Version 12.2 - Release Notes

Synergist Browser Interface

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Contents

Synergist v12.2 release

Overview

Synergist v12.2 includes enhancements to existing features as well as new areas of functionality. There are also interface behavior changes designed to improve usability - based on user feedback.

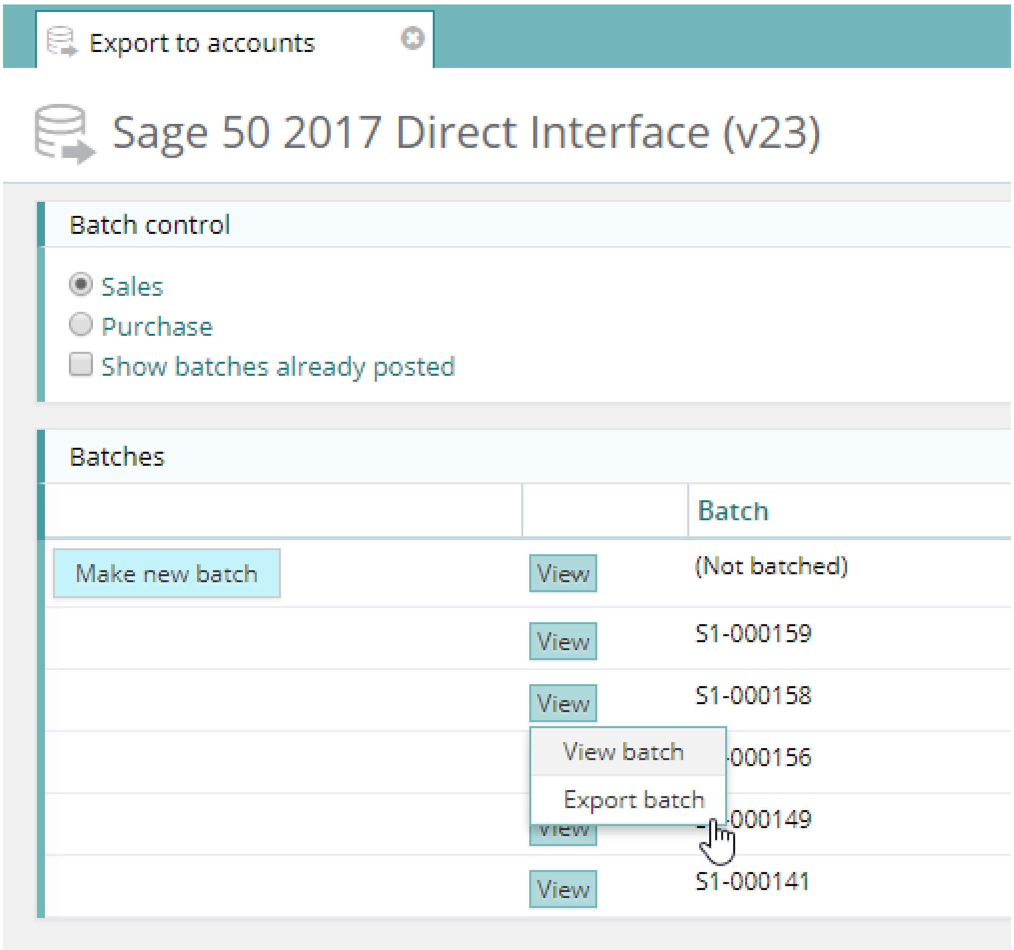
Please note: These release notes relate to the Synergist browser interface only.

Accounts links

Exporting a csv of a postings batch

The ability to export the contents of a batch, or awaiting transactions, to a csv file.

Note: CSV files can be opened in Excel.



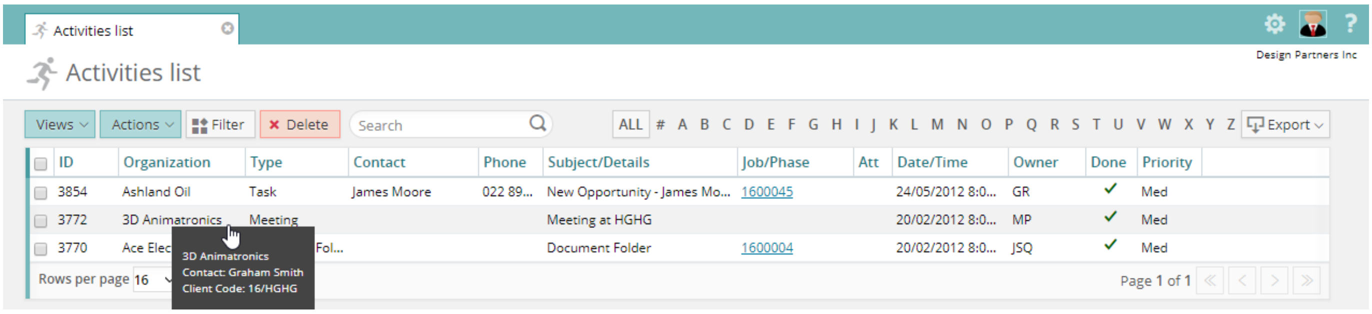
Kashflow integration

2nd reference or job number (depending on settings) now output to the appropriate Kashflow field and are no longer added to the line description.

Activities & attachments

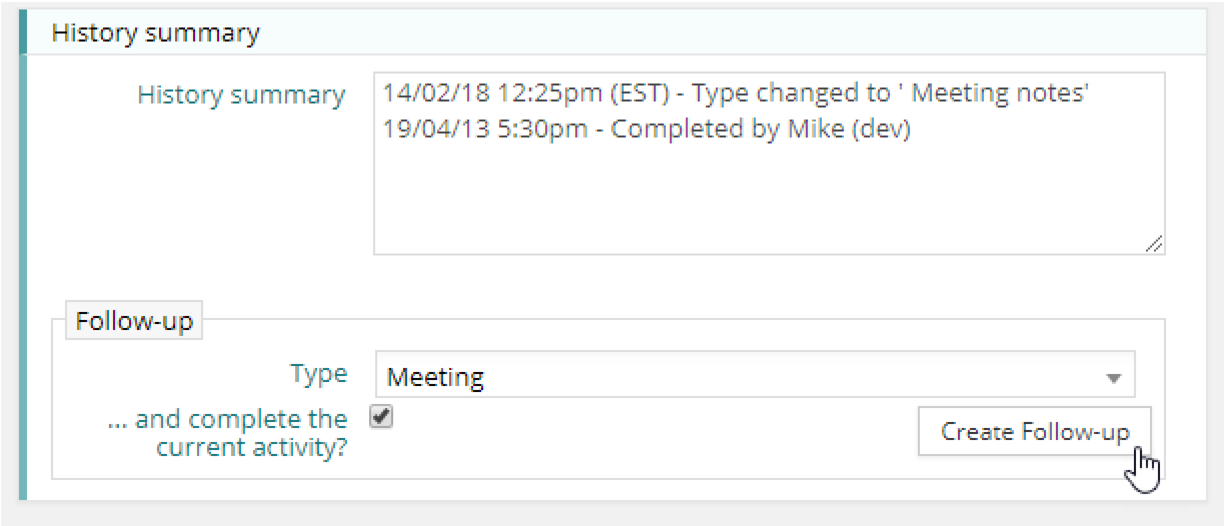
Activity list - redesign

The columns have been redesigned, and hover text added to key fields.



Follow ups – tab added to the activity record

Within an activity you are able to generate a related activity – a follow-up.

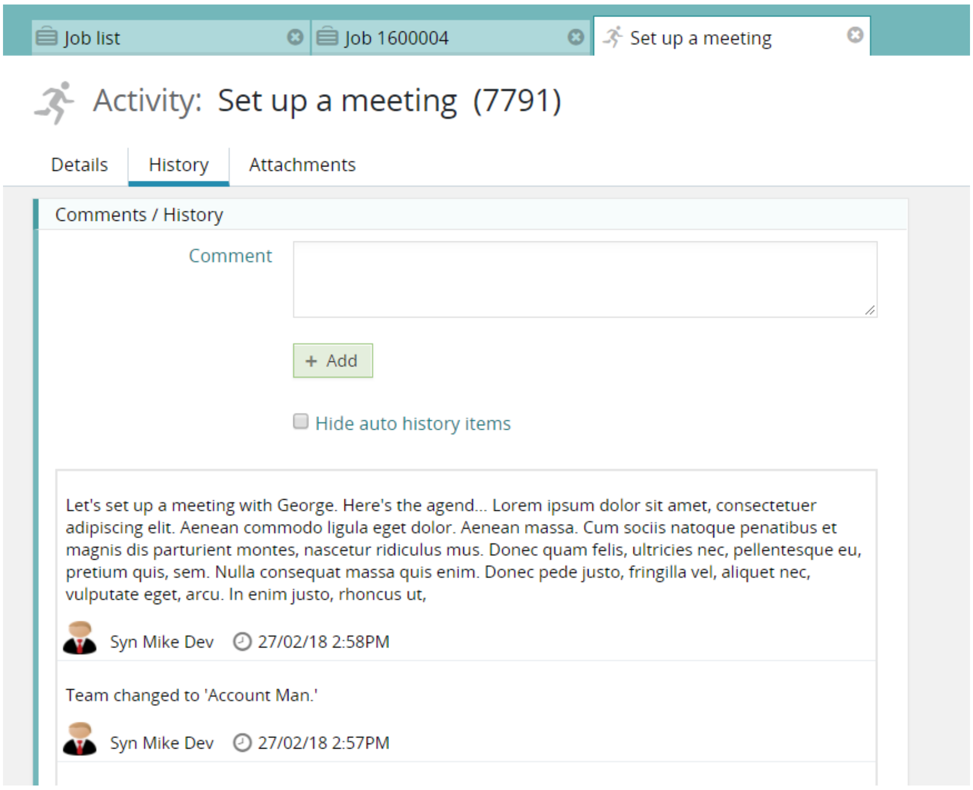


If you have created one or more follow-ups you can track these, and access them, via the new 'follow-ups' tab on an activity record. This tab is only visible if the activity has related follow-up records.

Comments/history - alerts

If the 'immediate alert' flag is set on an activity, any comments added to the activity will send Synergist alerts to the activity owner and secondary owners (called 'others').

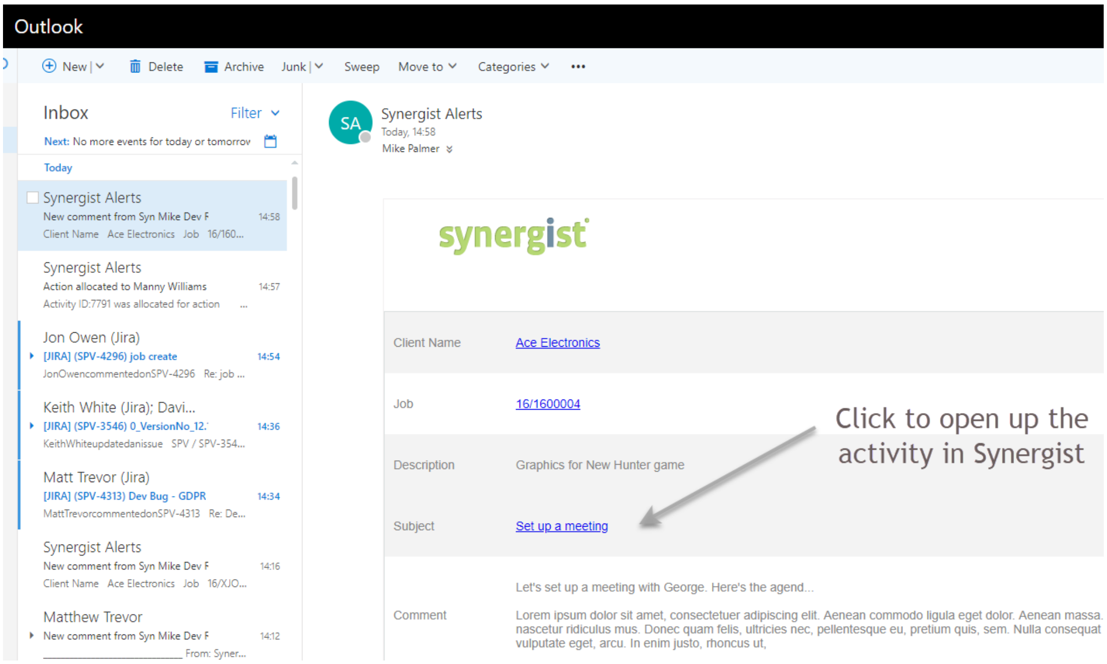
The alert will have links that enable the recipient to open the job/activity to see the rest of the thread.



Email alert

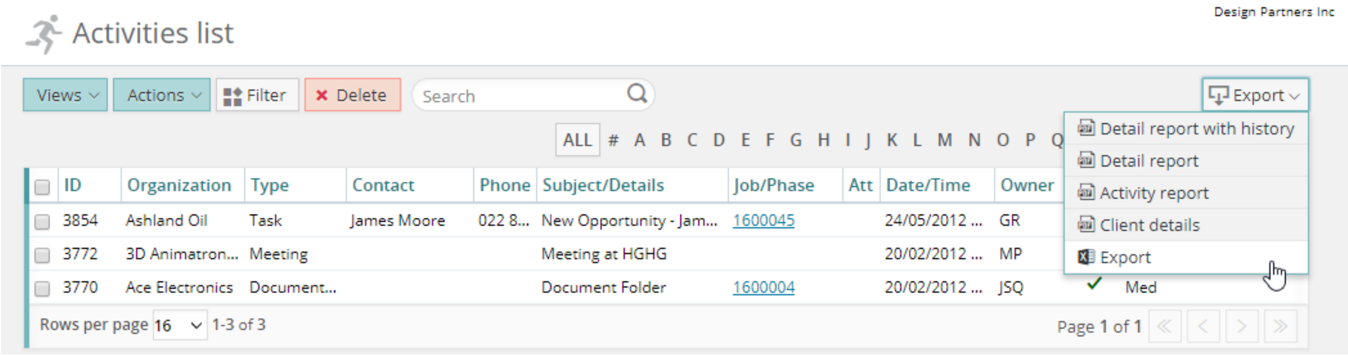
The alert generates an email to all the parties allocated to the activity or related job (e.g. activity owners or internal job contacts or handler).

If the user clicks the links in the email, he/she can open Synergist on the appropriate record. See section on Multiple browser tabs in the 'Advanced features' section.



Addition to the activities export csv

A 'job description' field added to the activities export option.



Billing plans

Changing exchange rate

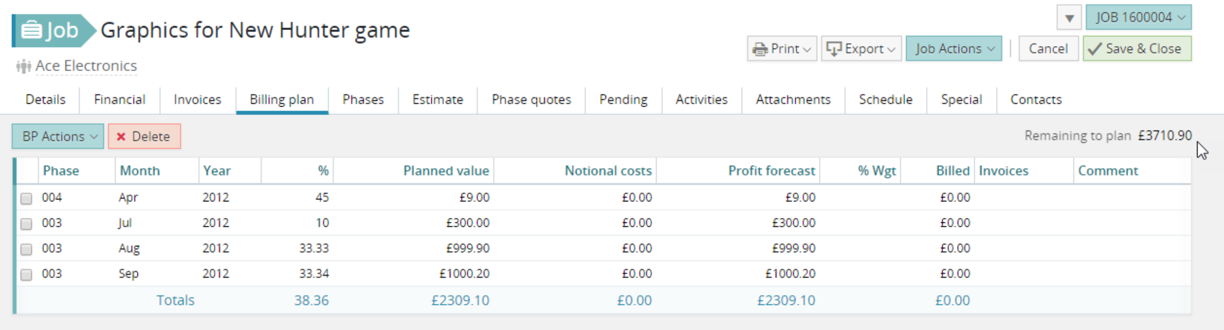
Creating an invoice linked to a Billing plan (billing plans > actions) now allows the user to change the exchange rate.

Billing plan report/export

Additional column added for recognized value.

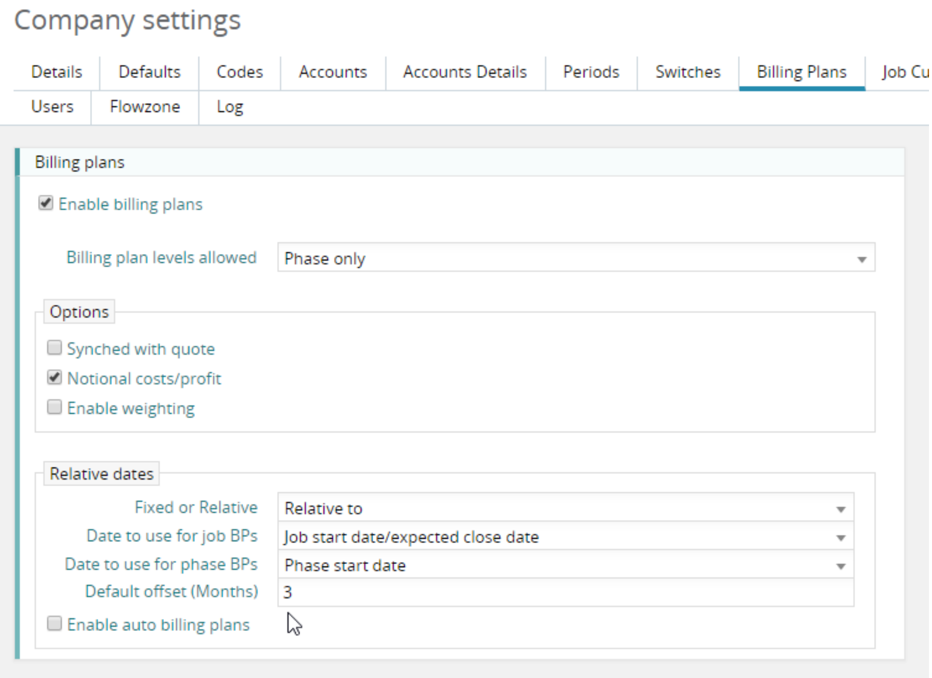
Remaining to plan

The billing plan now displays the amount left to plan in the right hand top corner of the billing plan tab (jobs & phases)



Default offset

A default offset can be set for billing plans in company settings for users who are employing relative dates for their billing plans.

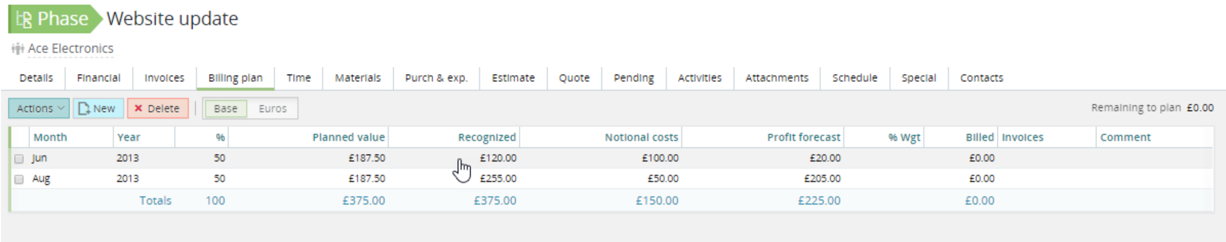


Revenue recognition

It is now possible to incorporate revenue recognition into billing plans. This will only affect systems that are set up to use 'Revenue management'. See the 'Revenue Management' section of these release notes for more information on this feature.

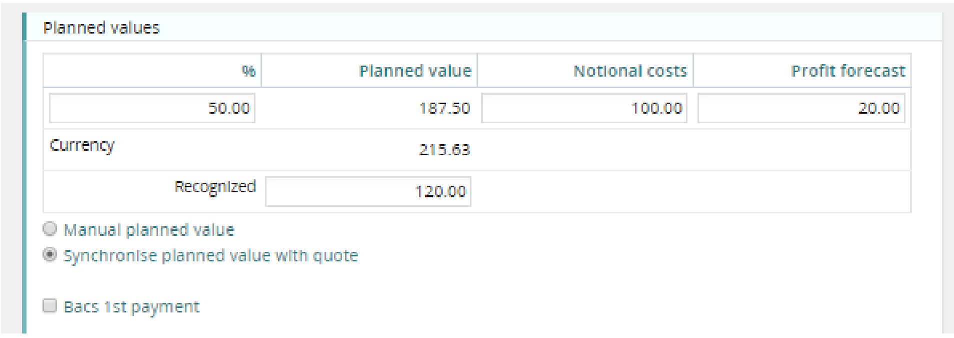
Looking at the billing plan tab of a job/phase, there is as new column that shows how much revenue the user intends to recognize when invoicing each month. The user may wish to recognize the entire billed amount, or perhaps just a portion of the amount billed.

Billing plan tab



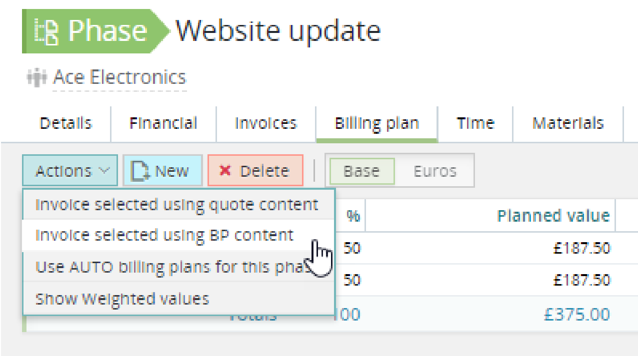
Billing plan item

Opening up an individual plan (typically the plan for as specific month), you can see there is a figure to 'recognize'. The profit forecast is no longer using the 'planned value' it is looking at the recognized value - less costs.



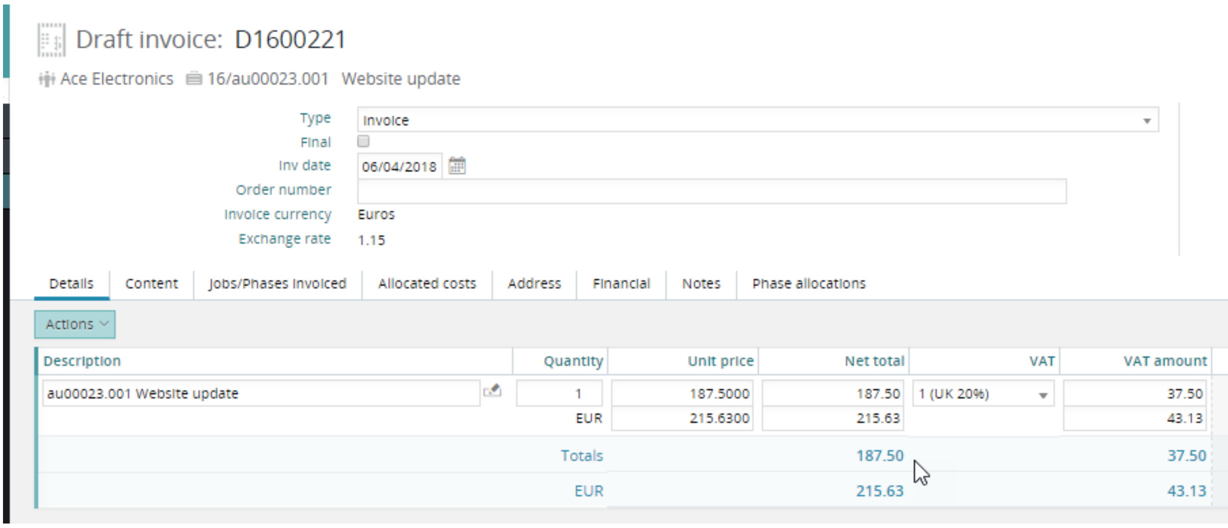
Invoicing the billing plan

An invoice can be generated from one or more billing plan items.



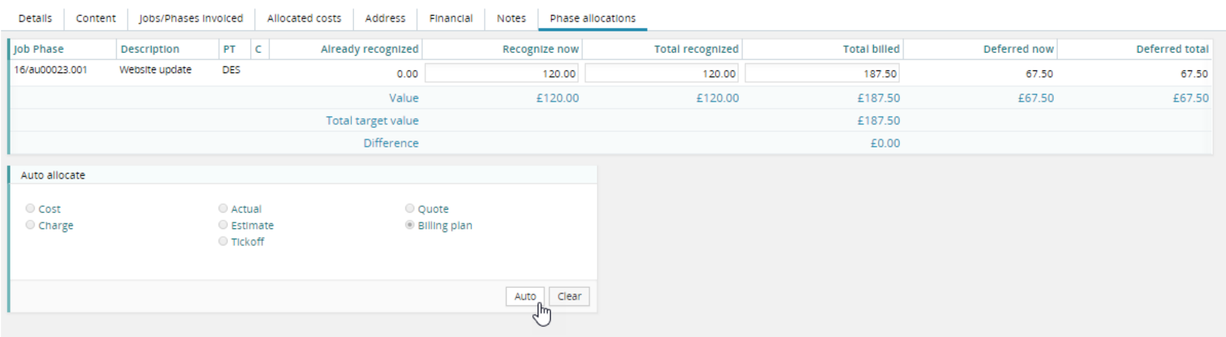
Invoice generated from billing plan

As you can see, the invoice is for the planned value.



Deferring income

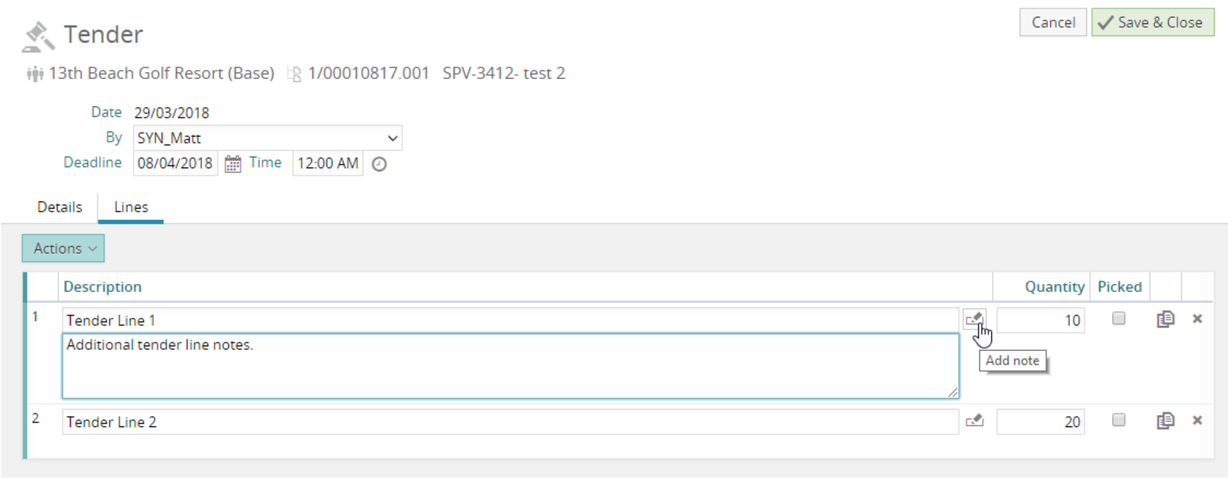
However, on clicking the 'Auto' button to allocate revenue - notice only part of the billed value has been recognized (as defined in the billing plan). The rest of the income has been deferred.



Tenders

Line detail notes

Line detail notes can be opened/closed by clicking on the notes icon to right hand side of line description.



Clients & Contacts: GDPR

GDPR – General Data Protection Regulation

New features have been added to Synergist to help users achieve compliance with the new laws regarding data protection that come into effect in May 2018.

