Version 12.5 - Release Notes

Synergist Browser Interface

August 2020

Please note: Synergist v12.5 requires 4D Server v17

These release notes relate to the Synergist browser interface only.

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Contents

OVERVIEW - V12.5 RELEASE

Synergist v12.5 includes enhancements to existing features, new areas of functionality and interface improvements - all designed to improve usability.

Key features in v12.5

Improved user interface

Synergist now has a fresher and cleaner look with improvements to the design across the board

Integrations

- MS Teams / Slack integration using channel email addresses
- QuickBooks integration now supported

Time & Expenses

- Delegate entry of timesheets & expenses
- Easier management of overtime in timesheet entry
- Option to delete timesheets

Scheduling of reports

- Easy access from the saved reports screen

Sales invoicing / planning

- Batch draft invoicing
- Billing plan locking – ability to lock / unlock multiple billing plans

Attachments

- Searchable across entire system

Calendar bookings

- Task date indicators to ensure deadlines are met

Time & bookings feature

- General refinements to this popular feature originally released in v12.4

Administration & Set-up

- Two factor authentication for Synergist
- Staff record - Weekly hours required / target chargeable - % option
- User table - batch update available
- Comprehensive exports from all File Maintenance tables
- Assigning users to client - improved functionality

Gantt charts

- Improvements to Gantt chart output (PDF & Image)
- MS Project export option

Misc.

Use of an emoji in Synergist text fields
Option for holidays to be deducted from targets (Utilisation report & dashboard)

UI & DESIGN

Synergist now has a fresher and cleaner look

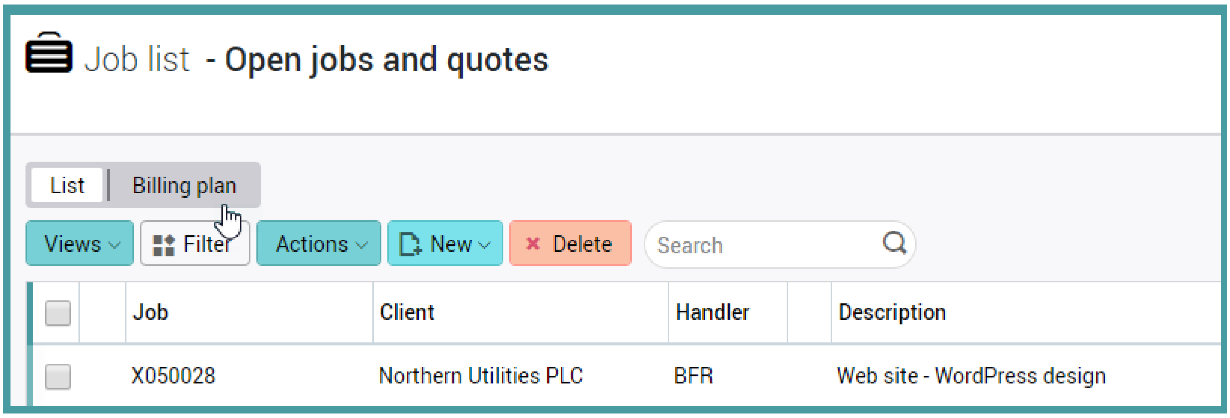
Examples of changes made to the UI, along with general functional improvements are listed below.

Login screen

A brighter, more contrasting style complimented with larger input fields and buttons.

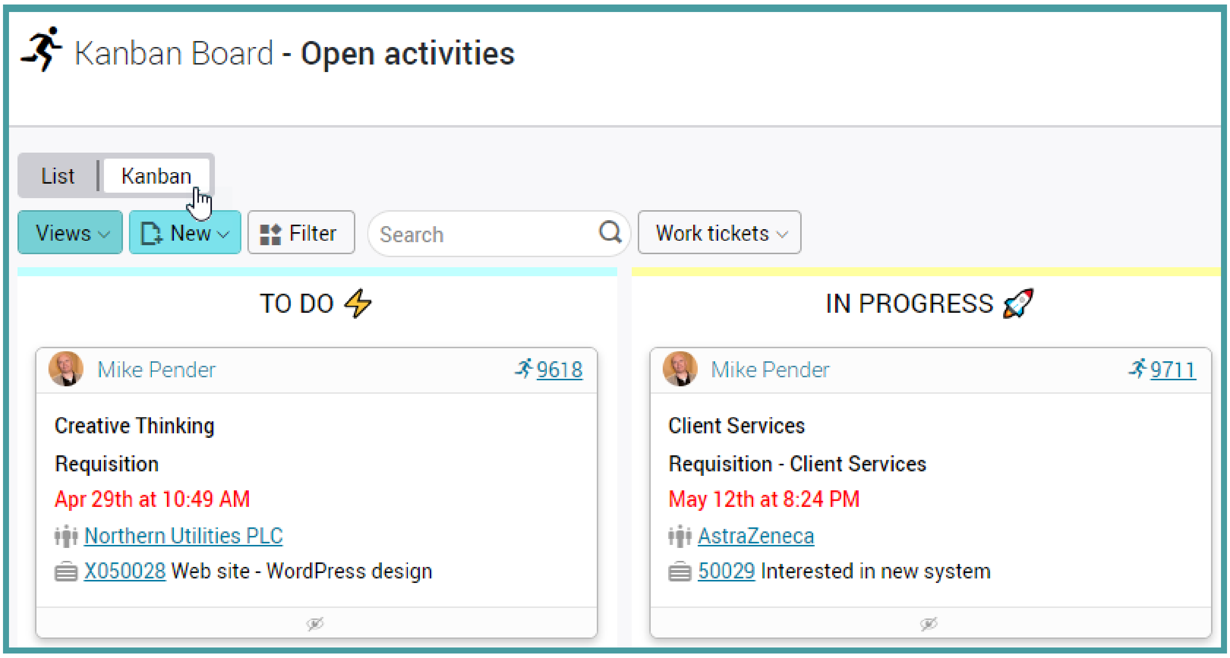
Cleaner and less cluttered list forms

Example: Job list.



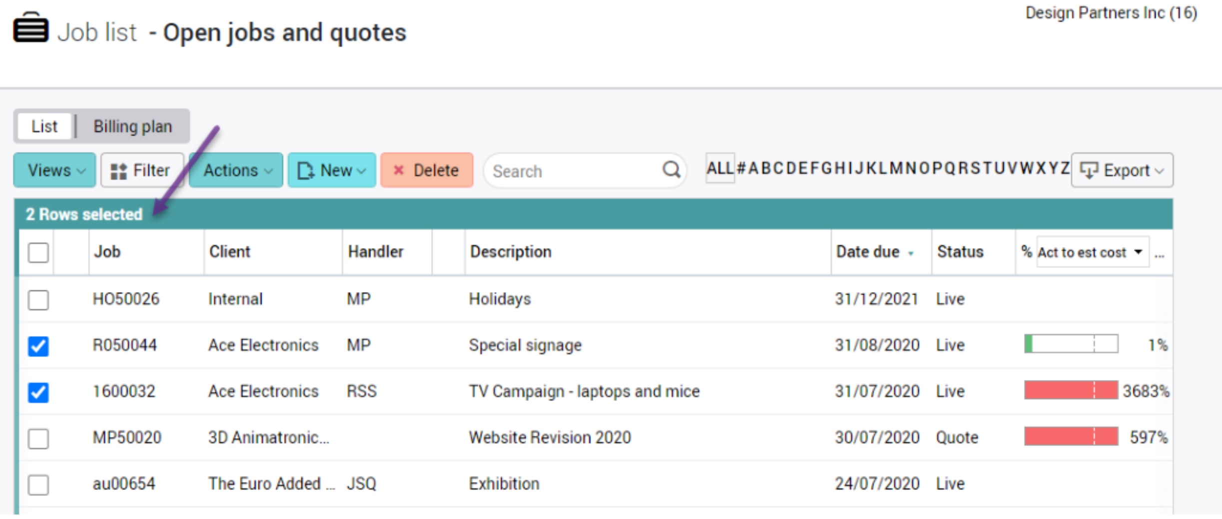
Kanban board

Optimised Kanban board and cards.



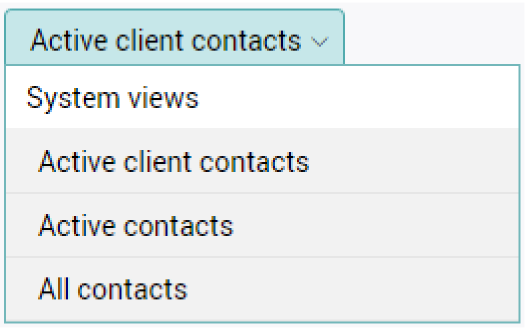
Batch processing - row count

The number of rows selected is clearly displayed at the top of the table - an important feature when batch processing or batch deleting.



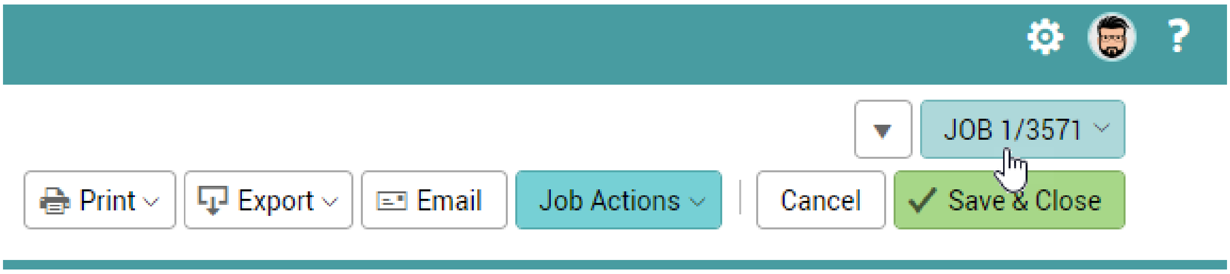
Views, filters and batch processing added to many 'in-tab' lists

Example: Client & Supplier – 'Contacts' tab.



Client, job & phase cards – design improvements

The company number has been added to 'Job' and 'Phase' input screens, reminding users of which company they are in. For details of UI improvements to the cards, please see Clients & Suppliers.



Scrolling lists

Main lists, including quotes and estimates, have been enhanced to ensure column headings always remain in view - a useful feature when scrolling through long lists.

INTEGRATIONS

Simple MS Teams / Slack integration using email

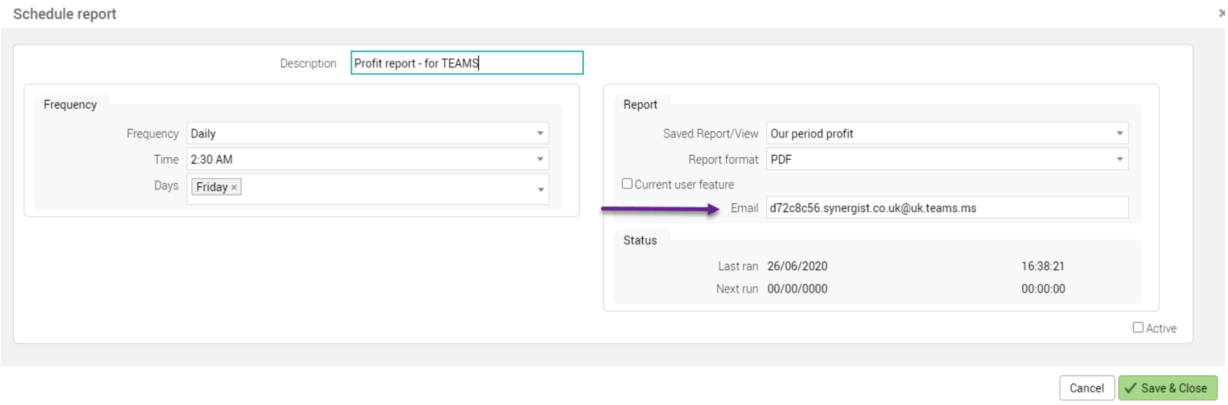
Both MS Teams and Slack provide a feature allowing users to post to a channel using an email address. This feature is useful for publishing scheduled reports.

Note: Emailing to an MS Teams channel requires a synergist cloud installation

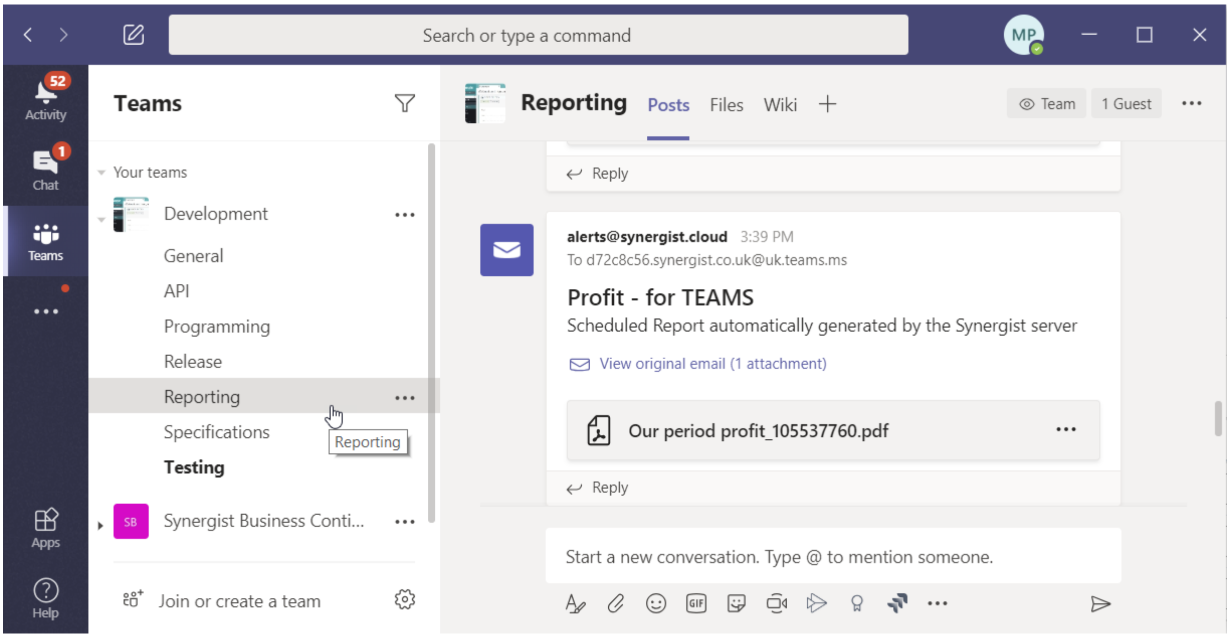
Set up a scheduled report

This can now be accomplished from the 'Saved Reports' Section – please see below.

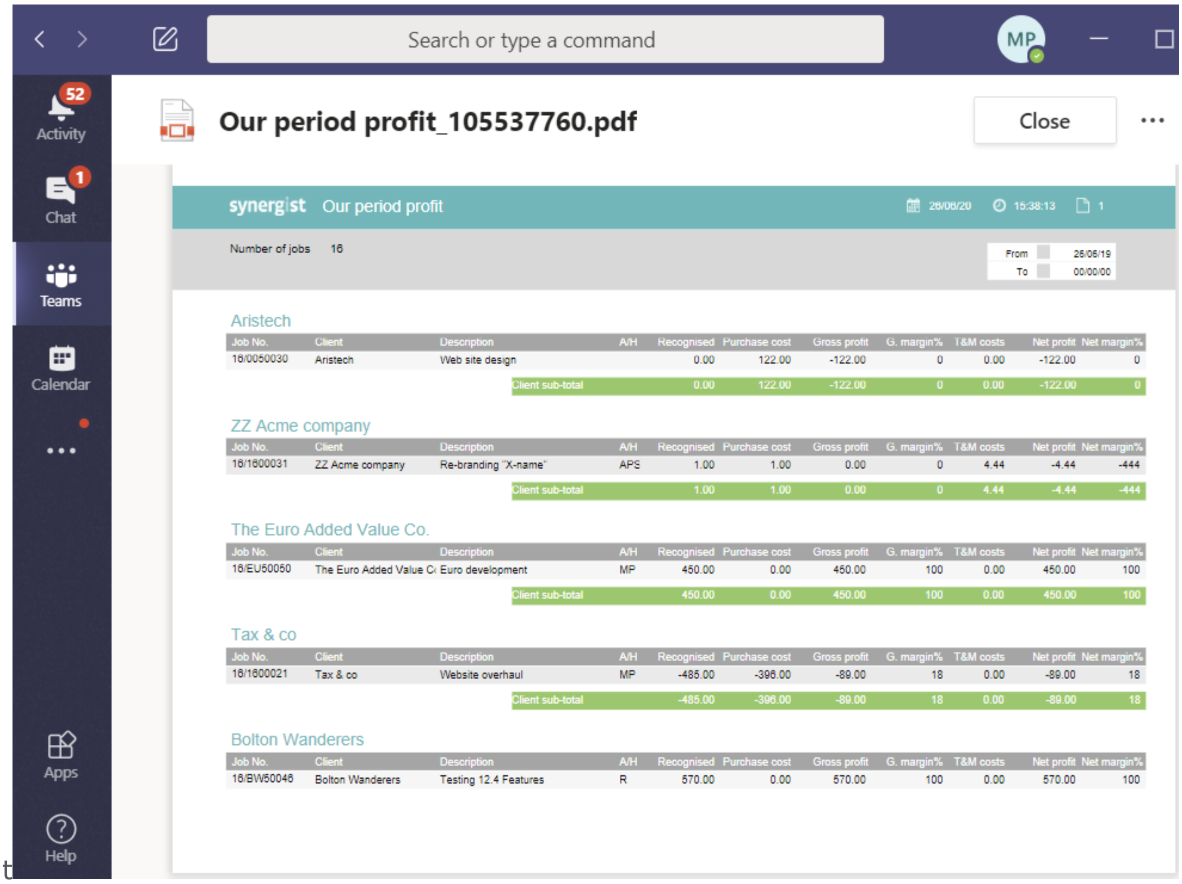
Paste in the Teams / Slack email address for the channel being targeted:



The Report notification displays in the Teams/Slack channel:



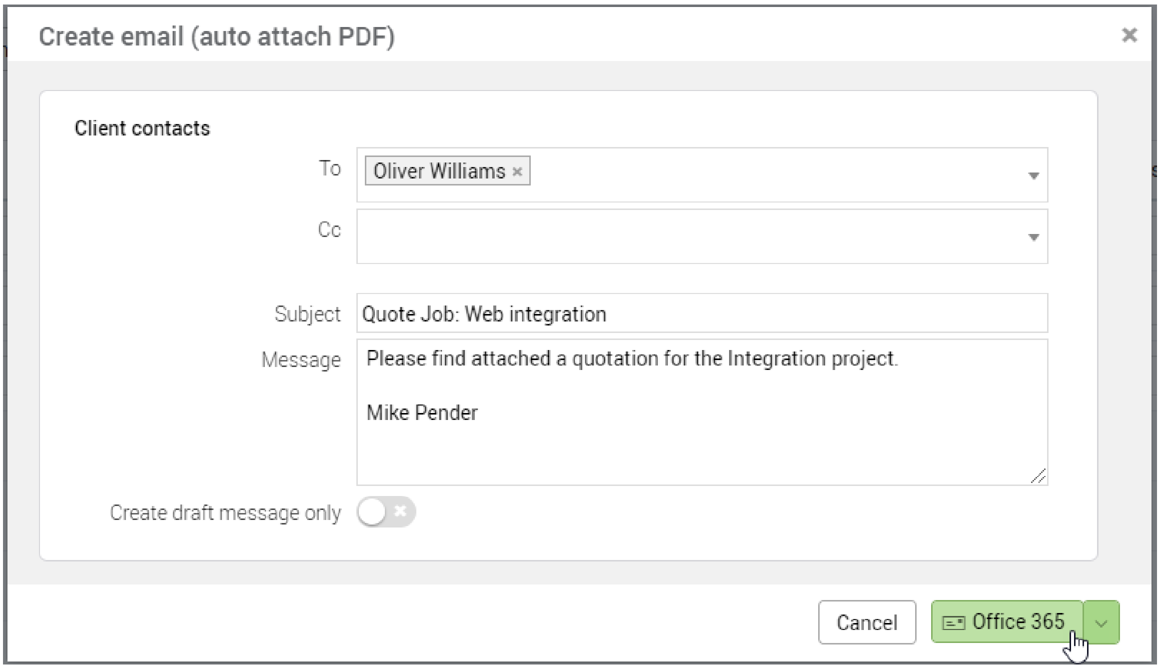
Click on the PDF icon to display the report:



Web Email Integration

The Web Email integration module now supports sending emails from within Synergist. Use the switch on the form to create draft emails.

Note: Previous functionality is still available.



DELEGATION

Delegate entry of time & expenses

The delegation feature enables users with the required approval permissions to enter timesheets and expenses for members of staff, such as sub-contractors or freelancers who may not have access to Synergist.

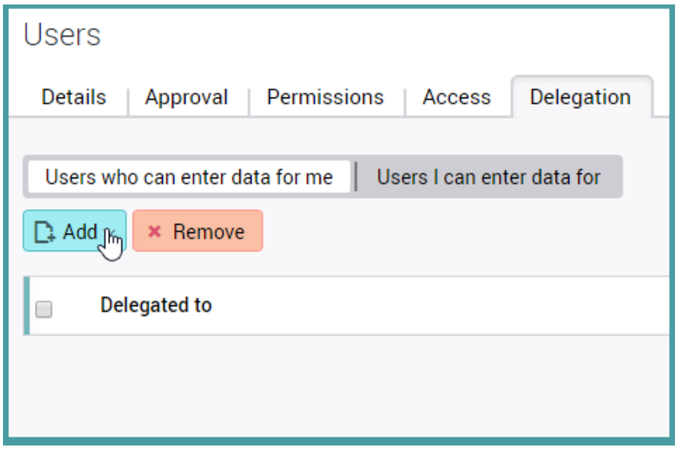
Delegating the entry of expenses also enables a PA to enter expenses for a senior member of staff. In this scenario, both parties must be set up as users in Synergist.

The delegation feature is available in:

- Weekly timesheet
- Daily timesheets
- Expenses Entry

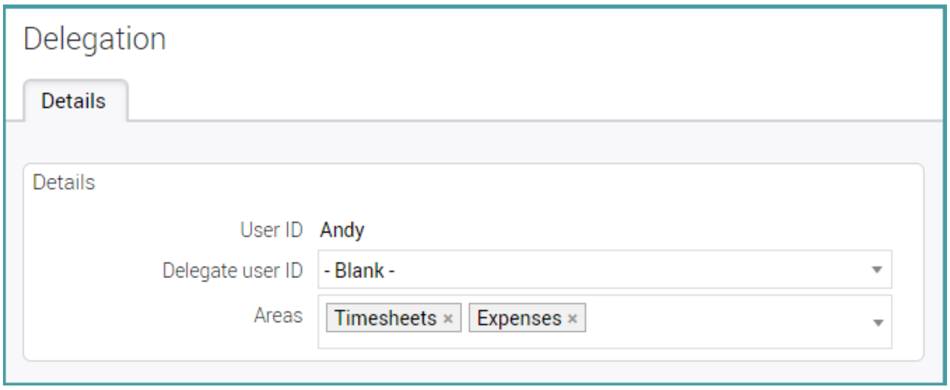
To add or remove delegation permissions:

- Navigate to Settings and choose File Maintenance
- Click 'Users' in the 'Users & Staff' panel
- Locate and open the required user record
- Press the 'Delegation' tab
- Select either 'Users who can enter data for me' or 'Users I can enter data for'
- Click the 'Add' button



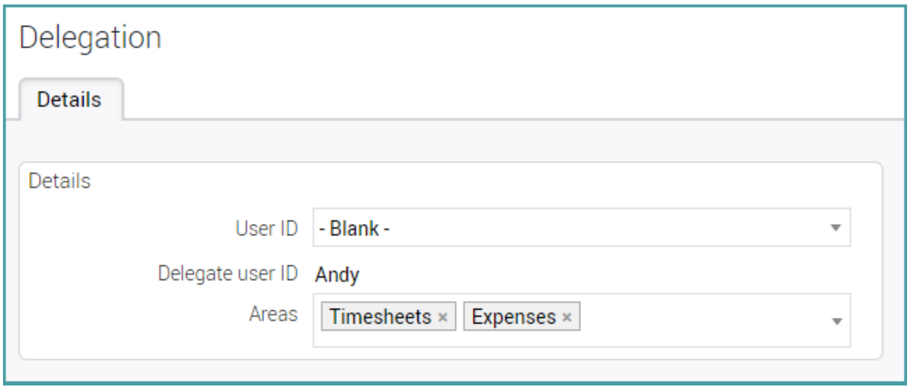
If 'Users who can enter data for me' is chosen, click on:

- 'Delegate user ID' to pick a delegate
- 'Areas' to select timesheets and/or expenses



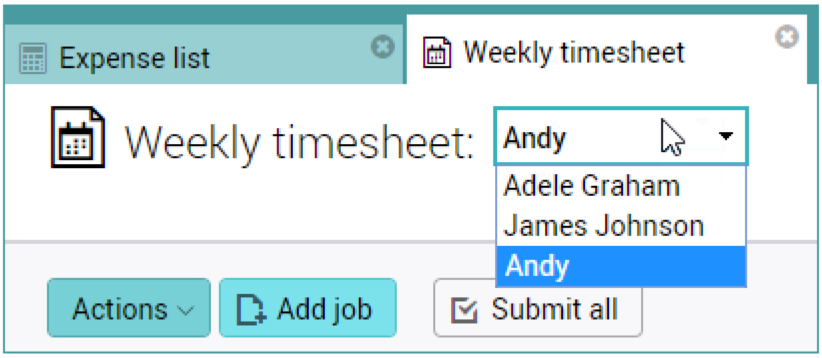
If 'Users I can enter data for' is chosen, click on:

- 'User ID' to pick a user
- 'Areas' to select timesheets and/or expenses



Using the delegate feature in Weekly timesheet

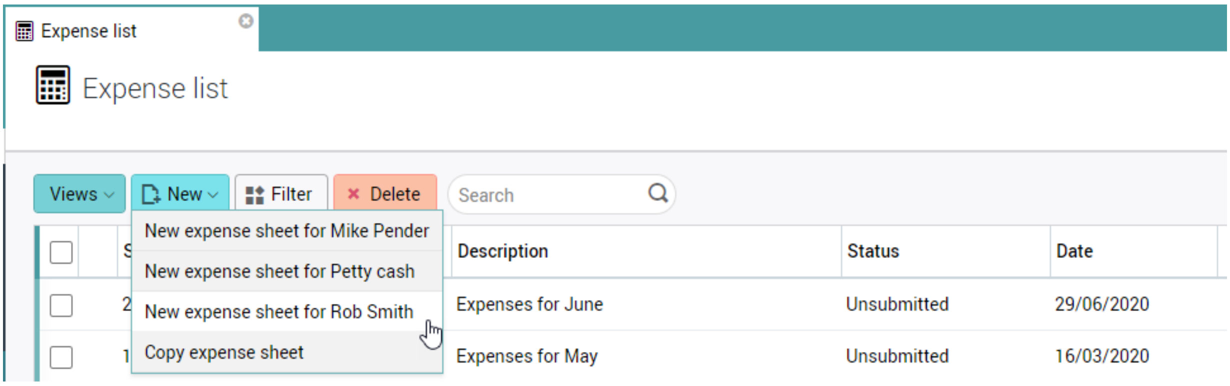
In Weekly timesheet, select the user you are delegated to enter timesheets for. Enter and submit/post details in the usual way. Please note that alerts generated as part of the approval process are emailed to the delegate.



Using the delegate feature in expenses

Users with expense entry delegation approval can create expense sheets for their delegates via the dropdown list of expense accounts.

In the following example, Mike Pender is logged in and can create an expense sheet for Rob Smith. Apart from this new feature, the process of creating expense lines and submitting sheets remains the same. Please note that approval related alerts are emailed to the delegate.



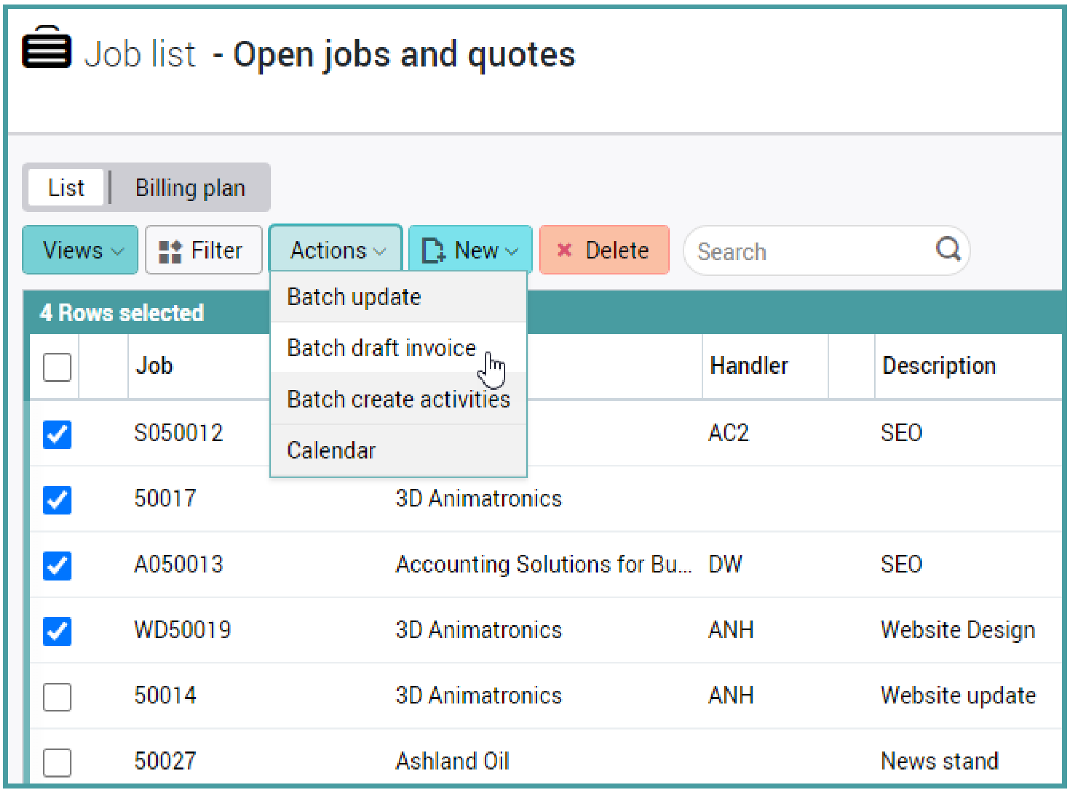
INVOICING

Batch draft invoicing

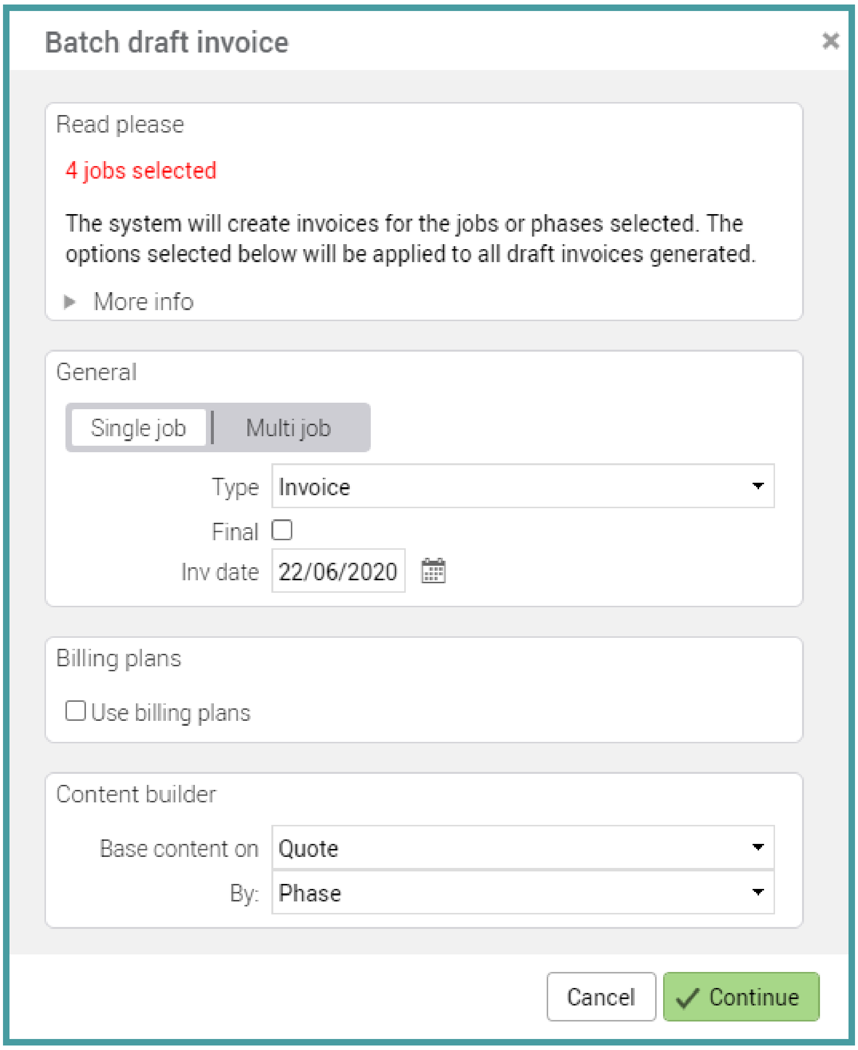
The 'Batch draft invoicing' feature makes it possible to create draft invoices across multiple clients and jobs. This flexible feature enables the creation of a single invoice on a single job for a single client all the way up to the creation of multiple invoices for multiple jobs across multiple clients.

