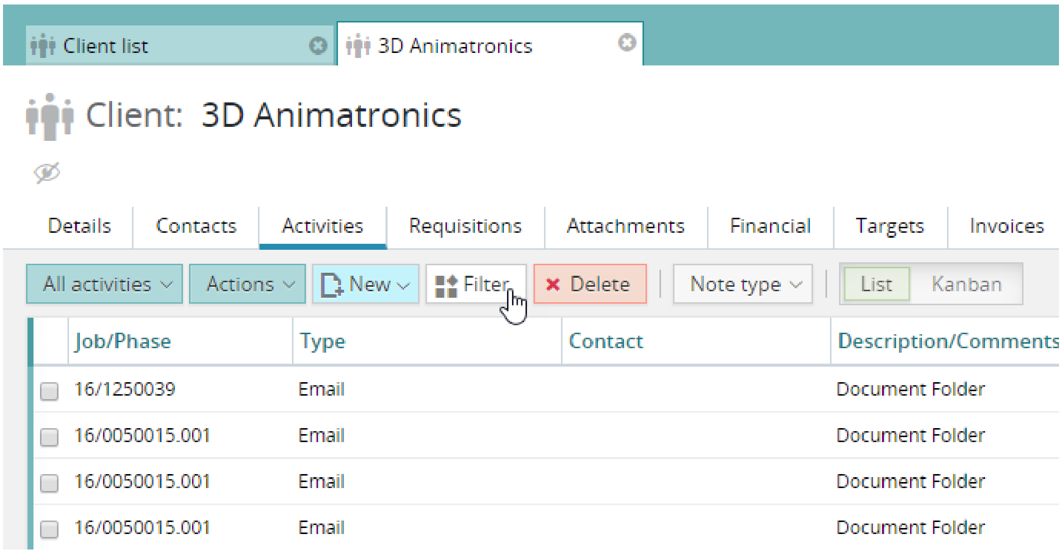
To batch update a custom Boolean field, select 'Yes' or 'No' from the drop-down menu. Selecting 'Yes' sets the field to TRUE. Selecting 'NO' sets the field to FALSE. Leaving the field blank, as with all batch updates, instructs the program not to update the field.

Example

Additional filter buttons

To help users amend their selected views, extra filter buttons have been added to the following areas:

- **Client** > 'Activities' tab and 'Attachments' tab
- **Client contact** > 'Activities' tab and 'Attachments' tab
- **Job** > 'Activities' tab and 'Attachments' tab
- **Phase** > 'Activities' tab and 'Attachments' tab
- **Stage** > 'Activities' tab and 'Attachments' tab
- **Supplier** > 'Orders' tab, 'Purchase Invoices' tab and 'Attachments' tab



Please note that the 'Filter button' does not appear on:

- Kanban views
- User defined tab views

Hovers added to key main lists

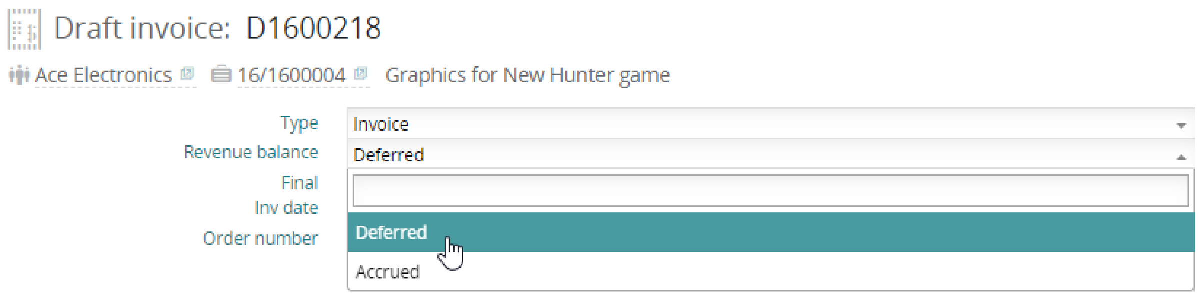
Hovers have been added to the following main lists:

- Client contacts
- Revenue management
- Invoices & drafts
- Projects
- Sub-Projects
- Stages
- Advanced features

