

# synergist<sup>®</sup>

Version 12.3 - Release Notes

Synergist Browser Interface

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## Contents

<b>SYNERGIST V12.3 RELEASE</b>	<b>8</b>
Overview	8
<b>ACCOUNTS LINKS</b>	<b>9</b>
Count of unbatched postings for each type of entry	9
Revenue Recognition - Deferred or Accrued income	9
Revenue Recognition - Nominal postings	9
Xero accounts link	10
Tax code description field use and Tax Drop downs	10
<b>ACTIVITIES</b>	<b>11</b>
Activity comments - improved design	11
Batch update	12
Create an activity from activity list	12
Checklists for activity records	13
Activity form re-design	14
Permissions	14
Document folder activity types	15
<b>ATTACHMENTS</b>	<b>16</b>
Synergist HTML documents	16
Stages 'attachments' tab	22
<b>BILLING PLANS</b>	<b>23</b>
Invoicing from billing plans	23
Billing Plans - recognise value	23
Locking / adjusting billing plans	24
<b>CALENDAR BOOKINGS</b>	<b>27</b>

Requisition actioned slider	27
Booking descriptions	28
Colour from schedule stages to show in calendar	29
Timesheet data visible from a requisition	30
Copying a booking	30
Deleting future bookings	30
Loading warning	31
Add event	31
Create recurring events (Paste special)	32
The calendar bookings estimate list	33
<b>CALENDAR - MYCALENDAR</b>	<b>34</b>
Out of Office	34
Add event	35
Processing requisitions in MyCalendar	38
User access rights - MyCalendar	39
Booking descriptions	39
Quick timesheet	40
<b>CLIENTS. PROSPECTS &amp; LEADS</b>	<b>41</b>
Client prices	41
Social media	41
Leads	42
Creating a job from client record	45
Recalculating client investment	45
Managed sales orders	45
<b>CLIENT CONTACTS</b>	<b>46</b>
Filter by email addresses	46
Inactive date filter	46
Client contact - job & phases tabs	47
<b>CRITERIA &amp; VIEWS</b>	<b>48</b>

Saving a view - creating a tab	48
<b>DATA VIEWER</b>	<b>49</b>
Include zero value records	49
Reporting on billing plans	49
Requisitions	49
Fields from more tables available to add	50
Pivot-ready output for Data Viewer scheduled events	50
<b>DASHBOARDS</b>	<b>51</b>
Pipeline	51
Revenue recognition	51
Net profit	52
Saving dashboard views	52
<b>ESTIMATING</b>	<b>53</b>
Creating estimate views	53
Option to show remaining budget	54
Packages	54
<b>EXPENSES</b>	<b>55</b>
Expense lines - sorting	55
Copy an expense line	55
<b>FILE MAINTENANCE</b>	<b>56</b>
User table	56
Control of currency exchange rate override	57
New system setting to define default access for new users	57
<b>INVOICING</b>	<b>58</b>
Custom fields	58
Repeat invoice	59
Bill-to-client	59
Overriding the default VAT value	61

Multi-job invoices	62
<b>JOBS &amp; PHASE</b>	<b>63</b>
Job create - views	63
Thermometers on job phases tab	64
Financial page - recognised	64
Charts	64
Special feature for Architects	65
<b>KANBAN BOARDS</b>	<b>66</b>
Kanban cards	67
Using the Kanban board	68
Creating a Kanban board	70
Adding a new Kanban status	71
Adding a Kanban board	71
<b>MYTASKS</b>	<b>73</b>
Export	73
<b>PROJECTS &amp; SUB-PROJECTS (CAMPAIGNS)</b>	<b>74</b>
Job creation	74
Custom fields	74
<b>PURCHASING</b>	<b>75</b>
Create purchase from main list	75
Purchase “discount” feature	75
<b>QUOTING</b>	<b>79</b>
Saving a view	79
<b>REPORTING</b>	<b>80</b>
Purchase orders report	80
Purchase invoice awaited report	80
Client analysis report	80
Staff utilization	80

<b>SUPPLIER CONTACTS</b>	<b>81</b>
GDPR clear down feature	81
<b>TIMESHEETS</b>	<b>82</b>
Weekly timesheet auto save	82
Weekly timesheet - additional timesheet	82
<b>GENERAL ENHANCEMENTS</b>	<b>83</b>
New hovers	83
<b>ADVANCED FEATURES</b>	<b>84</b>
SQL database replication	84
Utilities	84
Synergist API v3.3	84

# Synergist v12.3 release

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## Overview

Synergist v12.3 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.

### Key developments in this release:

- Kanban boards
- Activity checklist
- Synergist documents & templates feature
- Creating tabs on jobs & client based on a view
- Discount feature for Media buying

### Synergist v12.3 requires 4D Server v17

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

## Accounts links

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### Count of unbatched postings for each type of entry

Previously, to find out if there are any unbatched postings for purchases (or nominal) you had to click on the radio buttons to see if there are any present. Now, an unbatched count for each of Sales, Purchase and Nominal selectors is shown.

### Revenue Recognition – Deferred or Accrued income

A new field has been added to specify Accrued or Deferred income for all sales transaction types when revenue recognition is enabled in company settings. The default for new transactions is set (if invoicing from a job or phase), based on any previous documents for the job/phase or based on any existing deferred/accrued balance for the job or phase. The default can be overridden manually for each transaction, if required.

Reports previously showed a single deferred amount which was either positive or negative. This is now separated into 2 columns, deferred value and accrued value, on relevant exports, based on the new setting from individual transactions.

### Revenue Recognition – Nominal postings

Previously, when a sales invoice was created the nominal analysis was designed to post the full invoice value to the accounts P&L. This meant that a reversing manual journal was required at each month-end to make an entry for the outstanding deferred revenue balance.

A new company switch is now available to change this behaviour. When enabled, the system will post only the recognised amounts from sales transactions to the account's P&L whilst also posting a balancing entry for the deferred or accrued amount to a balance sheet account - deferred revenue or accrued revenue, based on the deferred / accrued setting for the transaction in question. The nominal codes for these two balance sheet accounts are specified in company settings.

In addition, revenue transactions will now create nominal analysis records that will be posted to the relevant P&L accounts and again a balancing entry posted to the deferred revenue or accrued revenue balance sheet nominal account as required.

The new company switch is only available when Sales Header Analysis (tied or not) is enabled, revenue recognition is enabled and you are using one of Synergist's accounting system links that support the posting of nominal journals. Previously this was only Exchequer.

### **Accounts links now supported for Nominal journal posting**

- Exchequer
- Xero
- Sage 50 Direct Interface 2016/v22 or higher
- Aqilla

## Xero accounts link

### 2<sup>nd</sup> reference

Job number is now an option to use as the second reference for sales transactions.

### Invoice line detail included in Xero export

New option, specifically for Xero link, to enable this in company settings. This will only apply to invoices made real following the upgrade.

### Company settings

Details	Defaults	Codes	Accounts	<b>Accounts Details</b>	Periods	Switches	Billing Plans	Job Custom
Users	Flowzone	Log						

Accounts details

Swap PIR references on purchase export

Tracking category 1 name

Tracking category 2 name

Sales - 'reference' taken from

Select for job/phase number (default - order number)

Append sales invoice line detail to description

Default status for sales

Default status for purchases

**Note:** The maximum size of Xero's invoice line description is 4000 characters. Any more text than this will be truncated by Xero.

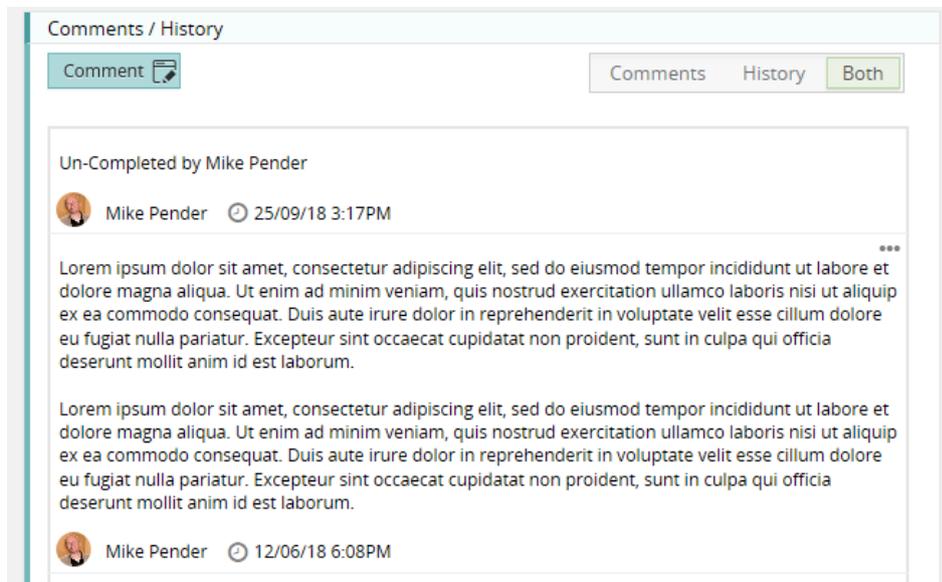
## Tax code description field use and Tax Drop downs

Tax/VAT Description field is now displayed when selecting from a list of tax codes.

For Xero users, the internal Xero API code for tax codes was previously displayed. This is no longer shown when selecting from a list of tax codes.

## Activity comments - improved design

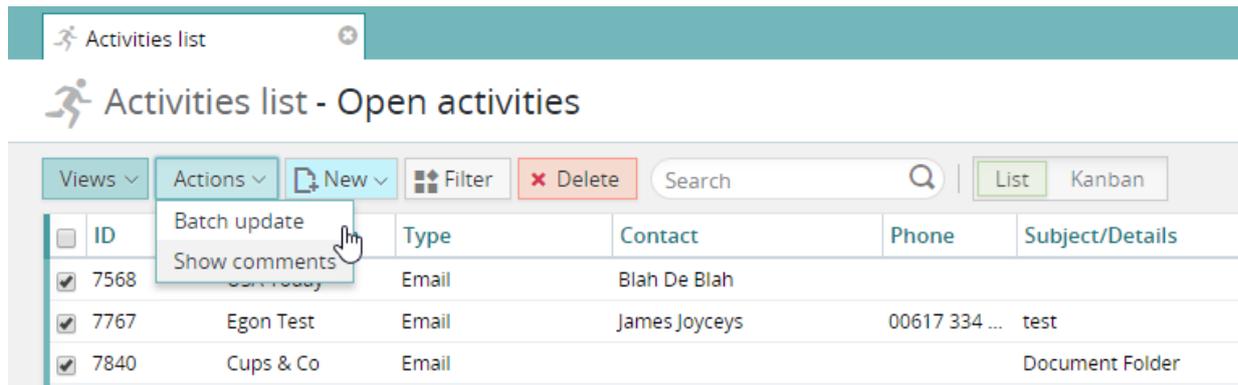
The comments section of activity records has been moved to the main details tab of the activity, and its design improved. The comments list includes both manually created comments and system generated history items. If you wish to only see the comments, select 'Comments' from the three-button selector at the top right.