The 'Batch draft invoicing' feature is available in the following areas:

- Job list
- Phase list
- Client job list
- Client phase list



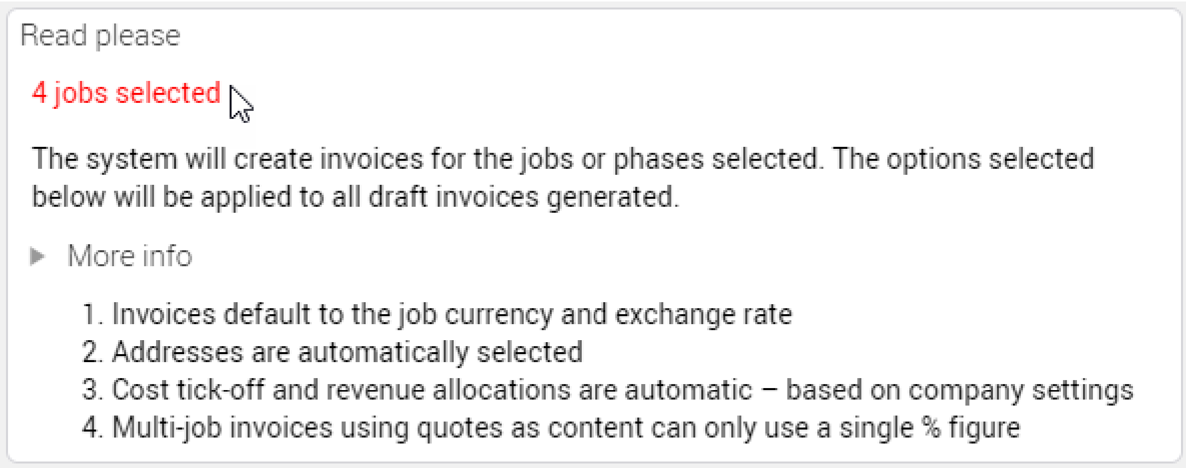
Example of the 'Batch draft invoicing' window:



Please read below for a description of the options.

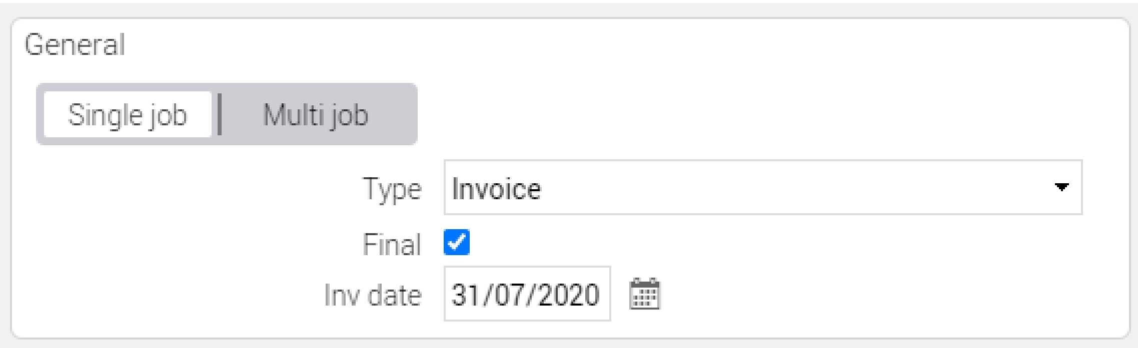
'Read please' panel

The first panel in the 'Batch draft invoicing' window is labelled 'Read please'. The panel communicates the number of jobs selected for invoicing, along with some additional information.



'General' panel

The second panel in the 'Batch draft invoicing' window is labelled 'General' and contains 4 controllers:



Single job - creates a draft invoice for each job selected

Multi job - groups jobs for the same client onto one invoice

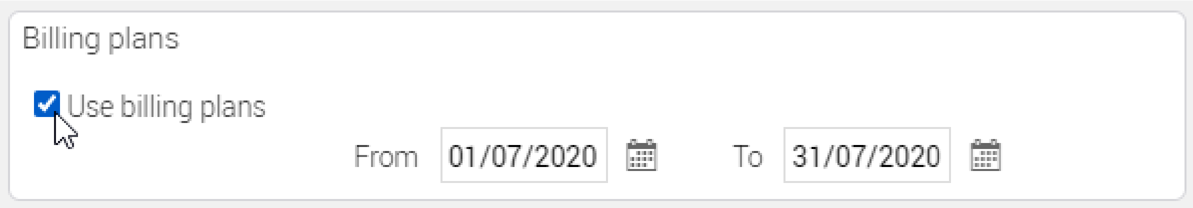
Type - options are 'Invoice', 'Credit' or 'Write-off'

Final - ticking the box marks all the batched invoices as 'Final'

Inv date - sets the invoice date (the default invoice date is set to today's date)

'Billing plans' panel

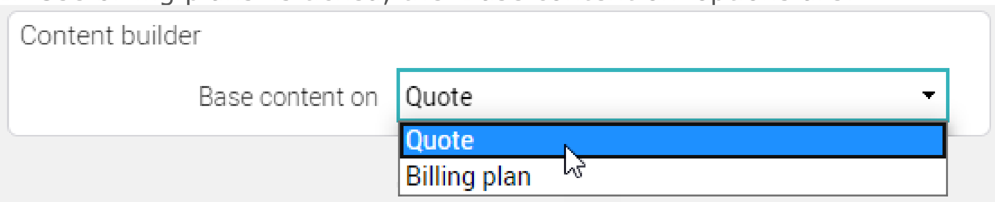
The third panel in the 'Batch invoicing' window is labelled 'Billing plans'. Tick the checkbox to use billing plans and click on the calendar icons to set the 'From' and 'To' billing plans date range. By default, the range selects all the jobs' billing plans for the current month.



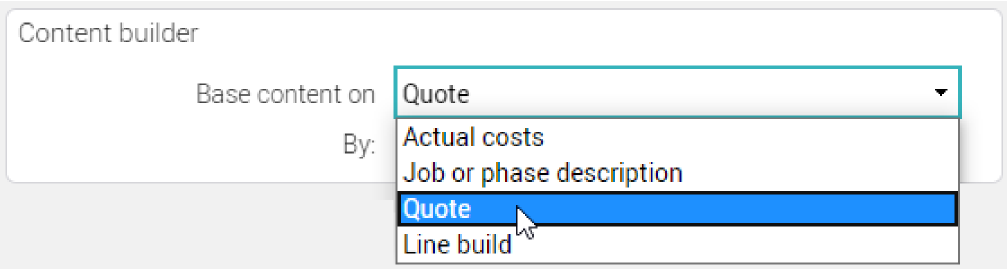
'Content builder' panel

The final panel in the Batch invoicing window is the 'Content builder'.

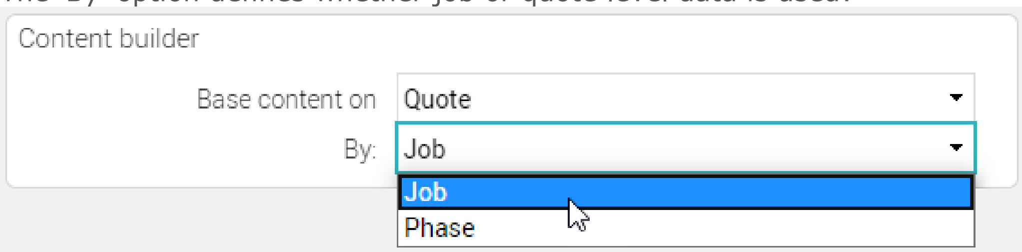
If 'Use billing plans' is ticked, the 'Base content on' options are:



If 'Use billing plans' is unticked, there are more 'Base content on' options and an additional option to base the content by job or phase:

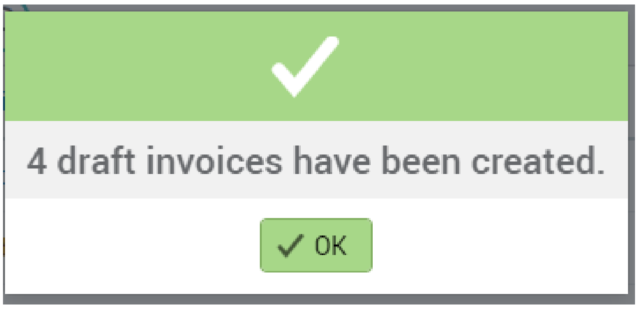


The 'By' option defines whether job or quote level data is used:

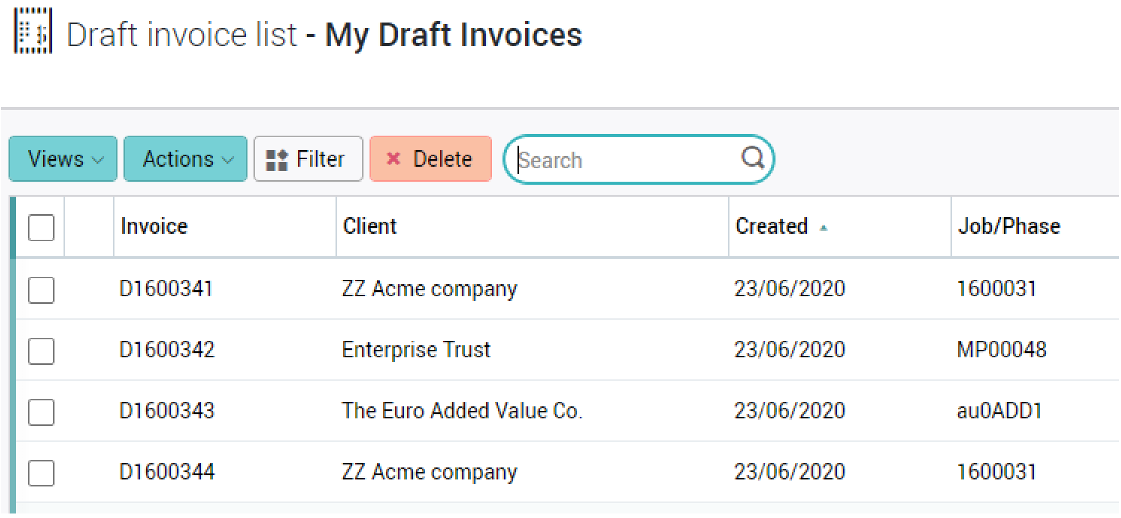


Creating the batch

After making selections in the Batch draft invoicing form, click 'Continue' to create the batch of draft invoices. The system responds with a confirmation message:



To view the newly created draft invoices, navigate to the 'Draft invoice list'.

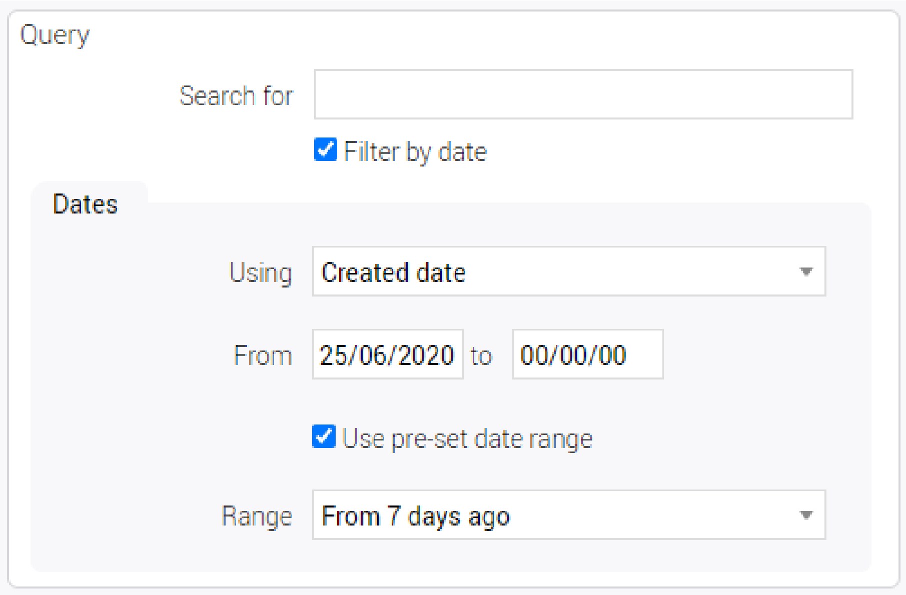


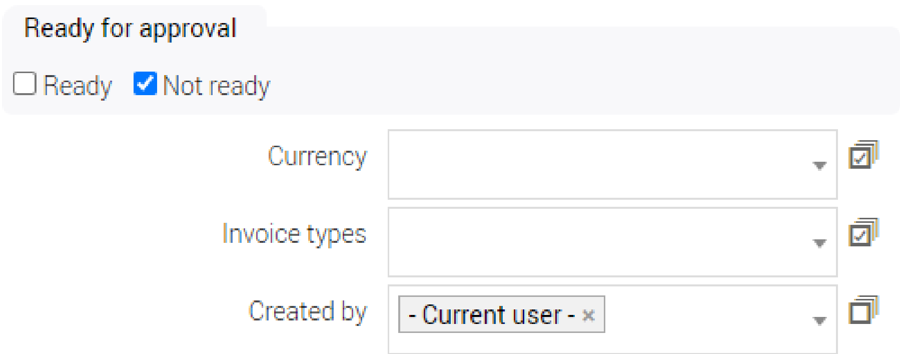
Invoice	Client	Created	Job/Phase
D1600341	ZZ Acme company	23/06/2020	1600031
D1600342	Enterprise Trust	23/06/2020	MP00048
D1600343	The Euro Added Value Co.	23/06/2020	au0ADD1
D1600344	ZZ Acme company	23/06/2020	1600031

Creating a view to make it easier to locate newly created draft invoices

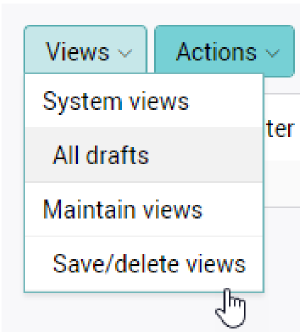
To easily identify recently created draft invoices, set up a personal view in the Draft invoice list.

In the following example, the Draft invoice list displays all draft invoices created in the past week:





After completing the selections, click on the 'Apply filter' button and save the view in the Draft invoice list.



Additional filters added to the Draft invoice list

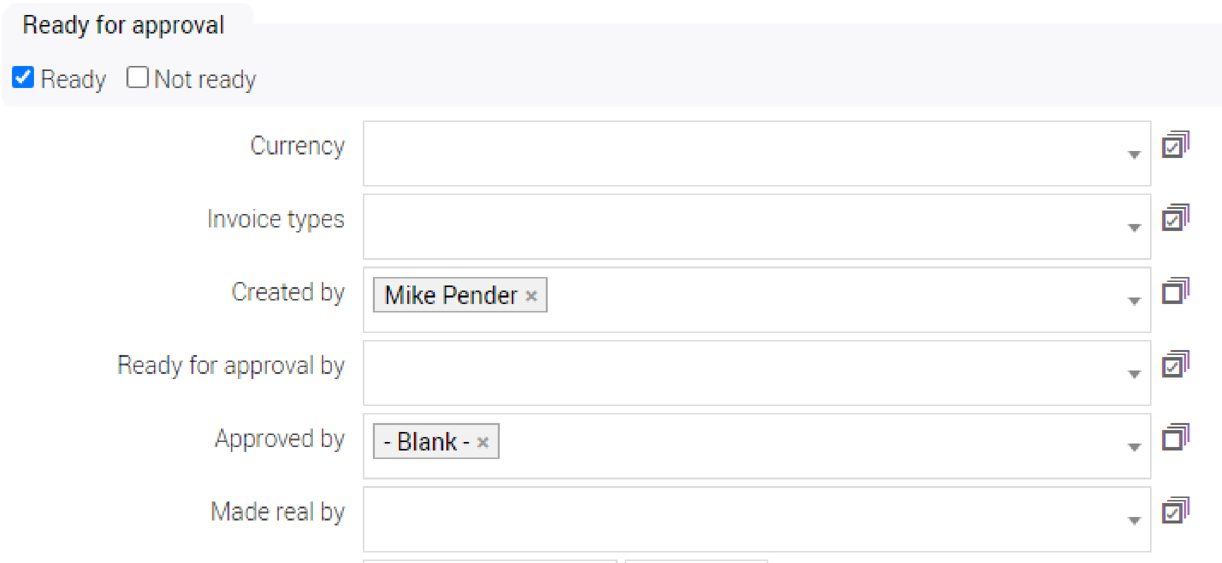
The following filters have been added to the filters in the 'Invoice list' and 'Draft invoice list':

- Created by
- Ready for approval by
- Approved by
- Made real by

These filters are helpful in creating a more personalised view, such as 'Invoices for approval'.

Example:

The following filter creates a list view displaying all draft invoices created by Mike Pender which are ready for approval:

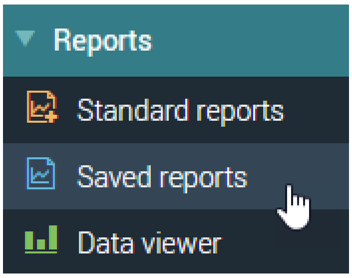


SCHEDULING REPORTS

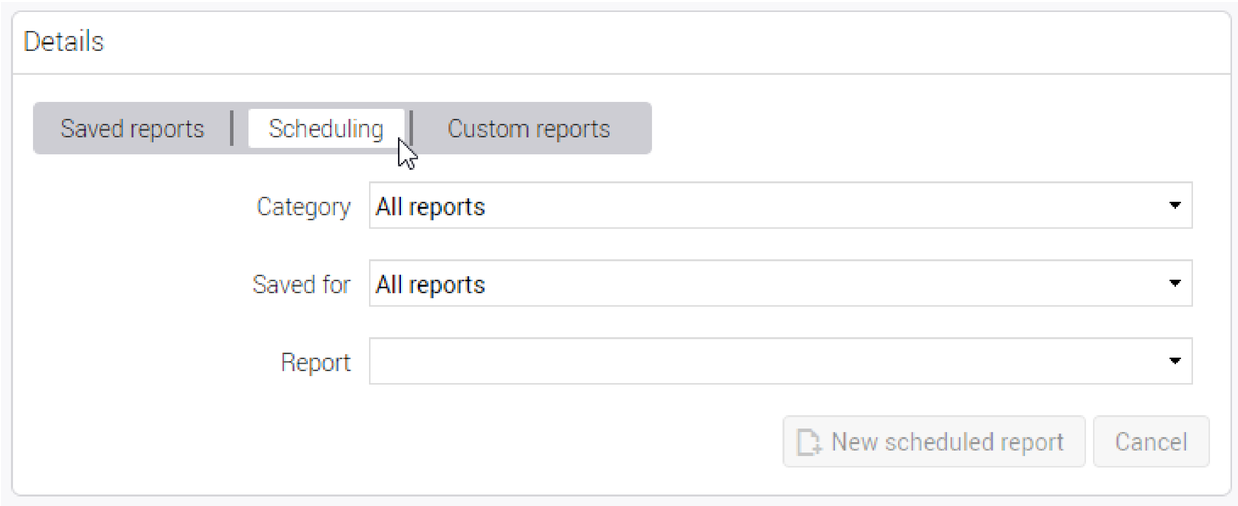
Easier access to report scheduling

Please note: The Scheduled Reports feature of Synergist Cloud requires Professional or Enterprise tier.

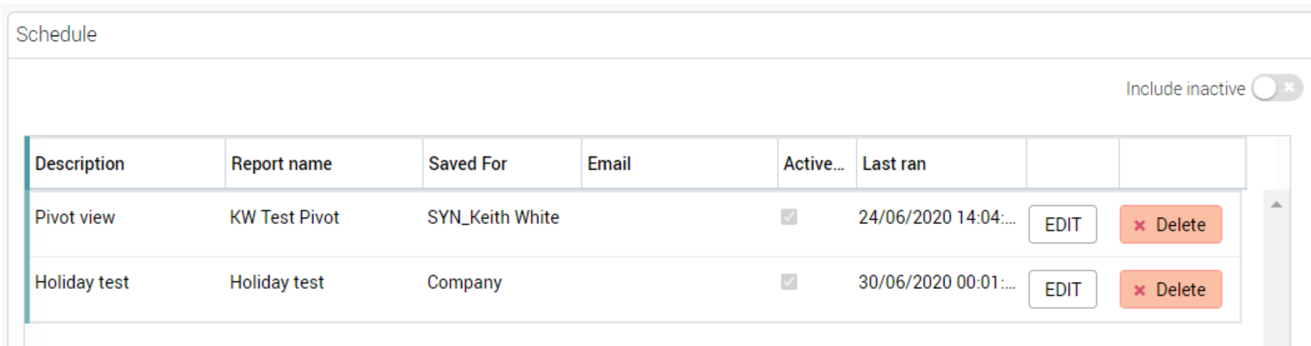
Scheduling of reports used to require access to the System Utilities section.
The new feature facilitates the scheduling of reports from the 'Saved Reports' link in the main menu.



A new 'Scheduling' option has been added to the existing 'Saved' and 'Custom' reports.
A scheduled report is a report that has first been saved as a 'Saved report' and then set up to run automatically on a scheduled basis.

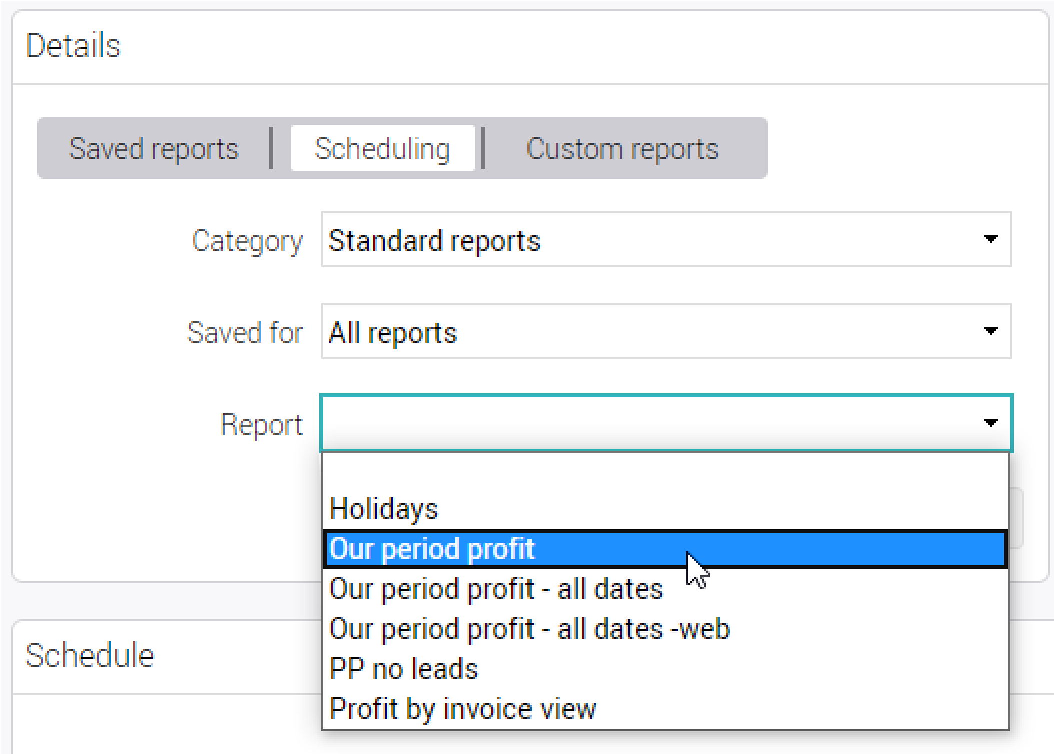


On selecting the 'Scheduling' option, a list of active scheduled reports becomes viewable:

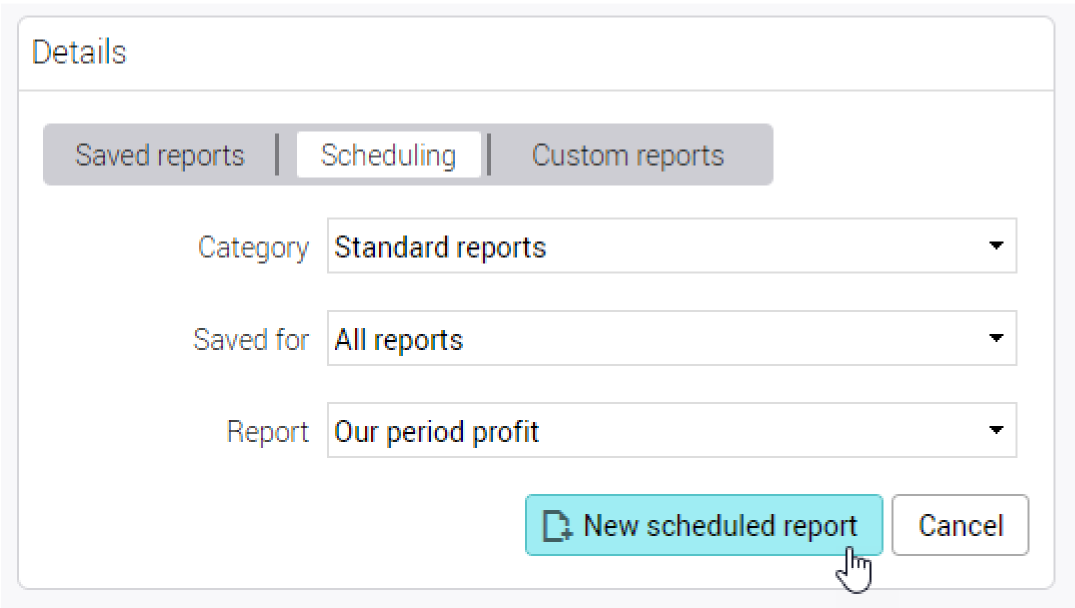


Scheduling a saved report

Select the 'Scheduling' option, followed by a saved report from the 'Report' list:



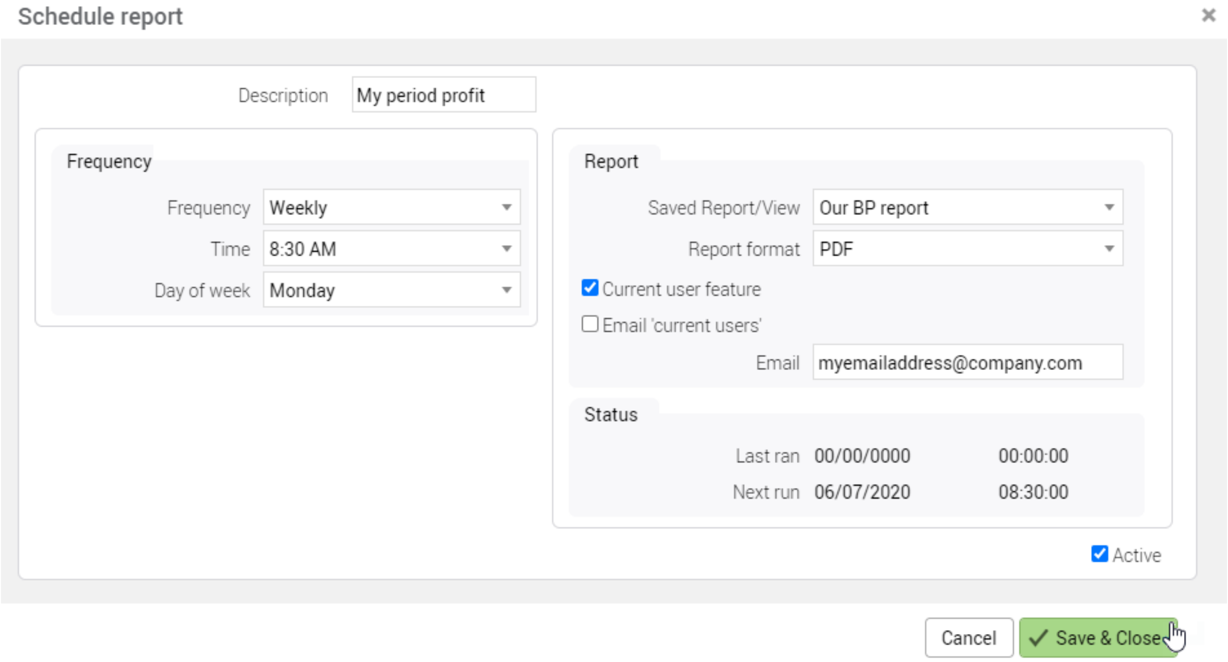
Click on the 'New scheduled report' button which has become active:



Schedule report form

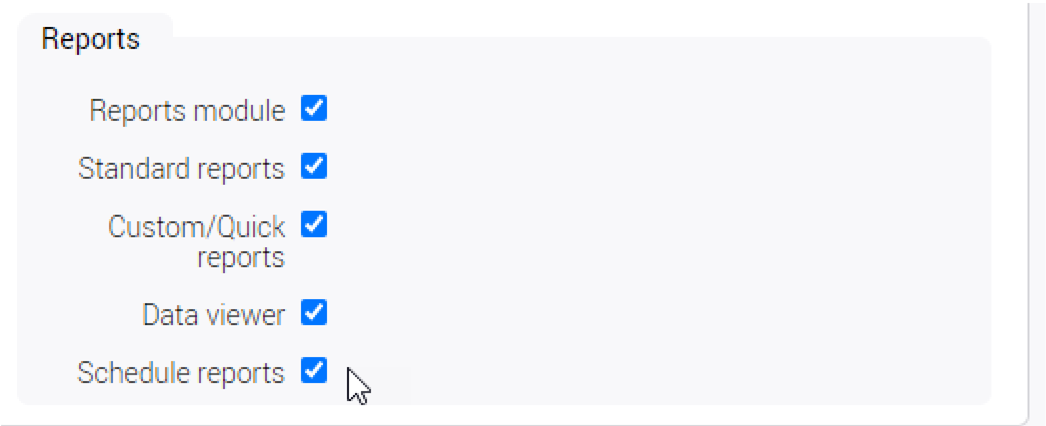
After filling in the 'Schedule report form', click 'Save & Close'.

Note: When ready to have the report run as a live scheduled report, tick the 'Active' checkbox.



User permissions

Access to the 'Schedule reports' feature is set in the permissions section of the user record.



Copying a job template with a fixed date billing plan

Billing plans can be set up to operate at job and/or phase level. When being created, they can have either a fixed or relative date.

If a fixed date is selected, the date remains unchanged - no matter what other dates are amended.