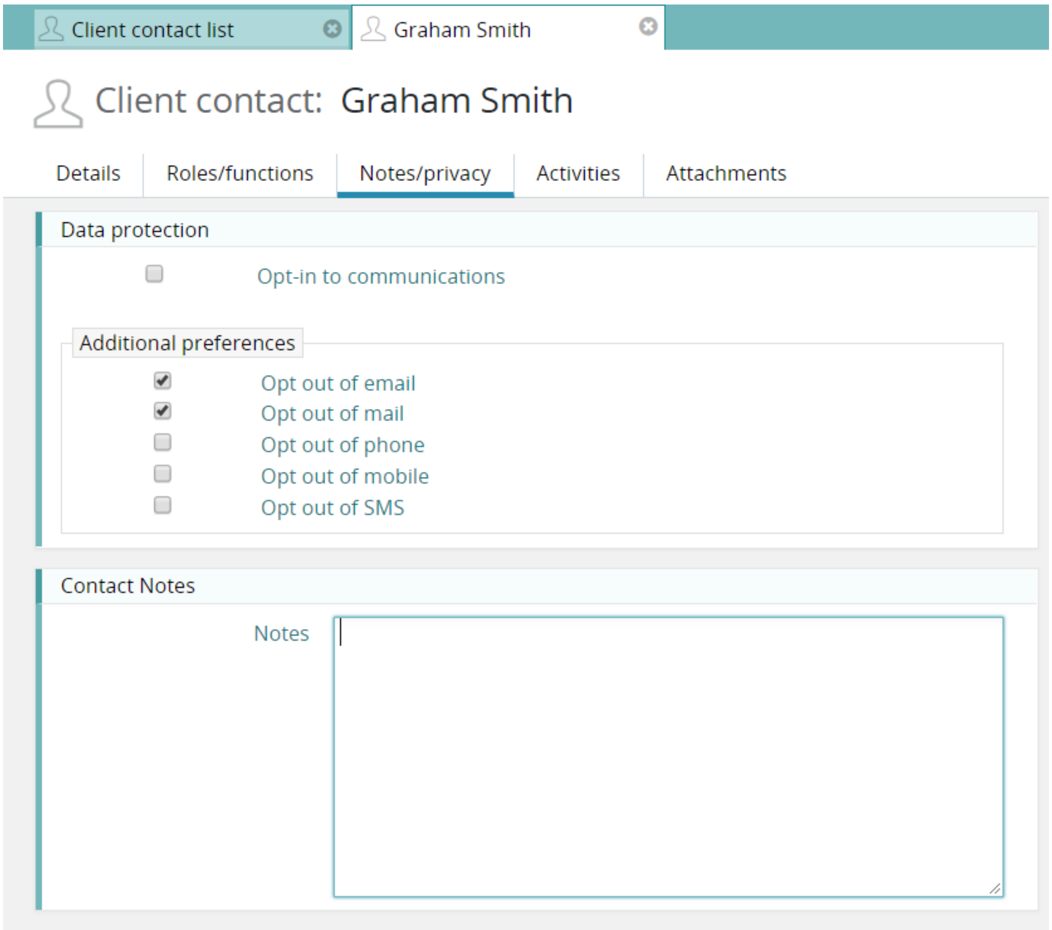
The new features relate to the contacts area of Synergist where you may be holding data that needs reviewing to ensure compliance with the new rules. The first new feature allows the recording of whether a contact has explicitly 'opted in' to communications with your company, when this opt-in authority was obtained, and from which system/source it originates.

It is also important to track how long you have had the authority and whether this has effectively expired – at which point you might want to either get confirmation that the contact still wishes to be opted-in, or you may even wish to clear down any data that is no longer relevant (e.g. social media info, phone numbers etc.)

Since it would be very time consuming to set these new fields manually, we have also added features for enhanced querying of the data, including selecting a batch of contacts by pasting in a list of email address and new batch update features.

The client contact record - Notes/privacy tab

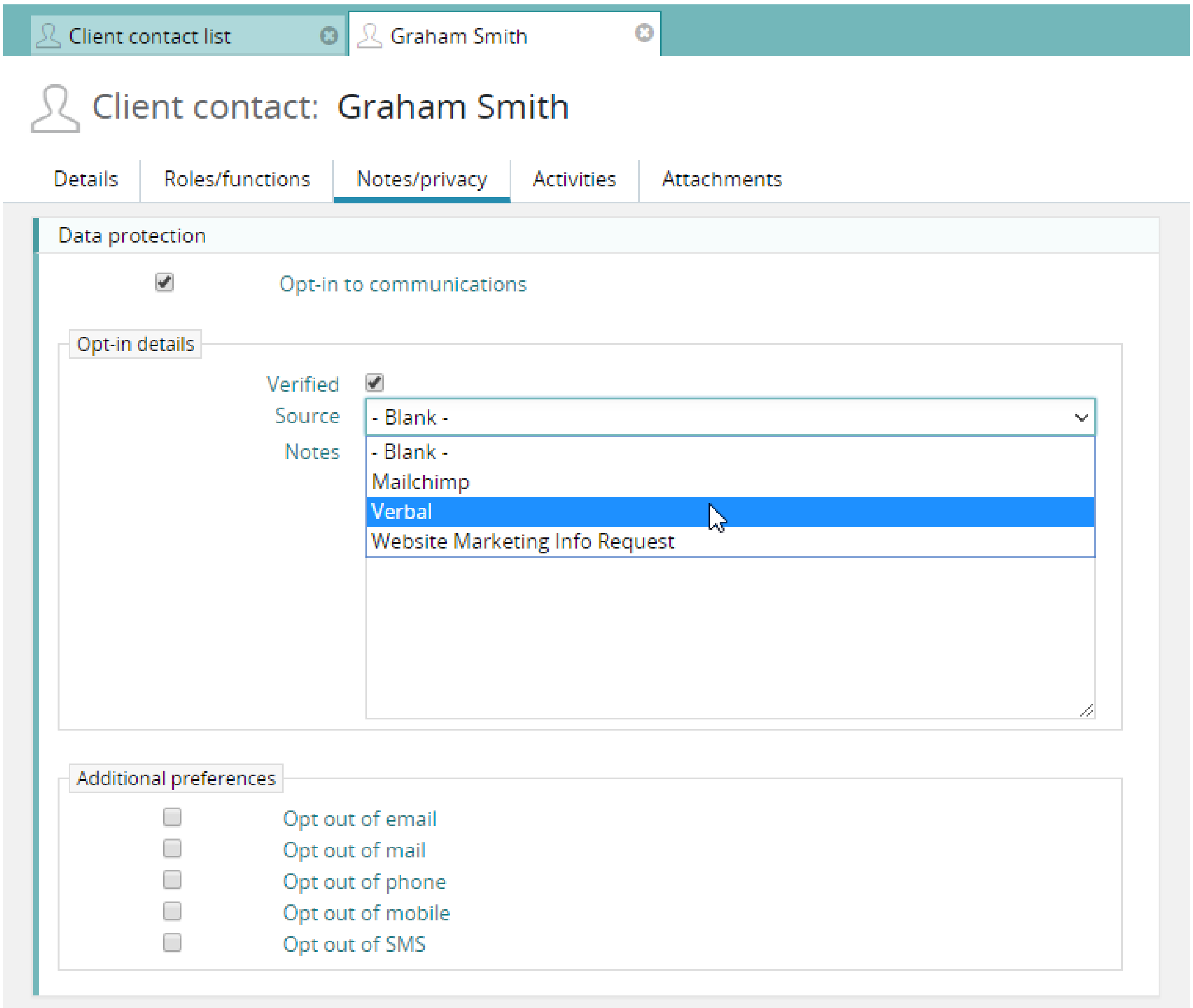
The 'Notes/privacy' tab on the client contact record is used to record the 'opt-in' status of the contact. On upgrading to Synergist version 12.2 all client contact records will be set as 'not opting in'. You will need to decide how you go about getting your contacts to agree to opt in to communications before you can get involved with direct marketing to these people.



Opted-in status

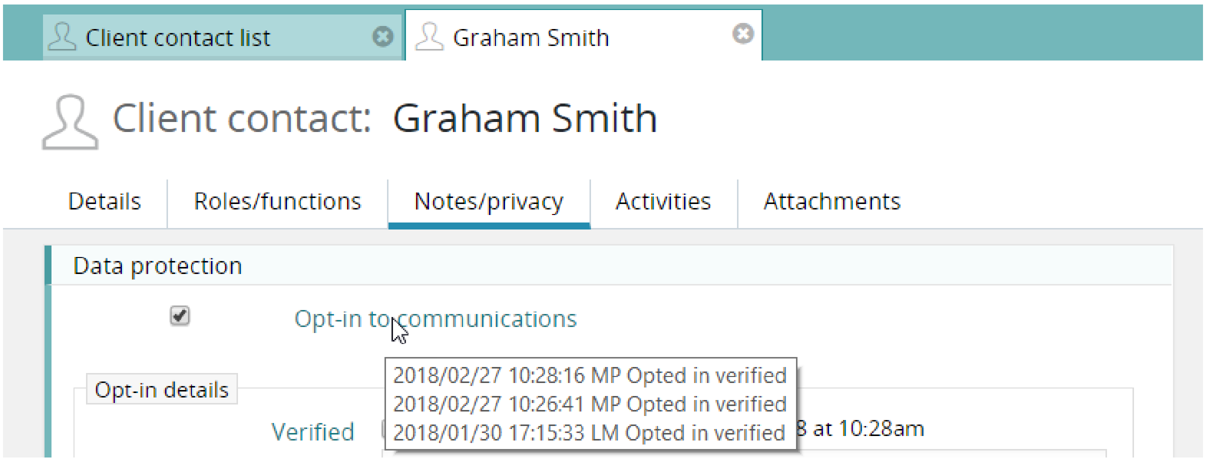
Once the 'Opt-in' check box has been selected (indicating that this client contact has opted-in to communication), additional fields are now displayed.

- Verified
    - Indicates that you have verified the opt-in status
    - The system will also record the date it was verified and by who
- Source
    - Where the source of the verification was obtained
- Notes
    - Additional notes. Useful if verbal authority was obtained
- Additional preferences
    - Your contact may have opted-in generally but has specified that certain communication is not wanted (e.g. SMS). In this section you can define exactly what is agreed to and what is not. If you have already set these 'opt-out' fields in your existing data, they will be retained.



History

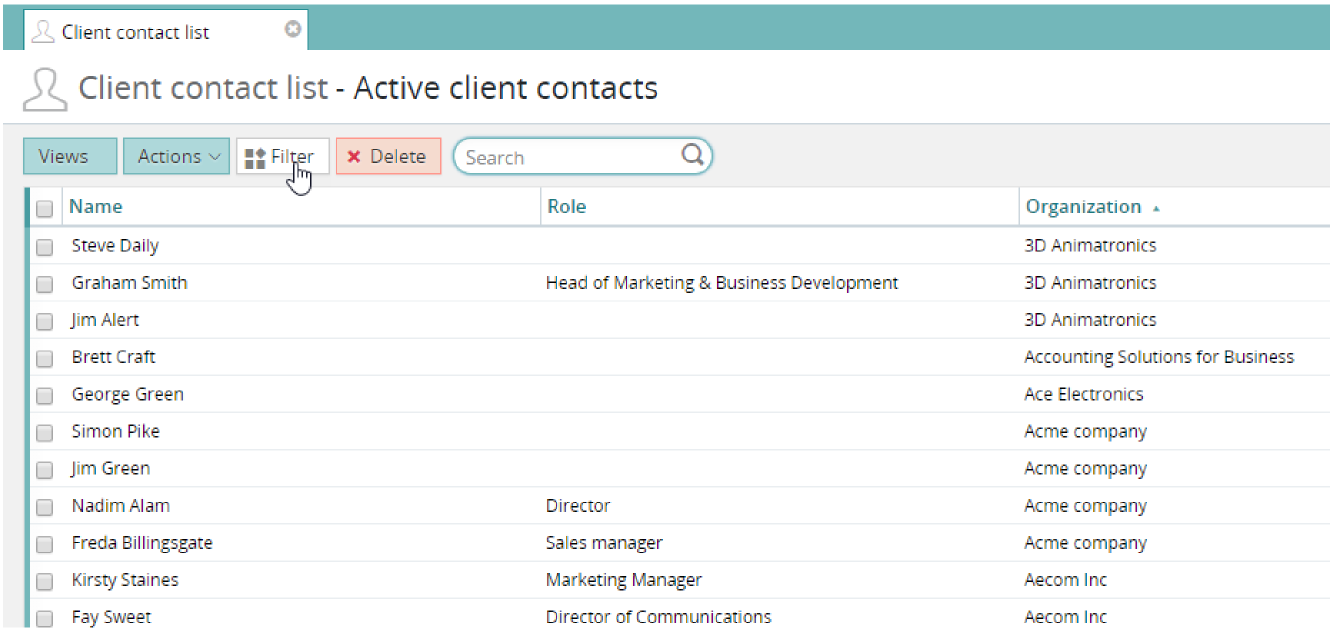
Whenever a change is made to the opt-in status or a record an entry is made in the history for this contact. You can see the changes that have been made previously be simply hovering over the 'Opt-in to communications' label



Batch updating

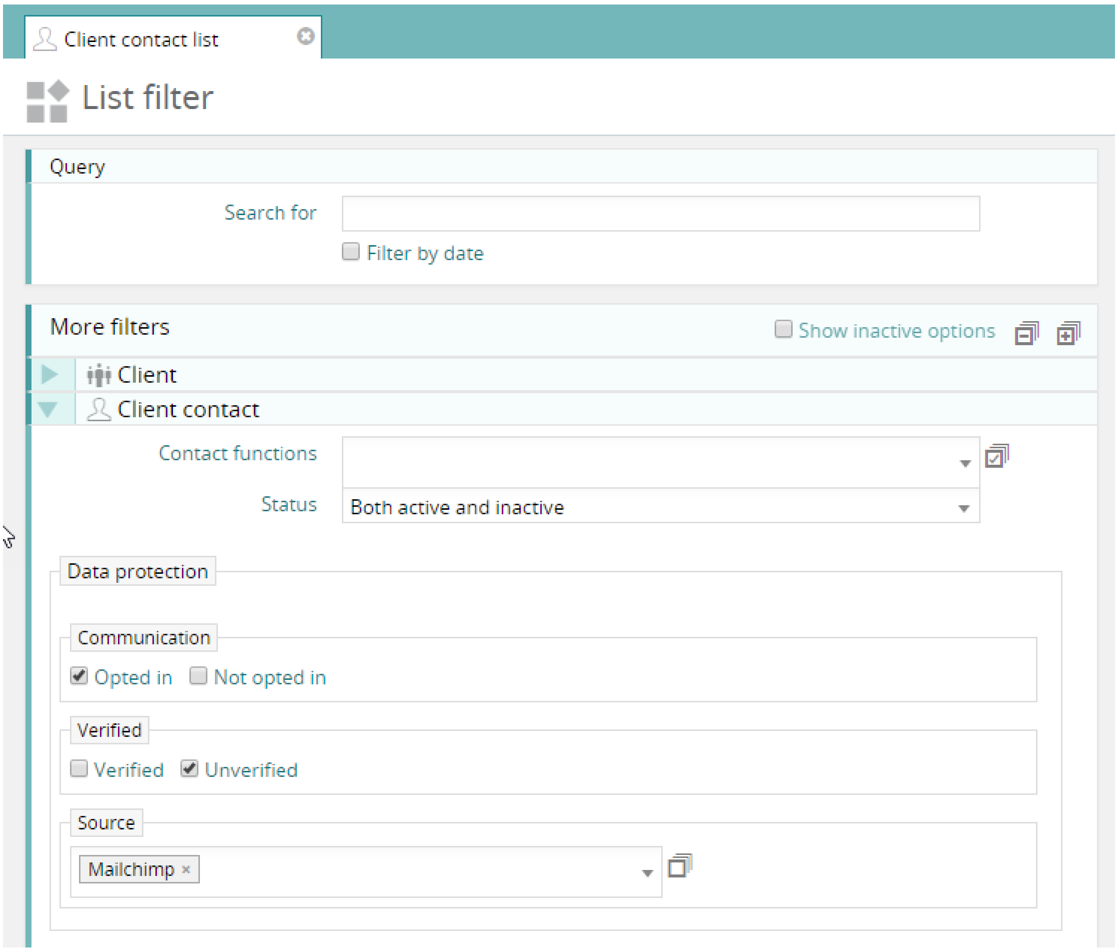
Rather than editing each contact separately, you will probably wish to select a group of contacts and set their privacy settings using batch processing.

This is a new feature on the actions button of the 'Client contacts' main list.



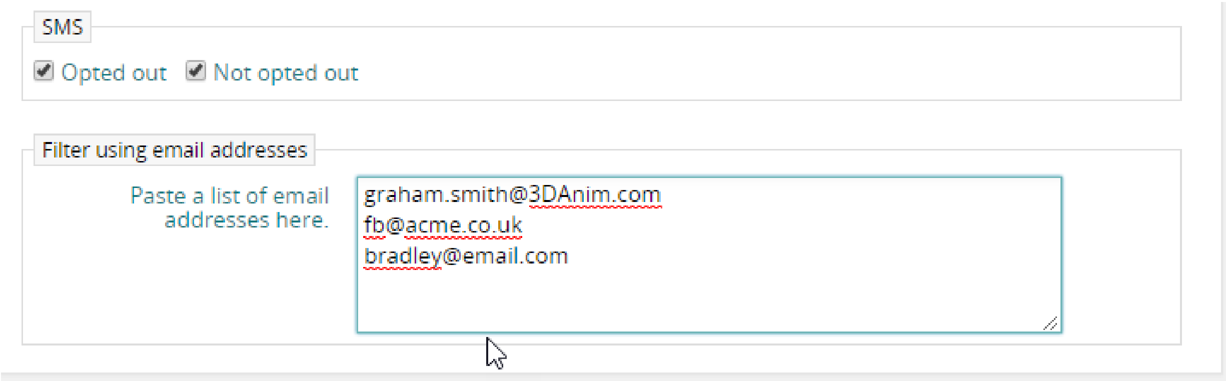
Using the filter

By using the filter, you can select a specific group of contacts. In this example all contacts would be selected where 'opted-in' has been set but they have not been 'verified'.

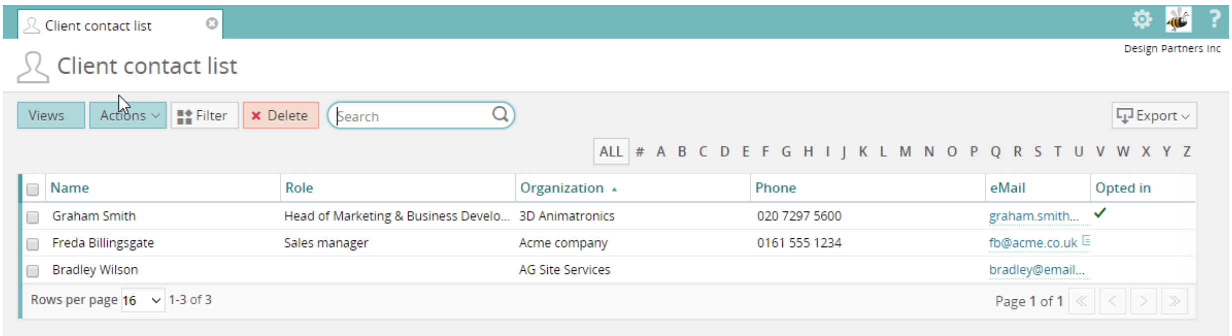


Selecting by email address

If you would rather select the records you wish to process by simply pasting in a list of email address that you may have obtained from an external service – you can do this instead of applying filters. Just select the view 'Active contacts' and then paste in the email addresses for the contacts you are interested in processing.

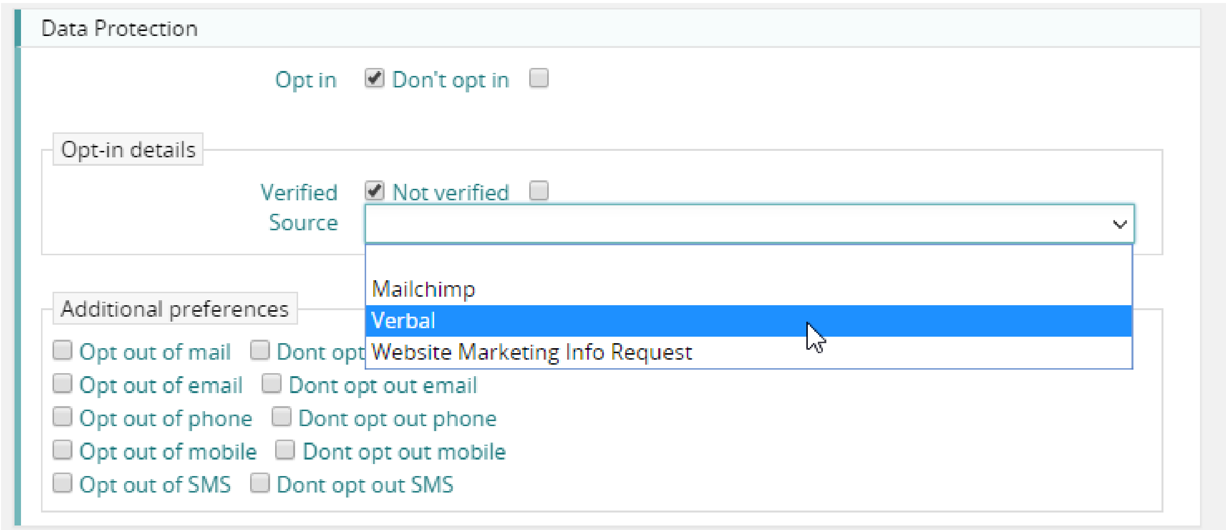


On clicking 'Apply filter' the selection of contacts is now reduced to the contacts on the system that have the email addresses pasted into the filter.



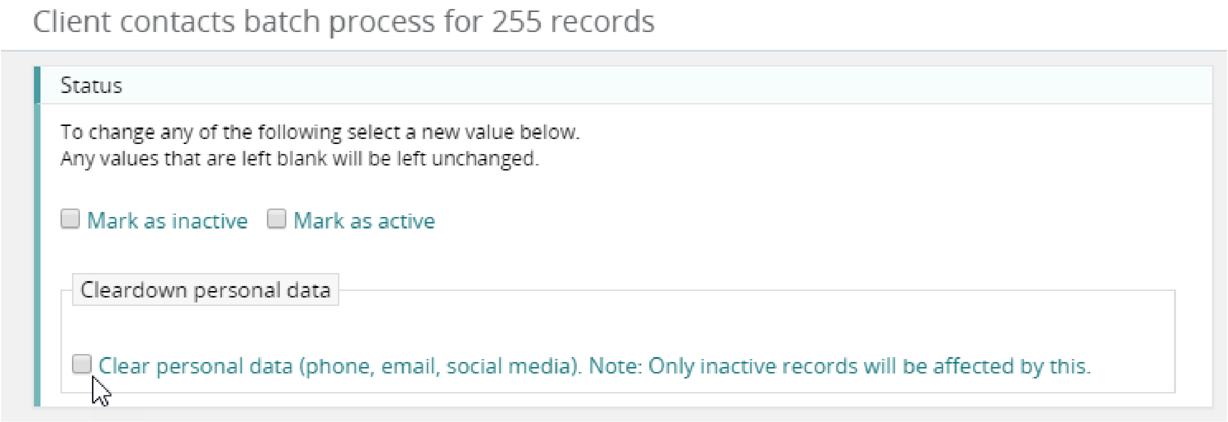
Selecting the changes you wish to apply

To batch update the selected records click 'batch update' from the 'Actions' button. You can now select the changes you wish to apply to the selected records. In this example the selected records will be set to 'Opt-in' status and 'Verified'. The source will be set to 'Verbal'



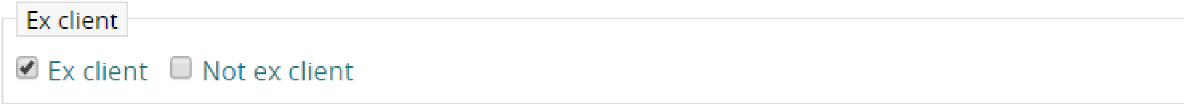
Clearing down old data

Using the same batch update feature it is also possible to clear down data you feel you should no longer keep due to data protection issues. This can be done by marking the contact as 'inactive' and applying the 'cleardown' option.



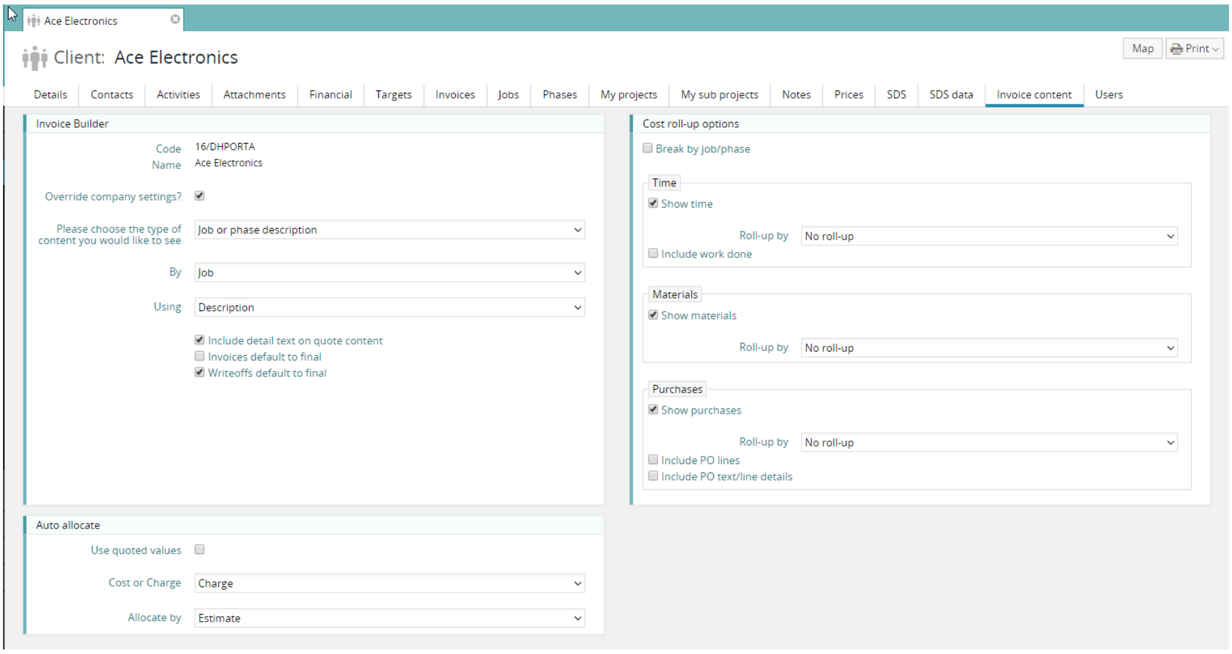
Ex clients – filter option

It is now possible to filter / create views that list prospects that used to be clients.



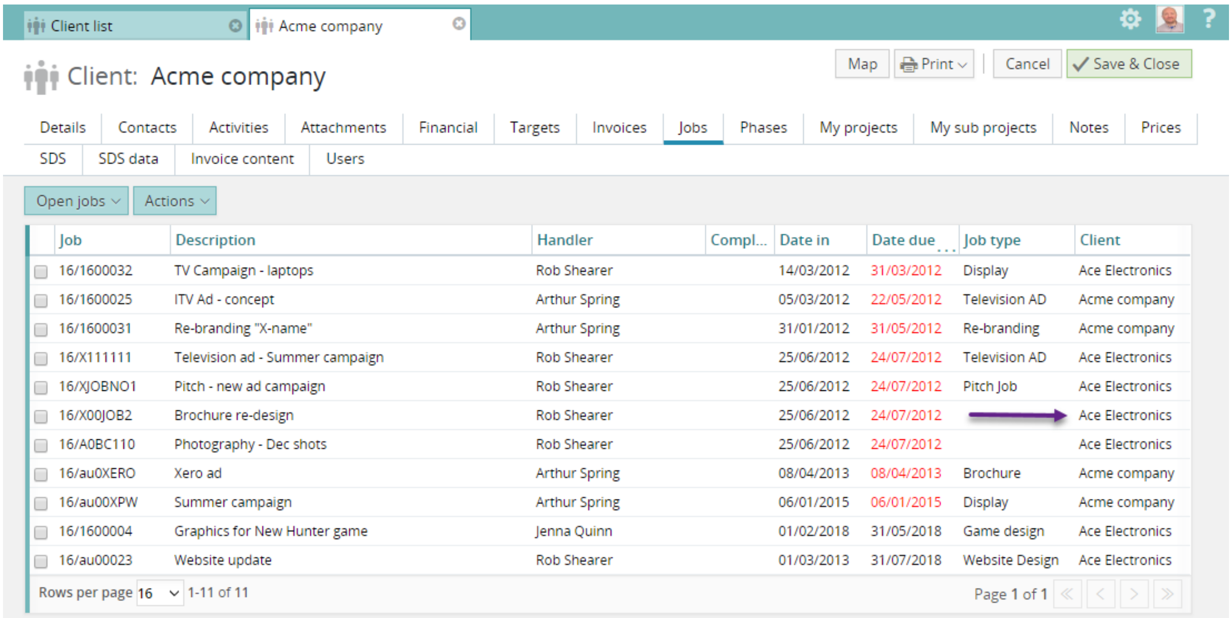
Invoice content builder

Overriding the standard invoice build for a specific client. New tab added to the client card.