## Batch update

Activities now have a batch update feature

### Selecting the records to update



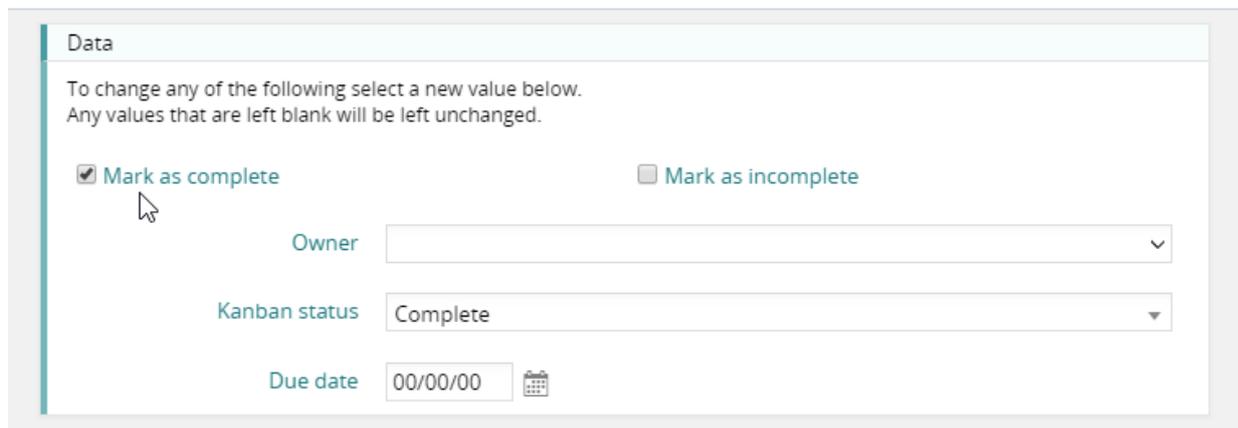
The screenshot shows the 'Activities list - Open activities' interface. At the top, there is a search bar and a 'Batch update' dropdown menu. Below the search bar, there is a table of activities with columns for ID, Type, Contact, Phone, and Subject/Details. The table contains three rows of data. A mouse cursor is hovering over the 'Batch update' dropdown menu, which is open and showing options like 'Batch update' and 'Show comments'.

ID	Type	Contact	Phone	Subject/Details
7568	Email	Blah De Blah		
7767	Email	James Joyceys	00617 334 ...	test
7840	Email			Document Folder

### Selecting fields to update

You mark selected activities as 'Complete' by either checking the checkbox or selecting the relevant Kanban stage. It is also possible to change the activity owner or due date.

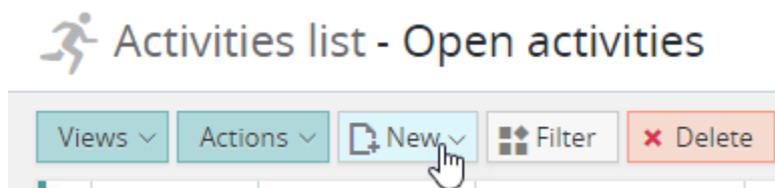
#### Activities batch process



The screenshot shows the 'Activities batch process' form. It has a title 'Data' and a description: 'To change any of the following select a new value below. Any values that are left blank will be left unchanged.' Below the description, there are two checkboxes: 'Mark as complete' (checked) and 'Mark as incomplete' (unchecked). There are three input fields: 'Owner' (a dropdown menu), 'Kanban status' (a dropdown menu with 'Complete' selected), and 'Due date' (a date input field with '00/00/00' and a calendar icon).

## Create an activity from activity list

It is now possible to create a new activity from the main activity list. On clicking 'New' you will be asked to select a client, and then the activity will be created. If you wish to link an activity to a job or a phase, you would normally create the activity from within the required job or phase record. However, it is also possible to do this within an activity using the new 're-file' feature (see below).



The screenshot shows the 'Activities list - Open activities' interface. At the top, there is a search bar and a 'New' button. Below the search bar, there is a table of activities. A mouse cursor is hovering over the 'New' button.

## Checklists for activity records

Checklists are a simple method of tracking specific tasks required before an activity record can be considered fully complete.

### Activity checklists have the following features

- Multiple checklists can be added to a single activity.
- If a checklist is added to an activity record on a Job template, it appears as a template to select when creating a new checklist. In this way, you can create a set of standard checklists.
- Checklists are very easy to create - the interface is designed to rapidly create a list of items.
- Ticking a checklist item marks it as 'complete', and puts a strikethrough the item description.
- You can hide completed checklist items.

### Creating a new checklist

Click 'New checklist' and enter a name for your checklist.

New checklist

Title

Copy items from

Optionally – select a template ...

New checklist

Title

Copy items from

Comments / History

### Your checklist

You can add new items and delete existing items as required.

Checklists

Meeting checklist

Agenda

Invites sent out

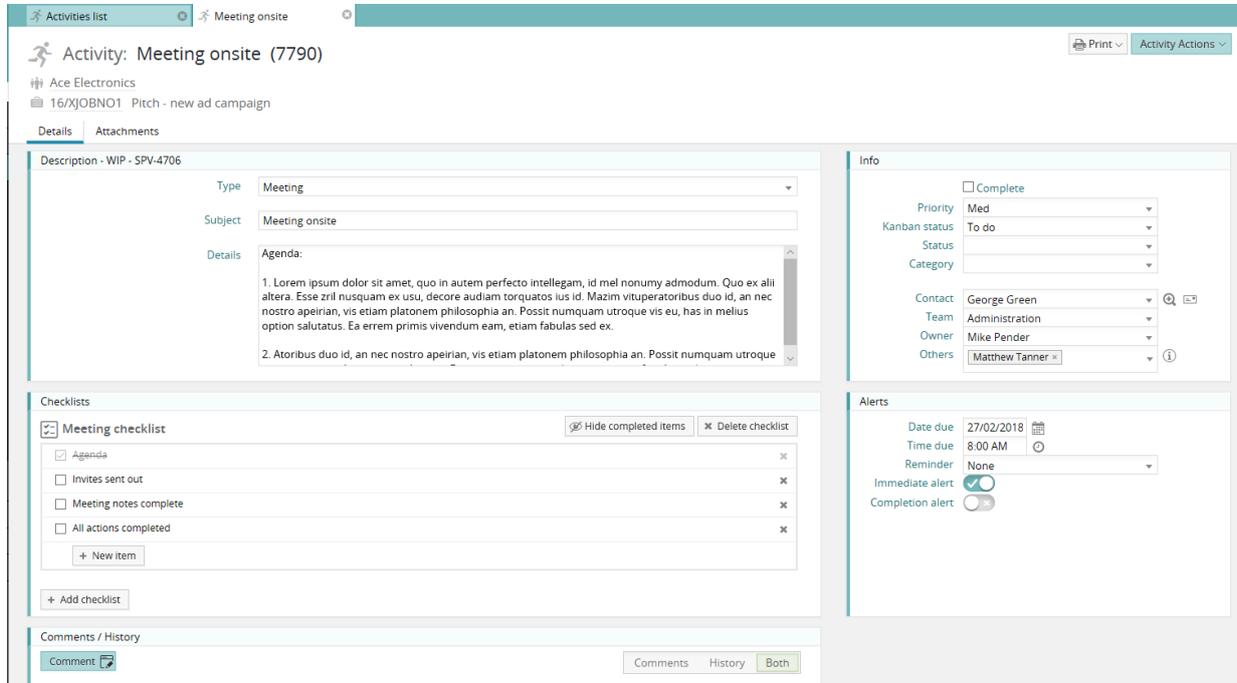
Meeting notes complete

All actions completed

# Activity form re-design

The activity form has been redesigned in order to better support some of the new features.

- Larger area to enter details
- Info panel – all key fields in one place
- New panel to handle checklists
- Comments moved to the details tab



## Permissions

It is now possible to set a user or group permission for deletion of attachments & activities.



## Document folder activity types

Document folders in Synergist are activity records that are used to reference one or more attachments. For most users, seeing this type of activity in the activity lists is unnecessary. We have therefore hidden this type of activity from all the standard system views. If you have any custom views, these are unaffected by this change. If you would like to amend your custom views to hide document folders, you will need to use the 'filter' option and re-save your views.

More filters Show inactive options

- ▶ Company
- ▶ Client
- ▶ Job & Phase
- ▼ Activity/Attachment

**Include**

Complete  Incomplete

**Requisition**

Actioned  Not actioned

**Exclude**

Hide document folders

Type  Copy

# Attachments

---

## Synergist HTML documents

Synergist already supports the attaching of existing external documents to various areas of Synergist. E.g. Activities, Client, jobs and phases.

It is now possible to **create** a new document inside Synergist. In this case, the 'document' is a special HTML one. This 'Synergist document' is editable within Synergist, utilizing the new built-in document editor.

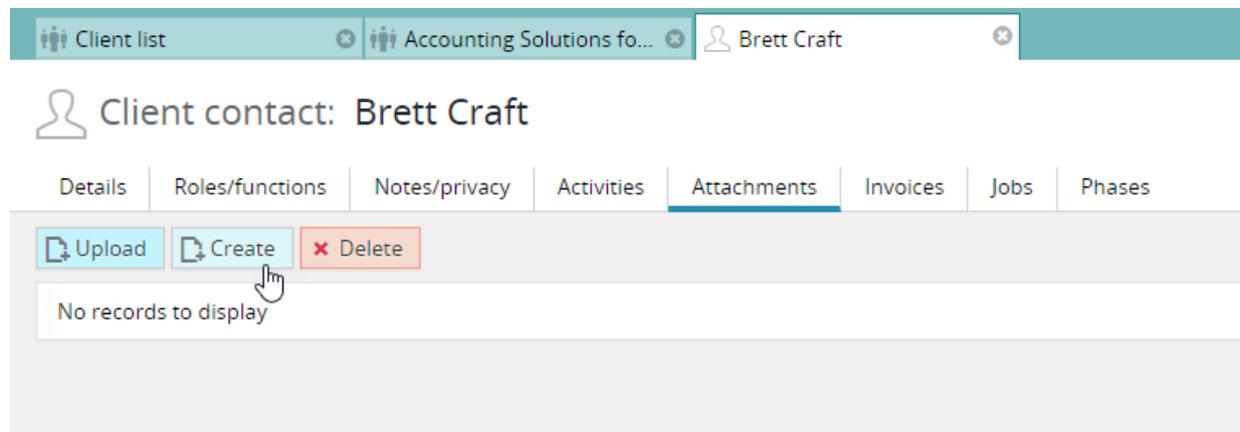
These documents are not designed to be accessed externally to Synergist. If you wish to send the document to a client or colleague, you simply click the PDF button, and download a PDF version of the document.

Synergist provides a new fully-featured WYSIWYG editor that handles images as well as formatted text. It also provides an image editor.

Administrators with access to File Maintenance, can also create Synergist document templates. These document templates can include special fields, which are merged into a newly created document to include client or job information.