Alternatively, a relative date may be selected with options to use a date relative to:

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

If a job with a fixed date is copied, the fixed dates in the billing plan remain fixed.

If a job with a relative date is copied, the relative dates in the billing plan remain relative.

However, if a job with a billing plan is converted into a template, copying the template results in all dates becoming relative dates.

Multi-job billing plan – export

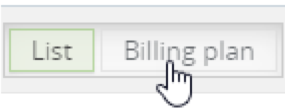
Previously, only the Job list and Phase list tables could be exported. The export feature has been enhanced to export billing plans. This feature is available in:

- Jobs list > Billing plan button > Export
- Phase list > Billing plan button > Export
- Client list > select a client > Jobs tab > Billing plan button > Export
- Client list > select a client > Phases tab > Billing plan button > Export

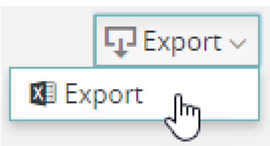
Example:

- Click on 'Jobs' in the main menu to access the 'Job list'

- Press the 'Billing plan' button towards the top of the screen



- Click on the 'Export' button towards the top right of the screen and choose the 'Export' option to generate a .CSV file

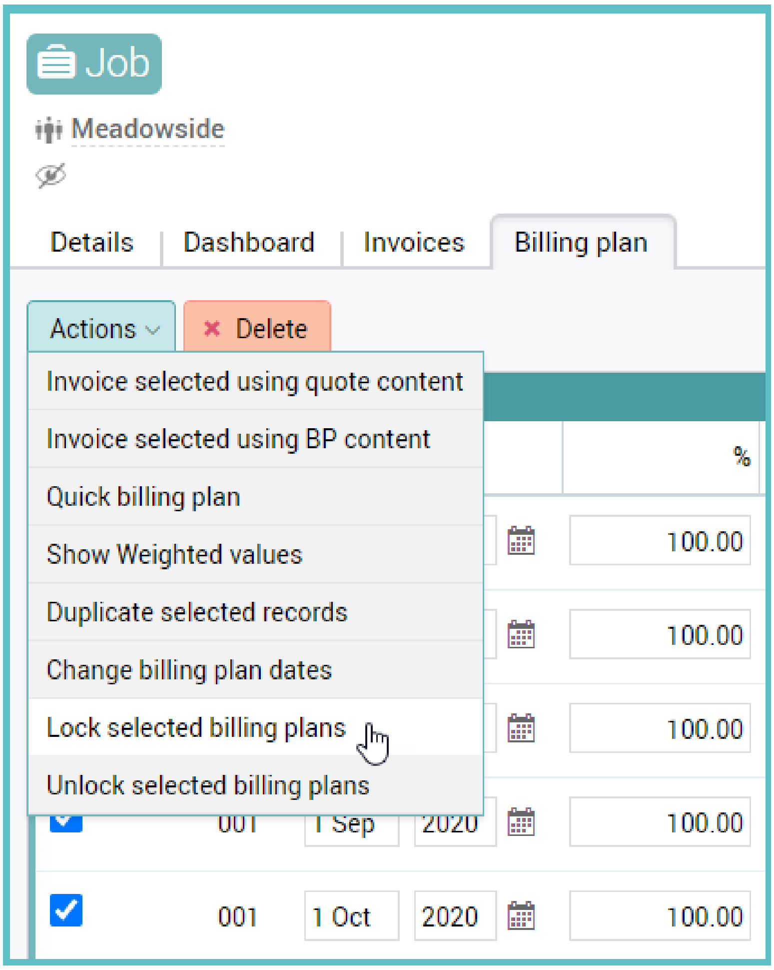


Multiple lock feature

Previously, billing plan items were locked/unlocked by clicking on the 'Edit' button and then ticking/unticking the 'Locked' tick box inside each individual record. This process has been enhanced, allowing single and multiple billing lines to be locked/unlocked using the 'Actions' button.

To use the lock/unlock multiple billing plans feature:

- Select the required billing plan lines
- Click on the 'Actions' button and choose either to lock or unlock the selected billing plans



Locked items in the Billing plan list display a padlock icon and cannot be edited.

To unlock items for editing:

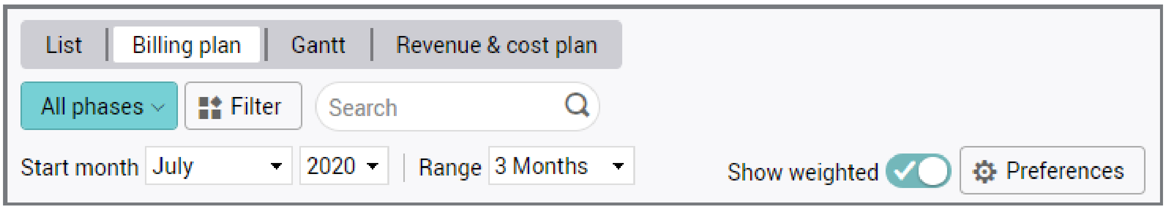
Use the 'Actions' button and select 'Unlock selected billing plans' or click on the 'Edit' button on each billing plan line to unlock from inside the record.

Phase billing plans added to the Job Phases tab

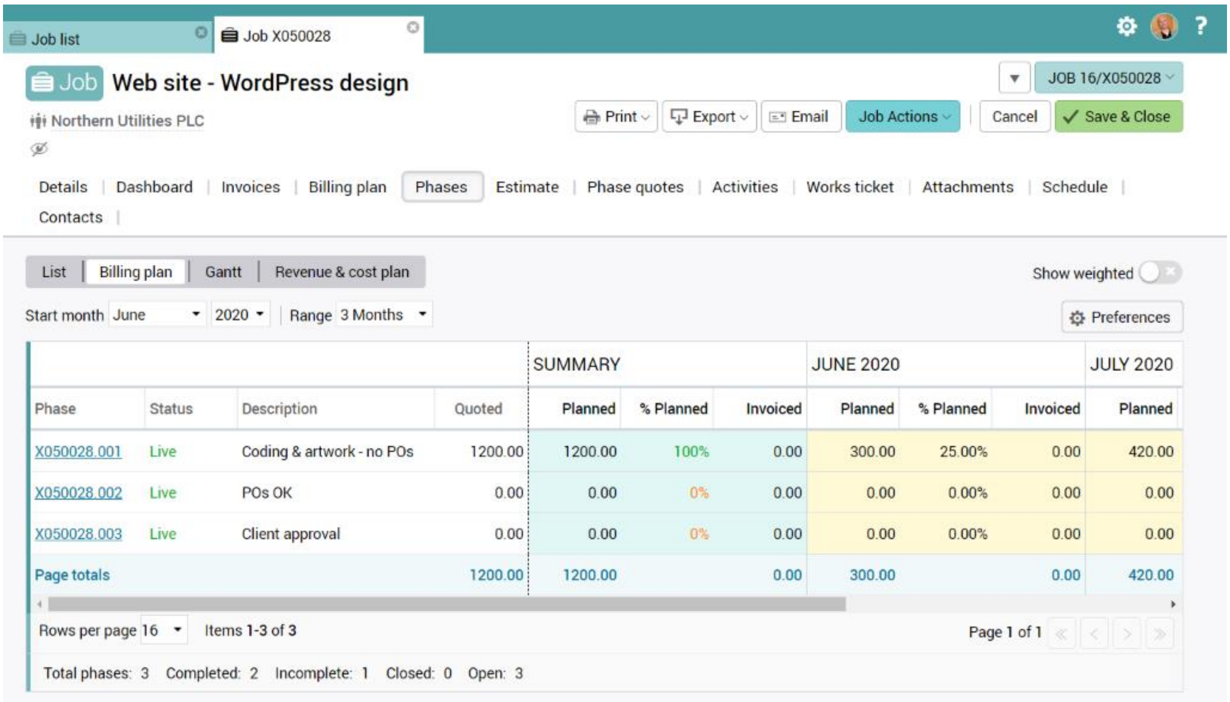
This feature enables the viewing of all billing plans across phases on a job.

The following helpful functions are located directly below the Billing plan button:

- Views
- Filter
- Search window
- Start month selector
- Start year selector
- Range selector
- Show weighted button
- Preferences



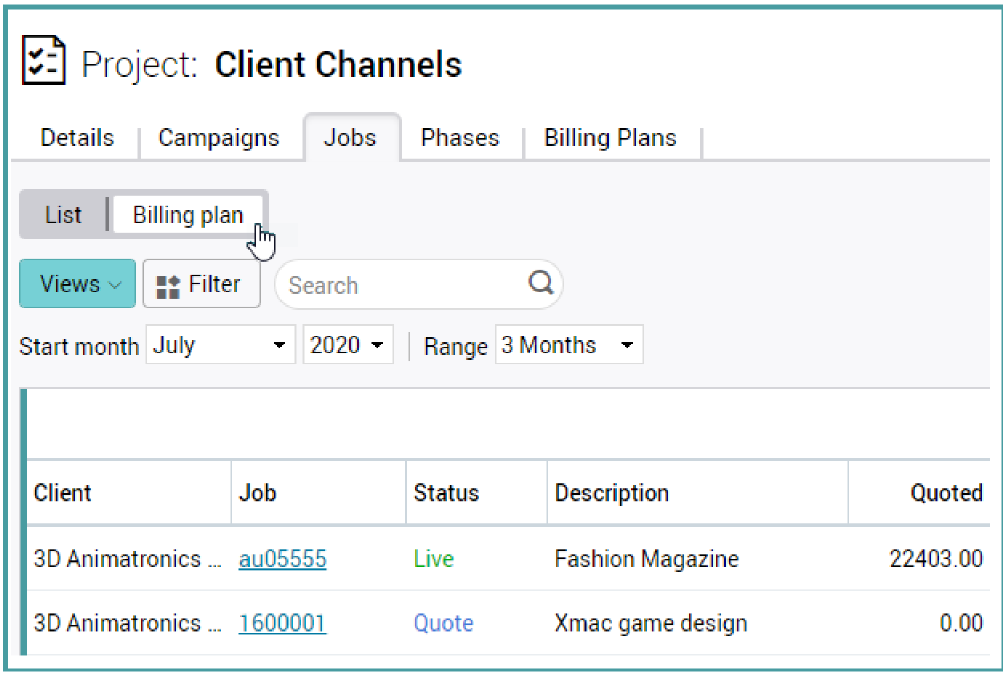
Example billing plan:



Multi-job billing plans – extended usage

The 'Billing plan' view button has been added to the following areas of Synergist:

- Client Contacts - 'Jobs' and 'Phases' tabs
- Projects - 'Jobs' and 'Phases' tabs
- Campaigns - 'Jobs' and 'Phases' tabs

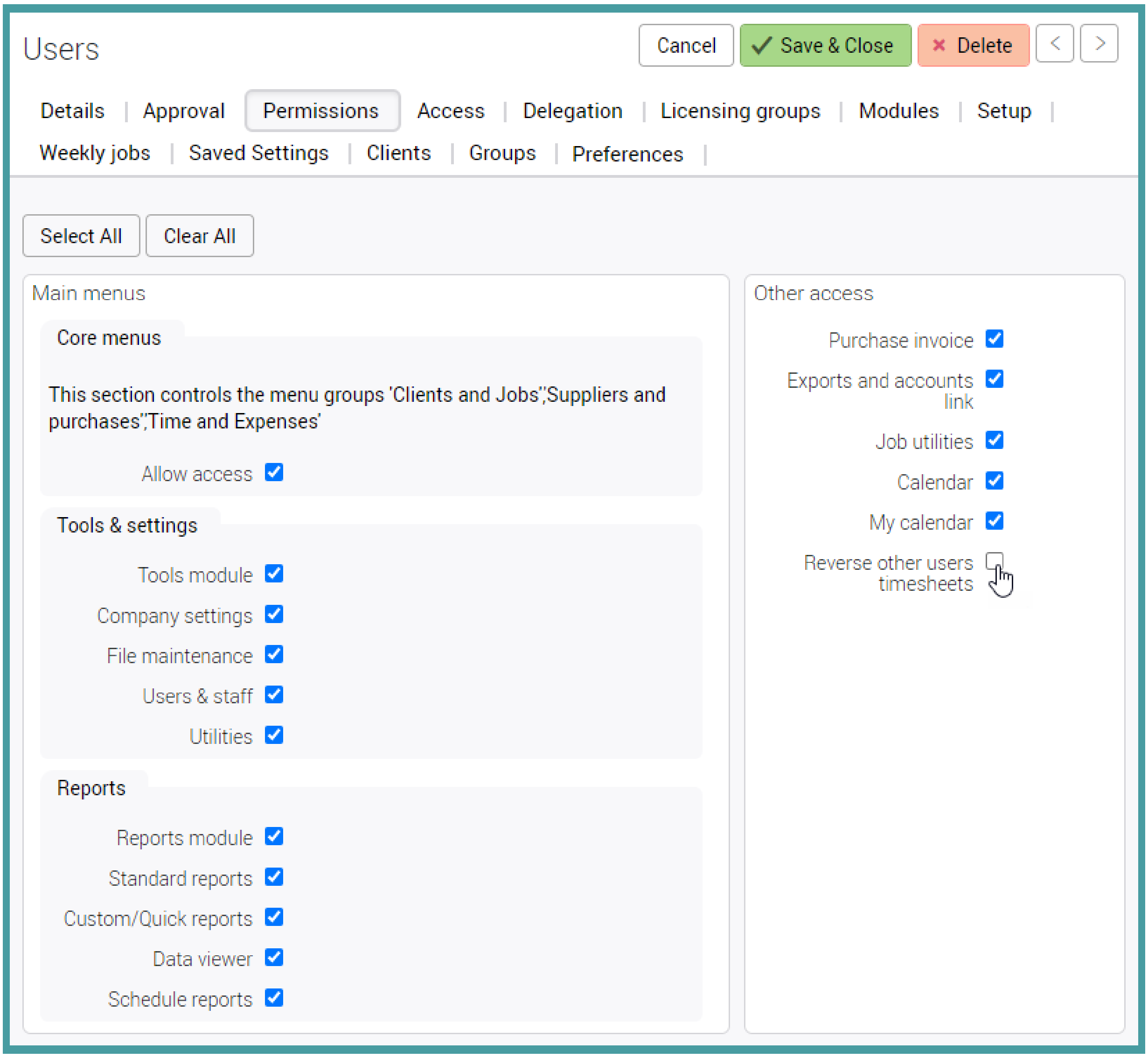


Timesheet reversal from posted timesheets permission

Previously a user could only reverse out their own timesheets. However, it is now possible to reverse out other user's timesheets too.

Note: Access rights are required to use this feature.

User permissions



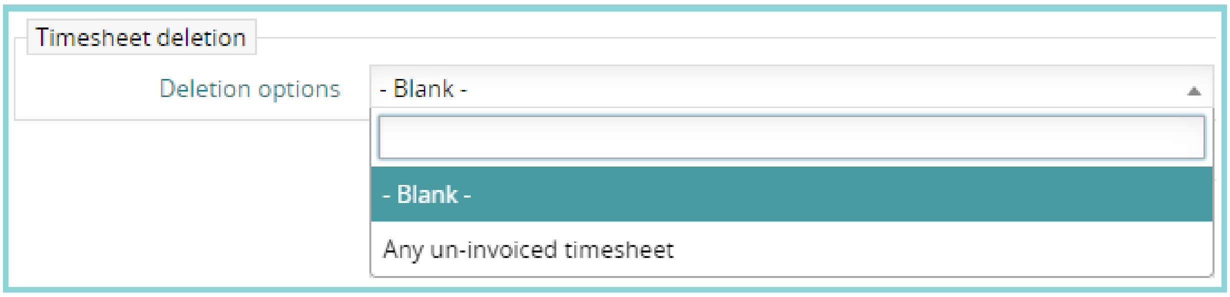
Option to delete timesheets

The 'Delete time sheets' feature allows users with relevant permission levels to delete timesheets. This feature may be used by organisations who do not require an audit trail or in situations to correct costs if a timesheet has been reversed after cost/charge rates have been updated.

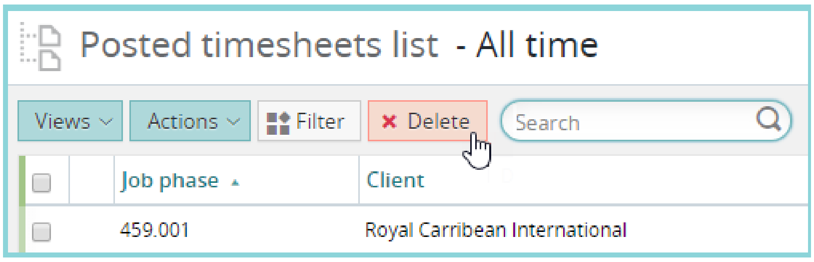
Permissions

To manage a user's 'Delete Timesheet' permissions:

- Navigate to 'Settings' and select 'File Maintenance'
- Click on 'Users' and open the required user record in the 'User List'
- Choose the 'Approval' tab
- Locate the 'Deletion options' drop-down menu in the 'Timesheets' panel



To delete a timesheet, use the 'Posted timesheets list':



Restrictions

The following restrictions apply when deleting timesheets:

- Only un-invoiced timesheets may be deleted
- Timesheets that are attached to a draft or real invoice may not be deleted
- Timesheets that belong to a closed phase may not be deleted

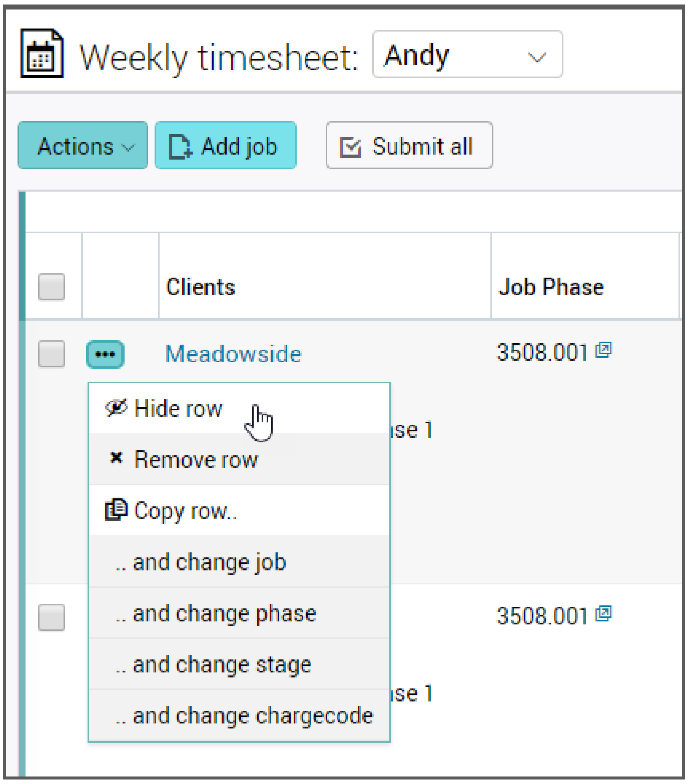
WEEKLY TIMESHEET

Hide individual rows

Weekly timesheets often have multiple rows for holidays, admin, marketing, sickness, meetings etc. These extra rows are not needed most weeks and make the list very long.

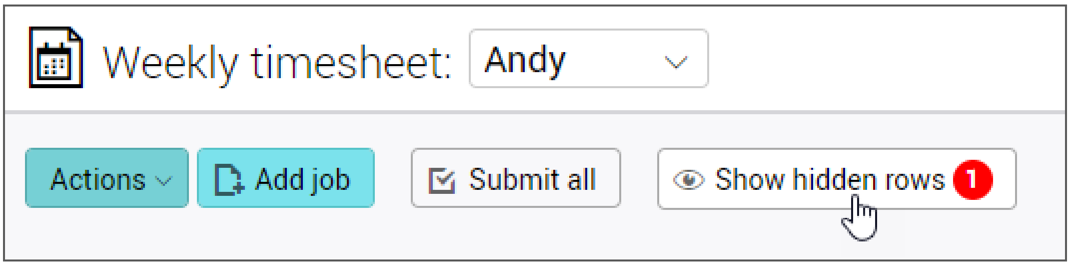
To hide a weekly timesheet row:

- Identify which weekly timesheet row to hide
- Click on the row menu icon  to reveal a drop-down menu
- Select the 'Hide row' option



Note:

- To keep column totals correct, only rows containing no data/time values for that week can be hidden
- When one or more weekly timesheet rows are hidden, a 'Show hidden rows' button appears along the top of the screen, indicating the total number of rows hidden
- Click on the 'Show hidden rows' button to reveal all hidden weekly timesheet rows

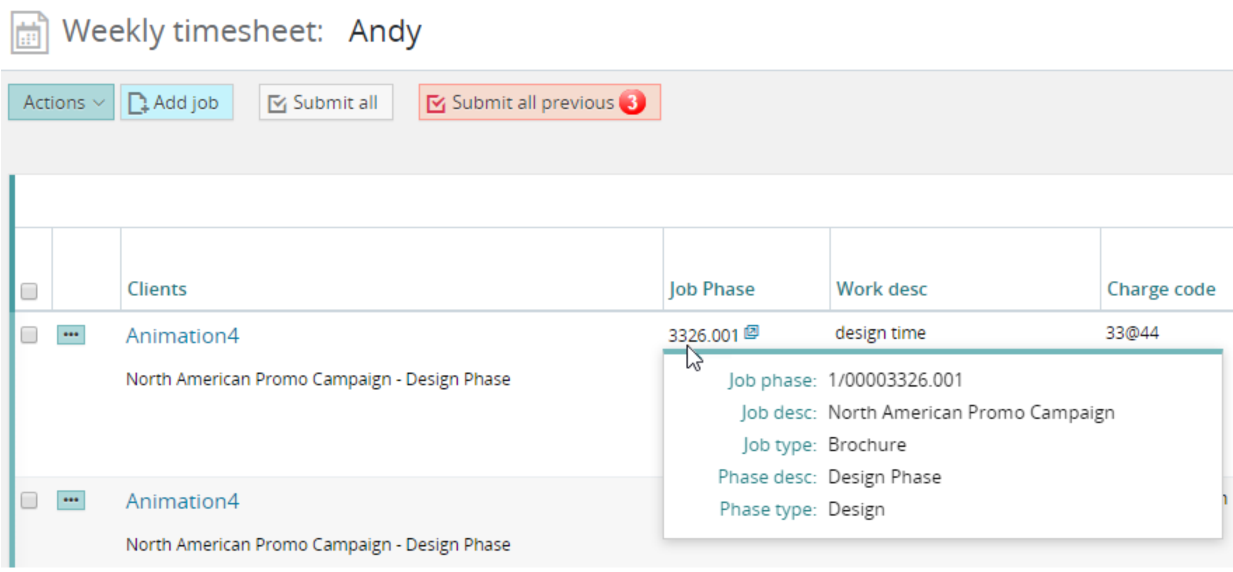


Phase type in hover

In Weekly timesheets, move the cursor over items in the 'Job Phase' column to view information regarding:

- Job phase
- Job description
- Job type
- Phase description
- Phase type

'Phase type' is a new addition to the information displayed.

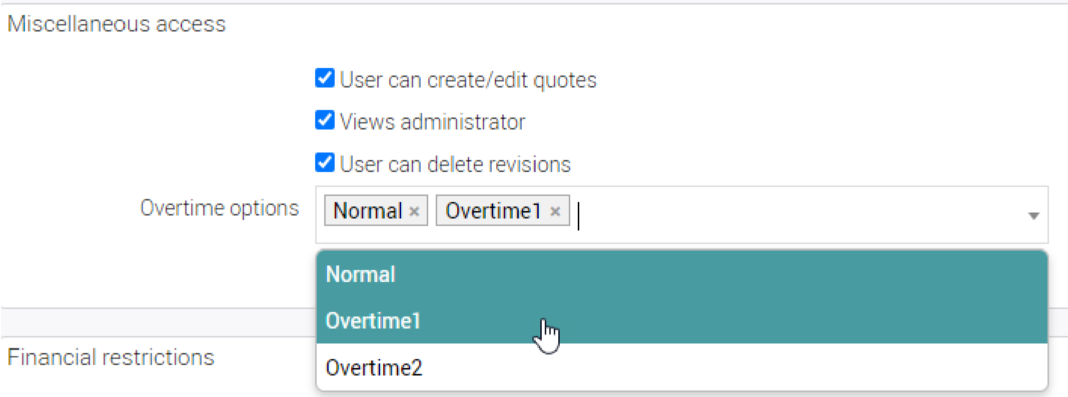


Option to set overtime options per user

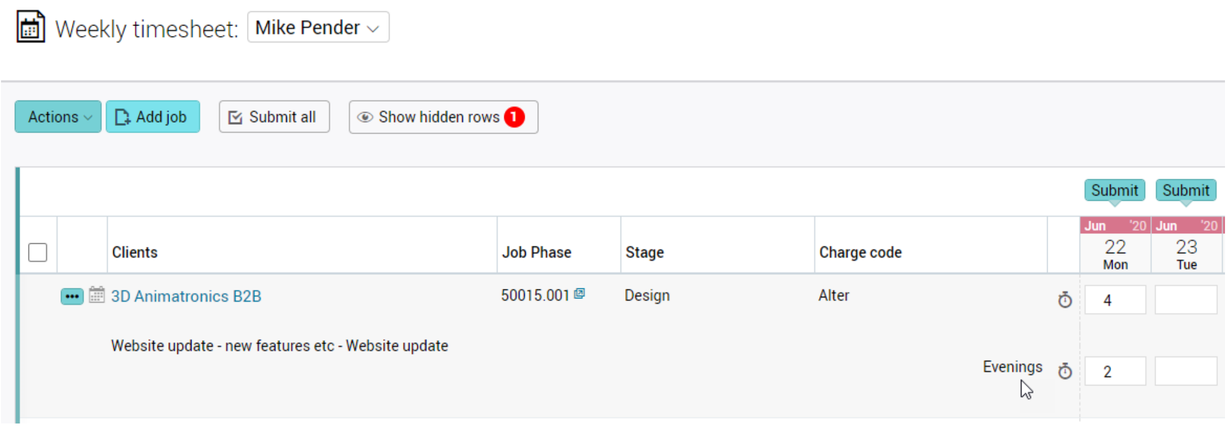
The 'Overtime options' feature allows administrators to independently enable / disable the presence of overtime fields on different user's timesheets.

To access this feature:

- Select the 'Access' tab on user settings
- Scroll down to locate 'Overtime options' on the left side of the screen



Example of a weekly timesheet only showing 'Overtime1'

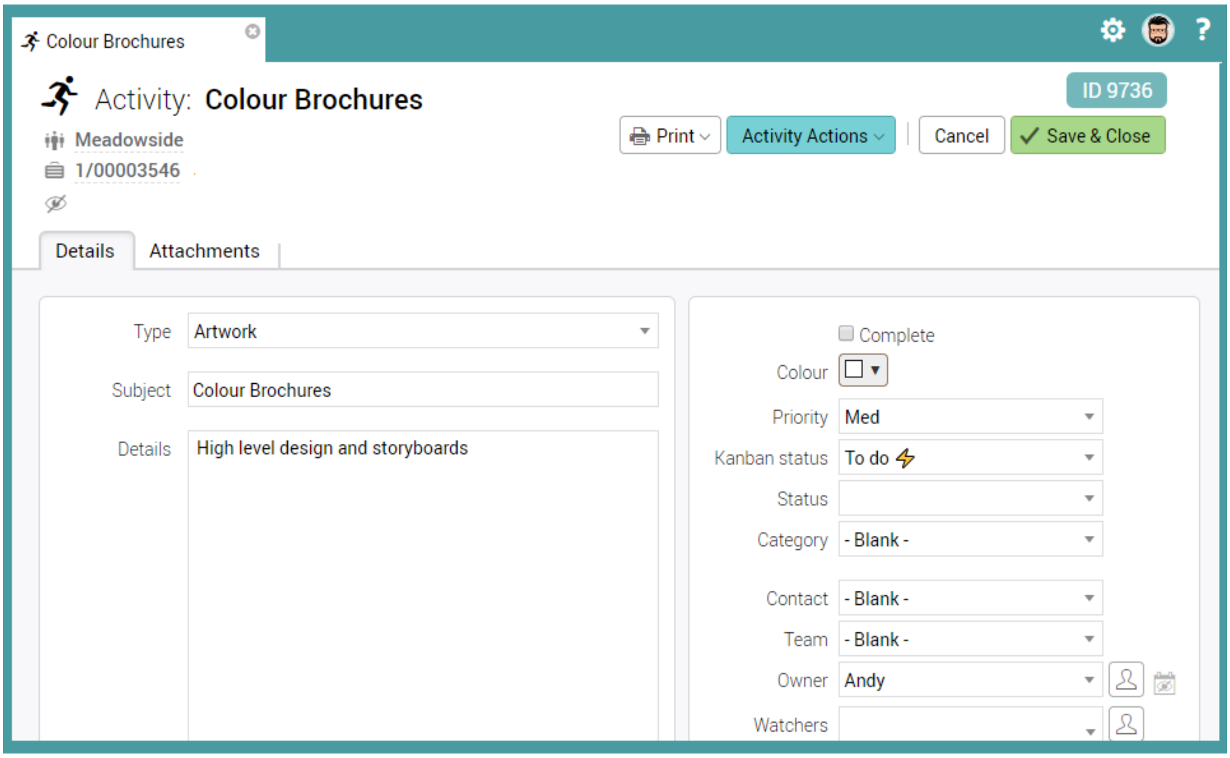


Note: Overtime1 & Overtime2 may have been renamed in company settings. In this example, Overtime1 is labelled as 'Evenings'.

ACTIVITIES

Activity heading - activity ID

On an activity heading, the activity number has moved to the right-hand side of the screen. In the following example, the activity booking is ID 9736 .



synergist

Emojis – use in text fields

Windows 10

To access the Windows emoji keyboard:

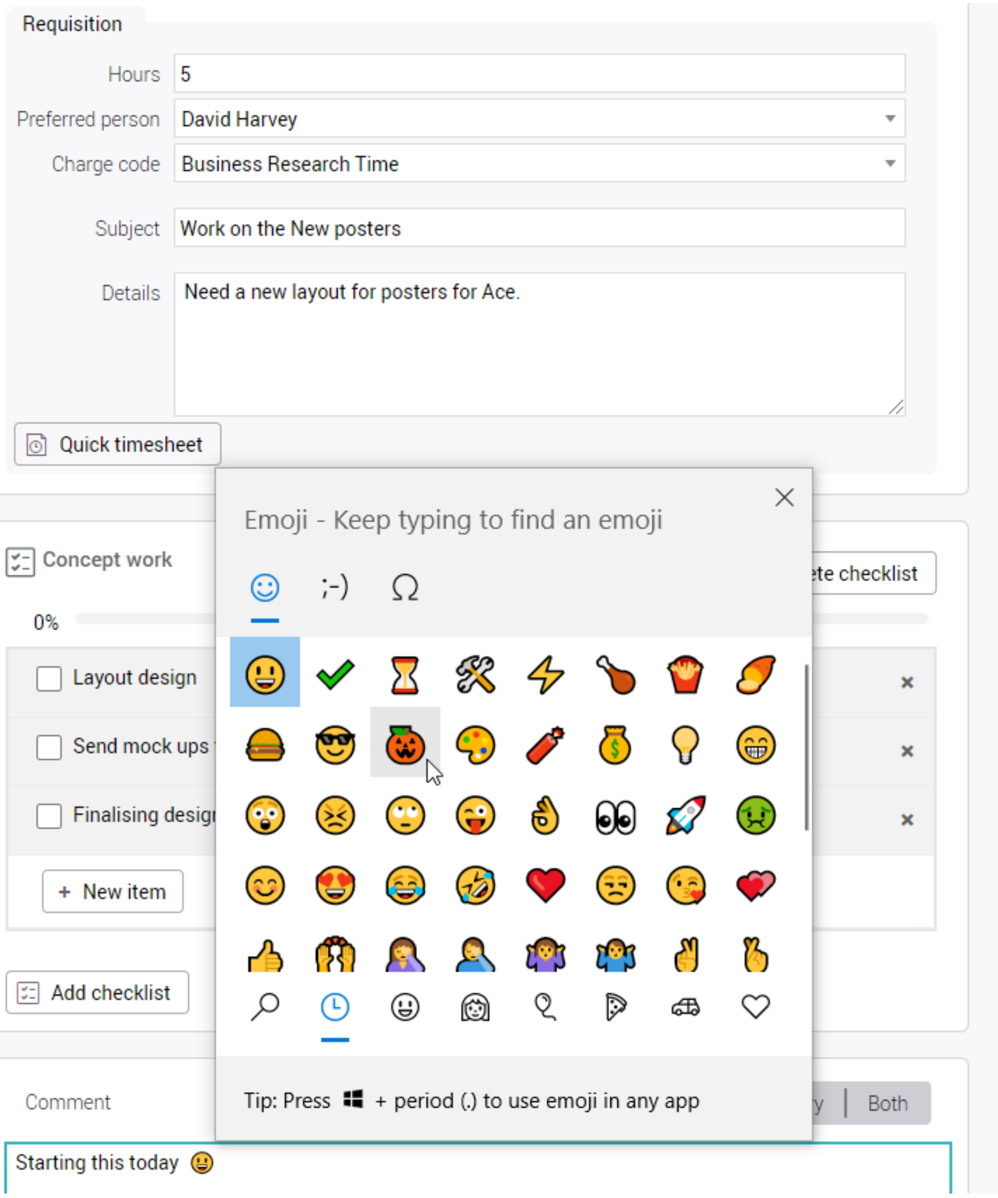
- Click the text field in which to insert the emoji
- Press Windows Key +. (full stop / 'period')

Mac OS

MacOS also provides an emoji keyboard. To access:

- Click the text field in which to insert the emoji
- Press Command-Control-Spacebar .. or if a Touch Bar is available, hit the Emoji icon there.