Linked clients

Jobs for linked clients appear in the job and phase lists of the client card. The far right column shows the client name to differentiate the jobs belonging to linked clients.



Calendar bookings

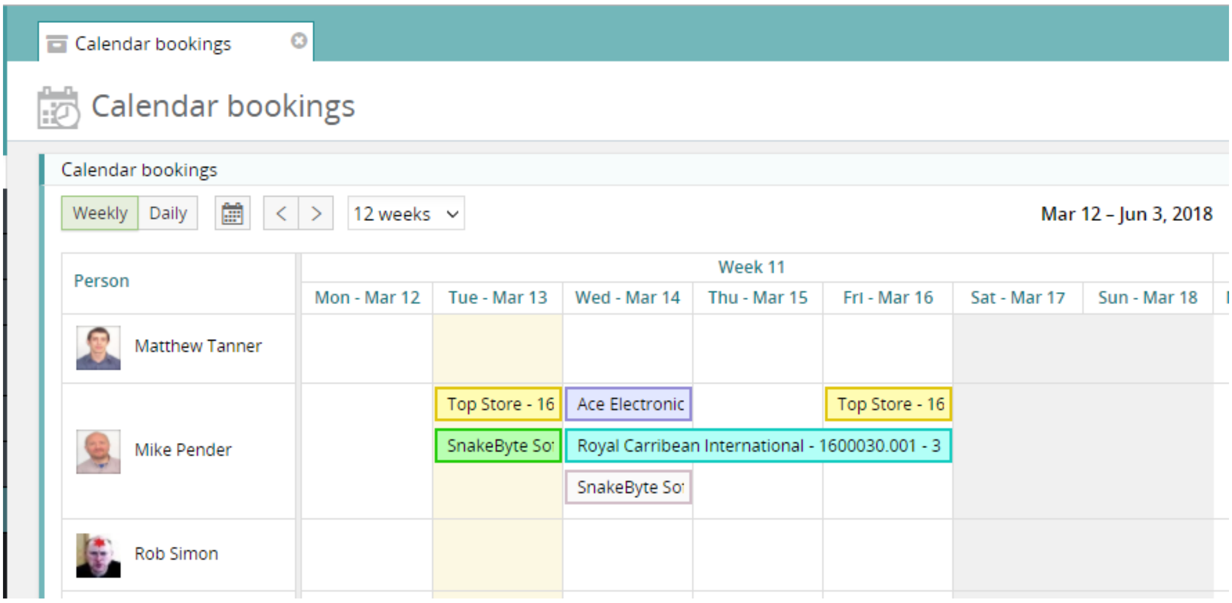
New loading view

The calendar view can be switched between 'Booking view' and 'Loading view'

The booking view is the standard view from which the user can add new bookings to the calendar and move them around with drag & drop. With the booking view, it is not always easy to spot where a staff resource is over or underutilized. This is particularly problematic in the weekly view. Staff may have multiple bookings on the same day, and some of these bookings may span several days.

Standard booking view

In this example, one of the staff resources has several bookings over a period of 4 Days. It is not clear whether he has any spare capacity, or if he is overbooked.



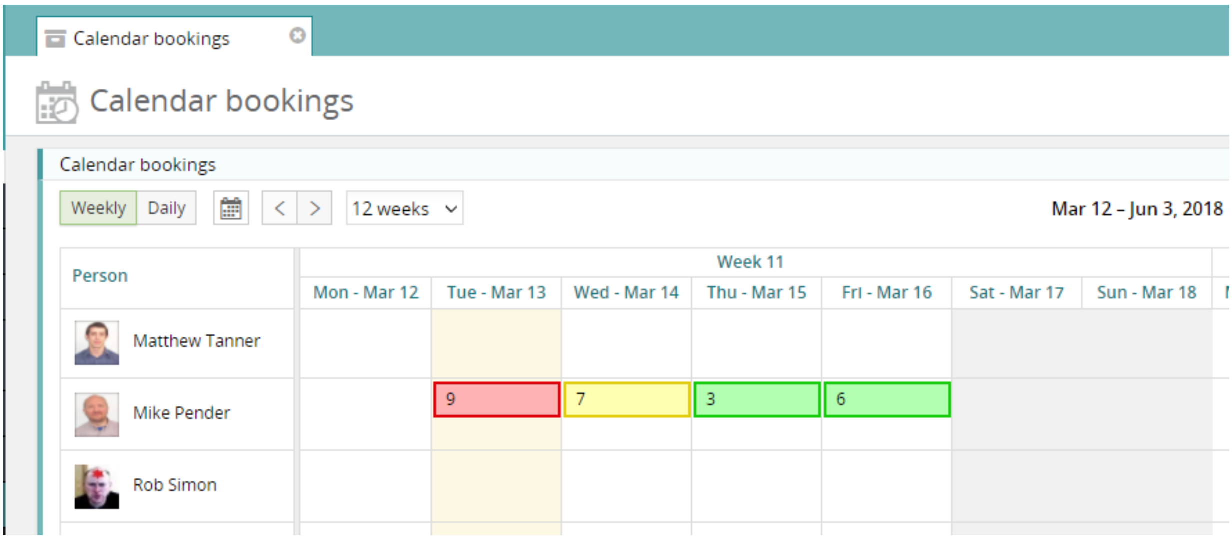
The loading view

If we switch to the new 'loading view', the situation becomes immediately clear.

The color coding indicates that this resource is overbooked on the Tuesday, is fully booked on the Wednesday, and has spare capacity on the remaining days of the week.

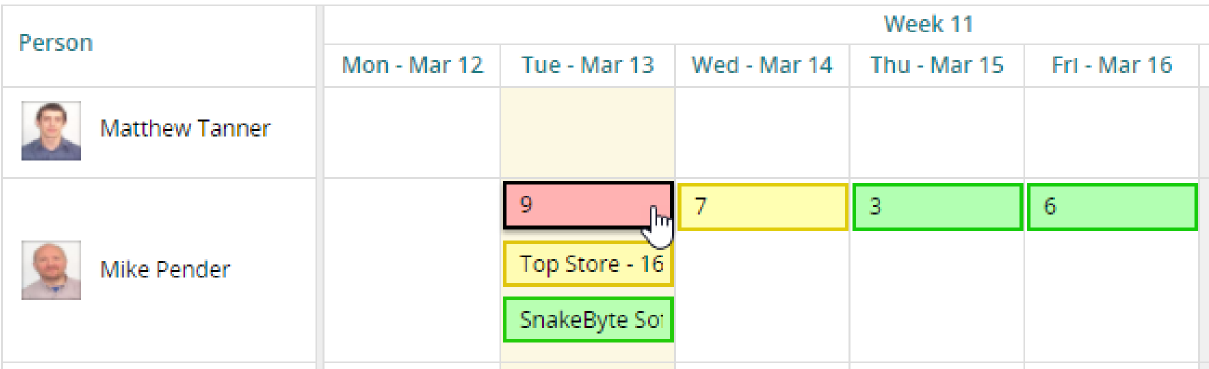
Key:

- Red = Overbooked
- Amber = All available time booked
- Green = Spare capacity available

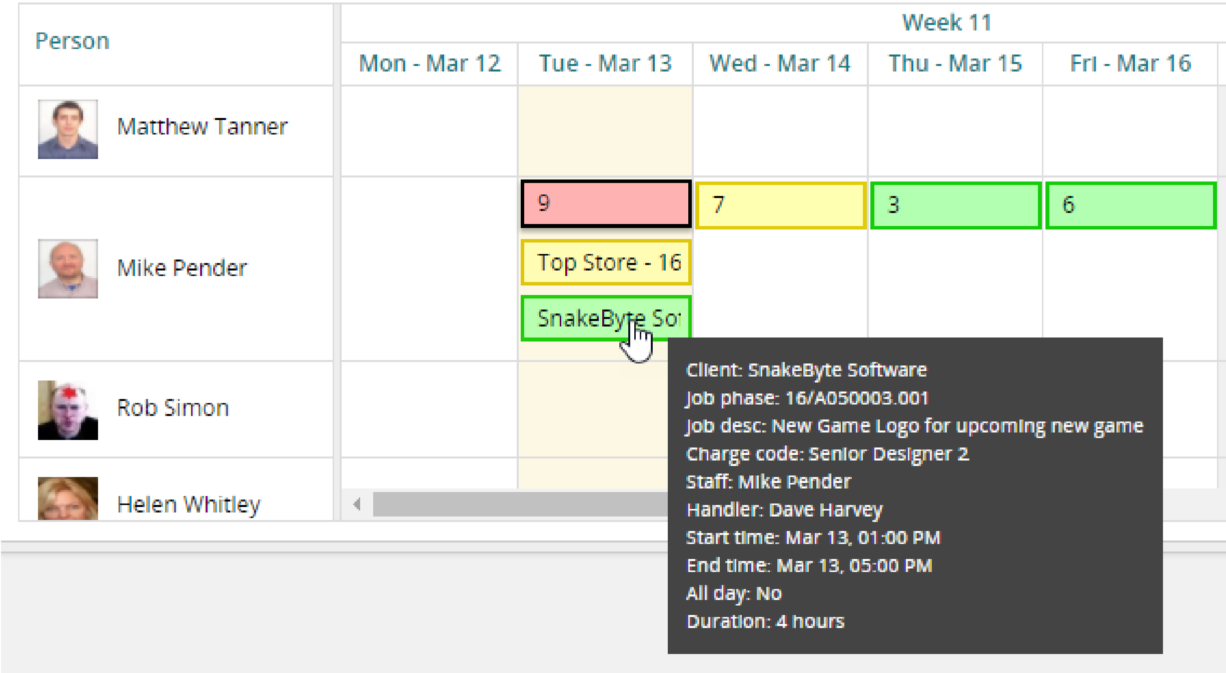


Inspecting the loading

To inspect the bookings, the user can click on the cell that is overloaded and take a look at the bookings affecting this time period.

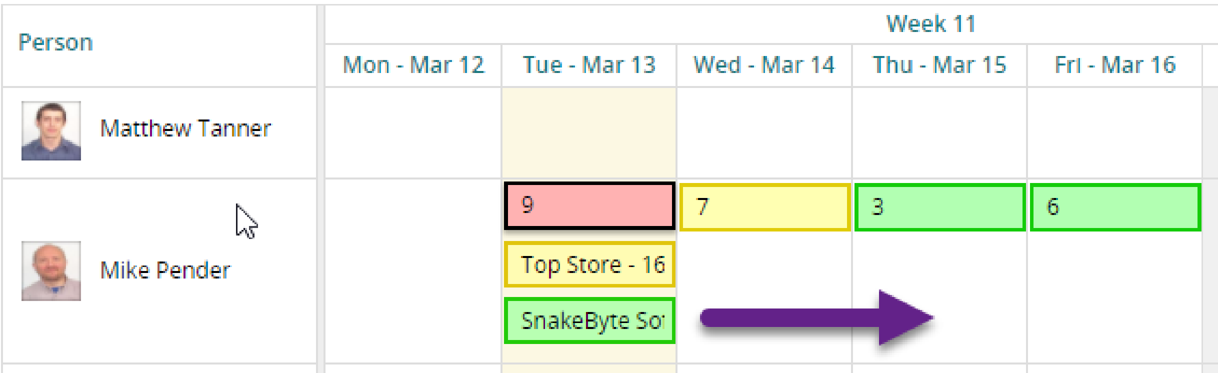


The user can now hover over the booking to ascertain its duration to decide if moving this booking is a viable option.

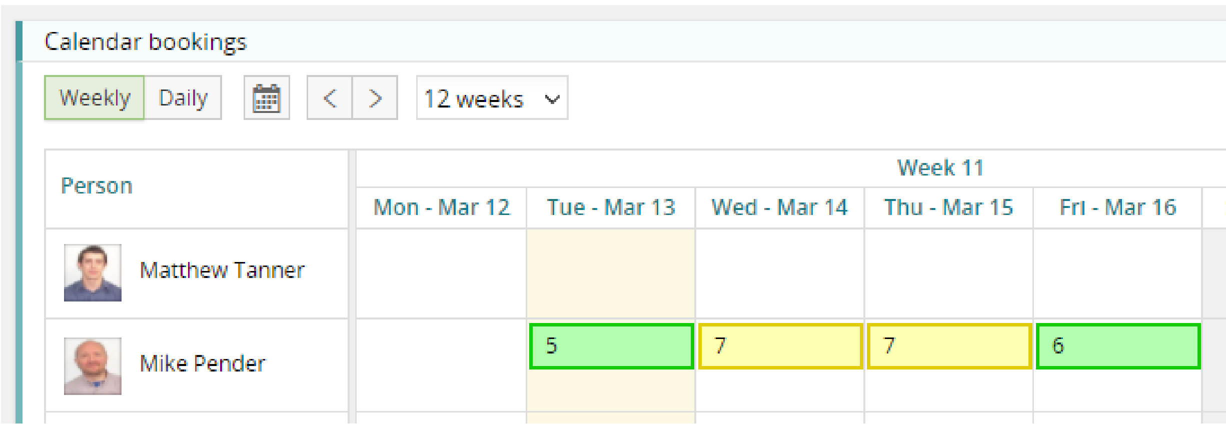


Adjusting the loading

The booking can be moved by simple drag and drop.

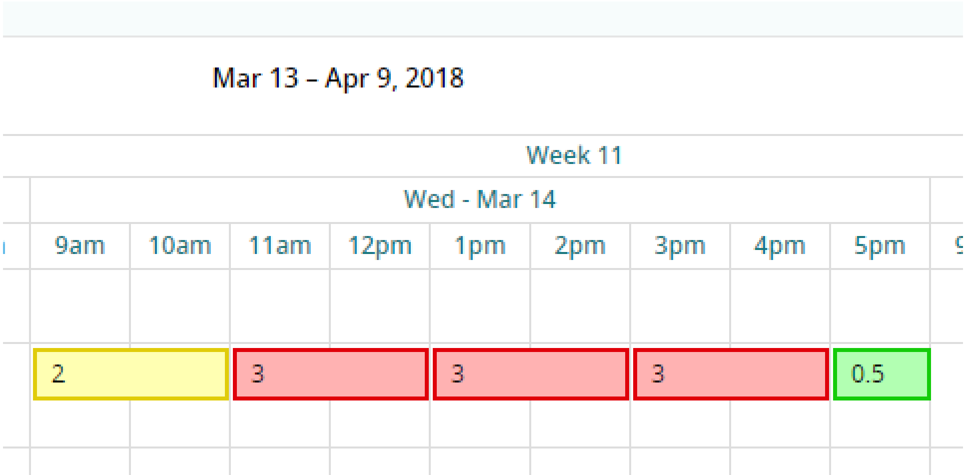


The calendar now displays the adjusted loading. In this example, the work has been correctly distributed across the available time for this staff resource.



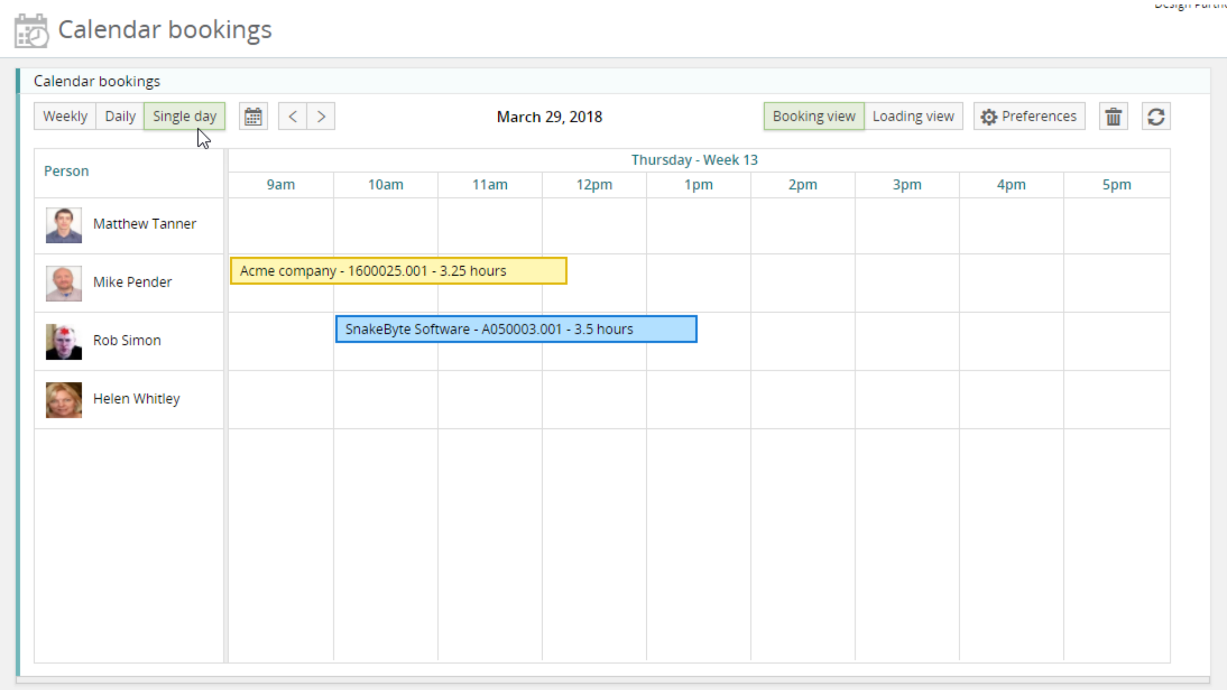
Daily view

All the loading features are available in the daily view. Additionally, in the daily view you can either have a single block representing the entire day (as per the weekly view) or, alternatively, break the day into multiple time slots. In this example, 2-hour time slots have been selected. The time slot options can be set in the calendar user preferences.



Single day view

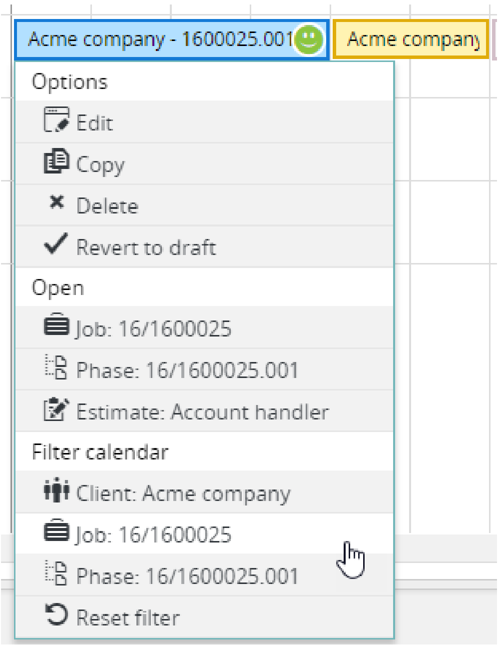
You can now filter the view to show just a single day.



Filtered view

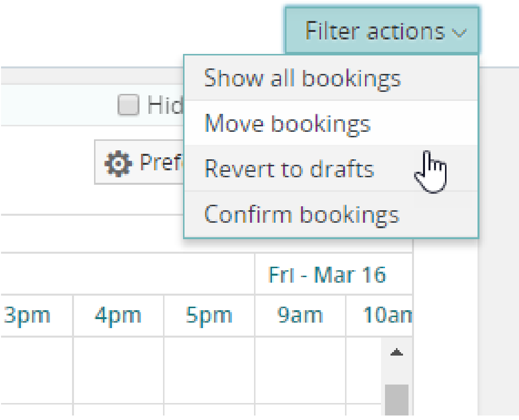
It is possible to filter the calendar view so that only bookings for a particular client/job/phase are displayed. This is done using the right click contextual menu or by accessing the menu via a job/phase.

Filtering for a specific job.



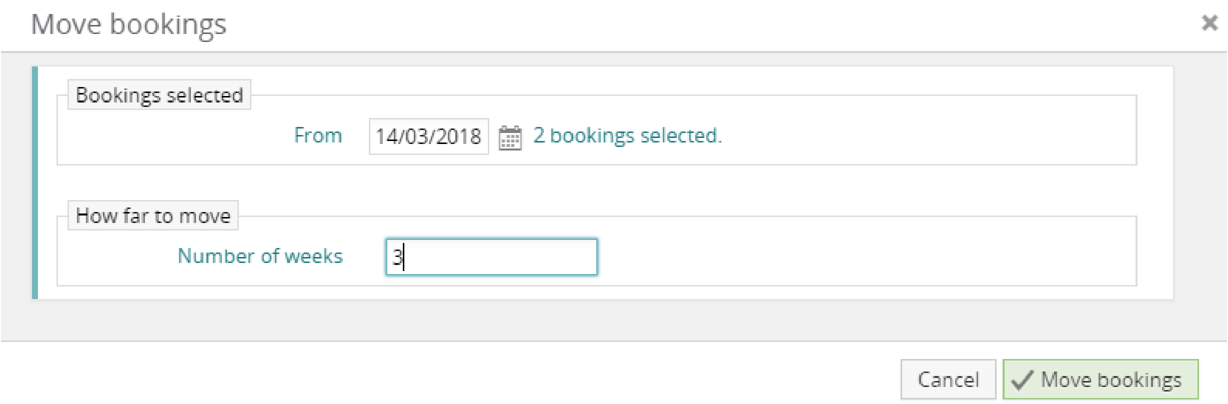
If you have chosen to filter the view you are able to perform certain actions on all the selected bookings.

- Show all bookings (remove filter)
- Move bookings
- Revert to drafts
- Confirm bookings (set as non-drafts)



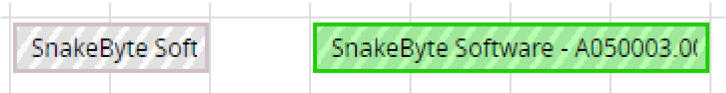
Moving bookings

Selecting this option will open up a dialog box. You can choose to move the bookings in the current filter forward or backwards a number of weeks. The system defaults to only selecting items from today's date.



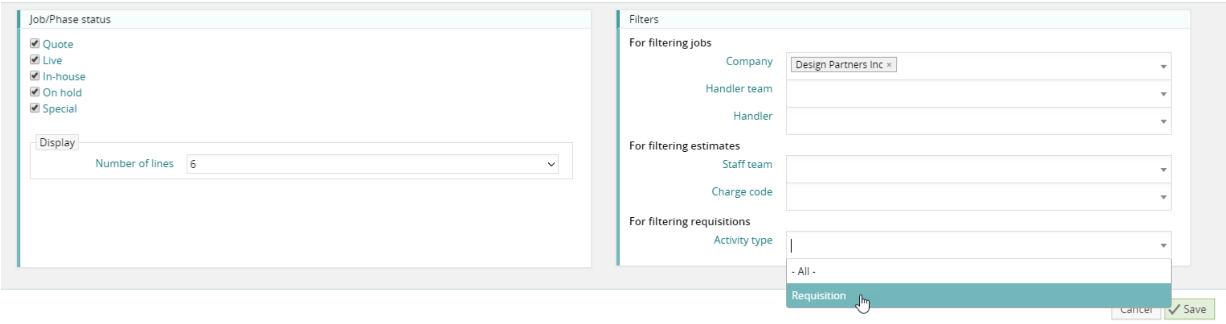
Revert to drafts / confirm bookings

If you select 'Revert to drafts' this will change all the bookings in the filter to be 'draft bookings'. A draft booking does not appear in the user's 'MyCalendar' view, and it is displayed with a hatching effect in the view. Confirming a booking makes the booking a normal 'non-draft' booking.



List preferences

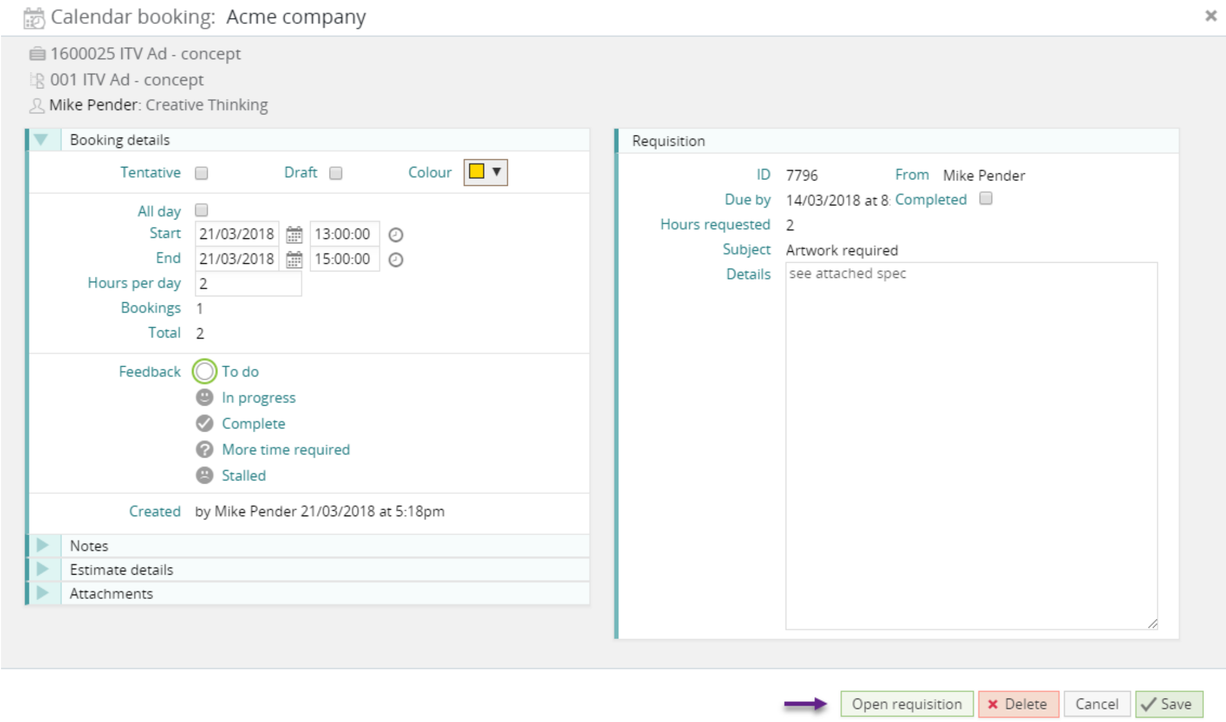
The preferences form (which is user specific) provides a way of filtering both the job estimates and the requisitions lists.



Requisitions

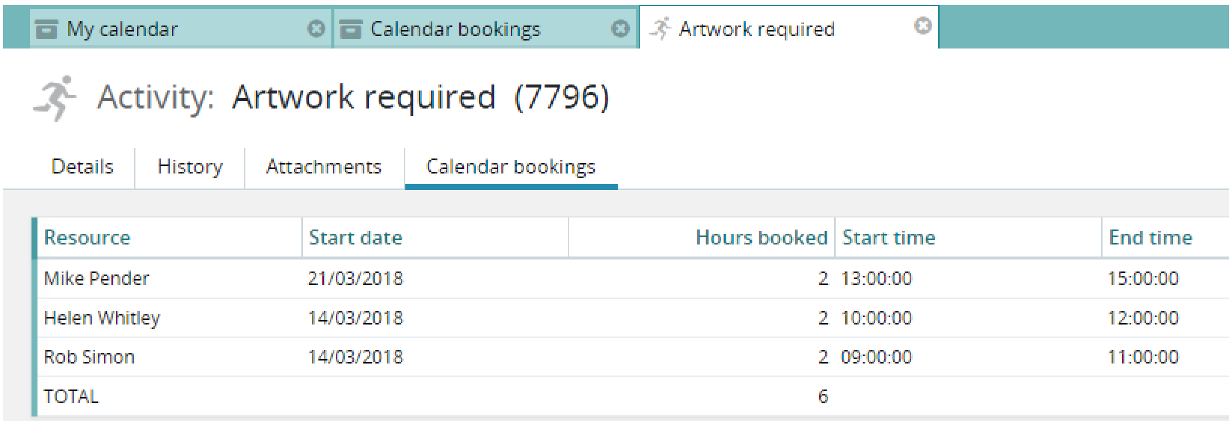
Open requisition

Button added to the calendar booking input form. This will open the full requisition in a new tab.



