synergist®

Version 12.1 - Release Notes

Synergist Browser Interface

[Intentionally blank page]

Contents

Synergist v12.1 release

Overview

The Synergist 12.1 includes enhancements to existing features as well as new areas of functionality. Interface behavior changes have also been made to improve usability based on user feedback.

Please note: These release notes relate to the Synergist browser interface only. If you have an on premise Synergist system and wish to see release notes for the desktop interface please click here

User interface

The Synergist browser UI went through some major changes for the v12.0 upgrade. Since then we have made some additional improvements

Opening tabs

When opening a main new tab, previously Synergist would simply open the new tab at the end of the existing tabs. This could easily result in tabs that are related to one another (e.g. the Client list, and an open client record) being separated by other tabs.

The opening of tabs will now follow these new rules:

1. If the tab is opened from the main menu – open the new tab at the end of open tabs (no change)

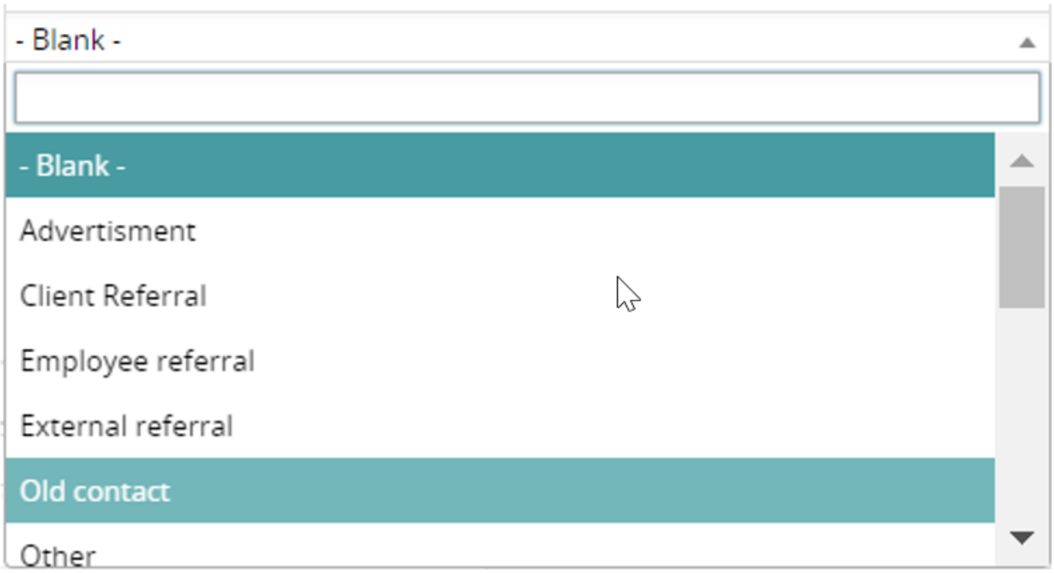
2. If a tab is being opened from a list or a record the new tab is opened immediately to the right of the currently open tab. This has the advantage of keeping related tabs together.

3. If a 'child tab' is opened – on closing the tab the 'parent' would be opened. E.g. if the client list is opened and a client card opened from it, on closing the client card the client list will re-open.

4. It is now possible to manually reorder the tabs with drag and drop

New drop down lists

A more standard version of the 'select' tool (drop down list) is now used in Synergist. The space bar will open the list (or you can, of course, click it with a mouse). The search at the top is then available. Typing into this box will dynamically filter the list. The up and down arrows can be used to select an item from the list.



Scheduling – calendar bookings

Requisitions

The browser calendar now supports a new type of requisition feature. Requisitions are a special type of Activity record that a user can raise to request some work be allocated via the Calendar Bookings system. The user can suggest the number of hours, the resource and the charge code for the booking. However, in a requisition these are just the preferred values. The person making the bookings can override these defaults and make a decision based on the resources available at the time.

Note: New style requisitions are not available in the desktop version

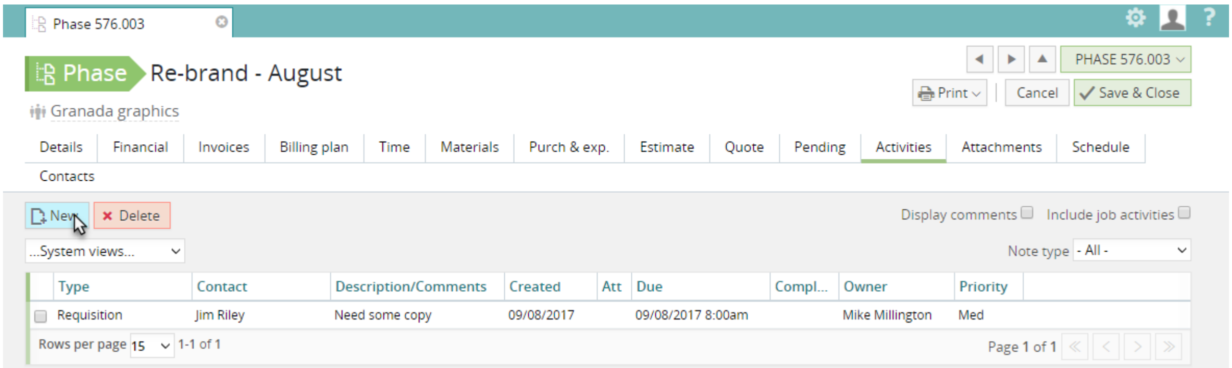
Estimating

The Synergist Calendar bookings module, until now, has relied on jobs being estimated prior to allocating work to staff. This standard way of working is still fully supported and is the most rigorous way of organizing the planning of resource allocation. However, there are some situations where a Synergist user might wish to book a staff resource into the calendar without first creating an estimate. The new requisition system allows for this scenario.

When processing a requisition the system will automatically allocate the booking to an estimate if it already exists. Otherwise it will simply create a zero hour estimate, for the selected charge code, at the point of booking the requisition into the calendar.

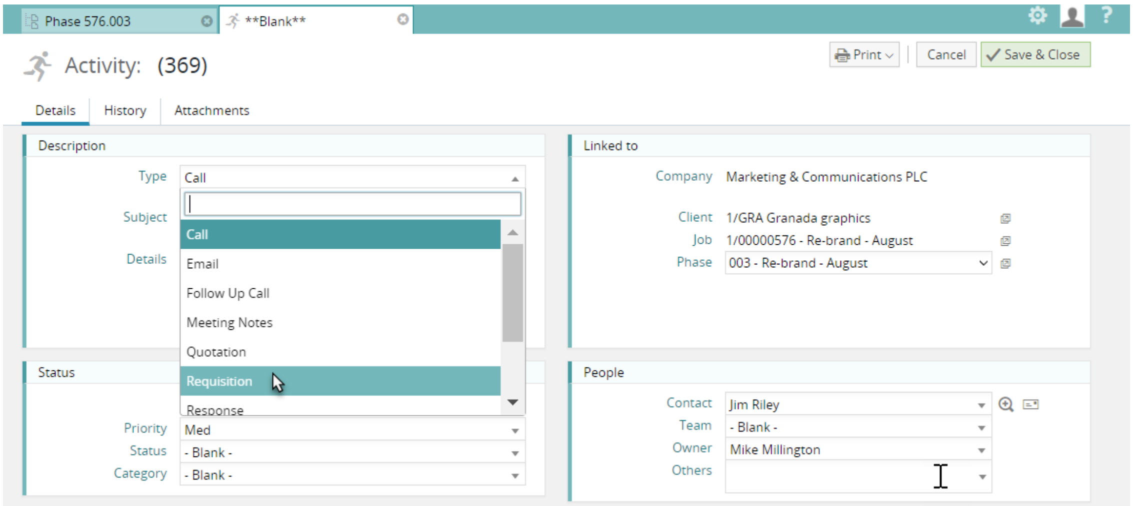
Creating a requisition

From within a job, or a phase of a job, a user can raise a requisition. This is done from the 'Activities' tab of a job or phase. Click 'New'

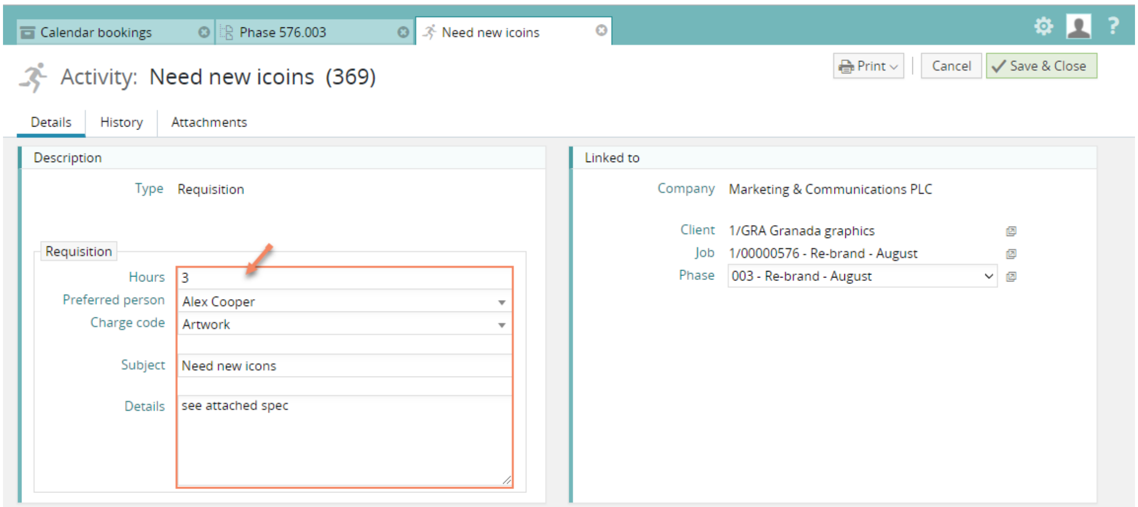


The requisition

Here is an example of a requisition. The only mandatory field is the Activity type (select 'Requisition').

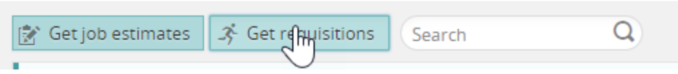


Once the user has specified this is a requisition activity, he/she can suggest the number of hours required, the preferred resource, charge code, the phase, and the stage from the phase schedule. It is also good practice to add a subject and some text in the details section. It's here the user might wish to specify exact work instructions – or attach relevant files.



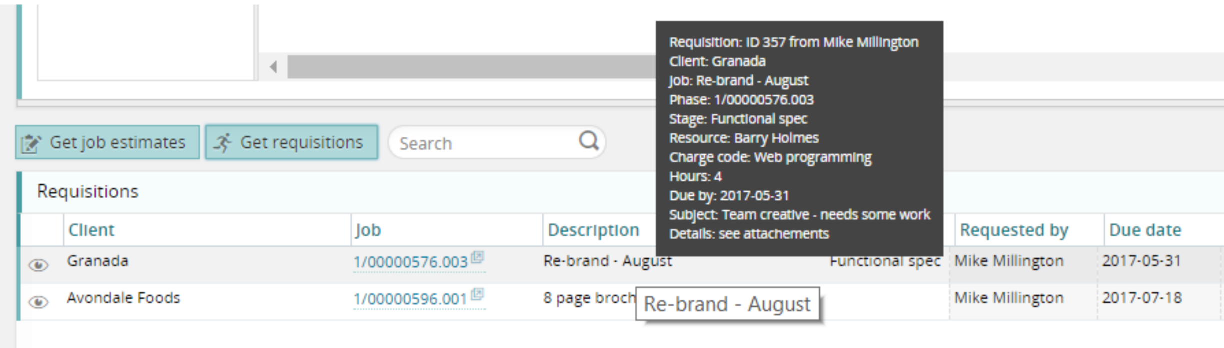
Booking a requisition

In the calendar booking screen a new button is now available for all staff who have the access rights to make bookings.

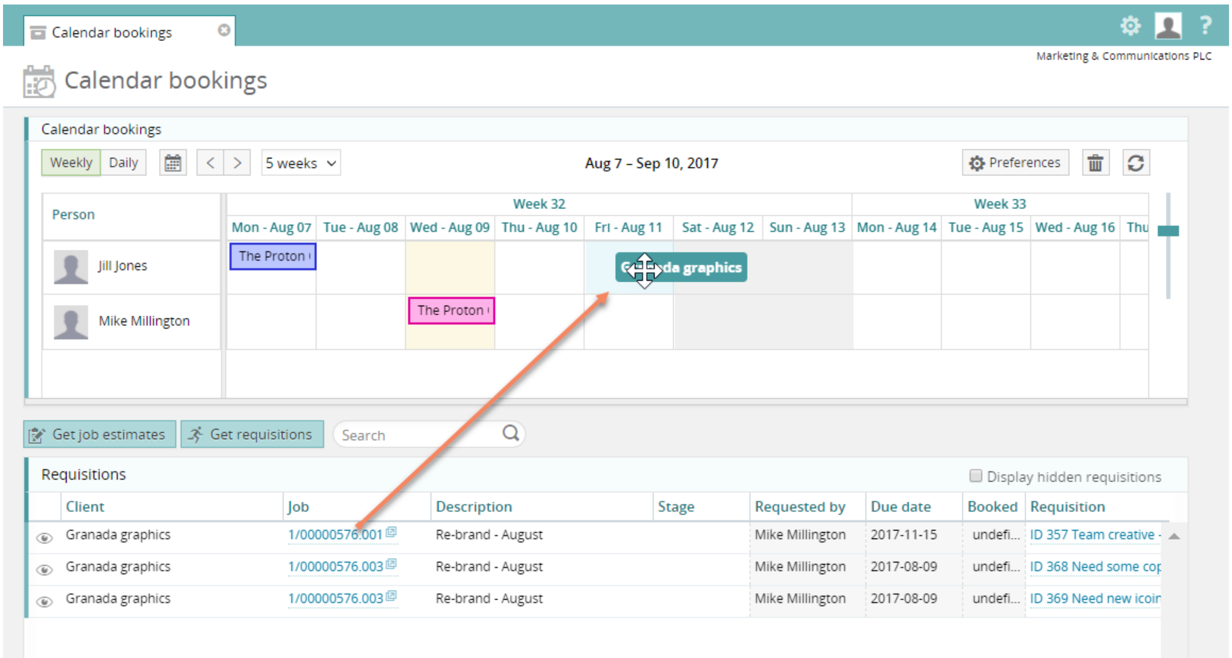


Requisition list

Clicking ‘Get requisitions’ will open a list of all the open requisitions. Hovering the mouse cursor over any of the requisitions will show full details of the requisition. From this list it is also possible to open a requisition (in a new tab). Once the user is ready to make a booking based on the request he/she will drag the requisition to the calendar.