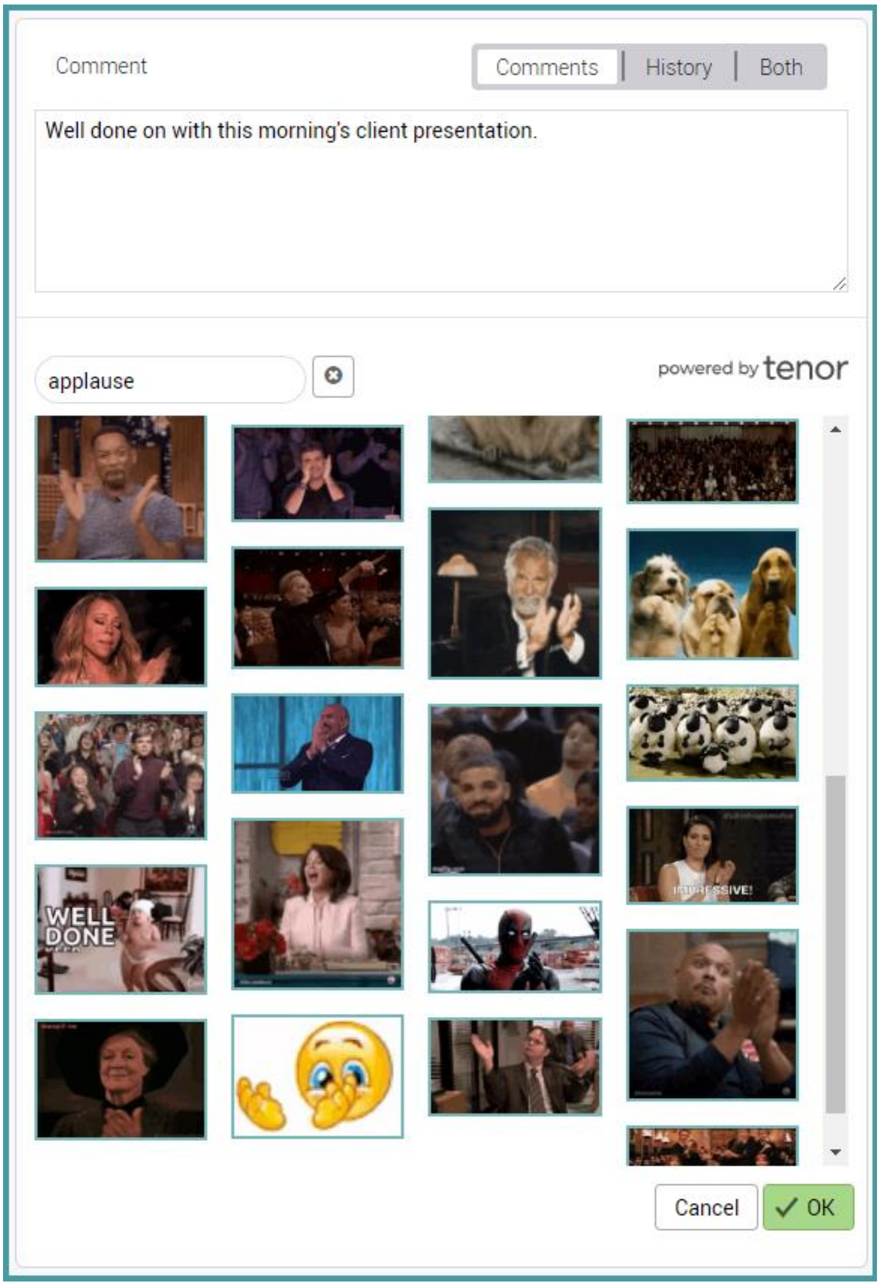
Example - adding a comment in a Requisition:



Tenor GIFs integrated into activity commenting

To use animated GIFs on 'Comments' in the 'Activities' section:

- Open an activity
- Scroll to the bottom of the screen
- Press the 'Add Comment' button
- Click in the 'Add a GIF' window and type in a keyword to search for an animated GIF
- Click 'OK' to attach the GIF



Note: Tenor is an online animated GIF search engine and database. To find out more about Tenor, please visit https://tenor.com/

Batch processing on Activity tabs

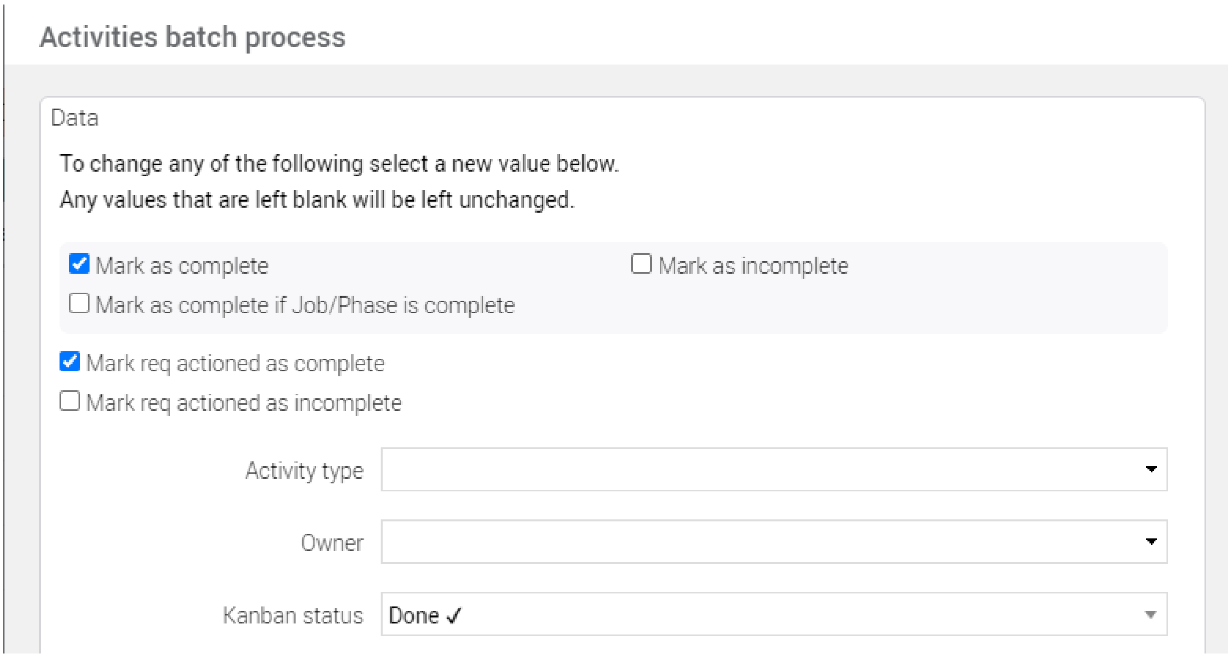
Batch processing appears on all 'Activity' tabs in the following areas:

- Client card
- Client contacts
- Job card
- Phase card
- Stages

This feature is particularly useful if working within a job and there is a need to move several activities or requisitions from one Kanban stage to another. Instead of dragging and dropping each item individually, the batch processing feature can be used

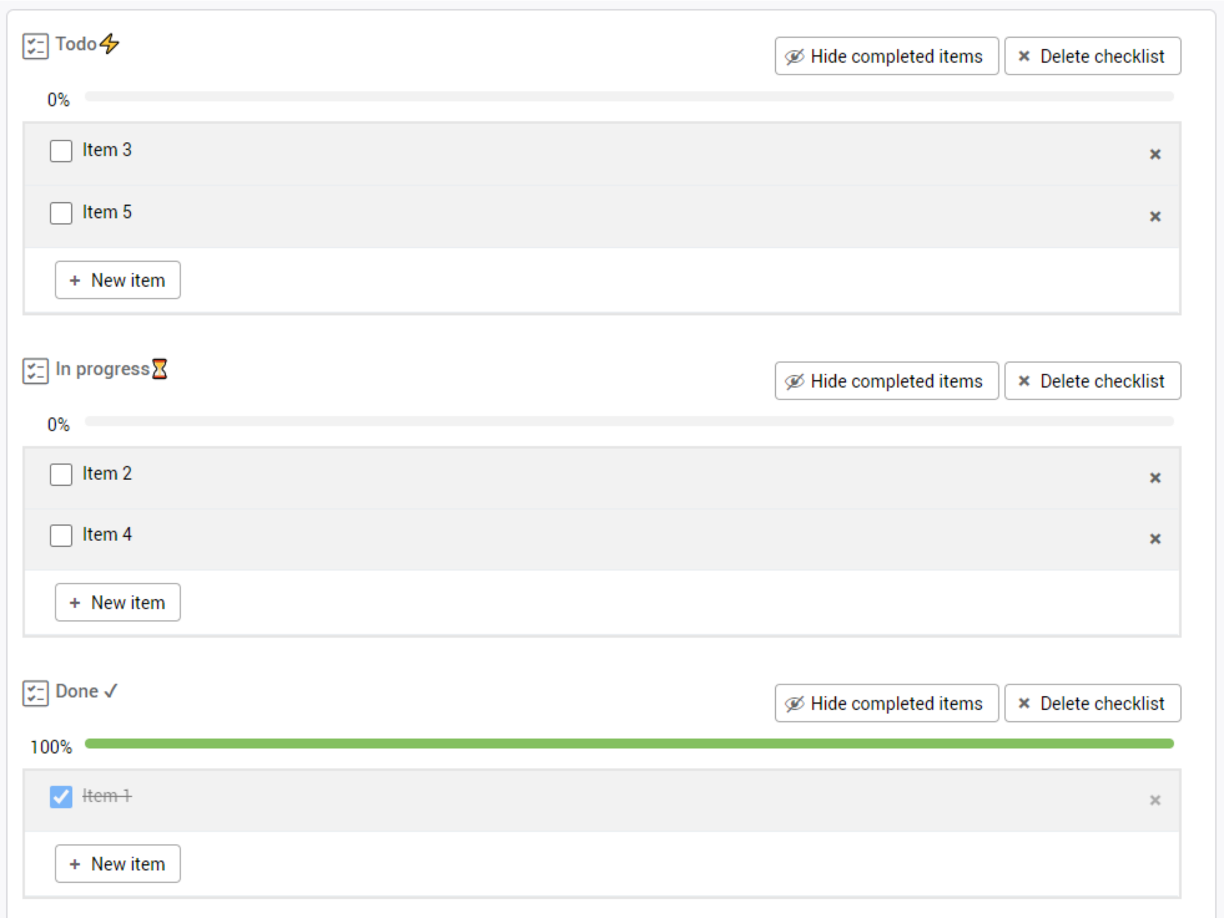
Each 'Activity' tab has an 'Actions' button containing the 'Batch update' function:

Example of moving activities to the 'Done' Kanban stage:



Moving items between checklists

On an activity with multiple checklists, items can be dragged from one checklist into another. This can be useful if arranging checklists with multiple stages – similar to a Kanban board.

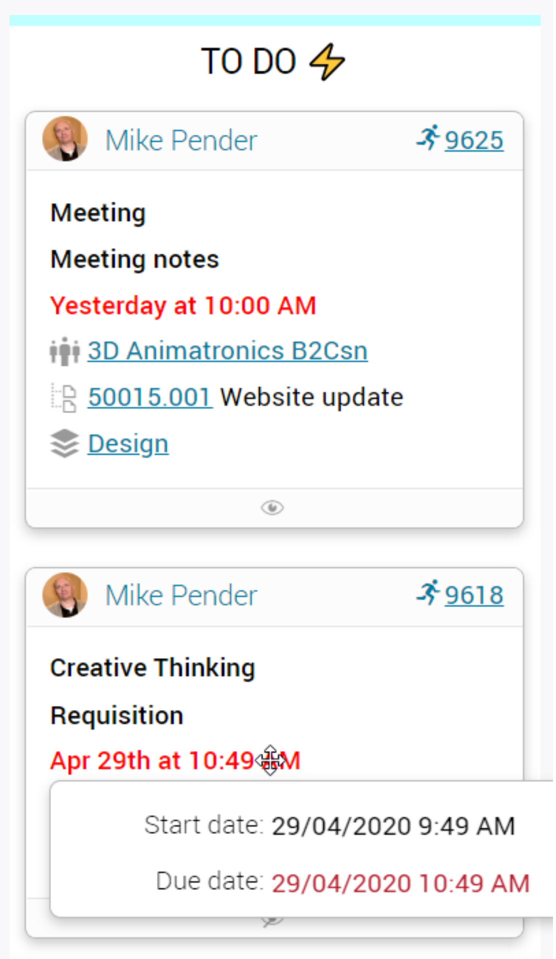


KANBAN BOARDS

Friendly date format on Kanban cards

Synergist Kanban cards have adopted a friendly date format. Only the due date is displayed, and the text is in red if it is overdue. When appropriate, words like 'Yesterday' and 'Tomorrow' are used instead of dates. The full date is available on the hover, along with the start date.

Example:



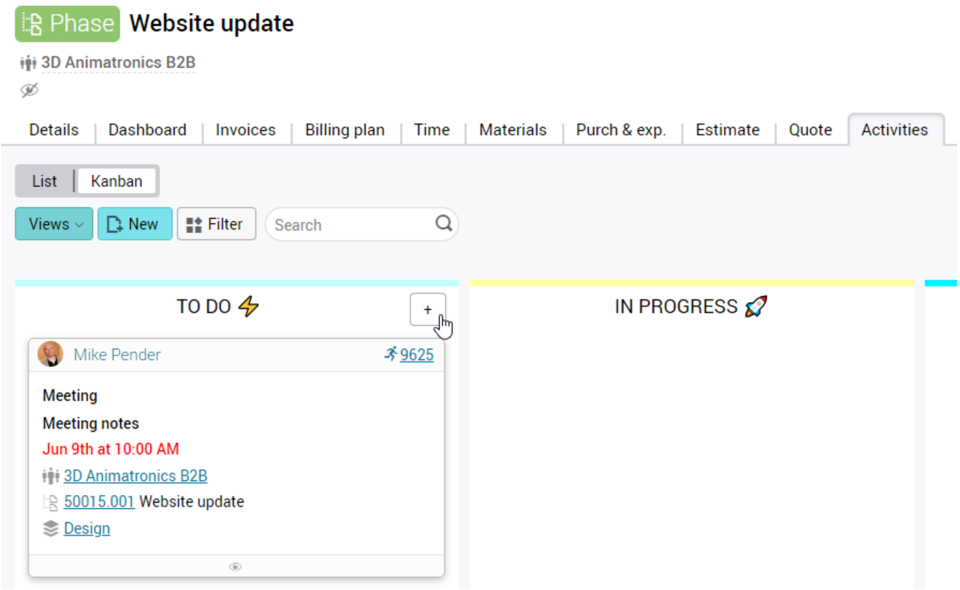
Creating an activity via the Kanban board

It is now possible to create an activity, typically a requisition, from within a Kanban board. This feature is available at Client, Job, Phase and Stage levels.

Note: This feature is not available on the consolidated Kanban board accessed from the main menu.

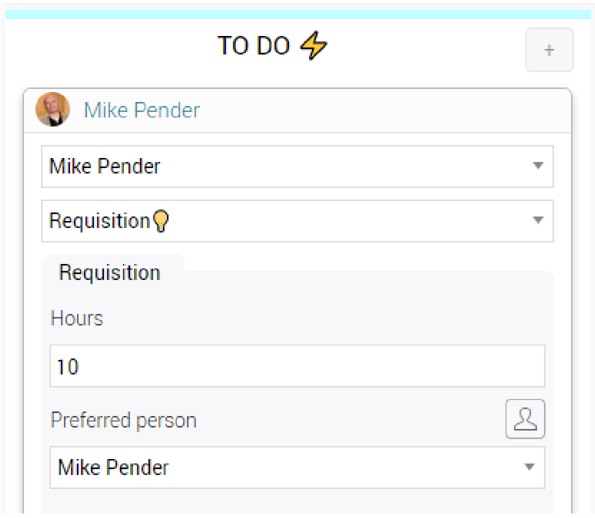
Adding an activity:

Click the '+' icon to add an activity.



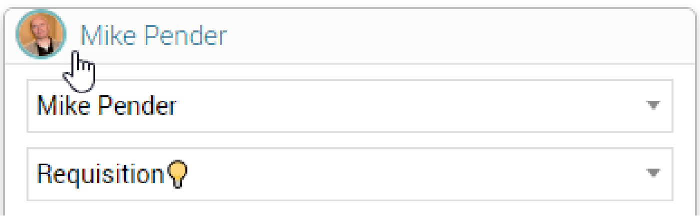
Creating a requisition:

Clicking the '+' icon opens an input form within the Kanban card. To create a requisition, select 'Requisition' from the initial drop-down list.



Changing the default owner

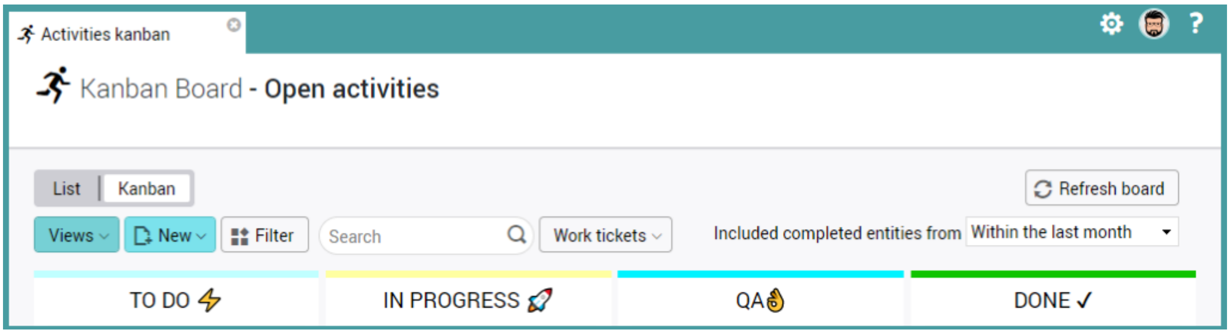
Clicking the avatar at the top of the new card changes the owner.



Kanban filter

Kanban lists can now be filtered using the new 'Filter' button. Previously only the 'Views' option could be used to pre-filter the Kanban list.

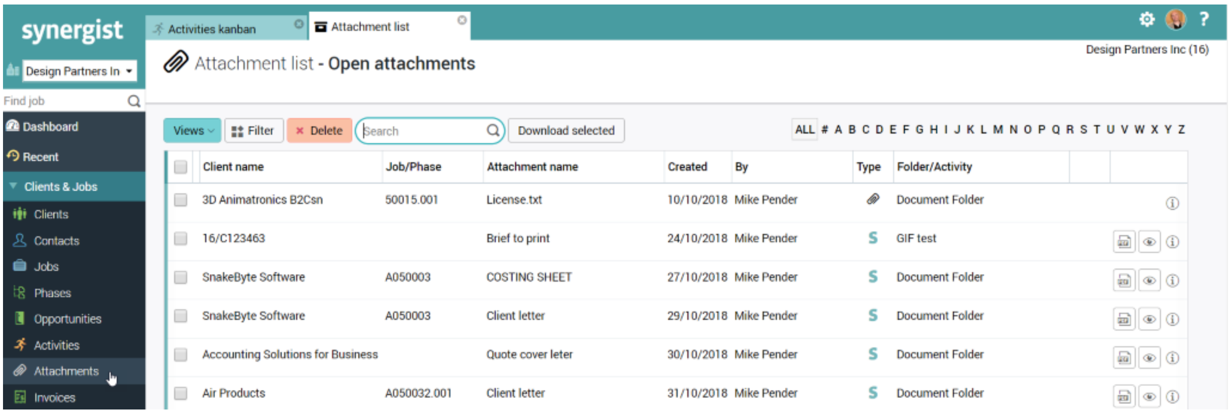
Example:



DOCUMENTS & ATTACHMENTS

Attachments in the main menu

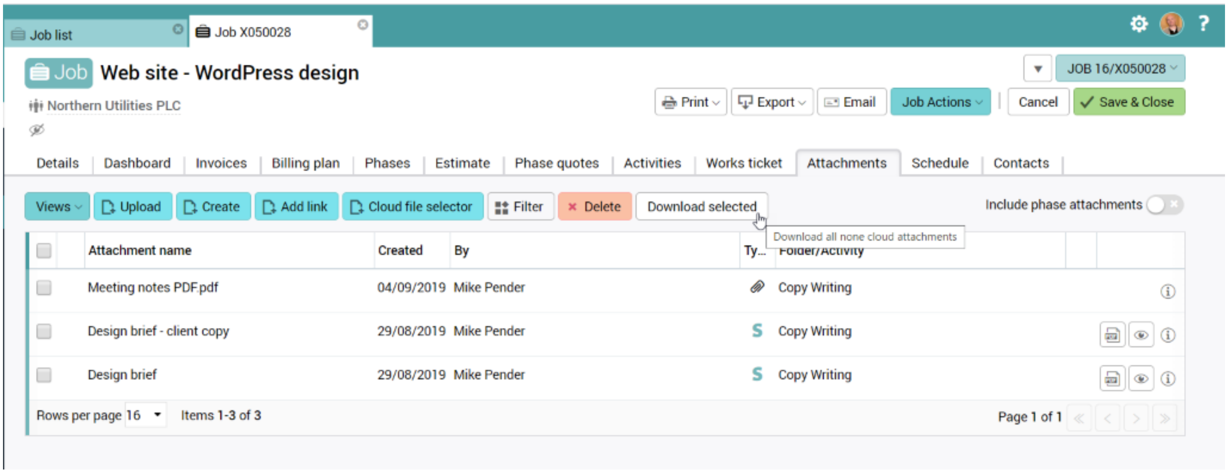
Attachments can now be listed from the main menu – enabling the user to search for attachments across all clients and jobs.



Download selected attachments

A 'Download selected' button has been added to all 'Attachments' tabs.

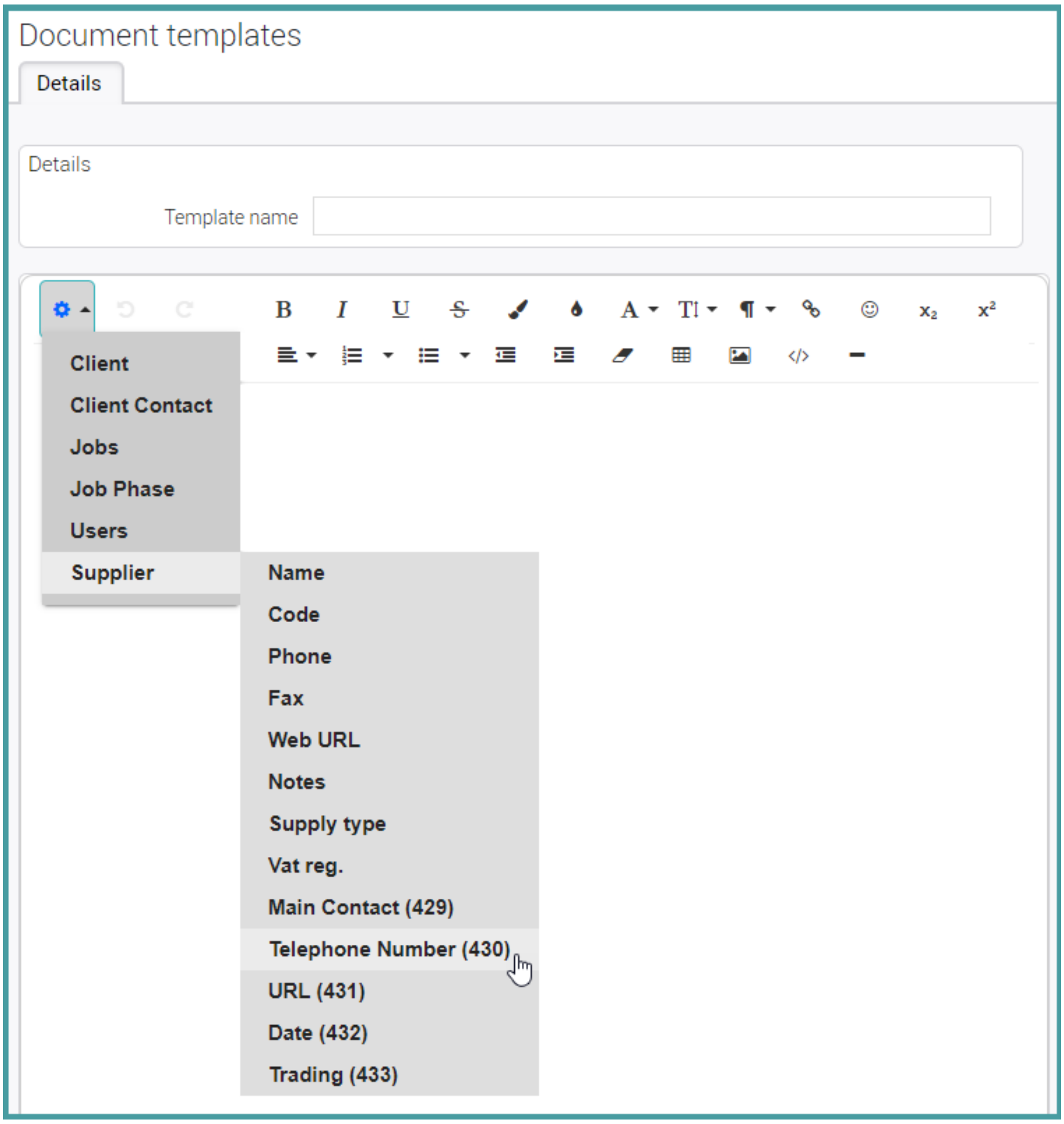
Example from a job card:



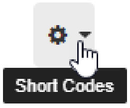
Note: To ensure system stability, a maximum number of 10 attachments may be downloaded at any one time.

Custom fields in Synergist (HTML) Documents

When a document is created from an attachments tab in Synergist, it can be based on a template. These templates can be set up to include special fields such as 'Contact name' or 'Job number'. Synergist now supports Custom fields in document templates.



To insert a custom field into a 'Document template':

- Navigate to 'Settings' and select 'File maintenance'
- Locate the 'Miscellaneous' panel and choose 'Document templates'
- Click on the 'New' button towards the top left of the screen
- Press the 

icon towards the top-left hand corner of the screen to reveal the drop-down menu
- Custom fields are identifiable by the presence of their Field ID number in brackets
- Click on the custom field to insert it into the template

Additional fields available

Job contact full name

Xero – Purchase invoice attachments

Purchase invoice attachments can now be uploaded to Xero as part of the purchase invoice batch posting process.

QuickBooks online

Synergist can link to QuickBooks online via its API. For further information on setting this up, please contact our support desk:

Telephone: +44 1625 577 918
Email: support@synergist.co.uk

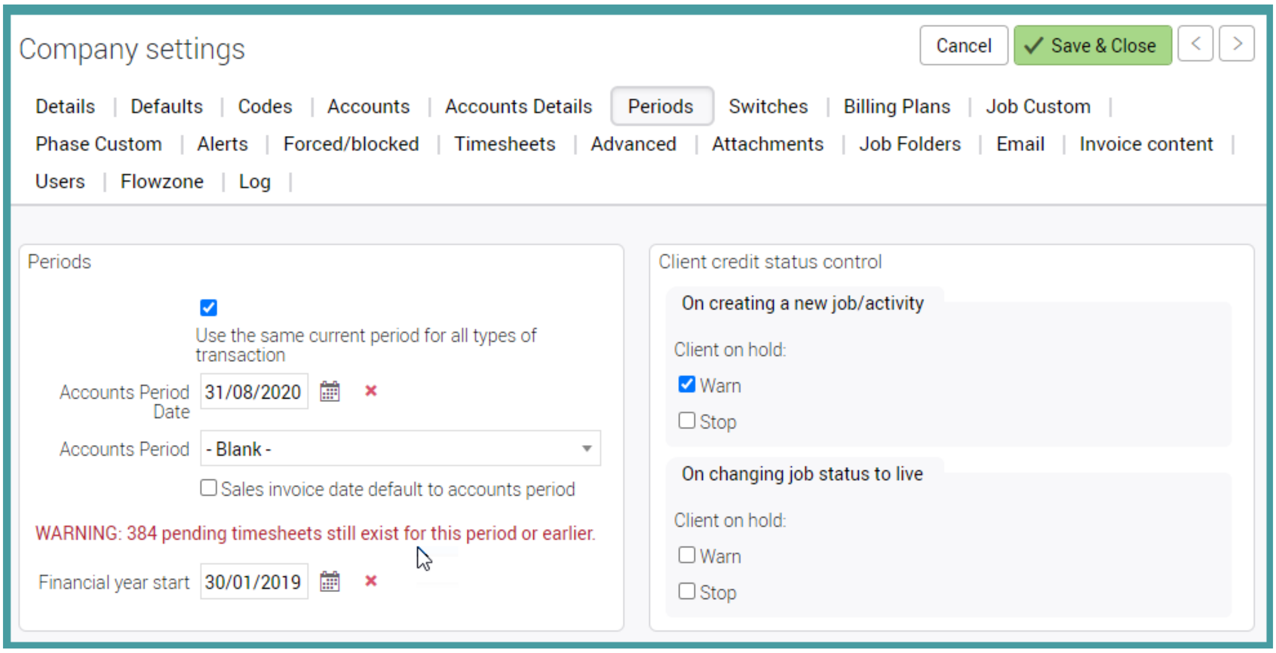
Time posted to closed period

A warning displays on the 'Periods' tab within 'Company settings' notifying users of any pending records in the current period. If there are no pending records, no warning is displayed.

In the example below, the message reads:

WARNING: 384 pending timesheets still exist for this period or earlier.

Note: This is only a warning and Synergist still allows users to change the period. It is good practice to process any pending timesheets before moving the period forward.