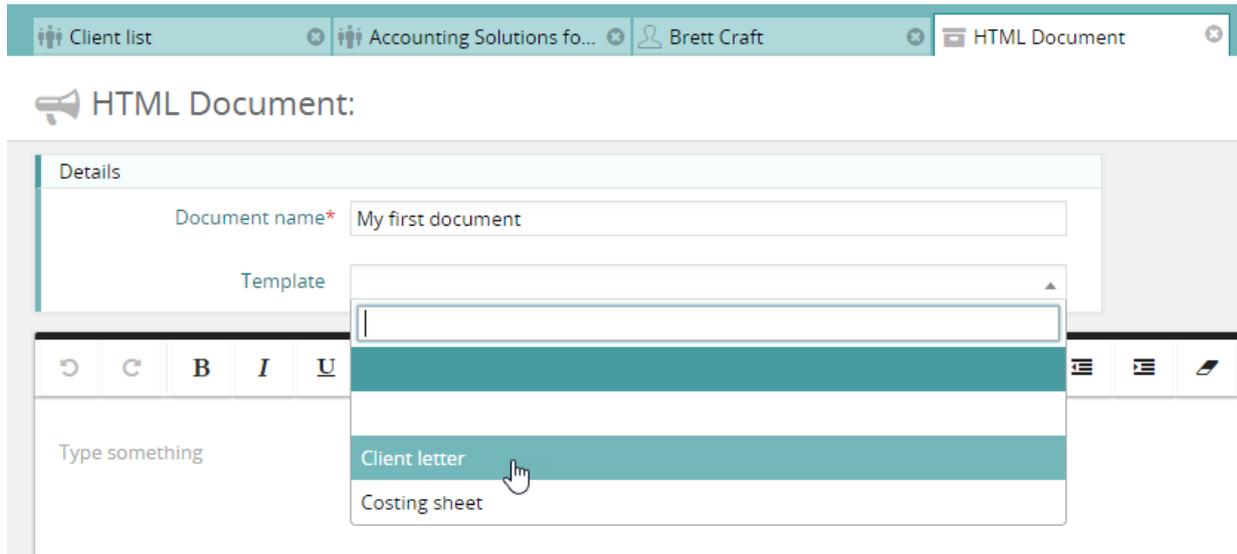
## Creating a new 'Synergist document'

A user can create a document from any attachments tab in Synergist. In this example, we will create a document from a client contact record.



## Selecting a template

The user can now simply type in text, or select to insert images – similar to working in a Word document. However, he/she might wish to first select a document template to base the new document on and automatically fill out/merge any fields contained in the template.



The template loads, and any fields in the template are automatically replaced with Synergist data in the new document.

Client list Accounting Solutions fo... Brett Craft HTML Document

### HTML Document: My first document

Details

Document name\* My first document

Template

Accounting Solutions for Business  
123 Stoney Springs Mill  
Burnley Rd  
Hebden Bridge  
West Yorkshire  
HX7 ABC  
United Kingdom

**Our ref:** 16/ASB

Dear Mr Craft,

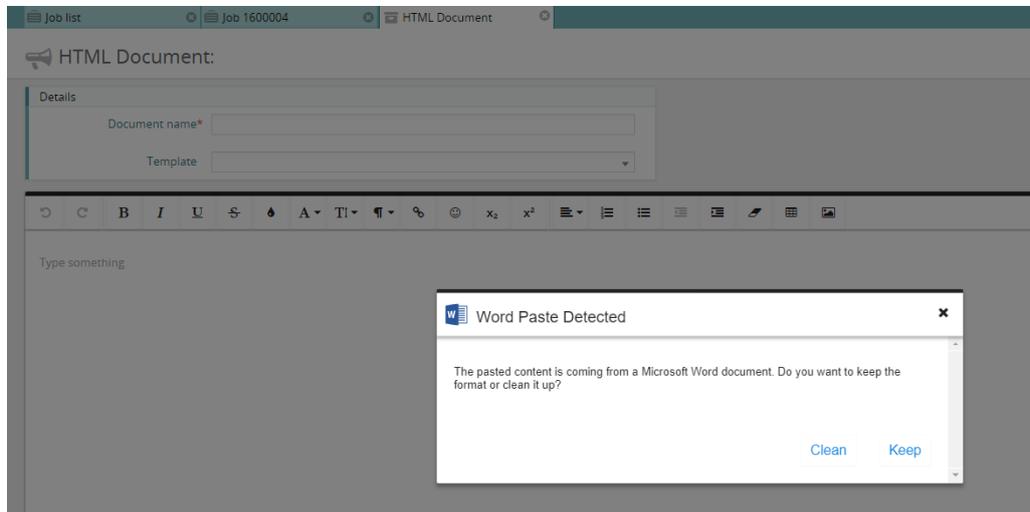
Kind regards,

Mike Pender  
Account director

## Pasting in a Word/excel document

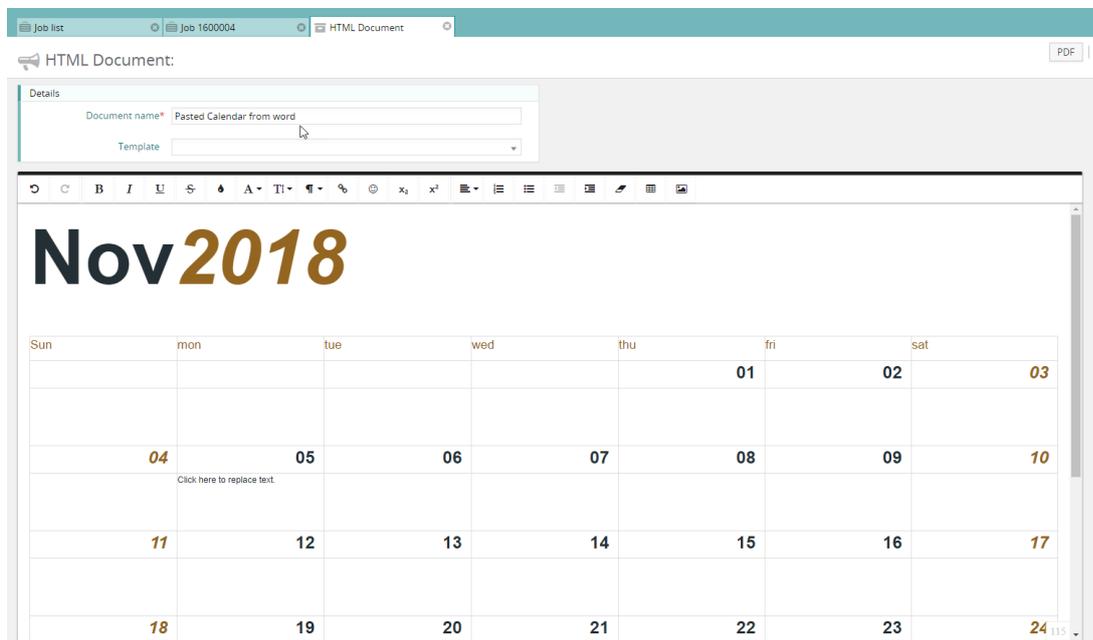
If you open a Word or Excel document and copy the contents to the clipboard, you can then paste this data into a Synergist document.

Synergist will ask if you wish to keep the Word formatting or clean it up. If you clean it up the document will have less redundant markup – but will have less of the original formatting.



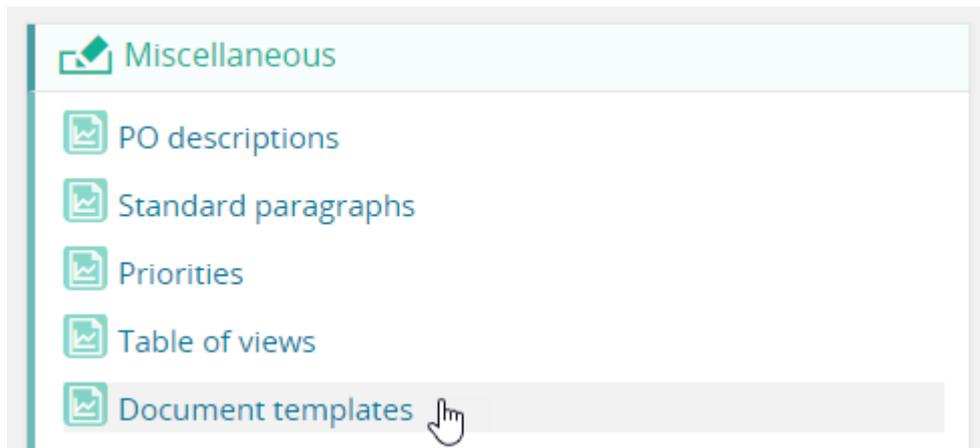
### Example:

Resulting document – after pasting in a calendar from a Word document



## Creating a template

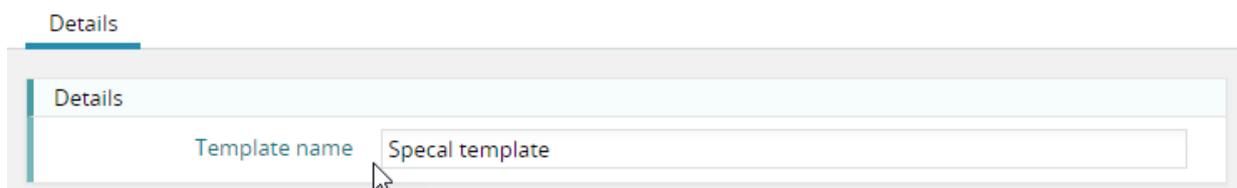
Users with File Maintenance access rights are able to create document templates. To create templates, select 'File Maintenance' from the cog menu.



## New template

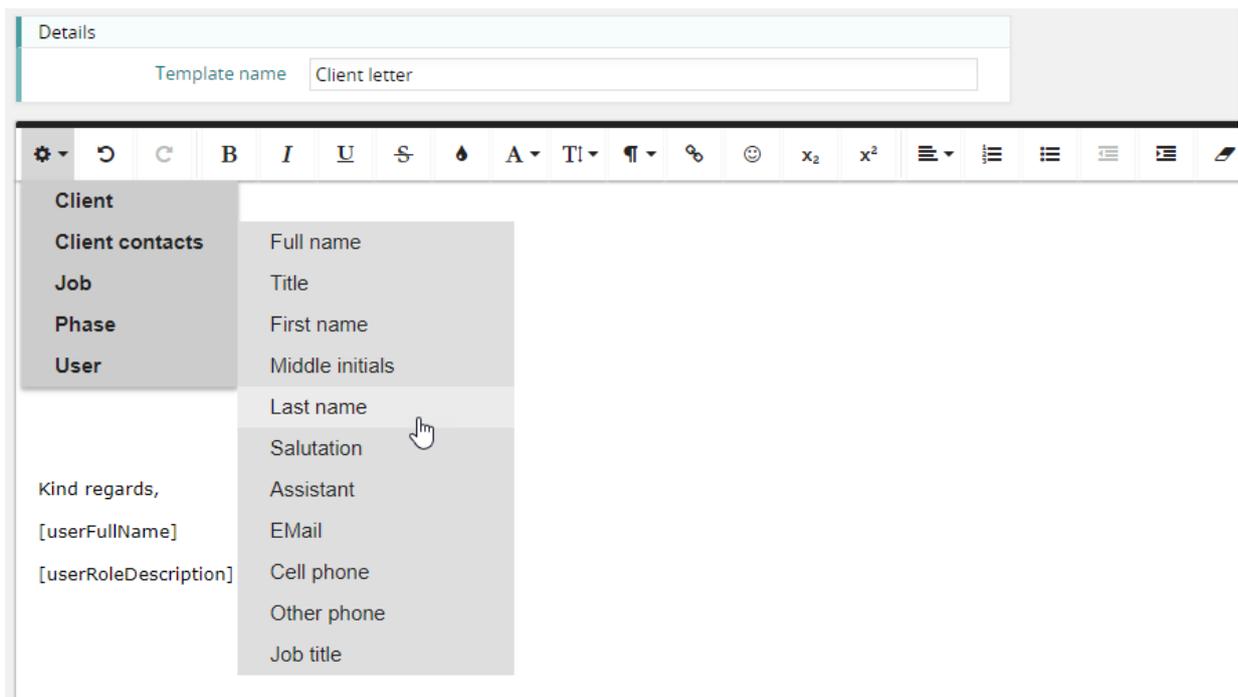
Click 'New' and give the new template a name.

