

synergist[®]

Version 12.2 - Release Notes

Synergist Browser Interface

[Intentionally blank page]

Contents

SYNERGIST V12.2 RELEASE	7
Overview	7
ACCOUNTS LINKS	8
Exporting a csv of a postings batch	8
Kashflow integration	8
ACTIVITIES & ATTACHMENTS	9
Activity list - redesign	9
Follow ups - tab added to the activity record	9
Comments/history - alerts	10
Addition to the activities export csv	11
BILLING PLANS	12
Changing exchange rate	12
Billing plan report/export	12
Remaining to plan	12
Default offset	12
Revenue recognition	13
Tenders	15
CLIENTS & CONTACTS: GDPR	16
GDPR - General Data Protection Regulation	16
Ex clients - filter option	22
Invoice content builder	22
Linked clients	22
CALENDAR BOOKINGS	23
New loading view	23

Single day view	27
Filtered view	28
Requisitions	31
Accessing the calendar	32
User interface enhancements	33
CALENDAR - MYCALENDAR	36
User Interface (UI)	36
Timer	40
Calendar booking feedback	42
ESTIMATING & QUOTING	46
Estimate - foreign currency	46
Line detail	46
Add estimate to quote	47
JOBS & PHASES	48
Transfer cost utility	48
Re-cost job utility	49
Quote multi select checkbox	49
Phase monthly create options	50
Special stages	51
Job phase list columns	52
Job phase actions	52
INVOICING	53
Batch actions	53
Exports	53
Net to invoice	54
Warning	54
Line detail	55
REPORTING	56
Data viewer tool	56

Period profit report	57
Cost & quotes report	57
WIP detail export added to the job/phase cards	58
Billing plans summary report	58
REVENUE MANAGEMENT	59
Revenue management screen	59
Costs	59
Recognizing and deferring revenue	60
SUPPLIERS & PURCHASING	61
Attachments	61
Exports	63
Supplier order tab	64
Custom fields	64
Color key	65
Purchase options	66
Purchase order - invoices tab	66
TIMESHEETS	67
Timesheet weekly - actions button	67
Timesheet weekly default charge code	67
GENERAL ENHANCEMENTS	68
Hover text	68
Automatic searching on search text	69
Standard paragraphs	69
ADVANCED FEATURES	70
'Multiple browser tabs' feature	70
Alert links	71
Scheduled events	72
Assume identity	73
Administrator user category	73

File maintenance tables	73
Synergist API v3.2	74

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.

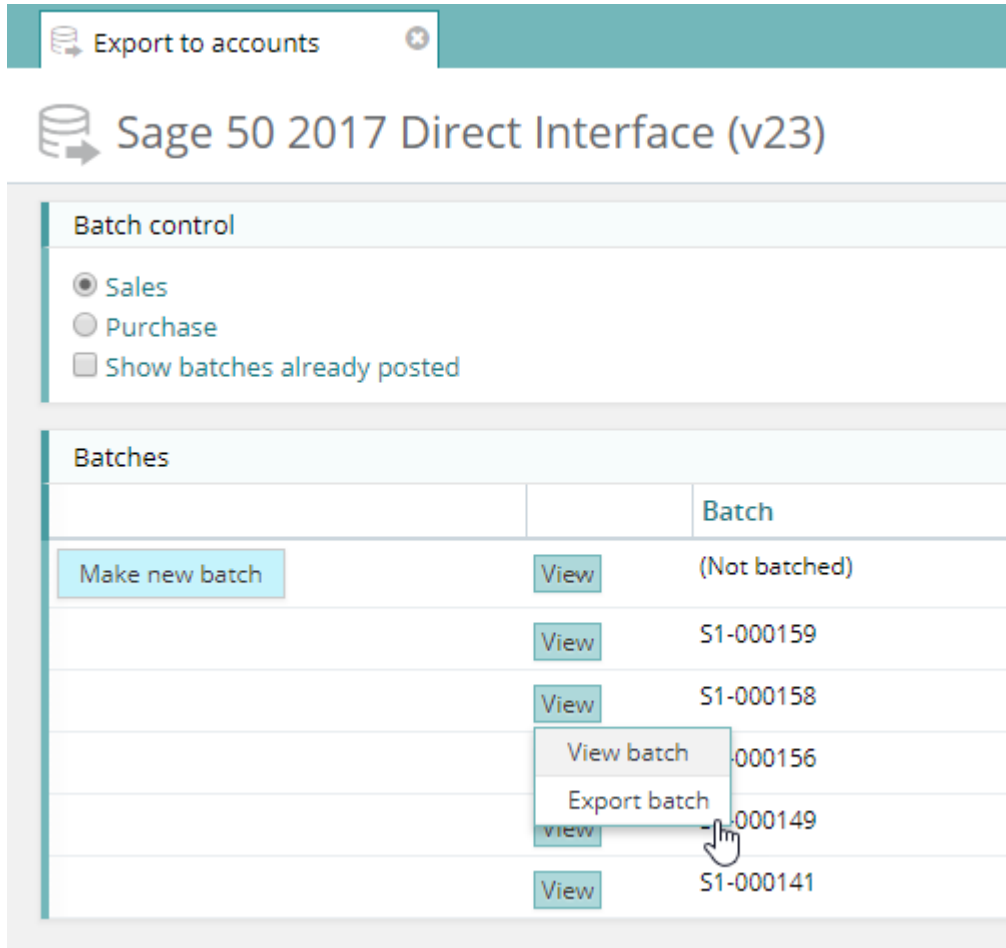
Please note: These release notes relate to the Synergist browser interface only.

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.



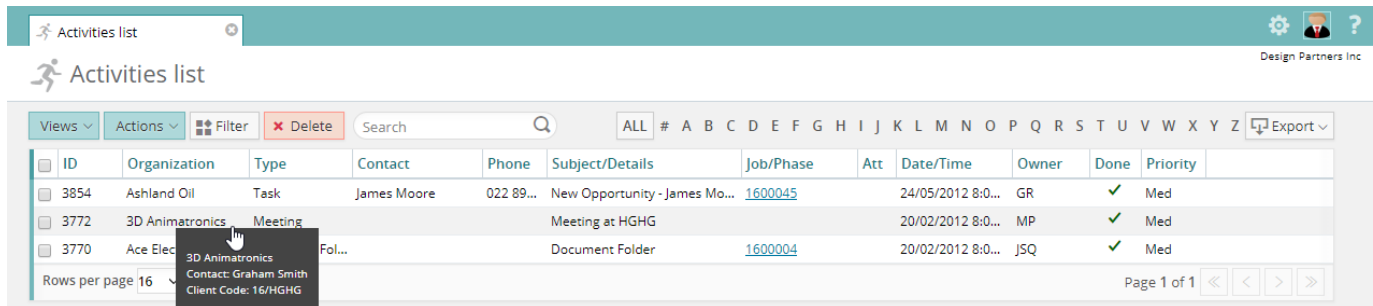
Kashflow integration

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

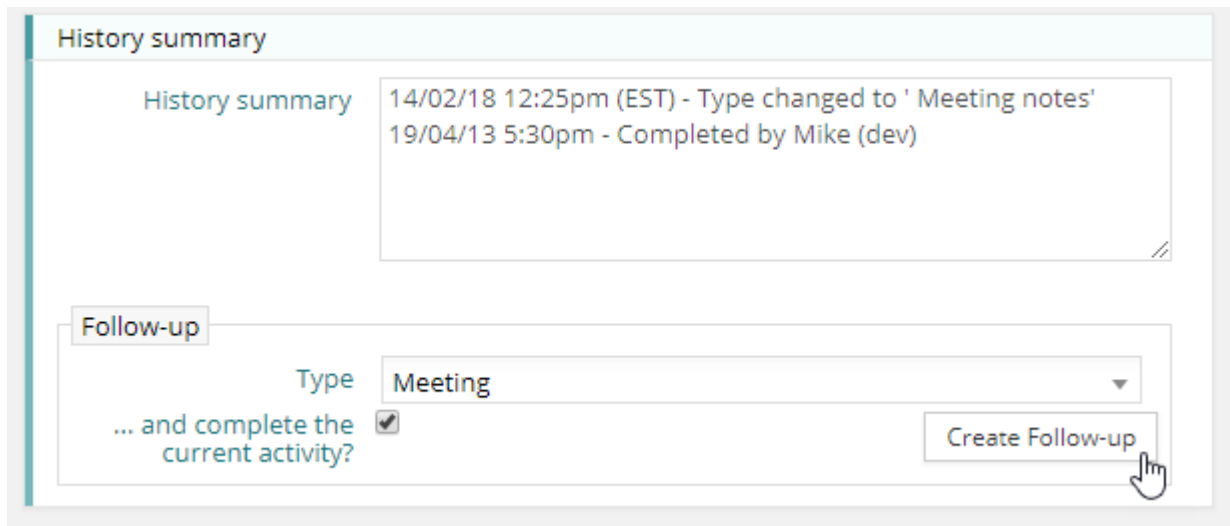
Activity list - redesign

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.

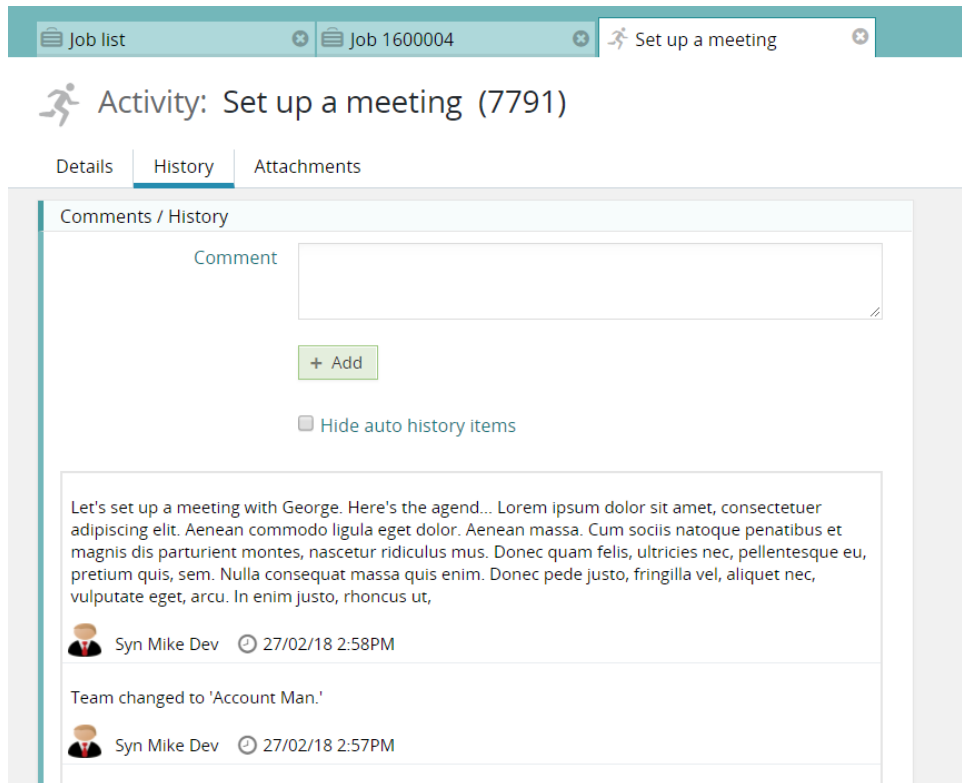


If you have created one or more follow-ups you can track these, and access them, via the new 'follow-ups' tab on an activity record. This tab is only visible if the activity has related follow-up records.

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.

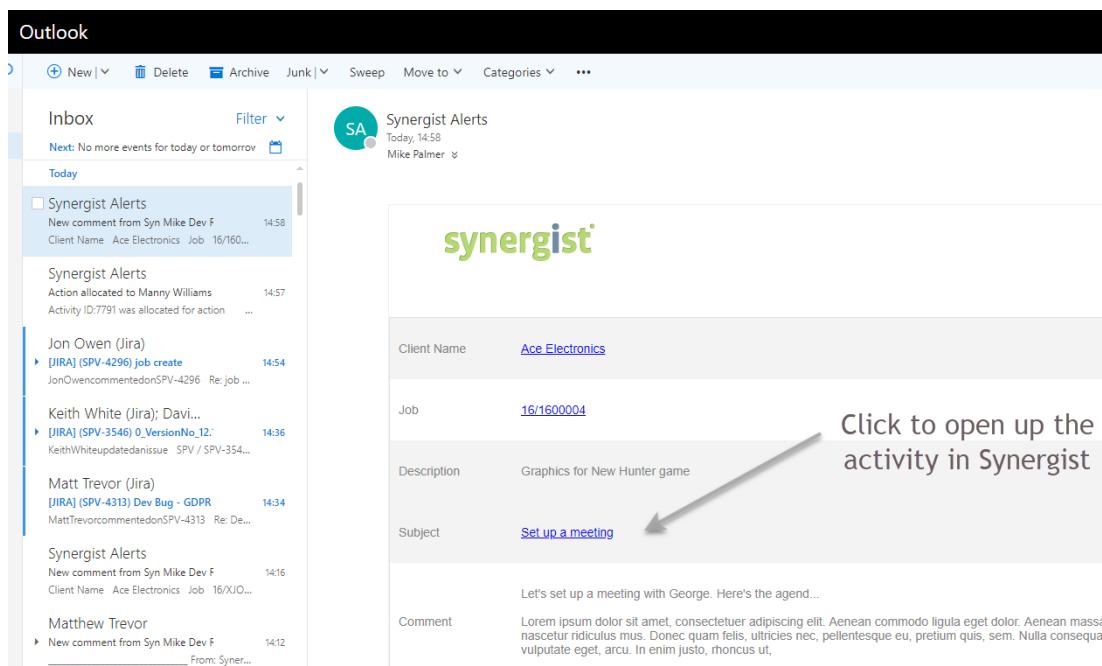


The screenshot shows the Synergist interface. At the top, there is a job list with three items: 'Job list', 'Job 1600004', and 'Set up a meeting'. Below this, the 'Activity: Set up a meeting (7791)' is displayed. The activity page has tabs for 'Details', 'History', and 'Attachments'. The 'History' tab is active, showing a 'Comments / History' section. There is a text input field for a comment, an '+ Add' button, and a 'Hide auto history items' checkbox. Below this, there are two history items. The first is a comment by 'Syn Mike Dev' at '27/02/18 2:58PM' with the text: 'Let's set up a meeting with George. Here's the agend... Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut,'. The second history item is 'Team changed to 'Account Man.'', also by 'Syn Mike Dev' at '27/02/18 2:57PM'.

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.



The screenshot shows an Outlook email interface. The 'Inbox' is visible on the left, with a 'Synergist Alerts' folder expanded. The selected email is from 'Synergist Alerts' (Today, 14:58) by 'Mike Palmer'. The email body shows the Synergist logo and the following details:

Client Name	Ace Electronics
Job	16/1600004
Description	Graphics for New Hunter game
Subject	Set up a meeting

Below the details, there is a comment: 'Let's set up a meeting with George. Here's the agend...'. An arrow points from the text 'Click to open up the activity in Synergist' to the 'Set up a meeting' link in the subject field.

