

synergist[®]

Version 12.1 - Release Notes

Synergist Browser Interface

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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

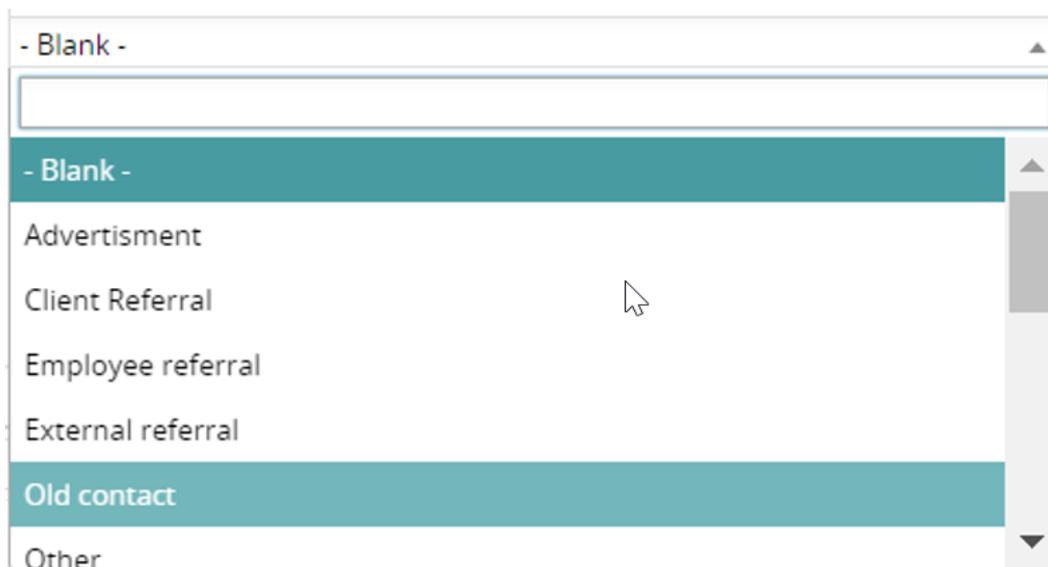
When opening a main new tab, previously Synergist would simply open the new tab at the end of the existing tabs. This could easily result in tabs that are related to one another (e.g. the Client list, and an open client record) being separated by other tabs.

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'

Phase 576.003

Phase Re-brand - August

Granada graphics

Details Financial Invoices Billing plan Time Materials Purch & exp. Estimate Quote Pending **Activities** Attachments Schedule

Contacts

New Delete

Display comments Include job activities

...System views... Note type: - All -

Type	Contact	Description/Comments	Created	Att	Due	Compl...	Owner	Priority
<input type="checkbox"/> Requisition	Jim Riley	Need some copy	09/08/2017		09/08/2017 8:00am		Mike Millington	Med

Rows per page 15 1-1 of 1 Page 1 of 1

The requisition

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

Phase 576.003 **Blank**

Activity: (369)

Details History Attachments

Description

Type Call

Subject Call

Details Email

Follow Up Call

Meeting Notes

Quotation

Status Requisition

Response

Priority Med

Status - Blank -

Category - Blank -

Linked to

Company Marketing & Communications PLC

Client 1/GRA Granada graphics

Job 1/00000576 - Re-brand - August

Phase 003 - Re-brand - August

People

Contact Jim Riley

Team - Blank -

Owner Mike Millington

Others

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.

Calendar bookings Phase 576.003 Need new icons

Activity: Need new icons (369)

Details History Attachments

Description

Type Requisition

Requisition

Hours 3

Preferred person Alex Cooper

Charge code Artwork

Subject Need new icons

Details see attached spec

Linked to

Company Marketing & Communications PLC

Client 1/GRA Granada graphics

Job 1/00000576 - Re-brand - August

Phase 003 - Re-brand - August

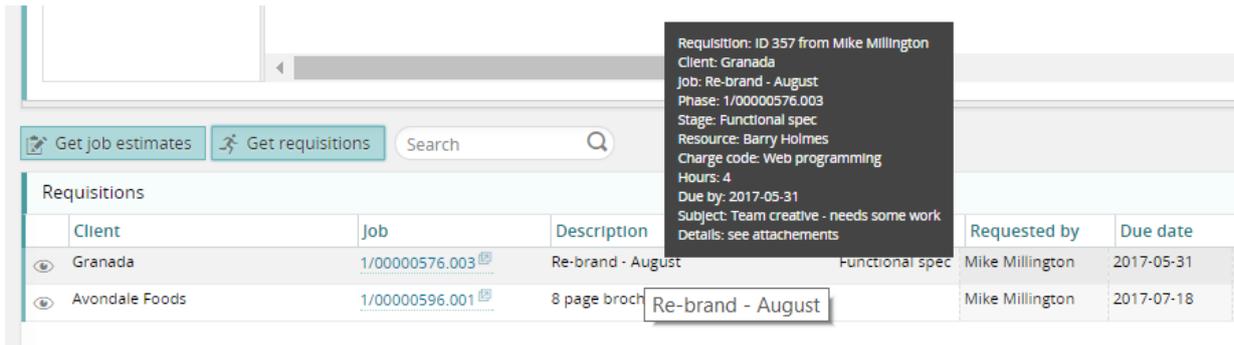
Booking a requisition

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

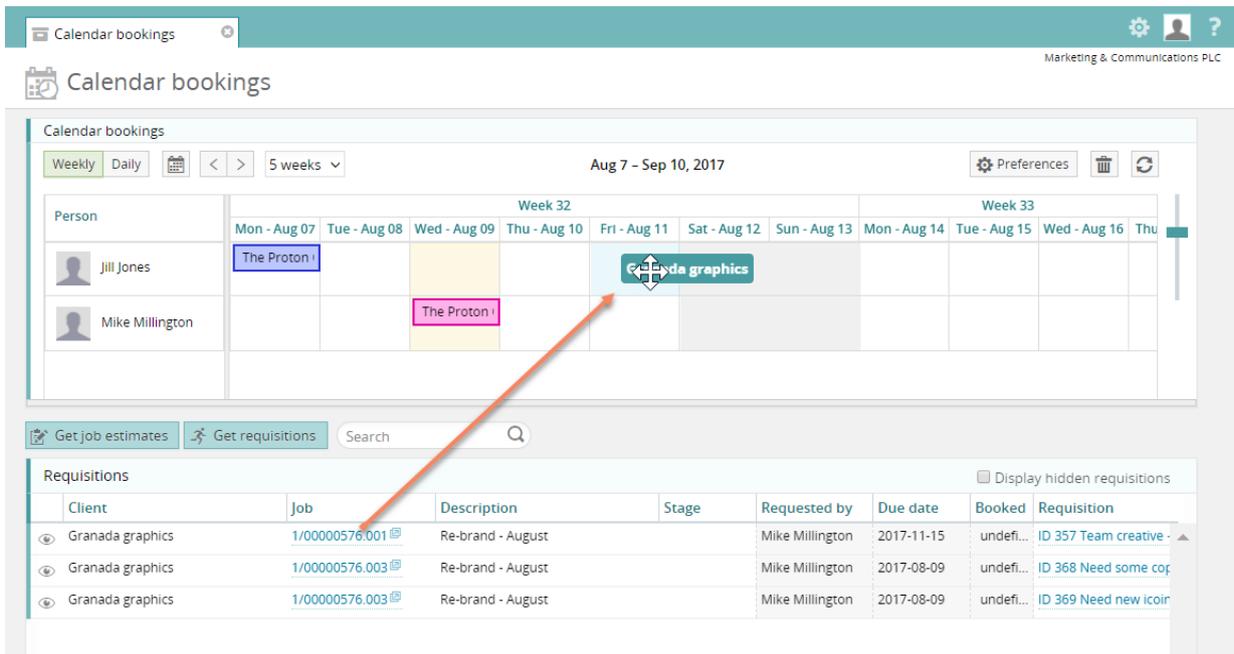


Requisition list

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.