## Document templates



## Adding text and fields

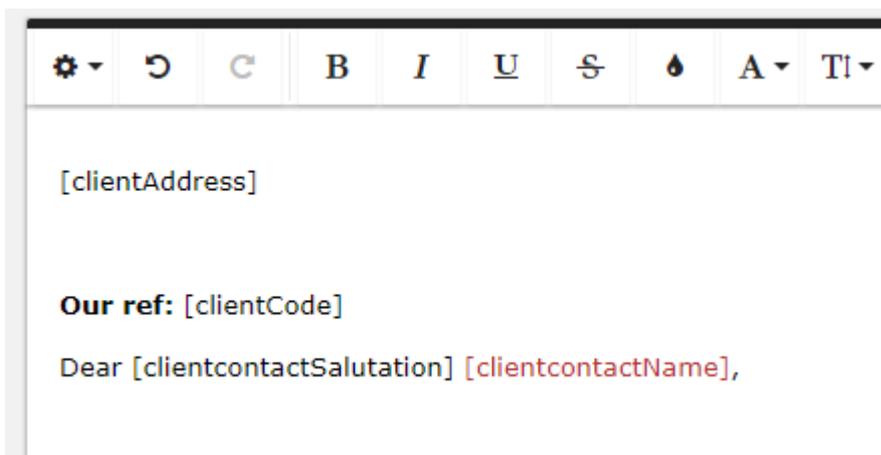
From here, you can now add standard text and embed fields.



## Embedded fields

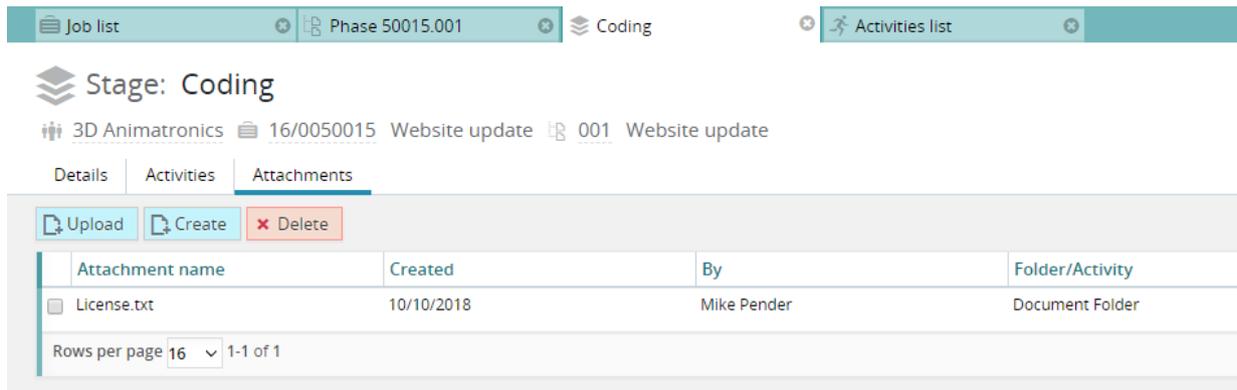
A new field has now been added to the document template (see field marked in red). When a user subsequently selects this template to create a new document, the contact name will be automatically inserted into the document.

**Note:** Not all fields are available when using a template. For instance, you will need to create a document from within a job to access a job number.



## Stages 'attachments' tab

Documents can now be attached to stages of a job/phase.



The screenshot shows a web interface for managing attachments. At the top, there is a breadcrumb trail: Job list > Phase 50015.001 > Coding > Activities list. Below this, the current stage is identified as 'Stage: Coding'. The breadcrumb trail continues with '3D Animatronics > 16/0050015 Website update > 001 Website update'. The 'Attachments' tab is selected, showing a table with one attachment: 'License.txt', created on 10/10/2018 by Mike Pender, located in a 'Document Folder'. The interface includes buttons for 'Upload', 'Create', and 'Delete', and a pagination control showing 'Rows per page 16' and '1-1 of 1'.

Job list Phase 50015.001 Coding Activities list

Stage: Coding

3D Animatronics 16/0050015 Website update 001 Website update

Details Activities Attachments

Upload Create Delete

	Attachment name	Created	By	Folder/Activity
<input type="checkbox"/>	License.txt	10/10/2018	Mike Pender	Document Folder

Rows per page 16 1-1 of 1

# Billing plans

## Invoicing from billing plans

For companies that are using revenue recognition, by default the 'Auto' button would previously allocate revenue in accordance with what was specified in the billing plan. Now there is an option to override this default behavior using the new defer/recognise actions.

**Draft invoice: D1600217**  
 Enterprise Trust 16/au00565.003 Print

Type: Invoice  
 Revenue balance: Deferred  
 Final:   
 Inv date: 10/10/2018  
 Order number:

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

Job Phase	Description	PT	C	Already recognized	Recognize now	Total recognized
16/au00565.003	Print	PRI		0.00	0.00	0.00
				Value	£0.00	£0.00
				Total target value		
				Difference		

Auto allocate

Cost                       Actual  
 Charge                       Estimate  
     Tickoff

Auto 

- Allocate revenue as per BP
- Recognise all
- Defer all

## Billing Plans - recognise value

The recognise value of a billing is now, by default, the same as the planned value. It is also synched to this value so any change in the percentage planned affects both figures. If you now wish the recognise value to be independent of the planned value, tick the checkbox – the recognise figure can then be overridden.

Planned values			
%	Planned value	Notional costs	Profit forecast
75.00	75.00	0.00	75.00
<input checked="" type="checkbox"/> Recognise value	75.00		

## Locking / adjusting billing plans

Billing plans are used to create a plan of how much and when you plan to invoice a client (or recognise revenue) for a specific job or phase of a job. Typically, this is based on a percentage of the quoted value – broken down over several months. Individual billing plans can be used to generate invoices, credits or revenue transactions.

We have introduced a new feature to billing plans that enables users with the required access level to lock and unlock billing plans. In addition to this, the system will automatically lock a billing plan against any changes once it has been used to generate an invoice.

### Locked billing plans

You can see if a billing plan is locked by looking at the billing plan list on a job/phase. Locked billing plan items have a padlock visible.

 **Phase** Print

 Enterprise Trust

Details	Financial	Invoices	Billing plan	Time	Materials	Purch & exp.	Estimate	Quote	
Actions ▾ <span>New</span> <span>Delete</span>									
	Month	Year	%	Planned value		Recognise			
<input type="checkbox"/> 	Oct	2018	75	£75.00		£75.00			
<input type="checkbox"/> 	Nov	2018	50	£50.00		£50.00			
			<b>Totals</b>	<b>125</b>	<b>£125.00</b>		<b>£125.00</b>		

### Locking/unlocking a billing plan item

This is done using the checkbox on the billing plan.

 **Billing plan**

 Enterprise Trust  16/au00565.003 Print

Total quoted	£100.00
Total est purchase costs	£0.00
Remaining left to plan on phase	-£25.00

Date

Month: Oct

Fixed date  Relative date

Calculated date 09/10/2018

Locked  
by Mike Pender on 10/10/2018 at 4:28pm

## Recalculating a billing plan

If you have locked a billing plan item, for instance, you may have billed one of the items in the plan; there is a dilemma if the total quote for the job or phase changes. You need to decide whether the entire plan or just the remaining part of the plan is to be updated to take into account the change to the quote. How the system behaves depends on a new company setting.

### The options are these:

- Recalculate all BPs (the current behavior and the default)
- Recalculate unlocked BPs
- Recalculate unlocked BPs to match quote value

## Company settings – billing plans page

**Billing plans**

Enable billing plans

Billing plan levels allowed: Phase only

**Options**

Synched with quote  
If quote changes after BP(s) are locked

Notional costs/profit

Enable weighting

**Relative dates**

Fixed or Relative

Date to use for job BPs

Date to use for phase BPs

Default offset (Months): 3

Enable auto billing plans

Recalculate all BP's

Recalculate UNLOCKED BP's

Recalculate UNLOCKED BP's to match quote value

Relative to

Job start date/expected close date

Phase start date

## Example of how this will affect your billing plan

Quote originally £1000, now changed to £2000

### 1. Current behavior - recalculate all BPs

50% £1000  
20% £400  
30% £600

### 2. Recalculate unlocked BPs

50% adjusted to 25% - £500 - planned value stays the same  
20% £400  
30% £600

Total 75%

User needs to either add a new BP for 25% or adjust the unlocked BPs  
Unplanned value £500

### 3. Recalculate unlocked BPs to match quote value

50% adjusted to 25% - £500 - planned value stays the same  
20% adjusted to 32.5% (half of the "25%") - £650  
30% adjusted to 42.5% (half of the "25%") - £850

Total 100%

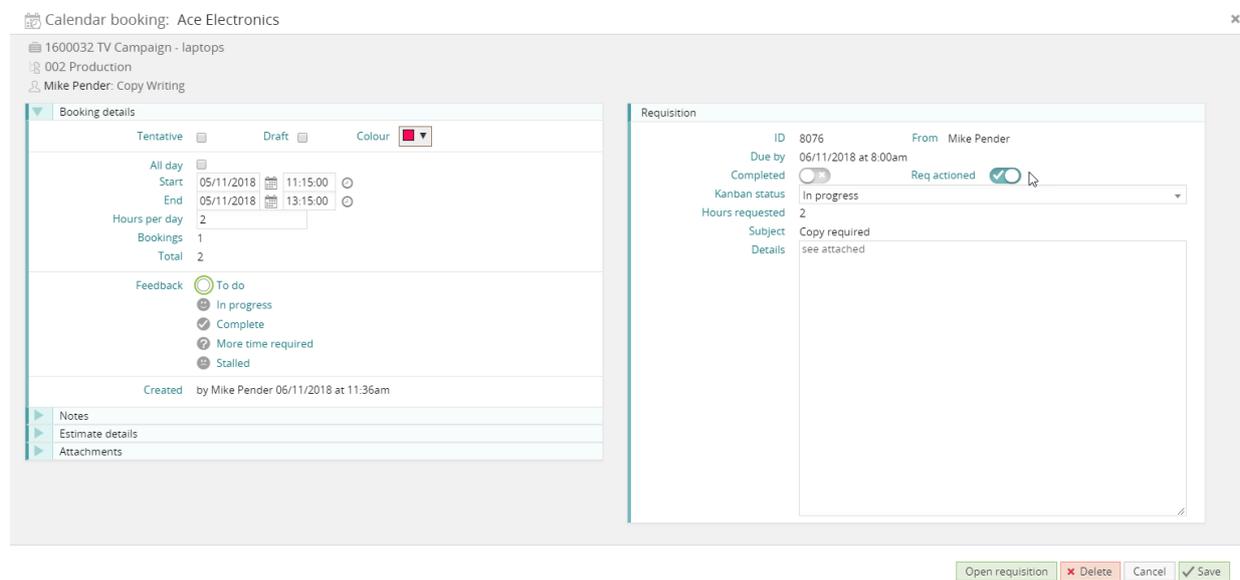
# Calendar bookings

## Requisition actioned slider

If you are using requisitions, a new option is available to help with the workflow of the requisition process.