Addition to the activities export csv

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

Activities list

Design Partners Inc

The screenshot shows a web interface for 'Activities list'. At the top, there are buttons for 'Views', 'Actions', 'Filter', and 'Delete', along with a search bar. Below these is a table with columns: ID, Organization, Type, Contact, Phone, Subject/Details, Job/Phase, Att, Date/Time, and Owner. Three rows of activity data are visible. A dropdown menu is open over the 'Export' button, listing options: 'Detail report with history', 'Detail report', 'Activity report', 'Client details', and 'Export'. A mouse cursor is pointing at the 'Export' option. At the bottom of the interface, there is a 'Rows per page' dropdown set to 16 and a 'Page 1 of 1' indicator with navigation arrows.

ID	Organization	Type	Contact	Phone	Subject/Details	Job/Phase	Att	Date/Time	Owner
3854	Ashland Oil	Task	James Moore	022 8...	New Opportunity - Jam...	1600045		24/05/2012 ...	GR
3772	3D Animatron...	Meeting			Meeting at HGHG			20/02/2012 ...	MP
3770	Ace Electronics	Document...			Document Folder	1600004		20/02/2012 ...	JSQ

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)

The screenshot shows a software interface for a billing plan. At the top, there's a header for 'Graphics for New Hunter game' with a job ID 'JOB 1600004'. Below this are navigation tabs: Details, Financial, Invoices, Billing plan (selected), Phases, Estimate, Phase quotes, Pending, Activities, Attachments, Schedule, Special, and Contacts. A table below the tabs shows the billing plan details. The table has columns: Phase, Month, Year, %, Planned value, Notional costs, Profit forecast, % Wgt, Billed, Invoices, and Comment. The data rows are:

Phase	Month	Year	%	Planned value	Notional costs	Profit forecast	% Wgt	Billed	Invoices	Comment
004	Apr	2012	45	£9.00	£0.00	£9.00		£0.00		
003	Jul	2012	10	£300.00	£0.00	£300.00		£0.00		
003	Aug	2012	33.33	£999.90	£0.00	£999.90		£0.00		
003	Sep	2012	33.34	£1000.20	£0.00	£1000.20		£0.00		
Totals			38.36	£2309.10	£0.00	£2309.10		£0.00		

At the top right of the table area, it says 'Remaining to plan: £3710.90'.

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.

Company settings

The screenshot shows the 'Billing Plans' settings page. It has a navigation bar with tabs: Details, Defaults, Codes, Accounts, Accounts Details, Periods, Switches, Billing Plans (selected), and Job Cu. Below the navigation bar are sub-tabs: Users, Flowzone, and Log. The main content area is titled 'Billing plans' and contains the following settings:

- Enable billing plans
- Billing plan levels allowed: Phase only
- Options:
 - Synched with quote
 - Notional costs/profit
 - Enable weighting
- Relative dates:
 - Fixed or Relative: Relative to
 - Date to use for job BPs: Job start date/expected close date
 - Date to use for phase BPs: Phase start date
 - Default offset (Months): 3
 - Enable auto 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 a 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

Phase Website update
Ace Electronics

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

Actions New Delete Base Euros Remaining to plan: £0.00

Month	Year	%	Planned value	Recognized	Notional costs	Profit forecast	% Wgt	Billed	Invoices	Comment
Jun	2013	50	£187.50	£120.00	£100.00	£20.00		£0.00		
Aug	2013	50	£187.50	£255.00	£50.00	£205.00		£0.00		
Totals		100	£375.00	£375.00	£150.00	£225.00		£0.00		

Billing plan item

Opening up an individual plan (typically the plan for a 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.

Planned values

%	Planned value	Notional costs	Profit forecast
50.00	187.50	100.00	20.00
Currency		215.63	
Recognized	120.00		

Manual planned value
 Synchronise planned value with quote
 Bacs 1st payment

Invoicing the billing plan

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

Phase Website update
Ace Electronics

Details Financial Invoices Billing plan Time Materials

Actions New Delete Base Euros

	%	Planned value
Invoice selected using quote content	50	£187.50
Invoice selected using BP content	50	£187.50
Use AUTO billing plans for this phase	50	£187.50
Show Weighted values	100	£375.00

Invoice generated from billing plan

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

Draft invoice: D1600221

Ace Electronics 16/au00023.001 Website update

Type: Invoice
Final:
Inv date: 06/04/2018
Order number:
Invoice currency: Euros
Exchange rate: 1.15

Details | Content | Jobs/Phases Invoiced | Allocated costs | Address | Financial | Notes | Phase allocations

Actions

Description	Quantity	Unit price	Net total	VAT	VAT amount
au00023.001 Website update	1	187.5000	187.50	1 (UK 20%)	37.50
		EUR 215.6300	215.63		43.13
Totals			187.50		37.50
EUR			215.63		43.13

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.

Details | Content | Jobs/Phases Invoiced | Allocated costs | Address | Financial | Notes | Phase allocations

Job Phase	Description	PT	C	Already recognized	Recognize now	Total recognized	Total billed	Deferred now	Deferred total
16/au00023.001	Website update	DES		0.00	120.00	120.00	187.50	67.50	67.50
Value					£120.00	£120.00	£187.50	£67.50	£67.50
Total target value							£187.50		
Difference							£0.00		

Auto allocate

Cost Actual Quote
 Charge Estimate Billing plan
 Tickoff

Auto Clear

Tenders

Line detail notes

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

The screenshot displays the 'Tender' management interface. At the top, there are 'Cancel' and 'Save & Close' buttons. Below the title, the tender details are shown: '13th Beach Golf Resort (Base)', '1/00010817.001', and 'SPV-3412- test 2'. The 'Date' is set to '29/03/2018', 'By' is 'SYN_Matt', and the 'Deadline' is '08/04/2018' at '12:00 AM'. The interface has two tabs: 'Details' and 'Lines', with 'Lines' being the active tab. A table lists the tender lines:

Line	Description	Quantity	Picked	Actions
1	Tender Line 1 Additional tender line notes.	10	<input type="checkbox"/>	Notes icon, Close icon
2	Tender Line 2	20	<input type="checkbox"/>	Notes icon, Close icon

A tooltip 'Add note' is visible over the notes icon for 'Tender Line 1'. The 'Additional tender line notes.' text is shown in a text area below the description for line 1.

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.

Client contact list > Graham Smith

Client contact: Graham Smith

Details | Roles/functions | **Notes/privacy** | Activities | Attachments

Data protection

Opt-in to communications

Additional preferences

- Opt out of email
- Opt out of mail
- Opt out of phone
- Opt out of mobile
- Opt out of SMS

Contact Notes

Notes

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.

Client contact list | Graham Smith

Client contact: Graham Smith

Details | Roles/functions | **Notes/privacy** | Activities | Attachments

Data protection

Opt-in to communications

Opt-in details

Verified

Source

Notes

Verbal

Website Marketing Info Request

Additional preferences

Opt out of email

Opt out of mail

Opt out of phone

Opt out of mobile

Opt out of SMS

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 by simply hovering over the 'Opt-in to communications' label

Client contact list | Graham Smith

Client contact: Graham Smith

Details | Roles/functions | **Notes/privacy** | Activities | Attachments

Data protection

Opt-in to communications

Opt-in details

Verified

- 2018/02/27 10:28:16 MP Opted in verified
- 2018/02/27 10:26:41 MP Opted in verified
- 2018/01/30 17:15:33 LM Opted in verified

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.

Client contact list | Client contact list - Active client contacts

Views | Actions | Filter | Delete | Search

Name	Role	Organization
<input type="checkbox"/> Steve Daily		3D Animatronics
<input type="checkbox"/> Graham Smith	Head of Marketing & Business Development	3D Animatronics
<input type="checkbox"/> Jim Alert		3D Animatronics
<input type="checkbox"/> Brett Craft		Accounting Solutions for Business
<input type="checkbox"/> George Green		Ace Electronics
<input type="checkbox"/> Simon Pike		Acme company
<input type="checkbox"/> Jim Green		Acme company
<input type="checkbox"/> Nadim Alam	Director	Acme company
<input type="checkbox"/> Freda Billingsgate	Sales manager	Acme company
<input type="checkbox"/> Kirsty Staines	Marketing Manager	Aecom Inc
<input type="checkbox"/> Fay Sweet	Director of Communications	Aecom Inc

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'.

The screenshot displays the 'List filter' interface for a 'Client contact list'. The interface is organized into several sections:

- Query:** Includes a 'Search for' text input field and a 'Filter by date' checkbox.
- More filters:** Features a 'Show inactive options' checkbox and two expandable filter categories: 'Client' and 'Client contact'.
- Client contact filters:**
 - Contact functions:** A dropdown menu with a copy icon.
 - Status:** A dropdown menu currently set to 'Both active and inactive'.
 - Data protection:** A section with a title bar.
 - Communication:** Contains two radio buttons: 'Opted in' (checked) and 'Not opted in'.
 - Verified:** Contains two radio buttons: 'Verified' and 'Unverified' (checked).
 - Source:** A dropdown menu currently set to 'Mailchimp' with a copy icon.

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.

SMS

Opted out Not opted out

Filter using email addresses

Paste a list of email addresses here.

graham.smith@3DAnim.com
fb@acme.co.uk
bradley@email.com

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.

Client contact list

Client contact list

Views Actions Filter Delete Search Export

Name	Role	Organization	Phone	eMail	Opted in
Graham Smith	Head of Marketing & Business Develo...	3D Animatronics	020 7297 5600	graham.smith...	<input checked="" type="checkbox"/>
Freda Billingsgate	Sales manager	Acme company	0161 555 1234	fb@acme.co.uk	<input type="checkbox"/>
Bradley Wilson		AG Site Services		bradley@email...	<input type="checkbox"/>

Rows per page 16 1-3 of 3 Page 1 of 1

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'

Data Protection

Opt in Don't opt in

Opt-in details

Verified Source Not verified

Additional preferences

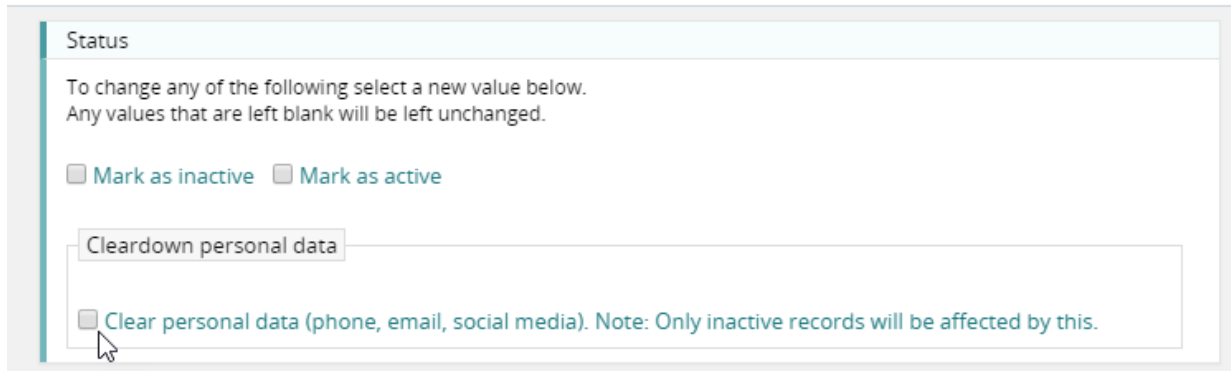
Opt out of mail Dont opt out of mail
 Opt out of email Dont opt out email
 Opt out of phone Dont opt out phone
 Opt out of mobile Dont opt out mobile
 Opt out of SMS Dont opt out SMS

Mailchimp
Verbal
Website Marketing Info Request

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.

Client contacts batch process for 255 records



The screenshot shows a web interface for a batch update process. At the top, there is a header labeled "Status". Below the header, a message reads: "To change any of the following select a new value below. Any values that are left blank will be left unchanged." There are two radio button options: "Mark as inactive" and "Mark as active". Below these is a section titled "Cleardown personal data" which contains a single radio button option: "Clear personal data (phone, email, social media). Note: Only inactive records will be affected by this." A mouse cursor is positioned over the "Clear personal data" option.

Ex clients – filter option

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

Ex client

Ex client Not ex client

Invoice content builder

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

The screenshot shows the 'Invoice content builder' interface for 'Ace Electronics'. The interface includes a navigation bar with tabs for Details, Contacts, Activities, Attachments, Financial, Targets, Invoices, Jobs, Phases, My projects, My sub projects, Notes, Prices, SDS, SDS data, Invoice content (selected), and Users. The main content area is divided into two panels. The left panel, titled 'Invoice Builder', contains fields for Code (16/DHPORTA) and Name (Ace Electronics), an 'Override company settings?' checkbox, a dropdown for 'Job or phase description', a 'By' dropdown (Job), a 'Using' dropdown (Description), and checkboxes for 'Include detail text on quote content', 'Invoices default to final', and 'Writeoffs default to final'. The right panel, titled 'Cost roll-up options', has a 'Break by job/phase' checkbox and three sections: 'Time' (with 'Show time' checked and 'Roll-up by' set to 'No roll-up'), 'Materials' (with 'Show materials' checked and 'Roll-up by' set to 'No roll-up'), and 'Purchases' (with 'Show purchases' checked and 'Roll-up by' set to 'No roll-up'). Below these panels is an 'Auto allocate' section with a 'Use quoted values' checkbox, a 'Cost or Charge' dropdown (Charge), and an 'Allocate by' dropdown (Estimate).

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.

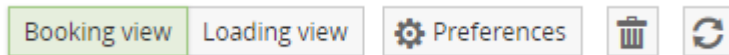
The screenshot shows the 'Jobs' tab for 'Acme company'. The interface includes a navigation bar with tabs for Details, Contacts, Activities, Attachments, Financial, Targets, Invoices, Jobs (selected), Phases, My projects, My sub projects, Notes, and Prices. Below the navigation bar is a table of jobs. The table has columns for Job, Description, Handler, Compl..., Date in, Date due, Job type, and Client. The 'Client' column shows 'Ace Electronics' for jobs 16/1600032, 16/X111111, 16/XJOBNO1, 16/X00JOB2, 16/A0BC110, and 16/au00023, and 'Acme company' for jobs 16/1600025, 16/1600031, 16/au00XERO, 16/au00XPW, 16/1600004, and 16/au00023. A purple arrow points to the 'Client' column header.