The screenshot shows a web interface for creating a booking. The title bar reads "Calendar booking: Granada graphics". Below the title bar, there is a breadcrumb "Job No. 576 Re-brand - August" and a user profile "Jill Jones". The interface is split into two main panels:

- Booking details (left panel):** Contains fields for Phase (003 - Re-brand - August), Charge Code (Artwork), Subject, Show as (Normal), Draft (checkbox), All day (checkbox), Start (11-08-17 09:00:00), End (11-08-17 12:00:00), Day duration (3), Total (3), Bookings (1), Notes (text area), Colour (dropdown), and Created (text field).
- Requisition (right panel):** Shows "Requisition: ID 369 from Mike Millington" with fields for Hours (3), Due By (09/08/2017), Subject (Need new icons), and Details (see attached spec). A "Full requisition details" link is at the bottom right.

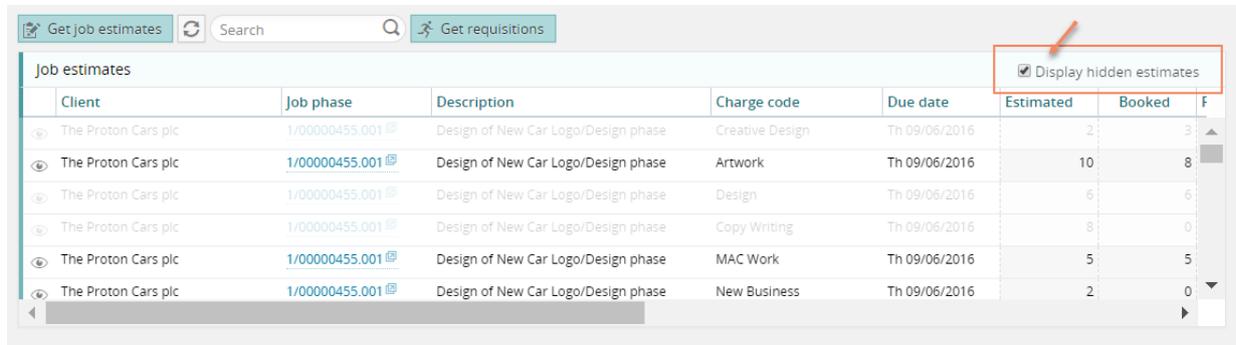
At the bottom right of the interface, there are "Cancel" and "Save" buttons.

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



Get job estimates		Search	Get requisitions				
Job estimates							
Client	Job phase	Description	Charge code	Due date	Estimated	Booked	F
The Proton Cars plc	1/00000455.001	Design of New Car Logo/Design phase	Creative Design	Th 09/06/2016	2	3	
The Proton Cars plc	1/00000455.001	Design of New Car Logo/Design phase	Artwork	Th 09/06/2016	10	8	
The Proton Cars plc	1/00000455.001	Design of New Car Logo/Design phase	Design	Th 09/06/2016	6	6	
The Proton Cars plc	1/00000455.001	Design of New Car Logo/Design phase	Copy Writing	Th 09/06/2016	8	0	
The Proton Cars plc	1/00000455.001	Design of New Car Logo/Design phase	MAC Work	Th 09/06/2016	5	5	
The Proton Cars plc	1/00000455.001	Design of New Car Logo/Design phase	New Business	Th 09/06/2016	2	0	

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

Company settings

Details	Defaults	Codes	Accounts	Accounts Details
Timesheets	Advanced	Attachments	Job Folders	Email
Defaults				
Phases				
First phase	1			
Phase increment	0			
Working day				
Time limit	10			
Hours in a day	8			
Calendar max hours for booking (0 = day length)	0			

- 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

Calendar preferences

Interface settings

- Show draft
- Show real
- Show weekends
- Show teams

Calendar time slot:

Start of day:

End of day:

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

Calendar bookings

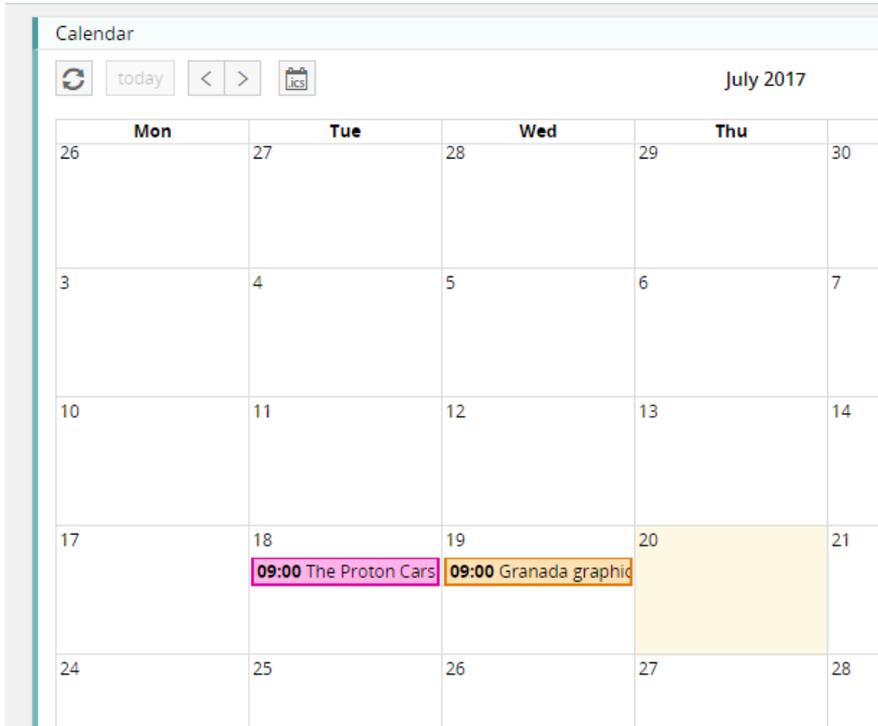
Weekly **Daily** < > 2 weeks ▾ Sep 4 - 17, 2017

Person	Mon - Sep 04			Tue - Sep 05						Wed - Sep 06				Wei				
	9pm	10pm	11pm	12am	1am	2am	3am	9pm	10pm	11pm	12am	1am	2am	3am	9pm	10pm	11pm	1
	▼ No Team Mike Millington								London Underground - 1019.001 - 5.5									
▼ Test team Jo Grant																		

MyCalendar – colours

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

Calendar



The screenshot shows a web-based calendar interface for July 2017. The calendar grid displays days from 26 to 30. Two bookings are visible: '09:00 The Proton Cars' on Tuesday, July 18th, highlighted in pink, and '09:00 Granada graphic' on Wednesday, July 19th, highlighted in orange. The Thursday, July 20th cell is highlighted in yellow. The interface includes navigation controls like 'today', '<', '>', and 'ics' icons.