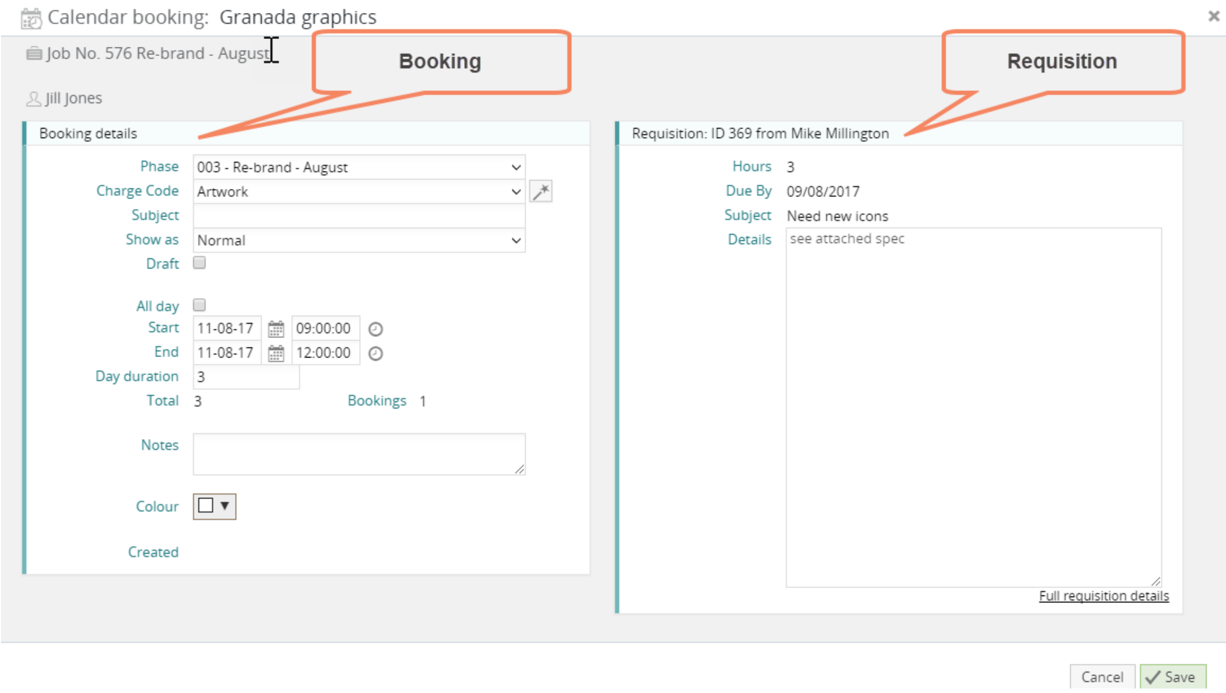


Dragging a requisition to the calendar



Booking input form

At this point the booking input form opens with the requisition shown on the panel on the right. To the left is a panel that comprises of the booking itself. The hours requested, the charge code, phase and stage are all copied over from the requisition if they have been specified there. The user can at this point change any of this – e.g. reducing the number of hours, or even changing the phase / stage that the booking will be linked to. On clicking 'Save' the booking is made.

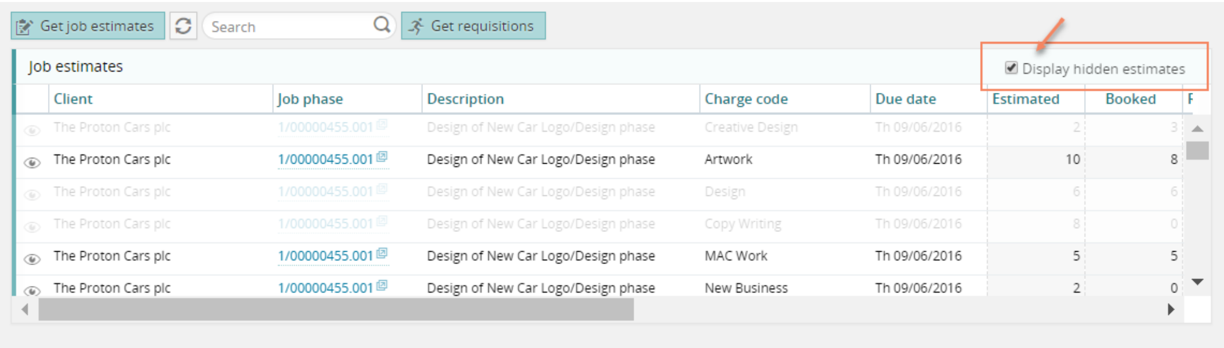


Hiding/showing requisitions.

A requisition will disappear from the list of open requisitions once the requisition is 'completed' or the related job/phase is closed. If you wish to hide requisitions that are open – but which you have already booked, click the 'eye' icon on the far left of the list. This will hide the requisition (on the next refresh). To bring it back simply click the 'Display hidden requisitions' checkbox.

Hiding/showing estimates

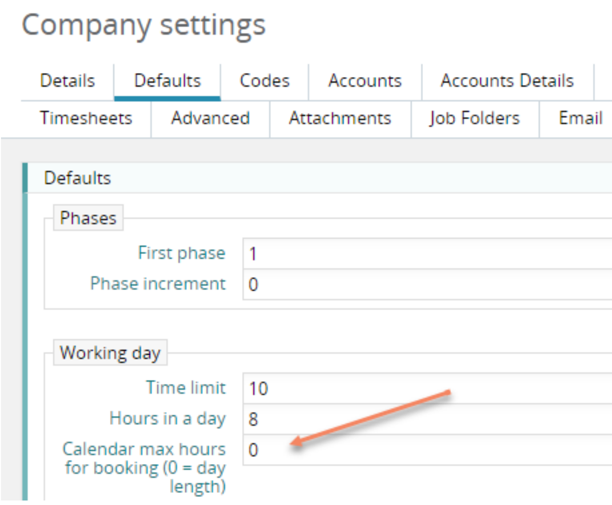
The browser calendar now supports hiding and showing previously booked items. The resource manager can make a booking and then decide to hide this item from the unallocated estimate list. Later he/she may wish to bring this item back on to the list if additional bookings are required. This is done by checking the 'display hidden estimates' checkbox



Shift working

New features have been added to the browser calendar to support shift working. Note: these features are not available in desktop version.

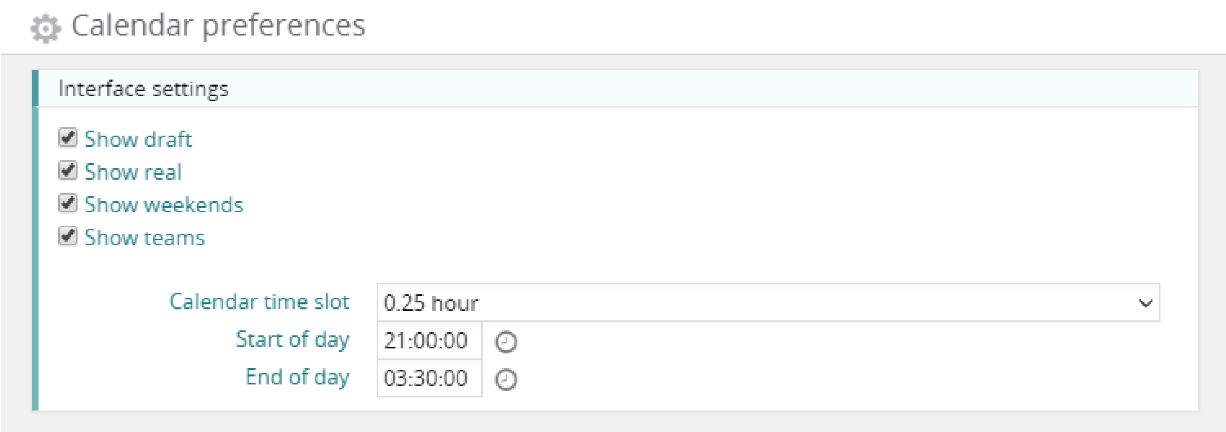
- Users booking into the calendar can choose their own start – end time for the current view of the calendar. This range can be outside the 'Normal' hours for the company.
- Ability to book outside the range of the normal company hours
- A maximum booking size (in hours) when creating a new booking
  - All-day bookings are no longer created automatically if this setting is selected.
  - Set the maximum booking length in company settings



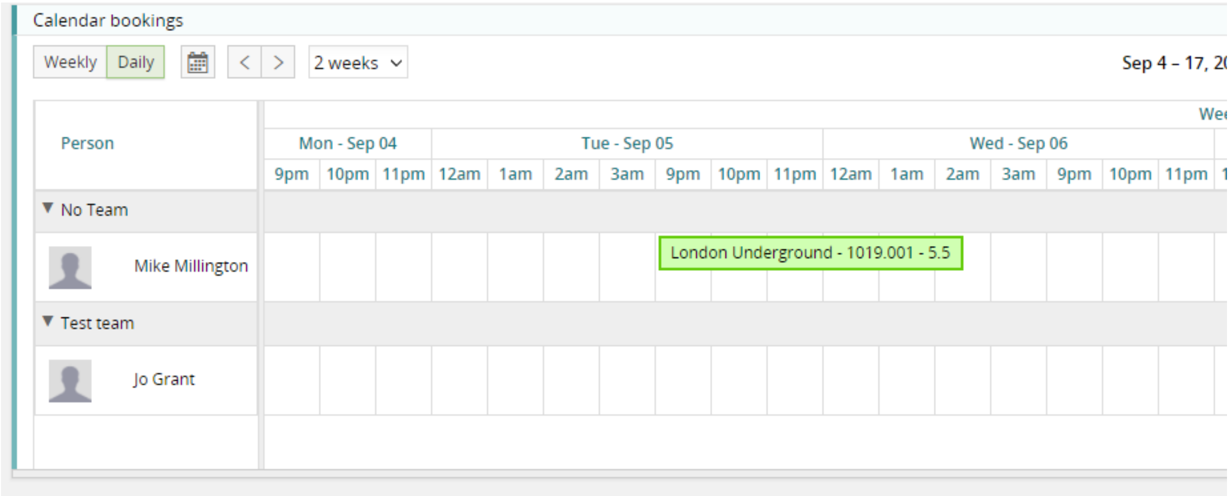
- Ability to make a booking that crosses midnight

This feature is for users who need to book work to shift workers. You can even create a booking that crosses midnight.

First the traffic manager will need to set his view to support a shift work view. In this case the day starts at 9pm and finishes at 3:30am

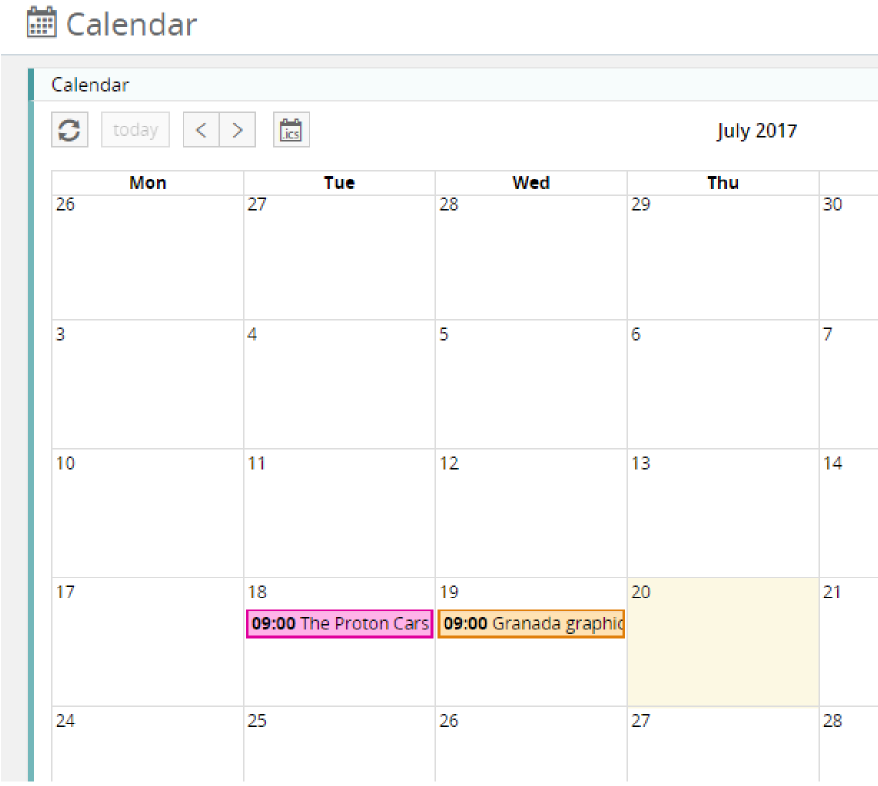


A booking can now be added to the calendar that crosses this midnight boundary.



MyCalendar – colours

The staff calendar (MyCalendar module) now displays the same colour coding that is used in the Calendar bookings module.