Job	Description	Handler	Compl...	Date in	Date due	Job type	Client
16/1600032	TV Campaign - laptops	Rob Shearer		14/03/2012	31/03/2012	Display	Ace Electronics
16/1600025	ITV Ad - concept	Arthur Spring		05/03/2012	22/05/2012	Television AD	Acme company
16/1600031	Re-branding "X-name"	Arthur Spring		31/01/2012	31/05/2012	Re-branding	Acme company
16/X111111	Television ad - Summer campaign	Rob Shearer		25/06/2012	24/07/2012	Television AD	Ace Electronics
16/XJOBNO1	Pitch - new ad campaign	Rob Shearer		25/06/2012	24/07/2012	Pitch Job	Ace Electronics
16/X00JOB2	Brochure re-design	Rob Shearer		25/06/2012	24/07/2012		Ace Electronics
16/A0BC110	Photography - Dec shots	Rob Shearer		25/06/2012	24/07/2012		Ace Electronics
16/au00XERO	Xero ad	Arthur Spring		08/04/2013	08/04/2013	Brochure	Acme company
16/au00XPW	Summer campaign	Arthur Spring		06/01/2015	06/01/2015	Display	Acme company
16/1600004	Graphics for New Hunter game	Jenna Quinn		01/02/2018	31/05/2018	Game design	Ace Electronics
16/au00023	Website update	Rob Shearer		01/03/2013	31/07/2018	Website Design	Ace Electronics

Calendar bookings

New loading view

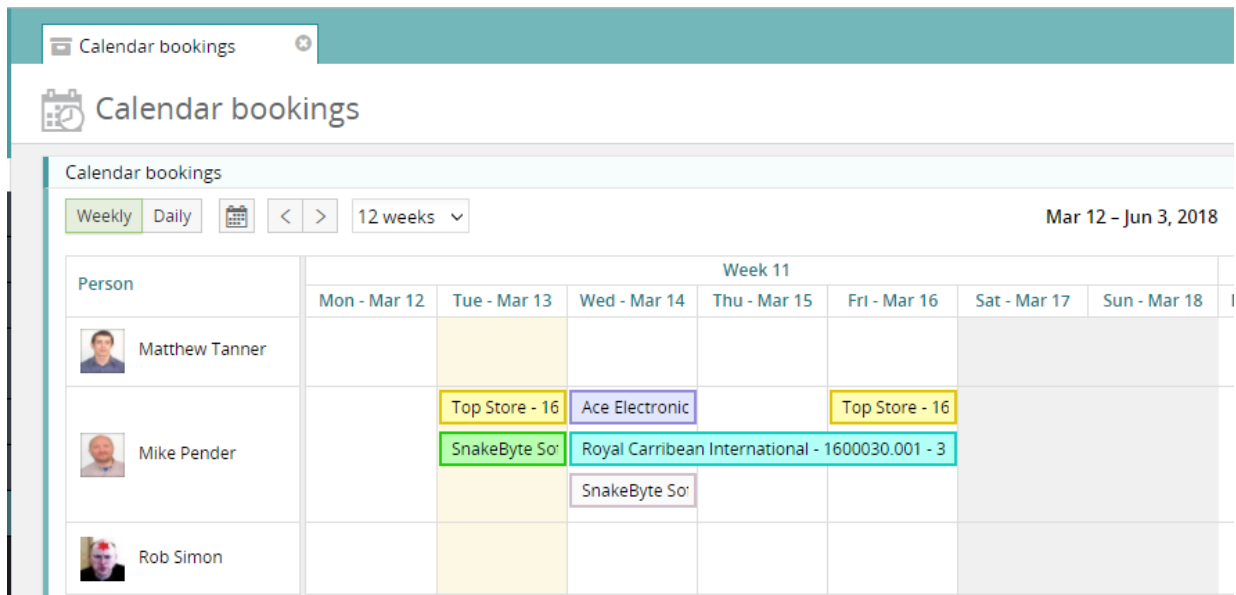
The calendar view can be switched between 'Booking view' and 'Loading view'






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.



Calendar bookings		Week 11						
		Mon - Mar 12	Tue - Mar 13	Wed - Mar 14	Thu - Mar 15	Fri - Mar 16	Sat - Mar 17	Sun - Mar 18
Person								
 Matthew Tanner								
 Mike Pender			Top Store - 16	Ace Electronic		Top Store - 16		
			SnakeByte So	Royal Carribean International - 1600030.001 - 3				
				SnakeByte So				
 Rob Simon								

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

Calendar bookings		Week 11						
		Mon - Mar 12	Tue - Mar 13	Wed - Mar 14	Thu - Mar 15	Fri - Mar 16	Sat - Mar 17	Sun - Mar 18
Matthew Tanner								
Mike Pender		9	7	3	6			
Rob Simon								

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.

Person		Week 11				
		Mon - Mar 12	Tue - Mar 13	Wed - Mar 14	Thu - Mar 15	Fri - Mar 16
Matthew Tanner						
Mike Pender			9	7	3	6

Top Store - 16

SnakeByte So:



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


Person	Week 11				
	Mon - Mar 12	Tue - Mar 13	Wed - Mar 14	Thu - Mar 15	Fri - Mar 16
 Matthew Tanner					
 Mike Pender		9	7	3	6
 Rob Simon		Top Store - 16			
 Helen Whitley		SnakeByte So			

Client: SnakeByte Software
 Job phase: 16/A050003.001
 Job desc: New Game Logo for upcoming new game
 Charge code: Senior Designer 2
 Staff: Mike Pender
 Handler: Dave Harvey
 Start time: Mar 13, 01:00 PM
 End time: Mar 13, 05:00 PM
 All day: No
 Duration: 4 hours

Adjusting the loading


The booking can be moved by simple drag and drop.



Person	Week 11				
	Mon - Mar 12	Tue - Mar 13	Wed - Mar 14	Thu - Mar 15	Fri - Mar 16
 Matthew Tanner					
 Mike Pender		9	7	3	6
		Top Store - 16			
		SnakeByte So			



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

Calendar bookings

Weekly Daily  < > 12 weeks ▼

Person	Week 11				
	Mon - Mar 12	Tue - Mar 13	Wed - Mar 14	Thu - Mar 15	Fri - Mar 16
 Matthew Tanner					
 Mike Pender		5	7	7	6

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.

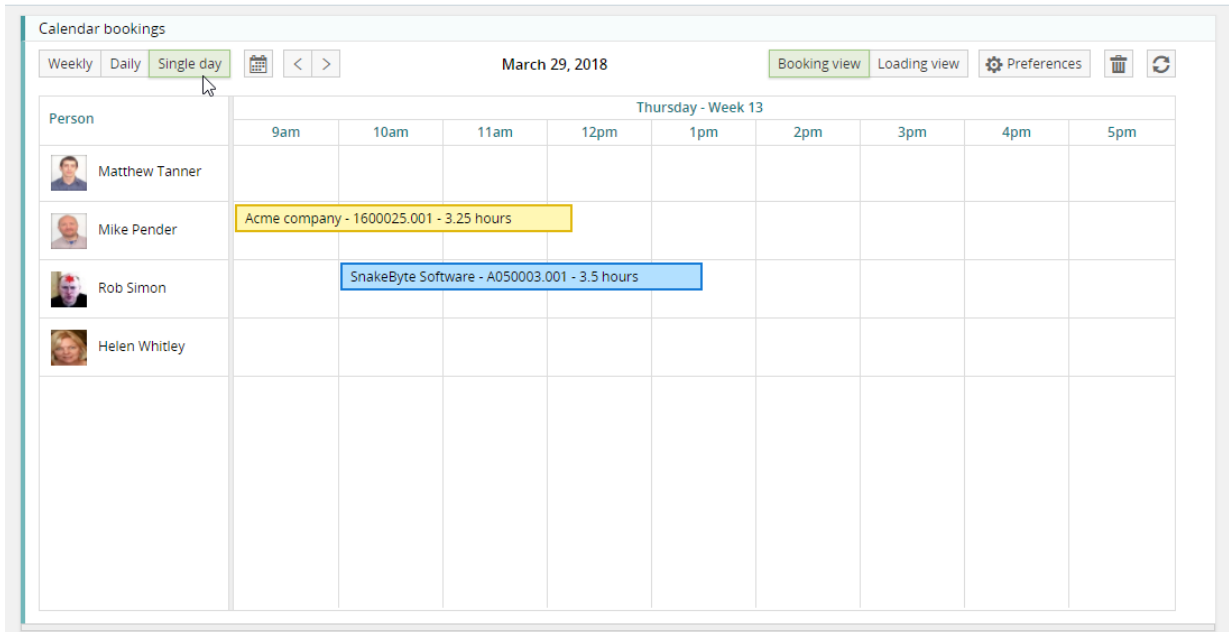
Mar 13 - Apr 9, 2018									
Week 11									
Wed - Mar 14									
9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm
2	3		3		3		0.5		

Single day view




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

Calendar bookings





© Synergist 2018



Calendar bookings

Weekly Daily **Single day**  < > **March 29, 2018** Booking view Loading view Preferences  

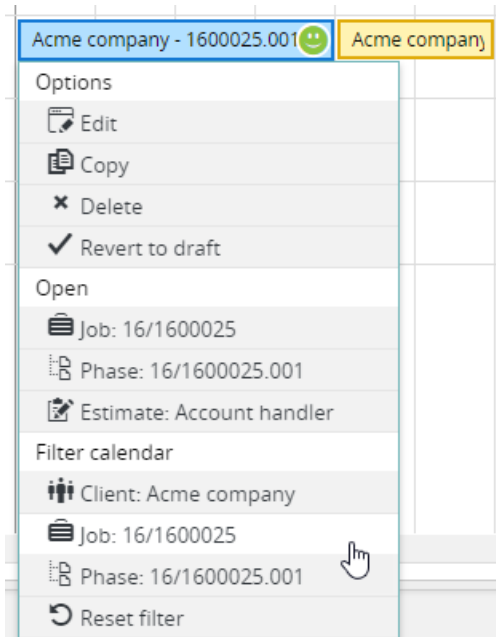
Person

	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm
 Matthew Tanner									
 Mike Pender		Acme company - 1600025.001 - 3.25 hours							
 Rob Simon			SnakeByte Software - A050003.001 - 3.5 hours						
 Helen Whitley									

Filtered view

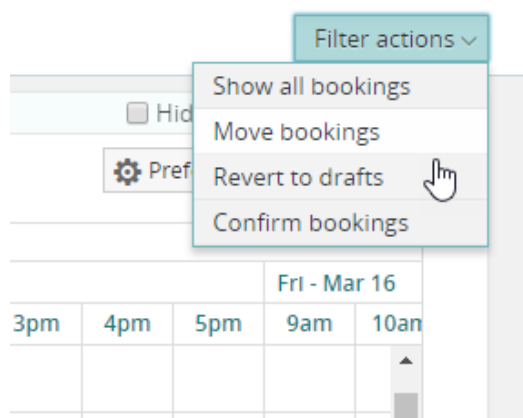
It is possible to filter the calendar view so that only bookings for a particular client/job/phase are displayed. This is done using the right click contextual menu or by accessing the menu via a job/phase.

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.

Move bookings ✕

Bookings selected

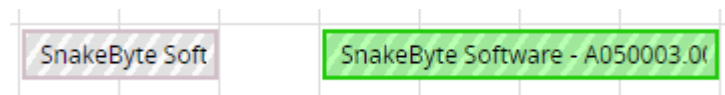
From 14/03/2018  2 bookings selected.

How far to move

Number of weeks

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.

The screenshot displays a web-based preferences form. On the left, the 'Job/Phase status' section contains five checked checkboxes: 'Quote', 'Live', 'In-house', 'On hold', and 'Special'. Below these is a 'Display' section with a 'Number of lines' dropdown menu set to '6'. On the right, the 'Filters' section is divided into three categories: 'For filtering jobs' (with 'Company' set to 'Design Partners Inc', and 'Handler team' and 'Handler' as empty dropdowns), 'For filtering estimates' (with 'Staff team' and 'Charge code' as empty dropdowns), and 'For filtering requisitions' (with 'Activity type' as an empty dropdown). A dropdown menu is open for 'Activity type', showing '- All -' and 'Requisition'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Requisitions

Open requisition

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

Calendar booking: Acme company

1600025 ITV Ad - concept
001 ITV Ad - concept
Mike Pender: Creative Thinking

Booking details

Tentative Draft Colour

All day

Start 21/03/2018 13:00:00
End 21/03/2018 15:00:00

Hours per day 2
Bookings 1
Total 2

Feedback To do
 In progress
 Complete
 More time required
 Stalled

Created by Mike Pender 21/03/2018 at 5:18pm

Notes
Estimate details
Attachments

Requisition

ID 7796 From Mike Pender
Due by 14/03/2018 at 8 Completed
Hours requested 2
Subject Artwork required
Details see attached spec

➔ Open requisition Delete Cancel Save

Calendar bookings tab

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

My calendar Calendar bookings Artwork required

Activity: Artwork required (7796)

Details History Attachments **Calendar bookings**

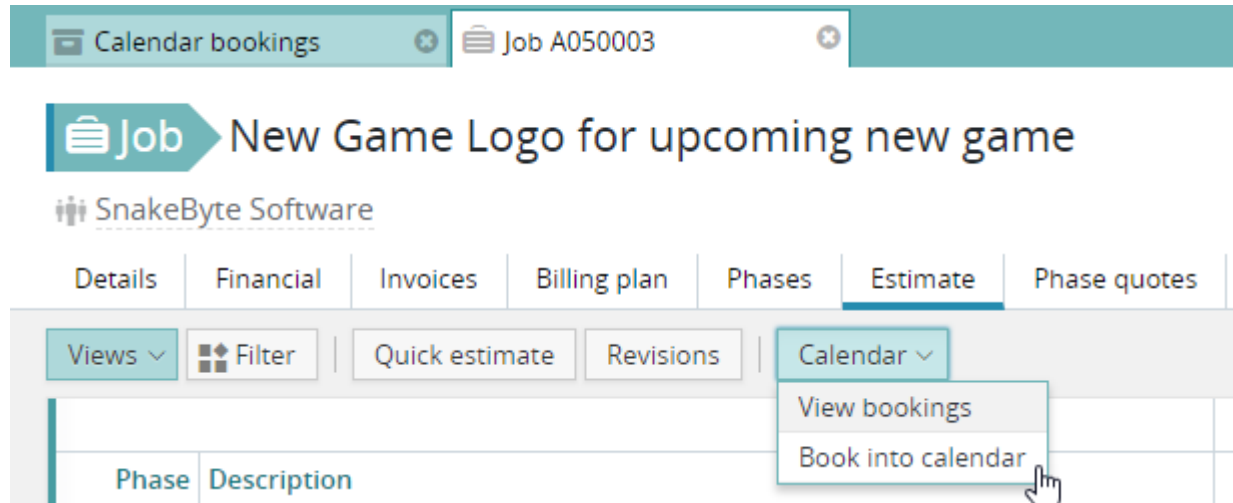
Resource	Start date	Hours booked	Start time	End time
Mike Pender	21/03/2018	2	13:00:00	15:00:00
Helen Whitley	14/03/2018	2	10:00:00	12:00:00
Rob Simon	14/03/2018	2	09:00:00	11:00:00
TOTAL		6		

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.




The screenshot displays the software interface for 'Calendar bookings' for 'Job A050003'. The main header shows 'Job New Game Logo for upcoming new game' and 'SnakeByte Software'. Below this, there are tabs for 'Details', 'Financial', 'Invoices', 'Billing plan', 'Phases', 'Estimate', and 'Phase quotes'. The 'Estimate' tab is currently selected. A toolbar contains buttons for 'Views', 'Filter', 'Quick estimate', 'Revisions', and 'Calendar'. A dropdown menu is open over the 'Calendar' button, showing two options: 'View bookings' and 'Book into calendar'. Below the toolbar, a table with columns 'Phase' and 'Description' is visible.