Mon	Tue	Wed	Thu	
26	27	28	29	30
3	4	5	6	7
10	11	12	13	14
17	18 09:00 The Proton Cars	19 09:00 Granada graphic	20	21
24	25	26	27	28

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.

Job picker

Remember selection

Client London Underground

Job 3/00001000 Repair Junction 353/1233/GTR

Phase 001 Repair Burnt Junction 353/1233/GTR

Timesheet

Date 09-08-17

Investment

Time

Charge code Amends

Normal Hours 0

Timer

Submit all

Date	Job and phase	Charge code	Hrs	Status	
09/08/2017	3/00001000.001 London Underground - Repair Junction 353/1233/GTR - Repair Burnt Junc...	Amends	0	Submit	x
01/08/2017	3/00001001.001 London Underground - Repair Carriage 2322353/1233/GTR - Repair Burnt...	Amends	0	Submit	x

Time Elapsed - 00:01:14

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.

🕒 Estimate line: Time

🏠 Enterprise Trust 16/au00565.006 test chargecodes Display artwork

Charge code type

Charge code

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.

Weekly timesheet: Mike Millington

Cancel Save

Actions Add job Submit all

This week << < 7 Mon > >>

					Submit	Submit	Submit	Submit	Submit	Submit	Submit	Total Hou...
	Client	Job Phase	Stage	Charge code	Aug '17 7 Mon	Aug '17 8 Tue	Aug '17 9 Wed	Aug '17 10 Thu	Aug '17 11 Fri	Aug '17 12 Sat	Aug '17 13 Sun	
	London Underground	1000.001		Amends			0					3
	Repair Junction 353/1233/GTR - Repair Burnt Junction 353/1233/GTR			x1.5		3	0					
×	London Underground	1003.001		Copy Writing								0
	Repair Carriage 2343/1233/TRD - Repair Burnt Junction 353/1233/GTR											
	London Underground	1012.001	Proofing	Amends								3
	Brochure design			x1.5		3						
Daily Total Hours					0	6	0	0	0	0	0	6

Post / Submit all button

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

Weekly timesheet

Weekly timesheet: Mike Millington

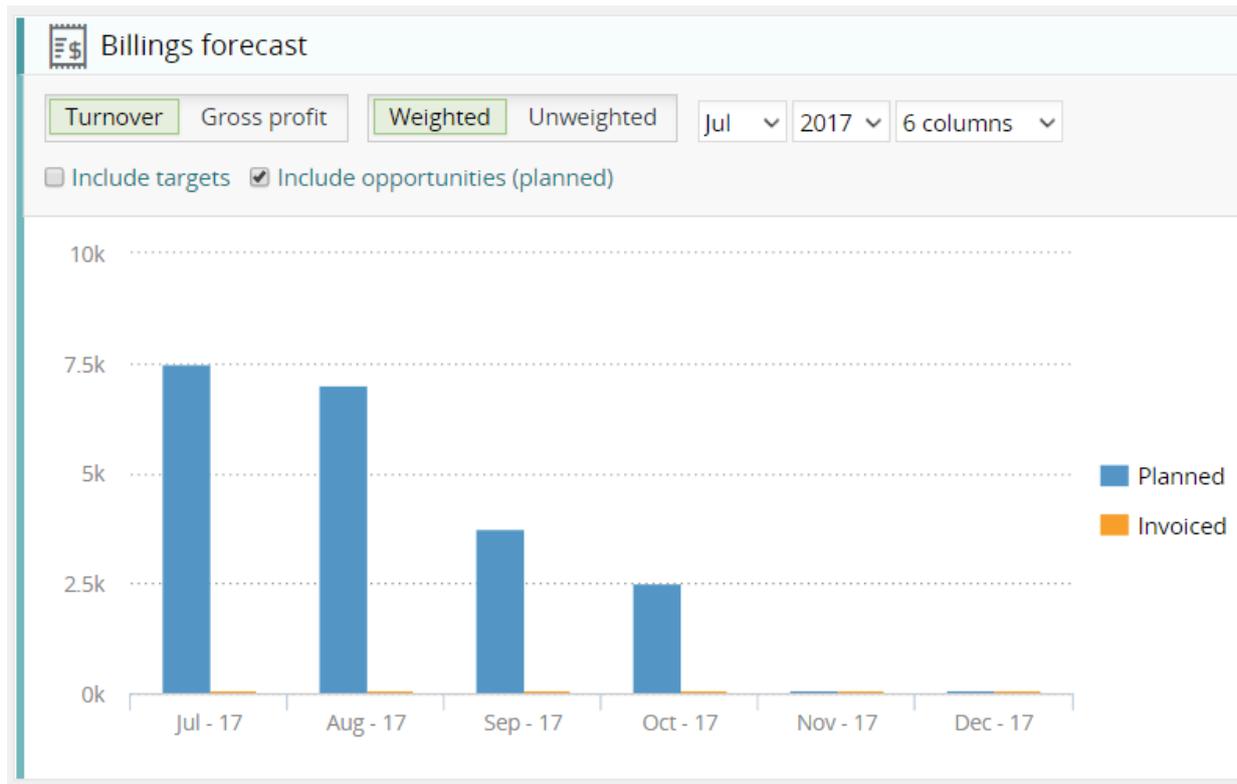
Actions Add job **Submit all**

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

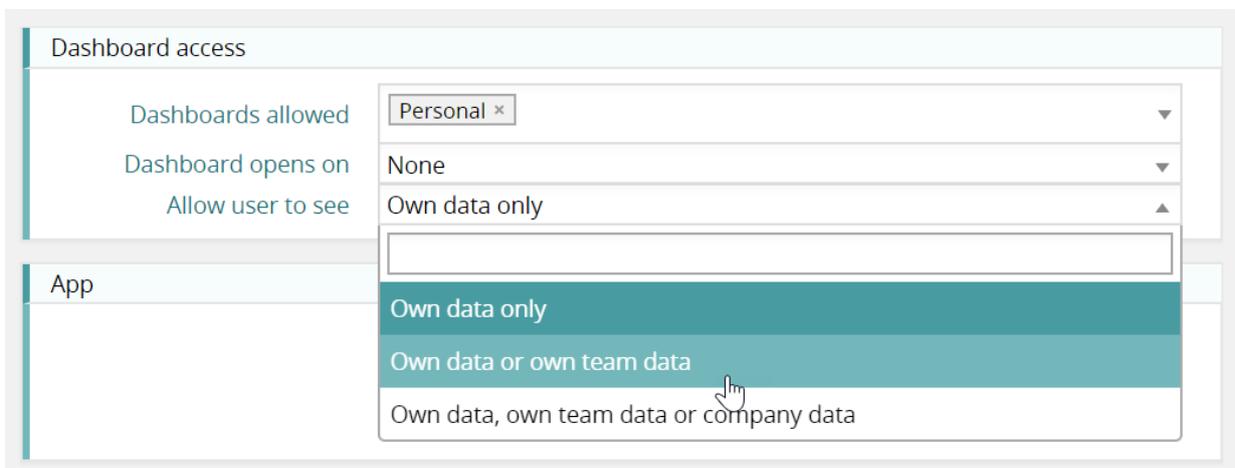
In addition to 'all' and 'current user' options, dashboards can now be filtered by 'My Team'.