Calendar bookings tab

The requisition activity record now has an additional tab. The user can see a list of bookings for this particular requisition

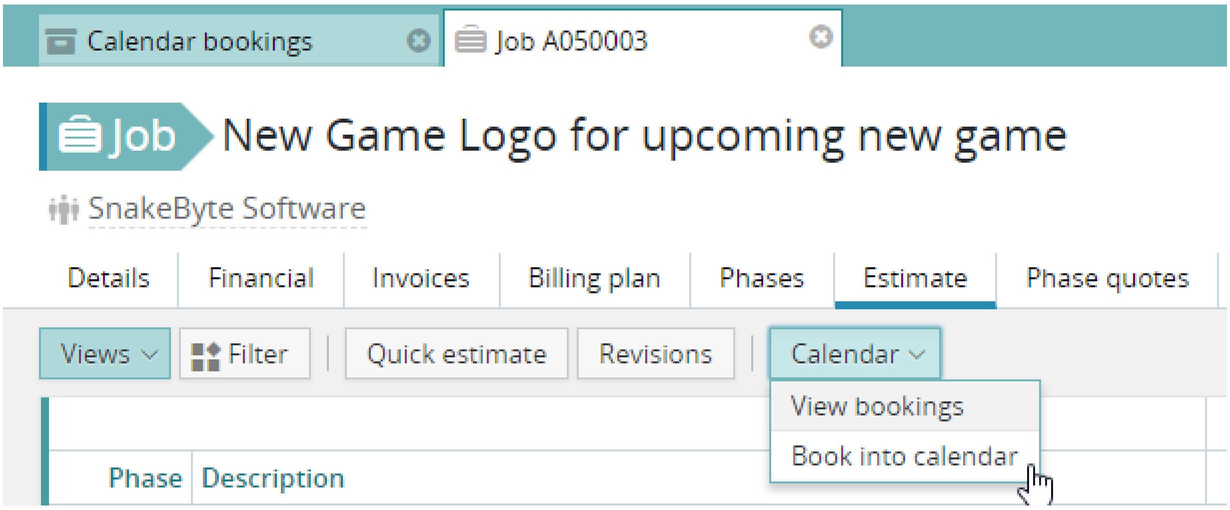


Accessing the calendar

From a job / phase estimate tab

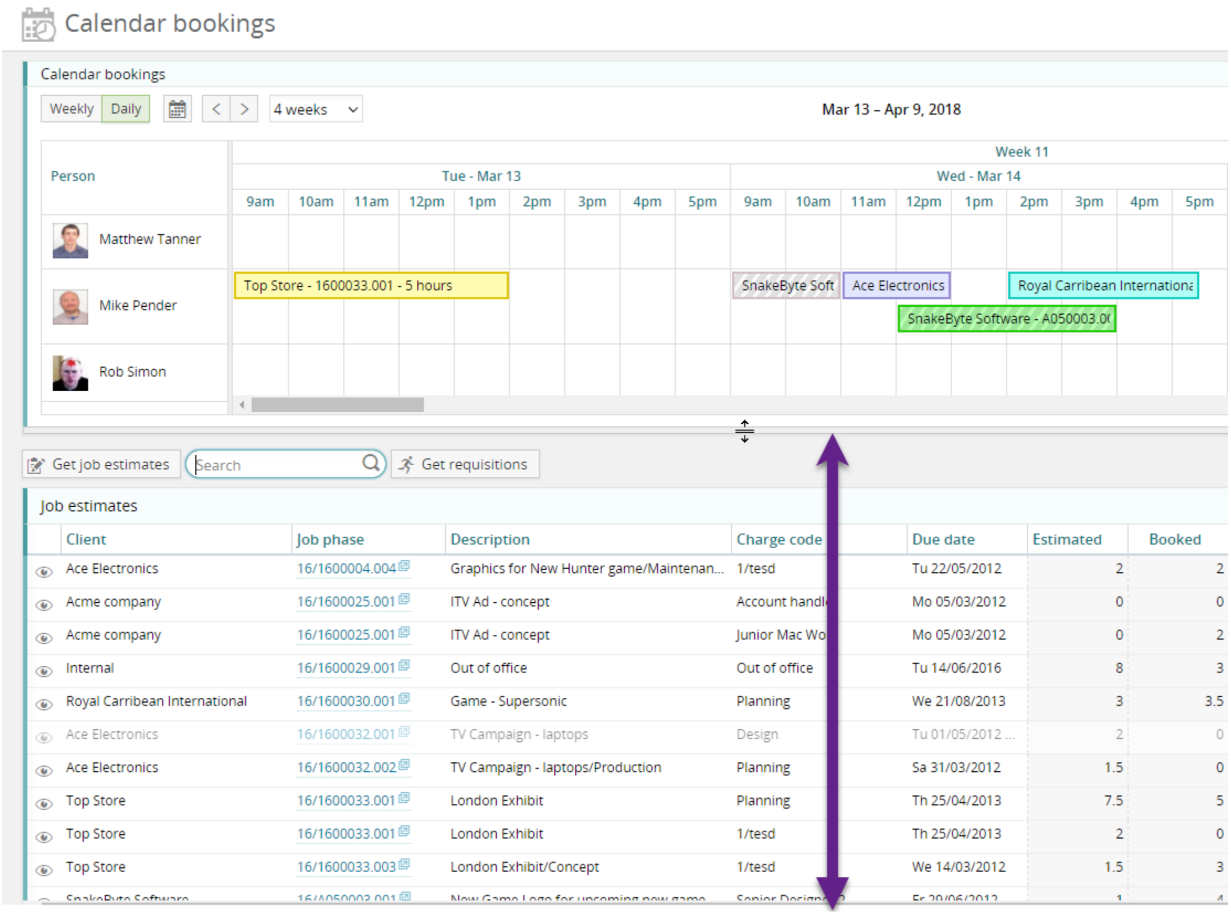
It is possible to access the calendar from within a job. The user can view the bookings for this particular job/phase in which case the calendar is opened in 'filtered' mode. If the user has been given access rights to actually book items into the calendar he/she can opt to 'Book into calendar'. If this option is selected the calendar is opened in non-filtered mode (bookings for all jobs will be displayed), but the job estimate selection list below the calendar will be filtered to only show estimates / requisitions for this particular job/phase.

Note: Users can be given partial booking access rights. For instance, they may be allowed to create draft bookings only.



User interface enhancements

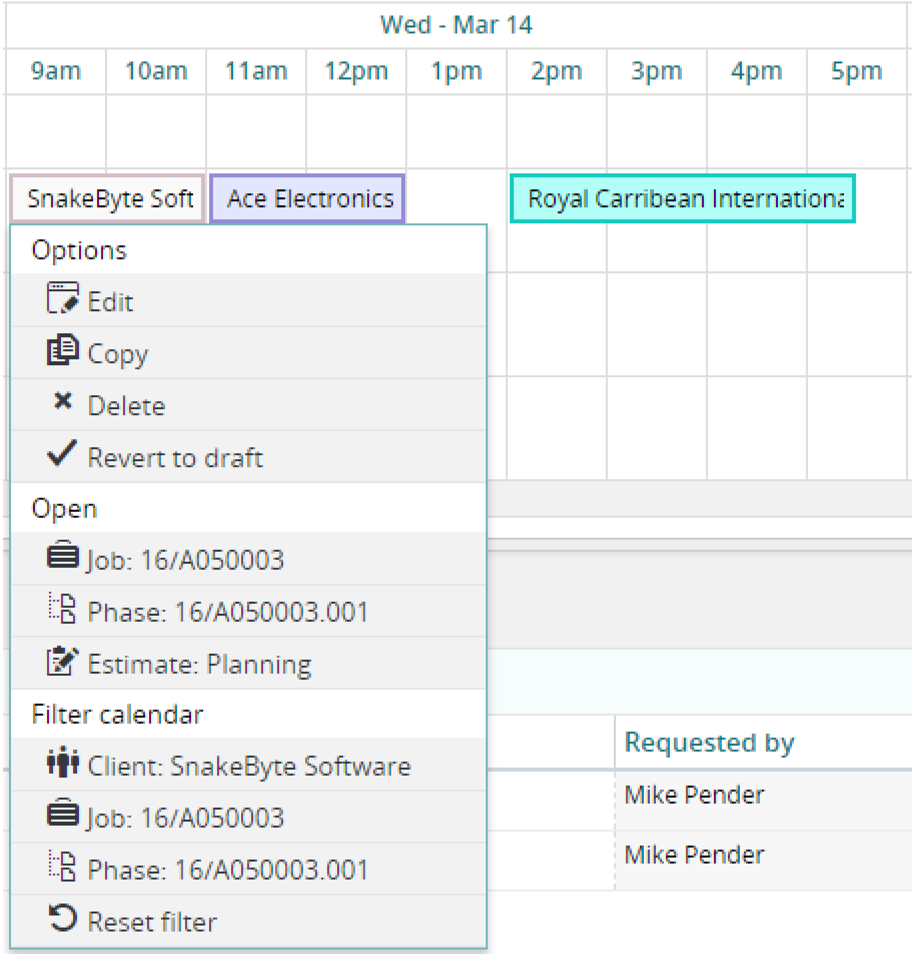
By dragging the splitter up or down it is now possible to increase the number of rows shown in the lower area of the screen



Calendar booking – right click menu

Right clicking a calendar booking will produce a contextual menu to allow some useful actions.

- Edit – opens up the booking input form
- Copy – duplicate the booking
- Delete
- Revert to draft / confirm
- Open related job/phase/estimate in a new tab
- Filter the calendar – hides all bookings except those for the client/job selected



The calendar booking form

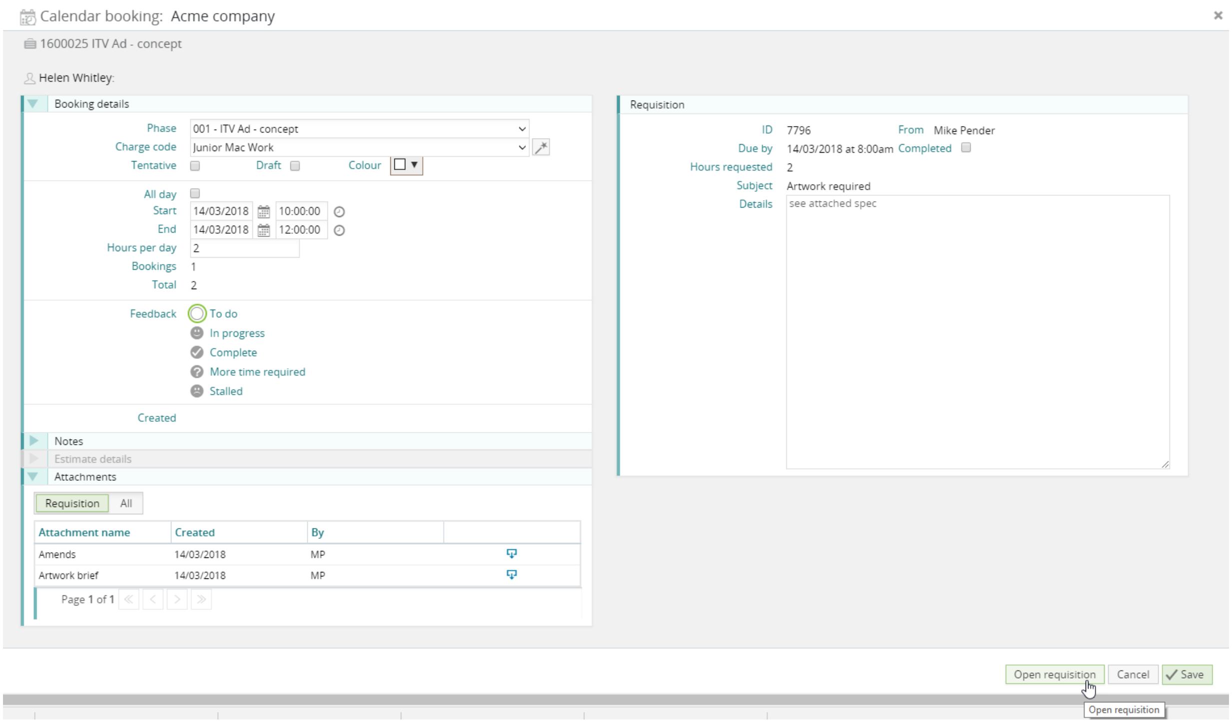
This screen has been re-designed to provide an accordion with the following sections:

- Booking detail
- Notes
- Estimate details
- Attachments

The accordion makes it easier for the user to concentrate on key areas of the booking.

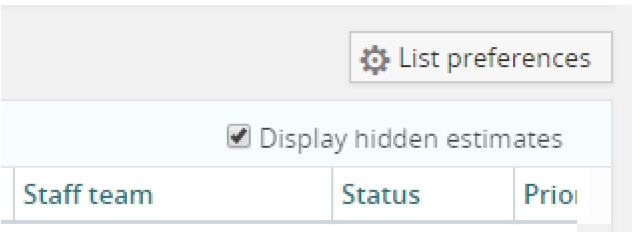
The 'Feedback' section under 'Booking details' is a new feature which enables the staff resource to easily feedback the current status of the booking. For more on this feature see 'MyCalendar'

The 'Attachments' section enables the user to download any related attachments.



Preferences / filters

Previously the user preferences controlling the list of job estimates would simply open every time the 'Get job estimates' button was clicked. Now the list preferences do not open automatically and the user can access the preferences by clicking the new 'List preferences' button. This is located above the list on the far right.



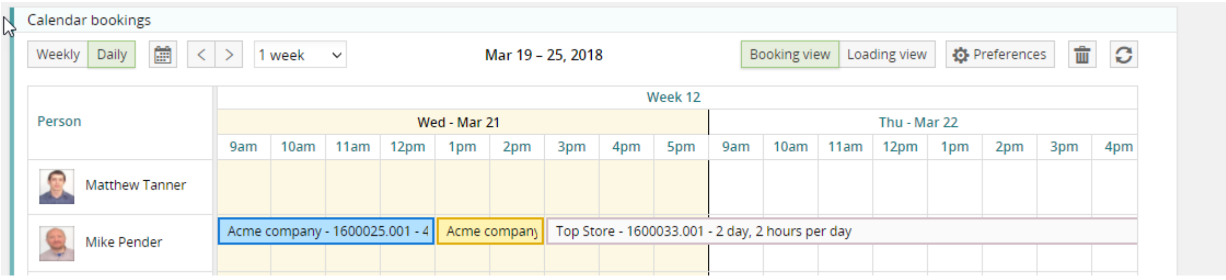
Calendar - MyCalendar

User Interface (UI)

The UI has been improved and additional features added to make the MyCalendar interface an effective communications hub. It is now possible for staff to work from within this interface and assess all the information they require as well as posting timesheets and communicating back to the traffic manager any issues that may arise.

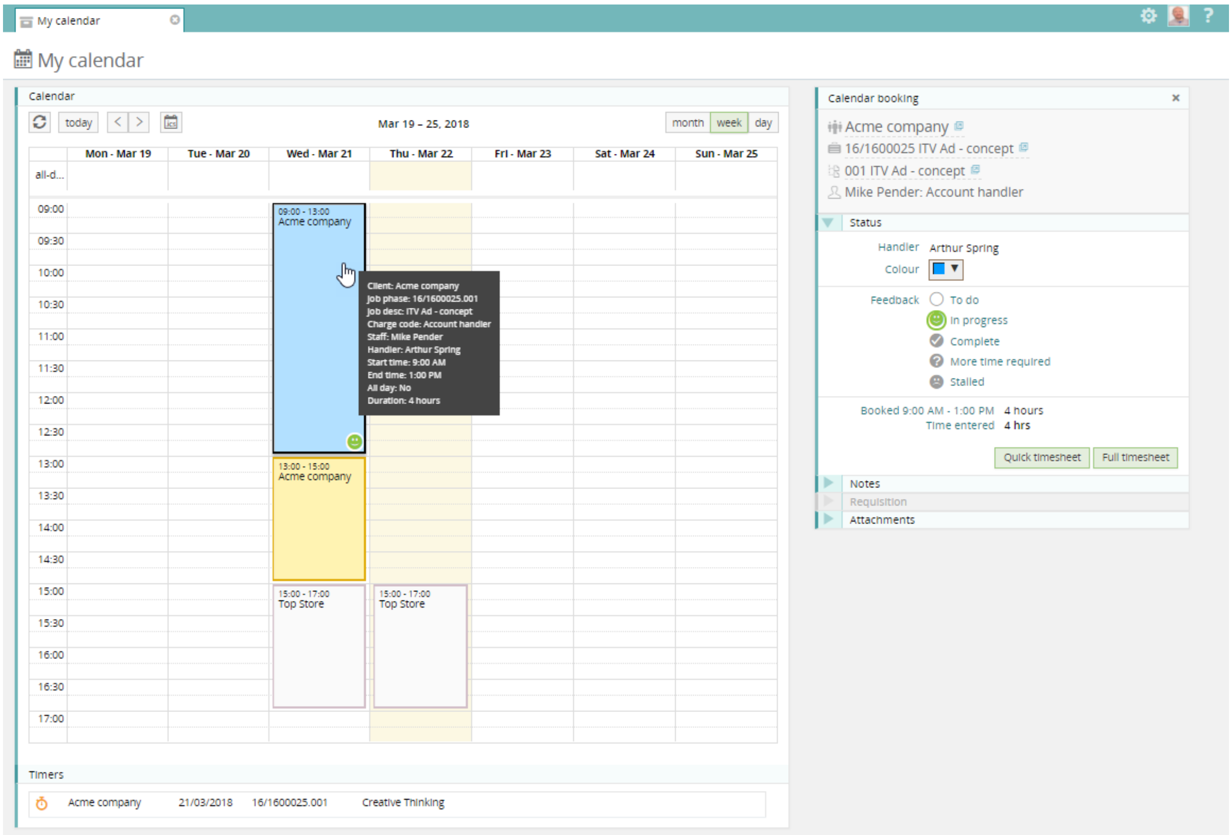
Example – bookings in the main shared calendar

In this example, a staff resource has been allocated some work via 'Calendar bookings'. This includes two bookings for the current day, and one that spans two days.



MyCalendar

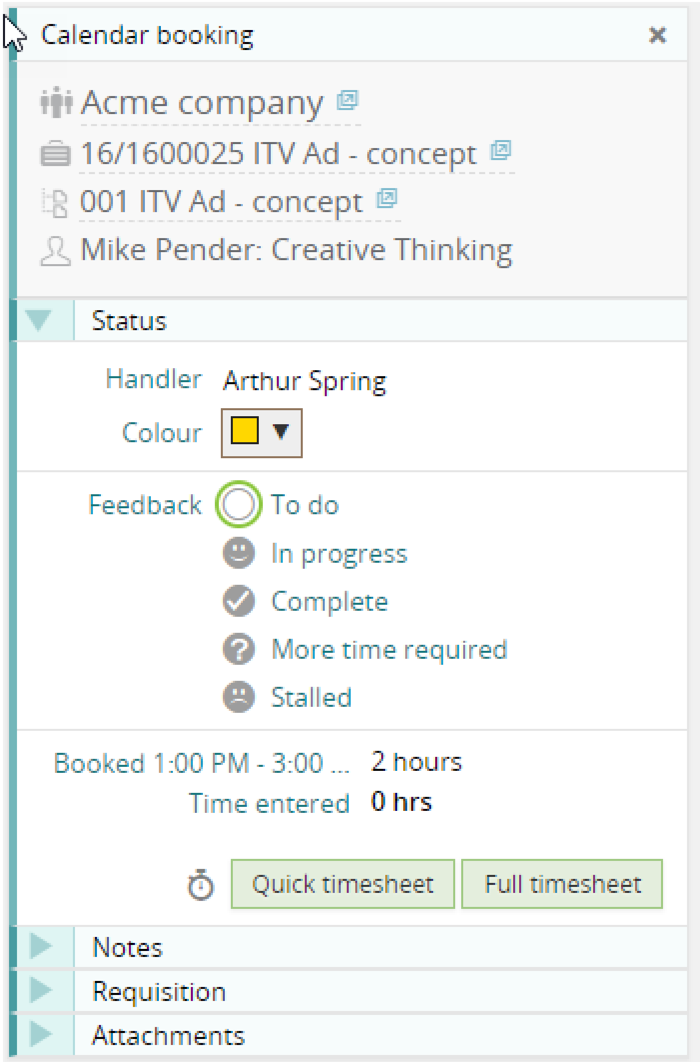
When the staff resource opens up 'MyCalendar' he/she can see these bookings. The user can view a summary of the booking by simply hovering the cursor over it. On clicking a booking, the item is highlighted and a details form showing all the relevant information is opened to the right of the calendar.



MyCalendar details form

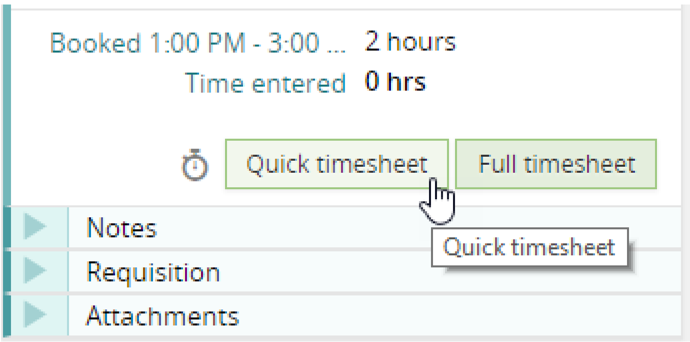
At the top is a header area which displays the client and job information. This area is always open. Under this section are areas that can be opened or closed by the user, depending on what information the user wants so see.

- Status
- Notes
- Requisitions
- Attachments



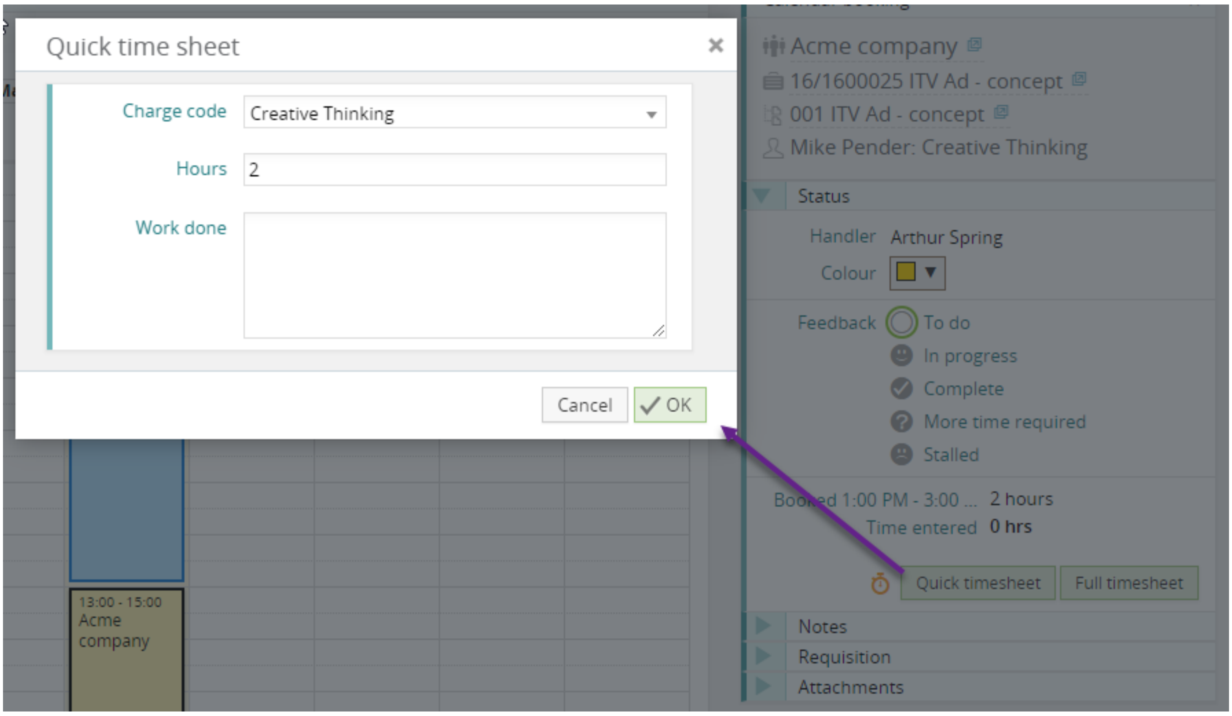
Status section - timesheets

From the status section, a user can easily create a timesheet. 'Quick timesheet' is a new feature than enables the user to create a new timesheet with just a couple of clicks.

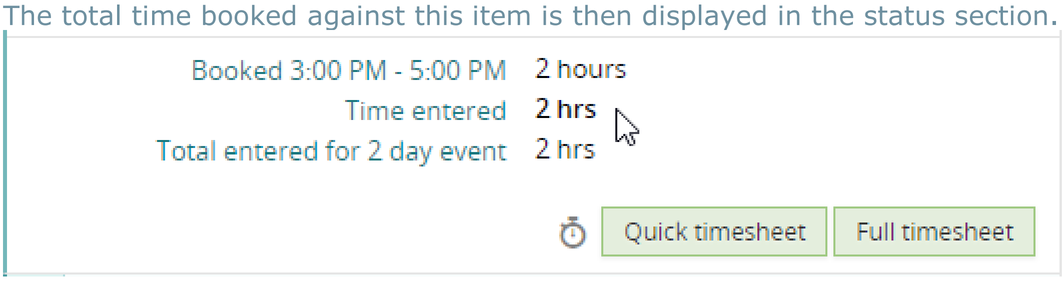


Quick timesheet

Clicking the button opens up a window with the hours allocated already entered as a default, and the charge code pre-selected. The user would typically add a quick description of the work done and click OK.



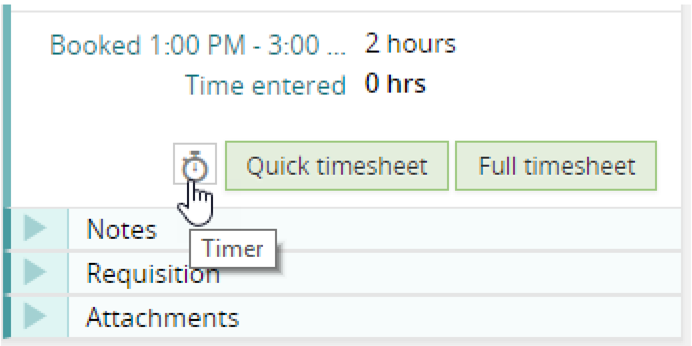
The total time booked against this item is then displayed in the status section.



Note: The new 'Quick timesheet' feature is designed to be simple and have limited functionality. If you need to book overtime or add a material sheet you would instead click the 'Full timesheet' button.