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 bookings












Calendar bookings

Weekly **Daily**  < > 4 weeks ▾ Mar 13 - Apr 9, 2018

Person	Week 11																	
	Tue - Mar 13							Wed - Mar 14										
	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm
 Matthew Tanner																		
 Mike Pender	Top Store - 1600033.001 - 5 hours							SnakeByte Soft	Ace Electronics	Royal Caribbean International		SnakeByte Software - AD50003.001						
 Rob Simon																		

↑↓

Get job estimates  Get requisitions 

	Client	Job phase	Description	Charge code	Due date	Estimated	Booked
	Ace Electronics	16/1600004.004	Graphics for New Hunter game/Maintenan...	1/tesd	Tu 22/05/2012	2	2
	Acme company	16/1600025.001	ITV Ad - concept	Account handl	Mo 05/03/2012	0	0
	Acme company	16/1600025.001	ITV Ad - concept	Junior Mac Wo	Mo 05/03/2012	0	2
	Internal	16/1600029.001	Out of office	Out of office	Tu 14/06/2016	8	3
	Royal Caribbean International	16/1600030.001	Game - Supersonic	Planning	We 21/08/2013	3	3.5
	Ace Electronics	16/1600032.001	TV Campaign - laptops	Design	Tu 01/05/2012 ...	2	0
	Ace Electronics	16/1600032.002	TV Campaign - laptops/Production	Planning	Sa 31/03/2012	1.5	0
	Top Store	16/1600033.001	London Exhibit	Planning	Th 25/04/2013	7.5	5
	Top Store	16/1600033.001	London Exhibit	1/tesd	Th 25/04/2013	2	0
	Top Store	16/1600033.003	London Exhibit/Concept	1/tesd	We 14/03/2012	1.5	3
	SnakeByte Software	16/1600002.001	New Game Logo for upcoming new game	Senior Design	Fr 30/06/2012	1	4

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

Wed - Mar 14								
9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm
SnakeByte Soft	Ace Electronics				Royal Carribean Internationa			
Options								
✎ Edit								
📄 Copy								
✕ Delete								
✓ Revert to draft								
Open								
📁 Job: 16/A050003								
📄 Phase: 16/A050003.001								
📄 Estimate: Planning								
Filter calendar								
👤 Client: SnakeByte Software								
📁 Job: 16/A050003								
📄 Phase: 16/A050003.001								
🔄 Reset filter								
						Requested by		
						Mike Pender		
						Mike Pender		

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.

The screenshot shows a web interface for a calendar booking. The main window is titled 'Calendar booking: Acme company' and contains a sub-window for '1600025 ITV Ad - concept'. The user is identified as 'Helen Whitley'. The interface is divided into several sections:

- Booking details:** Includes fields for Phase (001 - ITV Ad - concept), Charge code (Junior Mac Work), and Tentative status. It also shows dates (14/03/2018), times (10:00:00 to 12:00:00), and hours per day (2). A feedback section is visible with options: To do, In progress, Complete, More time required, and Stalled.
- Requisition:** Shows ID 7796, From Mike Pender, Due by 14/03/2018 at 8:00am, Hours requested 2, Subject Artwork required, and Details see attached spec.
- Attachments:** A table listing attachments with columns for Attachment name, Created, and By.

Attachment name	Created	By
Amends	14/03/2018	MP
Artwork brief	14/03/2018	MP

At the bottom right, there are buttons for 'Open requisition', 'Cancel', and 'Save'. A tooltip for the 'Open requisition' button is also visible.

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.

The screenshot shows a 'List preferences' button with a gear icon. Below it is a checkbox for 'Display hidden estimates' which is checked. At the bottom, there are filter buttons for 'Staff team', 'Status', and 'Priority'.

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.

Person	Week 12																
	Wed - Mar 21							Thu - Mar 22									
	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	9am	10am	11am	12pm	1pm	2pm	3pm	4pm
Matthew Tanner																	
Mike Pender	Acme company - 160025.001 - 4			Acme company		Top Store - 160033.001 - 2 day, 2 hours per day											

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.

The screenshot displays the 'My calendar' interface. The main calendar grid shows a week from Monday, March 19, to Sunday, March 25, 2018. A booking for 'Acme company' is highlighted in blue on Wednesday, March 21, from 09:00 to 13:00. A tooltip provides details for this booking: Client: Acme company, Job phase: 16/1600025.001, Job desc: ITV Ad - concept, Charge code: Account handler, Staff: Mike Pender, Handler: Arthur Spring, Start time: 9:00 AM, End time: 1:00 PM, All days: No, Duration: 4 hours. To the right, the 'Calendar booking' panel shows the booking details for 'Acme company', including job phase, job description, charge code, staff, handler, and start/end times. It also displays the status (In progress), feedback options (To do, In progress, Complete, More time required, Stalled), and booking duration (4 hours). The panel includes buttons for 'Quick timesheet' and 'Full timesheet', and sections for 'Notes', 'Requisition', and 'Attachments'. At the bottom, a 'Timers' section shows a timer for 'Acme company' on 21/03/2018 for job phase 16/1600025.001, with the task 'Creative Thinking'.

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 to see.

- Status
- Notes
- Requisitions
- Attachments

Calendar booking

Acme company

16/1600025 ITV Ad - concept

001 ITV Ad - concept

Mike Pender: Creative Thinking

Status

Handler Arthur Spring

Colour ▼

Feedback To do

In progress

Complete

More time required

Stalled

Booked 1:00 PM - 3:00 ... 2 hours

Time entered 0 hrs

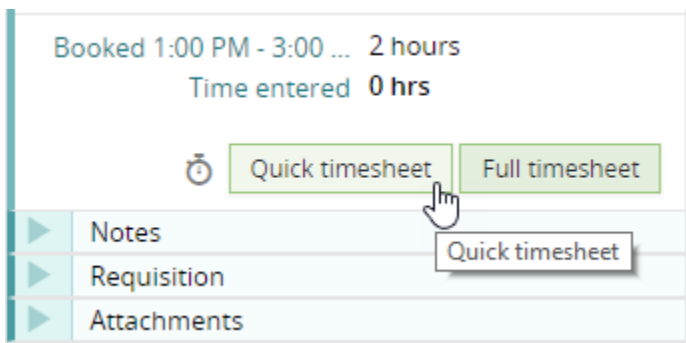
Notes

Requisition

Attachments

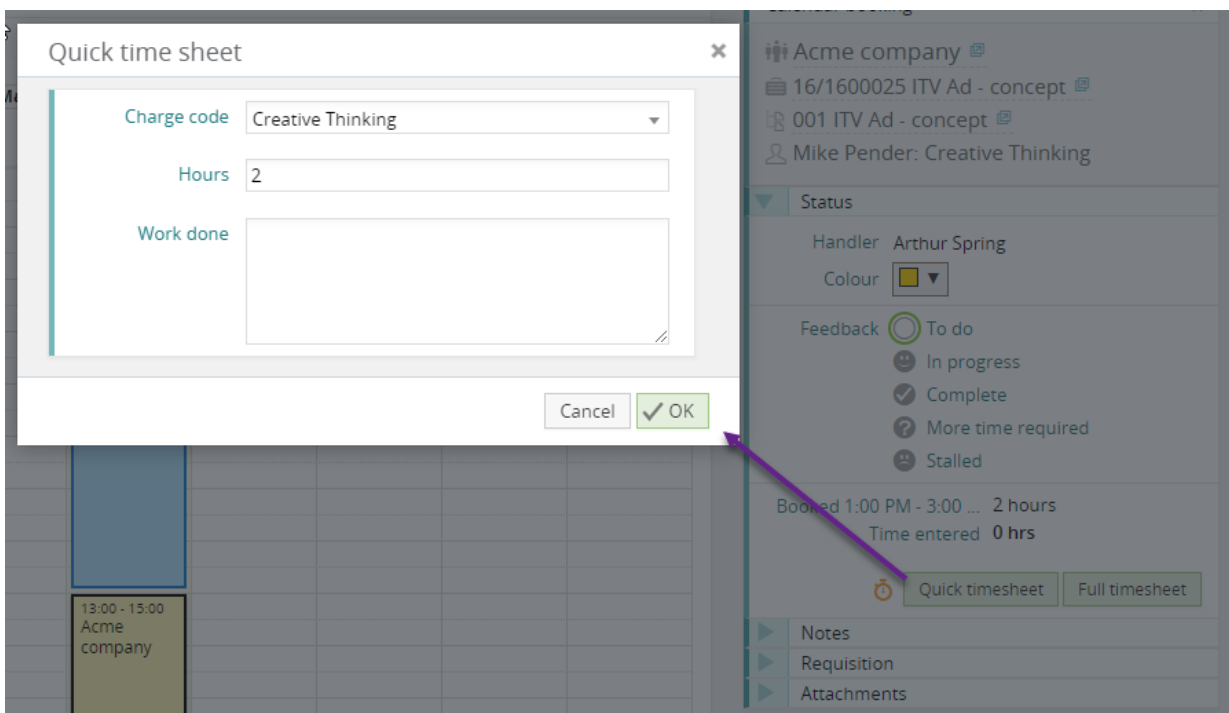
Status section - timesheets

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.

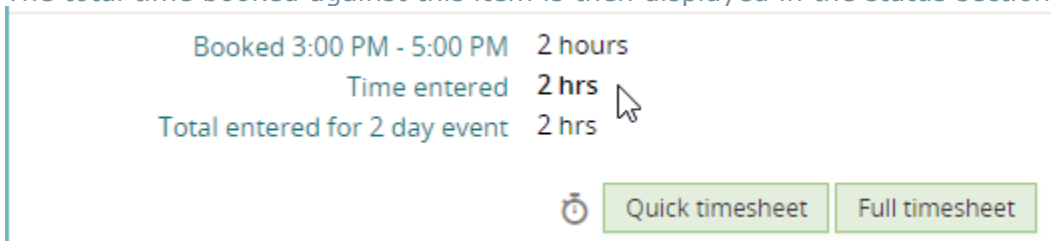


Quick timesheet

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.



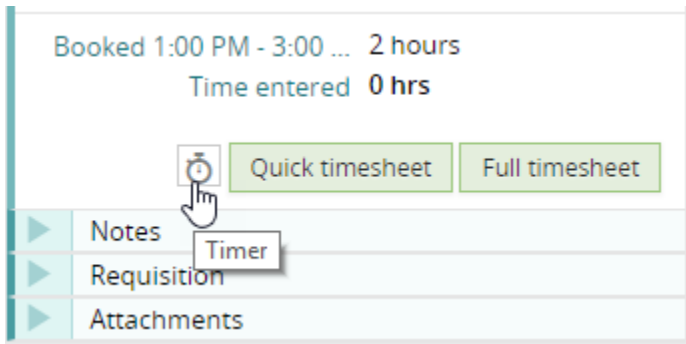
The total time booked against this item is then displayed in the status section.



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.

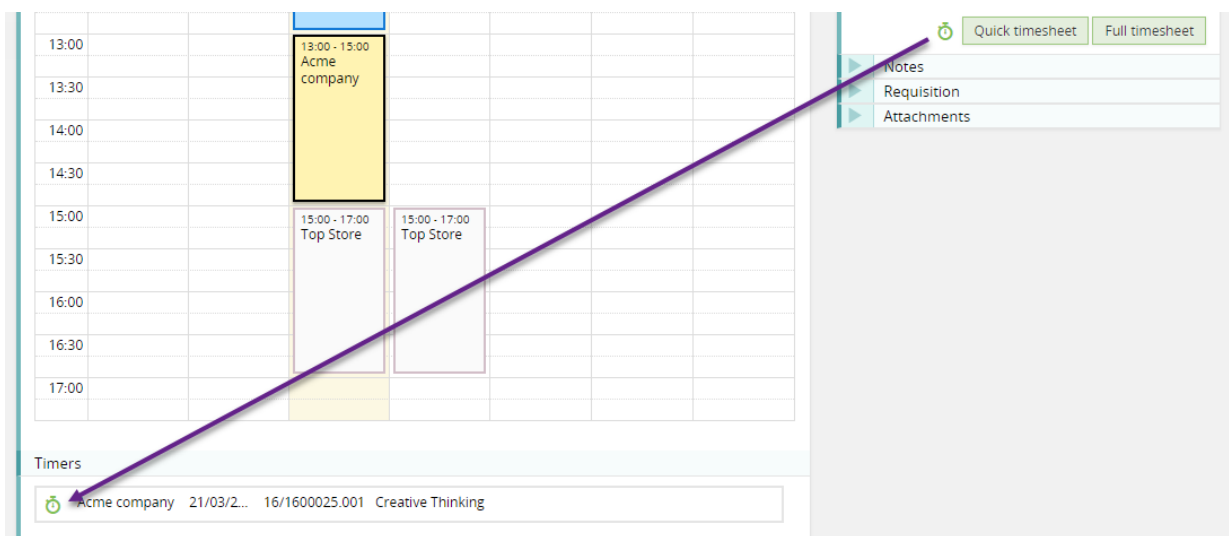
Timer

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

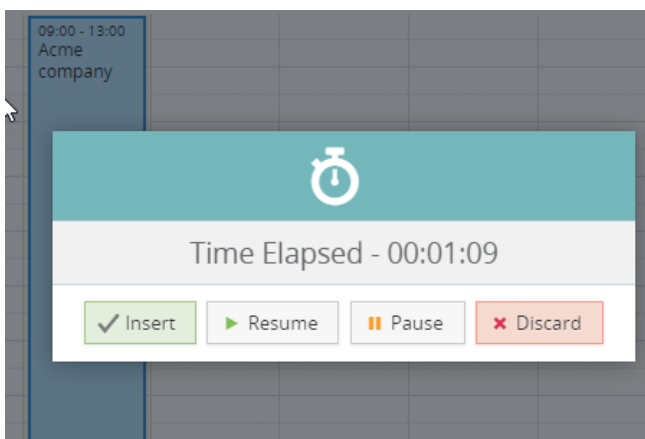
You can have several timers running at the same time. Typically, you would pause one and start another. The running timers are displayed at the bottom of the calendar.



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.

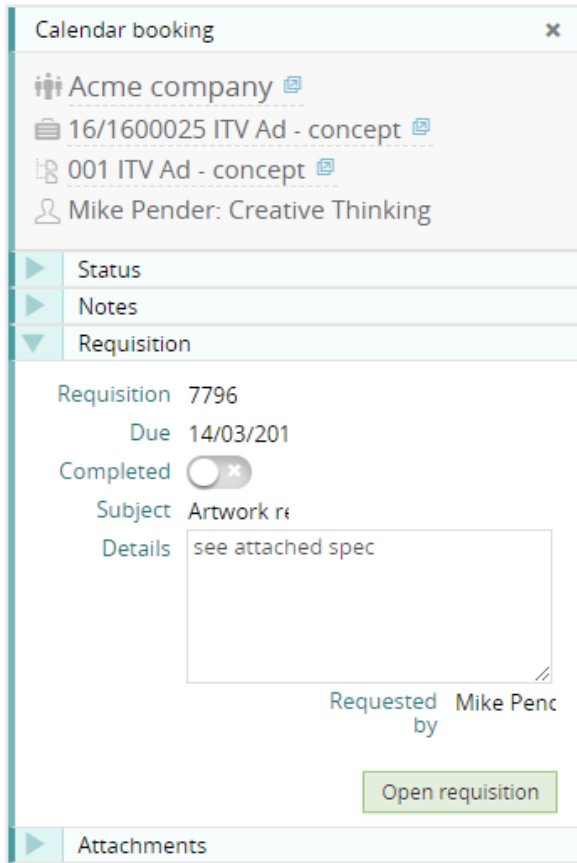
You then get the options shown below. If you choose to insert the elapsed time, this will open up 'Quick time sheet' with the hours already entered.



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.