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

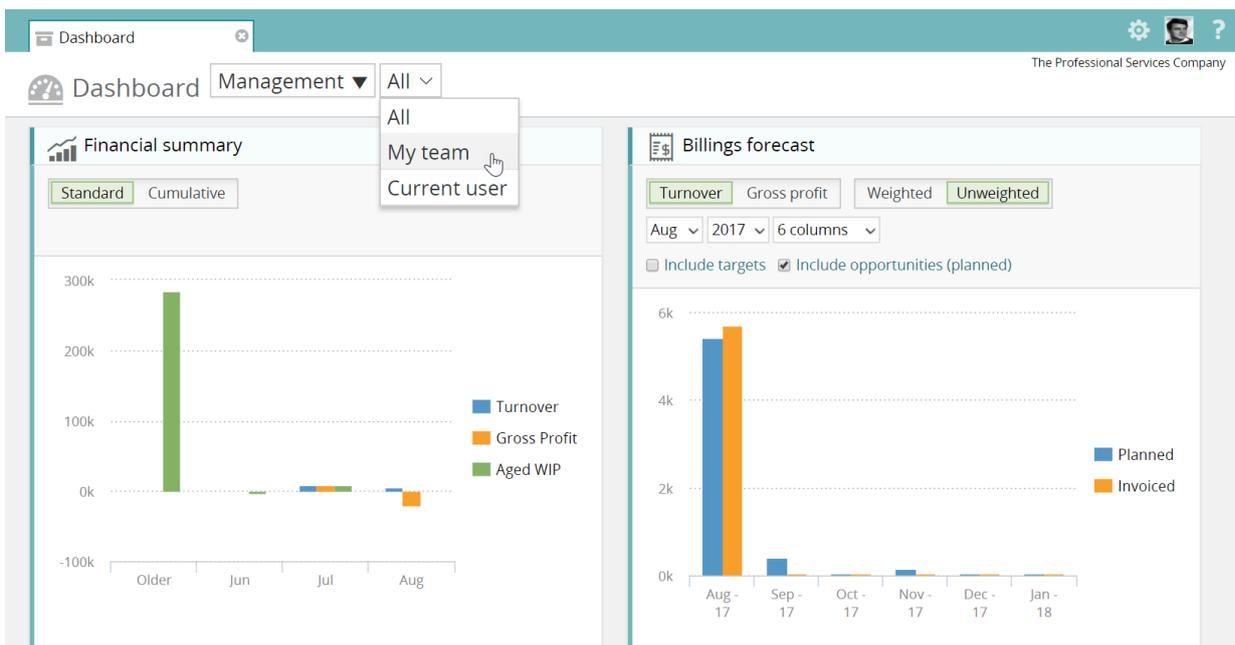
Option in user table

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

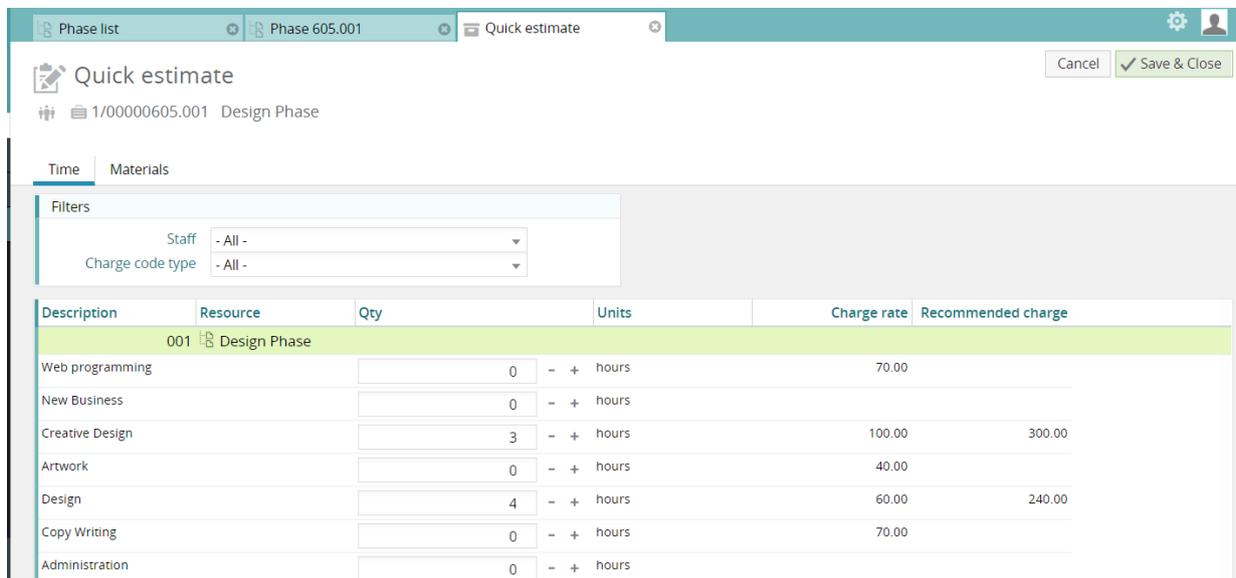
By selecting a member of staff in the staff drop down list you can allocate work to a specific member of staff.

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)



The screenshot shows a web application interface for creating a quick estimate. At the top, there are tabs for 'Phase list', 'Phase 605.001', and 'Quick estimate'. Below the tabs, there are 'Cancel' and 'Save & Close' buttons. The main area is titled 'Quick estimate' and shows a breadcrumb '1/00000605.001 Design Phase'. There are two tabs: 'Time' (selected) and 'Materials'. A 'Filters' section contains two dropdown menus: 'Staff' (set to '- All -') and 'Charge code type' (set to '- All -'). Below the filters is a table with the following data:

Description	Resource	Qty	Units	Charge rate	Recommended charge
001 Design Phase					
Web programming		0	- + hours	70.00	
New Business		0	- + hours		
Creative Design		3	- + hours	100.00	300.00
Artwork		0	- + hours	40.00	
Design		4	- + hours	60.00	240.00
Copy Writing		0	- + hours	70.00	
Administration		0	- + hours		

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.

Description	Quantity	Unit price	% Discount	Value	Style
<input type="checkbox"/> Design & Print	0	0.00	0.00	5000.00	B i U
<input type="checkbox"/> For lamination of outer cover	0	0.00	0.00	200.00	B i U
<input type="checkbox"/> Option:	0	0.00	0.00	0.00	B i U
<input checked="" type="checkbox"/> printed full colour onto 150 gsm art paper	0	0.00	0.00	1000.00	B i U
<input checked="" type="checkbox"/> printed full colour onto 150 gsm cartridge	0	0.00	0.00	1200.00	B i U

Description	Quantity	Unit price	% Discount	Value	Style
Printing	0	0.00	0.00	2200.00	B i U

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...