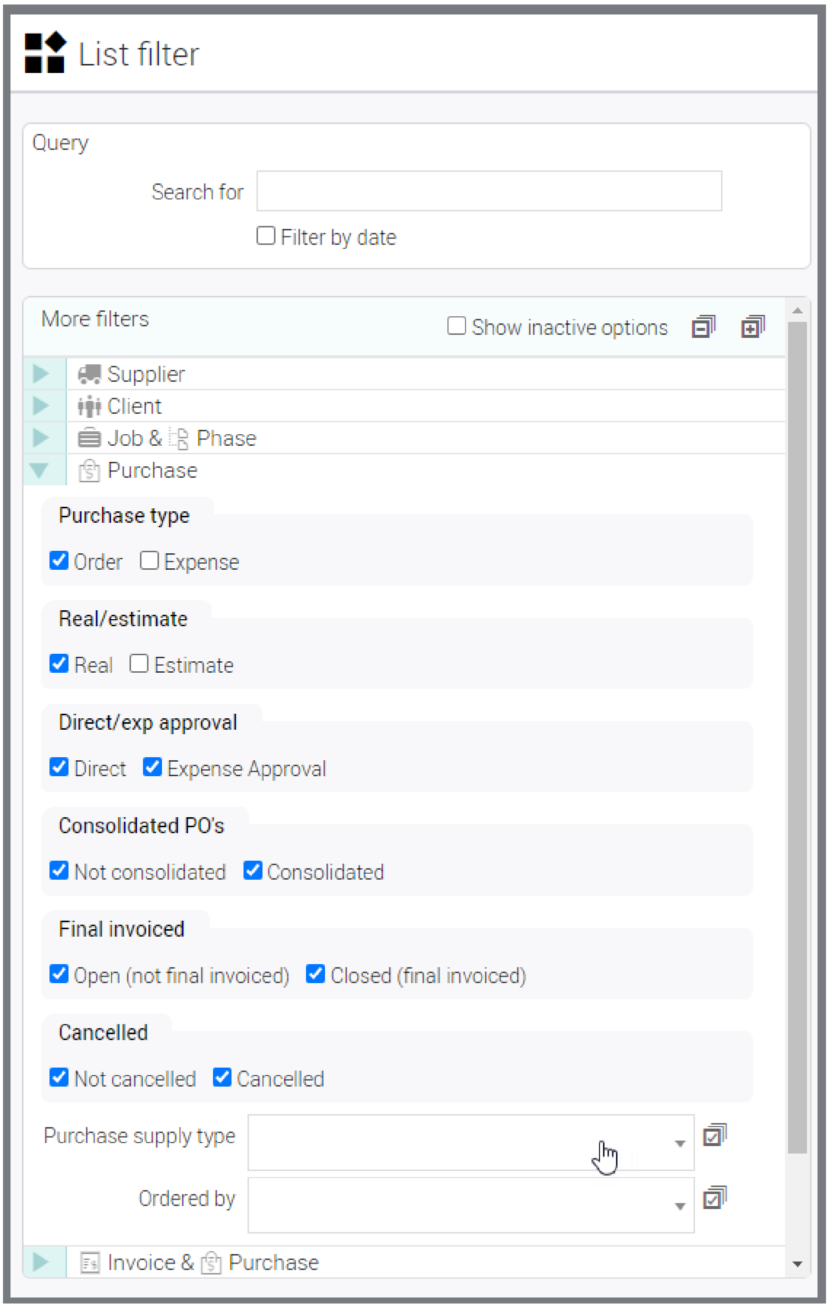


PURCHASING

Purchase order filter

'Purchase supply type' added

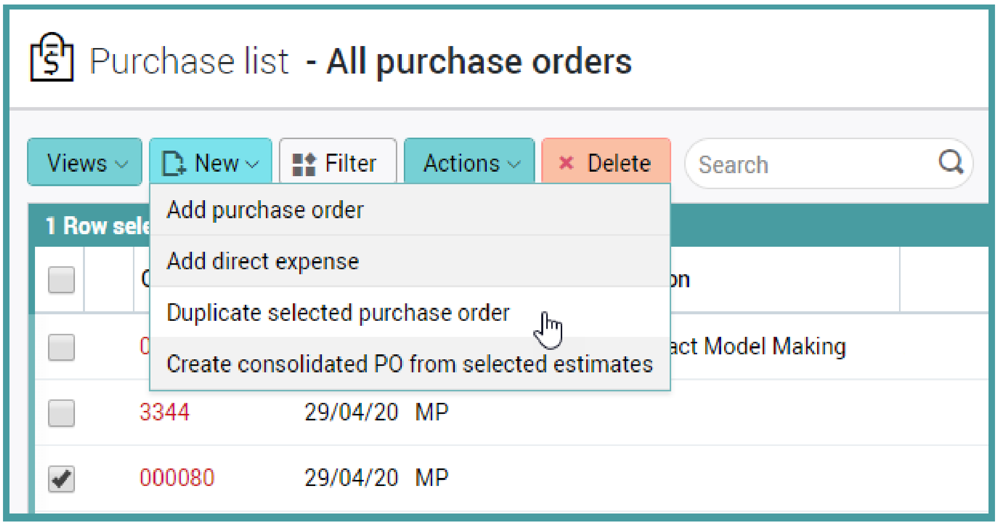
Using this filter makes it possible to create special views based on supply type:



Copying/duplicating a Purchase Order

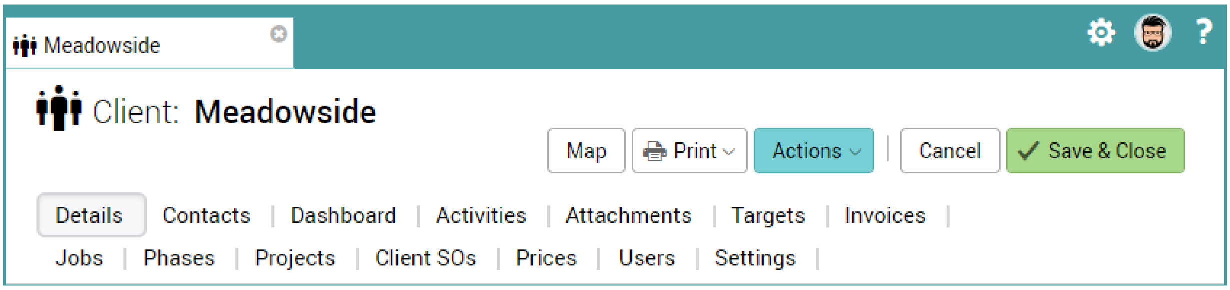
To copy/duplicate a purchase order:

- Select 'Purchase orders' in the main menu
- Tick the box for one purchase order in the Purchase list
- Click on the 'New' button and choose 'Duplicate selected purchase order'



- Select a phase in the phase picker window
- Enter 'Own PO number' or tick 'Use next sequential PO number'
- Click on the 'Duplicate' button

Improvements to the 'Client' card



A new 'Dashboard' tab

See below (Dashboard tab added to client & prospect records) for details of the new charts added to this tab

'Projects' tab

The 'Projects' and 'Campaigns' tabs have been combined into one tab

'Financial' tab

The 'Financial' tab has been renamed to 'Settings' and moved to the end of the tabs list

'Invoice content' tab

The 'Invoice content' tab has been removed and its contents transferred inside the 'Settings' tab

'Notes' tab

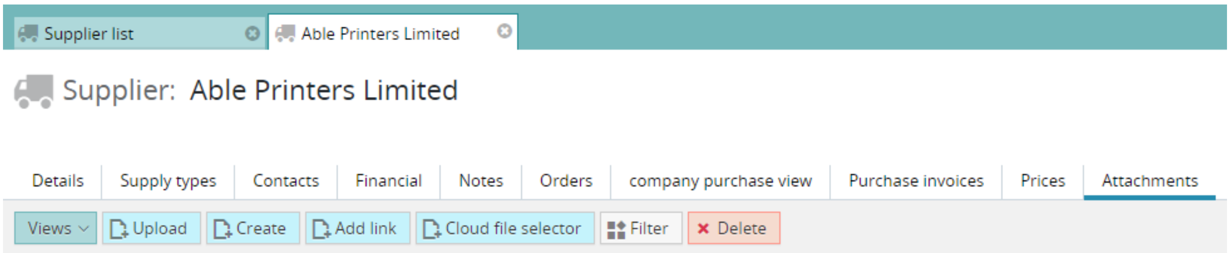
The 'Notes' tab has been removed. The 'Notes' panel, containing the 'Client specification' and 'Notes' boxes, has been moved to the bottom of the 'Details' tab.

'Linked organizations' button

The 'Linked organizations' button has been moved inside the 'Settings' tab.

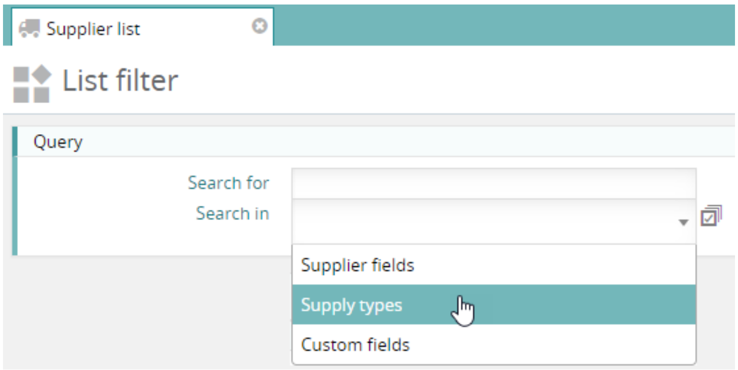
'Create' button added to Supplier Attachments tab

The 'Create' button enables users to produce Synergist HTML documents in the supplier area.



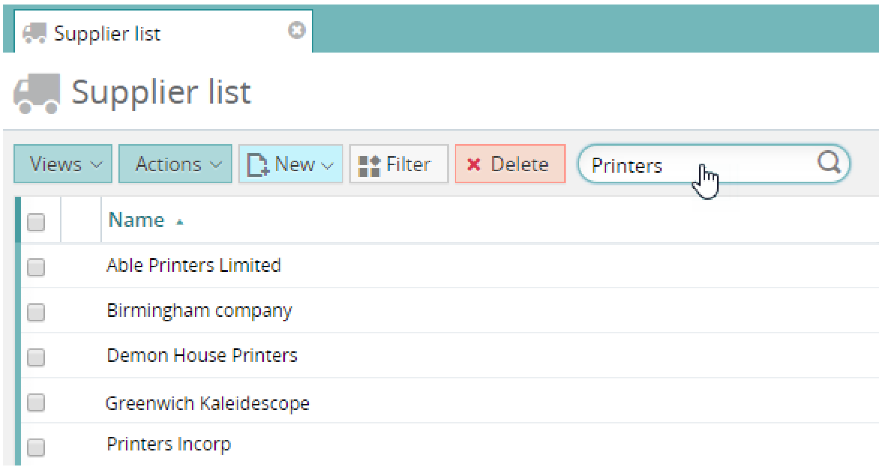
Search suppliers by supply type

To help search for suppliers of a specific supply type, an extra item has been added to the Supplier list > List filter > 'Search in' drop-down list.



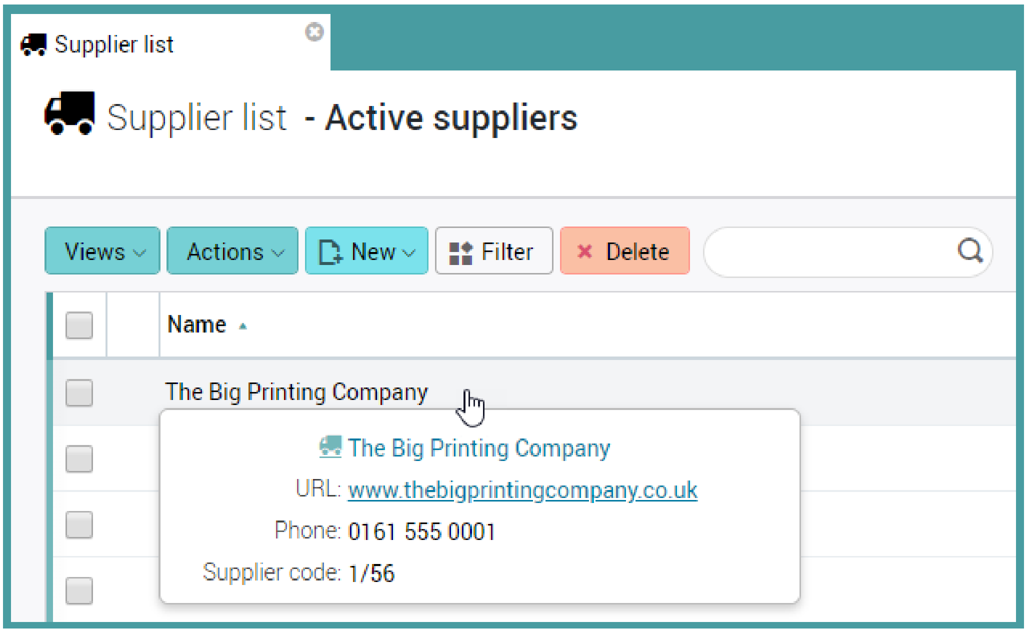
Once you have included 'Supply types' in the search filter criteria, you can now search based on supply type.

Example:



Supplier list

- The addition of a 'Type' column that differentiates entries in the list by 'Expense', 'Prospect' or 'Supplier'.
- Hover text added for ease of use



Dashboard tab added to 'Client' and 'Prospect' records

Dashboards present various key pieces of financial information in easy to read charts and tables. A new dashboard tab has been added to the client record.

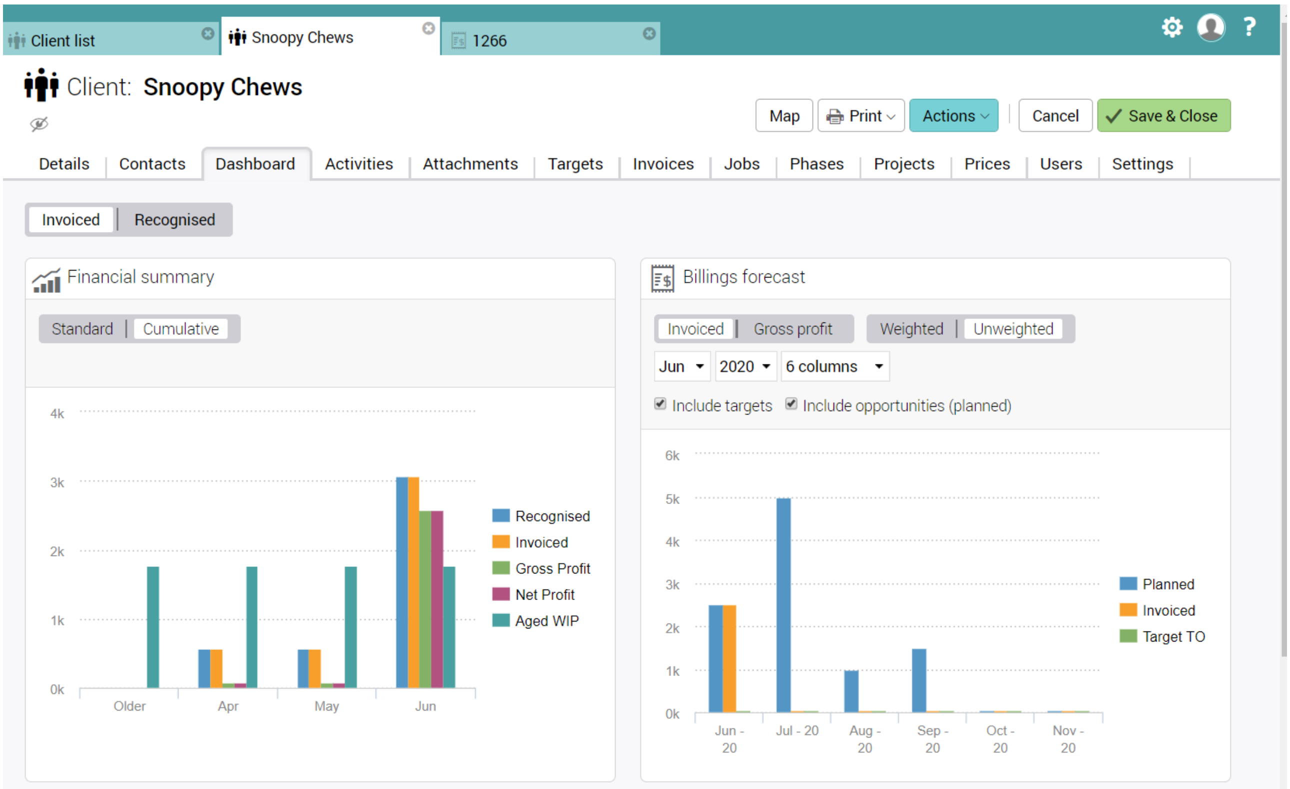
The Client Dashboard contains two tables of information:

'Financial summary'

The table can be filtered using 'Standard' or 'Cumulative' options

'Billings forecast'

- The table can be filtered using:
- 'Recognised' or 'Gross profit' options
- 'Weighted' or 'Unweighted' options
- Date
- Number of columns
- Included targets
- Included opportunities



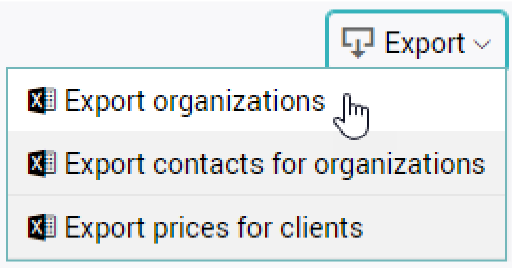
Note: On a client record, both the 'Financial summary' and 'Billings forecast' tables are present. On a prospect record, only the 'Billings forecast' table is present.

Client export - web URL and notes

The following fields have been added to the exported list of active clients, prospects and leads:

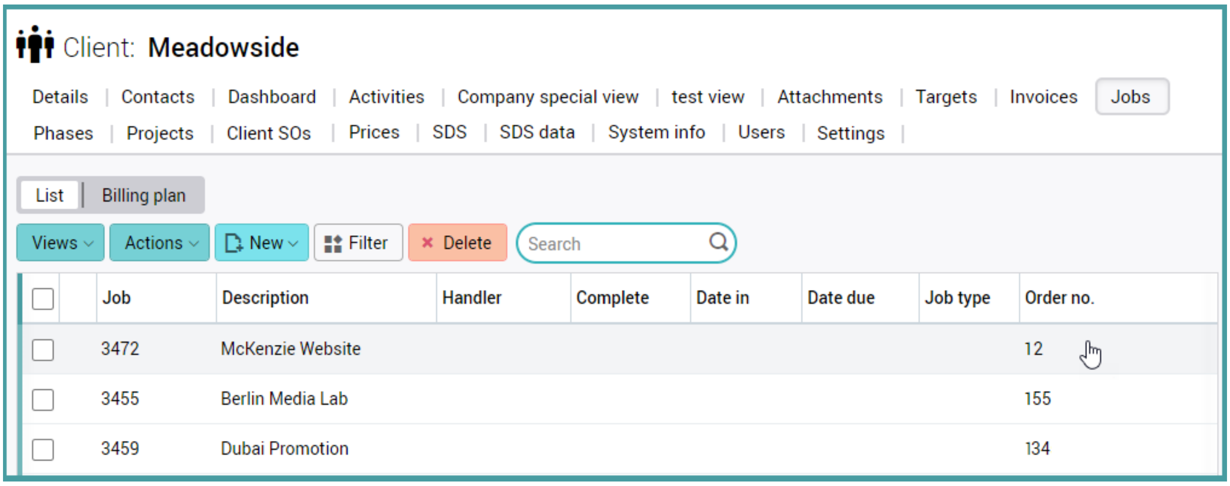
- Web URL
- Sales Info/Notes

Example: Export from the 'Client list'



'Order no.' column added to the 'Jobs' tab on a client record

An additional column labelled 'Order no.' has been added to the 'Jobs' tab on a client record.



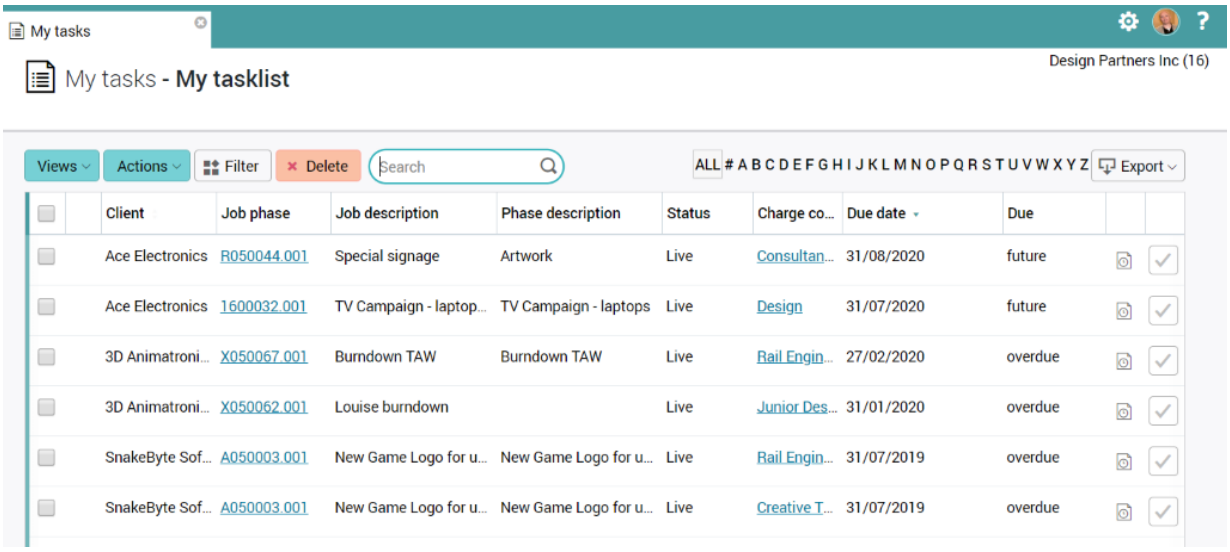
MY TASKS

The ‘My tasks’ module can be used to manage the allocation of estimates assigned to the current user in the form of a list. Items are marked as completed by clicking the tick icon on the right-hand side of the list. ‘My tasks’ has also been enhanced to support ‘Views’ and ‘Batch updating’.

Enhancements to My Tasks

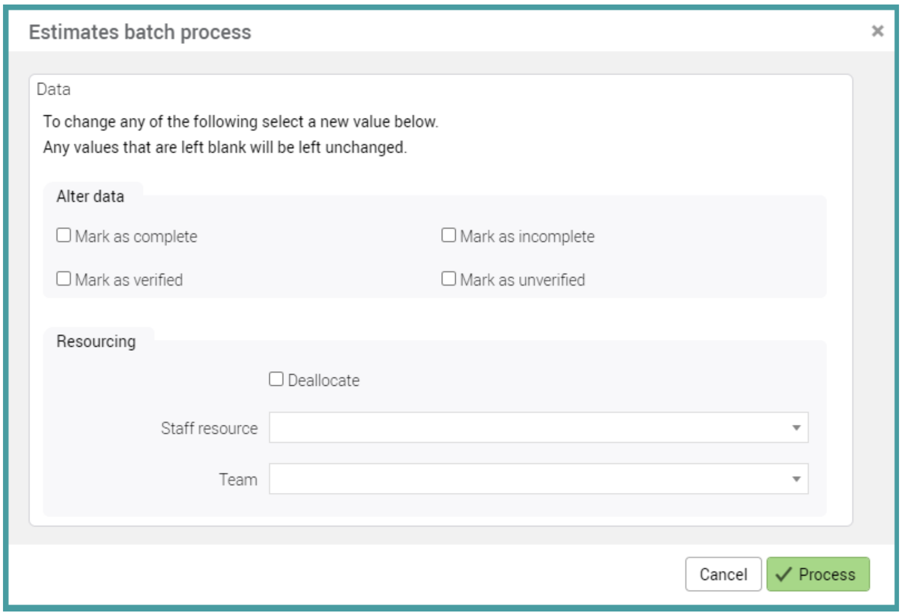
To enable easier sorting and filtering, enhancements to ‘My tasks’ include:

- Views button
- Actions button
- Filter button
- Delete button
- Search Window
- A to Z filter buttons



Batch updating in My Tasks

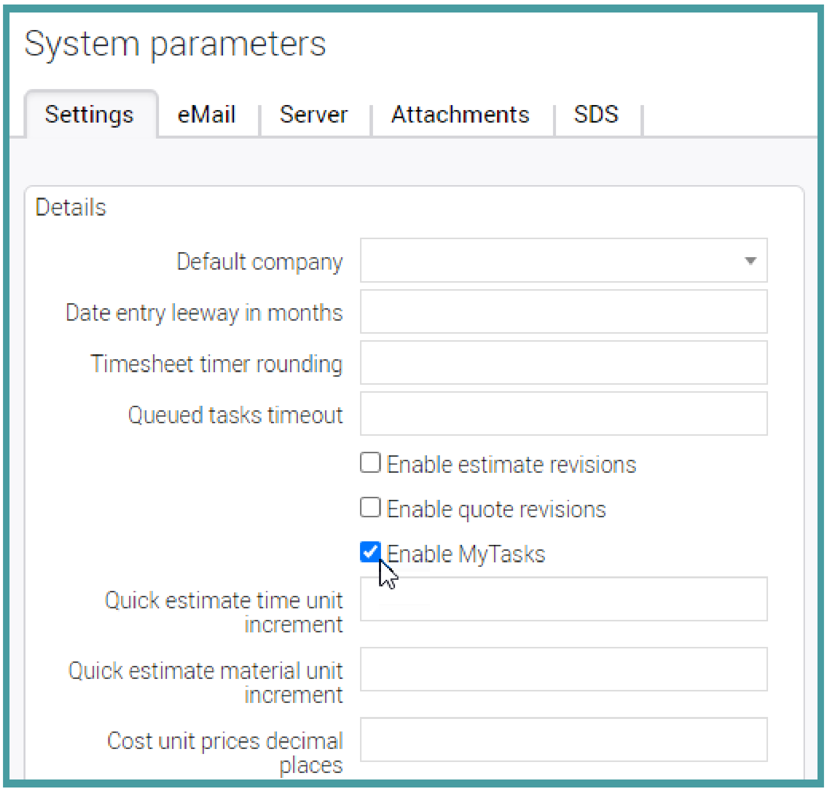
- Select tasks by ticking the checkboxes down the left-hand side of the list
- Click on the 'Actions' button
- Choose the 'Batch update' option



Enabling 'My tasks' in the main menu

To enable 'My tasks':

- Navigate to 'Settings' and select 'Utilities'
- Click on 'System parameters' in the 'System' panel
- Tick 'Enable MyTasks' (Untick to disable)

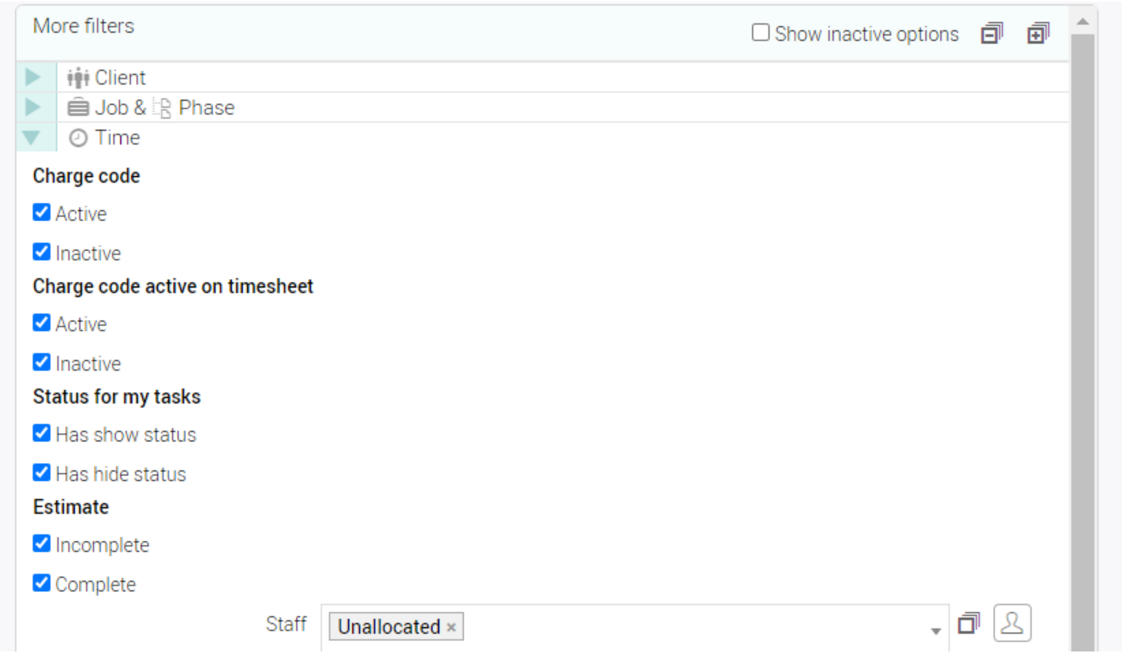


Allocating an estimate to a member of staff

Allocating an estimate to a member of staff was previously done via the 'Estimate' tab of a phase. It is now possible to allocate an estimate from within 'My tasks'. To allocate an estimate to a member of staff:

- Select the view 'ALL' or create a selection of estimates using the filter
- Click on the required charge code in the list to open the estimate
- Allocate the estimate to a member of staff

Note: When selecting view 'ALL', an additional column labelled 'Staff' appears on the left-hand side of the Task list. Estimates allocated to all users (not just the current user) are displayed. It is possible to create a view that only displays unallocated (unassigned) estimates:



Note: 'My tasks' is a legacy feature that has largely been superseded by the 'My calendar' feature.

TIME & BOOKINGS

Enhancements to the Time & Bookings feature

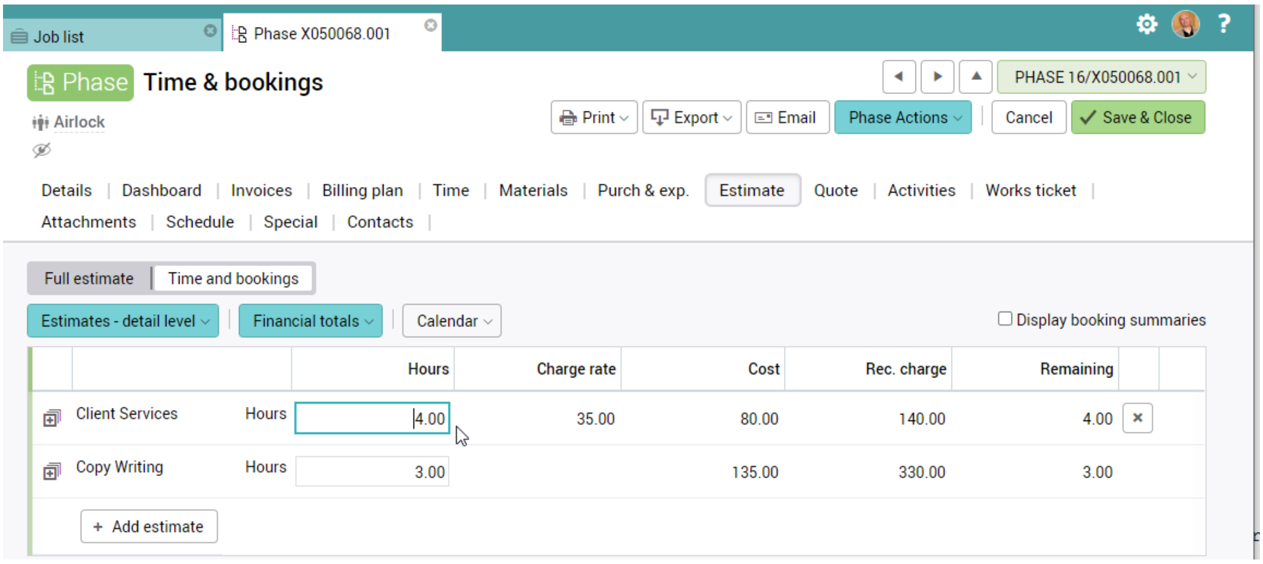
The 'Time & bookings' feature – available from the Estimate tab – was added to Synergist in version 12.4. The feature provides a user-friendly way to create estimates, edit them in-line, and create bookings against the estimates which then appear in the main calendar (typically as draft bookings).

The 'Time & bookings' interface also enables users to see how much of a budget has been used up, and if it is over or under booked etc.

This new release sees some important enhancements to this feature.