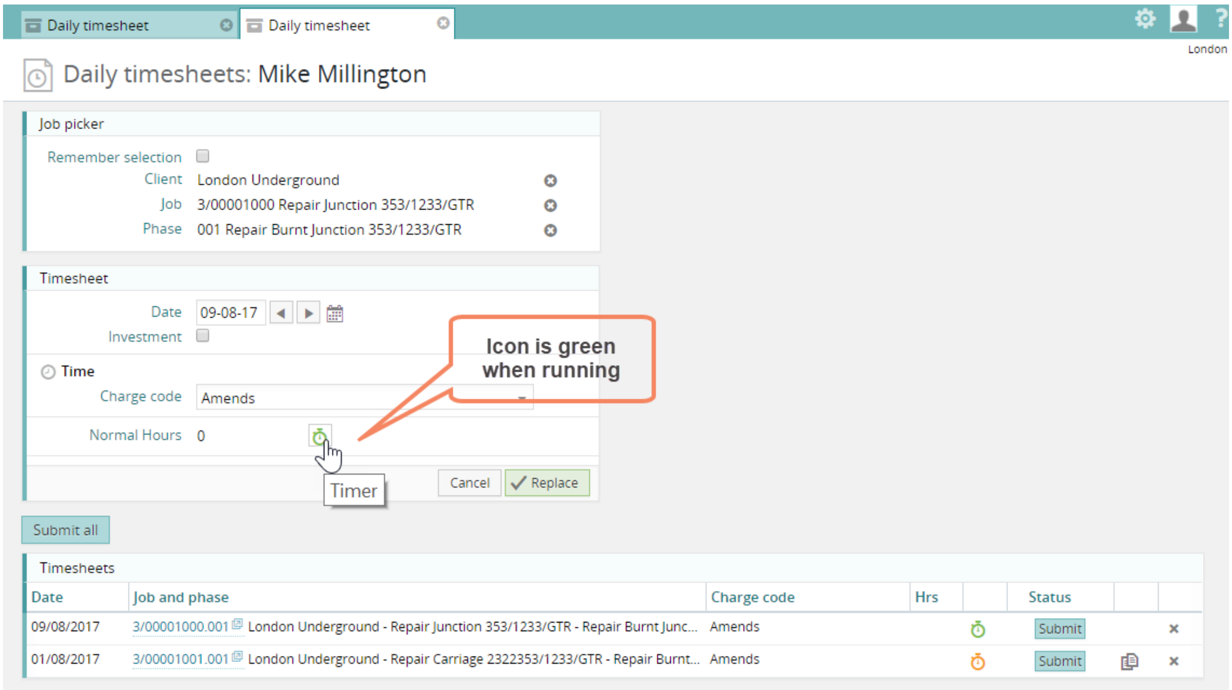
Time & Expenses

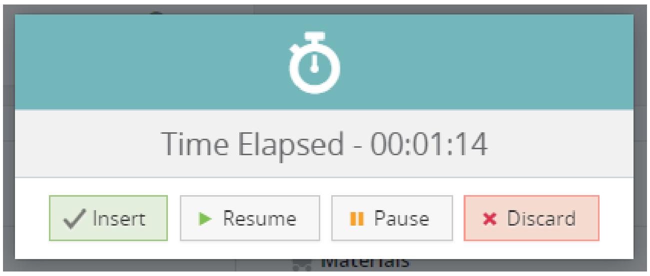
Daily timesheet – timer

The timer feature that was previously only available in the weekly timesheet view is now available for daily timesheets

Starting the timer

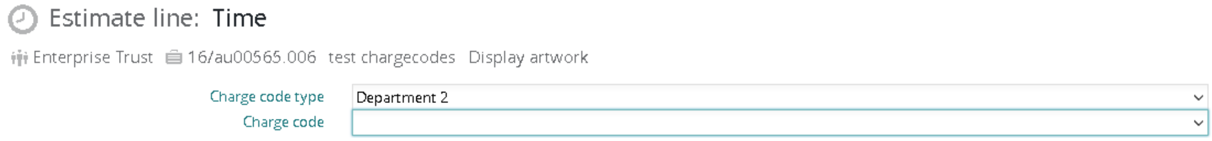
You can start a timer on an existing timesheet or on creating a new one. Once the timer starts you can either leave it open on the tab – or close it and open it later. The timer icon is green when it is running and amber when it is paused. You can only start a timer for the current day (for obvious reasons). If a timer runs overnight it expires and you will need to discard it.





Charge code type filter

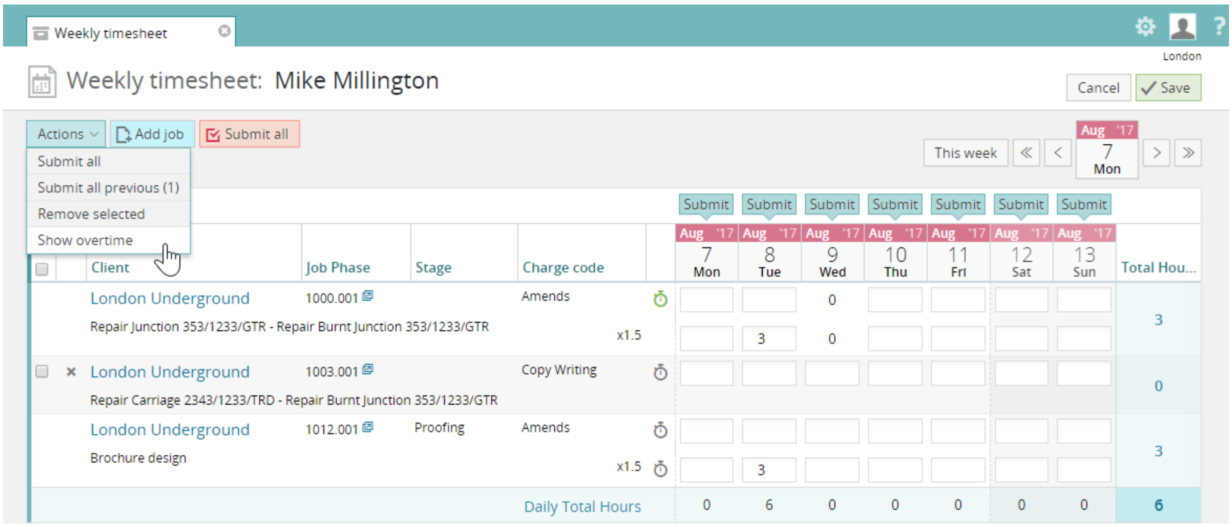
If you have set up charge code types and allocated these to your charge codes, you can now filter the possible charge codes by their related type.



Option to hide overtime

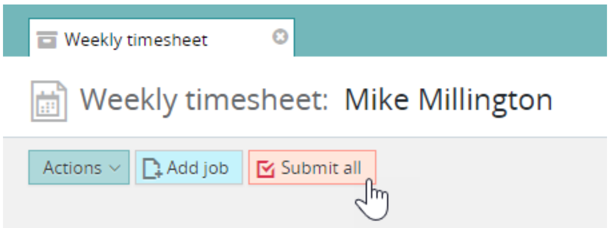
Weekly timesheet

This feature hides/shows the overtime rows – but leaving in place any overtime rows that already has any overtime values entered. By using this feature the user can temporarily turn on the overtime feature, add the overtime, and then hide the other blank overtime fields.



Post / Submit all button

The 'submit all' option is now clearly displayed on its own button. Previously this was on the actions button.

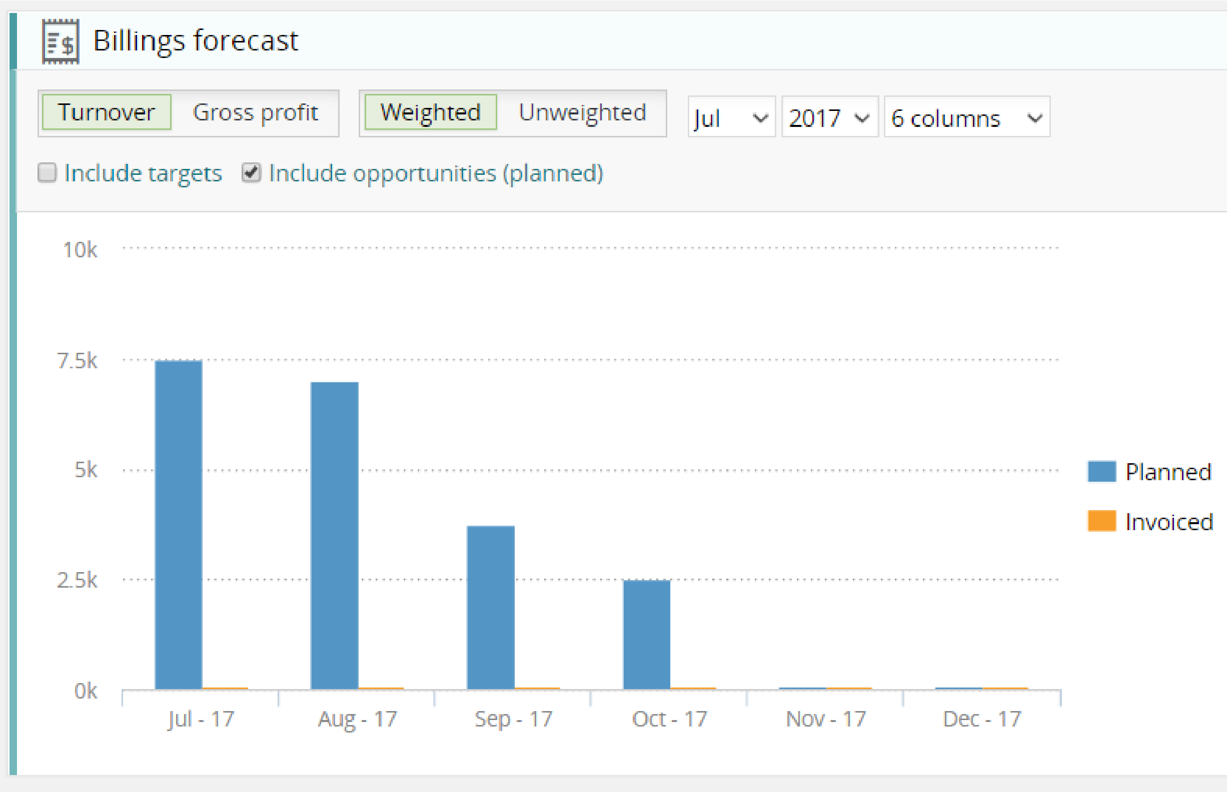


Dashboards:

Billings forecast – opportunities

You can now include or exclude opportunities from this chart.

The planned values (billing plans) can also be displayed by their weighted value. The weighted value is based on the % weighted value shown on the job details / sales info section of the job/opportunity. However, there is also an optional weighting override feature that can be applied to each billing plan entry. If this is being used the chart weights the billing plan entry by this weighting %.



My Team option – dashboard filter

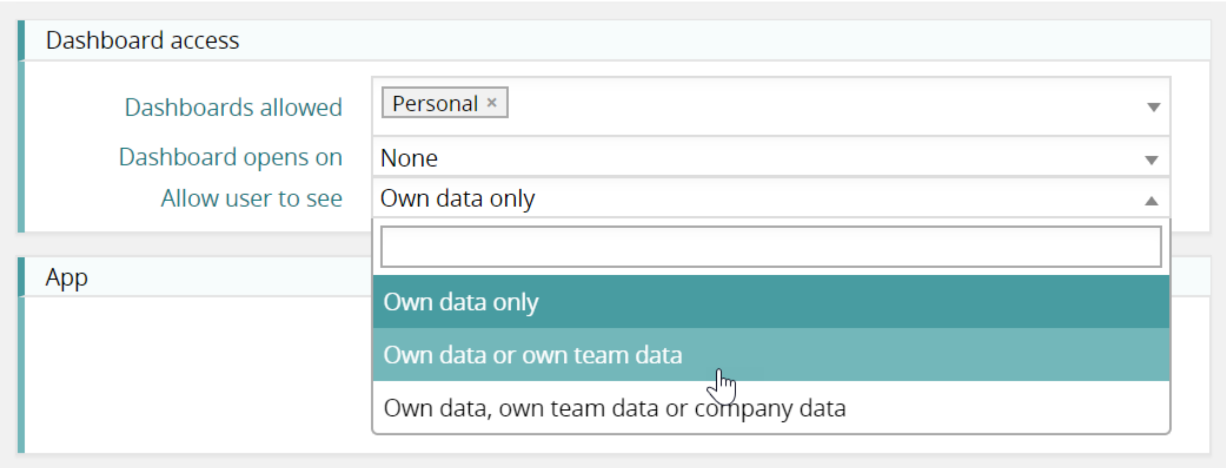
In addition to 'all' and 'current user' options, dashboards can now be filtered by 'My Team'.

Dashboards supported – and the type of team used

- Pipeline - job team
- Billing forecast - job team
- Targets and orders - Handlers filtered by their user team
- Hours sold - Staff filtered by their user team
- Financial summary - job team
- Staff utilization - already has a team view. However, team filter still needed by staff team to only show one team.
- Top clients - job team

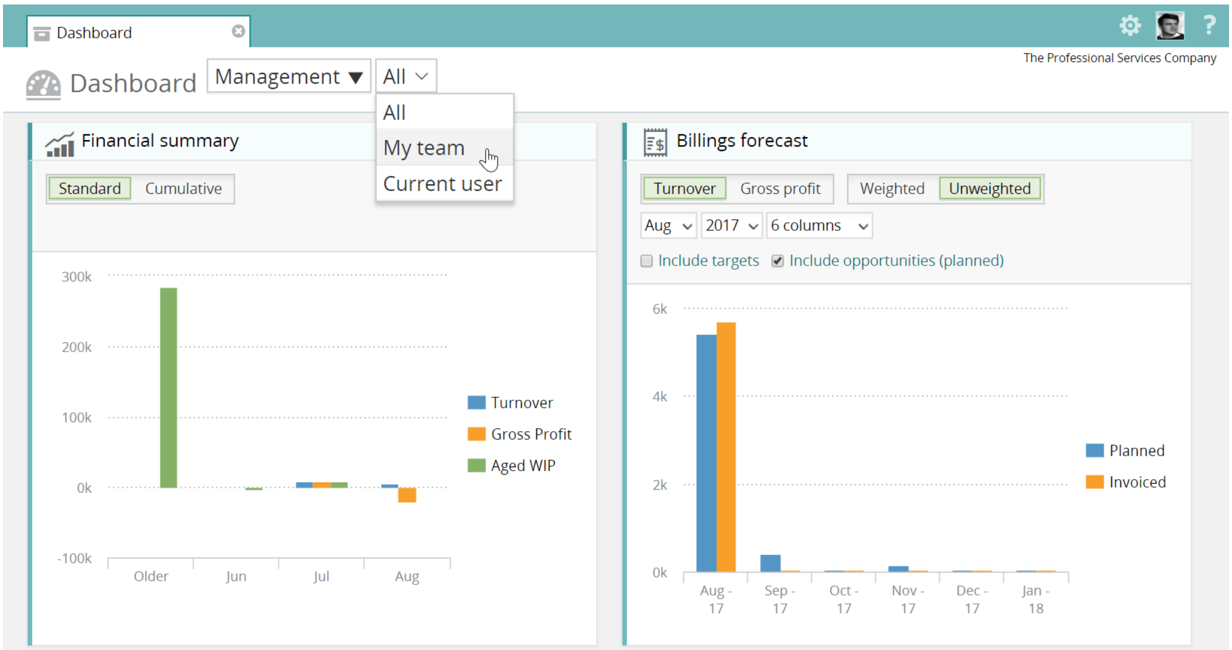
Option in user table

By default users do not have access to team data in their dashboards. To give a user access to this feature go to File Maintenance / Users / Access tab of the user record.