Views Filter New Quick estimate Revisions Estimate Authorised/Locked Actual to estimated cost

Description	Units		Cost		Charge		Profit		staff	P	Q	Opt		
	Estimated	Actual	Estimated	Actual	Estimated	Actual	Estimated	Actual						
Printing Purchase														
Printing Purchase														
Printing Purchase														
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(0%)					
Gross Estimated Profit								0.00	(0%)					

Clients & jobs

Companies registration number

This is now available on the client detail tab

Client: Jameson sweets

Main details

Code 3/3342

Name Jameson sweets

Email

Web URL

Phone

Fax

Info

Company reg. number 56655655

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.

Clients batch process for 3 records ✕

Data

To change any of the following select a new value below.
Any values that are left blank will be left unchanged.

Mark as inactive Mark as active

Handler

Source

Client type

Status/Grade

Market sector

Lead rating

VAT

Payment terms

Country

Custom fields

special client type

Sub client type

Test Link to alias

date x

Free text (mand)

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.

The screenshot shows the 'Notes' tab for client 'Hondura'. The interface includes a top navigation bar with 'Client list' and 'Hondura' selected. Below the navigation bar are buttons for 'Map', 'Print', 'Cancel', and 'Save & Close'. The main content area has tabs for 'Details', 'Contacts', 'Activities', 'Attachments', 'Financial', 'Targets', 'Invoices', 'Jobs', 'Phases', 'Projects', 'Campaigns', 'Notes', and 'Prices'. The 'Notes' tab is active, showing a 'Client specification' and 'Notes' text area. To the right is a 'Miscellaneous' section with a dropdown menu set to '- Blank -'. Below the notes is a 'Link an organization' button and a table of 'Linked organizations'.

Code	Name	Phone	Handler	Web URL	
1/PROSPECT	Discovery Centre Museum	020 7786 3636	Helen Kelly		Delete

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

The screenshot shows the 'Job list' view. The top navigation bar includes 'Job list', 'Client list', and 'Hondura'. Below the navigation bar are buttons for 'Views', 'Actions', 'New', 'Filter', 'Delete', and a search box. The main content area is a table of jobs with columns for 'Job', 'Client', 'Handl...', and 'Description'. The table shows 16 rows of jobs, with the first three rows for 'Hondura' and the remaining 13 rows for 'Discovery Centre Museum'. The 'Rows per page' is set to 15, and the current view shows 'Items 1-15 of 16'.

Job	Client	Handl...	Description
627	Hondura	MP	Updated landing page
628	Hondura		Financial analysis - on site
632	Hondura	HK	Conference stands
633	Discovery Centre Muse...	HK	Cycle web site
594	Hondura	HK	PR - fee job
602	Discovery Centre Muse...	MP	Brochure test billing plan 1
608	Discovery Centre Muse...		PR job
607	Discovery Centre Muse...	MP	Brochure design B
593	Hondura	HK	PR Fee job
600	Hondura	HK	Web site re-write
599	Discovery Centre Muse...	MP	PR - local press
603	Discovery Centre Muse...	MP	PR - National media
604	Discovery Centre Muse...		PR - special press release
592	Hondura	HK	Web site re-write
577	Discovery Centre Muse...	MP	Exhibition Stand - Sept

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.

Job batch process for 3 records

Data

To change any of the following select a new value below. Any values that are left blank will be left unchanged.

Process

Mark as complete 11-08-17 

Mark as incomplete

Recost jobs/phases

Change

Stage

Type

Priority

Handler

Update job teams

Team

Status

Update phases

Reset Dates

Start date 00/00/00  Due date 00/00/00 

Project

Sub-Project

Change sales information

Sales status

Pipeline stage

Rating

Expected close 00/00/00 

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.

Phase batch process for 3 records

Data

To change any of the following select a new value below. Any values that are left blank will be left unchanged.

Process

Mark as complete 11-08-17 

Mark as incomplete

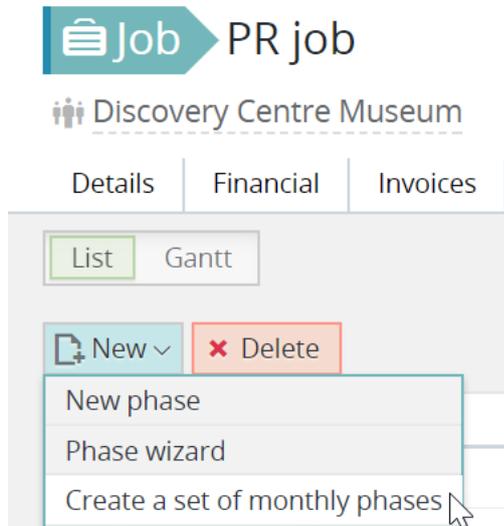
Recost jobs/phases

Change

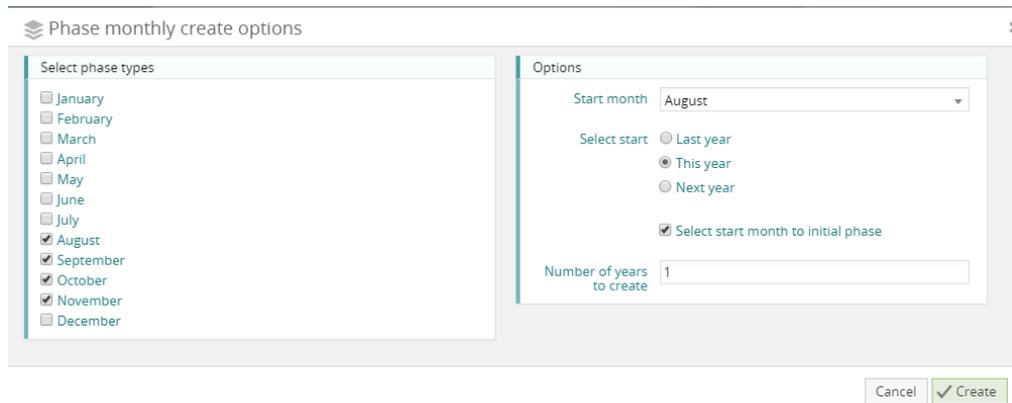
Type	<input type="text"/>
Priority	<input type="text"/>
Handler	<input type="text"/>
Phase Owner	<input type="text"/>
Status	<input type="text"/>

Create a set of monthly phases

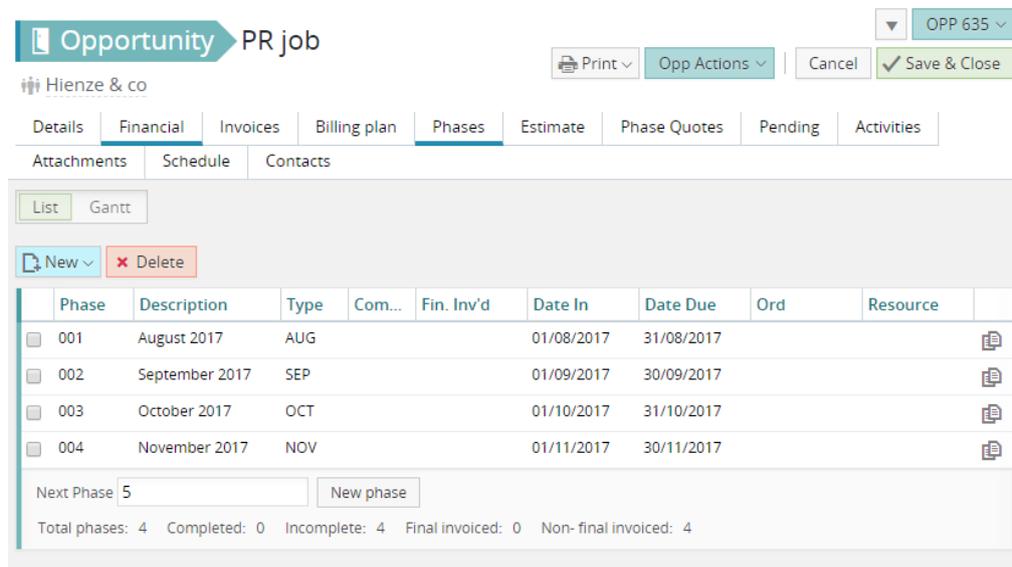
Typically this feature is used to create a set of phases for billing retainer type jobs. This is accessed from the 'New' button on the 'phases' tab of a job / opportunity.