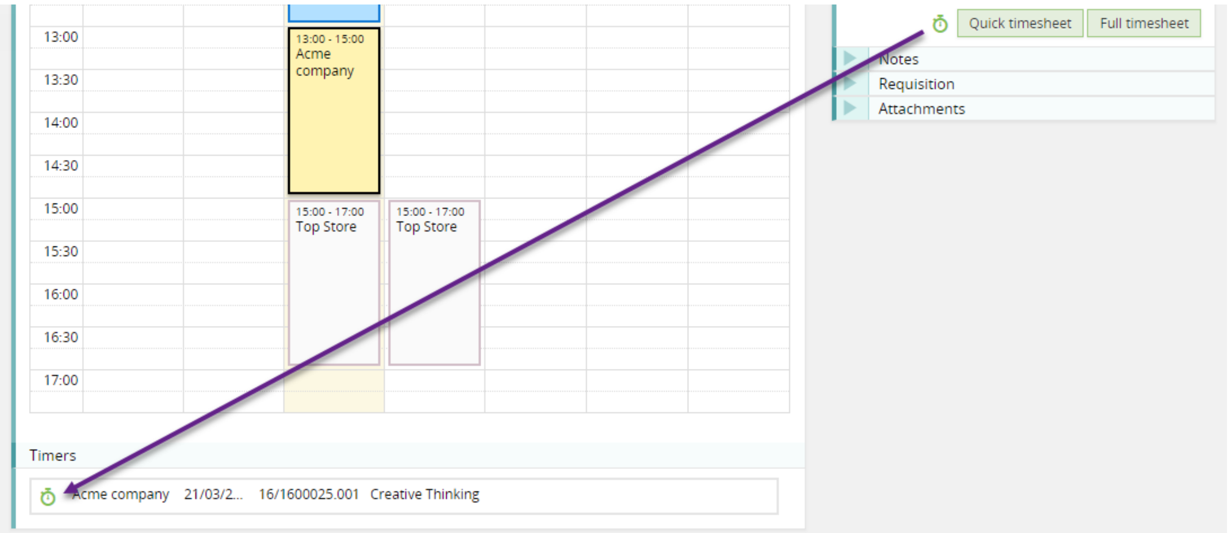
Timer

The Timer is a feature of the timesheet module that can now be accessed via MyCalendar. Instead of tracking the time spent manually, the user can click on the timer icon and start / stop / pause or discard a timer.



List of running timers

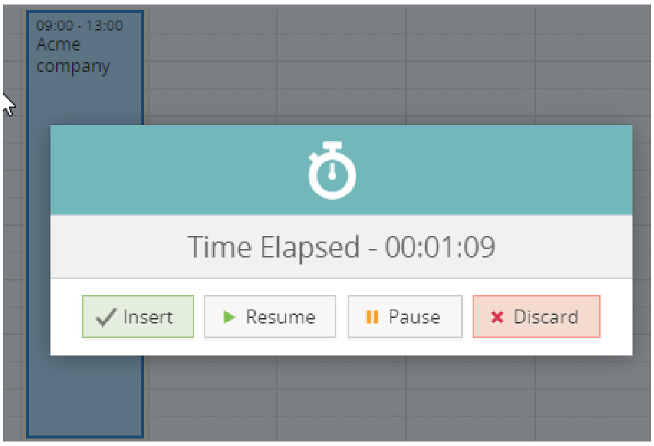
You can have several timers running at the same time. Typically, you would pause one and start another. The running timers are displayed at the bottom of the calendar.



Using the timer

To insert the time, resume, pause, or discard the timer you simply click the icon. You can click the icon in the details area or in the list of active timers.

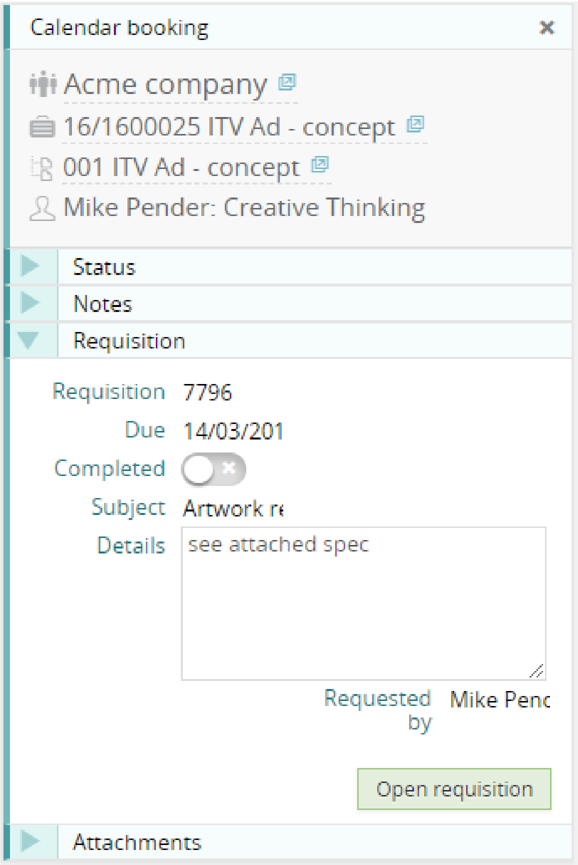
You then get the options shown below. If you choose to insert the elapsed time, this will open up 'Quick time sheet' with the hours already entered.



Requisitions

If you are using requisitions, and this booking was created using a requisition, you can see the requisition details in the 'Requisition' section.

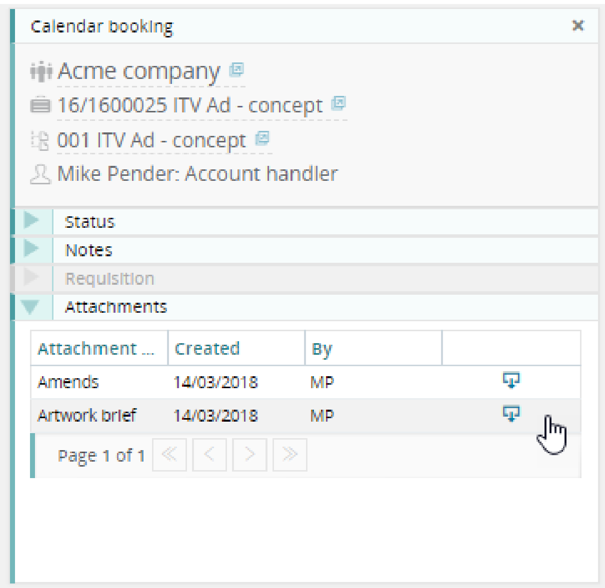
The main requisition details are shown in the 'Details' text area and this can be expanded by the user. If you wish to see the entire requisition record, this can be accessed via the 'Open requisition' button. Once the work for this requisition has been completed, the user can mark the requisition as 'Complete' using the slide switch provided.



Attachments

It is common practice to attach briefs or specification to jobs/phases/requisition records.

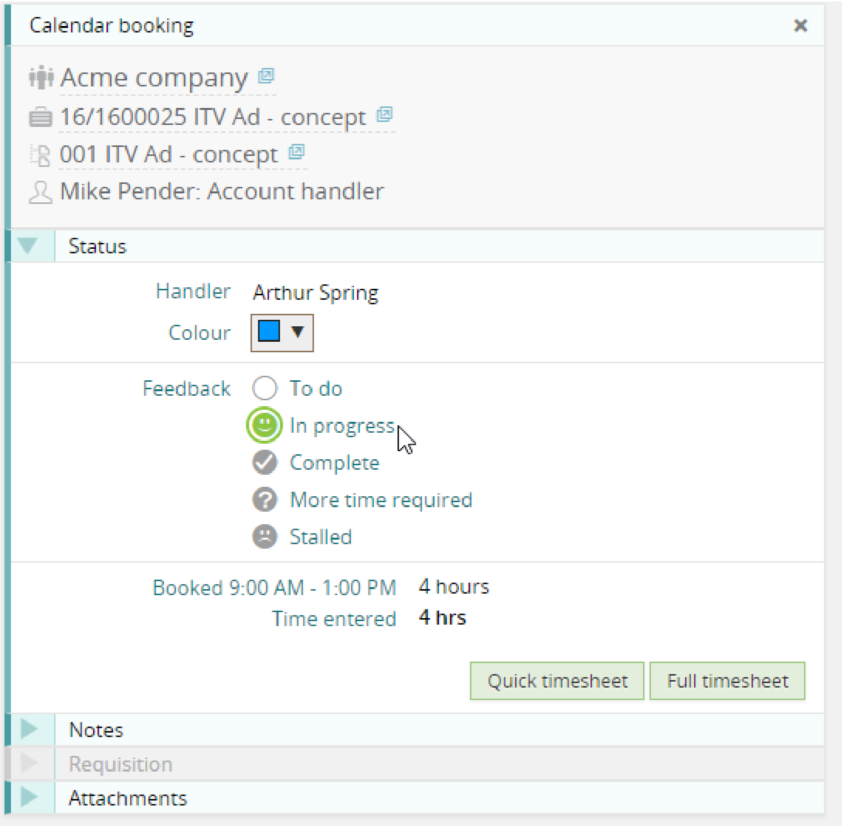
MyCalendar users can now easily download these documents using the 'Attachments' section of the accordion.



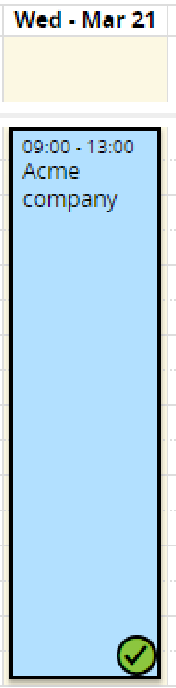
Calendar booking feedback

This new feature makes it easier for staff to feedback to the traffic manager / handler the current status of jobs booked into the calendar.

This feature is accessed via the Status section of the calendar booking details form.



The emoticon then appears in the calendar.



Feedback statuses

There are five statuses to choose. The initial 'Todo' status displays no emoticon. The remaining four statuses are as described below.

In Progress

If a user starts working on an item allocated via the calendar he/she would normally set the item to 'In progress'. A green 'happy face' emoticon will then be displayed on the calendar booking – both in the MyCalendar screen and in the shared Calendar Bookings as seen by the traffic manager.

Complete

 or  (timesheet created)

Once the work is complete, the user selects this feedback option and would then, typically, create a timesheet.

Note: Once a timesheet has been created, the emoticon loses its black background.

More time required

If the work is going OK but the staff member has been unable to complete the work in the time allocated in the calendar he/she should select this status. This will send an alert to the person who created the booking to inform that the budget for this item may need reviewing.

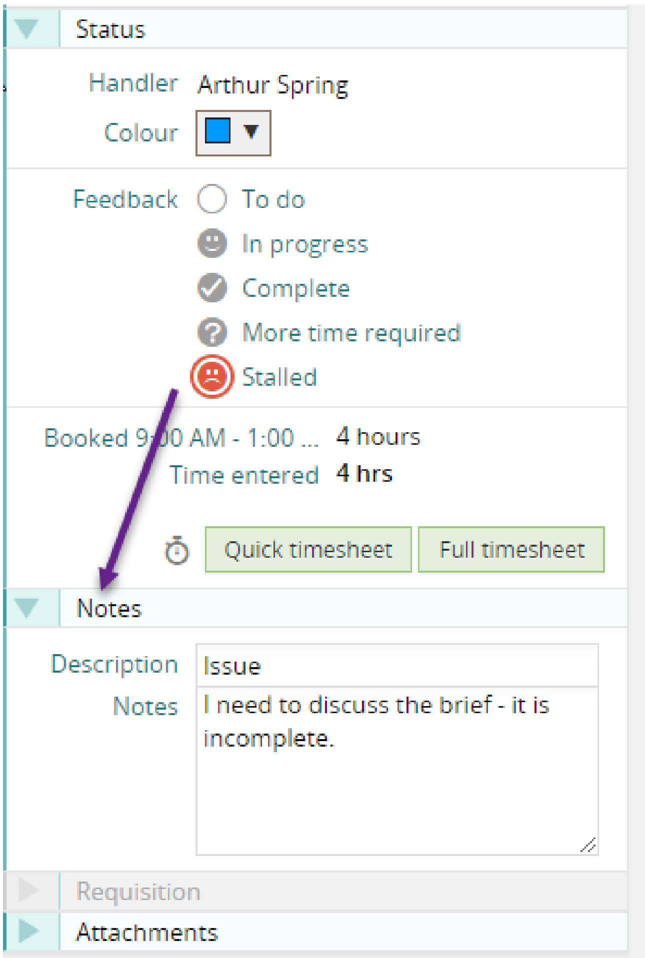
Stalled

If the staff resource has run into a problem and can no longer proceed with this booking, he/she would need to inform the traffic manager of the situation. This feedback status indicates there is a problem and will also automatically send an email alert to the creator of the booking.

Note: It is also now possible for MyCalendar users to change the colour of individual bookings. This can be useful if you need to support other statuses not covered by the five main ones described above. For instance, if client approval is required for a completed booking the staff resource working on this job could set the booking color to yellow, as well as setting the feedback status.

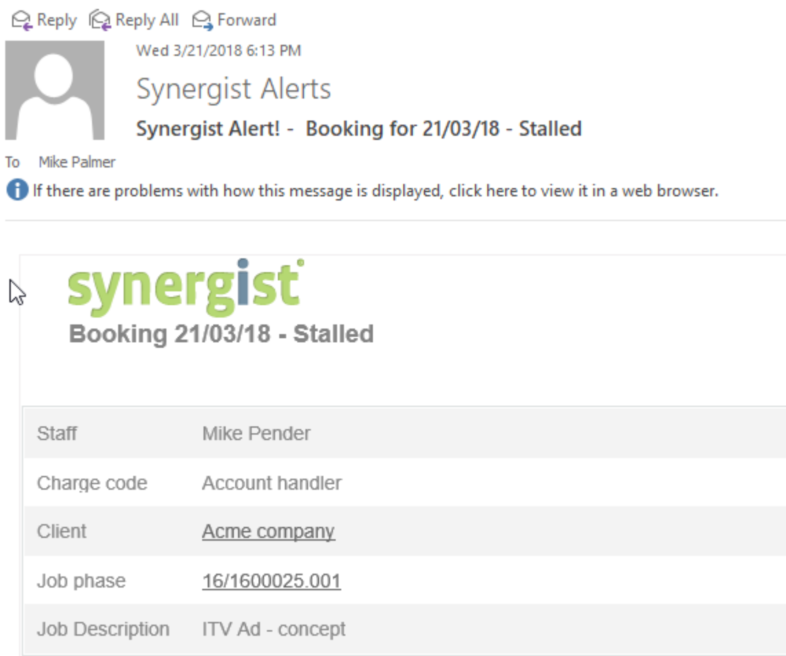
Stalled status

On changing the feedback status to 'stalled', the user should enter a comment in the notes section.



Email alert

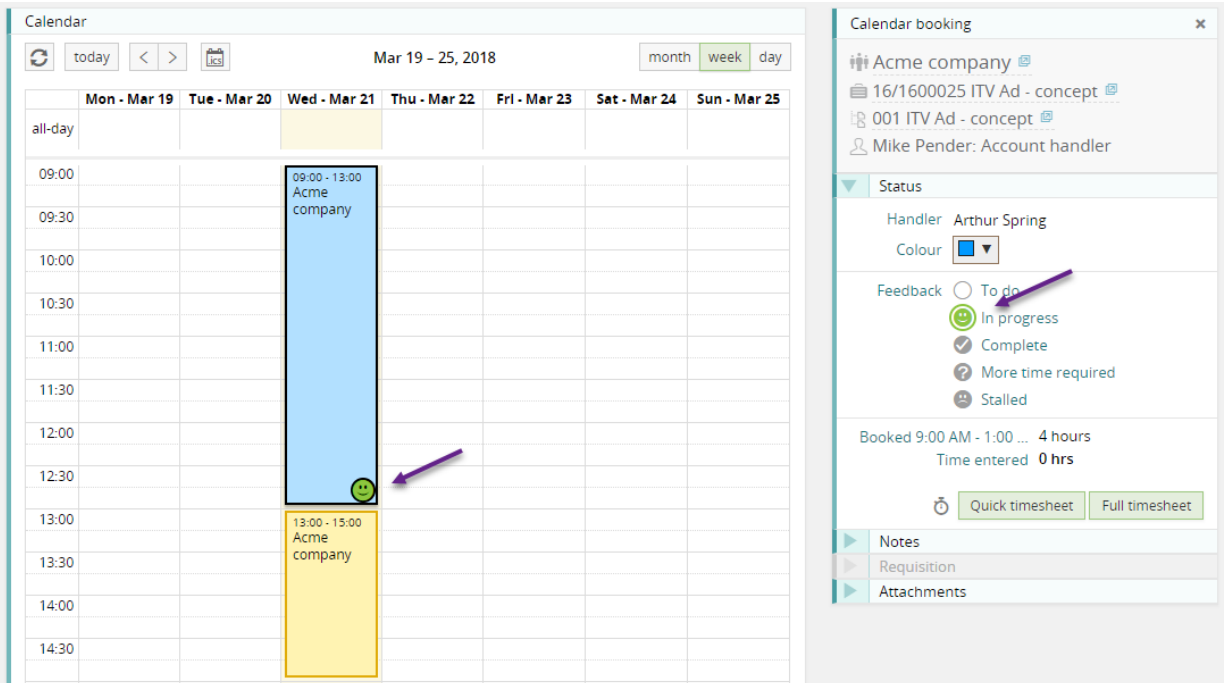
The person who made the calendar booking would then receive an alert to ensure he/she knows the project has stalled.



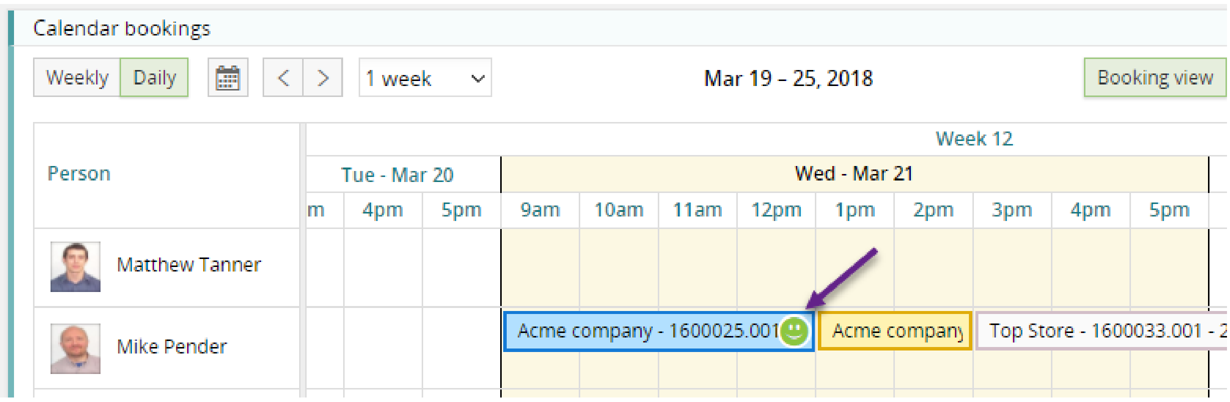
Feedback visibility

The feedback emoticons are visible in both MyCalendar and in the main Calendar Bookings screens.

MyCalendar



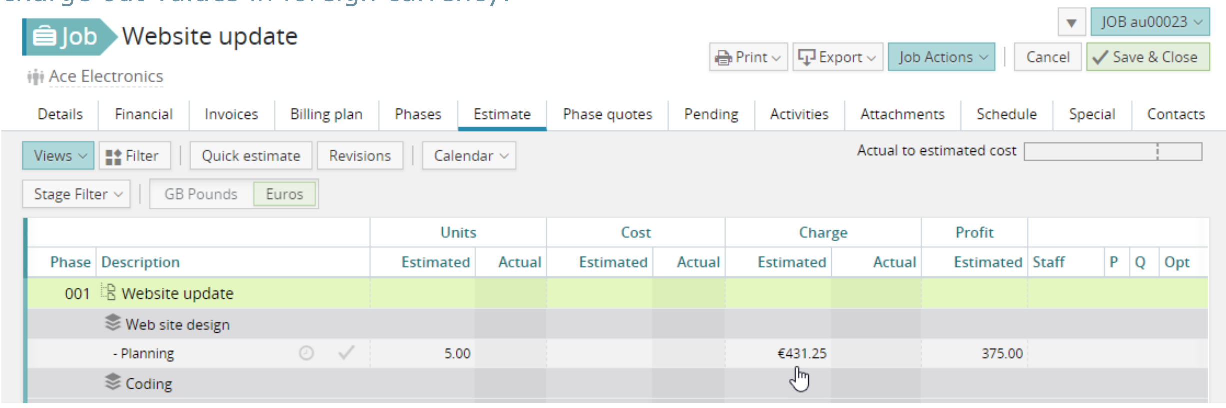
Calendar bookings



Estimating & quoting

Estimate – foreign currency

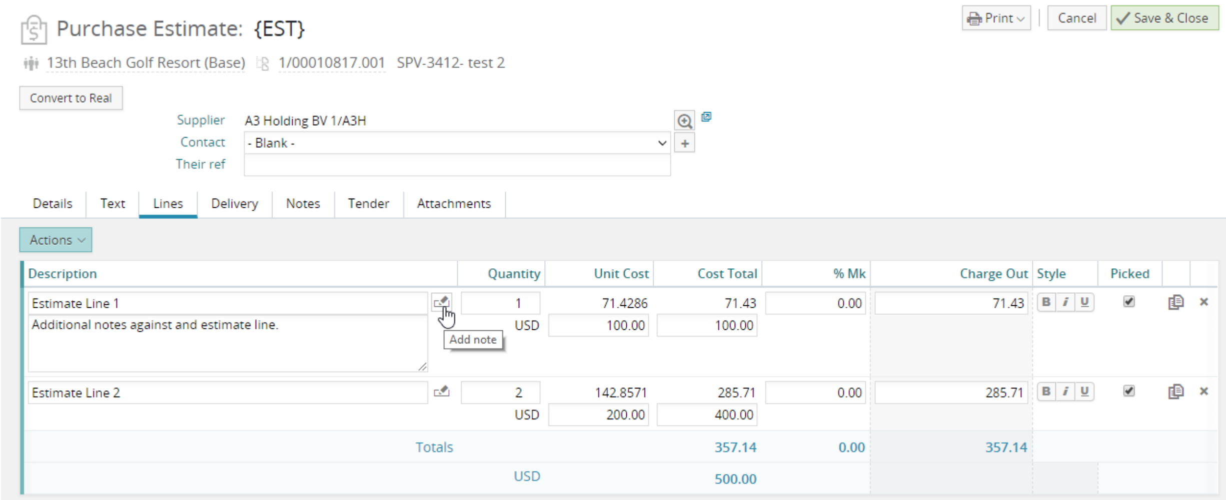
There is now a switch on the estimate screen enabling the user to see the estimated charge out values in foreign currency.



Line detail

Line detail notes added

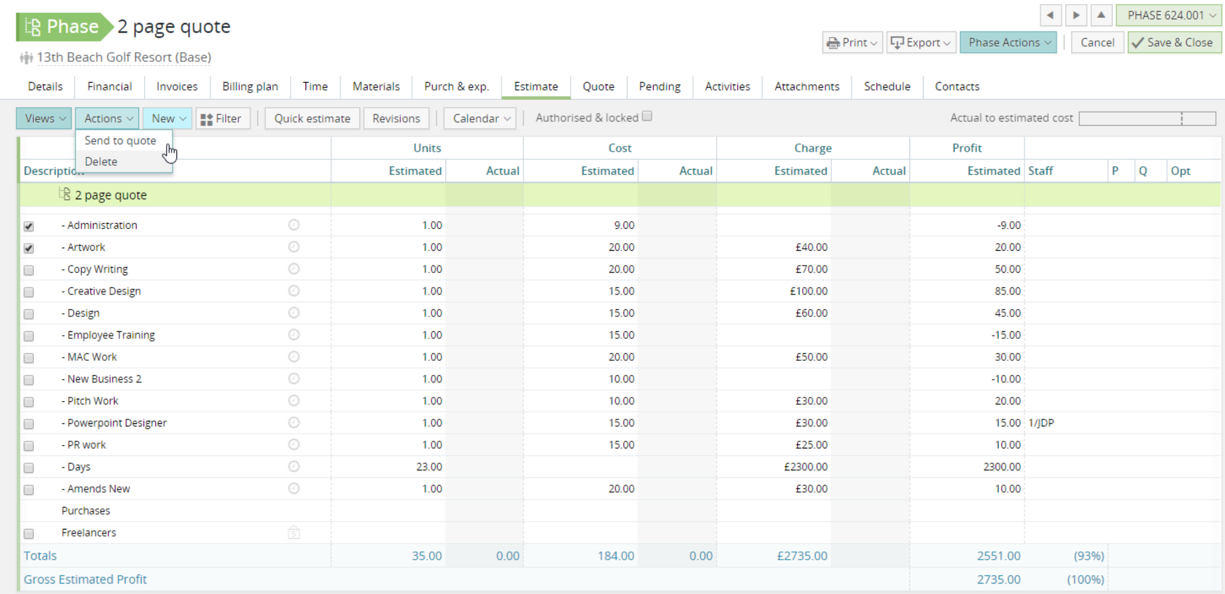
Line detail notes added to the lines screen on an estimate. To access the notes, the user can click on the notes icon to right hand side of line description.



Add estimate to quote

Send estimate line to quote.

From within the estimate page on a phase we can now send lines to the quote. To send a copy of the line or lines to the quote, first select the estimates you require and select send to quote from the actions button.



This will append the line or lines to the bottom of the quote.

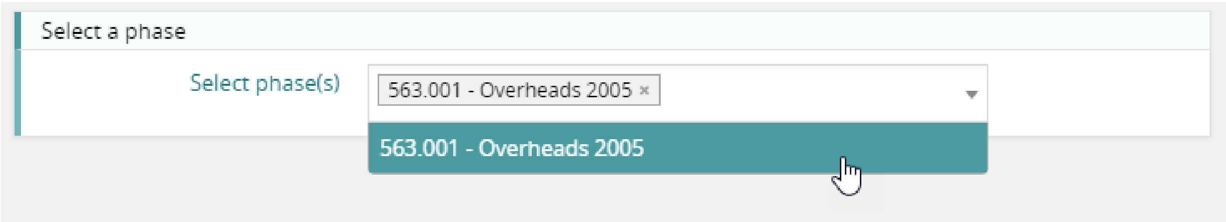
Jobs & phases

Transfer cost utility

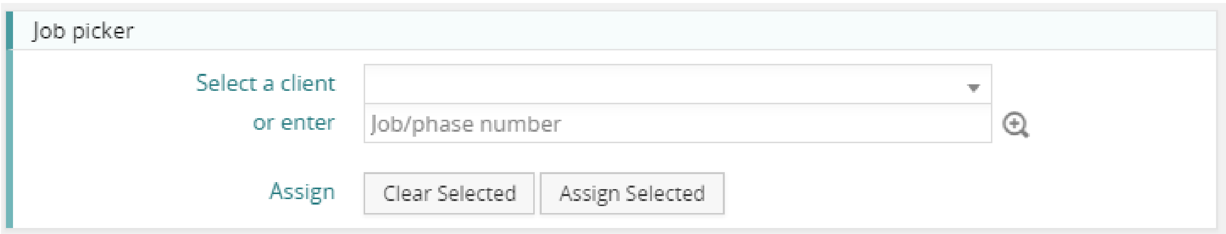
New transfer cost utility

The transfer cost utility has now been added to the job & phase cards and can be accessed via the job actions button.