Filtering the dashboard by team

Select 'My Team' from the drop down menu



Quoting & estimating

Quick estimate

The quick estimate feature has been enhanced for the browser:

Staff columns added

This enables the user to see at a glance when a charge code has been estimated and allocated to a specific member of staff

Staff selector

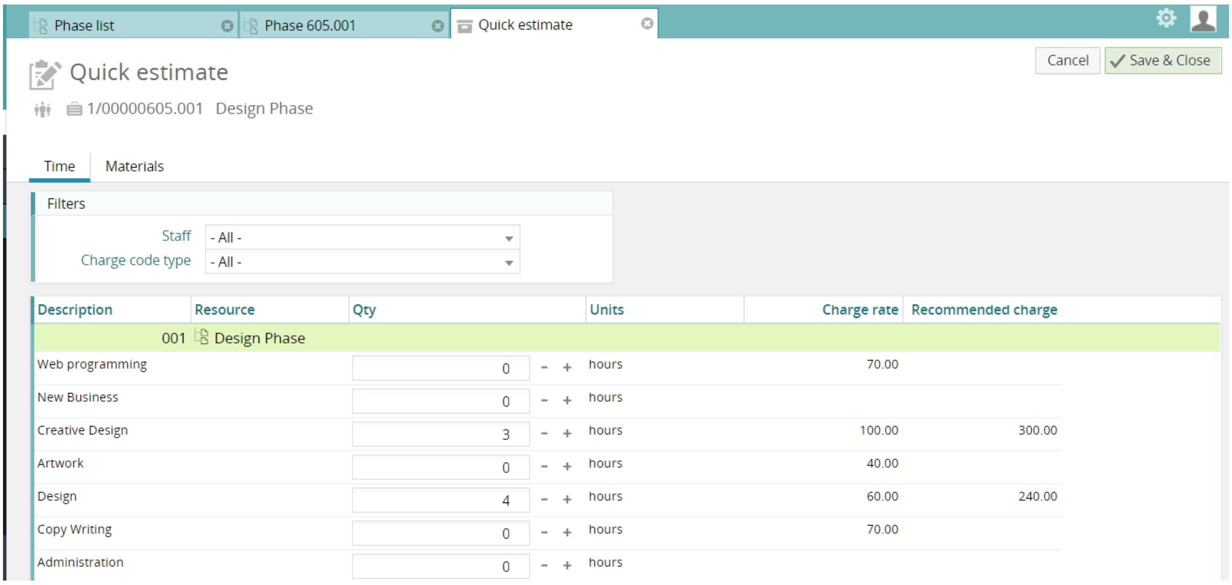
By selecting a member of staff in the staff drop down list you can allocate work to a specific member of staff.

Multi-stage view available

This is required for jobs using stages (2 tier)

Job level estimating

Ability to create a Quick estimate at the job level (previously you had to be on a phase)

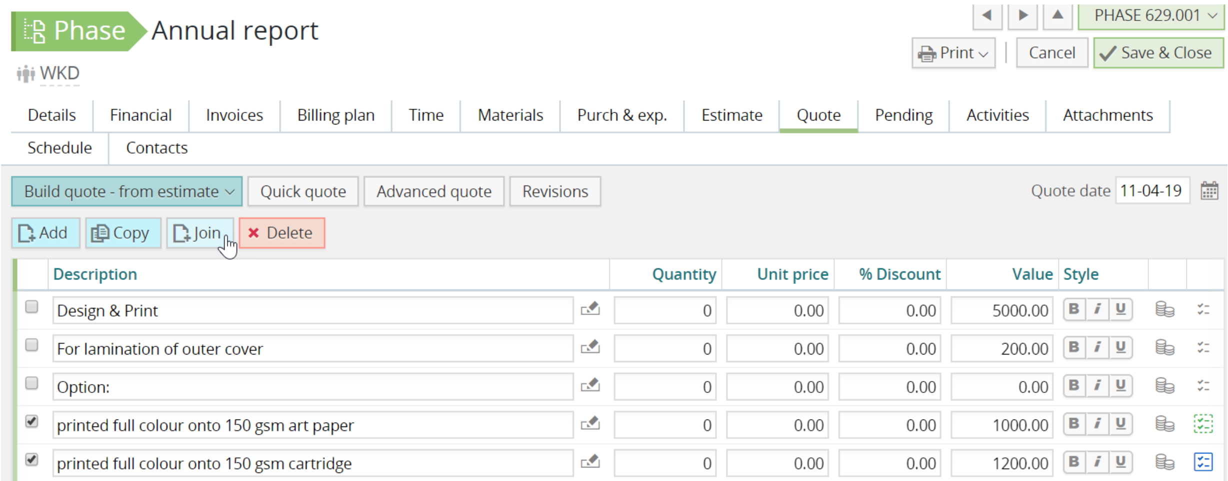


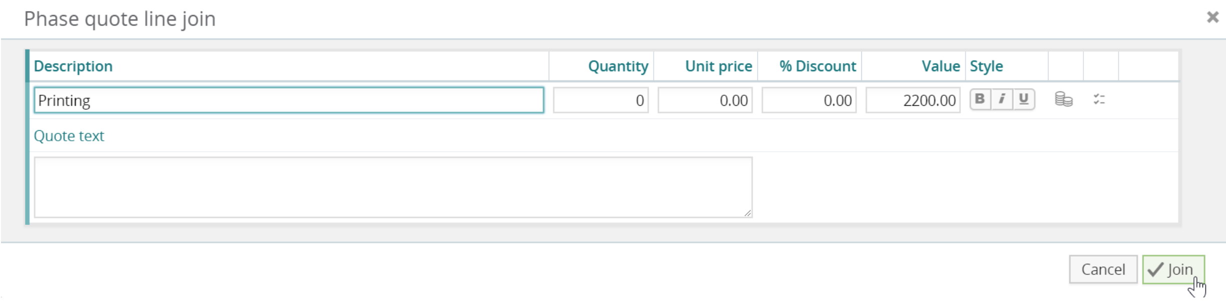
Hover text in estimate tab

If you hover over the icons on the estimate you will see the supplier name / staff name associated with the estimate line.

Quote lines – new features

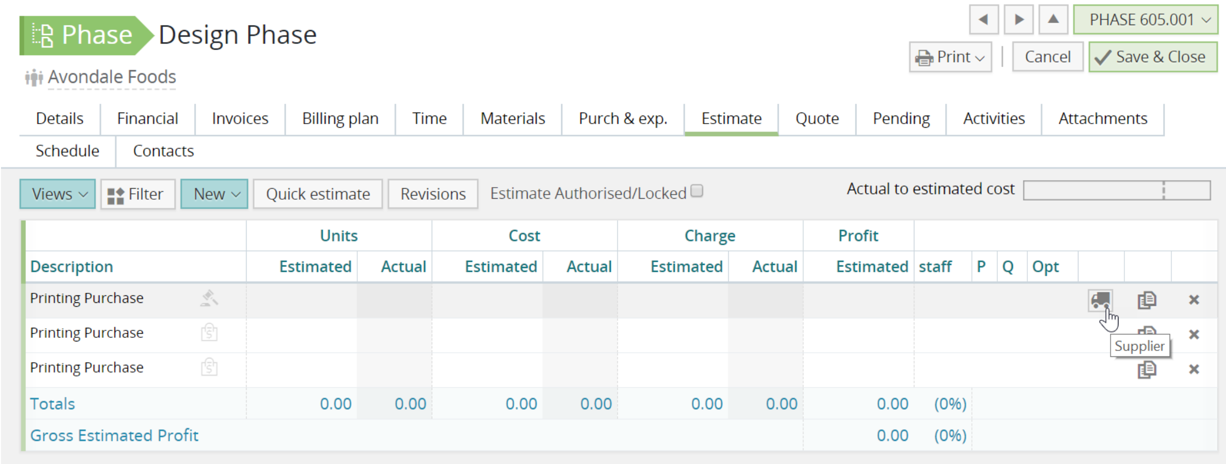
When building a quote you can now join lines to create a single line. You can also duplicate a line by using the 'copy' feature.





Selecting suppliers for a tender

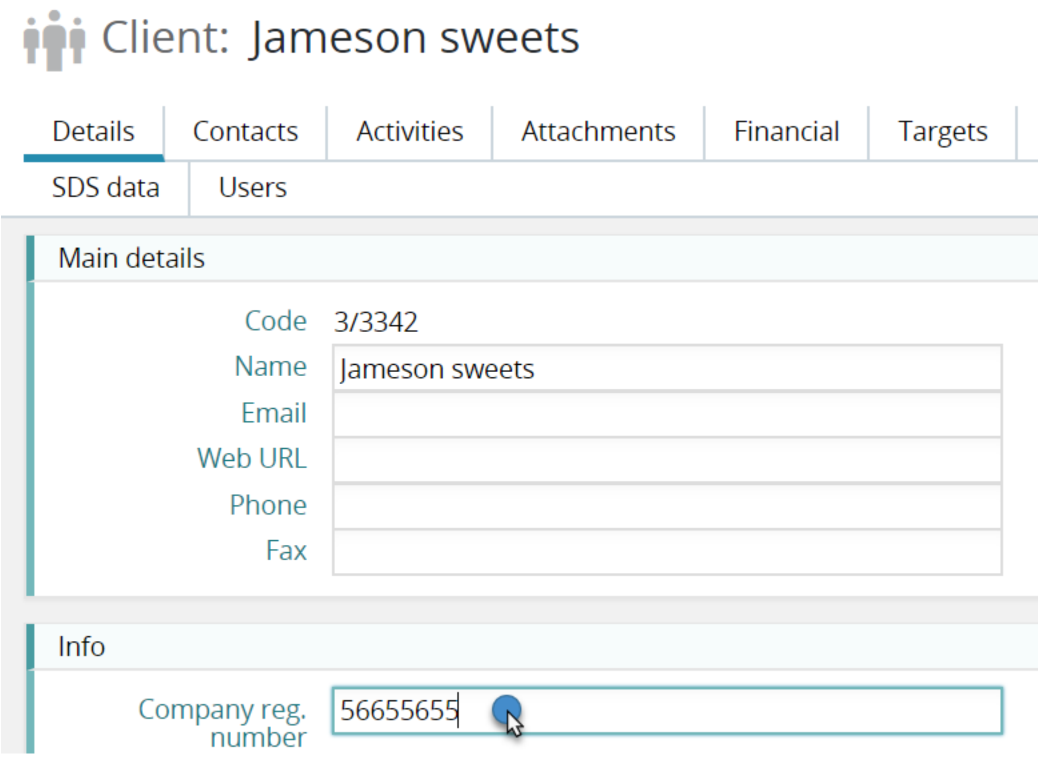
Previously only one supplier at a time could be selected. Now multiple suppliers can be selected. Click the truck icon…



Clients & jobs

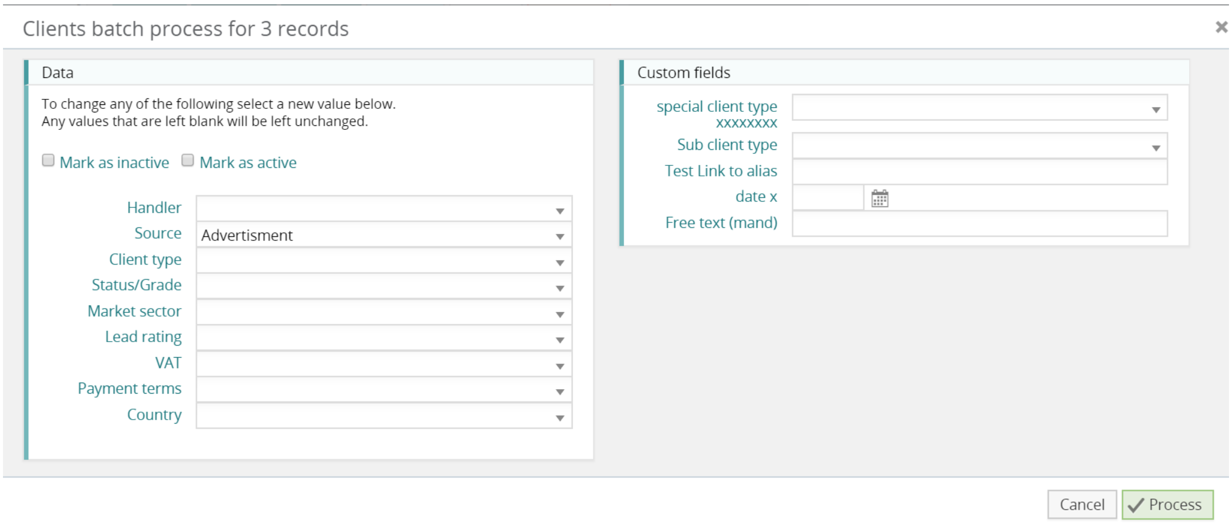
Companies registration number

This is now available on the client detail tab



Client batch update

If you select a number of clients from the main list and then click 'Batch update' from the Actions menu, you can apply changes to the selected records. Anything selected on this form will be applied to the selected client/organization records.