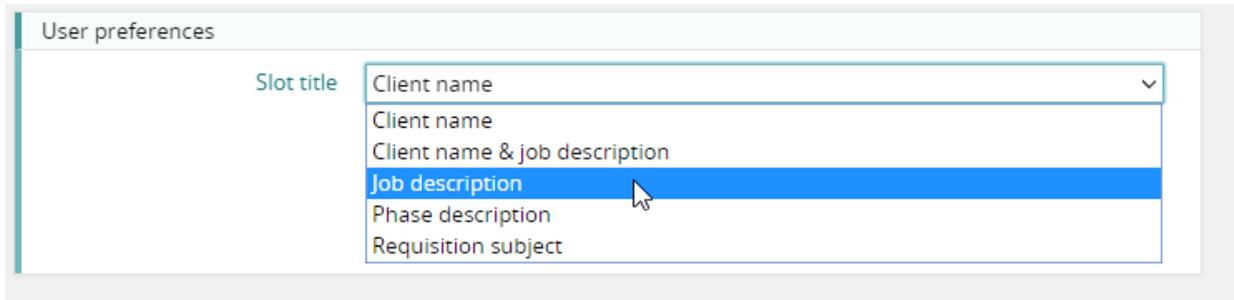
Typically, an account handler will raise a requisition for some work for a job. This appears as a requisition in the calendar requisitions list. Once work has been allocated to member(s) of staff, the handler would ideally wish to know that the request has been booked into the calendar. This is done by setting the 'Req. actioned' slider from the calendar booking.

**Note:** This will also impact the new Kanban feature (see below), since actioned requisitions are displayed with an amber tick in the Kanban chart. You may also wish to move the requisition to the next Kanban status.

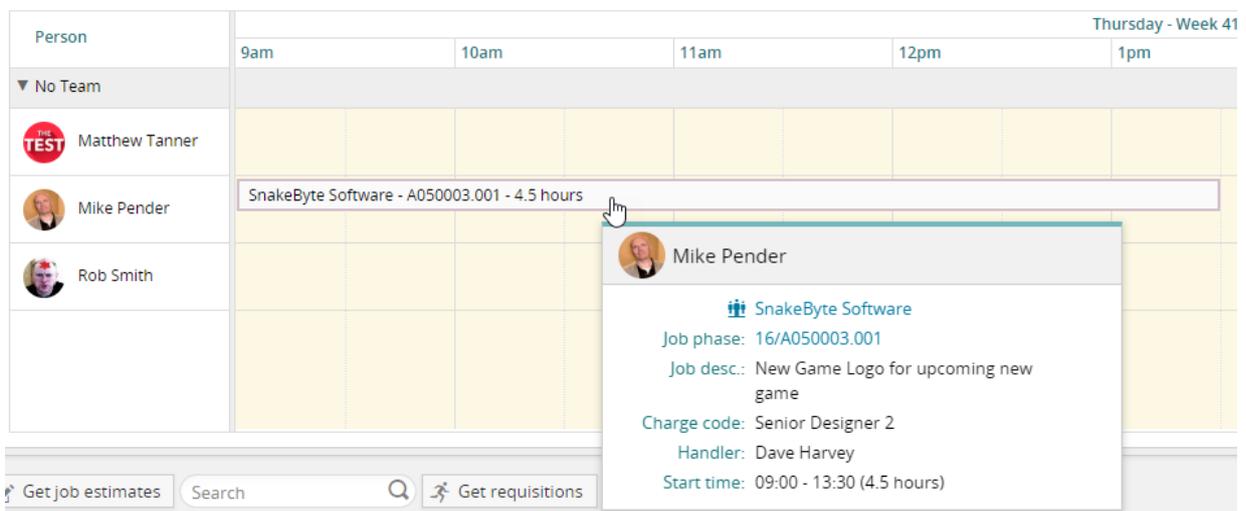


## Booking descriptions

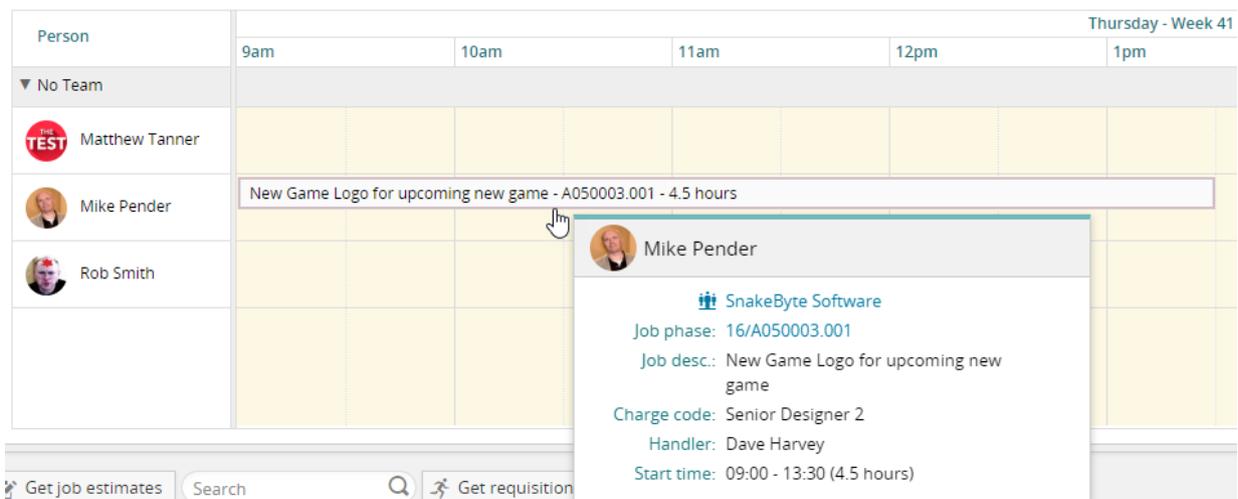
Previously the calendar would always display the client name and job number against all bookings. We now provide user settings that provides various options. This is particularly useful for companies who tend to do a lot of work for a single client – where the job description is more important than the client name.



### So this standard description ...



### Can become this – job description ...



## Colour from schedule stages to show in calendar

Previously only the current stage of a job/phase would affect the automatic colouring of calendar bookings. Now this feature has been extended to handle the stages of two tier style jobs, so bookings based on estimates that are linked to a stage from a schedule of stages will now appear with the colour associated with the appropriate stage.

**Note:** 'Current stage' still takes precedence, so to use this feature 'current stage' should be disabled in company settings.

### Example:

A colour has been set against the 'Amends' stage (in File Maintenance).

Design Partners Inc

### Stages List

New Delete  Actions

Active Page 1 of 1 << < > >>

<input type="checkbox"/>	Stage name	Default	Inactive	Order by	Colour	Stage code
<input type="checkbox"/>	Amends				<span style="color: cyan;">■</span>	AJA
<input type="checkbox"/>	Coding				<span style="color: gray;">■</span>	CO

Bookings now appear in that colour if the estimate is for the amends stage.

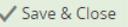
Website update - copy this - MP50020.001 - 2 hours

**Mike Pender**

**3D Animatronics**  
Job phase: 16/MP50020.001  
Job desc.: Website update - copy this  
Phase desc.: Website update  
Stage: Amends  
Charge code: Scanning work  
Handler: 4D Application  
Start time: 11:00 - 13:00 (2 hours)

## Timesheet data visible from a requisition

Requisitions, which are a type of activity record, now display calendar-booking information that includes the total of timesheets posted.

 Activity: Artwork required (7796)  Print  Activity Actions  Cancel  Save & Close

 ZZ Acme company  
 16/1600025.001 ITV Ad - concept blah

Details | Attachments | Calendar bookings

Resource	Job	Phase	Charge c...	Date	Hours	Start t...	End ti...	Colo...	Feedb...	Description	Time	non-...
Mike Pe...	1600...	001	Junior Mac...	08/10/20...	2	11:00:00	13:00:00		TODO	See spec for details	2	0
Helen W...	1600...	001	Junior Mac...	14/03/20...	2	10:00:00	12:00:00		TODO		0	0
Rob Smith	1600...	001	Junior Mac...	14/03/20...	2	09:00:00	11:00:00		TODO		0	0
TOTAL			6									

## Copying a booking

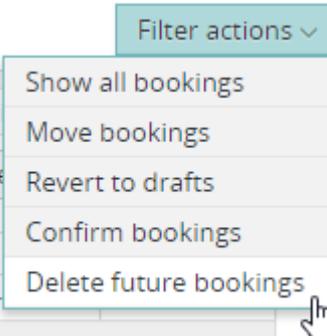
An option has been added to copy booking description and notes (in calendar user preferences).

Modes

- Hide unallocated task list
- Loading time slot:
- Warning when overloading
- Include description and notes when copying a booking

## Deleting future bookings

If a job is cancelled or delayed after being booked into the calendar, you are now able to delete all the future bookings for this job. To do this, simply filter the calendar to a single job and select this option from the Actions menu.

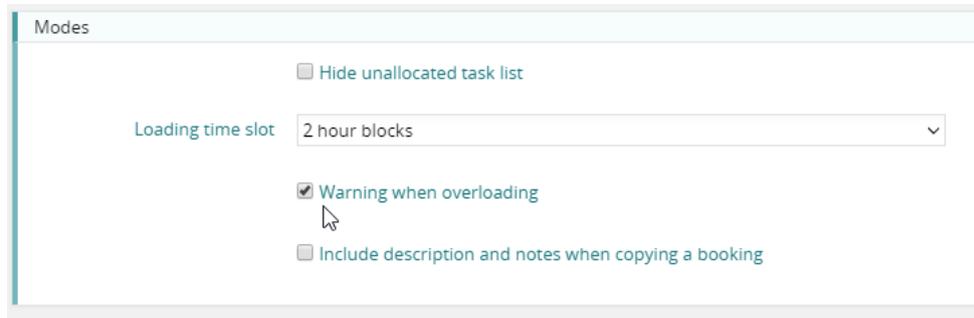


- Filter actions
- Show all bookings
- Move bookings
- Revert to drafts
- Confirm bookings
- Delete future bookings

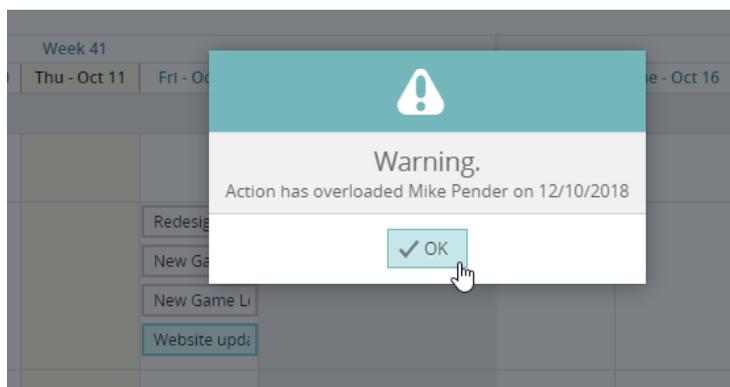
## Loading warning

The calendar has a new feature: 'Warning when overloading'. This feature is off by default but can be activated via the calendar user preferences section. If this feature is active, the user is given a warning if a calendar item that has been dropped or moved overloads the staff resource.