Billing settings Accruals

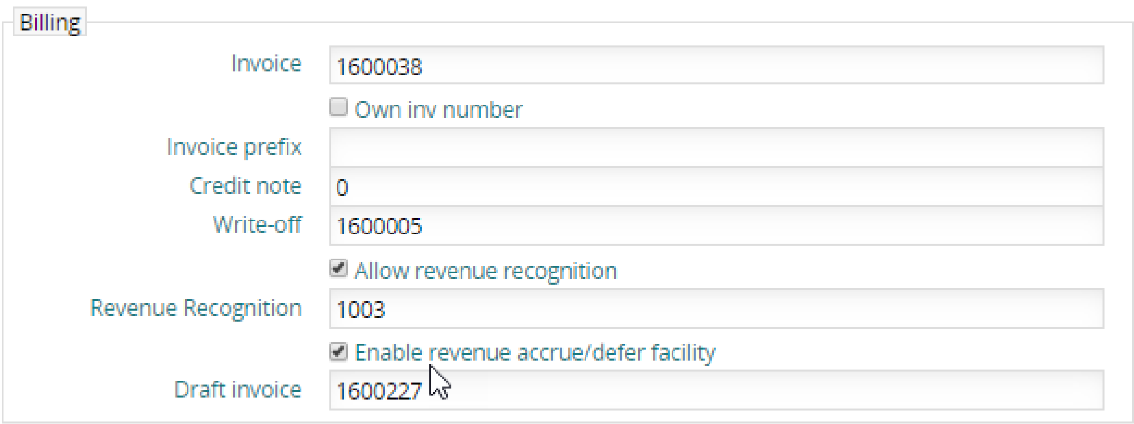
Invoice

In our 12.3 release, a feature to specific Deferred / Accrued on invoice headers was introduced.



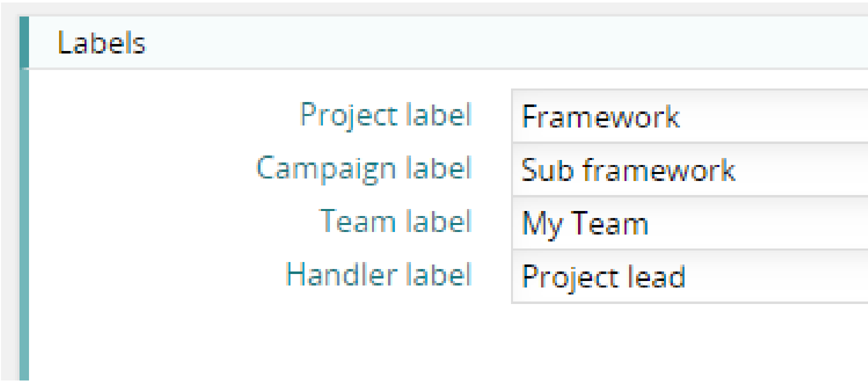
Company settings

This feature can now be shown/hidden by navigating to 'Company settings', selecting the 'Codes' tab and ticking/unticking the 'Enable revenue accrue/defer facility' box.



Custom labels

Certain key labels can now be customised. This feature helps consultancies who typically have different names for these key entities.



Custom fields – New URL custom field

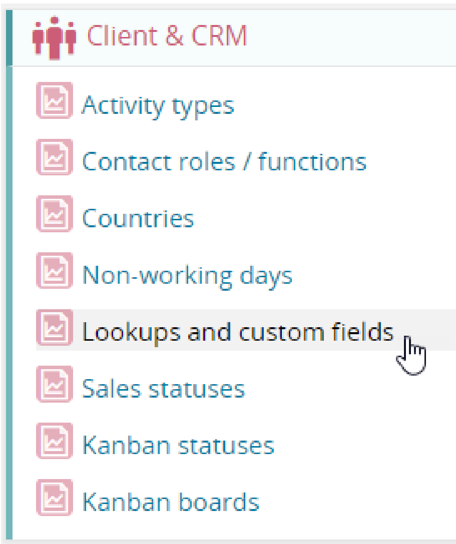
Custom fields were previously text, numeric, date or Boolean (Yes/No). A new type of 'URL' custom field has been added, enabling users to enter a URL and for it to work as a link.