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

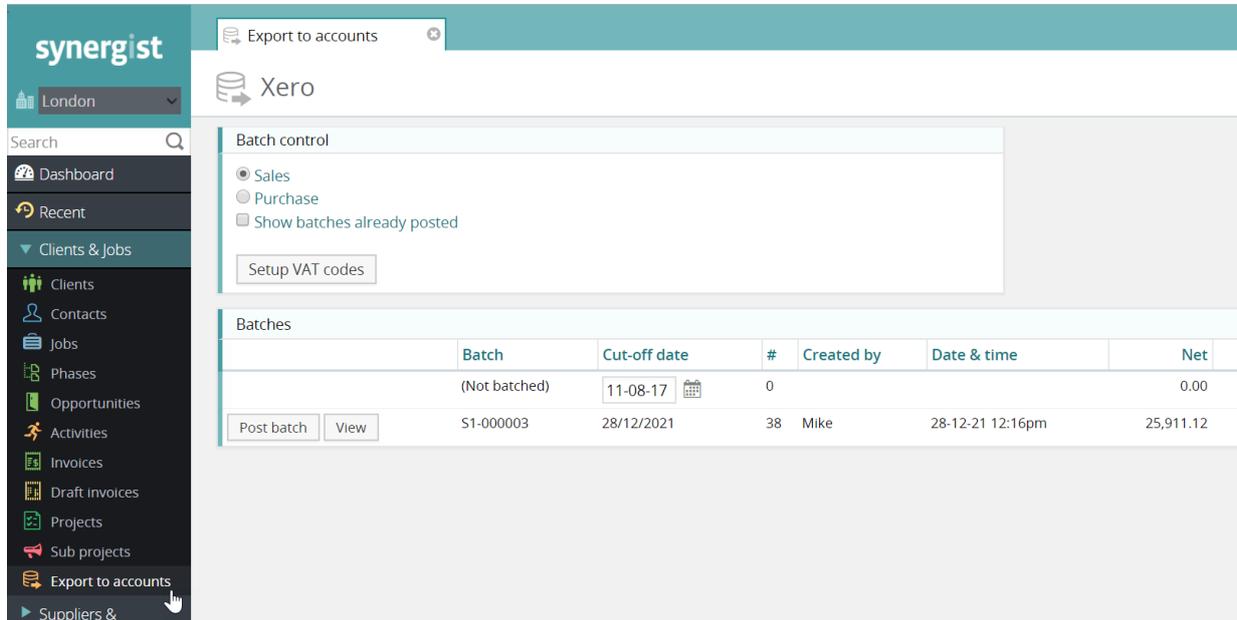
The screenshot shows the 'Stage list - Current' interface. The sidebar menu on the left includes 'Dashboard', 'Recent', 'Clients & Jobs', 'Clients', 'Contacts', 'Jobs', 'Phases', 'Opportunities', 'Activities', 'Invoices', 'Draft Invoices', 'My projects', 'My sub projects', 'Stages', 'Export to accounts', 'Suppliers & Purchases', 'Time & Expenses', 'Reports', and 'Scheduling'. The 'Stages' menu item is highlighted, and an orange arrow points from it to the table. The table has columns for 'Client', 'Job phase', 'Status', and 'Description'. The table contains 16 rows of data. The 'Rows per page' dropdown is set to 16, showing 1-16 of 600 rows.

Client	Job phase	Status	Description
<input type="checkbox"/> Bassy Brewers	1/00000546	Live	Copywriting
<input type="checkbox"/> Bassy Brewers	1/00000690.030	Quote	Client approval
<input type="checkbox"/> Nike Footwear long name for now	1/00001161.006	Quote	Final Approval
<input type="checkbox"/> Nike Footwear long name for now	1/00001161.006	Quote	With Client
<input type="checkbox"/> PO Tracking Co	1/00009267.002	Quote	Ready for invoicing
<input type="checkbox"/> PO Tracking Co	1/00009267.002	Quote	On Hold
<input type="checkbox"/> PO Tracking Co	1/00009267.003	Quote	Proofing
<input type="checkbox"/> PO Tracking Co	1/00009267.004	Quote	On Hold
<input type="checkbox"/> PO Tracking Co	1/00009267.004	Quote	Ready for invoicing
<input type="checkbox"/> PO Tracking Co	1/00009267.003	Quote	Estimate_Stage
<input type="checkbox"/> PO Tracking Co	1/00009267.003	Quote	Proofing
<input type="checkbox"/> PO Tracking Co	1/00009267.003	Quote	Copywriting
<input type="checkbox"/> PO Tracking Co	1/00009267.003	Quote	Client approval
<input type="checkbox"/> A B Applications Ltd	1/00088117.017	In-house	Ready for invoicing
<input type="checkbox"/> A B Applications Ltd	1/00088117.017	In-house	With Client
<input type="checkbox"/> A B Applications Ltd	1/00088565.006	Live	Put on hold

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.

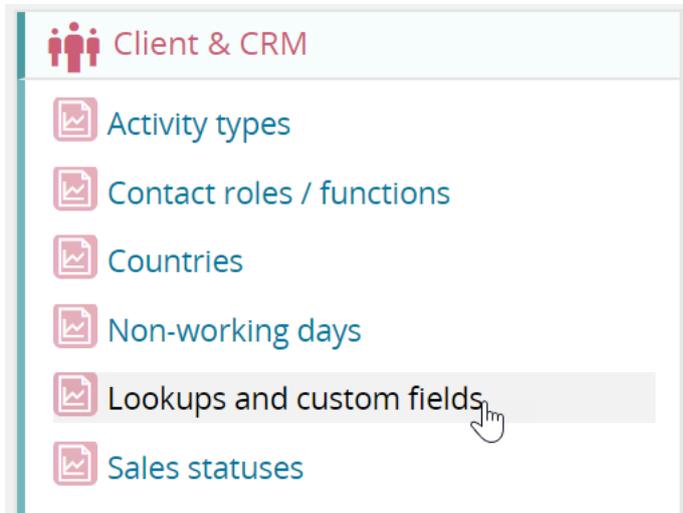
Sage 200 accounts link

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

Activity: notes from meeting (24)

Details | History | Attachments

Description

Type: Call

Subject: notes from meeting

Details: see attached ...

Insert topic text...

