

synergist[®]

Version 12.1 - Release Notes

Desktop version (4D client)

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Synergist v12.1 release (desktop version)

Overview

Most of the developments in the 12.1 Synergist release relate to the Synergist web application or for features that are affected in both platforms. However, there are some issues that only relate to the 4D client (desktop) version of Synergist. These changes are detailed in this document.

Scheduling

Minor enhancements

The option of only deleting “this and future bookings” when you right click on a booking which is part of linked group.

The addition of options for 6, 8 & 12 weeks on the paste special screen

Purchasing

Purchase invoice import

New import feature in the Synergist full desktop client to allow the import of purchase invoice header records from a CSV file. A standard field layout is required for the source document. For more information about this feature please call Synergist support.

Proposed field layout for Purchase invoice CSV Import

Field	Details	Example	Field Heading
Synergist Supplier Code	Max 10 Chars	1/AMAZON	SupplierCode
Purchase invoice number	Max 15 Chars, Unique PIR Reference, could be auto generated by Synergist if required	1/89986	InvoiceNo
Supplier Invoice Reference	Max 30 Chars	9456661	TheirRef
Invoice Document Date	ISO 8601 basic format YYYYMMDD	20170402	DocumentDate
Invoice Accounting Date/Period	ISO 8601 basic format YYYYMMDD	20170331	InvPostingDate
Invoice Type	2 Chars – “Iv” or “Cr”	Iv	InvoiceType
Currency Code	ISO 4217	EUR	CurrencyCode
Exchange Rate		1.1723	CurrencyRate
Net Amount	Currency value	200.00	CurrencyNet
Tax Amount	Currency value	40.00	CurrencyTax
Gross Amount	Currency value	240.00	CurrencyGross
Notes	Text		Notes

Supplier batch update

The ability to update the VAT rate set for the supplier has been added.

Reporting

Opportunities export

Actual recommended charge column added to the export

Miscellaneous

Allow multiple jobs to be exported to MS Project

Previously this could only be done for single jobs.

Linking documents

New elements added to dtssource - first line of job and phase description. These new fields can be used when creating word documents from within Synergist 4D client.