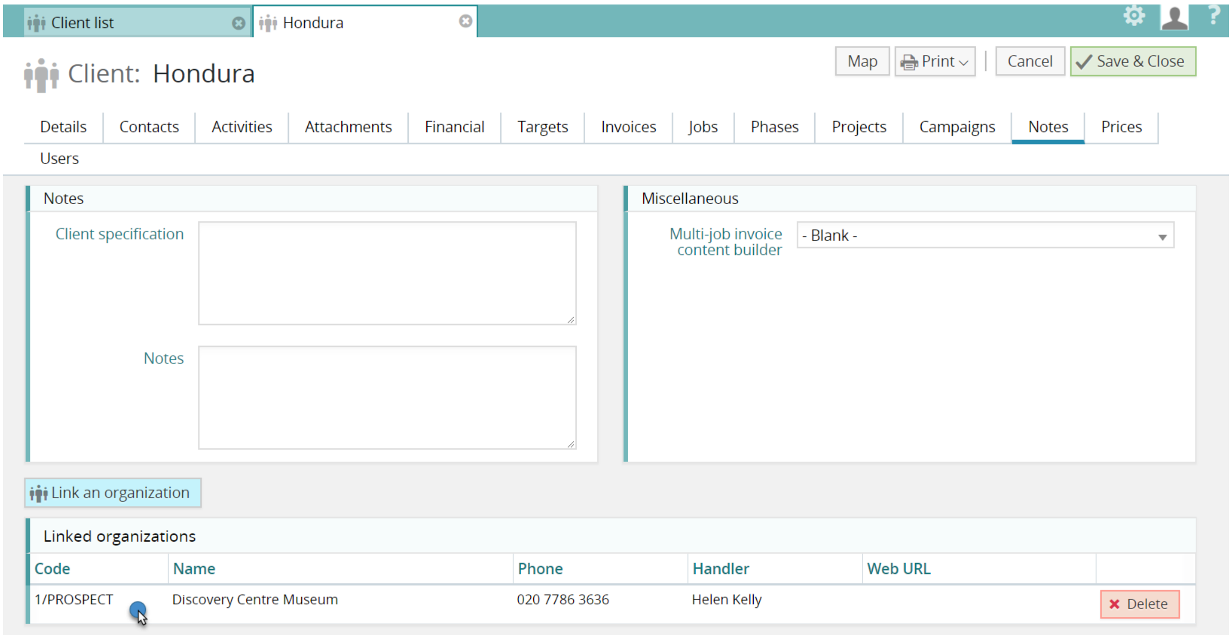


Linked clients

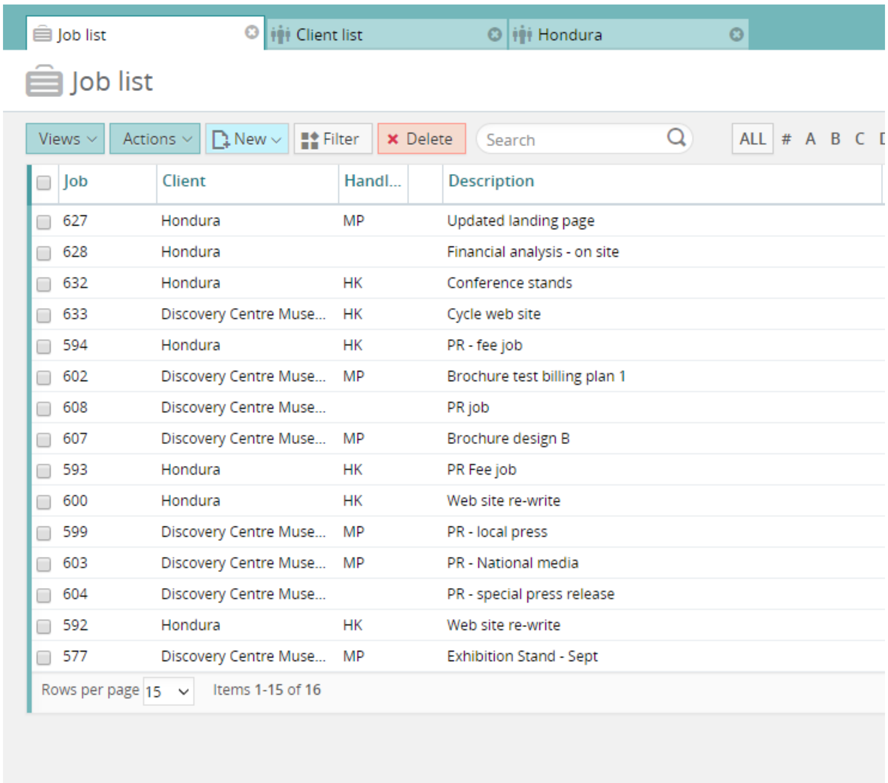
Under the 'Notes' tab of a client the user can select a list of clients who are related to this specific client. For instance, one client may be a holding company for several other companies.

By listing the 'child' companies here, whenever you create a query for the parent company, the query will include data for all the child organizations.

e.g.

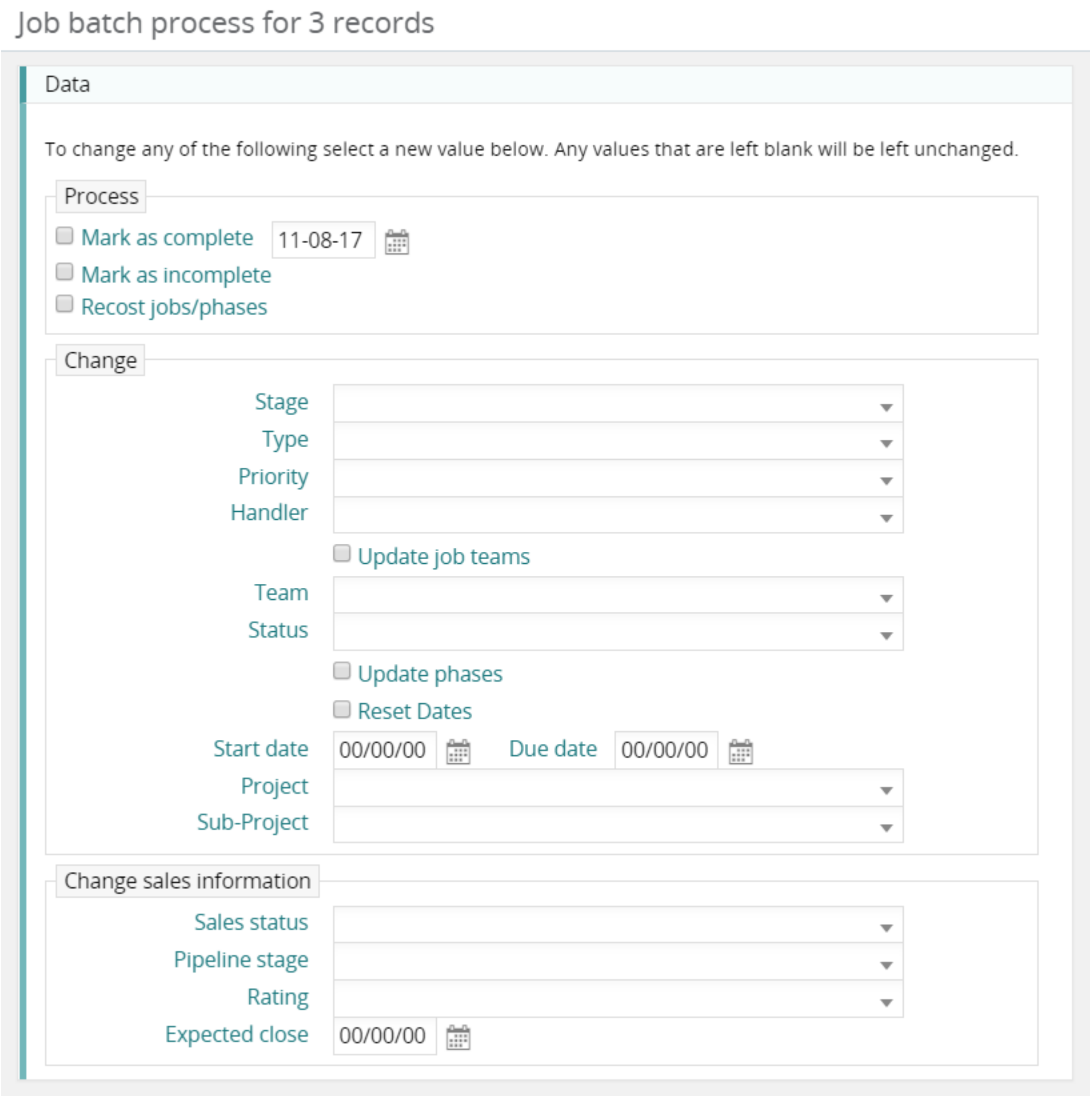


Job query for the company 'Hondura' returns jobs for both 'Hondura' and 'Discovery'



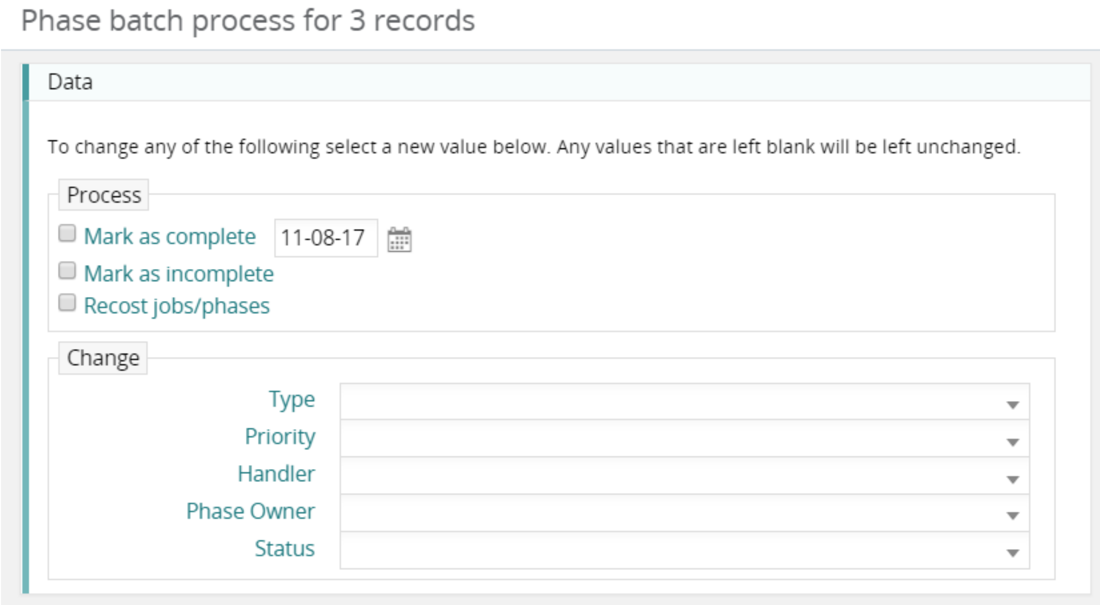
Job batch update

If you select a number of jobs / opportunities from the main list and then click ‘Batch update’ from the Actions menu, you can apply changes to the selected records. Anything selected on this form will be applied to the selected job / opportunity records.



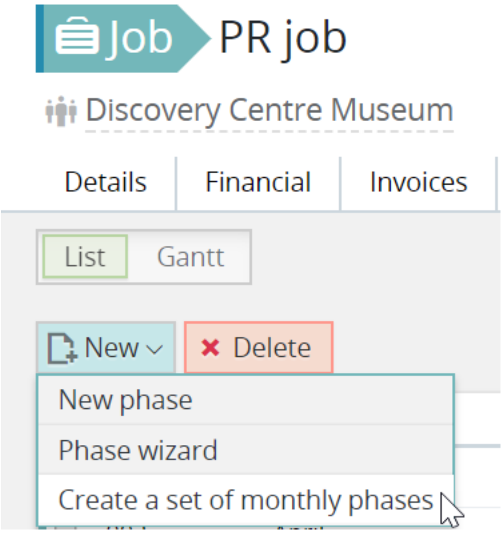
Phase batch update

If you select a number of phases from the main list and then click 'Batch update' from the Actions menu, you can apply changes to the selected records. Anything selected on this form will be applied to the selected phase records.

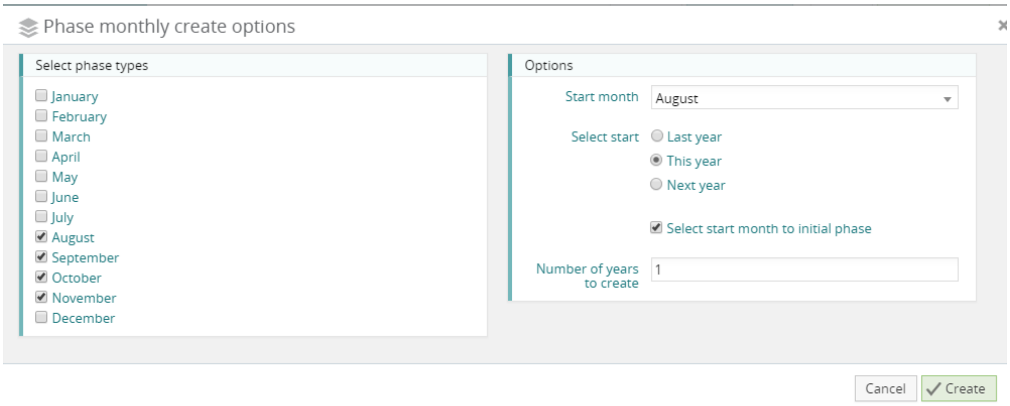


Create a set of monthly phases

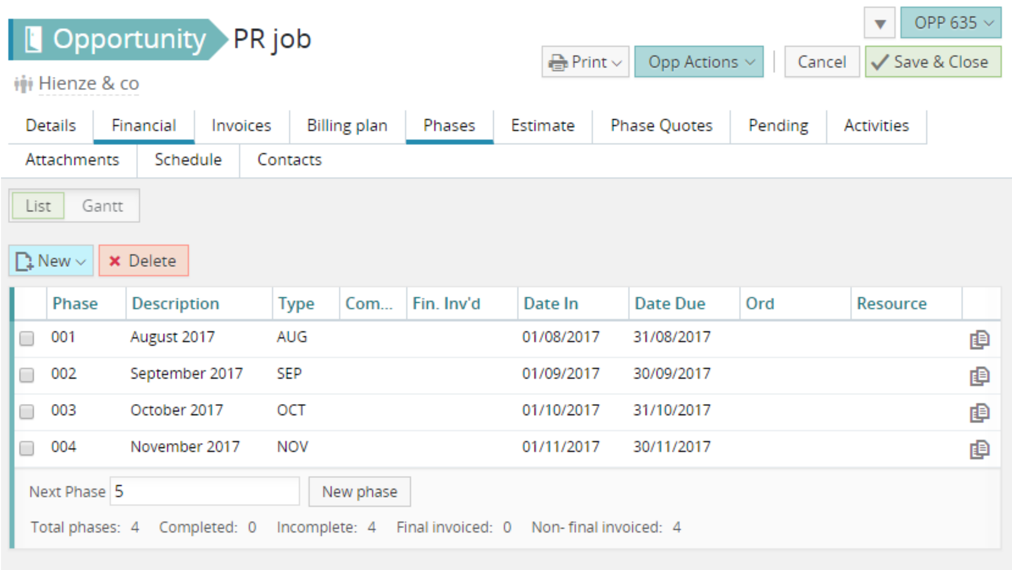
Typically this feature is used to create a set of phases for billing retainer type jobs. This is accessed from the 'New' button on the 'phases' tab of a job / opportunity.



The user then selects the months of the year required, the start month, the year it applies to etc. On clicking 'Create' the phases are created.