The screenshot shows a 'Calendar booking' window with the following details:

- Company: Acme company
- Booking: 16/1600025 ITV Ad - concept
- Item: 001 ITV Ad - concept
- Account handler: Mike Pender: Creative Thinking

The 'Requisition' section is expanded, showing:

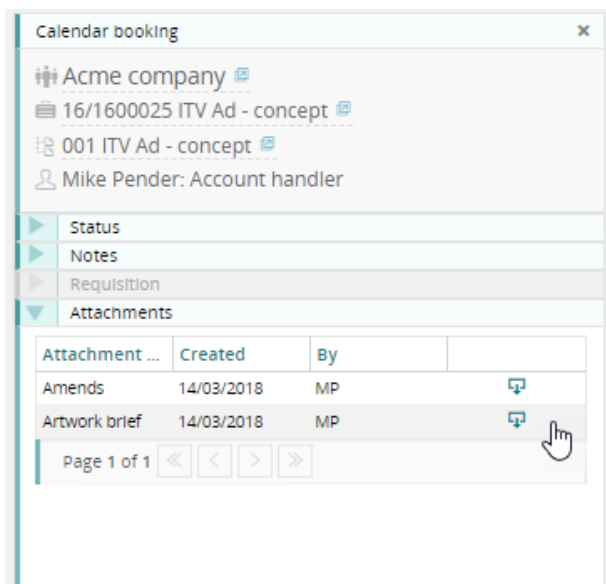
- Requisition: 7796
- Due: 14/03/2018
- Completed:
- Subject: Artwork re
- Details: see attached spec
- Requested by: Mike Pender

An 'Open requisition' button is visible at the bottom of the requisition section.

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.



The screenshot shows the 'Calendar booking' window with the 'Attachments' section expanded. The attachments are listed in a table:

Attachment ...	Created	By	
Amends	14/03/2018	MP	
Artwork brief	14/03/2018	MP	

Below the table, there is a 'Page 1 of 1' indicator and navigation arrows. A hand cursor is pointing at the download icon for the 'Artwork brief' attachment.

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.

Calendar booking

Acme company

16/1600025 ITV Ad - concept

001 ITV Ad - concept

Mike Pender: Account handler

Status

Handler Arthur Spring

Colour [blue]

Feedback

- To do
- In progress
- Complete
- More time required
- Stalled

Booked 9:00 AM - 1:00 PM 4 hours

Time entered 4 hrs

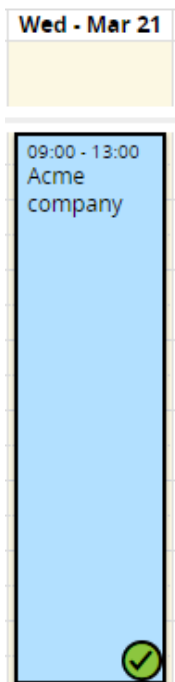
Quick timesheet Full timesheet

Notes

Requisition

Attachments

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

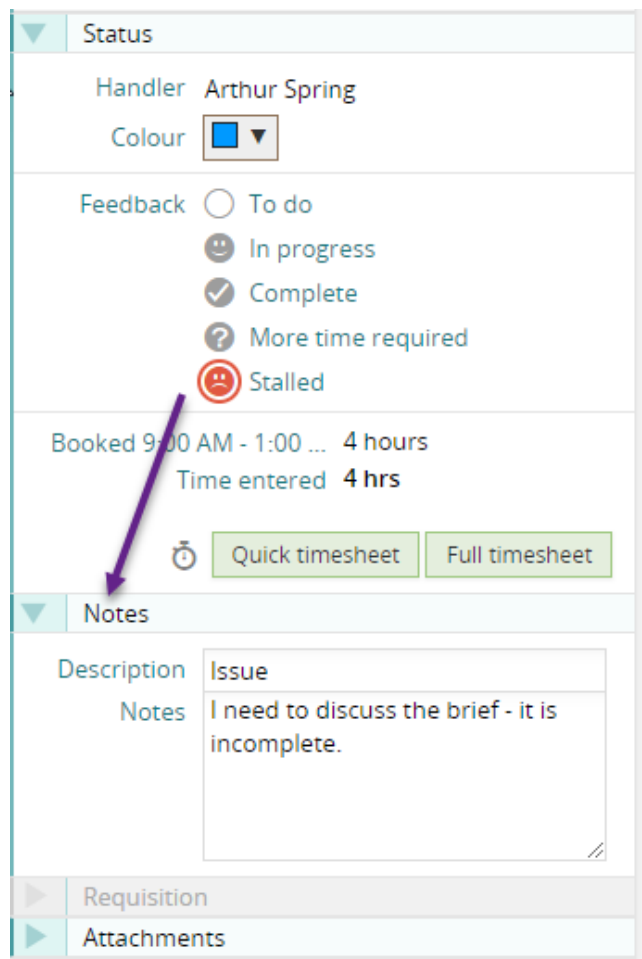


If the staff resource has run into a problem and can no longer proceed with this booking, he/she would need to inform the traffic manager of the situation. This feedback status indicates there is a problem and will also automatically send an email alert to the creator of the booking.

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.



The screenshot shows a software interface for managing bookings. The 'Status' section is expanded, showing a dropdown menu with options: 'To do', 'In progress', 'Complete', 'More time required', and 'Stalled'. The 'Stalled' option is selected, indicated by a red sad face icon. Below the status dropdown, the booking details are shown: 'Booked 9:00 AM - 1:00 ... 4 hours' and 'Time entered 4 hrs'. There are two buttons: 'Quick timesheet' and 'Full timesheet'. Below the status section is the 'Notes' section, which is also expanded. It shows a 'Description' field with the text 'Issue' and a 'Notes' field with the text 'I need to discuss the brief - it is incomplete.' Below the notes section are 'Requisition' and 'Attachments' sections.

Email alert

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

Reply Reply All Forward




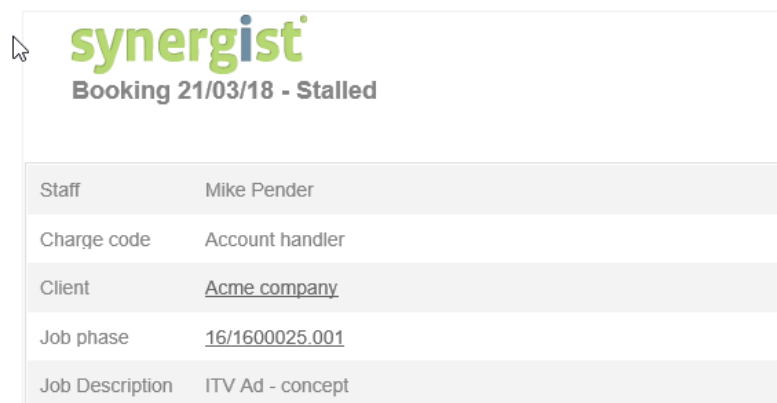
Wed 3/21/2018 6:13 PM

Synergist Alerts

Synergist Alert! - Booking for 21/03/18 - Stalled

To Mike Palmer

 If there are problems with how this message is displayed, click here to view it in a web browser.



The screenshot shows an email alert from Synergist. The header includes the Synergist logo and the subject 'Booking 21/03/18 - Stalled'. Below the header is a table with booking details:

Staff	Mike Pender
Charge code	Account handler
Client	<u>Acme company</u>
Job phase	<u>16/1600025.001</u>
Job Description	ITV Ad - concept

Feedback visibility

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

MyCalendar

The screenshot shows the 'MyCalendar' interface for the week of March 19-25, 2018. A calendar grid displays two bookings for 'Acme company' on Wednesday, March 21st: a blue booking from 09:00 to 13:00 and a yellow booking from 13:00 to 15:00. A green smiley face feedback icon is visible at the bottom of the blue booking. A purple arrow points from this icon to the 'Feedback' section of the 'Calendar booking' detail pane on the right. The detail pane shows the booking title 'Acme company', handler 'Arthur Spring', and a 'Feedback' dropdown menu with 'In progress' selected. Other options include 'To do', 'Complete', 'More time required', and 'Stalled'. The booking is for 4 hours, booked from 9:00 AM to 1:00 PM, with 0 hours of time entered.

Calendar bookings

The screenshot shows the 'Calendar bookings' interface for the week of March 19-25, 2018. The view is set to 'Daily' and 'Booking view'. The calendar grid shows bookings for two people: Matthew Tanner and Mike Pender. On Wednesday, March 21st, there are three bookings: a blue booking for 'Acme company - 1600025.001' with a green smiley face feedback icon, a yellow booking for 'Acme company', and a purple booking for 'Top Store - 1600033.001 - 2'. A purple arrow points from the smiley face icon in the blue booking to the 'Feedback' section of the 'Calendar booking' detail pane in the previous screenshot.

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.

Job Website update JOB au00023

Ace Electronics Print Export Job Actions Cancel Save & Close

Details Financial Invoices Billing plan Phases **Estimate** Phase quotes Pending Activities Attachments Schedule Special Contacts

Views Filter Quick estimate Revisions Calendar Actual to estimated cost

Stage Filter GB Pounds **Euros**

Phase	Description	Units		Cost		Charge		Profit		Staff	P	Q	Opt
		Estimated	Actual	Estimated	Actual	Estimated	Actual	Estimated	Actual				
001	Website update												
	Web site design												
	- Planning	5.00				€431.25		375.00					
	Coding												

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.

Purchase Estimate: {EST} Print Cancel Save & Close

13th Beach Golf Resort (Base) 1/00010817.001 SPV-3412- test 2

Convert to Real

Supplier: A3 Holding BV 1/A3H
 Contact: -Blank-
 Their ref:

Details Text **Lines** Delivery Notes Tender Attachments

Description	Quantity	Unit Cost	Cost Total	% Mk	Charge Out	Style	Picked
Estimate Line 1	1	71.4286	71.43	0.00	71.43	B i U	☑
Additional notes against and estimate line.		USD 100.00	100.00				
Estimate Line 2	2	142.8571	285.71	0.00	285.71	B i U	☑
		USD 200.00	400.00				
Totals			357.14	0.00	357.14		
		USD	500.00				

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.

The screenshot shows the 'Phase 2 page quote' interface. At the top, there are navigation tabs: Details, Financial, Invoices, Billing plan, Time, Materials, Purch & exp., Estimate (selected), Quote, Pending, Activities, Attachments, Schedule, and Contacts. Below these are buttons for Print, Export, Phase Actions, Cancel, and Save & Close. The main table has columns for Description, Units (Estimated, Actual), Cost (Estimated, Actual), Charge (Estimated, Actual), Profit (Estimated), Staff, P, Q, and Opt. The table lists various tasks such as Administration, Artwork, Copy Writing, Creative Design, Design, Employee Training, MAC Work, New Business 2, Pitch Work, Powerpoint Designer, PR work, Days, Amends New, Purchases, and Freelancers. A 'Totals' row at the bottom shows a Gross Estimated Profit of 2735.00 (100%).

Description	Units		Cost		Charge		Profit	Staff	P	Q	Opt
	Estimated	Actual	Estimated	Actual	Estimated	Actual	Estimated				
Phase 2 page quote											
- Administration	1.00		9.00				-9.00				
- Artwork	1.00		20.00		£40.00		20.00				
- Copy Writing	1.00		20.00		£70.00		50.00				
- Creative Design	1.00		15.00		£100.00		85.00				
- Design	1.00		15.00		£60.00		45.00				
- Employee Training	1.00		15.00				-15.00				
- MAC Work	1.00		20.00		£50.00		30.00				
- New Business 2	1.00		10.00				-10.00				
- Pitch Work	1.00		10.00		£30.00		20.00				
- Powerpoint Designer	1.00		15.00		£30.00		15.00	1/DP			
- PR work	1.00		15.00		£25.00		10.00				
- Days	23.00				£2300.00		2300.00				
- Amends New	1.00		20.00		£30.00		10.00				
Purchases											
Freelancers											
Totals	35.00	0.00	184.00	0.00	£2735.00		2551.00	(93%)			
Gross Estimated Profit							2735.00	(100%)			

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

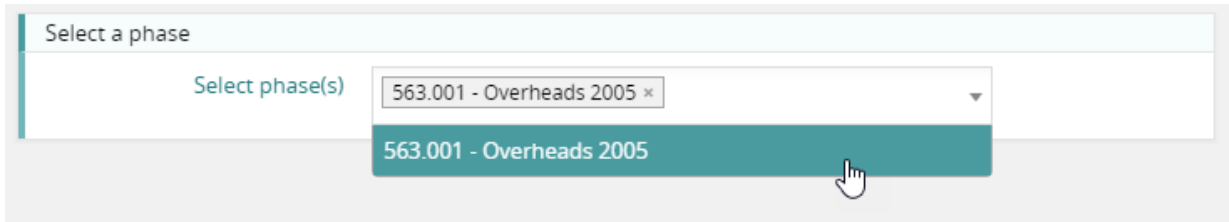
Jobs & phases

Transfer cost utility

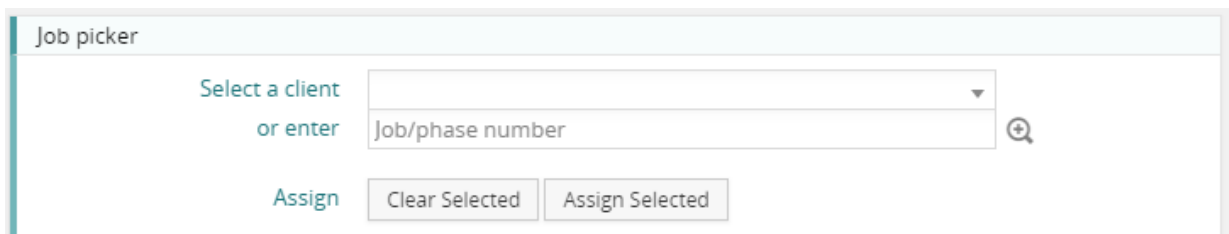
New transfer cost utility

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

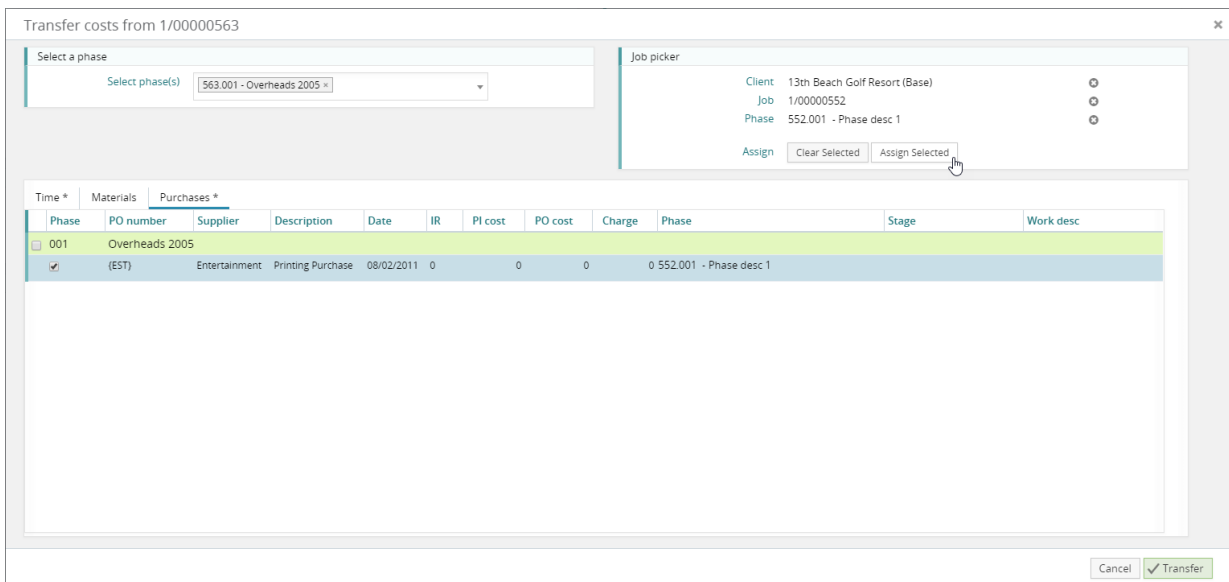
From within the utility you can select the phases you wish to select costs from,



.. 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.