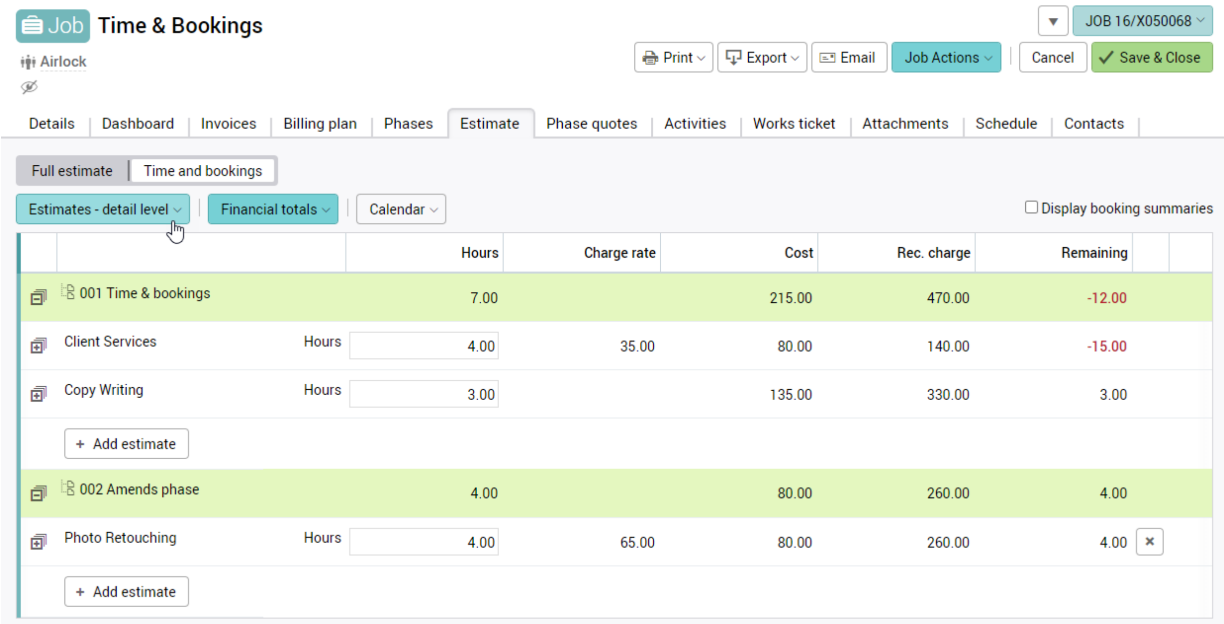
Editable estimated hours

Previously, it was not possible to edit the estimated hours for a charge code if bookings existed against the item. This restriction has now been removed.



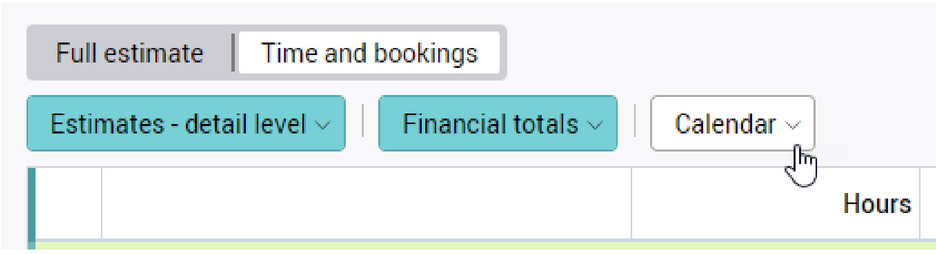
Default view - estimate detail level

When 'Time & Bookings' is first opened on a job or phase, it defaults to a summarised view – 'Estimates detail level'. This view provides a clear indication of hours budgeted and hours remaining. To see more details regarding a specific estimate line simply click on the 'twisty' on the left-hand side of the line.

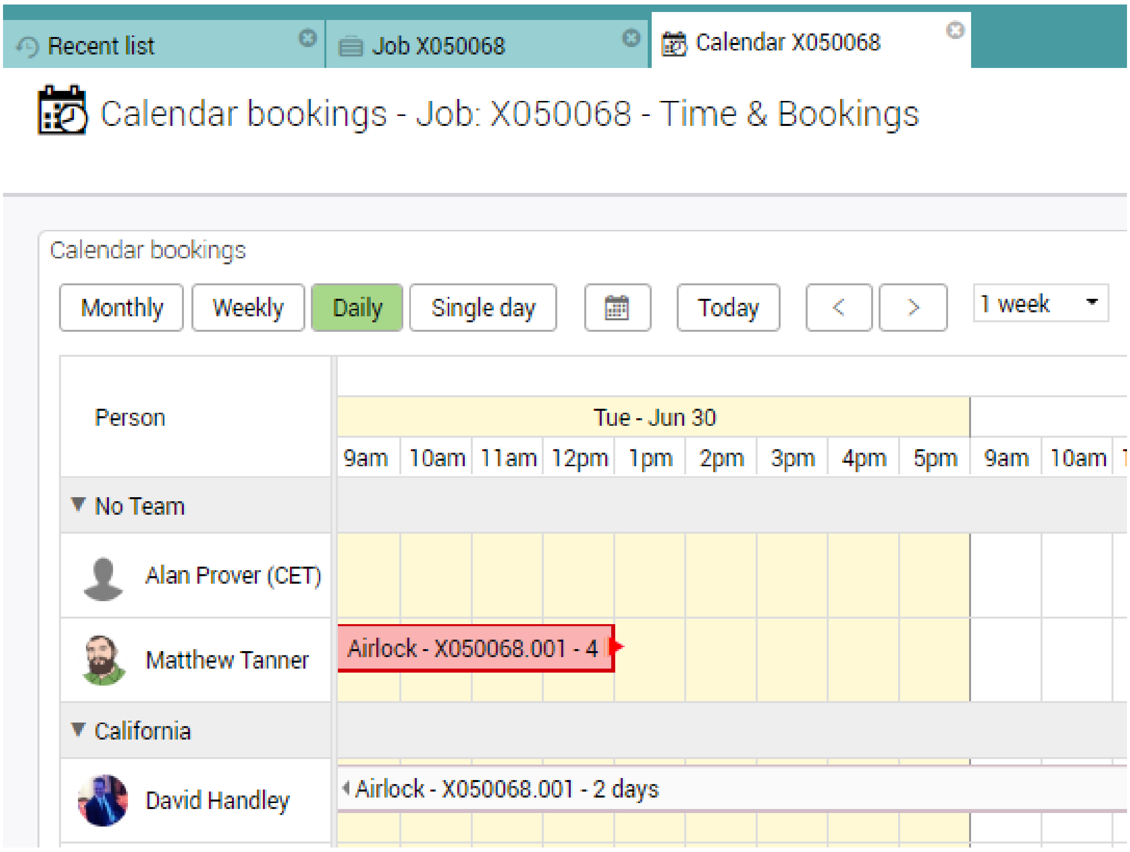


Easy access to the calendar

When estimates and bookings have been added, review the bookings in the calendar by clicking the 'Calendar' button towards the top of the screen.



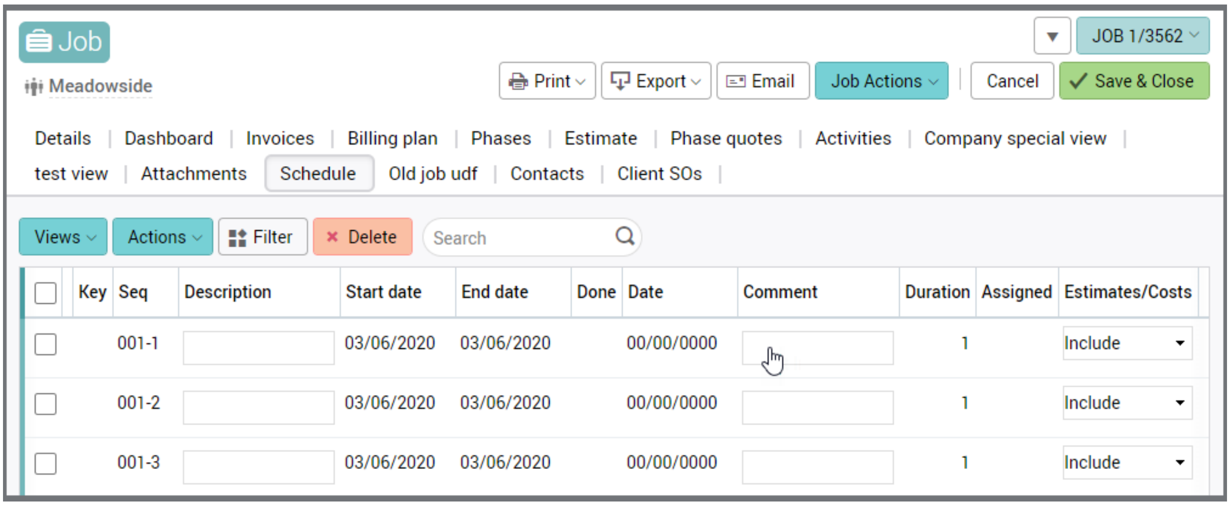
Example: Bookings for the job



SCHEDULE OF JOB STAGES

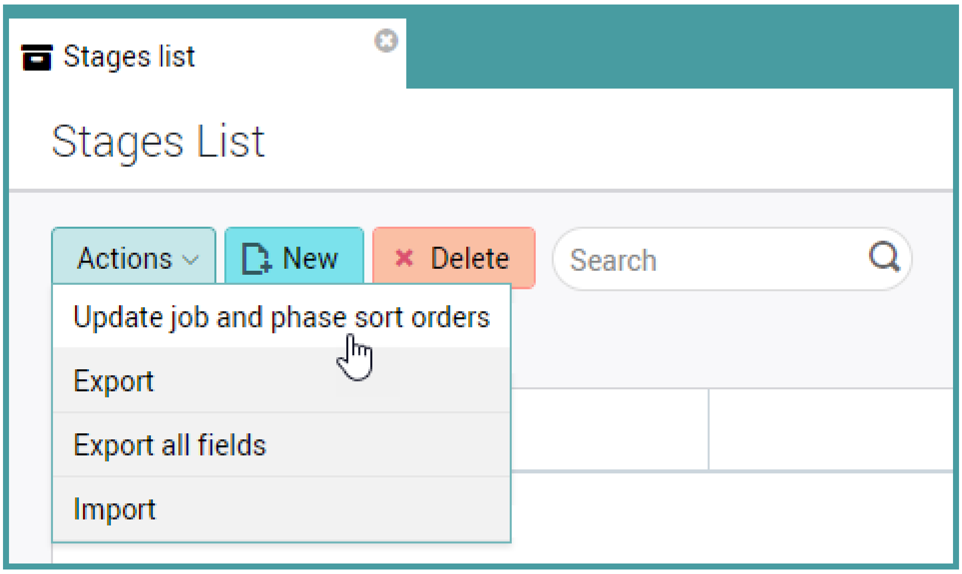
Editing comments on the Job/phase Schedule tab

This feature makes it possible to edit Stage comments directly from the Schedule tab without the need to open a stage.



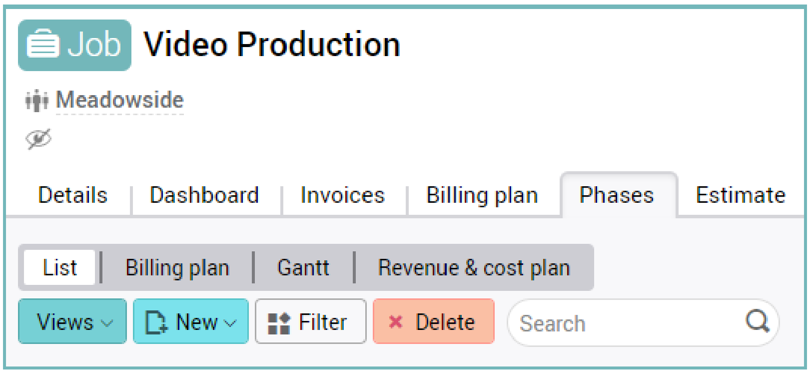
Stages List - Update job and phase sort orders

In 'File Maintenance', if changes are made to the stage order, short code or stage description, these changes can be applied to the existing job/phase current stages by using the action 'Update job and phase sort orders'

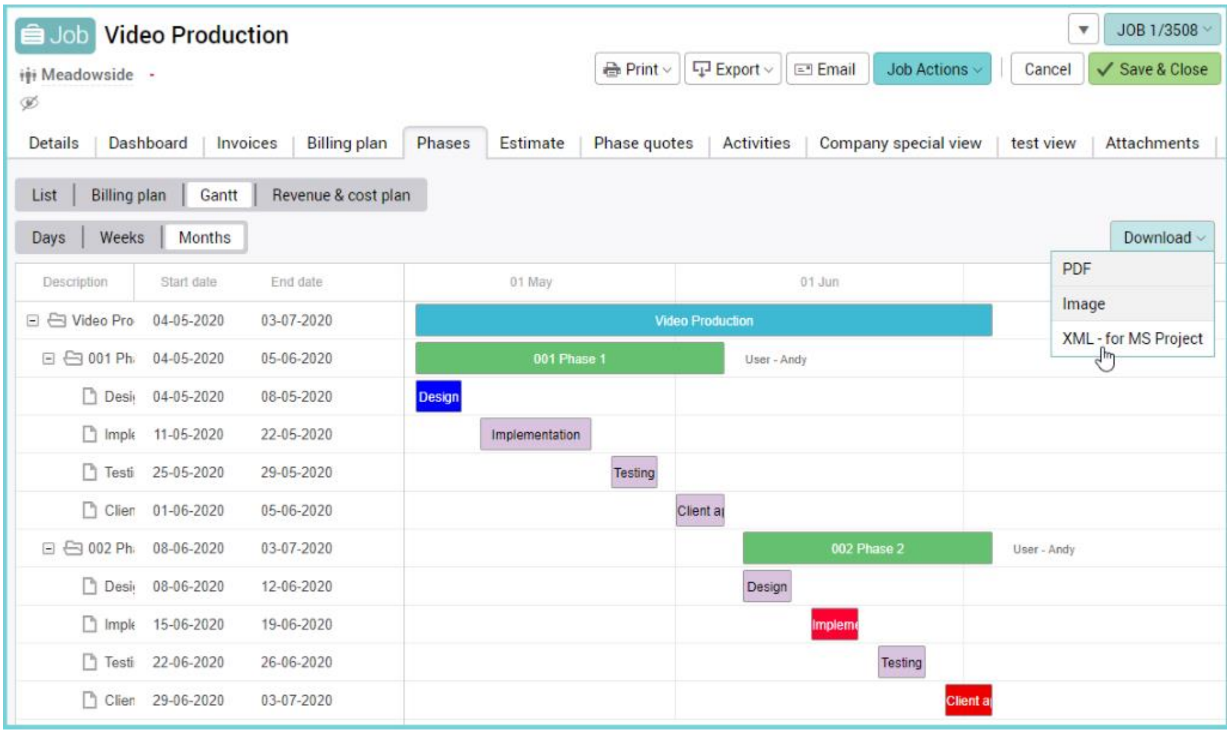


Gantt chart output including 'XML – for MS Project'

Gantt charts are accessed from the Phases tab of the job card.



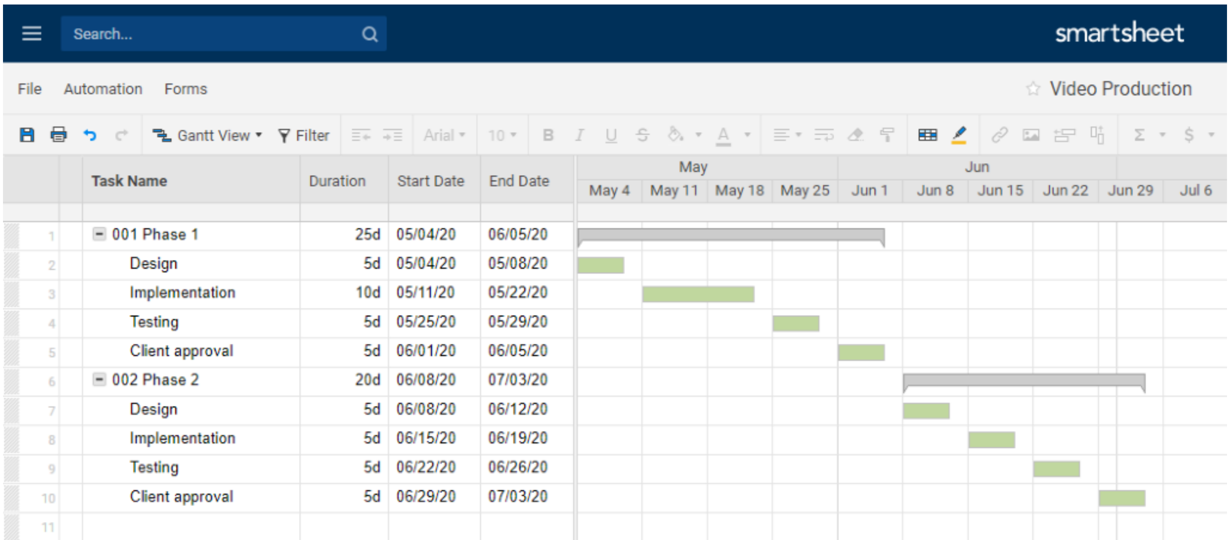
When Gantt is selected, download the chart by clicking on the 'Download' button towards the top right of the screen and selecting one of the three options (PDF, Image or XML – for MS Project).



Importing the XML export into a 3rd party Gantt tool

The XML export can be imported into MS Project and other 3rd party Gantt tools akin to www.projectplan365.com or www.smartsheet.com

Example of an XML file imported into smartsheet.com



Note:
Exporting the 'XML – for MS Project' file creates a temporary and flexible copy of a Gantt chart - convenient for advanced printing options and client facing charts. Any changes to the copy of the Gantt are not reflected back into Synergist. Please refer to Microsoft Support for any additional assistance.

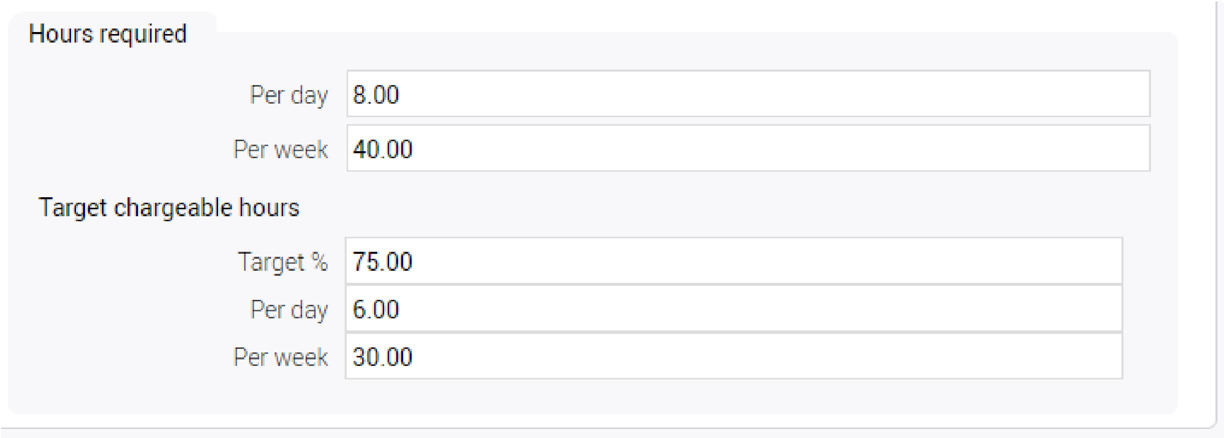
MANAGING TARGETS / HOLIDAYS

Option for holidays to be deducted from targets

Staff resources can be given targets to achieve in terms of timesheets required and what percentage of these timesheets should be posted to chargeable codes / jobs.

Example of a user's staff record:

In the following example, a user is expected to post 40 hours of timesheets per week with target chargeable hours of 75%:

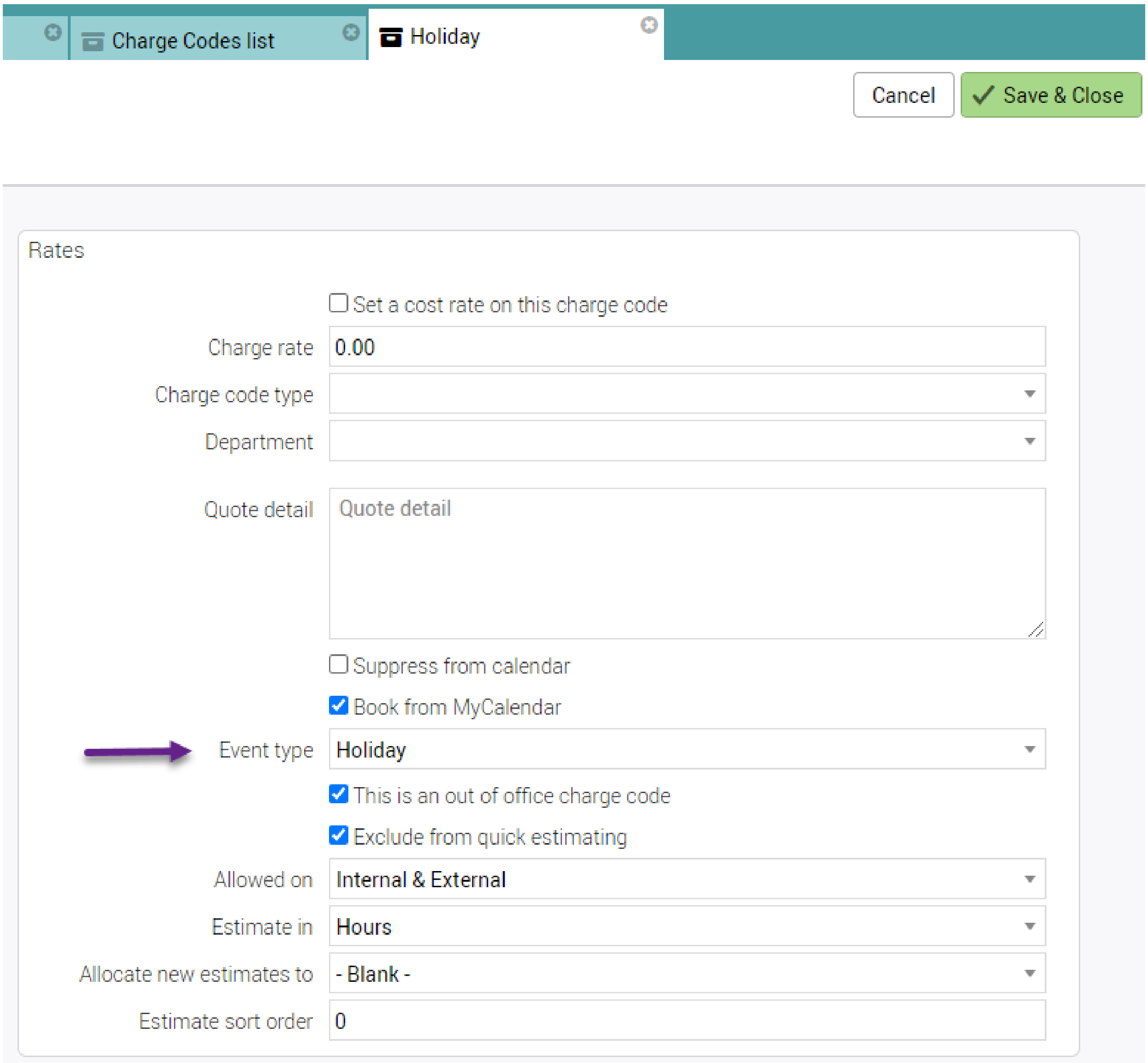


However, should these targets be adjusted if the user is on holiday during some of the period being analyzed?

This new feature enables targets to be automatically adjusted if time is posted to certain charge codes.

Setting up a 'Holiday' charge code

In the following example, a charge code has been set up with the 'Event type' set to 'Holiday'. This indicates that timesheets posted to this charge code no longer appear on certain reports. In addition, the staff target for the period is reduced to take into account time sheeted holidays.



Example of time added for this user:

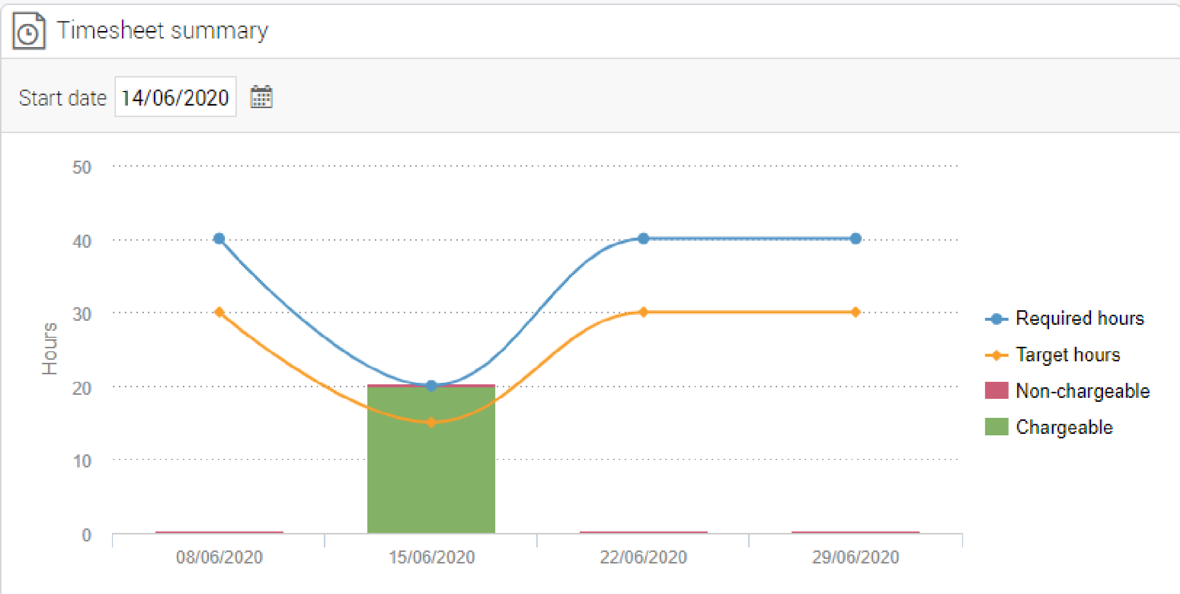
In the following example, half the week has been time-sheeted to holidays and the other half to chargeable work.

	Jun '20 15 Mon	Jun '20 16 Tue	Jun '20 17 Wed	Jun '20 18 Thu	Jun '20 19 Fri	Jun '20 20 Sat	Jun '20 21 Sun	Total Hours
	Submit	Submit	Submit	Submit	Submit	Submit	Submit	
⏱			4	8	8			20
⏱	8	8	4					20
	8	8	8	8	8	0	0	40
							Hours required	40
							Chargeable entered	20
							Non-chargeable entered	20

Personal Dashboard

The targets have been adjusted to take into account the holidays taken by this user in week commencing 15th June.

Dashboard Personal



Staff utilisation report

The period targets have been reduced for this staff resource.

In this example, the chargeable target has been reduced from 30hrs to15hrs.

synergist Staff utilisation 19/06/20 15:00:26 1

From 15/06/20
To 19/06/20

Code	Name	5 day target	Charge target	Utilisation target %	Total Hours	Charge Hours	Non charge Hours	% of target achieved	Charge % of total	Non charge % of total	% utilisation achieved
16/R	Rob Smith	20.00	15.00	75.00	20.00	20.00	0.00	100.00	100.00	0.00	133.33

	5 day target	Charge target	Utilisation target %	Total Hours	Charge Hours	Non charge Hours	% of target achieved	Charge % of total	Non charge % of total	% utilisation achieved
GRAND TOTAL	**20.00**	**15.00**	**75.00**	**20.00**	**20.00**	**0.00**	**100.00**	**100.00**	**0.00**	**133.33**

JOBS & PHASES

Enhancements to the 'Time' & 'Materials' tab on a phase

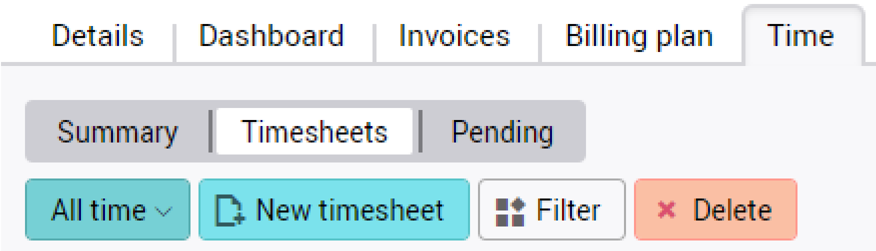
Summary, Timesheets/Material sheets and Pending options:

Summary
- Estimates that have timesheets
- Timesheets are summarised by estimate

Time / Material sheets
- List of time / material sheets

Pending
- Pending time / materials
- Previously this information was on a separate phase tab

In addition to these options, each section can be filtered:



CLOSING JOBS

Rename 'Final invoiced' to 'Closed'

Synergist has various fields that define the status of jobs and phases. Each job or phase is typically set to be at the status of either Quote or Live. This is unchanged in version 12.5 and is only mentioned for clarity regarding job statuses.

Quote status

Also called 'Opportunities' - if at job level. These are jobs or phases that are not yet live.

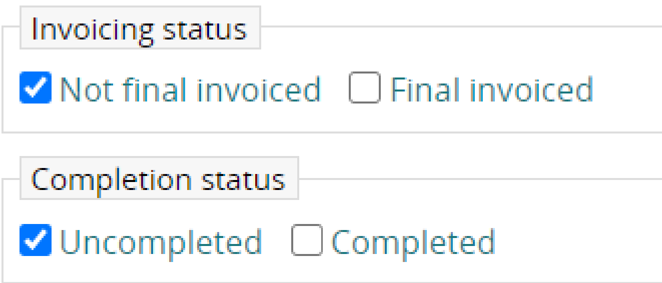
Live status

These are jobs or phases that are live and can be worked on.

Financial status

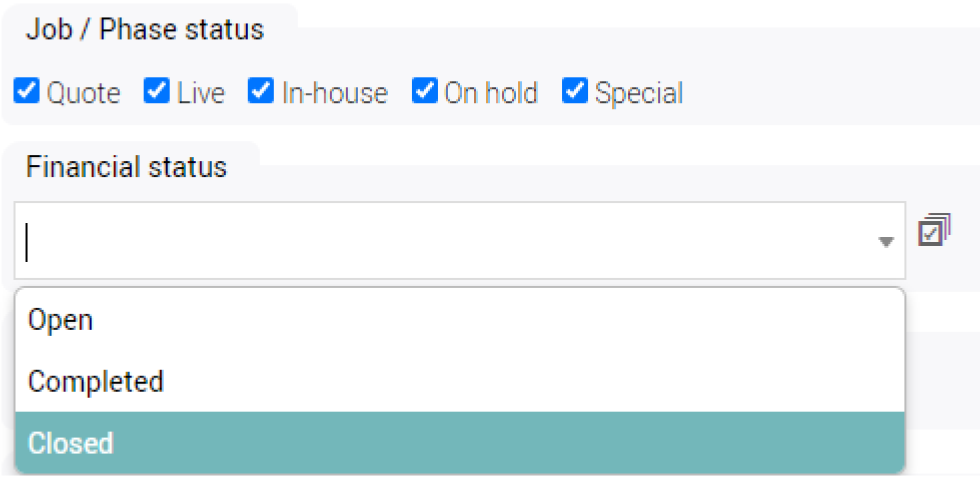
In addition to the Live status, the job or opportunity need to specify whether they are still current. The Financial status is defined by whether the job/phase is 'Completed' and/or 'Final invoiced'.

In previous versions of Synergist, checks could be made using various combinations of status flags to filter the job/phase list.



New options:

To make the process easier, a new 'Financial Status' menu with simpler terminology has been introduced:



Open

Returns jobs that are neither complete nor final invoiced.

Completed

Returns jobs that have been marked as 'Completed' but have yet to be final invoiced.