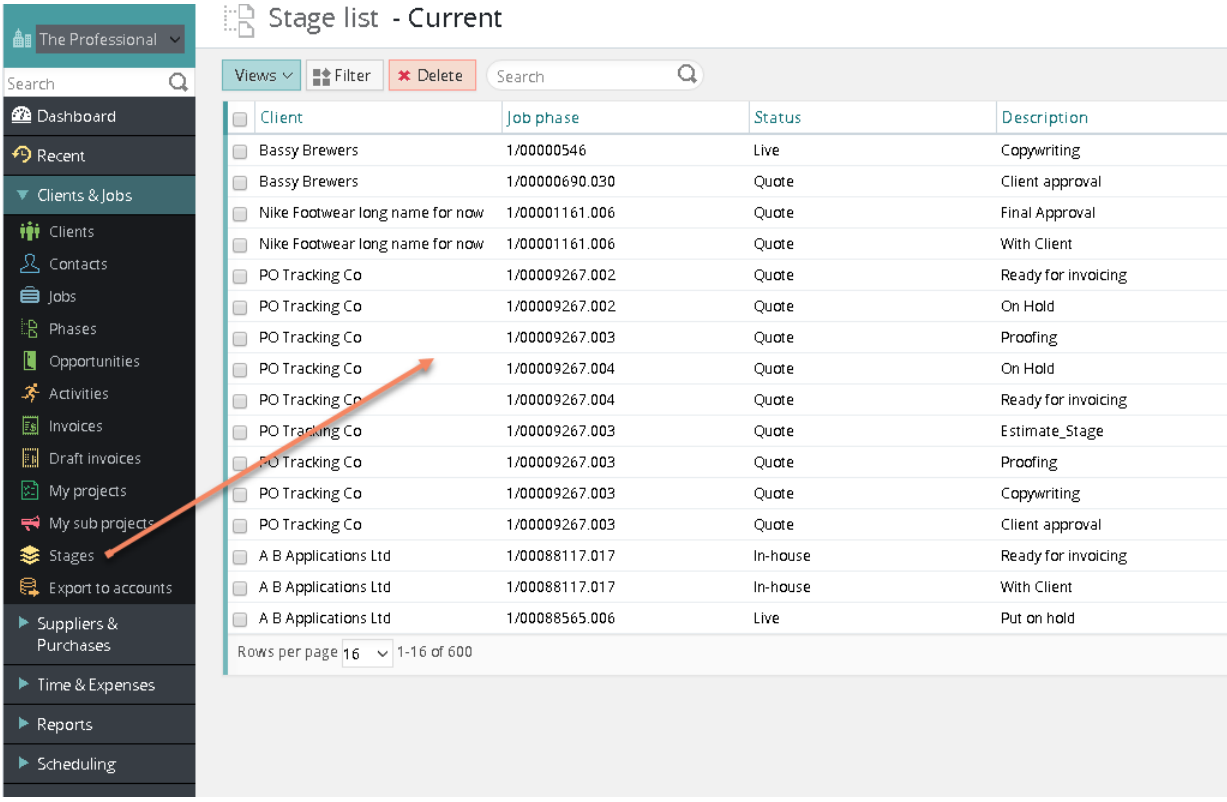


Resulting phases



Stages

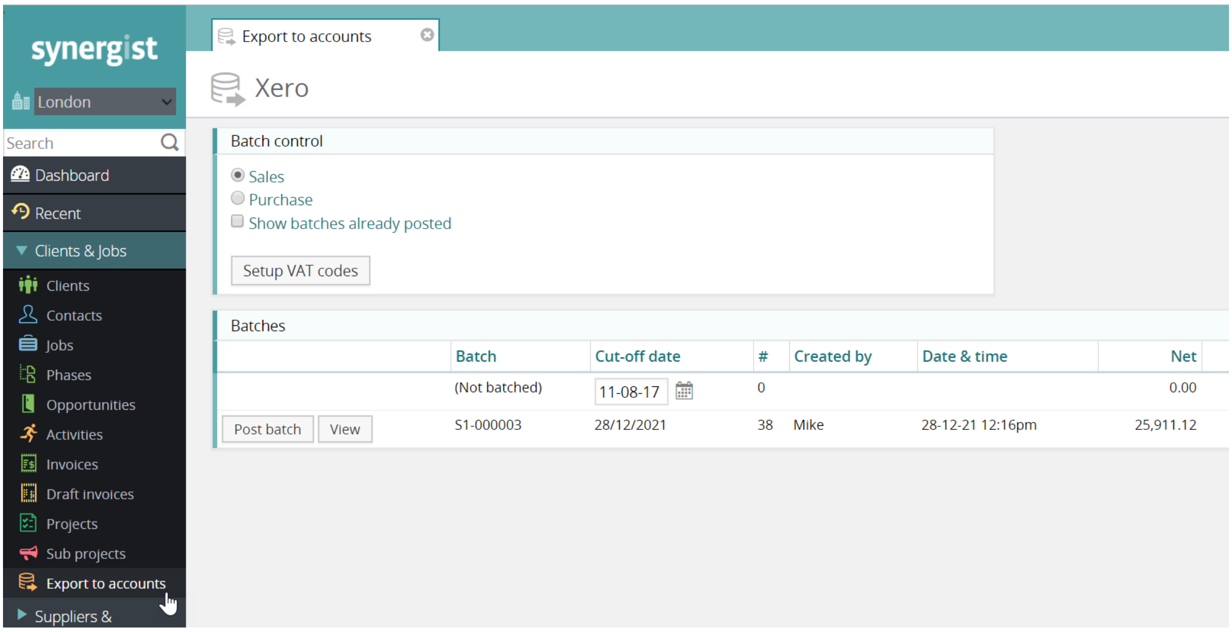
A list of stages are now available from the Clients & Jobs menu. Typically these are used to create another level of analysis under phases (2 tier jobs). This screen provides useful access to stages across multiple jobs



Accounts links

Posting to external accounts systems

For systems that are exclusively browser based (e.g. Synergist Cloud) it was previously necessary to install the Synergist Connect system in order to post transactions to a linked accounts system. We have now added the accounts posting module to the browser interface. From here users can create batches of Sales and/or Purchase transactions and then post these to an external accounts system.



Please note: For technical reasons links to 'Sage 50 Direct Interface' and 'Exchequer' will still require Synergist Connect / 4D client to carry out the actual posting procedure.

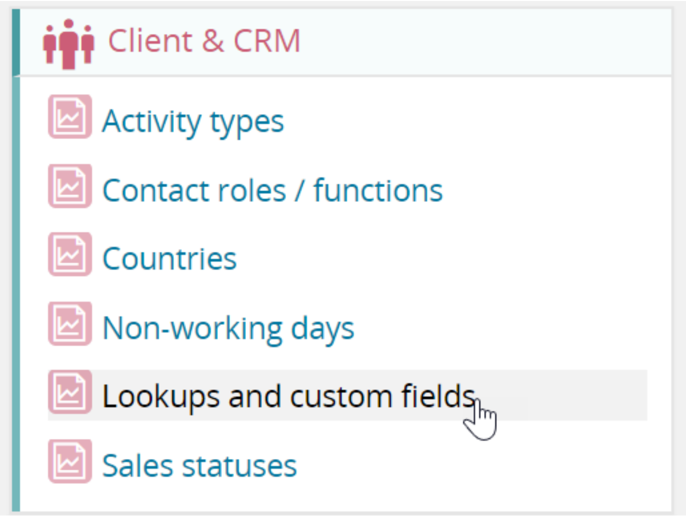
Sage 200 accounts link

Option added to exclude the export of the invoice due date from the export to Sage 200. This enables Sage to dictate the payment terms.

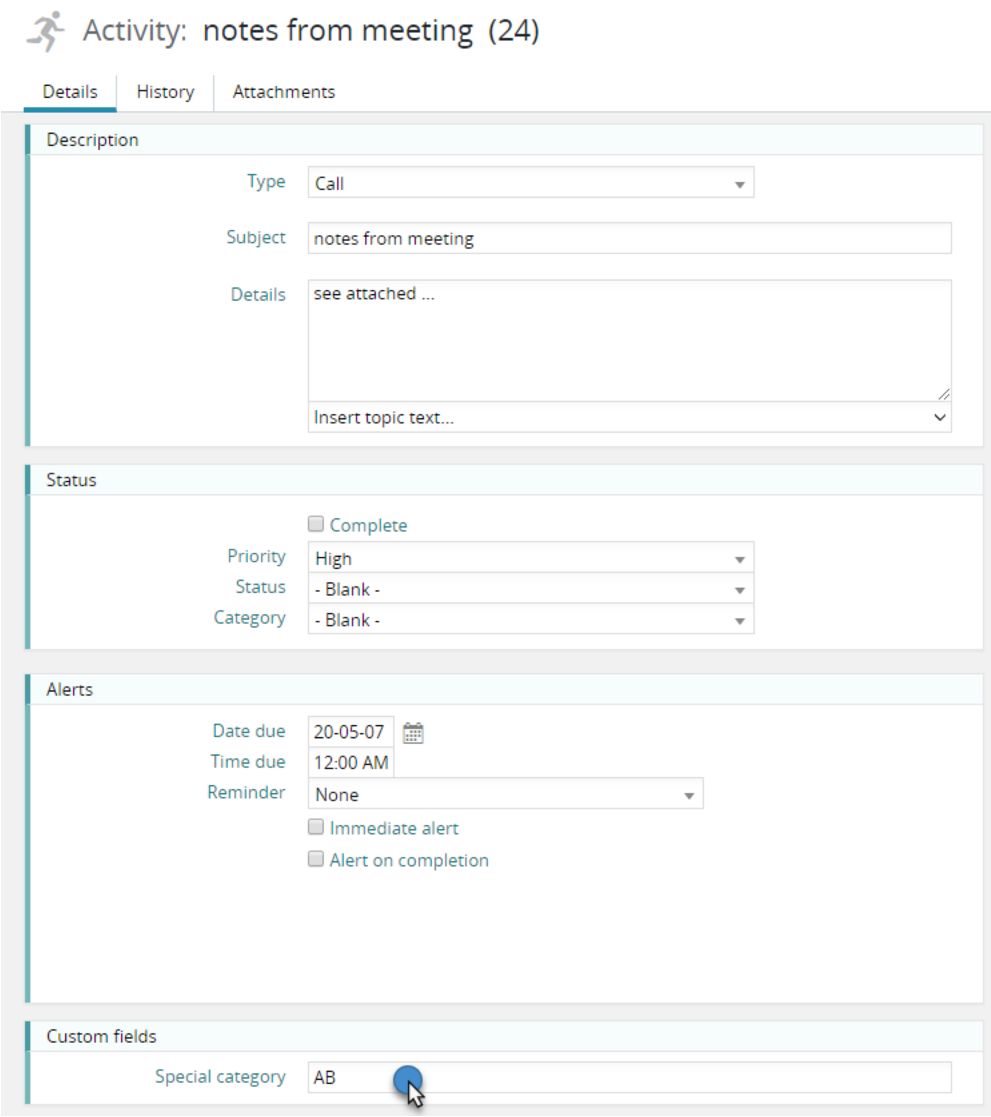
Activities

Custom fields

Custom fields are now supported for Activities. Custom fields are setup in file maintenance section:



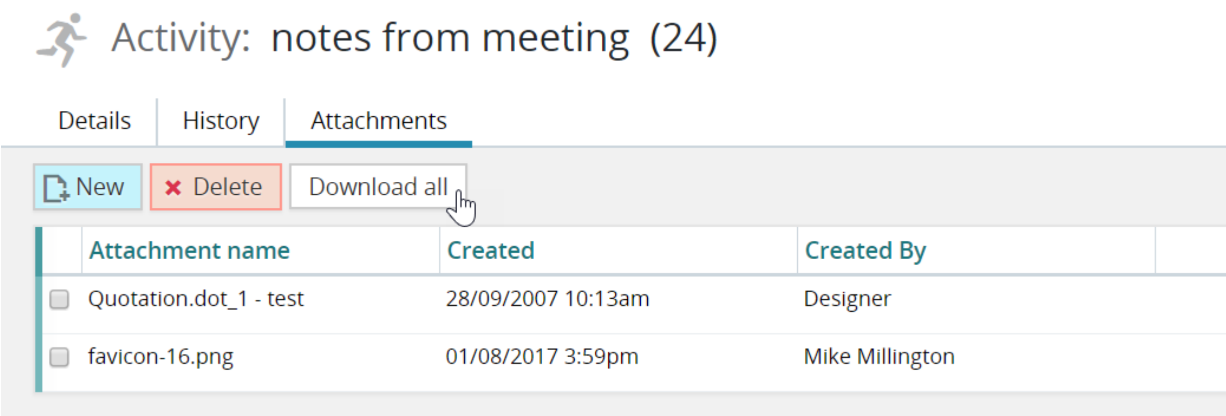
If custom fields have been added to an Activity they appear in a separate panel in the details section of the Activity record



7

Attachments – download all

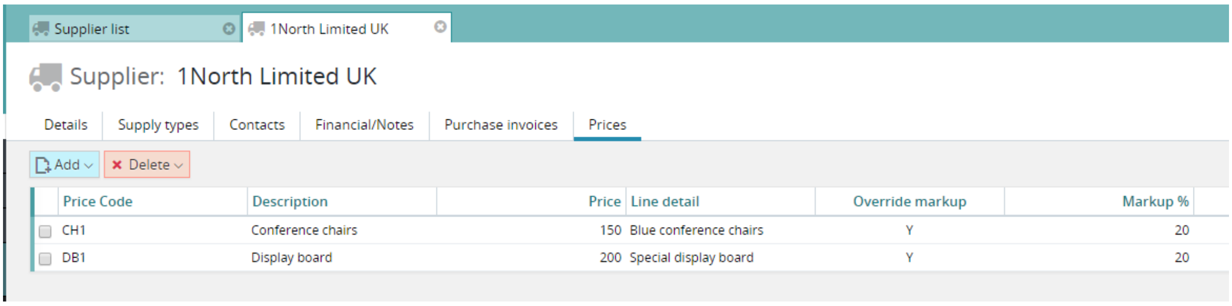
From an activity – attachments tab, you can now download all the attachments in the list with one click.