## Calendar preferences

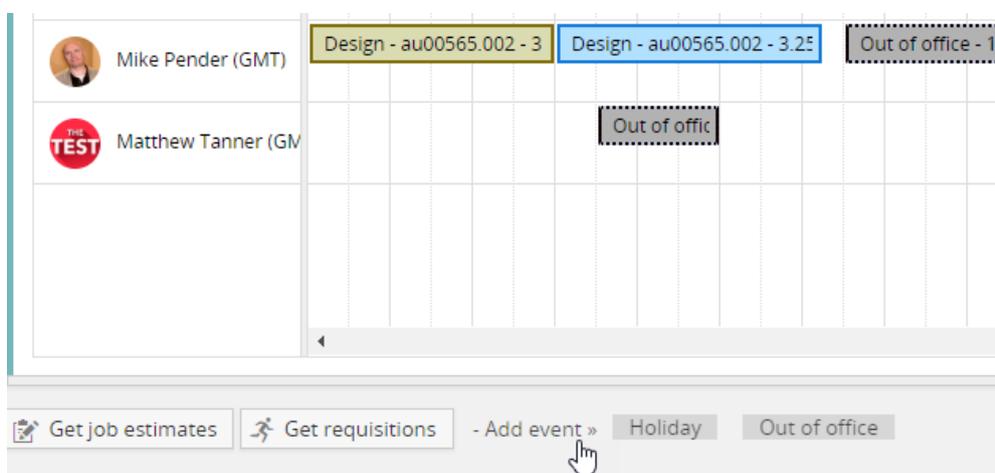


## Example of use



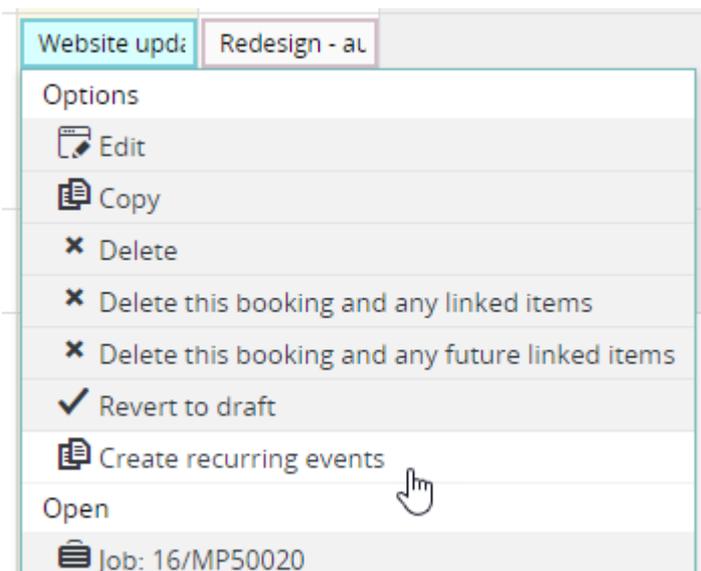
## Add event

A new feature 'Add event' is now available. This feature has been provided to make it easier to create booking events for holidays and sickness. Instead of selecting estimates on 'holiday jobs' from the main list, the Traffic manager can drag from this list of special charge codes. For more information on this feature, see the section 'MyCalendar'.

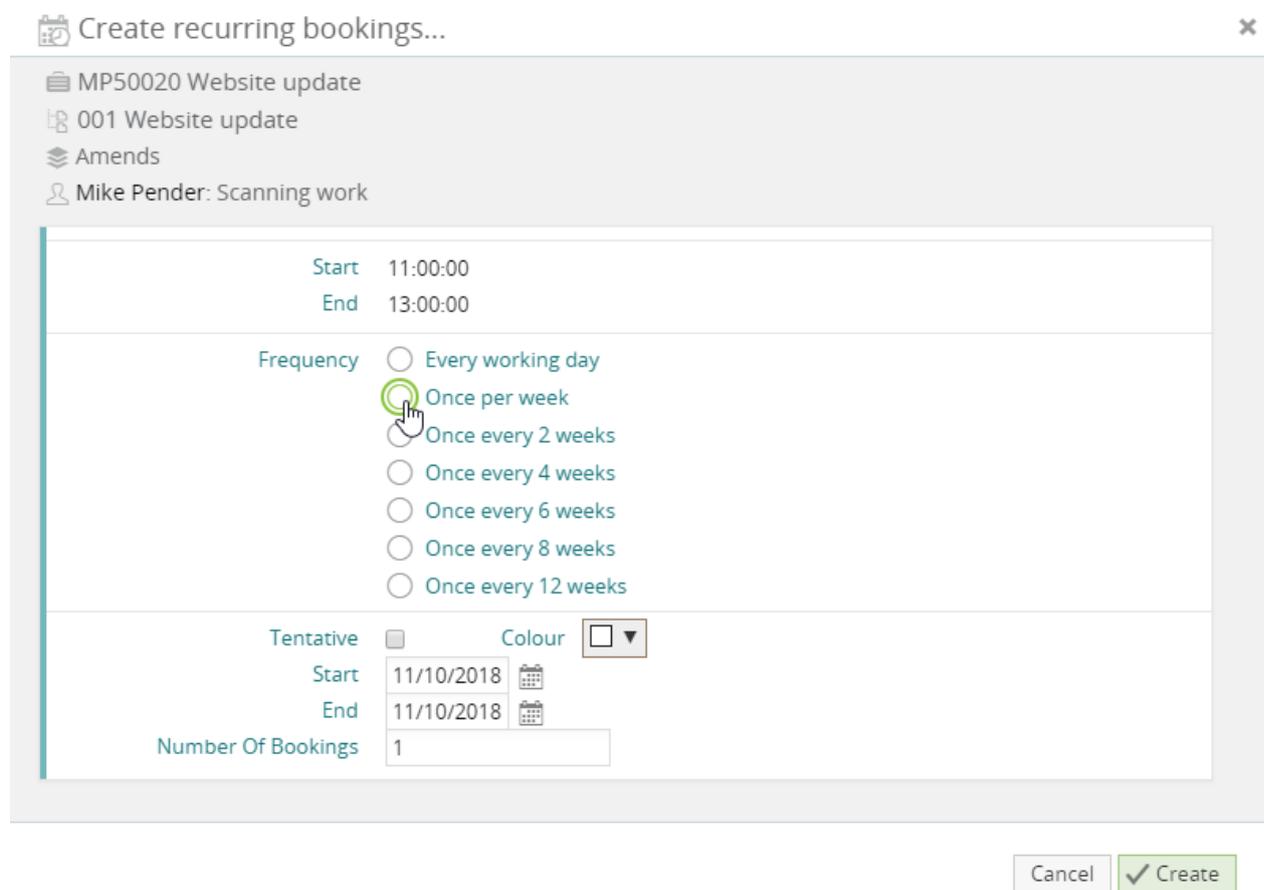


## Create recurring events (Paste special)

To use this feature, first create a booking and then right-click that booking. Select 'Create recurring events'.



You can create recurring bookings based on the booking you originally selected. Various options are available.



# The calendar bookings estimate list

## The 'remaining to be booked' column

The remaining column was previously calculated as 'Estimated, less Total Booked'. This figure was not satisfactory for some users since it did not take into account work completed (i.e. timesheets) or bookings left uncompleted in the past.

There is now an optional calculation that can be used to calculate the time remaining to be booked. The new calculation is 'Estimated, less Past timesheets, less Future booked'.

Client	Job phase	Description	Stage	Charge code	Due date	Estimated	Booked	Remaining	Draft	Handler	Staff team
3D Animatronics	16/0050015.001	Website update/Web site design	Web site design	Planning	Fr 20/04/2018	5	0	5	0		
3D Animatronics	16/0050016.001	Website update - copy this/Website update...	Web site design	Planning	Fr 20/04/2018	5	0				
3D Animatronics	16/0050023.001	Website update - copy this/Website update...	Web site design	Planning	Mo 23/04/2018	5	0				
ZZ Acme company	16/1600025.001	ITV Ad - concept/TV Ad - concept blah		Account handler	Mo 05/03/2012	0	6	-6	0	APS	Account Man_Admin

To select this calculation, open the list preferences on the calendar bookings screen.

## List preferences

Options

Job/Phase Status

- Quote
- Live
- In-house
- On hold
- Special

Display

Remaining calculation: Estimated - Total booked

Number of lines: Estimated - Total booked

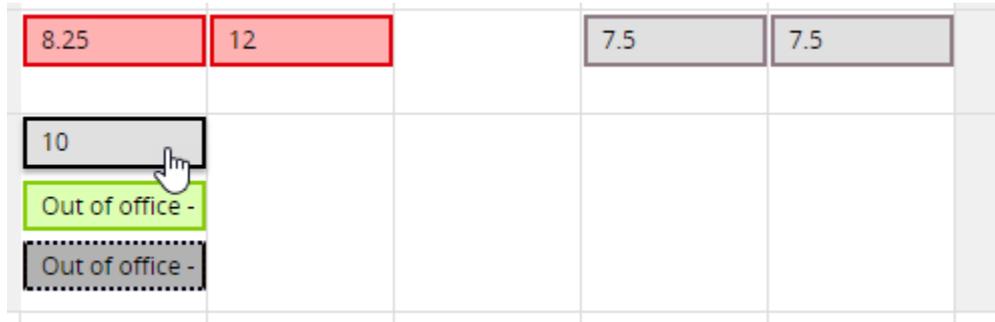
Estimated - Past timesheets - Future booked

# Calendar - MyCalendar

---

## Out of Office

If bookings consist of 'out of office' charge-codes, these now display as grey when the loading view is active. All other types of bookings use the red/amber/green colouring. In this way, it is easier to identify holidays etc. that appear fully booked but really represent no work being booked for the period.



The screenshot shows a calendar grid with several booking blocks. The top row contains four blocks: two red blocks with values '8.25' and '12', and two grey blocks with values '7.5' and '7.5'. The second row contains three blocks: a grey block with '10' (with a mouse cursor pointing to it), a light green block with 'Out of office -', and a grey block with 'Out of office -' (with a dotted border).

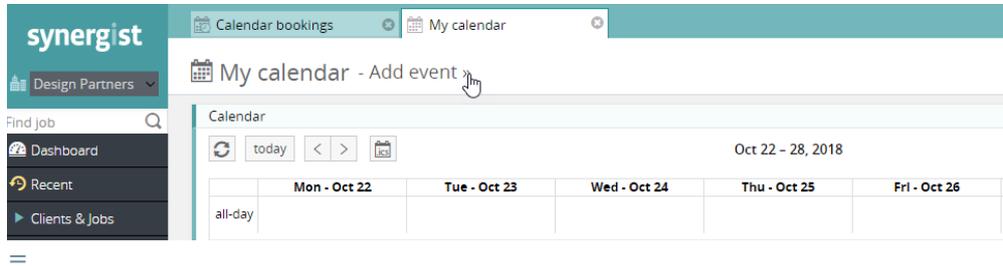
8.25	12		7.5	7.5
10				
Out of office -				
Out of office -				

## Add event

MyCalendar users can now book events into their own calendar. This is restricted to special jobs and charge-codes. This feature enables users to create tentative bookings for holidays, sickness and other non-job related activities.