Closed

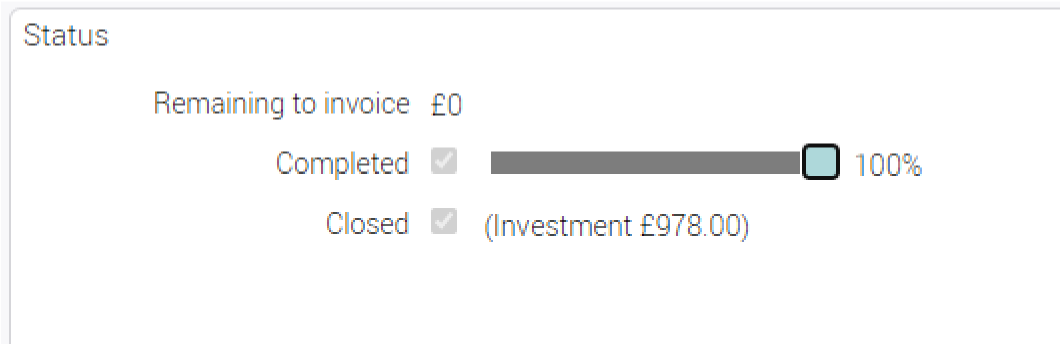
Returns jobs that have been final invoiced.

All these options may return both Quote and Live status jobs. This filter is concerned only with the 'financial' status of jobs and phases.

Note: If the 'Financial Status' box is left empty, the jobs/phases are not filtered by their financial status.

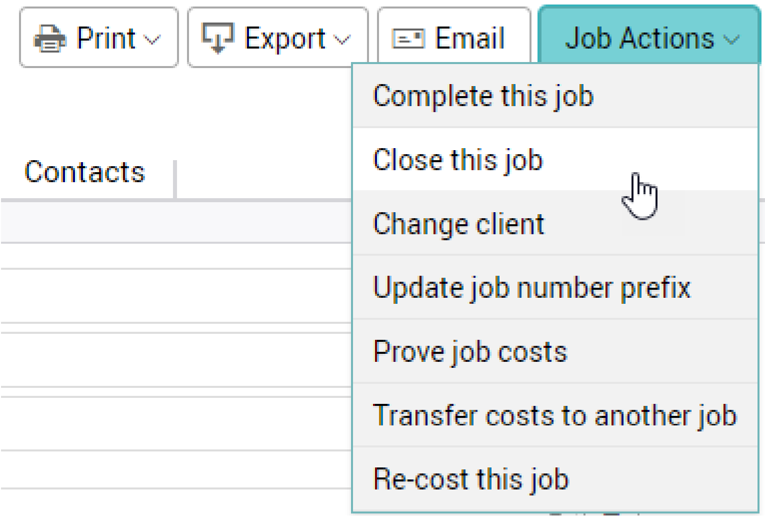
Dashboard tabs

On a job or phase 'Dashboard' tab, the term 'Closed' is used to indicate that a job or phase has been final invoiced.

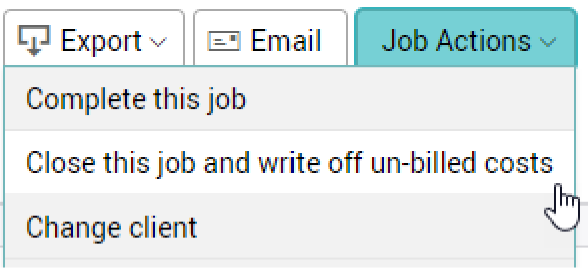


Completing & Closing jobs and opportunities

Similarly, the same terminology is used to close jobs when no further invoices are to be raised.



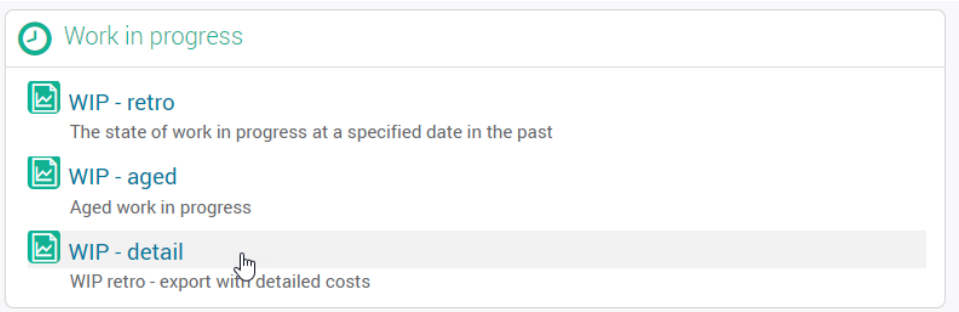
If the job has unbilled costs associated with it, closing the job automatically writes off these costs.



REPORTS

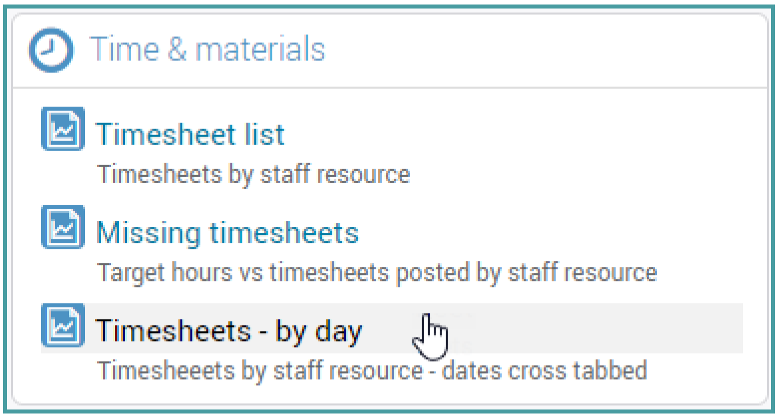
WIP Detail Export added to the standard reports

The ‘WIP – detail’ report is similar to the ‘WIP – retro’ report but with detailed costs. Instead of a summary for each job still in WIP, this option exports a CSV file containing a row for each timesheet, material booked and purchase order.



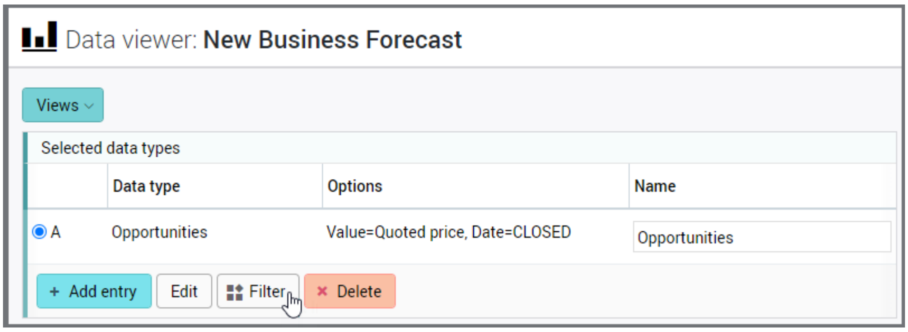
Timesheets by day - added to the standard reports

This displays a cross-tabbed list of timesheets posted, ordered by staff resource.

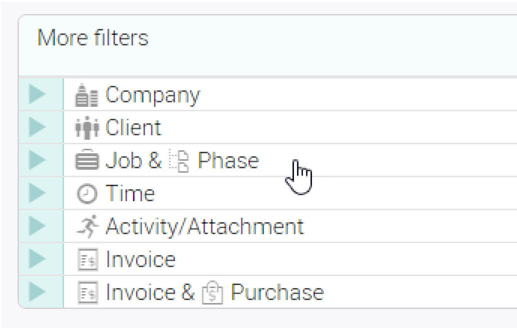


Stage filter added to the Data viewer

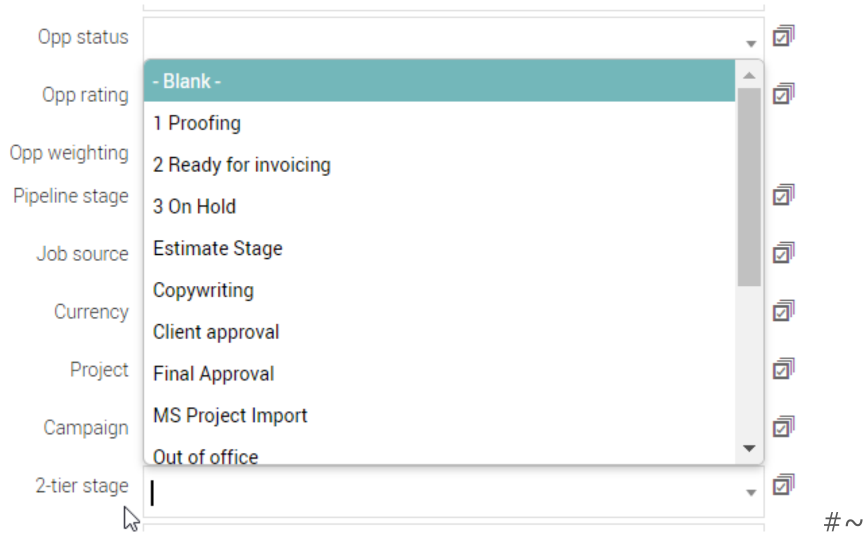
An additional filter has been added to the Data viewer filter, making it possible to filter by phase stages.



Open the 'Job & Phase' filters in the 'More filters' panel:



Scroll down the list and locate the '2-tier stage' filter:



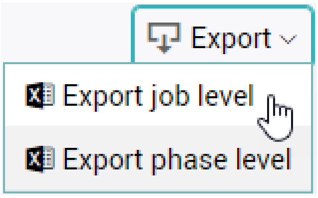
Additional columns added to the Revenue management export

The following columns have been added to the 'Revenue management' spreadsheet:

- Stage
- Stage short note
- Handler
- Due date
- Status

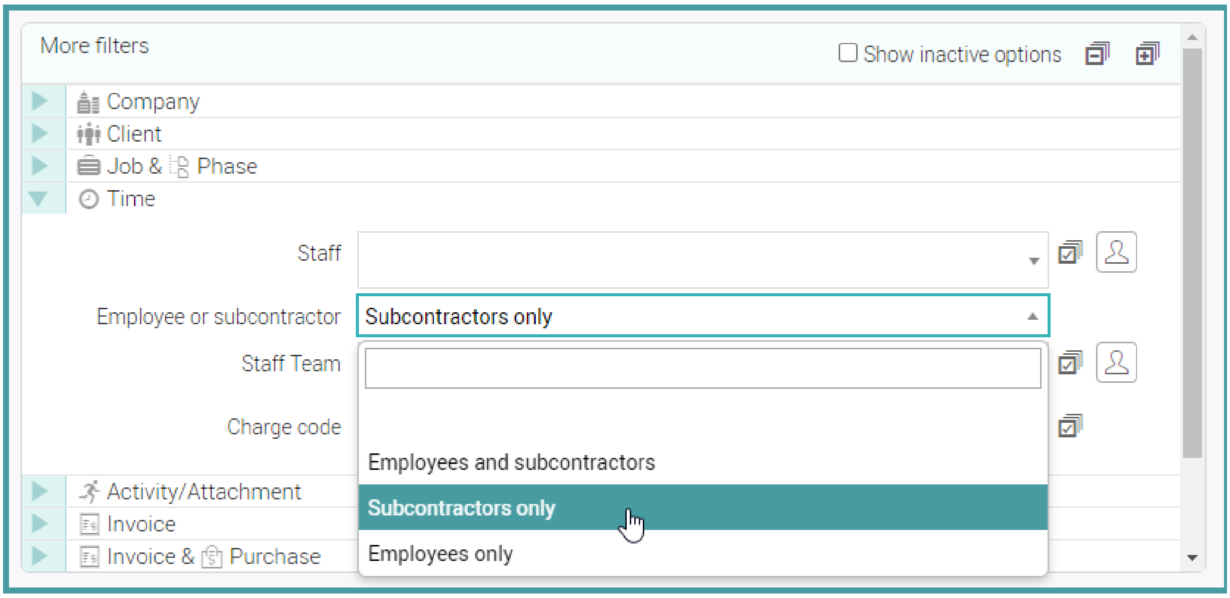
To export the 'Revenue management' spreadsheet:

- Choose 'Revenue mgmt.' in the main menu
- Click on the Export button
- Select to export at job or phase level



Support for filtering in/out sub-contractors

'Data viewer' and 'Standard reports' now have a feature to filter by sub-contractors.



Sales Turnover report

Job description is now included on 'Sales turnover' reports.

Note: Multi-job invoices do not have a job description in the report because the invoice may include multiple jobs/phases.

Purchase invoice detail export

The following fields have been added to the 'Purchase invoice detail' export:

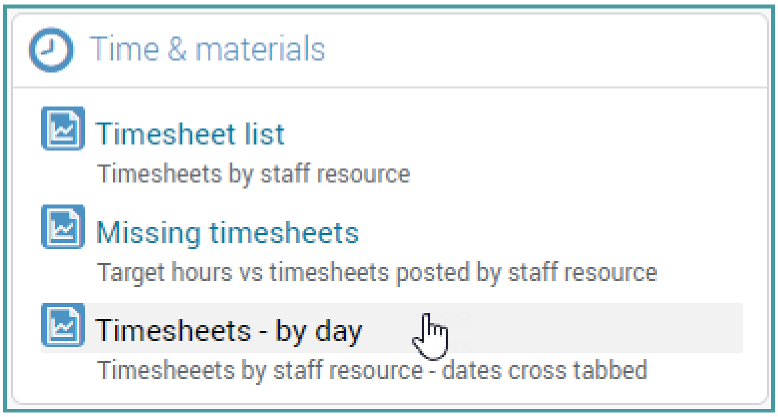
- Currency code
- Converted value

To export and view the additional fields:

- Select 'Standard reports' in the main menu
- Click on 'Purchase invoices detail' in the 'Purchasing & expenses' panel
- Choose 'Export CSV' or 'Create PDF'

'Timesheets - by day' added to Standard reports

'Timesheets - by day' displays a cross-tabbed list of timesheets posted, ordered by staff resource.



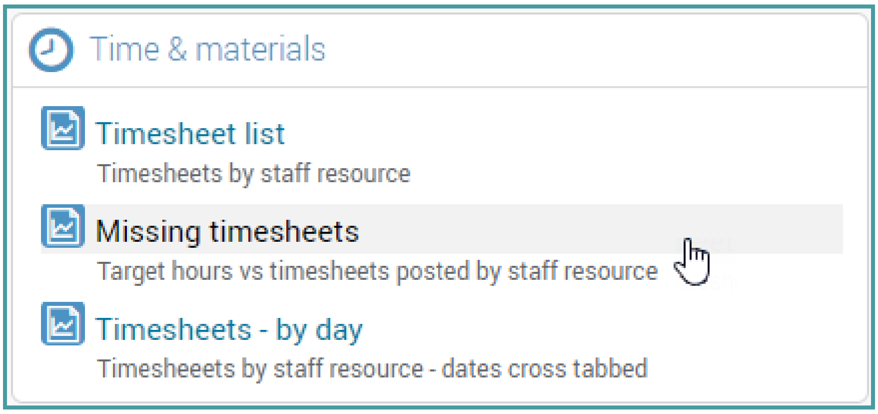
Timesheets list – export

The following fields have been added to the 'Posted timesheets list' export:

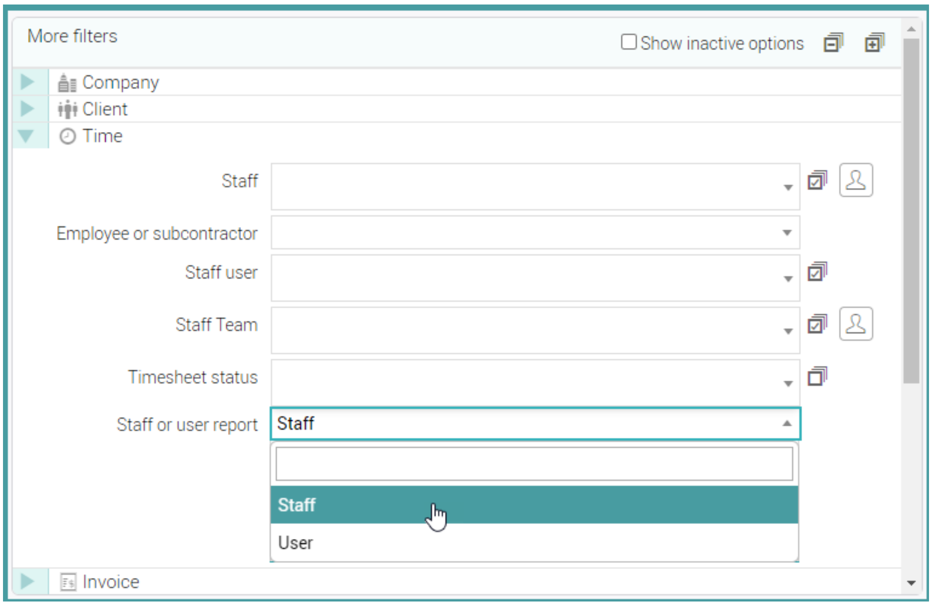
- Event (to indicate holiday type timesheets)
- Job handler
- Phase handler
- Posted timesheets:

Missing timesheets – 'Staff or user report' filter

A new filter, 'Staff or user report', has been added to reports for 'Missing timesheets'. This feature is useful if multiple companies share the same resources. By selecting multiple companies and the new 'user' based setting, the system selects all the appropriate staff resources for the report - identifying staff resources associated with users.



Example of filter options:



Handler’s name included in the ‘Costs & quotes’ report

In the ‘A/H’ column on the ‘Cost and quotes report’, the handler’s name has replaced the handler’s initials.

	A	B	C	D	E
1	Job Numb	Client	Job Descri	A/H	Estimated
2	1/0000351	Meadows	New Prod	Katherine Jordan	
3	1/0000356	Meadows	Library	Peter Sharpe	
4	1/0000356	Meadows	Fly-Me	Callum Wallace	
5	1/0000356	Meadows	Screen De	Joel Stokes	
6	1/0000357	Meadows	Testing	Jacob Austin	

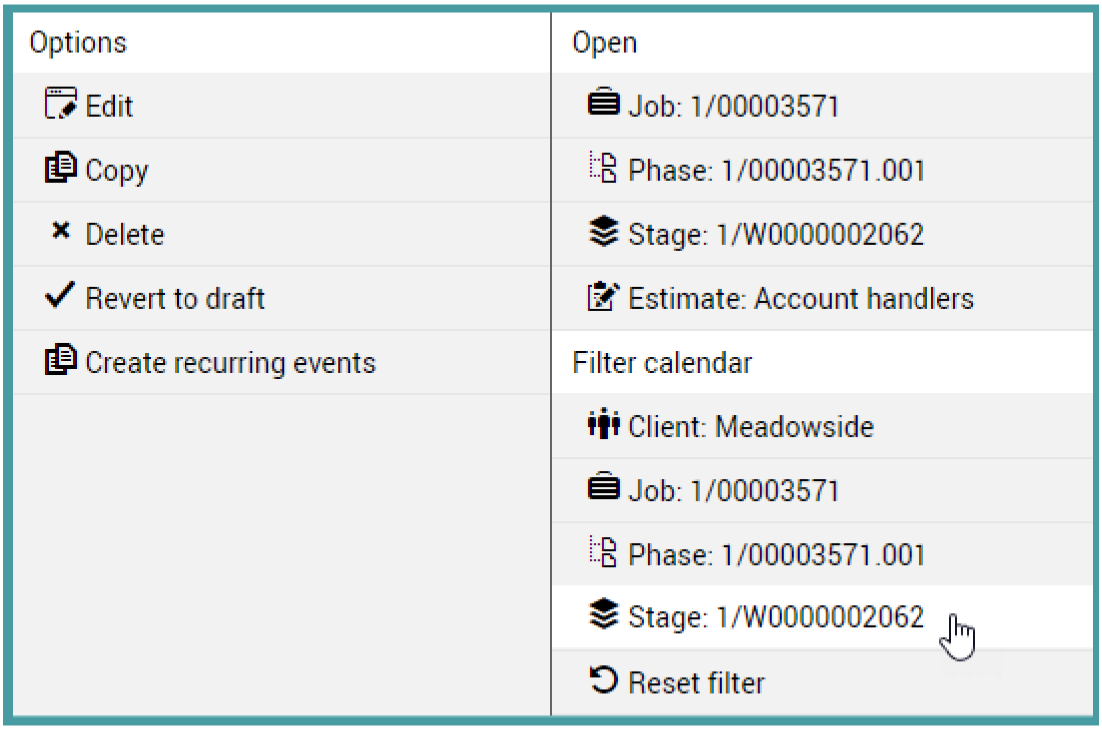
CALENDAR BOOKINGS

Filter Calendar by Stage

An extra filter, 'Stage', has been added to 'Calendar bookings', enabling filtering of the calendar by stages.

Right clicking on a job or requisition in 'Calendar bookings' opens an options window. Within the window, the 'Filter calendar' options include filtering by:

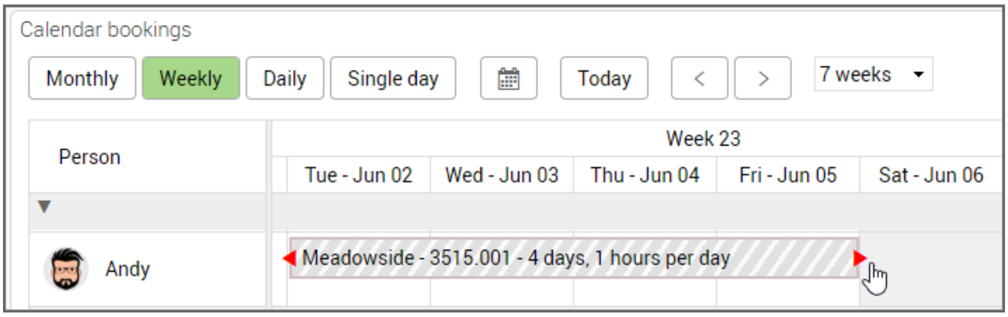
- Client
- Job
- Phase
- Stage (New)



Note: The 'Stage' filter only appears when the selected job or requisition is two tiered.

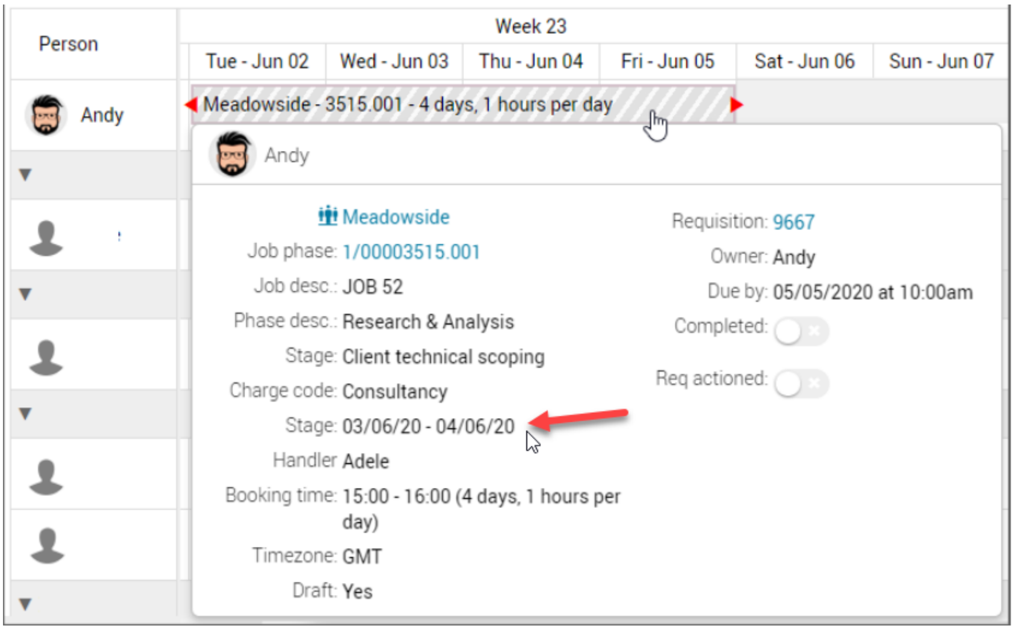
Improved task date indicators on the calendar

In Calendar bookings, arrow shaped task date indicators appear at the beginning and end of bookings when booking dates are outside of the start/end dates of the related phase or stage.

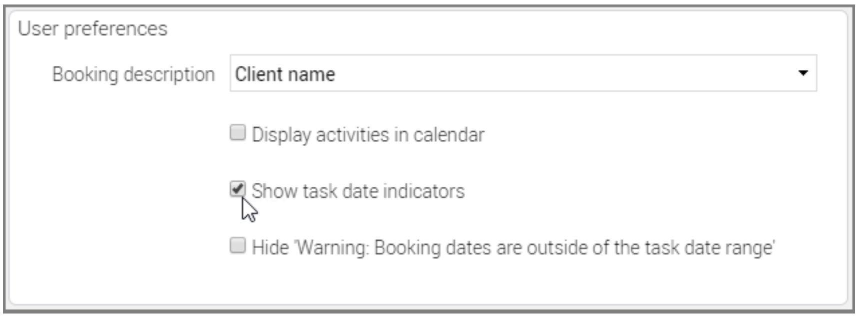


Hover text

The task date indicators above communicate that there is an issue. To see more details, hover the cursor over the booking and this results in the start and end date for the related job/phase/stage being displayed.



Switch on 'task date indicators' in calendar preferences

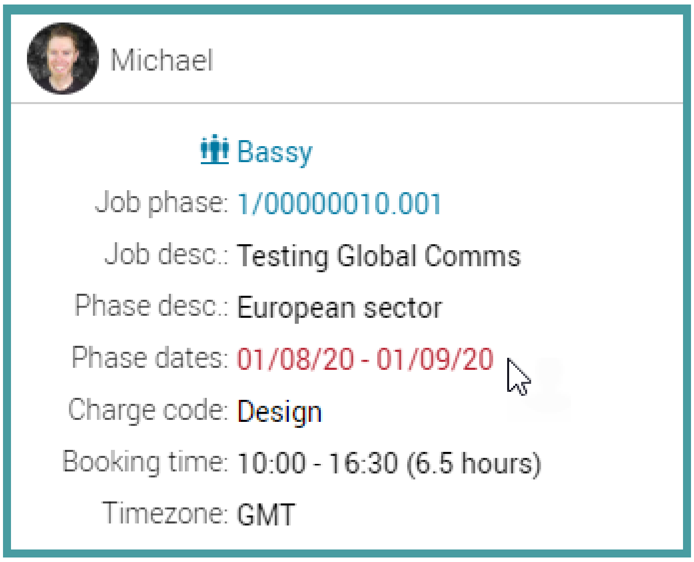


Show start and end dates on hovers in Calendar bookings

Phase/Stage start and end dates have been added to hovers in 'Calendar bookings' and 'My calendar'.

The start and end dates appear in red if the booking falls outside of these dates. This is a useful feature and works in conjunction with the new 'task date indicators' that can be set to display on bookings if the booking has been scheduled to be worked on after it is due to be completed.

Example of a hover with phase dates:

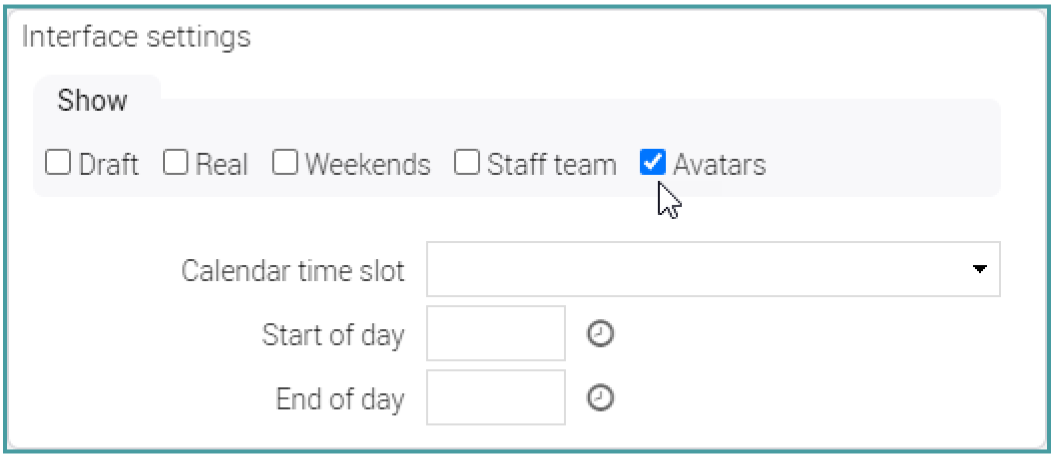


Option to hide avatars in Calendar bookings

If large numbers of staff resources occupy the Calendar bookings interface, the option to hide avatars and increase the number of visible rows is available.

To hide/reveal avatars in Calendar bookings:

- Choose 'Calendar bookings' in the main menu
- Click the 'Preferences' button towards the top right of the screen
- Locate the 'Avatars' checkbox in the 'Interface settings' panel
- Tick the checkbox to display avatars (Untick to hide)



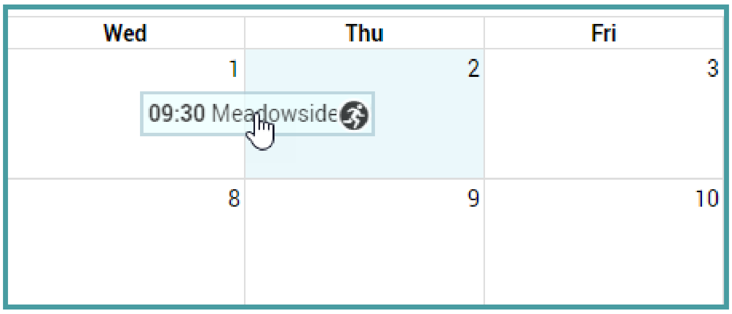
MY CALENDAR

Adjusting activity dates and times

Date and time adjustments can be made to an activity within 'My calendar' depending on which of the following three calendar views is selected:

Month

Activities can be moved (drag and dropped) across the month calendar to occupy a new date but start/end times do not change.



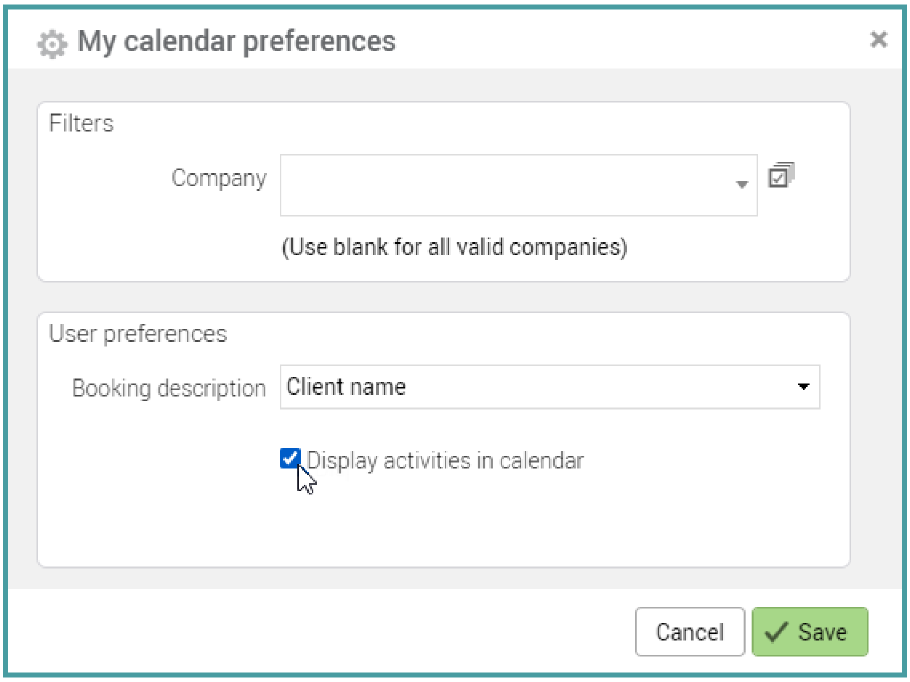
Week

Activities can be moved (drag and dropped) and start/end times adjust automatically.