'Custom fields' can be created in the following areas:

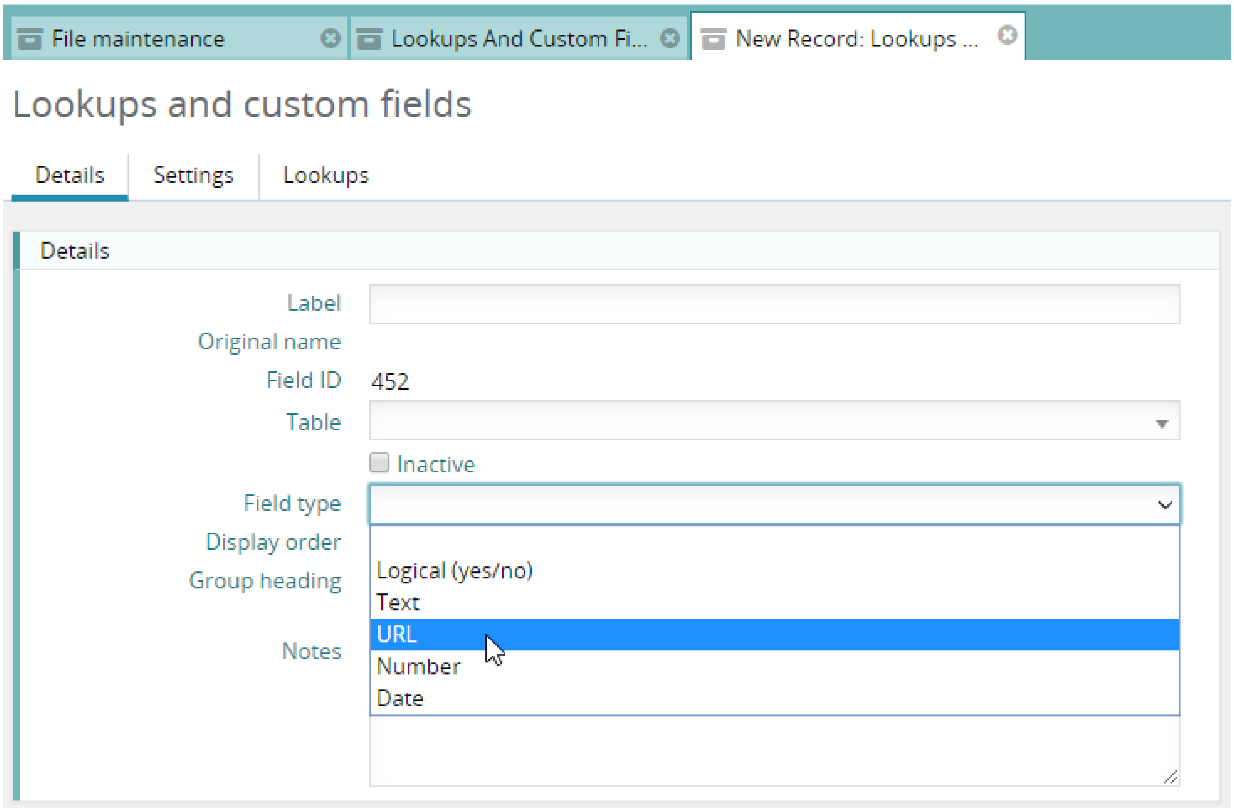
- Jobs
- Phases
- Contacts
- Organizations
- Stages
- Activities
- Suppliers
- Frameworks
- Sub Frameworks

Creating a URL custom field

- Navigate to 'Settings'
- Choose 'File Maintenance'
- Select 'Lookups and custom fields' in the 'Client & CRM' panel



- Click the 'New' button
- Complete the fields in the 'Details' screen



- **Label:** The name of the field that appears on screen
- **Table:** Where the Custom field is to be located
- **Field type:** Select 'URL' from the drop-down menu

Creating a link within a URL custom field

- Select 'Jobs' in the main menu
- Open a job
- Click the 'Details' tab
- Locate the custom fields panel
- Click on the  icon to type or paste a link in the field

Please remember to include **www.** when typing a URL address.

File Maintenance – 3 new options added to the Activity type table

To access these new options:

- Navigate to 'File Maintenance'
- Select 'Activity types'
- Choose an activity from the 'Activity types List'
- Click the 'Details' tab
- Locate the 3 new options in the 'Misc' panel on the right-hand side of the screen

Calendar options

The only option available is 'Owner'. Selecting this option defaults all new activities of this type to be available for display in calendars. The default setting can be overridden in actual activities.

Allow time sheet

This feature allows users to create timesheets on activities of this type.

The options are:

- No
- Owner only
- Anyone

Default owner / watcher

Selecting this option defaults all new activities of this type to have the creator of the activity set as owner, watcher or left blank.

The options are:

- No
- Owner
- Watcher
- Both (Owner & Watcher)