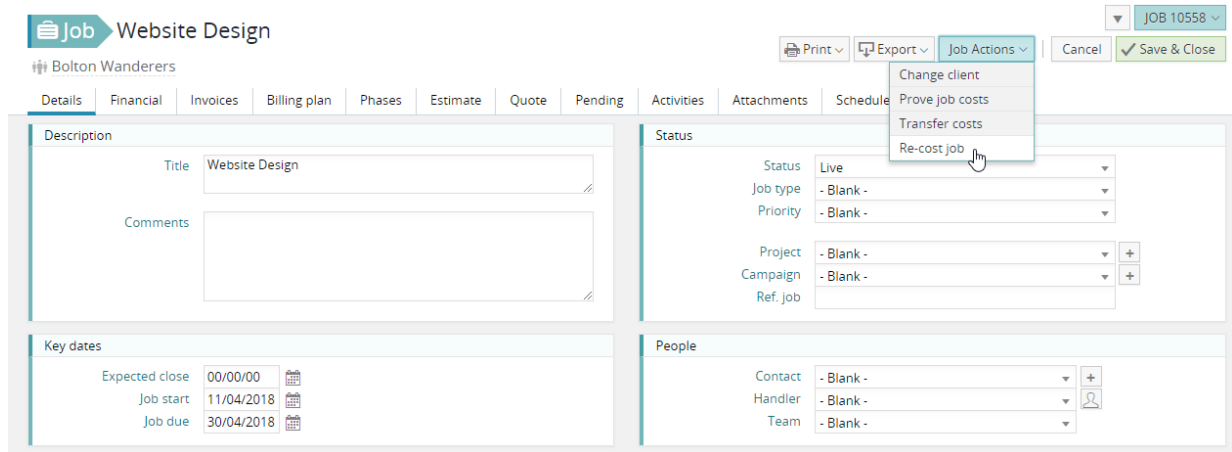
To choose a different phase or stage to assign the cost to, simply click on the 'x' next to the client, job or phase.

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

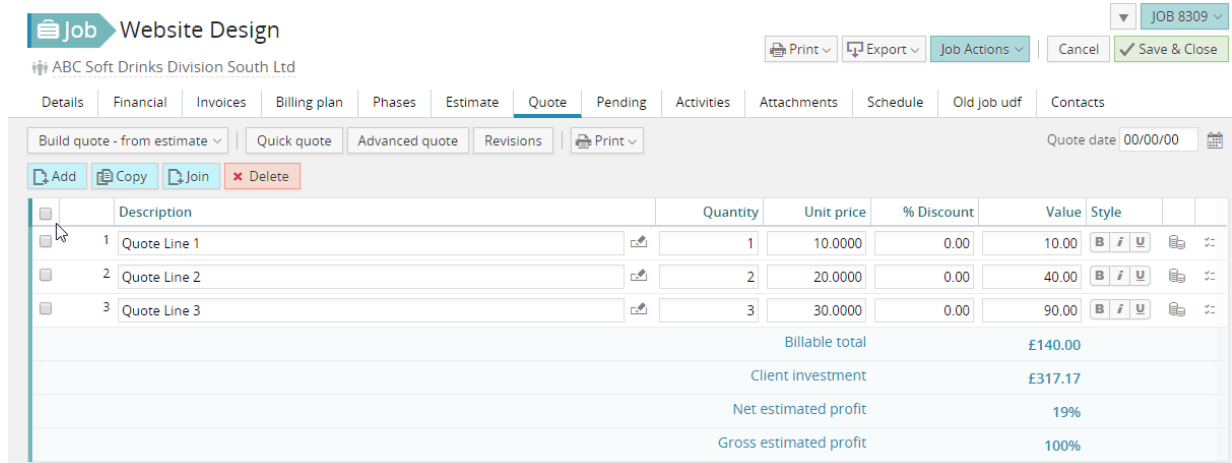
We have now added the re-cost job utility to the Job Actions button on the job card; previously this was only available from within the batch update area on the job and phase lists.



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.

The screenshot shows a dialog box titled "Phase monthly create options" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Select phase types" and "Options".

Select phase types: This section contains a list of months with checkboxes next to them. A mouse cursor is hovering over the "Select all" checkbox, which is currently unchecked. The list includes: Select all, January, February, March, April, May, June, July, August, September, October, November, and December.

Options: This section contains several configuration options:

- Start month:** A dropdown menu.
- Select start:** Three radio buttons: "Last year", "This year" (which is selected), and "Next year".
- Select start month to initial phase:** An unchecked checkbox.
- Number of years to create:** A text input field containing the number "1".

At the bottom right of the dialog, there are two buttons: "Cancel" and "Create" (with a checkmark icon).

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.

Stage: Web site design





 Ace Electronics  16/au00023 Website update  001 Website update

Details | Activities

Description

Stage	Web site design
Description	Web site design
Comment	

Status

Key stage	<input type="checkbox"/>
Inactive	<input type="checkbox"/>
% Complete	0
Milestone	<input type="checkbox"/>
Start date	01/03/2013 
End date	17/03/2013 
Completed	<input checked="" type="checkbox"/> Completed Date 13/03/2013 
Duration	11
Estimates/Costs	Exclude 
Assigned to	<input type="text"/>

Include

Exclude

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.

The screenshot displays a software interface for a 'Phase Artwork phase' card. At the top, there are navigation buttons (back, forward, refresh) and a dropdown menu showing 'PHASE 10558.A01'. Below this is a toolbar with 'Print', 'Export', 'Phase Actions', 'Cancel', and 'Save & Close'. The 'Phase Actions' menu is open, showing 'Transfer costs' and 'Re-cost job'. The card itself is divided into several sections: 'Description' (Title: Artwork phase, Comments: Initial artwork phase for client), 'Value' (Quoted: 0.00, Order no: 2232323, VAT: 20 (20%), Bill by: Quote/Estimate), 'Key dates' (Start: 14/02/2018, Due: 18/04/2018), 'Status' (Status: Live, Stage: Proofing, Phase type: Artwork, Priority: 1, Display order: 1, Project: Blue Gate Software, Campaign: - Blank -), and 'People' (Contact: Owen Coyle, Handler: Kevin Davis, Phase owner: Rob Smith). The card is created by Rob Smith on 14/04/2015 at 4:01 pm.

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

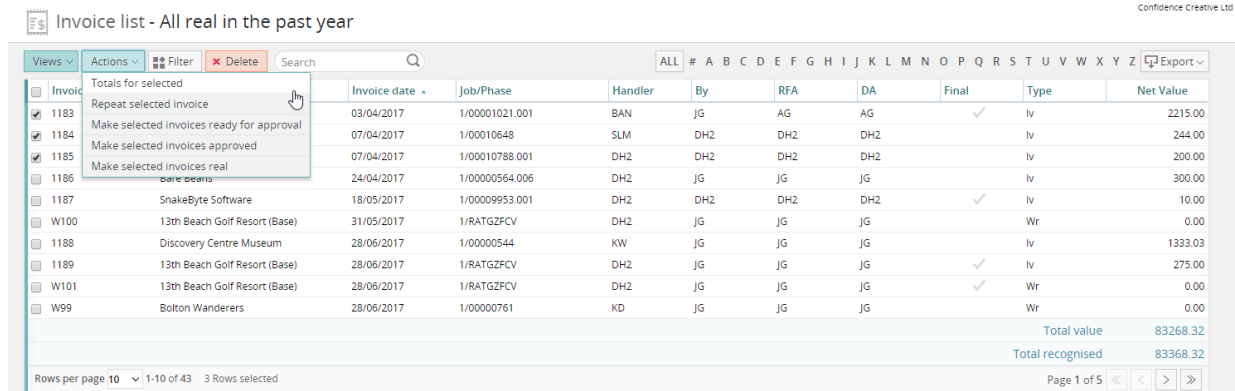
The re-cost job action is now available from the phase card and works in same way as the re-cost job action on the job card.

Invoicing

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.



Invoice list - All real in the past year

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

Totals for selected

- Repeat selected invoice
- Make selected invoices ready for approval
- Make selected invoices approved
- Make selected invoices real

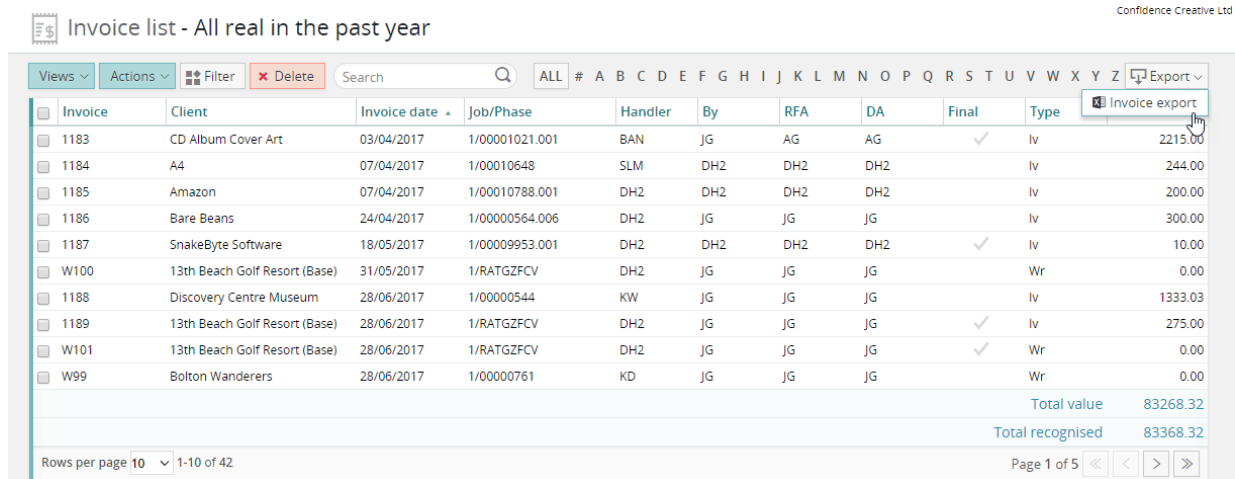
Invoice	Client	Invoice date	Job/Phase	Handler	By	RFA	DA	Final	Type	Net Value
1183	CD Album Cover Art	03/04/2017	1/00001021.001	BAN	JG	AG	AG	✓	lv	2215.00
1184	A4	07/04/2017	1/00010648	SLM	DH2	DH2	DH2		lv	244.00
1185	Amazon	07/04/2017	1/00010788.001	DH2	DH2	DH2	DH2		lv	200.00
1186	Bare Beans	24/04/2017	1/00000564.006	DH2	JG	JG	JG		lv	300.00
1187	SnakeByte Software	18/05/2017	1/00009953.001	DH2	DH2	DH2	DH2	✓	lv	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		lv	1333.03
1189	13th Beach Golf Resort (Base)	28/06/2017	1/RATGZFCV	DH2	JG	JG	JG	✓	lv	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

Rows per page 10 1-10 of 43 3 Rows selected Page 1 of 5

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 list - All real in the past year

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

Invoice export

Invoice	Client	Invoice date	Job/Phase	Handler	By	RFA	DA	Final	Type	Net Value
1183	CD Album Cover Art	03/04/2017	1/00001021.001	BAN	JG	AG	AG	✓	lv	2215.00
1184	A4	07/04/2017	1/00010648	SLM	DH2	DH2	DH2		lv	244.00
1185	Amazon	07/04/2017	1/00010788.001	DH2	DH2	DH2	DH2		lv	200.00
1186	Bare Beans	24/04/2017	1/00000564.006	DH2	JG	JG	JG		lv	300.00
1187	SnakeByte Software	18/05/2017	1/00009953.001	DH2	DH2	DH2	DH2	✓	lv	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		lv	1333.03
1189	13th Beach Golf Resort (Base)	28/06/2017	1/RATGZFCV	DH2	JG	JG	JG	✓	lv	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

Rows per page 10 1-10 of 42 Page 1 of 5

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.

Job PO, PI and data viewer

Print Export Job Actions Cancel Save & Close

FRDC

Details Financial **Invoices** Billing plan Phases Estimate Quote Pending Activities Attachments Schedule Contacts

New Delete Roll up invoices Net to invoice 9365.00

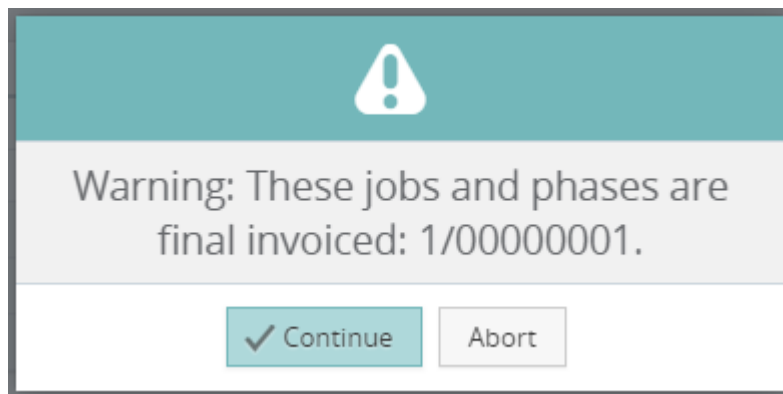
Number	Date	Amount	Recognised	Type	Bill-to
10061	01/04/2011	300.00	300.00	lv	Repeat
10060	01/04/2011	335.00	335.00	lv	Repeat
Real Totals	2	635.00	635.00		
Draft Totals	0	0.00	0.00		
TOTALS	2	635.00	635.00		

Rows per page 10 1-2 of 2 Page 1 of 1

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.

Draft invoice: D10377 Print Make Real Cancel Save & Close

Ward Homes 1/00000469.002 To design, produce copy, artwork and print

Type: Invoice
Final:
Inv date: 28/09/2011
Order number: 1234oo9

Ready for approval:
Created by: SYN David Stevenson on 28/09/2011

Details | Content | Jobs/Phases invoiced | Allocated costs | Address | Financial | Accounts analysis | Notes | Phase allocations

Description	Quantity	Unit price	Net total	VAT	VAT amount	Gross total	Style	
MAC Work Detailed notes on quote line.	6	50.0000	300.00	1 (UK 20% - OU...)	52.50	352.50	B i U	x
<i>Java Development</i>	2	300.0000	600.00	1 (UK 20% - OU...)	105.00	705.00	B i U	x
Artwork	1	70.0000	70.00	1 (UK 20% - OU...)	12.25	82.25	B i U	x
Totals			970.00		169.75	1139.75		

Reporting

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.