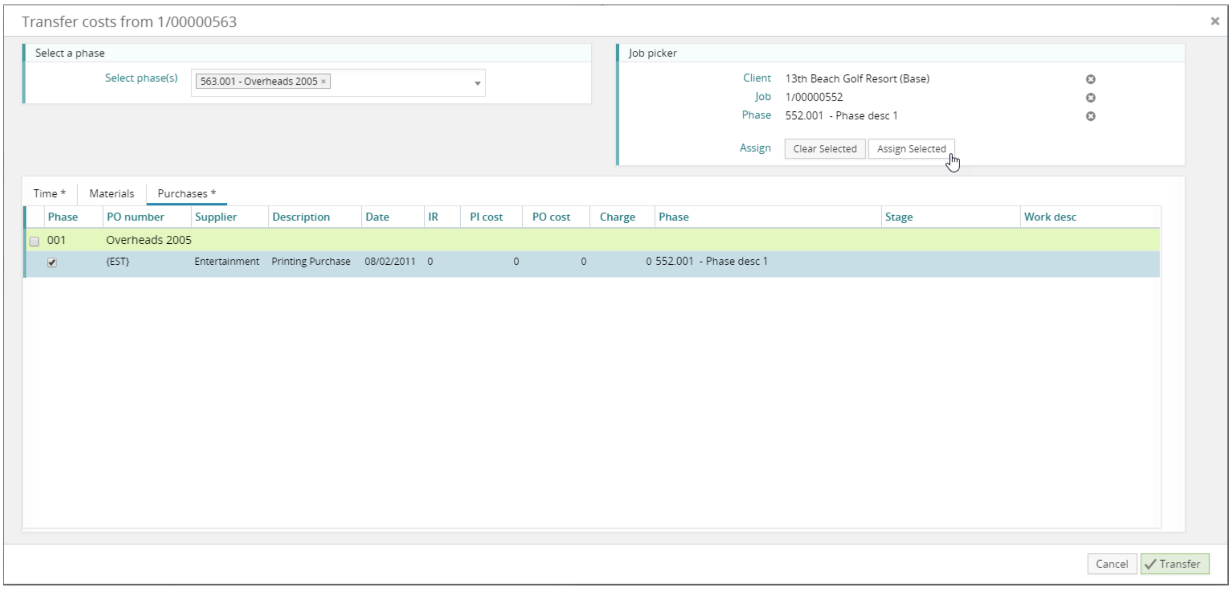
From within the utility you can select the phases you wish to select costs from,



.. and select where the costs are transferred to



The user is able to transfers costs to different jobs, phases or stages during the same transfer. To assign the target phase or stage to a cost, select the cost type tab, either Time, Materials or Purchases, then select the checkbox to the left of the cost, search for the target phase or stage in the job picker and click the 'Assign selected' button.



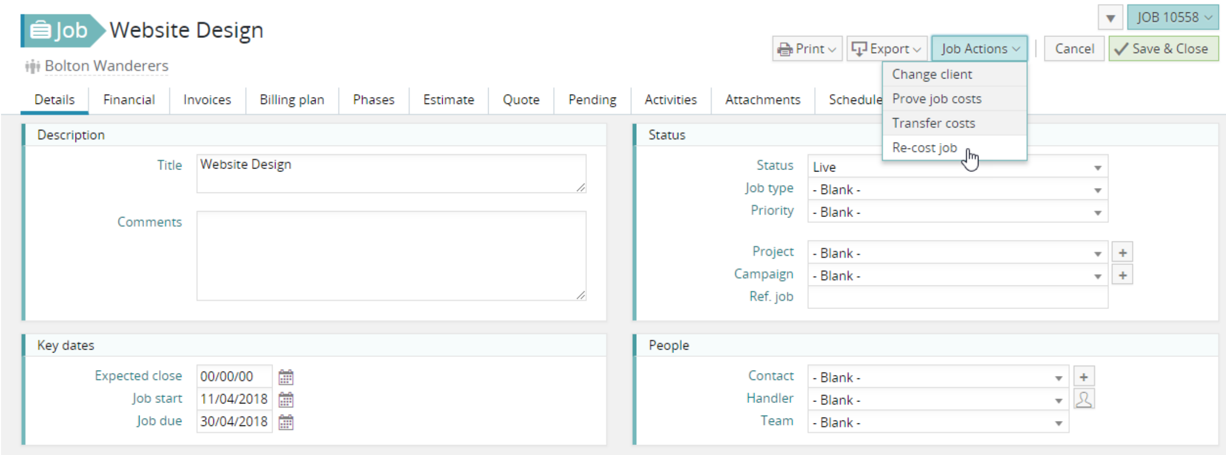
To choose a different phase or stage to assign the cost to, simply click on the 'x' next to the client, job or phase.

Once all the costs you wish to transfer have been assigned to a target phase or stage, simply click on the transfer button.

Re-cost job utility

Re-cost job utility from job card

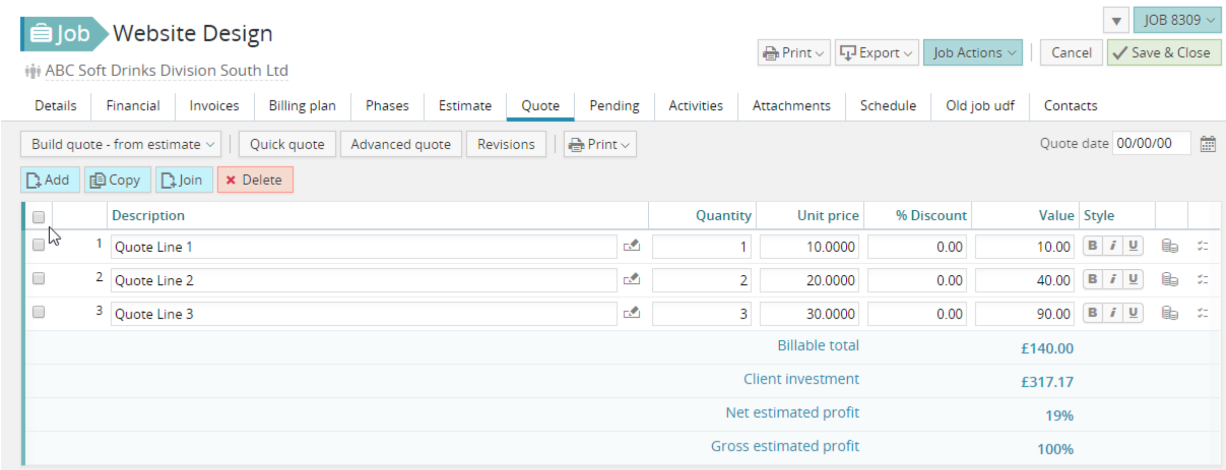
We have now added the re-cost job utility to the Job Actions button on the job card; previously this was only available from within the batch update area on the job and phase lists.



Quote multi select checkbox

New select all multi select checkbox

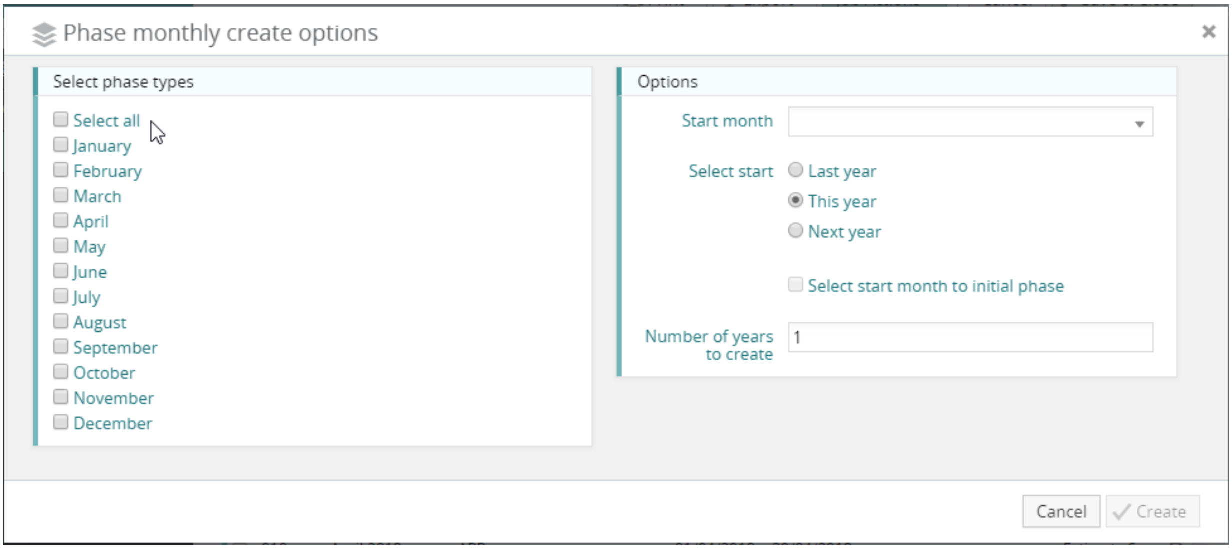
In order to speed up the deletion of quote lines a checkbox has been added to the header row on the job quote screen.



Phase monthly create options

New 'select all' function in create options

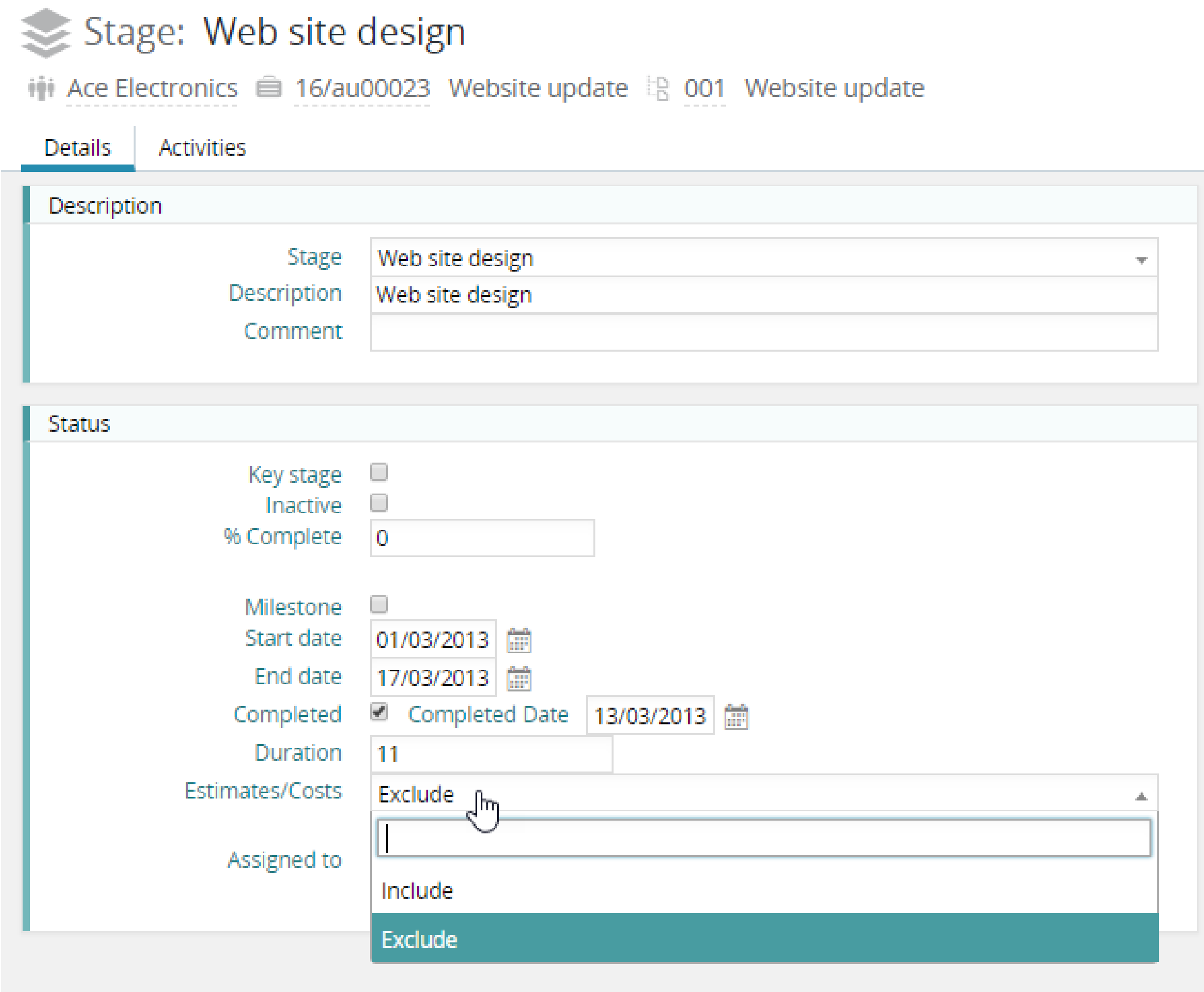
In order to speed up the selection of all months a new select all checkbox has been added.



Special stages

Two tier jobs

If you are creating a set of stages for each of your phases (two tier structure job) you can now designate certain stages to excluded estimates, timesheets & purchases.



Job phase list columns

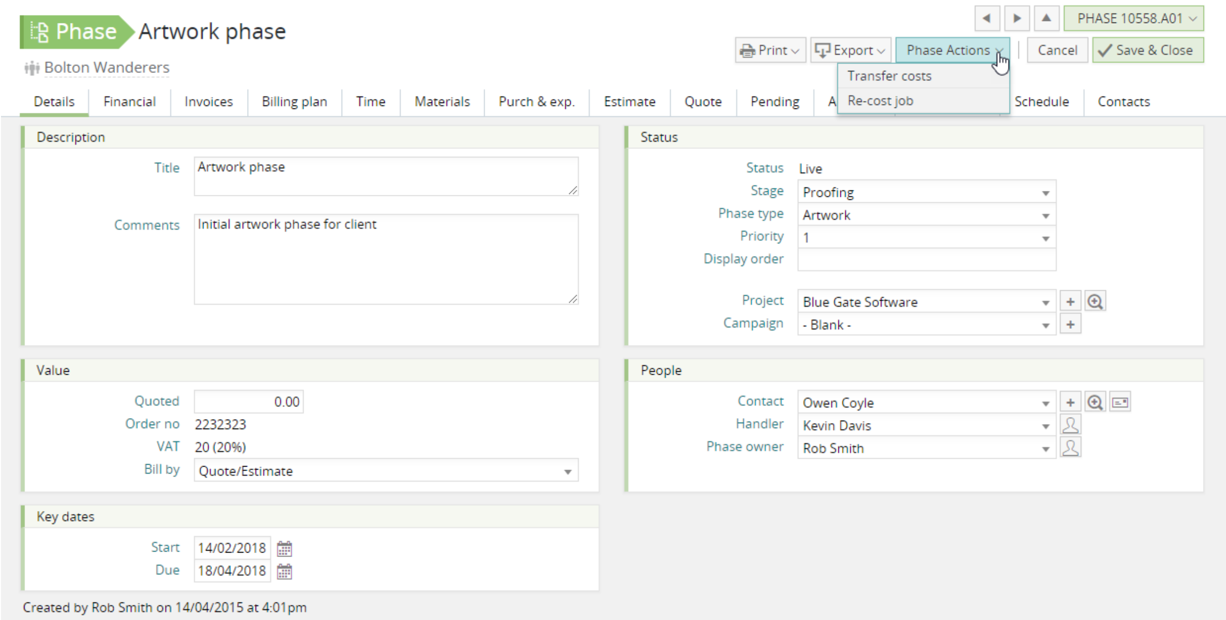
Owner column information

Rather than displaying the owner code in the owner column, we now display the owner's initials.

Job phase actions

New phase actions button

The user will now have the ability to access phase actions from a new button at the top right of the phase card.



Transfer costs

The transfer cost action is now available from the phase card and works in same way as the transfer cost action on the job card but with restriction of only being able to select costs from the current phase.

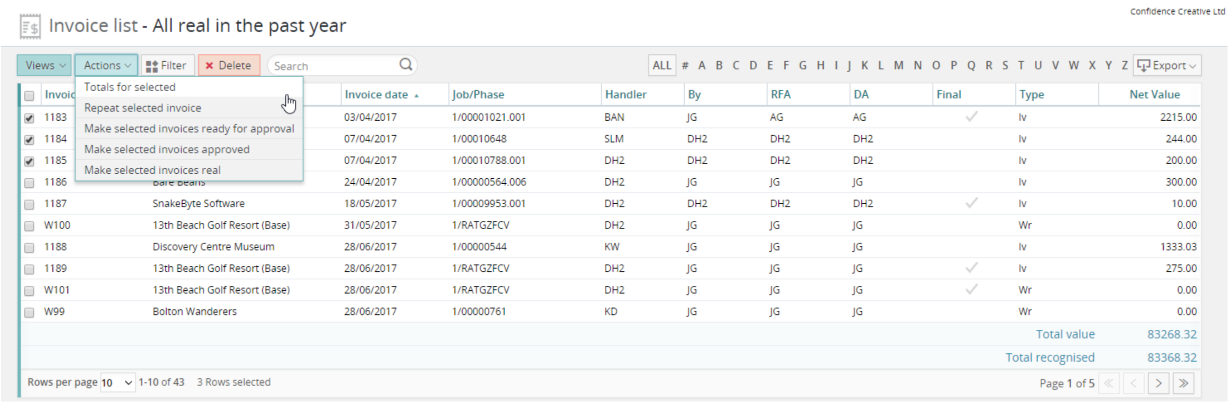
Re-cost job

The re-cost job action is now available from the phase card and works in same way as the re-cost job action on the job card.

Batch actions

New batch actions added to invoice lists

New batch actions have been added to the invoice and draft invoice lists. To use the batch functionality, select the invoice you wish to carry out the action on by using the checkboxes to the left of the invoice number and select the action you require from the action button.

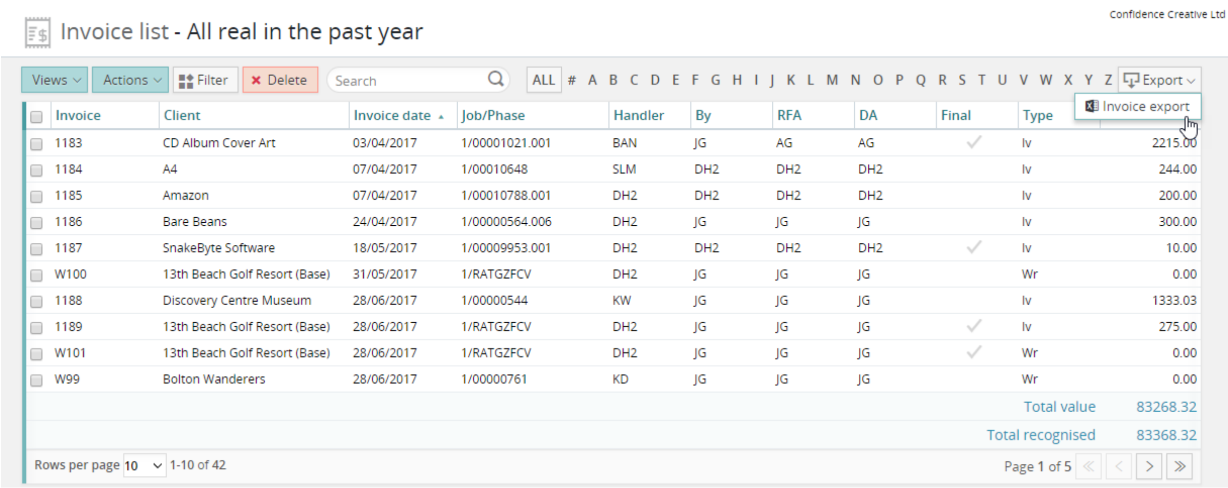


Invoic		Invoice date	Job/Phase	Handler	By	RFA	DA	Final	Type	Net Value
1183		03/04/2017	1/00001021.001	BAN	JG	AG	AG	✓	Iv	2215.00
1184		07/04/2017	1/00010648	SLM	DH2	DH2	DH2		Iv	244.00
1185		07/04/2017	1/00010788.001	DH2	DH2	DH2	DH2		Iv	200.00
1186		24/04/2017	1/00000564.006	DH2	JG	JG	JG		Iv	300.00
1187	SnakeByte Software	18/05/2017	1/00009953.001	DH2	DH2	DH2	DH2	✓	Iv	10.00
W100	13th Beach Golf Resort (Base)	31/05/2017	1/RATGZFCV	DH2	JG	JG	JG		Wr	0.00
1188	Discovery Centre Museum	28/06/2017	1/00000544	KW	JG	JG	JG		Iv	1333.03
1189	13th Beach Golf Resort (Base)	28/06/2017	1/RATGZFCV	DH2	JG	JG	JG	✓	Iv	275.00
W101	13th Beach Golf Resort (Base)	28/06/2017	1/RATGZFCV	DH2	JG	JG	JG	✓	Wr	0.00
W99	Bolton Wanderers	28/06/2017	1/00000761	KD	JG	JG	JG		Wr	0.00
									Total value	83268.32
									Total recognised	83368.32

Exports

Invoice and draft invoice export

Similar to the client export, users can now export invoices to a csv file. The new export also contains the approval columns.



Invoice	Client	Invoice date	Job/Phase	Handler	By	RFA	DA	Final	Type	
1183	CD Album Cover Art	03/04/2017	1/00001021.001	BAN	JG	AG	AG	✓	Iv	2215.00
1184	A4	07/04/2017	1/00010648	SLM	DH2	DH2	DH2		Iv	244.00
1185	Amazon	07/04/2017	1/00010788.001	DH2	DH2	DH2	DH2		Iv	200.00
1186	Bare Beans	24/04/2017	1/00000564.006	DH2	JG	JG	JG		Iv	300.00
1187	SnakeByte Software	18/05/2017	1/00009953.001	DH2	DH2	DH2	DH2	✓	Iv	10.00
W100	13th Beach Golf Resort (Base)	31/05/2017	1/RATGZFCV	DH2	JG	JG	JG		Wr	0.00
1188	Discovery Centre Museum	28/06/2017	1/00000544	KW	JG	JG	JG		Iv	1333.03
1189	13th Beach Golf Resort (Base)	28/06/2017	1/RATGZFCV	DH2	JG	JG	JG	✓	Iv	275.00
W101	13th Beach Golf Resort (Base)	28/06/2017	1/RATGZFCV	DH2	JG	JG	JG	✓	Wr	0.00
W99	Bolton Wanderers	28/06/2017	1/00000761	KD	JG	JG	JG		Wr	0.00
									Total value	83268.32
									Total recognised	83368.32

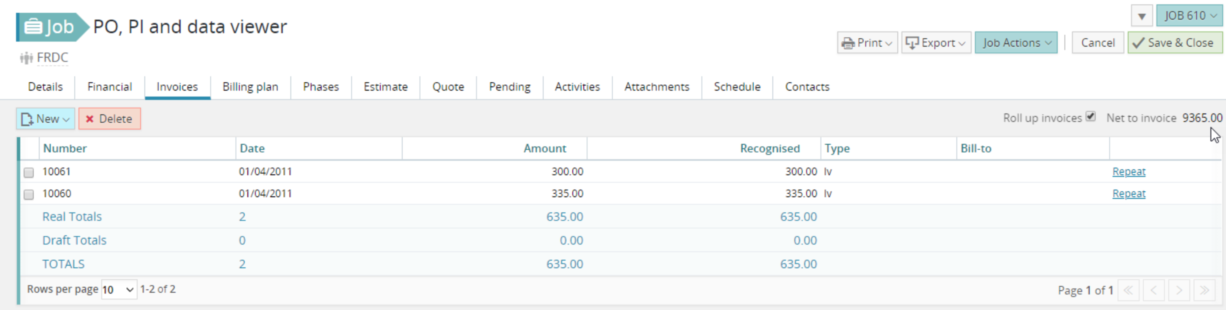
Simply select the invoices using the checkboxes on the left hand side of the invoice number and select the export.

You can also access the export from the draft invoices list.

Net to invoice

Net to invoice value added to invoices

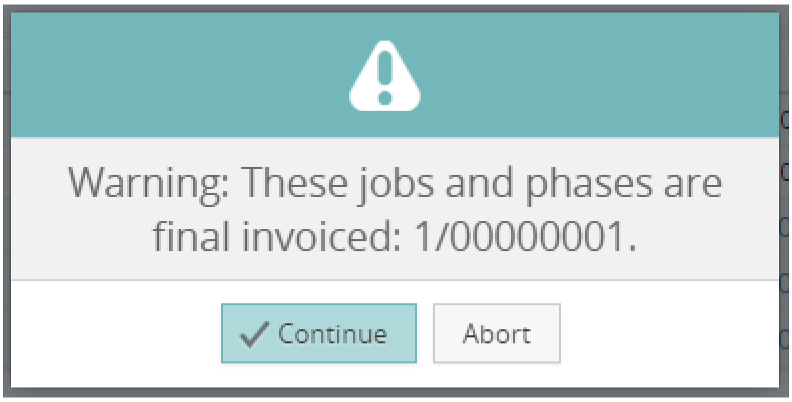
The net to invoice value has been added to the job and phase cards and appears in the top right corner of the invoice tab.



Warning

Invoice creation

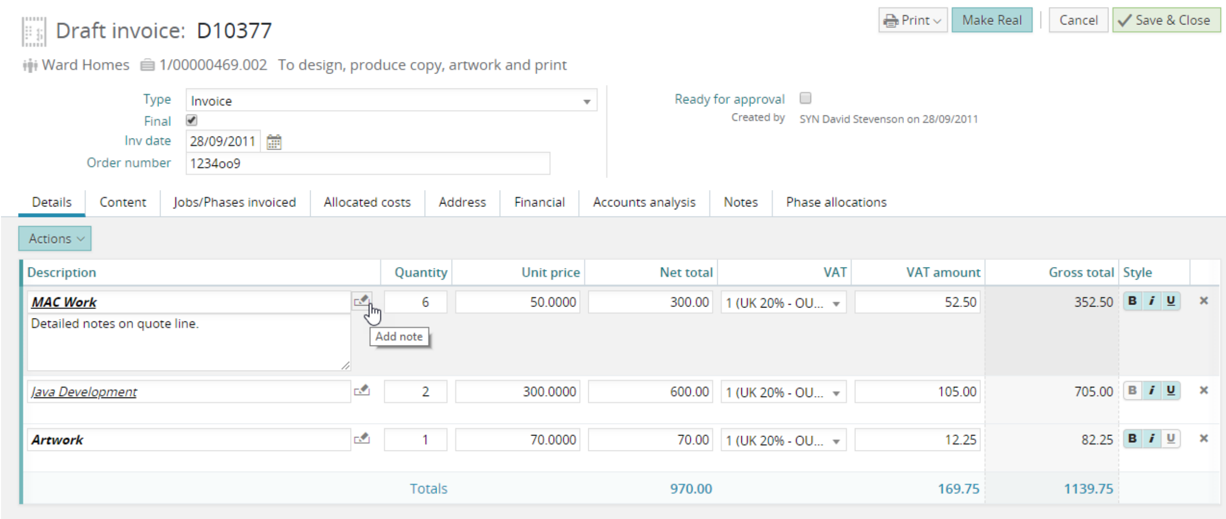
During invoice creation, if the job or phase has been final invoiced then a warning is shown to the user.



Line detail

Line detail notes added

Line detail notes have been added to the invoice details screen on an invoice. To access the notes, the user can click on the notes icon to right hand side of line description.



Data viewer tool

Opportunities

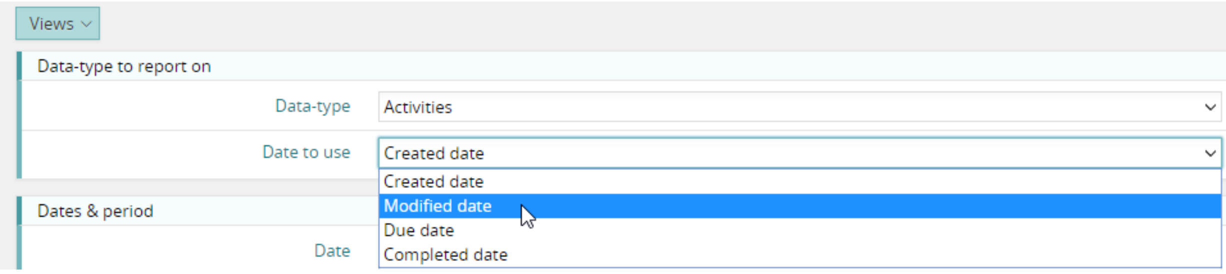
The data type 'Opportunities' now has two new options for 'value'.

- Estimated time
- Actual time

This will allow a user to see the number of hours rather than monetary values.

Activities

'Date to use' feature added to this data type.



Facility to make numbers negative for a data entity

Addition of a check box when defining a data entity to specify that you want the values to be returned as negative.