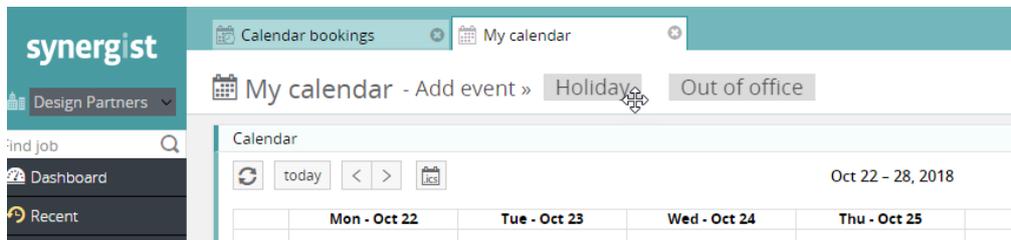
### Using the feature

The user clicks the 'Add event' button at the top of the calendar



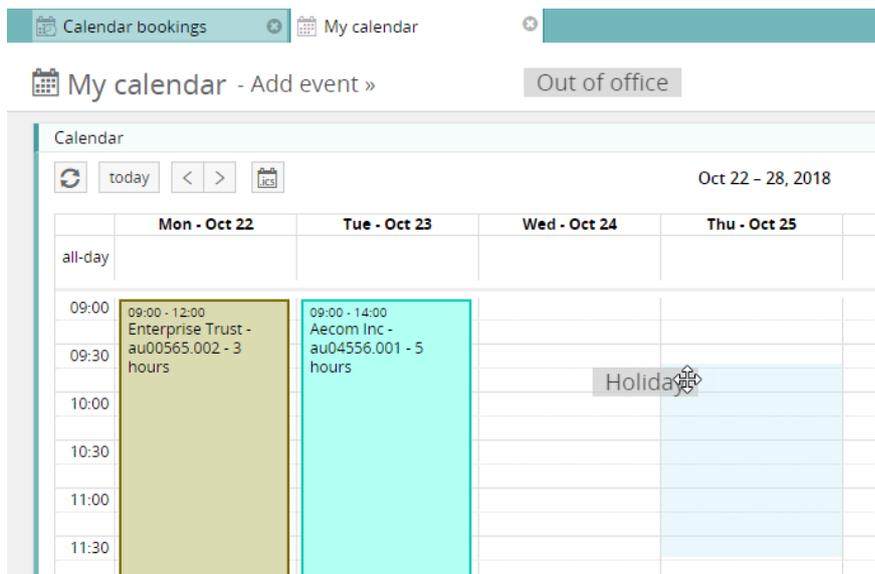
### Select a charge-code

The list of available charge-codes will then appear.



### Drag to the calendar

One of these items can then be dragged to the calendar.



## Booking input screen

A floating window will then appear where the user can specify the number of days of the event, description etc.

Calendar event Internal

Mike Pender: Holiday

Booking details

Job: Holidays

Phase: 001 - Holidays - 2018

Charge code: Holiday

Tentative:  Draft:  Colour:

All day:

Start: 25/10/2018

End: 25/10/2018

Bookings:

Description:

Notes:

Cancel Save

## The calendar screen

The bookings will then appear in the calendar.

Note: By default, when booking across non-working days and weekends these days remain unbooked. If you wish to specifically create a booking on a non-working day, you must drop the item directly on the non-working day.

Calendar bookings My calendar

My calendar - Add event >>

Calendar

today < >

Oct 22 - 28, 2018

	Mon - Oct 22	Tue - Oct 23	Wed - Oct 24	Thu - Oct 25	Fri - Oct 26
all-day				Holidays - 2018 - HO500	Holidays - 2018 - HO500
09:00	09:00 - 12:00 Design - au00565.002	09:00 - 14:00 Television ad - Winter campaign - au04556.001 - 5			
09:30	- 3 hours				

## Amending or deleting a booking

To amend or delete a series of bookings, click the 'Edit' button

Calendar booking

Internal

16/HO50026 Holidays

001 Holidays - 2018

Mike Pender: Holiday

Status

Handler: Mike Pender

Colour:

Booked 9:00 AM - 5:30 PM All Day

All day

Time entered 0 hrs

Total entered for 5 day event 0 hrs

Quick timesheet Full timesheet Edit

Notes

Requisition

Attachments

Edit event

## Setting up charge-codes for the MyCalendar 'Add event' feature

Only special charge-codes are available for this feature. You should only create a limited selection of these since they all appear at the top of the calendar.

### Charge-code for booking into MyCalendar

Create a charge-code (or use an existing one) and select the following fields:

- Select '[ ] Book from MyCalendar'
- Select 'Event type' ('holiday' or 'other')
- Typically set this as an 'Out of office' charge code
- Select internal jobs

Charge codes Cancel  Save & Close  Delete  < >

Details   Resource skills   Team skills   Client prices/costs

**Details**

Charge code: 16/HOL  
Description: Holiday  
 Inactive  
 Inactive on timesheet

**Rates**

Set a cost rate on this charge code  
Charge rate: 0.0000  
Charge code type: - Blank -  
Department: - Blank -  
Quote detail: Quote detail  
 Suppress from calendar  
 Book from MyCalendar  
Event type: Holiday  
 This is an out of office charge code  
 Exclude from quote estimating  
Allowed on: Internal  
Estimate in: Hours  
Allocate new estimates to: - Blank -  
Estimate sort order: 0

### Creating a job to activate a special charge-code

You will then need to create a blank estimate on at least one job. This is necessary since every booking in Synergist must be allocated to a job phase.

**Note:** If you allocate the charge-code to more than one job, the user will have to select one of these when they create the booking.

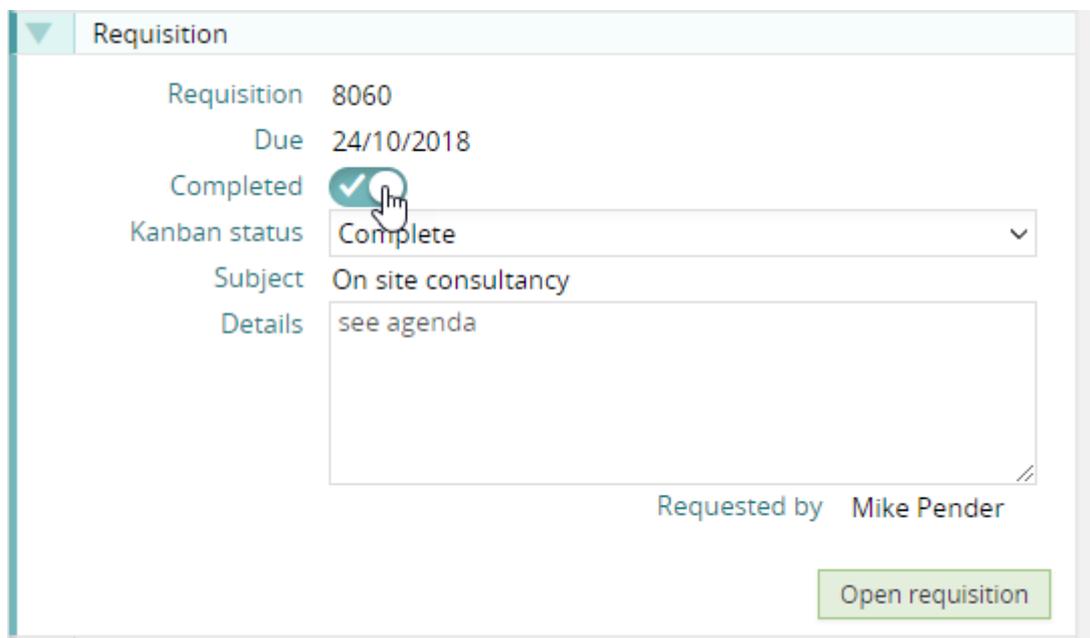
## Processing requisitions in MyCalendar

Users who have had work booked into their calendar via a requisition have the option to mark a requisition as completed. Obviously, a user should only do this if he/she is sure all the work related to the requisition is complete.

Kanban boards are now available in Synergist, so it is now important that not only are requisitions marked as completed – requisitions also need to be set to the correct Kanban status. To make this easier for users, this process is automatic. If a user marks a requisition as 'complete', the Kanban status is automatically updated. Similarly, if the user un-completes a requisition, the Kanban status is also adjusted.

However, for those who wish to use the Kanban system in a more sophisticated manner, it is possible to manually update the Kanban status from within MyCalendar.

For instance, you may have a workflow process that requires all work completed to go through a QA stage. If this were the case, a Kanban stage called 'QA' might be added to the workflow. On finishing their work, users would then set the Kanban stage of the requisition to 'QA' rather than simply completing the requisition.



The screenshot shows a 'Requisition' form with the following fields and values:

- Requisition: 8060
- Due: 24/10/2018
- Completed:  (A mouse cursor is pointing at this checkbox)
- Kanban status: Complete (dropdown menu)
- Subject: On site consultancy
- Details: see agenda (text area)

At the bottom right of the form, it says 'Requested by Mike Pender' and there is a green button labeled 'Open requisition'.

## User access rights - MyCalendar

Under 'Access', 'Miscellaneous access' there is a section labelled 'My calendar admin level'. The option selected defines what the user can do in MyCalendar. This includes allowing access to the new 'Add event' feature described above.

- None (default)
  - Users can view bookings, add calendar booking description & notes, and set the feedback flags
- Amend booking colour
  - As above, but users can also set the colour of a booking (which changes the booking colour in the main calendar booking screen).
- Create special events
  - Users can add holidays and some other events into MyCalendar (which will also appear in the main calendar as tentative bookings).
- Create special events and amend booking colour
  - As above, but users can also change booking colours.

Miscellaneous access

- User can create/edit quotes
- Views administrator
- User can delete revisions

Calendar admin level: None

My calendar admin level: Create special events

Dashboard access

None

Amend booking colour

**Create special events**

Create special events but not amend booking colour

## Booking descriptions

Bookings display, by default, the client name, job number & hours booked. Previously this only showed the client name.

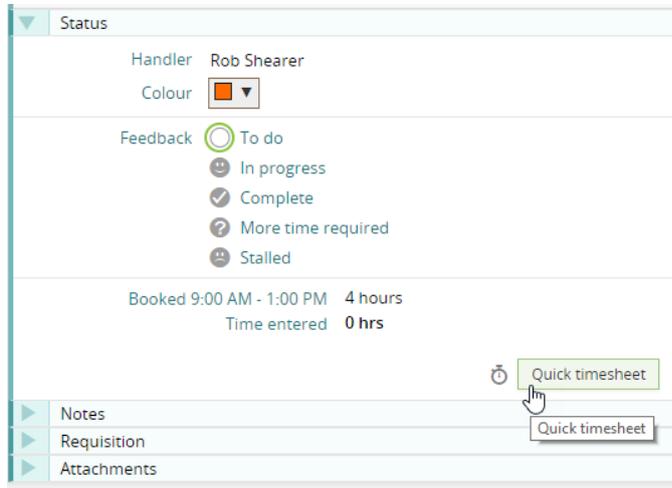
**Note:** The booking description can be changed to a different build – but only if the user has access to Calendar bookings. In a future release, this feature will be available to MyCalendar users.

## Quick timesheet

The 'Quick timesheet' feature of MyCalendar enables several actions with a single click.

Previously users were required to mark bookings as either complete or stalled. They would then update the status of the related requisition, and then post a timesheet. The new Quick timesheet functionality makes this process much easier.