The screenshot shows a configuration panel for a data viewer tool. At the top left, there is a 'Views' dropdown menu. Below it, the 'Data-type to report on' is set to 'Activities'. The 'Date to use' dropdown menu is open, showing options: 'Created date', 'Created date', 'Modified date' (which is highlighted in blue and has a mouse cursor over it), 'Due date', and 'Completed date'. The 'Dates & period' section is partially visible at the bottom.

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	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			
Grand total				1,000.00	400.00	600.00	60.00	360.00	240	24.00			

Cost & quotes report

Export version

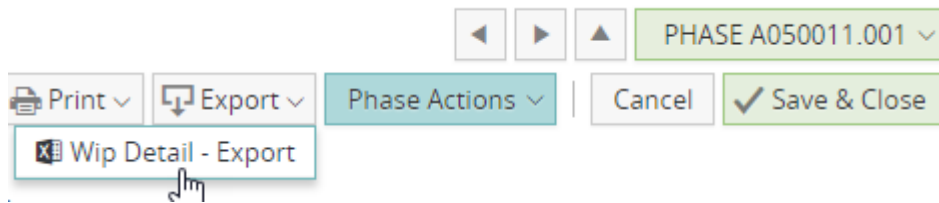
Variance added to the export version of the report

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.

Only with billing plan/quote variance

synergist Billing plans summary report 23/03/18 13:56:27 1

From 31/12/17
To 31/07/18

Ace Electronics

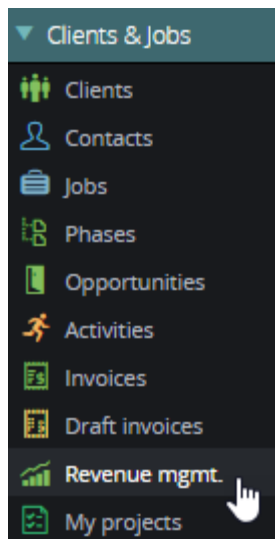
Client	Job	Description	Handler	Quoted	Planned	Variance	%Planned
Ace Electronics	16/1600004	Graphics for New Hunter game	Jenna Quinn	6,020.00	3,309.10	2,710.90	55
Ace Electronics	16/au00023	Website update	Rob Shearer	0.00	0.00	0.00	0
Client sub-total				6,020.00	3,309.10	2,710.90	
				Total Quoted	Total Planned	Total Quoted	
Grand total				6,020.00	3,309.10	2,710.90	

Revenue Management

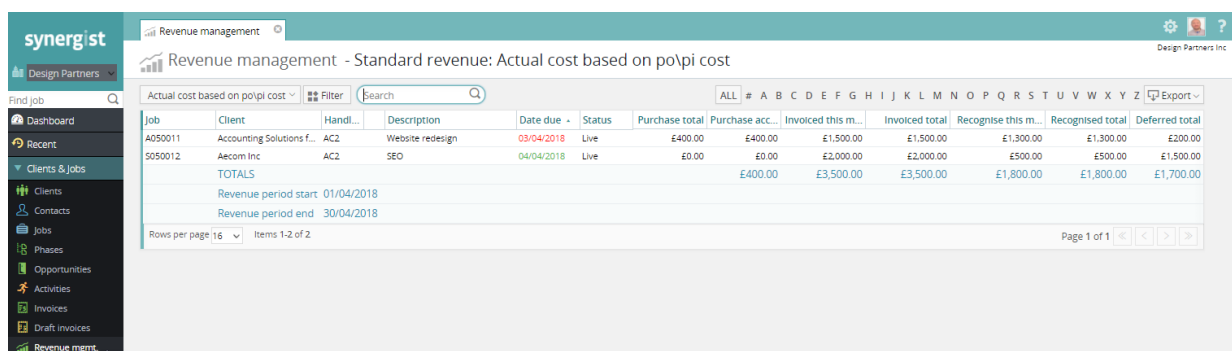
Revenue management screen

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.

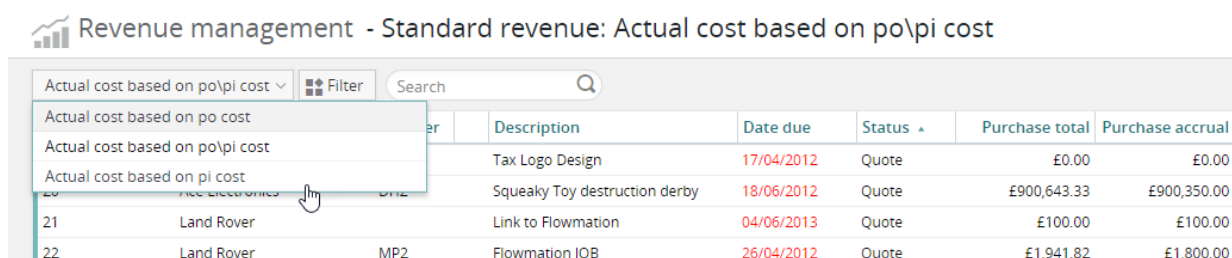


The list of jobs displayed in revenue management are all jobs which are not final invoiced up to the end of the current revenue period, plus all jobs which have been final invoiced in the current revenue period. Clicking one of the items in the list will open up the job in question in a separate tab.



Costs

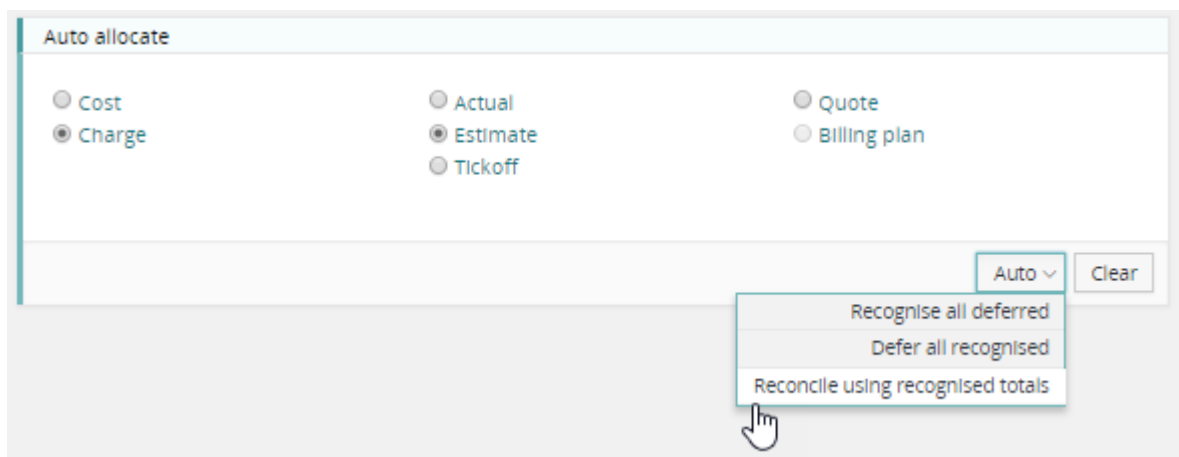
The user has the ability to base the actual cost on either purchase orders, purchase invoices or a hybrid of both by selecting the view from the button in the top left hand corner.



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.

Suppliers & Purchasing

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

Supplier: Hammer & Co Map Print Cancel Save & Close

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

Views New Delete


Attachment name	Created	By	Folder/Activity	
<input type="checkbox"/> Billing plan report (1).pdf	04/04/2018	Mike Pender	Document Folder	Download

Rows per page 16 1-1 of 1 Page 1 of 1 << < > >>

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.

Purchase invoice: 16/1600016

PIR number 16/1600016
Supplier Jenna Quinn 
Their ref

Invoice Credit Write off

Details | Analysis | Notes | **Attachments**

Value	
Gross	50.00
VAT	6.52
Net	£43.48
Allocated	£43.48
Unallocated	£0.00

Scan of the purchase invoice attached



Purchase invoice: 16/1600016

Actions ▾

Cancel

Save & Close

PIR number 16/1600016

Supplier Jenna Quinn

Their ref

Invoice Credit Write off

Details Analysis Notes Attachments

Views ▾

New

Delete

Attachment name	Created	By	Folder/Activity	
<input type="checkbox"/> Image of invoice	04/04/2018	Mike Pender	Document Folder	Download

Rows per page 10 1-1 of 1 Page 1 of 1

New supplier company registration field

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



Supplier: Able Printers Limited

Map

Print ▾

Cancel

Save & Close

Details Supply types Contacts Financial/Notes Orders Purchase invoices Prices Attachments

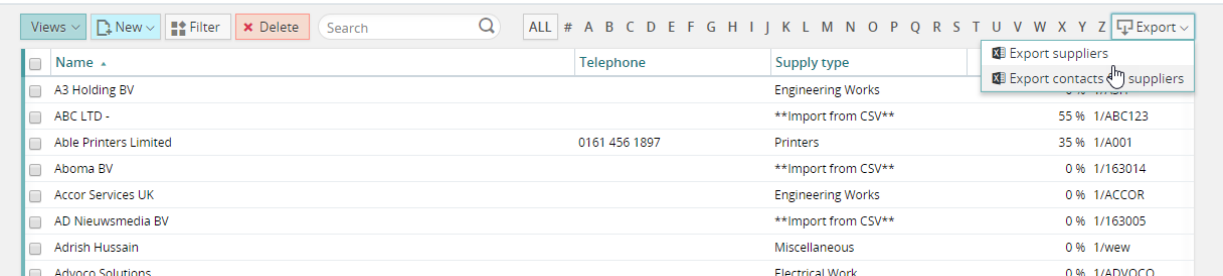
Main details	Options
Supply type Printers	<input type="checkbox"/> Generic
Code 1/A001	<input type="checkbox"/> Expense
Name Able Printers Limited	<input type="checkbox"/> Prospect
	<input type="checkbox"/> Inactive
	<input type="checkbox"/> On stop
Info	Address
Company reg. number 123456789	Address 22 High Street
Main email info@ableprinterslimited.co.uk	Chester
Web URL	Town Cheshire
Phone 0161 456 7890	County
Fax	Postcode CH6 7TF
Inter company * No Link *	Country
Category Clinical	

Exports

Supplier and supplier contacts export

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

Supplier list - Active suppliers Confidence Creative Ltd



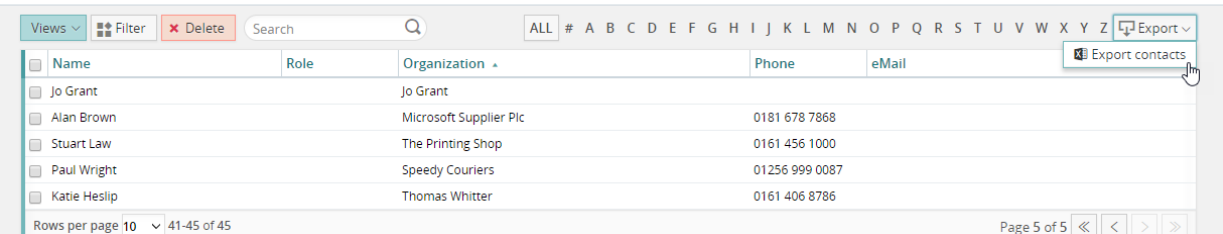
The screenshot shows a web interface for 'Supplier list - Active suppliers'. At the top, there are navigation buttons: 'Views', 'New', 'Filter', and 'Delete'. A search bar is present. Below the search bar is a table with columns: 'Name', 'Telephone', 'Supply type', and a percentage-based column. The table lists several suppliers, including 'A3 Holding BV', 'ABC LTD -', 'Able Printers Limited', 'Aboma BV', 'Accor Services UK', 'AD Nieuwsmedia BV', 'Adrish Hussain', and 'Advoco Solutions'. An 'Export' dropdown menu is open, showing options for 'Export suppliers' and 'Export contacts suppliers'. A mouse cursor is pointing at the 'Export contacts suppliers' option.

Name	Telephone	Supply type	
A3 Holding BV		Engineering Works	
ABC LTD -		**Import from CSV**	55 % 1/ABC123
Able Printers Limited	0161 456 1897	Printers	35 % 1/A001
Aboma BV		**Import from CSV**	0 % 1/163014
Accor Services UK		Engineering Works	0 % 1/ACCOR
AD Nieuwsmedia BV		**Import from CSV**	0 % 1/163005
Adrish Hussain		Miscellaneous	0 % 1/wew
Advoco Solutions		Electrical Work	0 % 1/ADVOCO

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 contact list - Active supplier contacts Confidence Creative Ltd



The screenshot shows a web interface for 'Supplier contact list - Active supplier contacts'. At the top, there are navigation buttons: 'Views', 'Filter', and 'Delete'. A search bar is present. Below the search bar is a table with columns: 'Name', 'Role', 'Organization', 'Phone', and 'eMail'. The table lists several contacts, including 'Jo Grant', 'Alan Brown', 'Stuart Law', 'Paul Wright', and 'Katie Heslip'. An 'Export contacts' button is visible in the top right corner. A mouse cursor is pointing at the 'Export contacts' button.


Name	Role	Organization	Phone	eMail
Jo Grant		Jo Grant		
Alan Brown		Microsoft Supplier Plc	0181 678 7868	
Stuart Law		The Printing Shop	0161 456 1000	
Paul Wright		Speedy Couriers	01256 999 0087	
Katie Heslip		Thomas Whitter	0161 406 8786	

Rows per page 10 41-45 of 45 Page 5 of 5

Supplier order tab

New supplier order tab

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

 **Supplier: Able Printers Limited**

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


Views ▼

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/WJH.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: Freedom Ltd**

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

Main details

Supply type: Couriers
Code: 16/F1200
Name: Freedom Ltd

Info

Company reg. number:
Main email:
Web URL:
Phone:
Fax:
Category: - Blank -

Custom fields

Notes: Main supplier

QA

Authorised
Date authorised: 03/04/2018
Number of staff: 25

Supplier category field change

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

Supplier: Able Printers Limited

Map Print Cancel Save & Close

Details Supply types Contacts Financial/Notes Orders Purchase invoices Prices Attachments

Main details

Supply type: Printers
Code: 1/A001
Name: Able Printers Limited

Options

Generic Inactive
 Expense On stop
 Prospect

Info

Company reg. number: 123456789
Main email: info@ableprinterslimited.co.uk
Web URL:
Phone: 0161 456 7890
Fax:
Inter company: * No Link *
Category:

Address

Address: 22 High Street
Chester
Town: Chester
Country: Cheshire
Postcode: CH6 7TF
Country:

Last modified on 29/03/2018 at 2:11

Blank -
Clinical
Financial
Industrial

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 list - All purchase orders

Design Partners Inc

Views Filter Delete Search Export

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

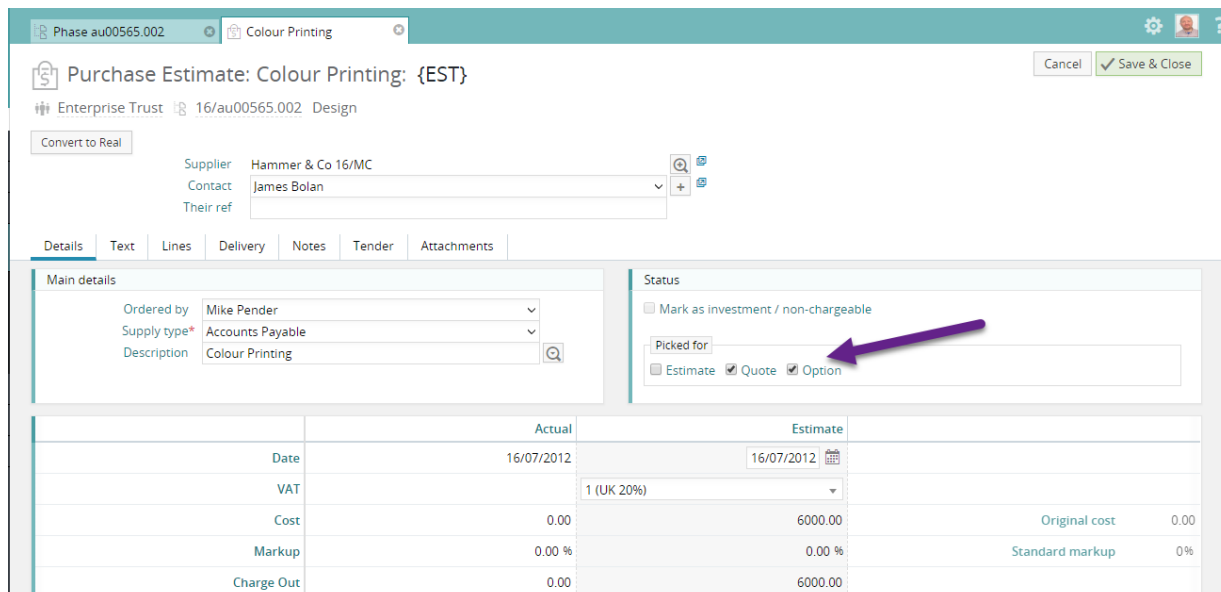
Order	Date	By	Description	Type	Supplier	Phase	Their ref	Cost
000001	30/01/12	MP	Subcontract Model Mak...	Electrical ...	Fred Smith & Co	16/16000...		£100.00
000000	30/01/12	MP	Subcontract Model Mak...	Electrical ...	Fred Smith & Co	16/16000...		£396.00
000025	14/10/13	MP	Subcontract Design Ser...	Accounts ...	Hammer & Co	16/00500...		£122.00
000024	06/08/13	MP	Subcontract Design Ser...	Electrical ...	Hammer & Co	16/M6000...		£500.00
000015	05/07/12	MP	Subcontract Design Ser...	Accounts ...	Roberto Stevens...	16/16000...		-£100.00
000012	02/07/12	MP	Colour Printing	Accounts ...	MickyD	16/16000...		£180.00
000007	19/06/12	MP	Colour Printing	Engineeri...	XYZ new Ltd	16/16000...		£5,000.00
000006	19/06/12	MP	Colour Printing	Electrical ...	Fred Smith & Co	16/16000...		£1,000.00
000023	06/08/13	MP	B&W Printing	Couriers	Freestone	16/M6000...		£200.00
000011	28/06/12	MP	B&W Printing	Electrical ...	Fred Smith & Co	16/16000...		-£100.00

Rows per page 10 Items 1-10 of 26 Page 1 of 3

Colour key: Invoice not received Expense Part invoiced Pending Estimate

Purchase options

A purchase order can be marked as an 'option'



Phase au00565.002 Colour Printing

Purchase Estimate: Colour Printing: {EST}

Enterprise Trust 16/au00565.002 Design

Convert to Real

Supplier: Hammer & Co 16/MC
Contact: James Bolan
Their ref:

Details | Text | Lines | Delivery | Notes | Tender | Attachments

Main details

Ordered by: Mike Pender
Supply type*: Accounts Payable
Description: Colour Printing

Status

Mark as investment / non-chargeable

Picked for:

Estimate Quote Option

	Actual	Estimate		
Date	16/07/2012	16/07/2012		
VAT		1 (UK 20%)		
Cost	0.00	6000.00	Original cost	0.00
Markup	0.00 %	0.00 %	Standard markup	0%
Charge Out	0.00	6000.00		

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.

Weekly timesheet: SYN_Matt

Actions: Add job, Submit all

Client	Job Phase	Stage	Charge code	2 Mon	3 Tue	4 Wed	5 Thu	6 Fri	7 Sat	8 Sun	Total Hours
Ward Homes Design new web site12345	509.008		Artwork								0
13th Beach Golf Resort (Base) Website Design - Phase desc 1	552.001		Artwork	0	0	0	0	0	0	0	0
13th Beach Golf Resort (Base)	896.001		Amends New								0
13th Beach Golf Resort (Base)	10558.A01	Artwork phase	Artwork								0
Daily Total Hours				0	0	0	0	0	0	0	0
Hours required											28
Chargeable entered											0
Non-chargeable entered											0

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

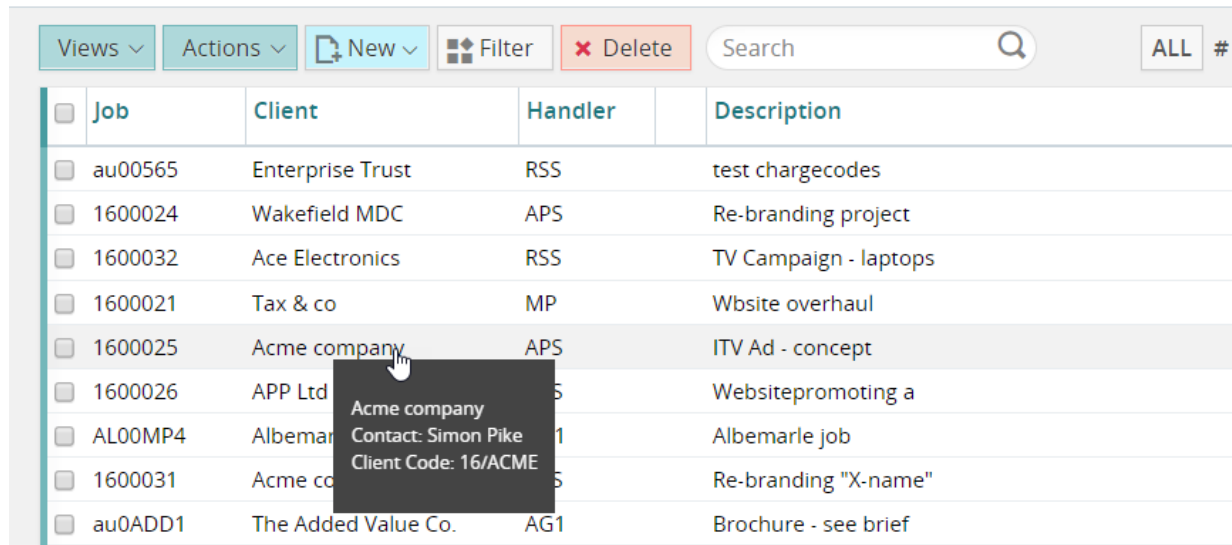
Hover text

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.

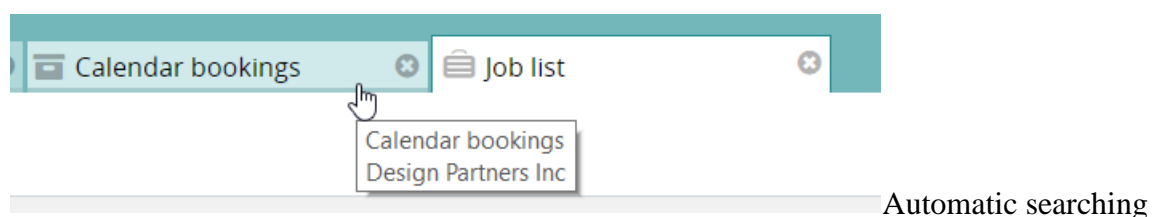
Job list - Open jobs



Job	Client	Handler	Description
au00565	Enterprise Trust	RSS	test chargecodes
1600024	Wakefield MDC	APS	Re-branding project
1600032	Ace Electronics	RSS	TV Campaign - laptops
1600021	Tax & co	MP	Wbsite overhaul
1600025	Acme company	APS	ITV Ad - concept
1600026	APP Ltd	S	Websitepromoting a
AL00MP4	Albemar	1	Albemarle job
1600031	Acme co	S	Re-branding "X-name"
au0ADD1	The Added Value Co.	AG1	Brochure - see brief

Main tabs

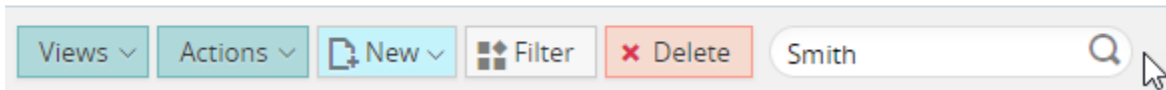
For users who often have multiple companies open at the same time the hover on the tab is a useful way of identifying the company selected for the tab in question.



Automatic searching 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.

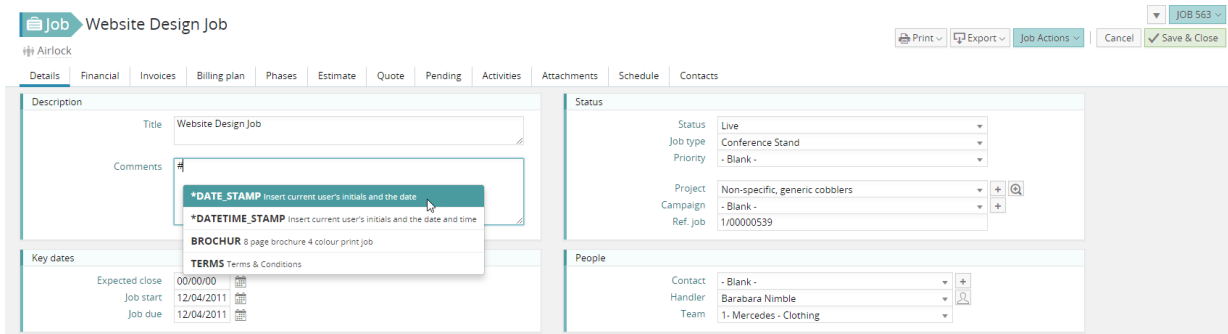
Job list - Open jobs and quotes



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 user enters a '#' symbol into a text area and a popup list of available standard paragraphs appear, the user then clicks on the required paragraph.



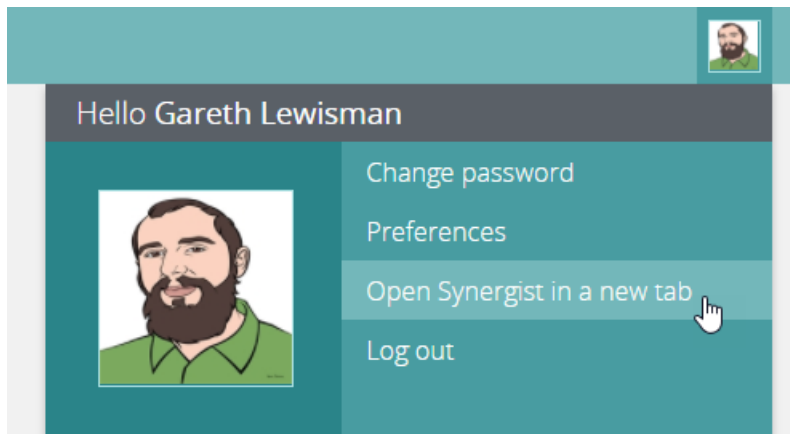
The user can create new standard paragraphs from within the FM area of Synergist.

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.

Scheduler List Confidence Creative Ltd

The screenshot shows a web interface for managing scheduled events. At the top, there are buttons for 'New' and 'Delete', a search bar, and an 'Actions' dropdown menu. Below this is a table with columns for 'Alert/process', 'Description', 'Last start date', and 'Last started time'. The 'Alert/process' column has checkboxes for each row. The 'Description' column contains the names of the events. The 'Last start date' and 'Last started time' columns show the dates and times when the events were last run. The 'Actions' dropdown menu is open, showing options: 'Run scheduled event now', 'Run scheduled event now and also any other active events', 'Activate scheduled event', 'Deactivate scheduled event', 'Check all active scheduled events', 'Restart Synergist scheduler', and 'Export'. The 'Run scheduled event now' option is highlighted with a mouse cursor.

Alert/process	Description	Last start date	Last started time
<input type="checkbox"/> Alert/process			
<input type="checkbox"/> Auto Upgrade Version Check	Auto Upg	03/04/2018	00:00:00
<input checked="" type="checkbox"/> PDF Server Process	Auto-Crea	02/10/2013	12:00:44
<input type="checkbox"/> Logged in Users and Temporary data Clear...	Auto-Crea	03/04/2018	00:00:00
<input type="checkbox"/> Auto Upgrade Version Check	Auto-Crea	03/04/2018	03:11:00

Test path feature

For testing server attachment path is valid.

System parameters

Settings | eMail | Server | **Attachments** | SDS | Restricted

Attachments folder

Windows: \\DEV\SyndeV\CRM\

Macintosh: SyndeV:CRM:

Server: c:\SyndeV\CRM\

Paths MUST correspond.
Choose the same folder for
Windows and Mac OS

Test server path

The screenshot shows the 'Attachments' tab in the 'System parameters' section. It features three text input fields for specifying paths: 'Windows' (\\DEV\SyndeV\CRM\), 'Macintosh' (SyndeV:CRM:), and 'Server' (c:\SyndeV\CRM\). Below these fields is a warning message: 'Paths MUST correspond. Choose the same folder for Windows and Mac OS'. At the bottom left, there is a button labeled 'Test server path' with a mouse cursor hovering over it.

Assume identity

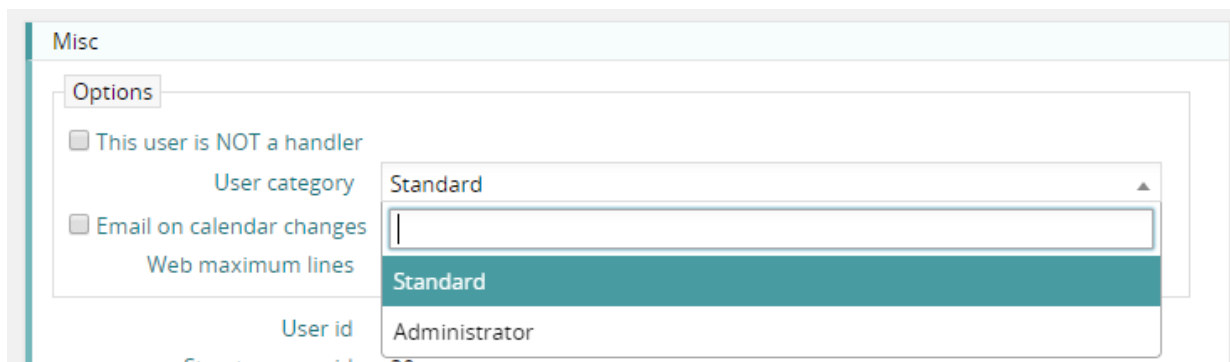
Assume user identity

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

Charge codes List Design Partners |

Charge code	Description	Charge rate	Cost rate	Department	Charge code type	Estimate sort order	Inactive
16/ah	Account handler	78.0000	0.0000	Administration	Customer services	23	
16/CT	Consultancy	90.0000	0.0000	PR Dept	Department 2	33	
16/CW	Copy Writing	110.0000	45.0000	Programming	copywriting	24	
16/days	Days charge code (n...	100.0000	0.0000			34	

1-4 of 4

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.