Day

Activities can be moved (drag and dropped) and start/end times adjust automatically.

Note: To view activities in 'My calendar', click on the 'Preferences' button and ensure that 'Display activities in calendar' is ticked.



MISCELLANEOUS

Project list - Handler column added

Project list - All

Views | New | Delete | Search | ALL # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Project	Client	Handler	Completed...
Neat & Tidy - Product launch		Alan Prover	
New design project	Ward Homes Ltd	Alex Beal	
New Product - Orange	ACME CORP ACME	Toby Knight	
Newton Services	The Bank	Emma Woodhouse	
Next Step - Shoes		Phil Rawson	
North east gateway development scheme	Ward Homes Ltd	William Hammond	

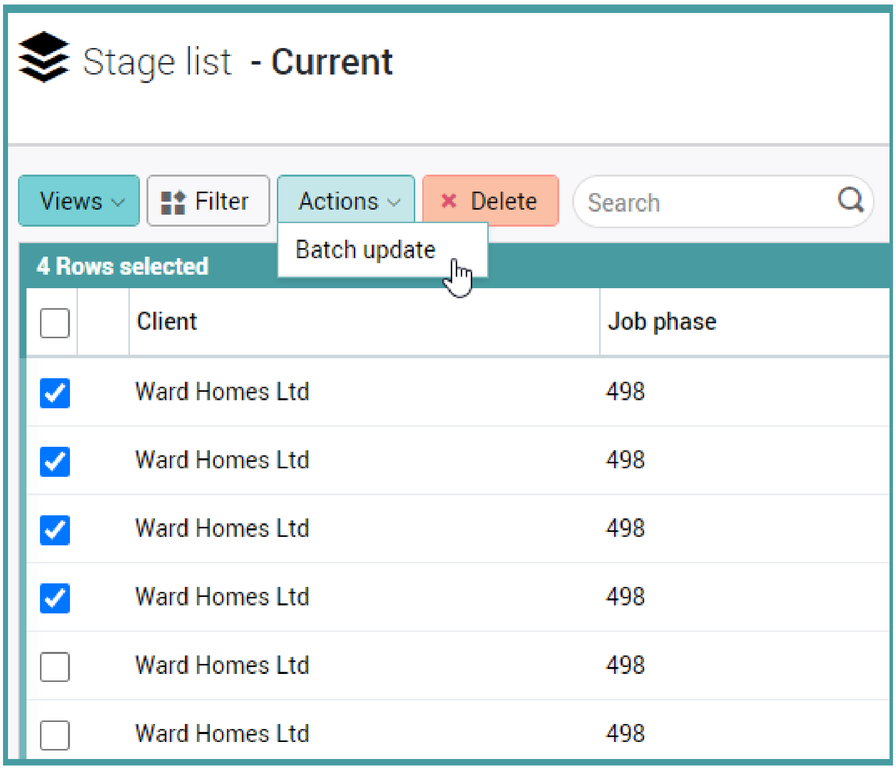
Managed sales orders - Sorting by column heading

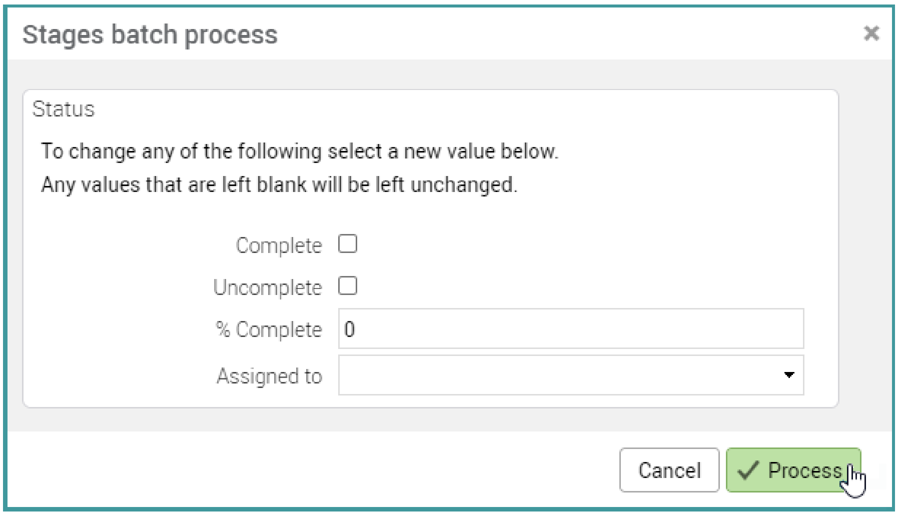
This is an optional module – allowing for special sales order budgets to be allocated to clients – then for these sales orders to be called off against jobs and invoices. The lists of sales orders in both the client and job card, now have sortable columns.

Sales Order	Date	Contact	Value	Allocated	Balance	Invoiced	Notes
1	28/11/2019		£0.00	£0.00	£0.00	£0.00	
2	28/11/2019		£0.00	£0.00	£0.00	£0.00	
3	28/11/2019		£0.00	£0.00	£0.00	£0.00	
4	28/11/2019		£0.00	£0.00	£0.00	£0.00	

Stage list - Batch update

'Batch update' is now available in the 'Stages list'. It is particularly useful for batch completing several phase stages.



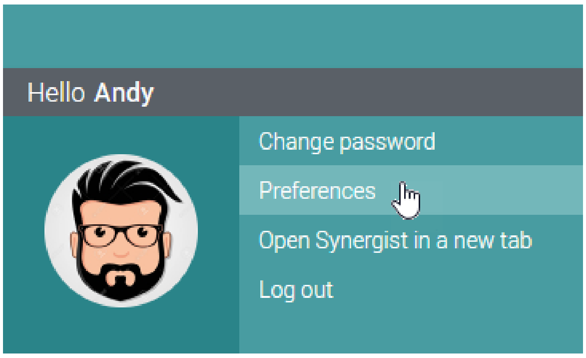


Multi-factor authentication for Synergist

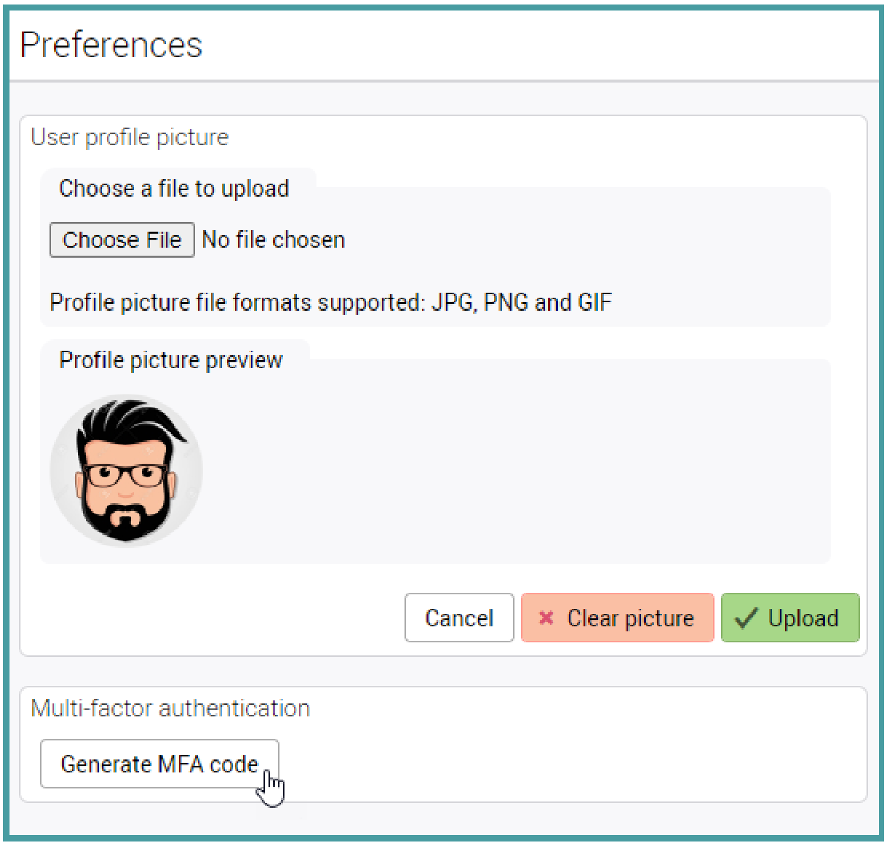
When logging into Synergist, the 'Username' and 'Password' fields provide one level of user authentication. Synergist's multi-factor authentication (MFA) protects the Synergist application and data by means of a second level of validation.

Adding multi-factor authentication:

- Login to Synergist as the user
- Click on the user profile picture in the top right-hand corner of the screen
- Select 'Preferences' from the drop-down menu

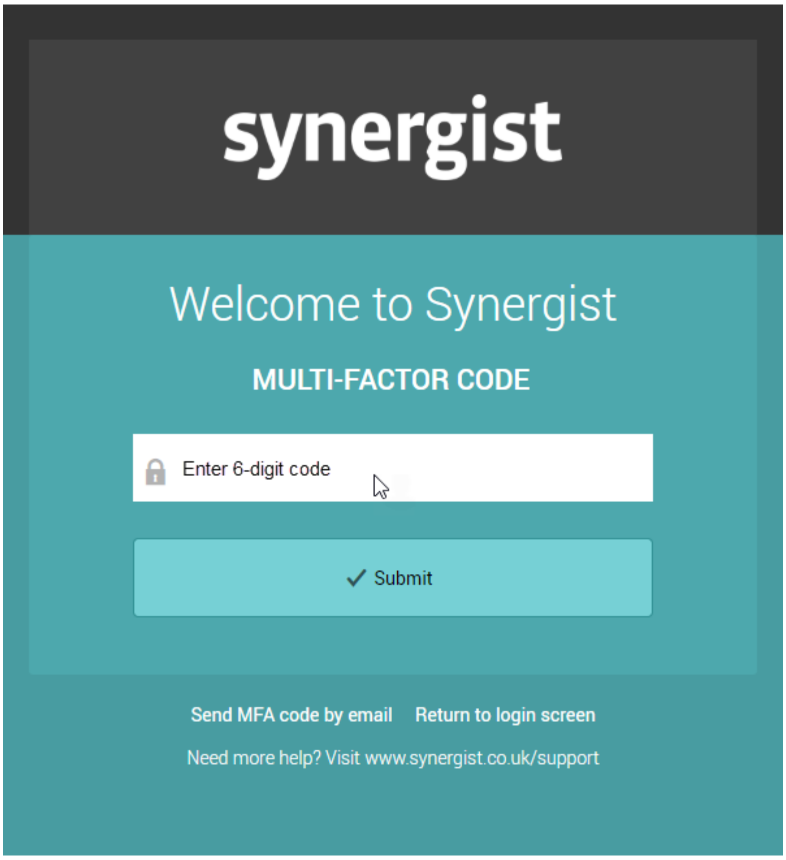


- Locate and press the 'Generate MFA code' button towards the bottom of the 'Preferences' screen



- Select one of two authentication methods:
    - Authenticator App
    - Email

The MFA takes effect the next time the user attempts to login to Synergist. After entering their username and password (first level authentication), an additional screen appears, requesting a 6-digit code (second level authentication).



Removing multi-factor authentication

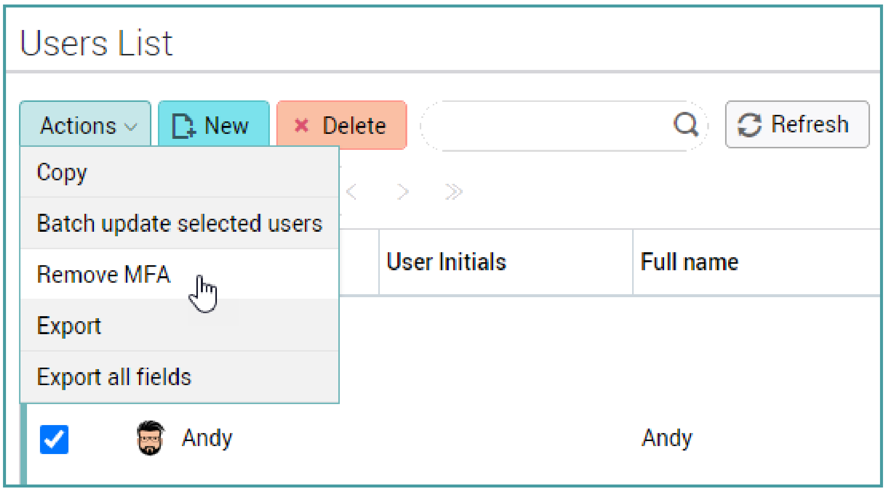
There are two ways to remove multi-factor authentication.

Method A - Login to Synergist as the user

- Click on the user profile picture in the top right-hand corner of the screen and select 'Preferences' from the drop-down menu
- Locate and press the 'Generate MFA code' button towards the bottom of the 'Preferences' screen
- Click on the 'Remove MFA code' button towards the bottom of the screen

Method B - Login to Synergist as another user:

- Navigate to 'Settings' and select 'File maintenance'
- Click 'Users' in the 'Users & Staff' panel
- Locate and tick the check box for the user for whom MFA is to be removed
- Press the 'Actions' button and choose 'Remove MFA' from the menu

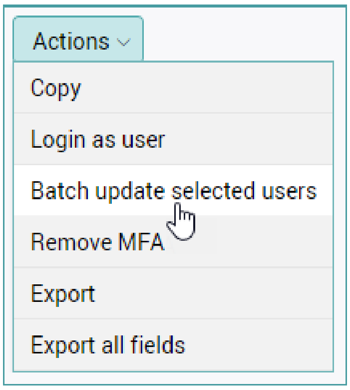


User list - Key batch update options

Clear future calendar bookings

This feature deletes any bookings for inactive users, dated after today's date.

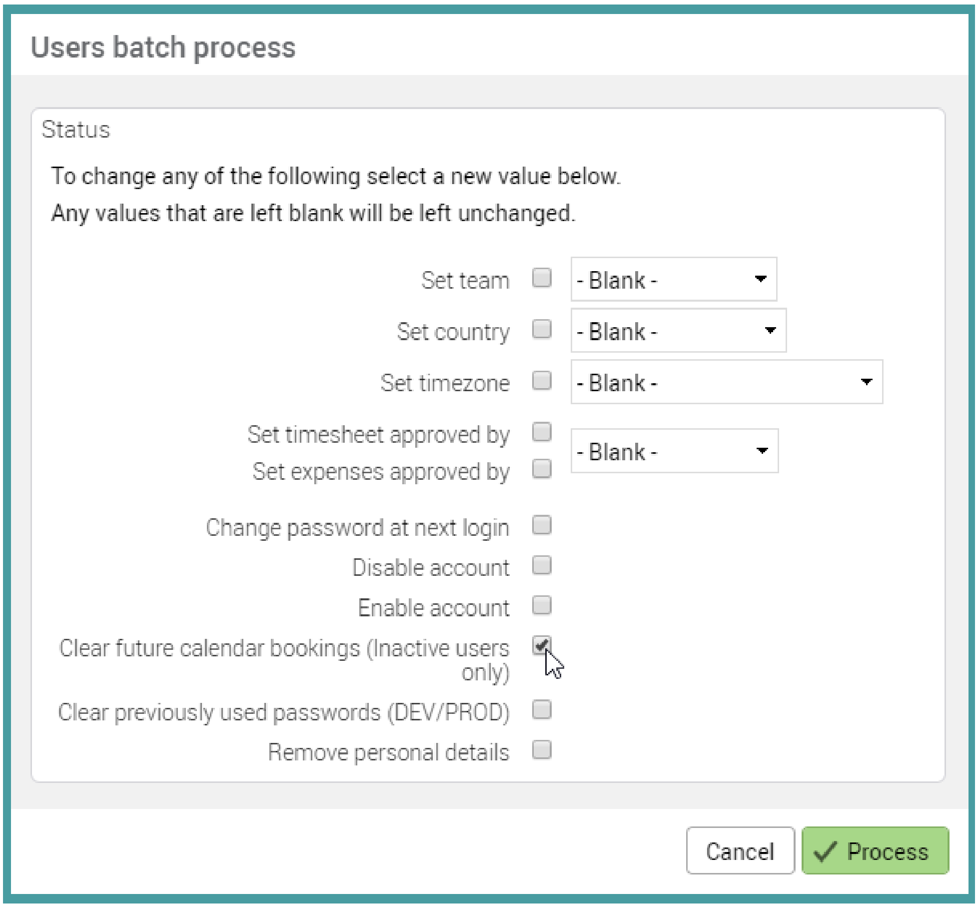
Note: For multi-day bookings with days in the past and at least one day in the future, the entire booking is deleted.



Remove personal details

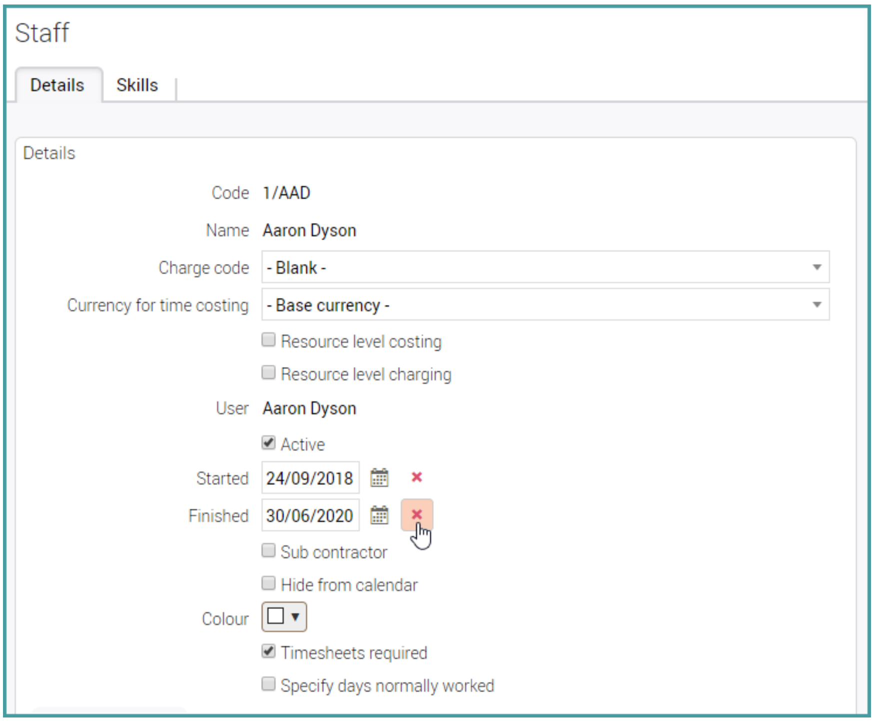
To ensure GDPR compliancy, this feature should be run when a member or staff leaves a company. Emails, addresses and phone numbers etc. are blanked out.

Batch process form



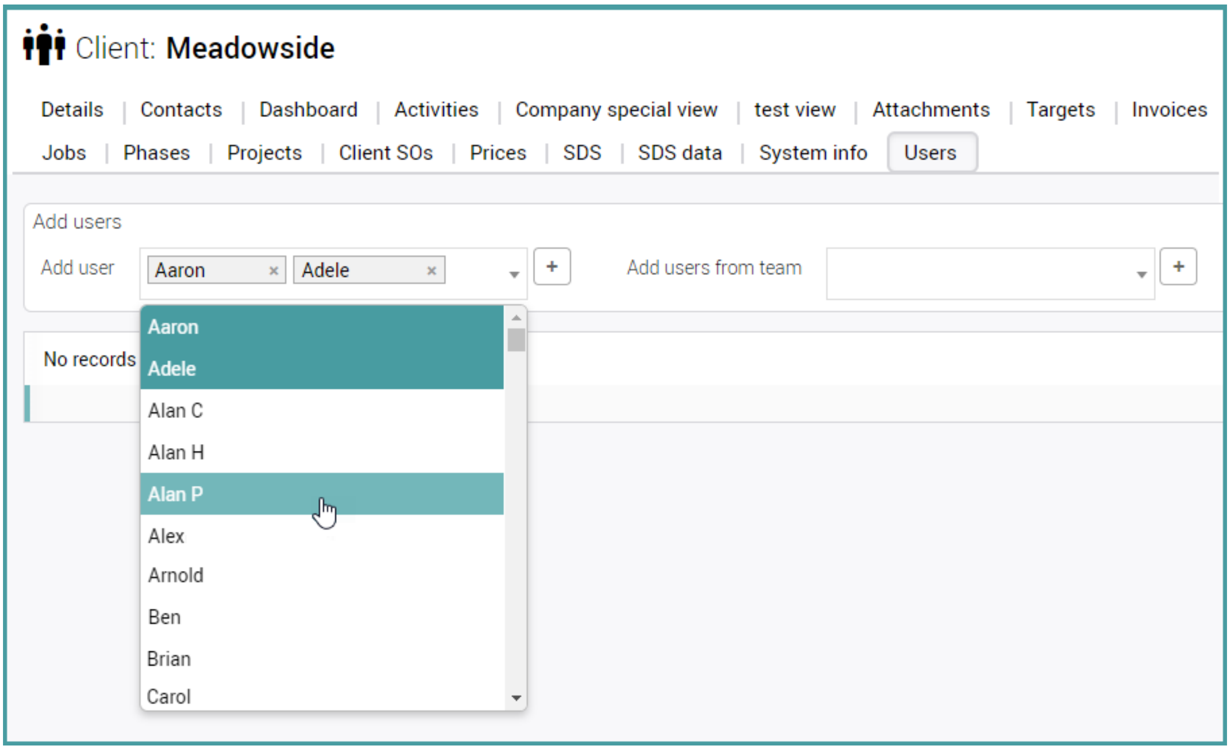
User record – editing start/finished dates

'Started' and 'Finished' dates on a staff record can be deleted/zeroed out. This is sometimes necessary if a member of staff leaves the company and then returns.



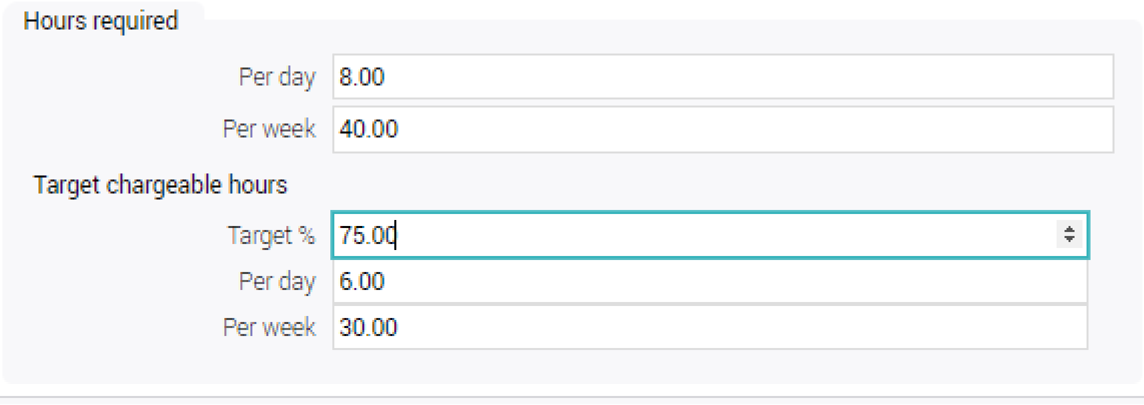
Assigning users to client

The functionality of adding users to a client has been improved, allowing multiple selections of 'Users' or 'Users from teams' via the drop-down menu.



Staff - Target chargeable hours

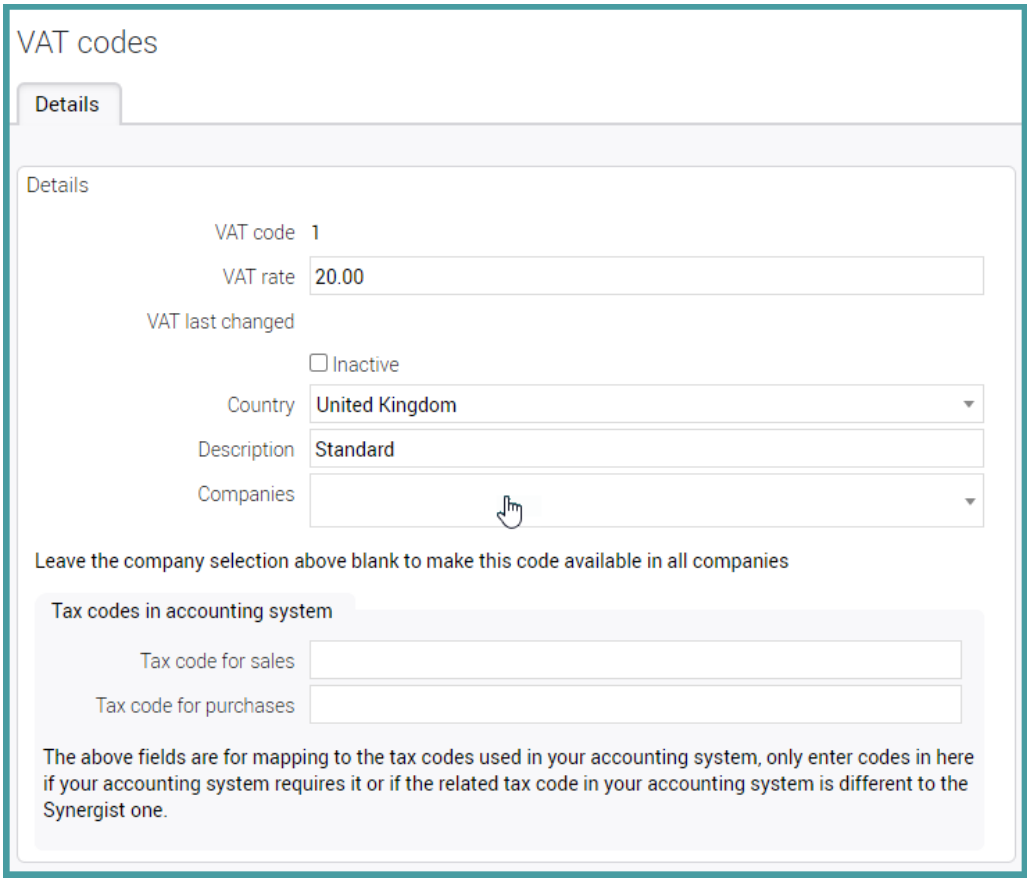
Previously the number of chargeable hours had to be specified. Now a 'Target %' can be used.



VAT codes - 'Companies' field

A new multi-select field labelled 'Companies' has been added to VAT codes.

Adding entries to the 'Companies' field makes the VAT code exclusive to the company or companies listed. If the 'Companies' field is left empty, the VAT code remains available to all companies.

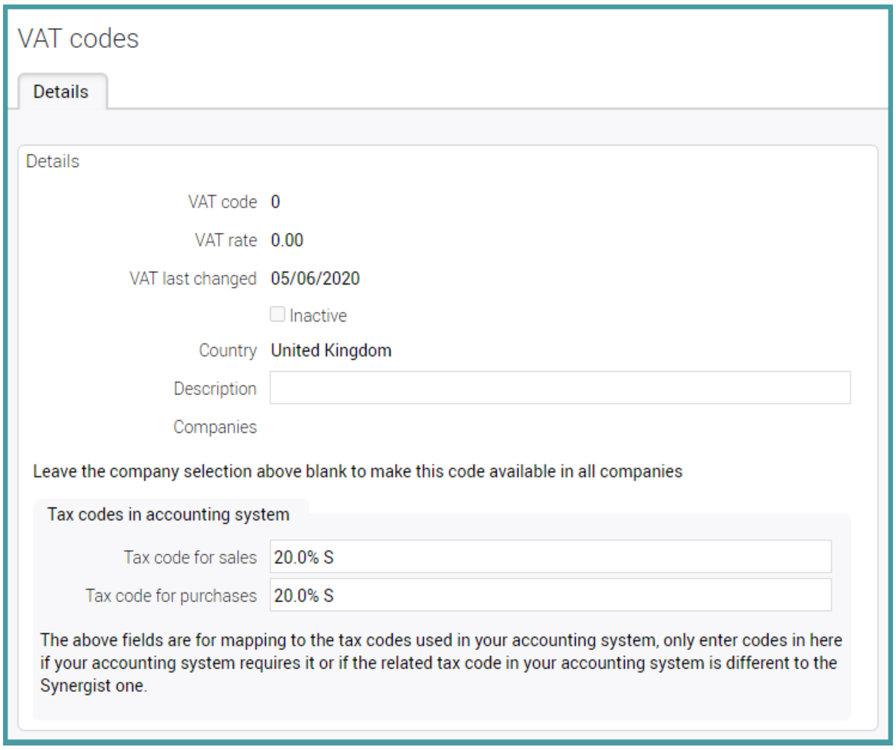


Reduced editing of VAT code 0 (zero) record

On account that 'VAT code 0' is a system default, the following fields and tick boxes in the 'VAT code 0' record have been made non-editable:

- VAT rate
- Inactive (tick box)
- Country
- Companies

This has been done to protect VAT code 0 (zero).
It is never appropriate to change the VAT rate of this standard code.



All field exports from File maintenance

To assist and simplify making comparisons between the settings of multiple companies, an additional function has been added that exports all the settings values into a CSV file.

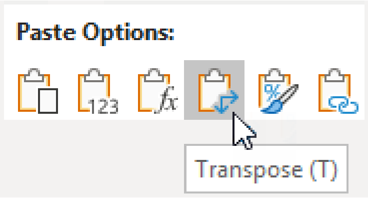
By using 'Transpose' features which are available in most spreadsheets, it is very easy to open the CSV in a spreadsheet to list all the fields vertically, with your companies cross tabbed.

Step 1: Create a spreadsheet using the 'Export all' function

- Navigate to Settings
- Click on Companies
- Select 1 or more companies from the Company setting list
- Click on the 'Actions' button and choose 'Export all fields'
- Save the newly created CSV file

Step 2: Open the CSV file in Excel or an alternative spreadsheet

- Copy or open the CSV using the spreadsheet
- Select all
- In Excel - Right mouse click in Row 1 Column A of the new sheet to reveal the following options…



Step 3: Compare field values between companies

In the example below, the data from two companies has been transposed into a new sheet.

- Column A = The names of all the exported fields
- Column B = The Synergist variable names for each field (Not required)
- Column C = Field values for the first company
- Column D = Field values for the second company

	A	B	C	D
1	Company no.	control_number	1	
2	Name	control_ourname	The Professional Services Company	Birmingham - all options
3	County	control_ourcounty		
4	Postcode	control_ourpostcode	W4 4N3	
5	Phone	control_ourphone	0207 895 1511	
6	Fax	control_ourfax	0207 975 3404	
7	Archived/inactive	control_archive	N	N
8	Training company	control_trainingcompany	N	N
9	Address	control_ouraddress2	Baghdads	
10	Wip control acct 1	control_wipcontrolacct1	8100	
11	Vat control sales	control_vatcontrolsales	050-2301-000	V100S
12	Vat control purchases	control_vatcontrolpurchases	050-2302-000	V100P

To highlight differences between the two sets of data, use Excel code by adding this function to every row in column G:

=IF(C2<>D2,"Different","")

Column G in the table below lists all the instances where the data is different between the two companies.

	A	B	C	D	E	F	G	H
1	Company no.	control_number	1	2			Different	
2	Name	control_ourname	The Professional Services Company	Birmingham - all options				
3	County	control_ourcounty					Different	
4	Postcode	control_ourpostcode	W4 4N3				Different	
5	Phone	control_ourphone	0207 895 1511				Different	
6	Fax	control_ourfax	0207 975 3404					
7	Archived/inactive	control_archive	N	N				
8	Training company	control_trainingcompany	N	N			Different	
9	Address	control_ouraddress2	Baghdads				Different	
10	Wip control acct 1	control_wipcontrolacct1	8100				Different	
11	Vat control sales	control_vatcontrolsales	050-2301-000	V100S			Different	
12	Vat control purchases	control_vatcontrolpurchases	050-2302-000	V100P				

API DEVELOPMENT

Support supplier contacts in API

CRUD support added for supplier contacts