Status

Complete

Priority: High

Status: - Blank -

Category: - Blank -

Alerts

Date due: 20-05-07

Time due: 12:00 AM

Reminder: None

Immediate alert

Alert on completion

Custom fields

Special category: AB

7

Attachments – download all

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

Activity: notes from meeting (24)

Details | History | Attachments

 New  Delete  Download all

	Attachment name	Created	Created By
<input type="checkbox"/>	Quotation.dot_1 - test	28/09/2007 10:13am	Designer
<input type="checkbox"/>	favicon-16.png	01/08/2017 3:59pm	Mike Millington

Purchasing

Supplier prices

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

Price Code	Description	Price	Line detail	Override markup	Markup %
CH1	Conference chairs	150	Blue conference chairs	Y	20
DB1	Display board	200	Special display board	Y	20

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

Price code	Description	Price	Markup %	Charge	Quantity
CH1	Conference chairs	150.00	20%	180.00	0
DB1	Display board	200.00	20%	240.00	1

Description	Quantity	Unit Cost	Cost Total	% Mk	Charge Out	Style	Picked
Conference chairs	4	150.00	600.00	20.00	720.00	B i U	☑
Blue conference chairs							

Delivery addresses

These are now fully supported in the browser interface

 Purchase: Printing Purchase: 010118
  1/00000579.003 Exhibition Stand for new Olympic Village

Supplier: Colophon 1/COL
Contact:
Their ref:

Details | Text | Lines | Invoices | **Delivery** | Notes | Tender

Delivery

1st delivery date: 12-07-17 
Final delivery date: 26-07-17 
Final delivery time: 12:00 AM 
Copies to:

Address

Deliver to: James Brown
Delivery address: Discovery
241 Green Lane
Stockport

Select address and contact

Users:
Client contact: James Brown
Supplier contact:
Job contacts:

Supplier card – Invoices tab

This has now been provided in the browser interface

 Supplier: Brilliant Map Print Cancel Save & Close

Details | Supply types | Contacts | Financial/Notes | **Purchase invoices** | Prices

...System views...

Invoice no	Invoice date	Date due	Their ref	Net	VAT	Gross	Unallocated	Auth	Type
1/10013	7/11/2017	7/11/2017	44454	370.00	30.00	400.00	370.00		iv
1/10012	7/11/2017	7/11/2017	77776	275.00	25.00	300.00	275.00		iv

Rows per page: 15 | 1-2 of 2 Page 1 of 1 

Invoicing

Invoice backing sheet

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

The screenshot shows a browser interface for managing invoices. At the top, there are three tabs: 'Invoice list', 'Draft Invoice list', and 'D10003'. Below the tabs, the main heading is 'Draft invoice: D10003'. Underneath, there are icons for 'Granada graphics' and a folder icon labeled '1/GRA Granada graphics'. The form contains the following fields:

- Type: Invoice (dropdown menu)
- Final:
- Inv date: 26-04-07 (with a calendar icon)
- Order number: N/A

Below the form, there are five tabs: 'Details', 'Allocated costs', 'Address', 'Notes', and 'Phase allocations'. At the bottom, there are radio buttons for 'Time', 'Material', and 'Purchase'. To the right of these are two buttons: 'Change tickoff' and 'Print' (with a dropdown arrow). A mouse cursor is pointing at the 'Print' button.

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.

VAT codes

The screenshot shows the 'Details' tab of a VAT code form. The form contains the following fields:

- VAT code: 2
- VAT rate: 8.00
- VAT last changed: 27-06-05 (with a calendar icon)
- Inactive
- Country: United Kingdom (dropdown menu)
- VAT code (Accounts) SL: [empty text field]
- VAT code (Accounts) PL: [empty text field]
- Description: [empty text field with a blue circular icon]

Auto billing plans

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

Phase Exhibition Stand for new Olympic Village

Granada graphics

Details | Financial | Invoices | **Billing plan** | Time | Materials | Purch & exp. | Estimate | Quote

Schedule | Contacts

Planned value	Notional costs	Profit forecast	%
5000.00	0.00	5000.00	
5000.00	0.00	5000.00	

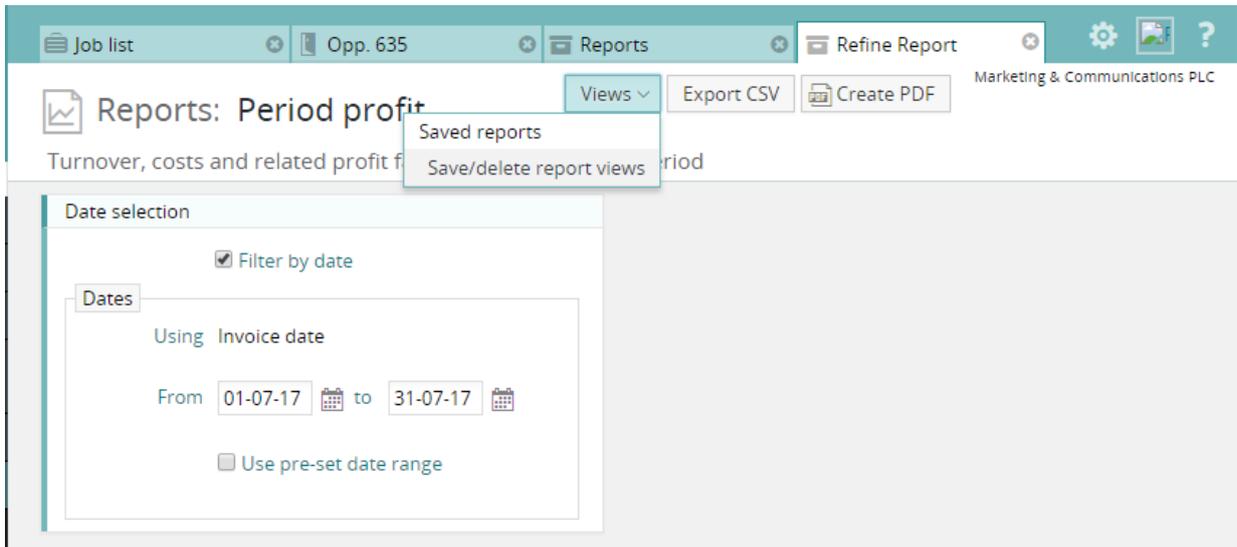
Actions ▾ New Delete

- Invoice selected using quote content
- Invoice selected using BP content
- Use MANUAL billing plans for this phase
- Show Weighted values

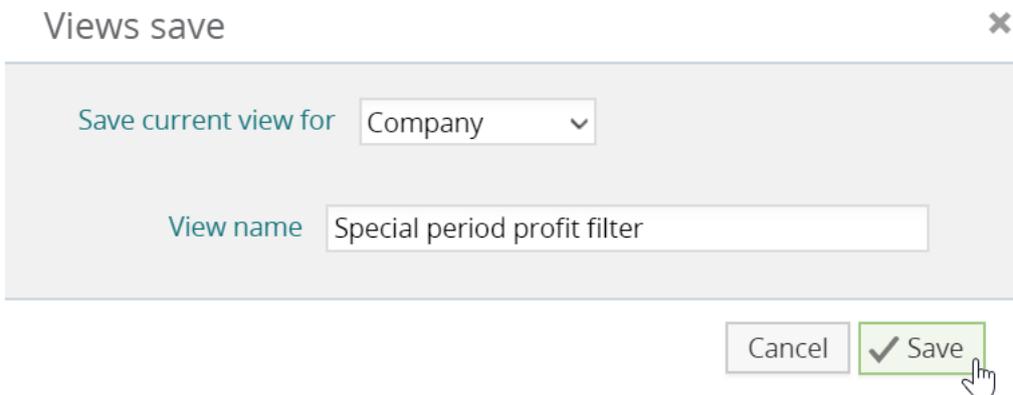
Reporting

Saving reports

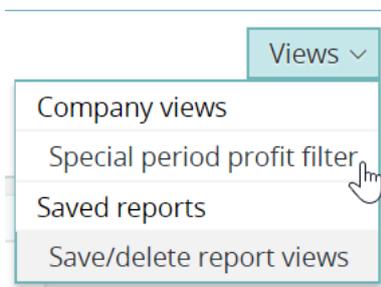
After selecting a report and setting your reporting criteria (date select etc.). You may wish to save these settings for running the same report at a later date.