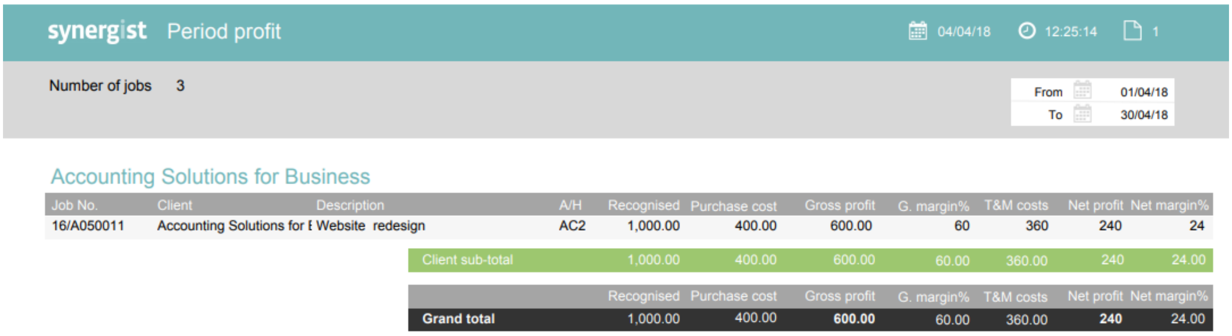
When reported with a data entity of a different type, the negative option give possibilities to allow effective subtraction in either column totals or in the consolidation of entities. Consolidation can already be done either by excluding the "data type" column (simple check box) or by giving more than one entity the same name.

Previously all data entities would be added together, which sometimes isn't desirable.

Period profit report

Improved format

This report now displays both gross & net profit in the same report. However, there is still a gross profit only version available.



synergist Period profit 04/04/18 12:25:14 1

Number of jobs 3

From 01/04/18
To 30/04/18

Accounting Solutions for Business

Job No.	Client	Description	A/H	Recognised	Purchase cost	Gross profit	G. margin%	T&M costs	Net profit	Net margin%
16/A050011	Accounting Solutions for E	Website redesign	AC2	1,000.00	400.00	600.00	60	360	240	24
Client sub-total				1,000.00	400.00	600.00	60.00	360.00	240	24.00

	Recognised	Purchase cost	Gross profit	G. margin%	T&M costs	Net profit	Net margin%
Grand total	1,000.00	400.00	**600.00**	60.00	360.00	**240**	24.00

Cost & quotes report

Export version

Variance added to the export version of the report

Est Time Charge	Actual Time Charge	Est Time Variance	Est Time %
1050	780.12	270	26
594	0	594	100

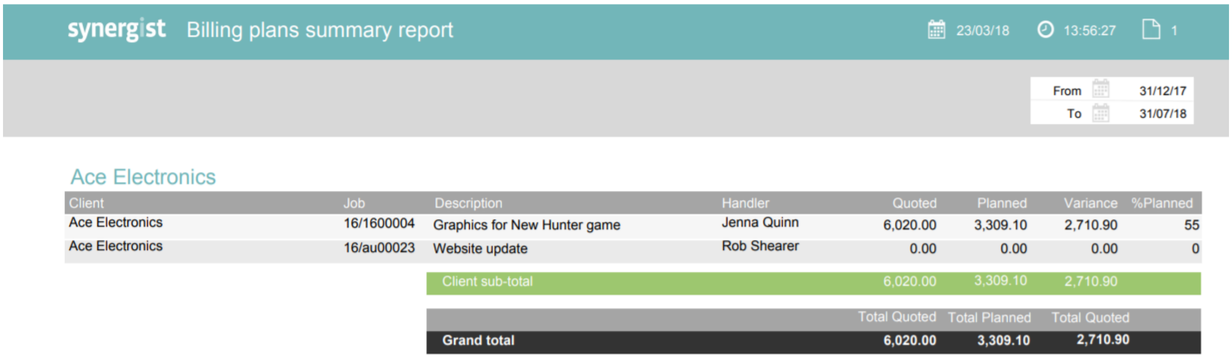
WIP detail export added to the job/phase cards

WIP Detail

Reports Work In Progress for the specific job / phase.

Billing plans summary report

New standard report. This report looks at a selection of jobs or phases and for each displays the quoted value and the billing plan. This report can be run as an exception report, where only quoted jobs that have no plan or an incomplete plan are displayed.

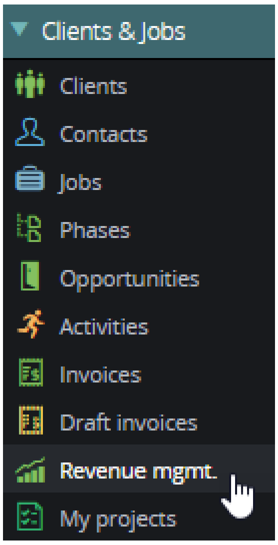


Revenue Management

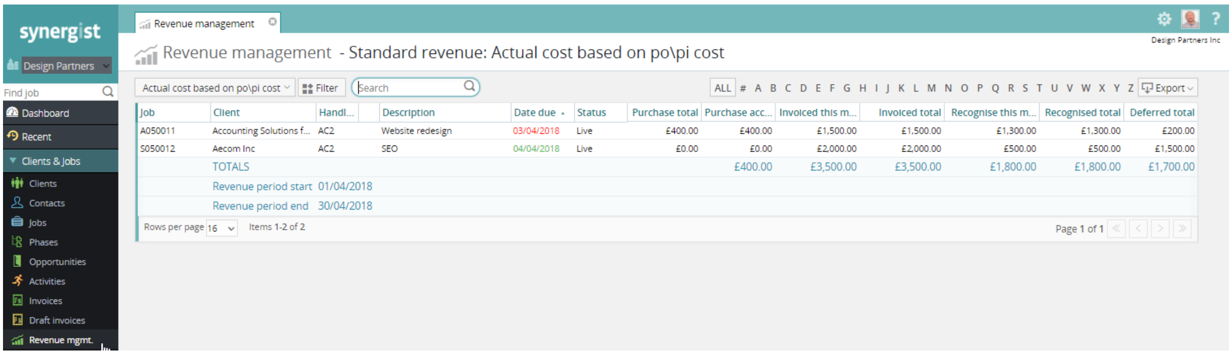
Revenue management screen

If you have opted to use Synergist's revenue recognition features there is now a revenue management screen available to help you manage this process.

Note: Revenue recognition can be a complex process. You should discuss your requirements with your project manager before using this feature.

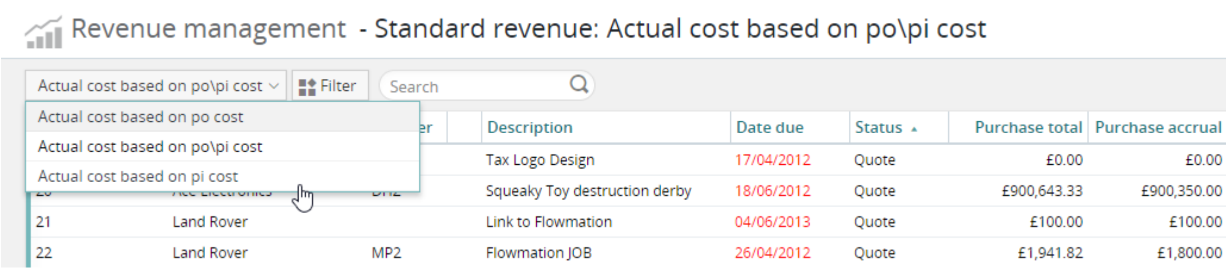


The list of jobs displayed in revenue management are all jobs which are not final invoiced up to the end of the current revenue period, plus all jobs which have been final invoiced in the current revenue period. Clicking one of the items in the list will open up the job in question in a separate tab.



Costs

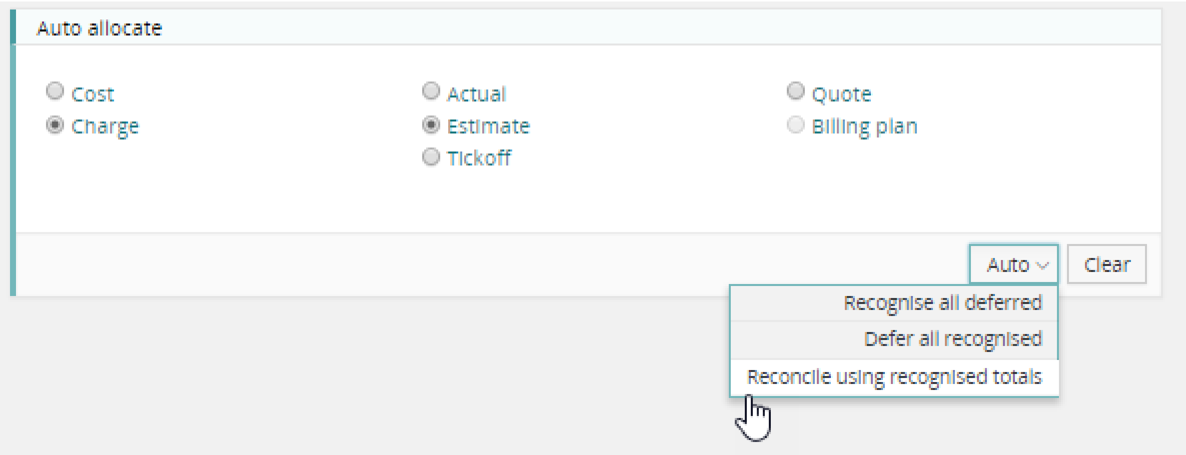
The user has the ability to base the actual cost on either purchase orders, purchase invoices or a hybrid of both by selecting the view from the button in the top left hand corner.



Recognizing and deferring revenue

Invoice phase allocations tab

When allocating revenue to an invoice, and if you have selected to use Synergist's revenue recognition features, the 'auto' button provides a variety of options for recognizing and deferring income. These features were previously only available in the desktop version of the software.



Billing plans

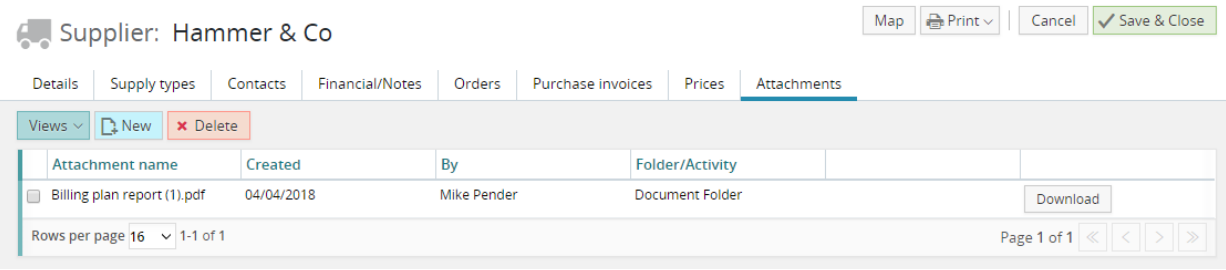
See the 'Billing plans' section of these release notes to see new revenue recognition features.

Attachments

Support for suppliers, purchase orders & purchase invoices

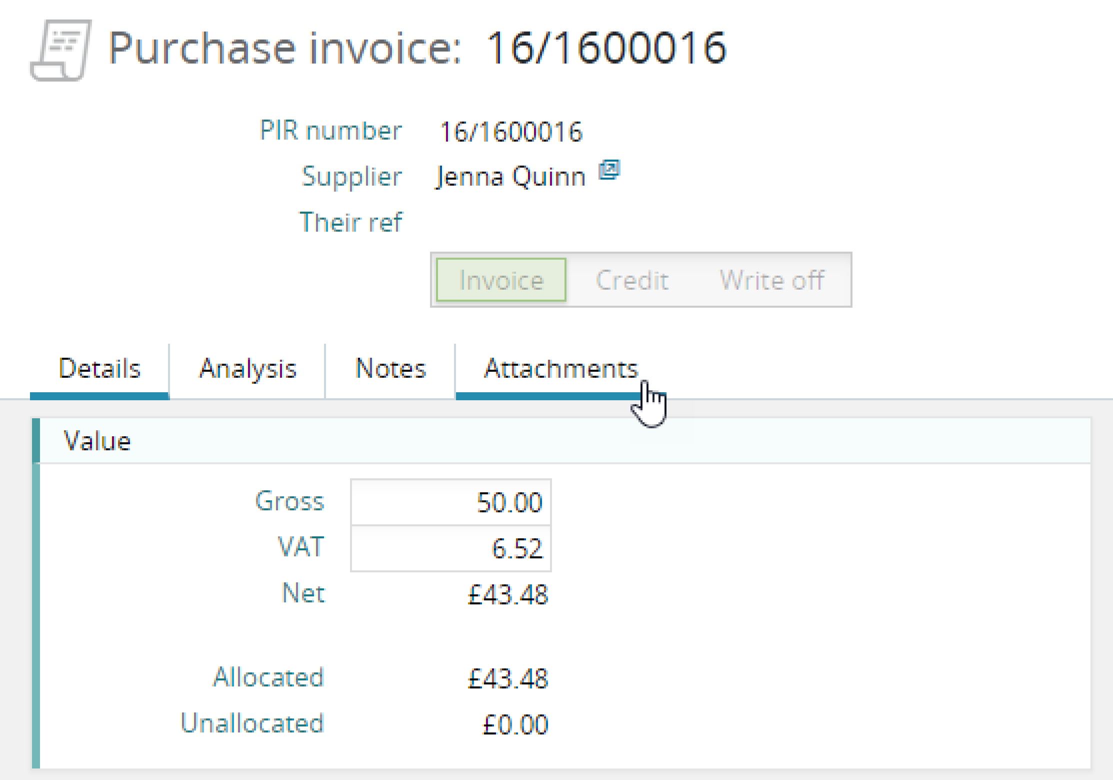
Previously it was only possible to attach documents to Client/client contacts/jobs/phases/activities. We have now extended that functionality to the purchasing side of Synergist.

Supplier attachments tab

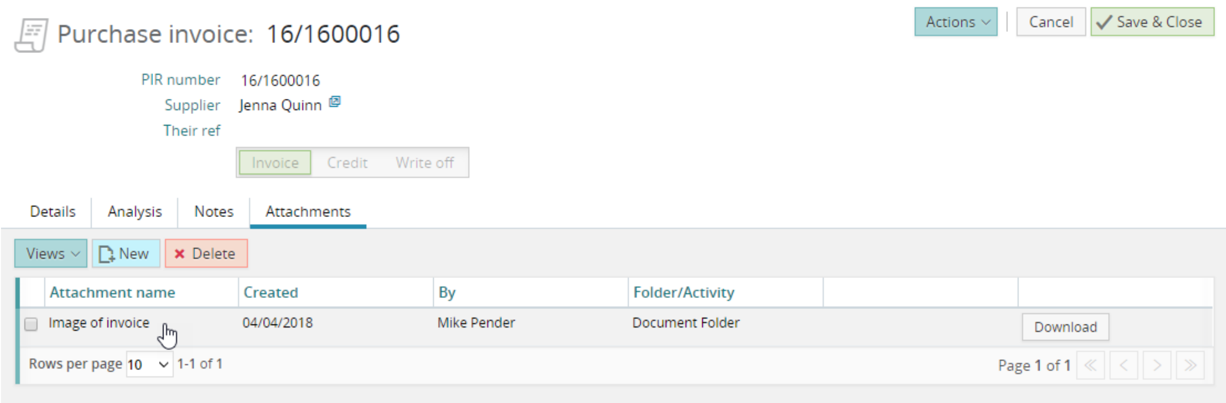


Purchase invoice attachments tab

Similarly, you can add an attachment to a purchase invoice. For instance, you may wish to scan all your purchase invoices and attach these to the purchase invoice record. You can do the same for purchase orders.

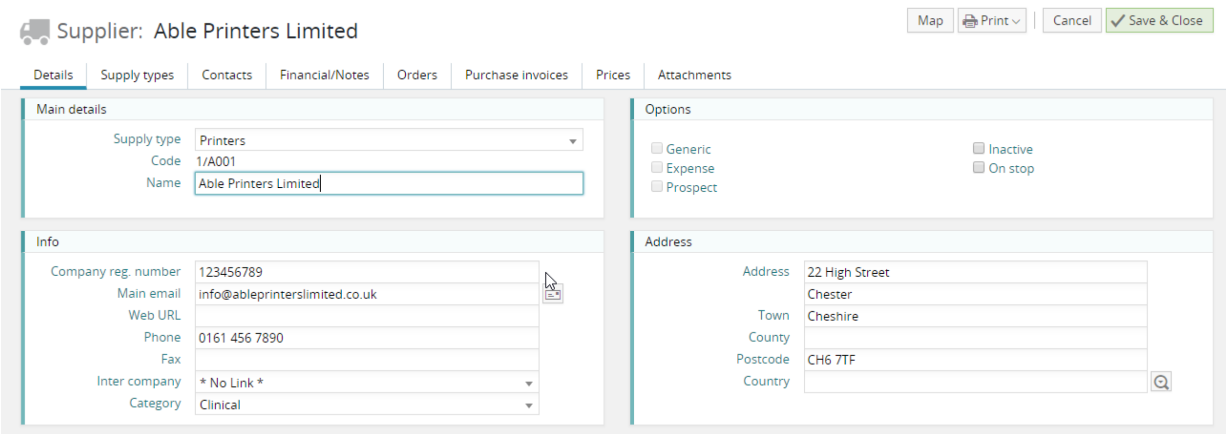


Scan of the purchase invoice attached



New supplier company registration field

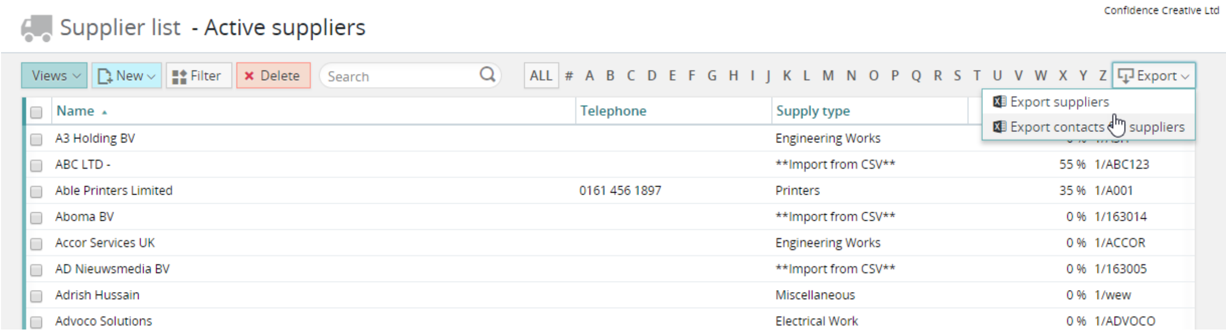
A new field for the supplier company registration number has been added to the supplier record.



Exports

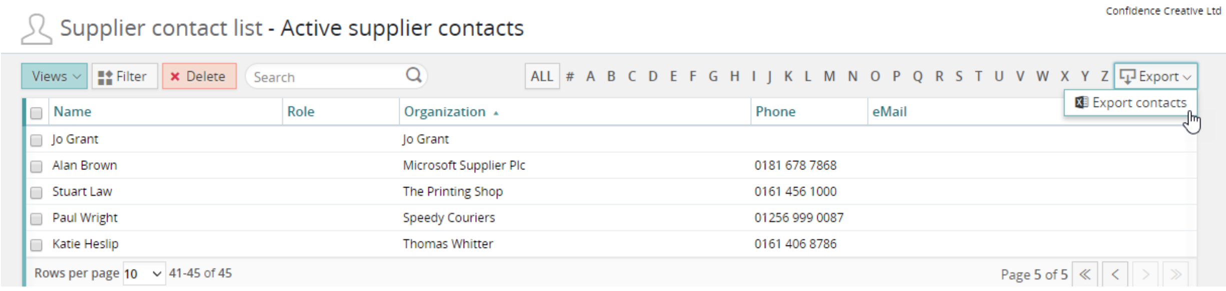
Supplier and supplier contacts export

Similar to the client and client contacts export, users can now export supplier records to a csv file.



Simply select the suppliers using the checkboxes on the left hand side of the supplier name and select the export you require.

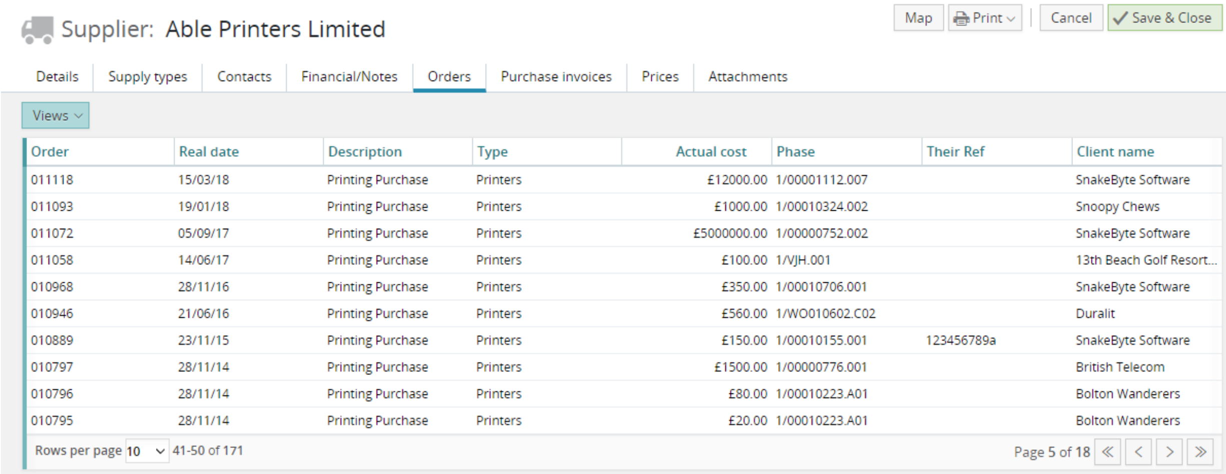
You can also access the supplier contacts export from the supplier contacts list.



Supplier order tab

New supplier order tab

From the supplier area, you are now able to access the supplier orders.

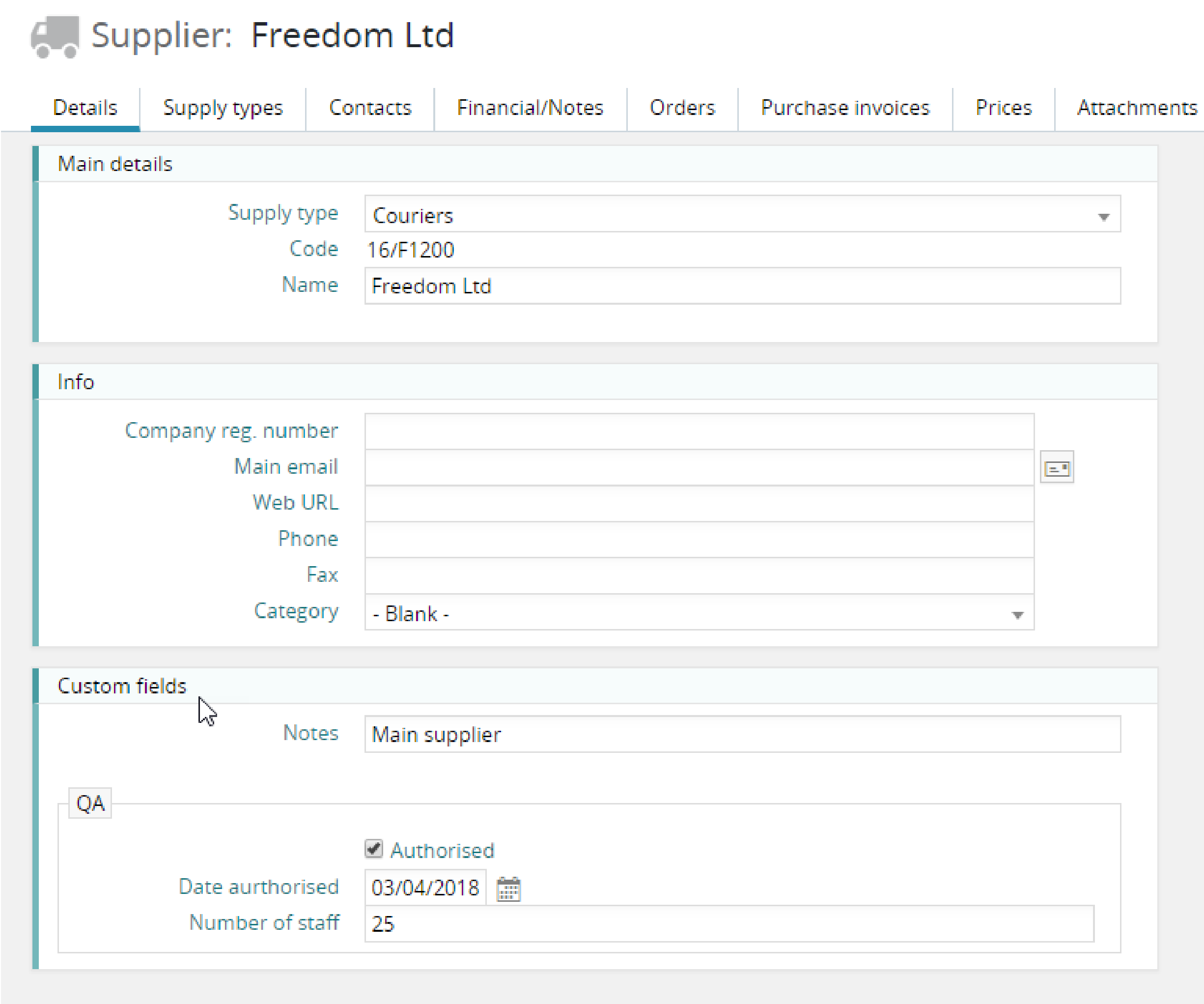


Order	Real date	Description	Type	Actual cost	Phase	Their Ref	Client name
011118	15/03/18	Printing Purchase	Printers	£12000.00	1/00001112.007		SnakeByte Software
011093	19/01/18	Printing Purchase	Printers	£1000.00	1/00010324.002		Snoopy Chews
011072	05/09/17	Printing Purchase	Printers	£5000000.00	1/00000752.002		SnakeByte Software
011058	14/06/17	Printing Purchase	Printers	£100.00	1/VJH.001		13th Beach Golf Resort...
010968	28/11/16	Printing Purchase	Printers	£350.00	1/00010706.001		SnakeByte Software
010946	21/06/16	Printing Purchase	Printers	£560.00	1/WO010602.C02		Duralit
010889	23/11/15	Printing Purchase	Printers	£150.00	1/00010155.001	123456789a	SnakeByte Software
010797	28/11/14	Printing Purchase	Printers	£1500.00	1/00000776.001		British Telecom
010796	28/11/14	Printing Purchase	Printers	£80.00	1/00010223.A01		Bolton Wanderers
010795	28/11/14	Printing Purchase	Printers	£20.00	1/00010223.A01		Bolton Wanderers

Rows per page 10 41-50 of 171 Page 5 of 18

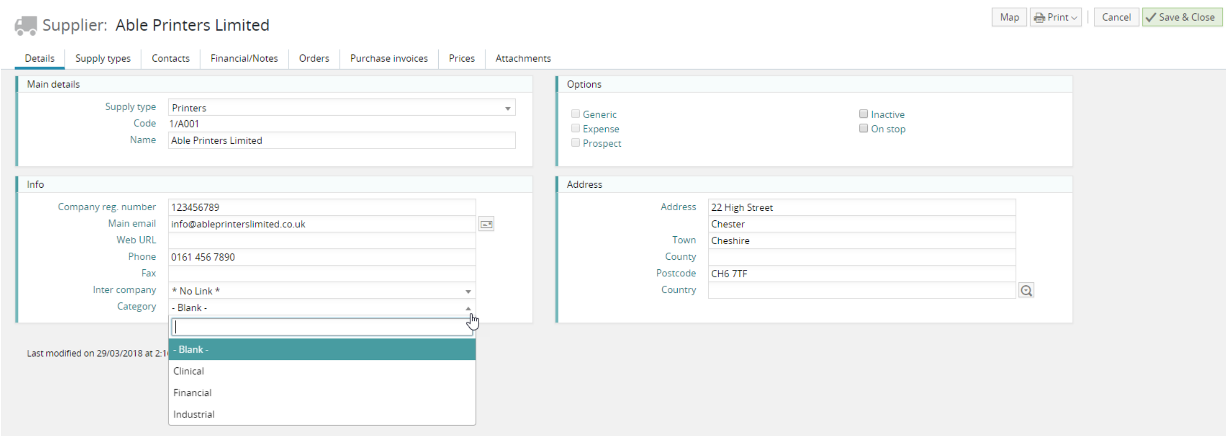
Custom fields

Custom fields added to supplier record



Supplier category field change

On the supplier card, the supplier category field is now a look-up field.