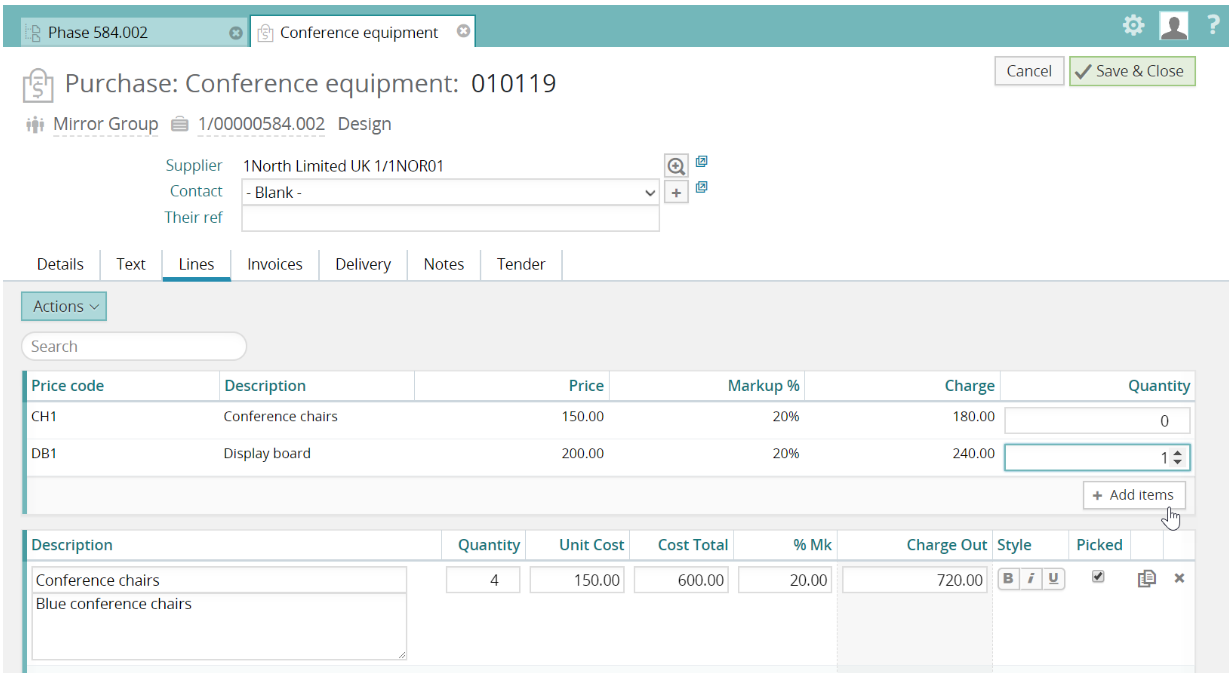
Purchasing

Supplier prices

These are now available in the browser interface
(non-material only)

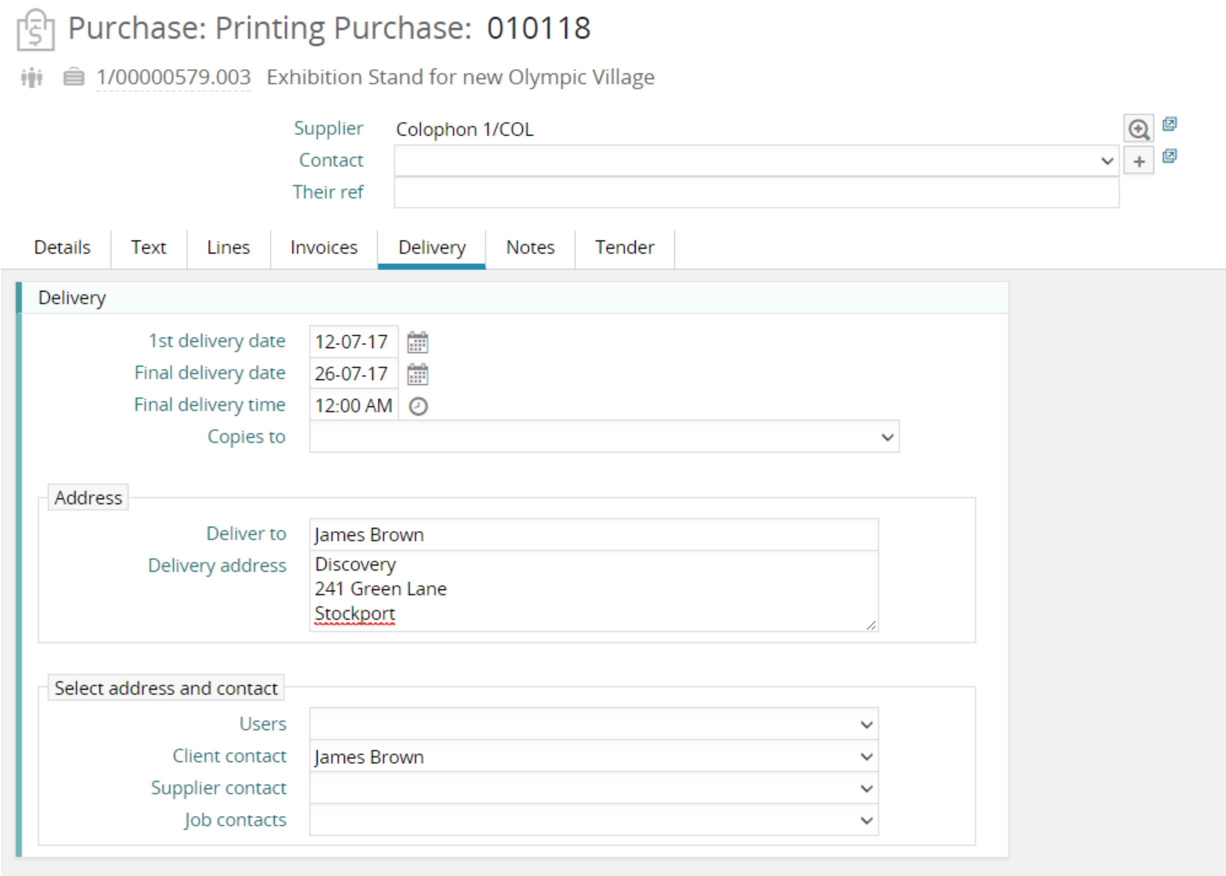


Supplier prices can be used when creating a multi-line purchase. The descriptions and price is then brought over automatically.



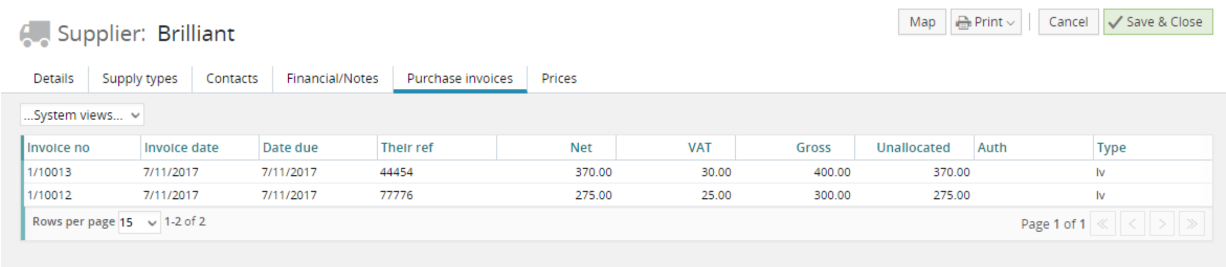
Delivery addresses

These are now fully supported in the browser interface



Supplier card – Invoices tab

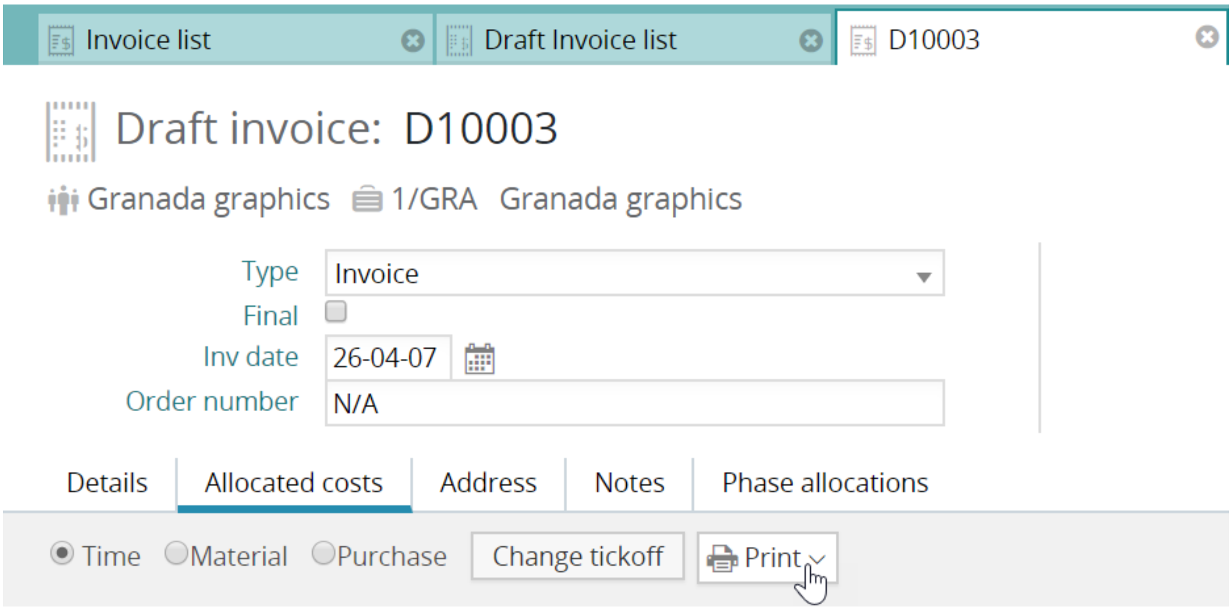
This has now been provided in the browser interface



Invoicing

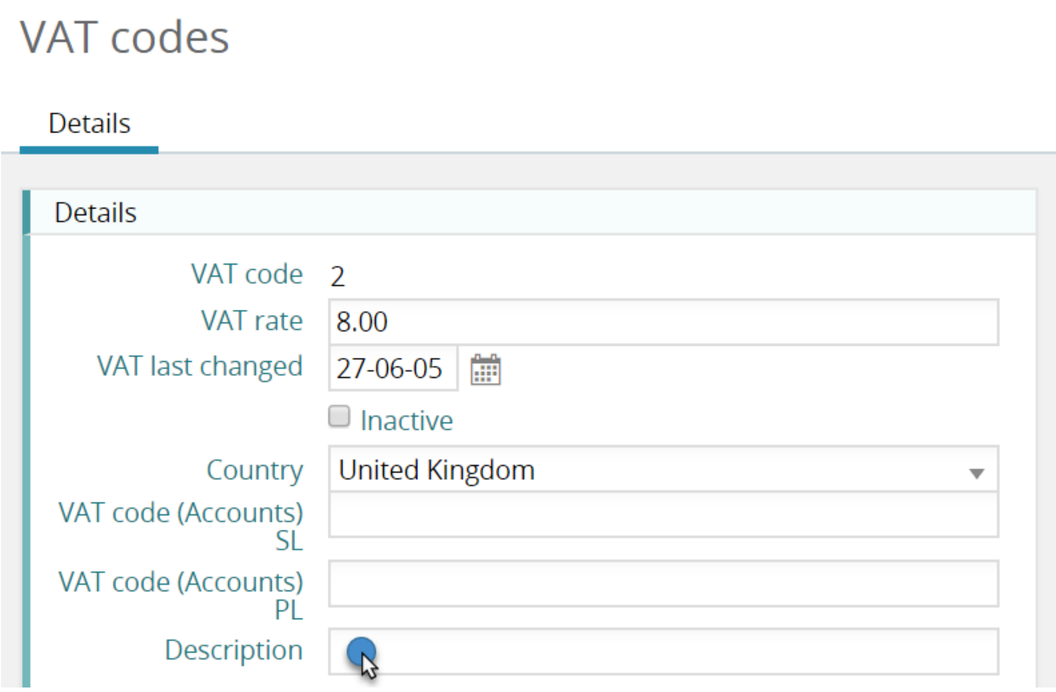
Invoice backing sheet

The option to print an invoice backing sheet (typically listing associated costs) is now available.



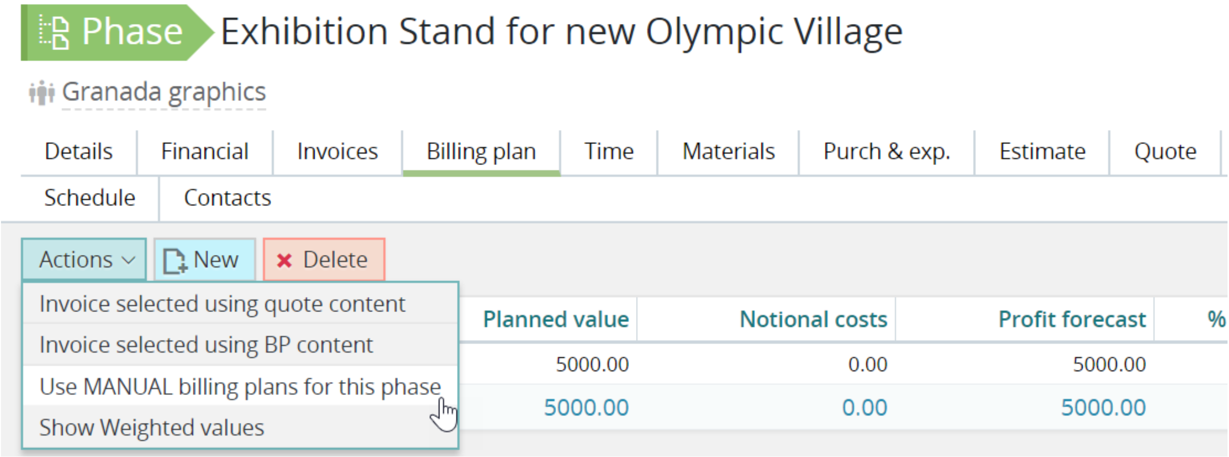
VAT table

A text field has been added to the VAT table to allow a VAT reference / descriptor. This is a common requirement in OB10 / e-billing solutions.