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 find 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×tampfrom=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.

Materials

(Materials set as quantity breaks will not have their charges recosted)

Material cost rate Material charge rate Use job estimated charge rates

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 picker x

Views

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

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

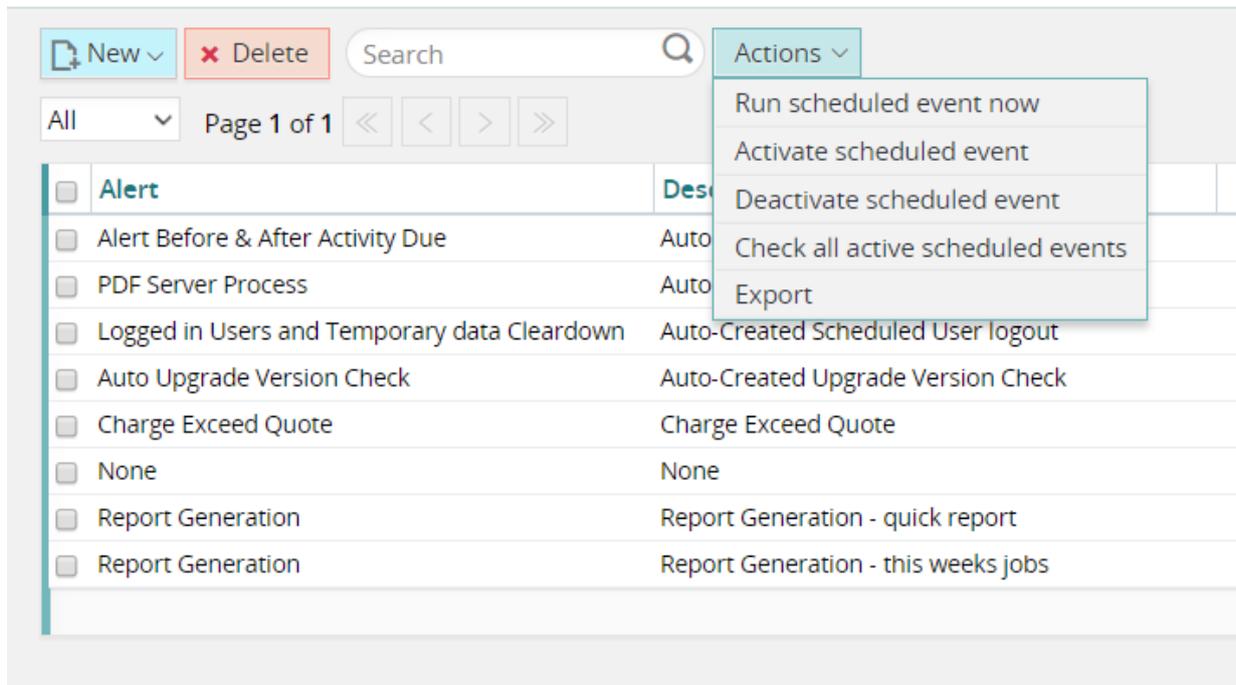
Items 1-15 of 23 3 Rows selected

Page 1 of 2

Scheduler list (utilities)

Actions button added to scheduler list on browser

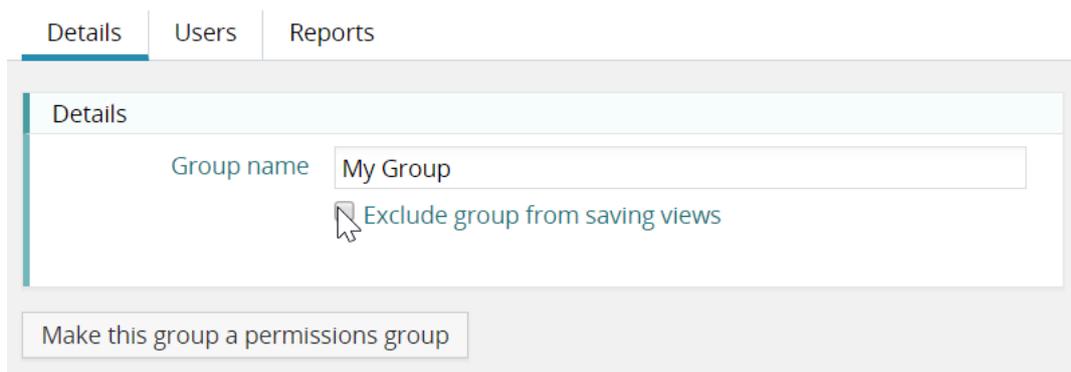
Scheduler List



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.

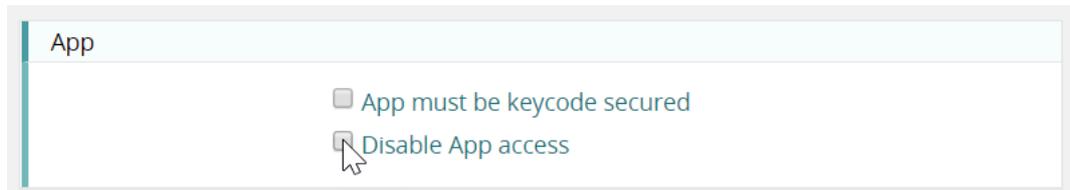
User groups



Synergist mobile app access

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

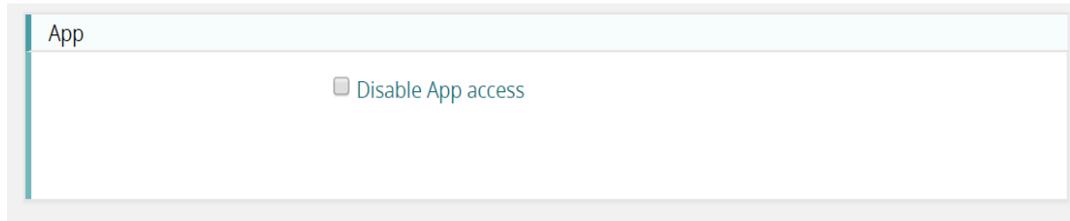
System parameters



A screenshot of a web interface showing the 'App' settings under 'System parameters'. The settings are as follows:

App
<input type="checkbox"/> App must be keycode secured
<input type="checkbox"/> Disable App access

User settings



A screenshot of a web interface showing the 'App' settings under 'User settings'. The settings are as follows:

App
<input type="checkbox"/> Disable App access