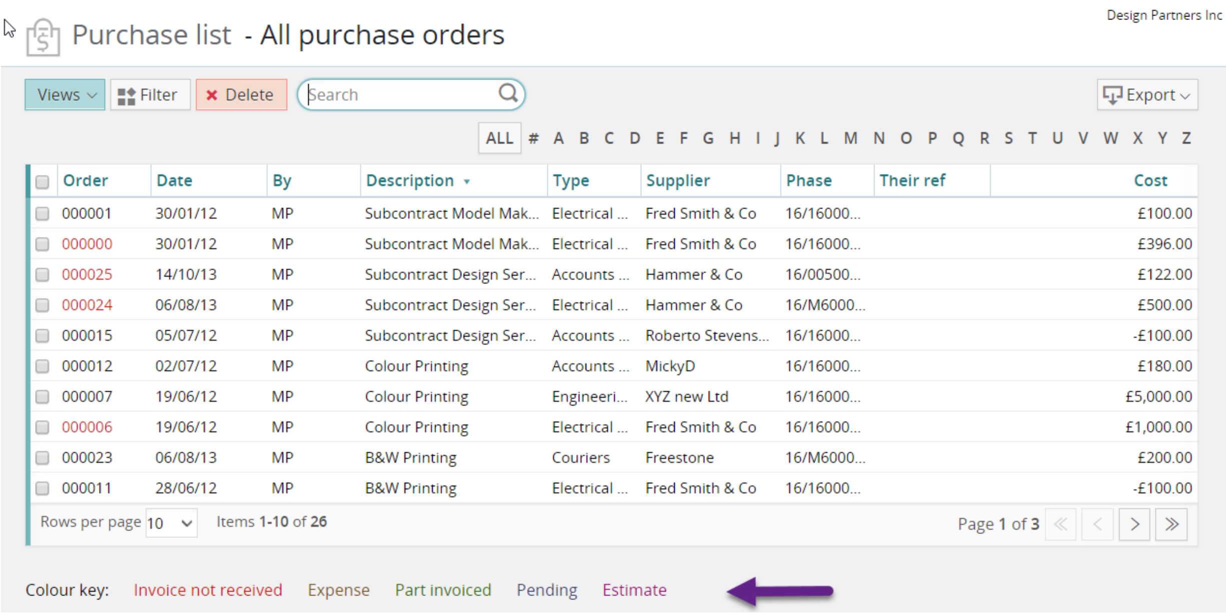


The available categories displayed for the new field come from the options setup in the lookup and custom fields section of file maintenance. The supplier category field may also be filtered on in the criteria screen.

Color key

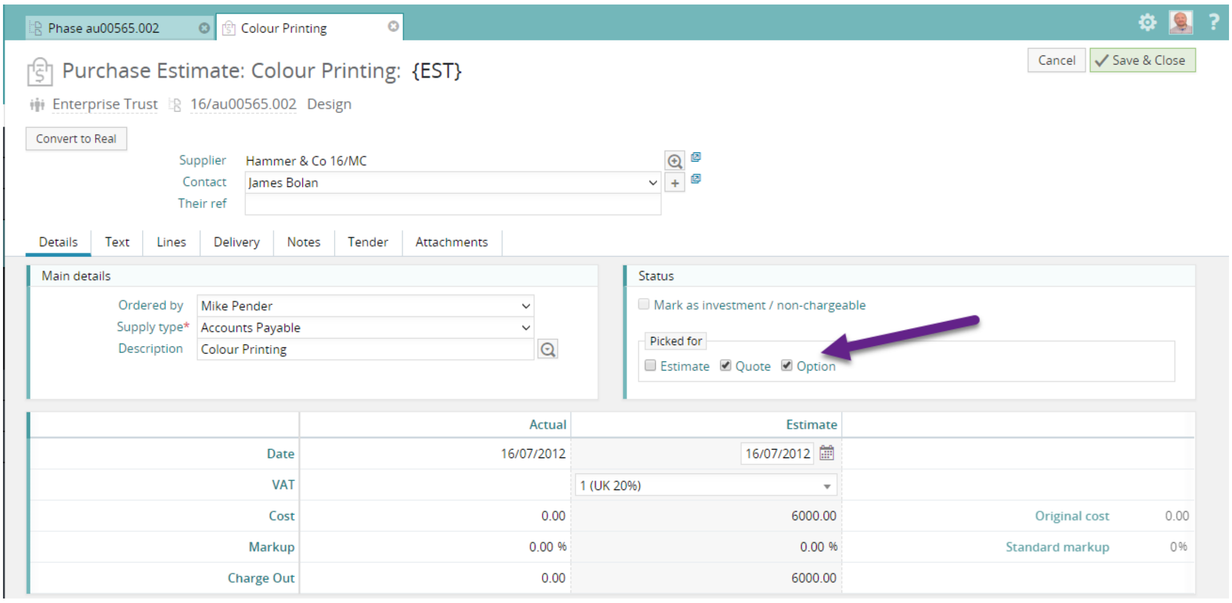
A color key has been added to the purchase orders list

Red - Invoice not received
Brown - Expense record
Green - Part invoiced purchase
Grey - Pending
Purple - Estimate



Purchase options

A purchase order can be marked as an 'option'



A purchase estimate can be marked as an 'Option'. By doing this any quote generated from the estimate will automatically reflect the optional character of this purchase.

Typically, this feature can be employed when an account handler wishes to quote his client for design & artwork, and then have a separate section on the quote for 'Options'. In this options area of the quotation, the client would be offered various options with regard to print-runs.

To generate this quotation the handler would have typically put the print purchase out to tender and may now have several purchase estimates from various print suppliers. Each of these purchase estimates may have several purchase lines showing the prices on offer for different print runs.

A purchase order would then be selected for the quote but marked as an OPTION to make it clear that only part of the purchase order is to be ordered since it contains various options – multiple prices. The quote, if generated from the estimate, will automatically include the purchase estimate and display this as an 'option' in the quote.

The client will make a choice as to which print-run option he/she wants to go with. At this point, the purchase order would normally be amended by picking the appropriate lines and its 'Option' flag will be un-ticked. At this point a new 'non-option' quote can be generated and sent to the client.

Purchase order – invoices tab

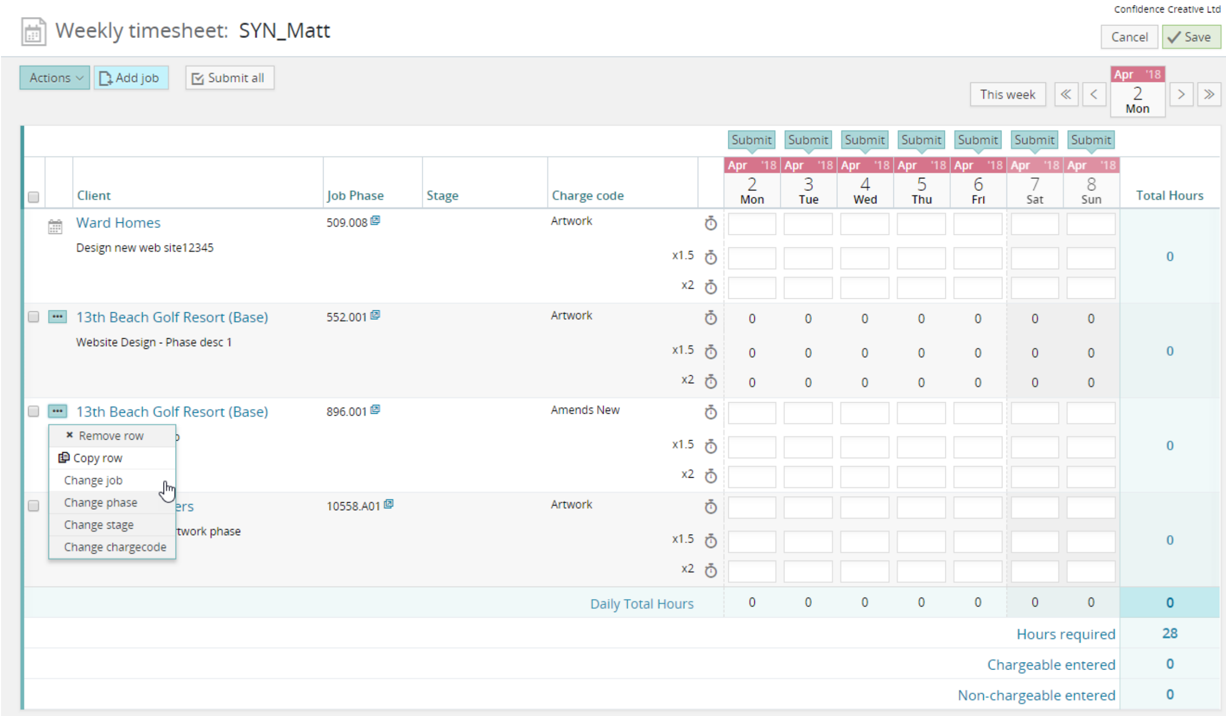
It is now possible to create a purchase invoice to match the purchase order from within the invoices tab of a purchase order.

Timesheets

Timesheet weekly - actions button

New action button on timesheet weekly

To speed up adding new jobs inside weekly timesheets a new button has been added that enables the copying of the client, job, and phase details.



Timesheet weekly default charge code

Blank charge code in timesheet weekly

If the charge code has not been set on a staff record the default will be set to blank when adding a job from inside weekly timesheets.

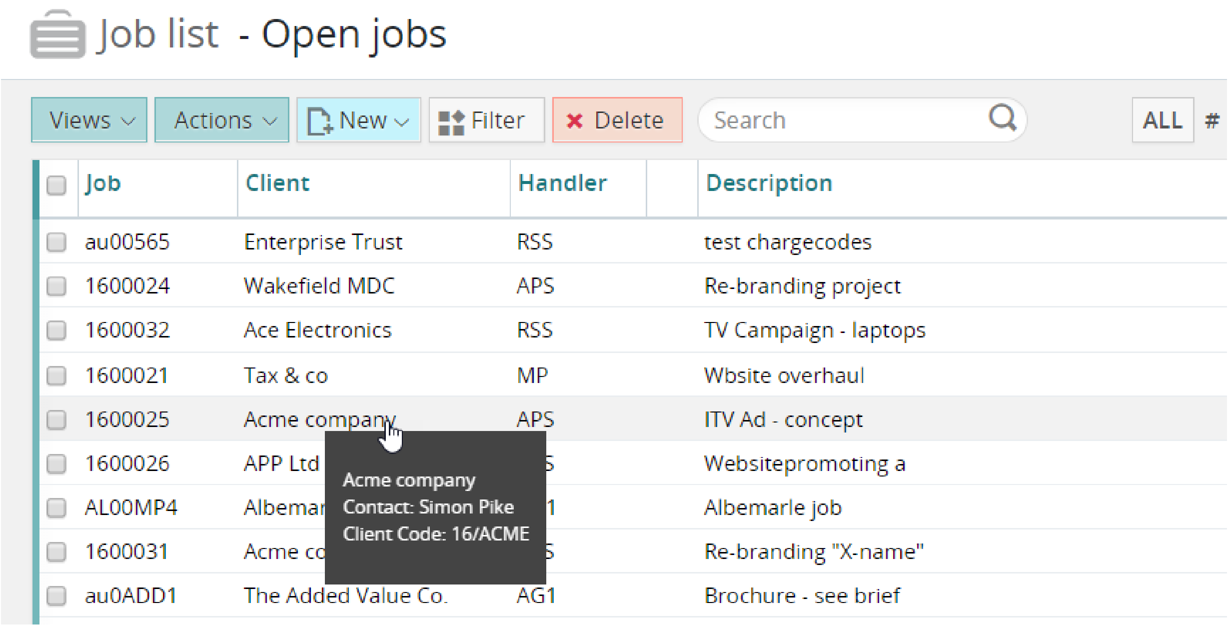
General Enhancements

Hover text

Main lists

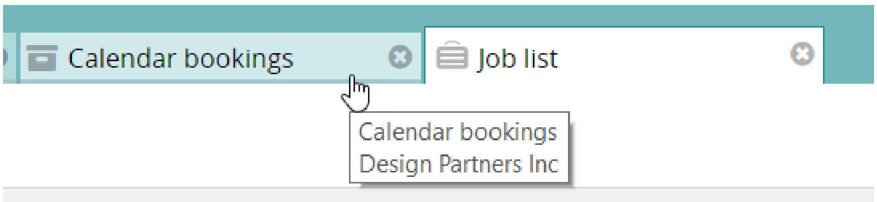
All the main lists now have hover text associated with the columns. The text shown is associated with the column the user is hovering over.

E.g. the client column of the job list displays information about the client.



Main tabs

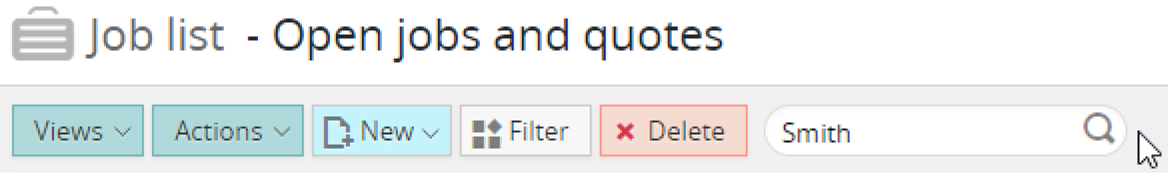
For users who often have multiple companies open at the same time the hover on the tab is a useful way of identifying the company selected for the tab in question.



Automatic searching

Automatic searching on search text

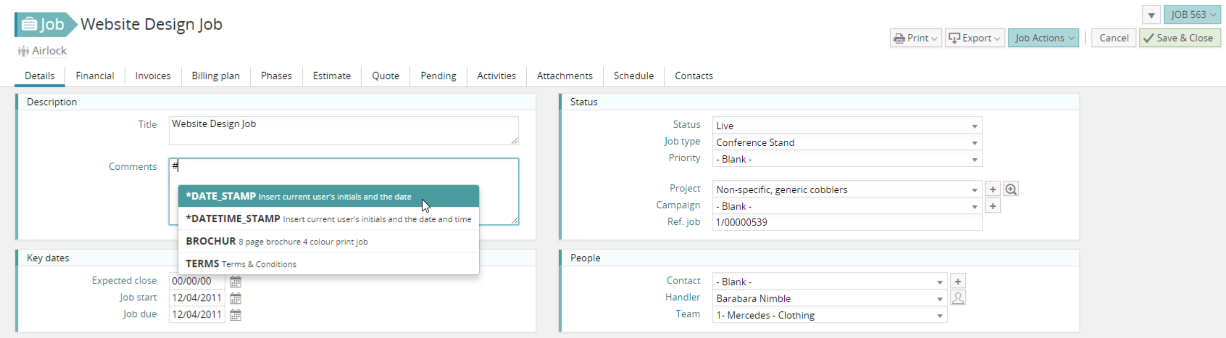
When a user enters text into one of the search inputs and pauses, an automatic search of the text entered is triggered after a short period. This feature has been added to all list search areas of Synergist.



Standard paragraphs

New standard paragraphs on text areas

When entering text into a text area the user now has the ability to select from standard paragraphs. To activate a standard paragraph, the users enters a '#' symbol into a text area and a popup list of available standard paragraphs appear, the user then clicks on the required paragraph.



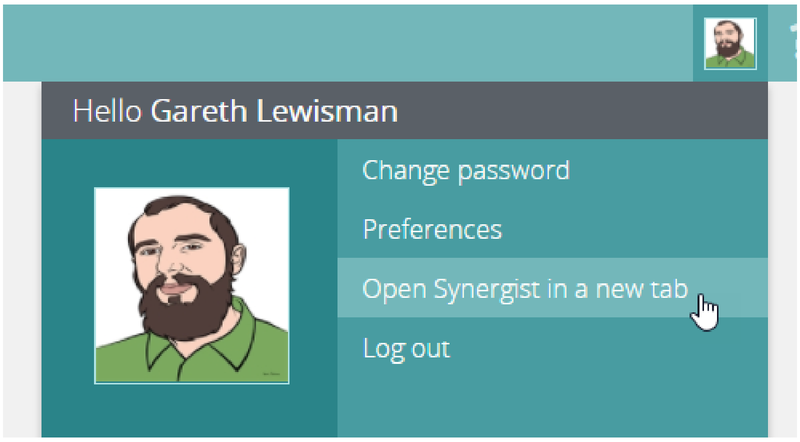
The user can create new standard paragraphs from within the FM area of Synergist.

Advanced features

'Multiple browser tabs' feature

Until version 12.2 Synergist users were restricted to running Synergist in a single tab or window of the browser. We have now introduced a new feature that enables users to have multiple copies of Synergist open at any one time on the same browser. This is particularly useful if you are clicking on links now provided in Synergist alerts. If you are already logged into Synergist in a browser the system simply opens up a new browser tab with the job/activity that you may have clicked on in your email alert.

You can also open up a second copy of Synergist from the user's avatar at the top right corner of Synergist.



Click on 'Open Synergist in a new tab'.

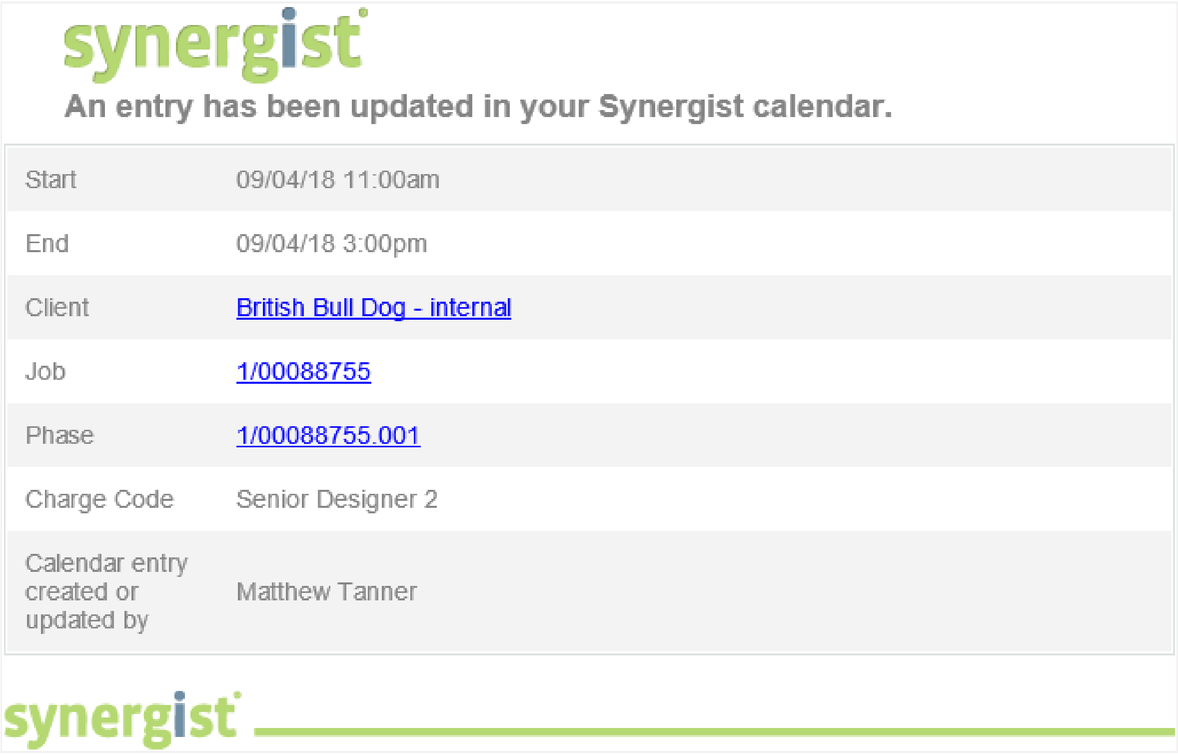
This may be useful if you were running reports in one browser tab, while looking at jobs in another. Care must be taken though. If you open up the same job in both tabs you may find you are unable to save changes since the system may assume you have already made changes to the same record in the other tab. This feature is only recommended for advanced users of Synergist.

Alert links

Links to areas within Synergist

Users are now able to click on links within email alerts sent from Synergist to quickly take them into to the relevant area.

If we look at the calendar alert, you can see that there are three links within the alert.



synergist

An entry has been updated in your Synergist calendar.

Start	09/04/18 11:00am
End	09/04/18 3:00pm
Client	British Bull Dog - internal
Job	1/00088755
Phase	1/00088755.001
Charge Code	Senior Designer 2
Calendar entry created or updated by	Matthew Tanner

synergist

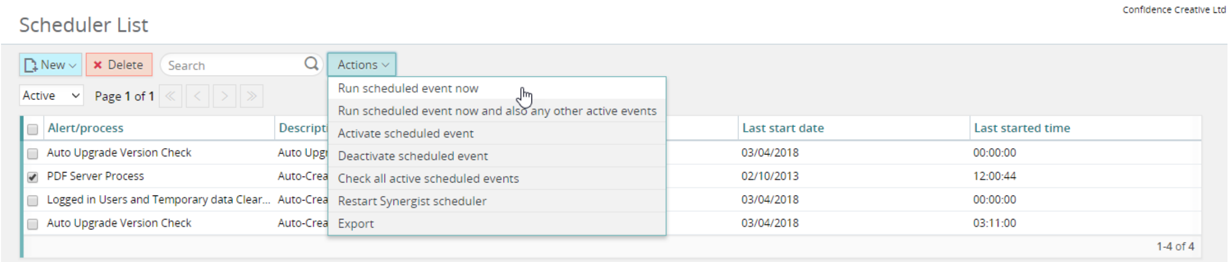
By clicking on the job link in this instance, the user is taken directly to job 00088755 within company one.

Please note: if the user is not already logged in to Synergist when the link is clicked, he/she will be required to login, after which the user is redirected to the original link target location. See section above regarding the 'Multiple browser tabs' feature. If Synergist is already opened accessing synergist via an alert will open an additional instance of Synergist in a new browser tab.

Scheduled events

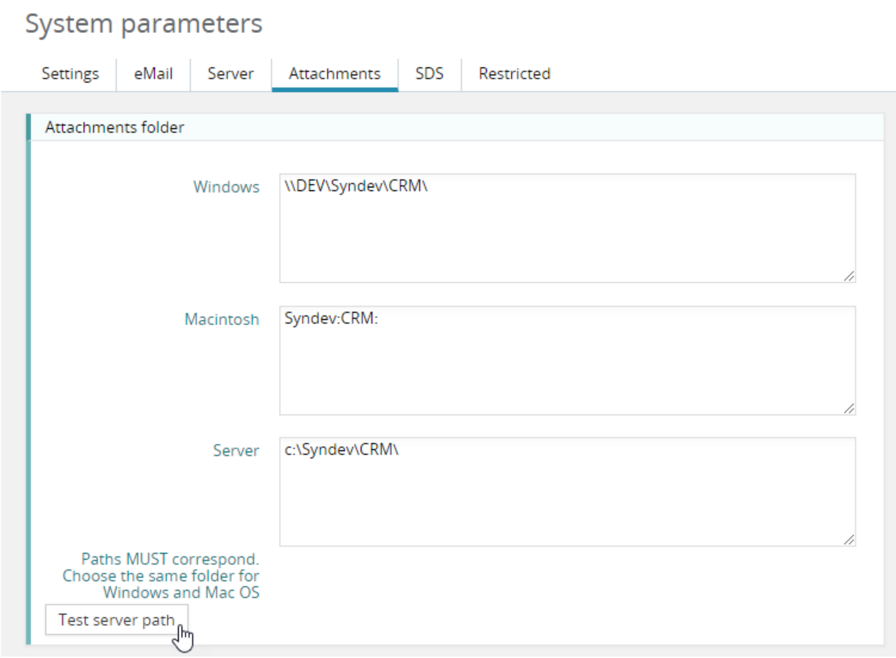
Run scheduled event now

The functionality has been added to the scheduler list to enable the user to trigger the running of a single event. To run a single event, select the scheduled event from the list using the checkboxes to the left of the event name and select the run scheduled event now from the actions button.



Test path feature

For testing server attachment path is valid.



Assume identity

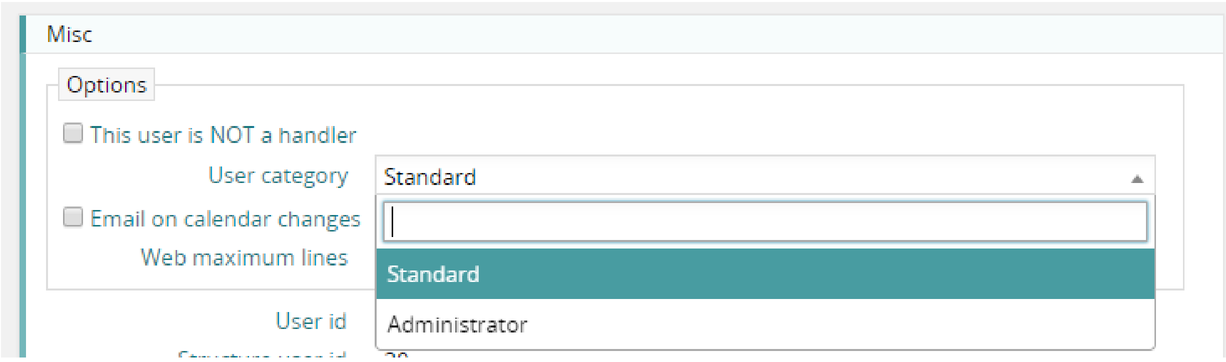
Assume user identity

To assume the identity of another user you simply need to be logged in to Synergist as an administrator. From the users list within file maintenance select the user you wish to assume using the checkbox to the left of the name and select login as user from the actions button.

Administrator user category

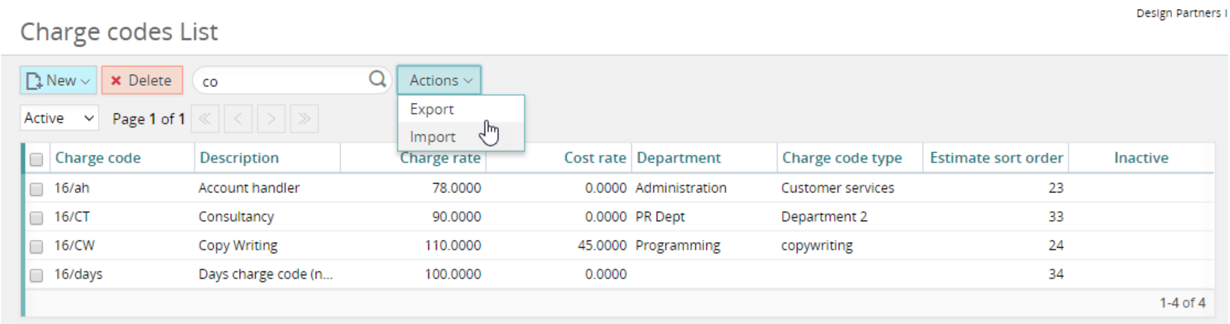
User categories

Users can now be given 'administrator' rights. A new user category field add to the user record. By default, a user is a 'Standard' user. However, the Administrator and choose to give a normal user administrator rights by changing his/her user category to 'Administrator'. As an administrator, a user can assume the identity of another user (see above).



File maintenance tables

Options to export and import



Synergist API v3.2

The new v3.2 API adds new functionality to Synergist API and also consolidates the previous Synergist APIs

Previous APIs

V2.2 – a simple read only XML API for accessing data from a wide range of tables
V3.0 – An API designed to enable 3rd parties to build applications for imputing times sheets and expenses.
V3.1 - Read write API supporting Activities, attachments & job create from a template

The above APIs are deprecated but still fully supported in Synergist 12.2

API 3.2

API v3.2 provides new API calls to support the features summarized above.

The API has also been enhanced to support the creation and amending of purchase estimates /orders.

For more information regarding the new 3.2 API please contact Synergist support.