Auto billing plans

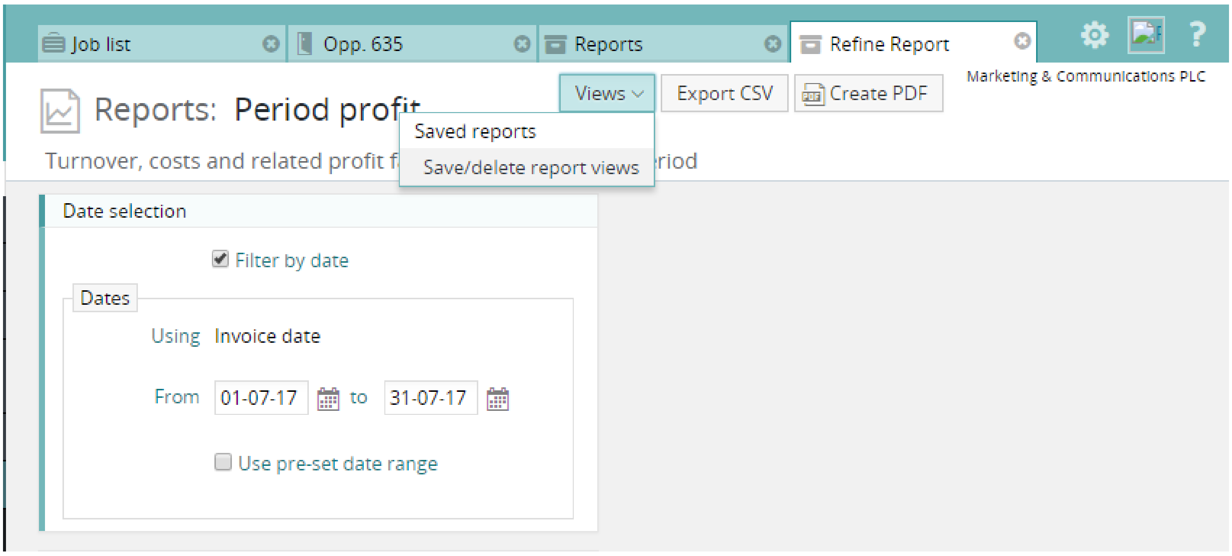
Option to switch to manual / auto now available in the browser interface.



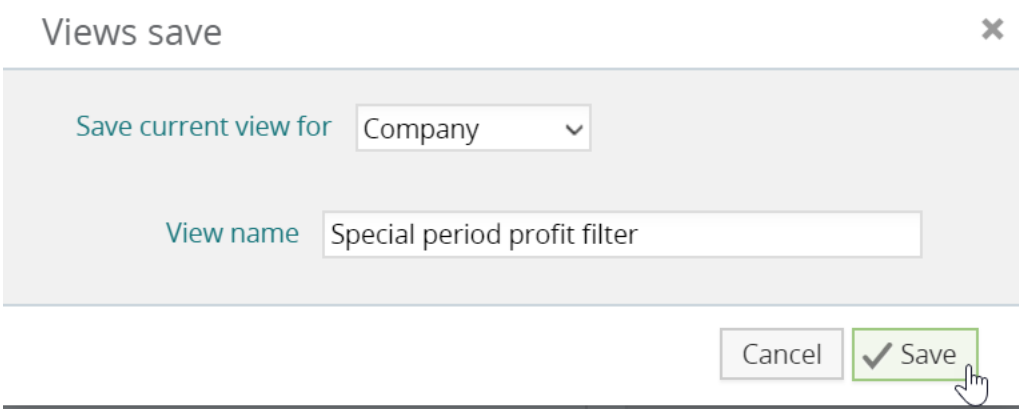
Reporting

Saving reports

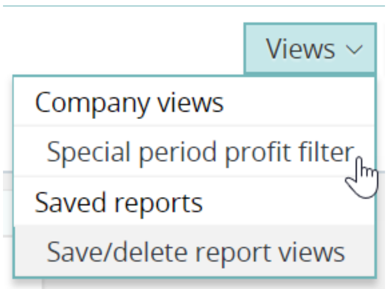
After selecting a report and setting your reporting criteria (date select etc.). You may wish to save these setting for running the same report at a later date.



You can save this report setting as a personal report, or one that is available to the entire company (access rights required to do this).



The report is then available under 'Views' in the report screen



Purchase invoices awaited report

Export version of Purchase invoices awaited report now has 1st delivery date and final delivery date added to the CSV (If 'delivery' activated in company settings.)

Sales Turnover & Profit by invoice – export versions

New columns - Currency Net, Vat, Gross, Currency code, currency name and exchange rate

API

API documentation

You will found the latest documentation for the Synergist API here:
https://apidoc.synergist.co.uk

New areas added to the API

- Activities
- Attachments
- Calendar
- Jobs – creating from a template

Support for sha512

Use sha512password= rather than password=
Example:

http://<SERVER>/jsonAPI/diary.json?user=user&sha512password=05d929ccb4693507ab5c1c25f6a582da1f27ac225882af5295e392ae89033c356b4ddf201f78dda3c16a4d6d198998

Timestamps added to API return data

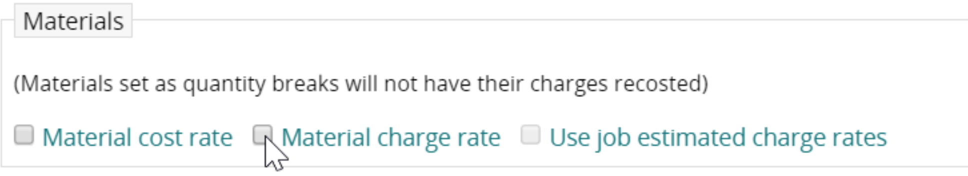
http://<SERVER>/jsonapi/tspending.json?company=1&version=3.1&page=1&rows=5&user=user&password=user&timestampfrom=1496145509


```
{
 "responsecode": 1,
 "responsestatus": "OK",
 "errorcode": 0,
 "errormessage": "",
 "totalrows": 14,
 "totalpages": 3,
 "responsemessage": "",
 "pagerows": 5,
 "pagenumber": 1,
 "success": true,
 "data": [
  {
   "tsUuid": "74B5078293C542C68C48D2B5DC275772",
   "tsTimeStampModified": 1500045590,
   "tspending_recordversionnumber": 26,
   "tsEntryNo": 2524,
   "tsJobAndPhase": "1/00000709.003",
   "tsStageCode": "",
   "tsChargeCode": "1/CT",
   "tsResourceCode": "1/APS",
   "tsMaterialCode": ""
  },
```

Advanced features/set-up

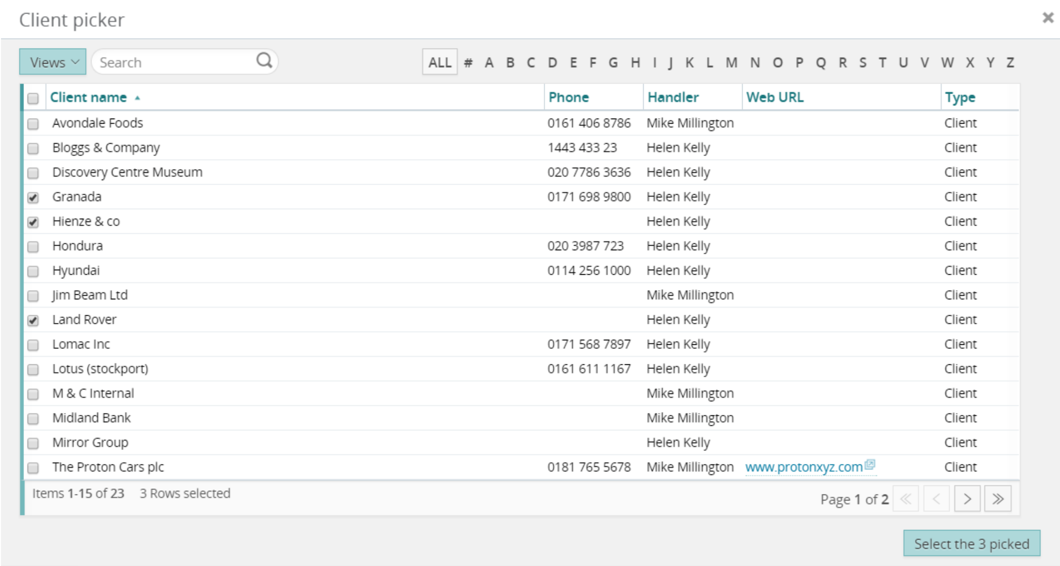
Re-cost

Re cost feature now supports material charge update.



Querying data

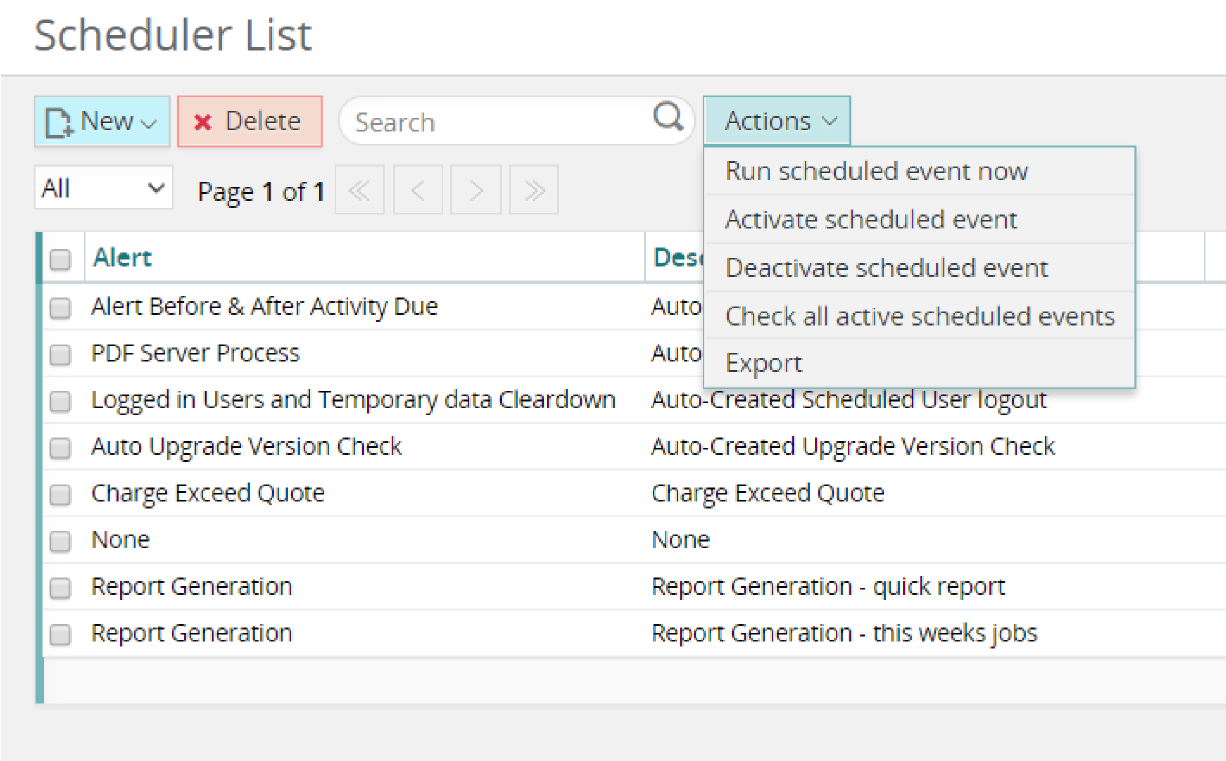
Previously it was only possible to select a single job/phase/supplier/client if querying for specific records. Now it is possible to select multiples.



Client name	Phone	Handler	Web URL	Type
Avondale Foods	0161 406 8786	Mike Millington		Client
Bloggs & Company	1443 433 23	Helen Kelly		Client
Discovery Centre Museum	020 7786 3636	Helen Kelly		Client
Granada	0171 698 9800	Helen Kelly		Client
Hienze & co		Helen Kelly		Client
Hondura	020 3987 723	Helen Kelly		Client
Hyundai	0114 256 1000	Helen Kelly		Client
Jim Beam Ltd		Mike Millington		Client
Land Rover		Helen Kelly		Client
Lomac Inc	0171 568 7897	Helen Kelly		Client
Lotus (stockport)	0161 611 1167	Helen Kelly		Client
M & C Internal		Mike Millington		Client
Midland Bank		Mike Millington		Client
Mirror Group		Helen Kelly		Client
The Proton Cars plc	0181 765 5678	Mike Millington	www.protonxyz.com	Client

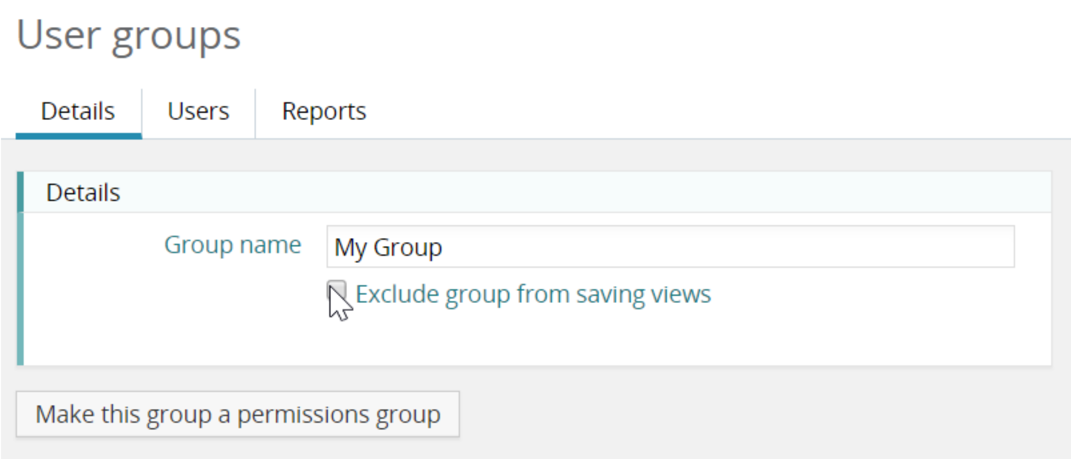
Scheduler list (utilities)

Actions button added to scheduler list on browser



User groups - more control over functionality

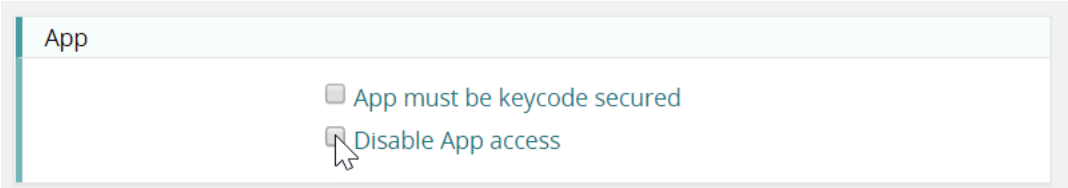
It is common practice to create several groups for permissions. However, it is not always required that these special groups be available when saving views. It is now possible to exclude these groups from saving views.



Synergist mobile app access

Access to the synergist mobile app can now be controlled at two levels

System parameters



User settings