### Quick timesheet button

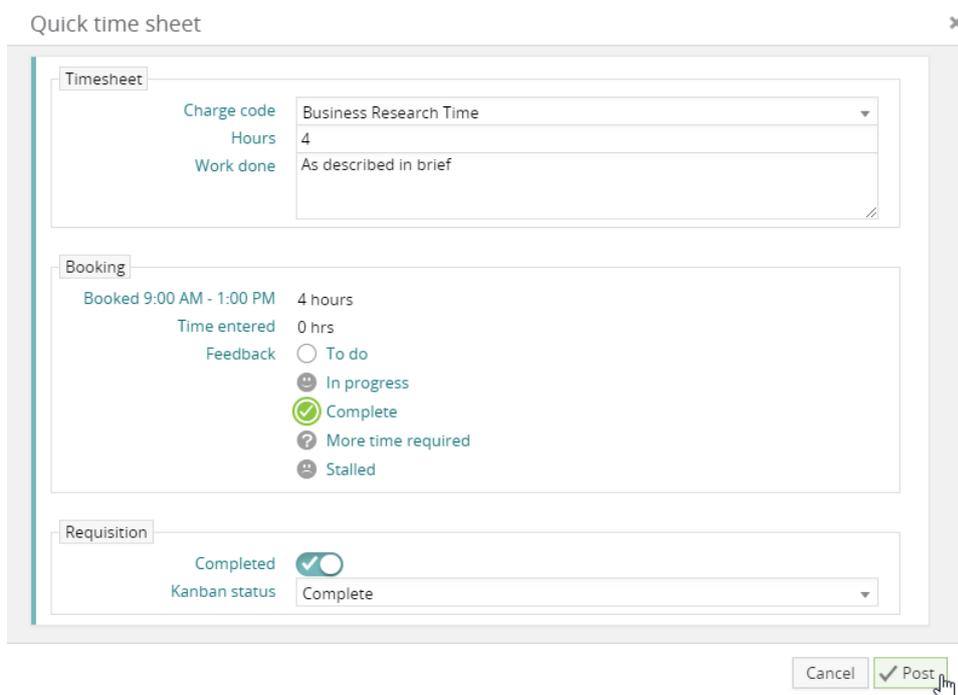


The screenshot shows a booking card with the following details:

- Status:** Handler: Rob Shearer, Colour: [Orange]
- Feedback:** Radio buttons for To do (selected), In progress, Complete, More time required, and Stalled.
- Booking Info:** Booked 9:00 AM - 1:00 PM, 4 hours, Time entered: 0 hrs.
- Buttons:** A 'Quick timesheet' button with a clock icon is visible, with a tooltip also showing 'Quick timesheet'.
- Other sections:** Notes, Requisition, and Attachments are listed at the bottom.

### Features

- The user creates a timesheet for the remaining hours of the booking.  
**Note:** timesheets created this way are automatically submitted/posted.
- The feedback status can be set to complete / stalled etc.
- If this booking came via a requisition, the user can mark the requisition as completed. The Kanban stage is automatically adjusted or set by the user.



The 'Quick time sheet' dialog box contains the following sections:

- Timesheet:** Charge code: Business Research Time, Hours: 4, Work done: As described in brief.
- Booking:** Booked 9:00 AM - 1:00 PM, 4 hours, Time entered: 0 hrs, Feedback: Radio buttons for To do, In progress, Complete (selected), More time required, and Stalled.
- Requisition:** Completed: [Checked], Kanban status: Complete.

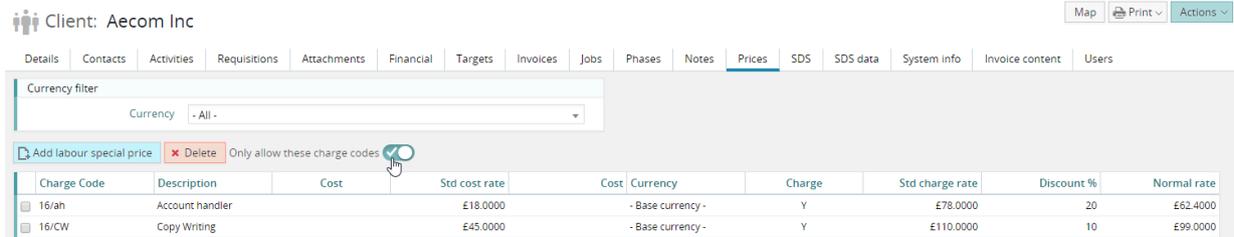
Buttons at the bottom: Cancel, Post (with a checkmark icon).

# Clients. Prospects & Leads

## Client prices

This is an optional feature to force all jobs for a client to exclusively use client prices. Previously, charge rates could be overridden but not excluded.

In this example, this client has just two specific client prices. The user has chosen the option 'Only allow these charge codes'.



Client: Aecom Inc

Map Print Actions

Details Contacts Activities Requisitions Attachments Financial Targets Invoices Jobs Phases Notes Prices SDS SDS data System info Invoice content Users

Currency filter: Currency - All -

Add labour special price Delete Only allow these charge codes

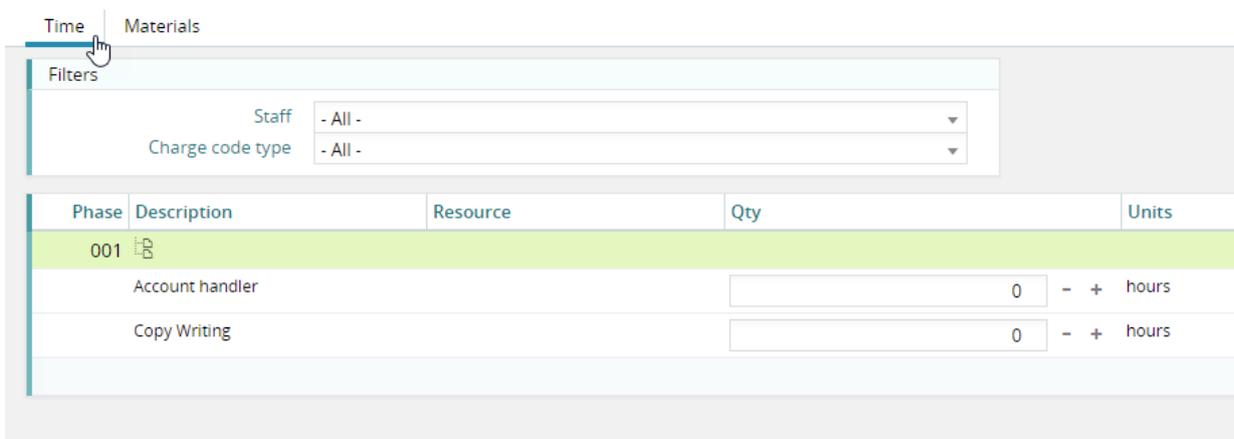
Charge Code	Description	Cost	Std cost rate	Cost	Currency	Charge	Std charge rate	Discount %	Normal rate
16/ah	Account handler		£18.0000		- Base currency -	Y	£78.0000	20	£62.4000
16/CW	Copy Writing		£45.0000		- Base currency -	Y	£110.0000	10	£99.0000

## Quick estimate for this client

When creating an estimate for this client, only the special charge codes can be selected.

### Quick estimate

Aecom Inc 16/AQ50035 Consultancy



Time Materials

Filters

Staff: - All -

Charge code type: - All -

Phase	Description	Resource	Qty	Units
001	Account handler		0	hours
	Copy Writing		0	hours

## Social media

Fields are available on the client details page for storing social media info for each client.



Social media

Facebook: link.ace.91085

Twitter:

LinkedIn:

Skype: axc100

## Leads

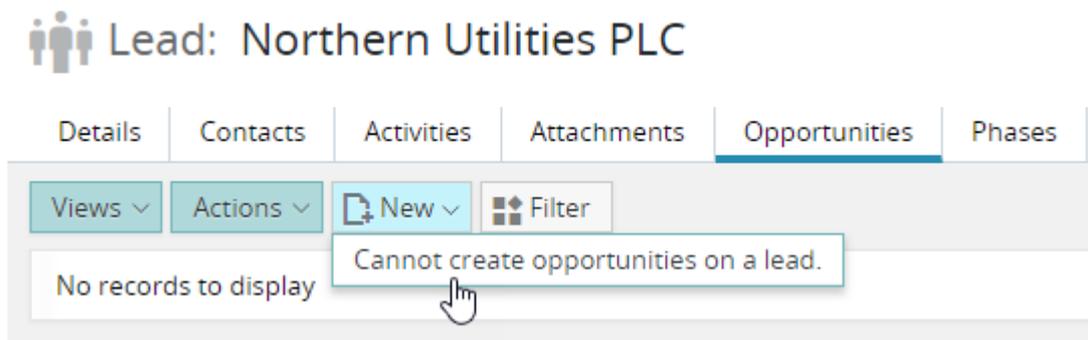
Leads are now supported in the Synergist Web/Cloud UI.

**Note:** Users who are changing from the desktop UI of Synergist will notice some differences in the interface with the Web/Cloud UI. In the Web/Cloud UI, leads are organization-based and do not require a contact record.

### Definition:

A client (Organization) record can be set to one of three main statuses:

- **Lead**  
A lead is a potential client. At this status, no final vetting has been completed, so no opportunities are allowed to be created for this organization until it has been promoted to a Prospect. However, 'Activities' can be created for Leads.

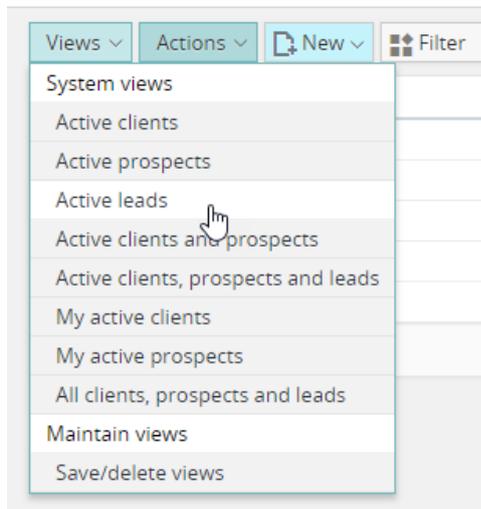


- **Prospect**  
Similar to a Lead but the organization has been qualified and it is therefore possible to create opportunities ('Quote' status jobs) and quote documents. It may be possible to even post costs to an opportunity – this is dependent on company settings.
- **Client**
  - Once promoted to a Client, live jobs can be created for this organization.

## New view – active leads

An additional standard view has been added to the client list - 'Active Leads'

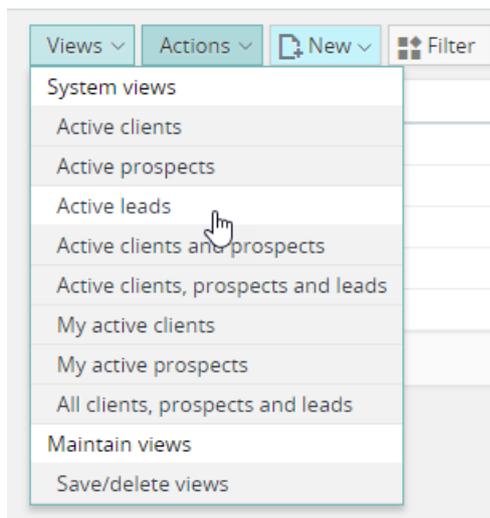
### Client list - Active leads



## Creating a lead

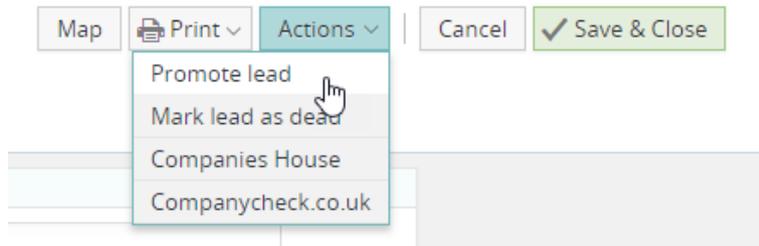
You can now create a 'Lead' from the main client lists. You can also add one or more contacts to a Lead – similar to the features available for 'Prospects'.

### Client list - Active leads

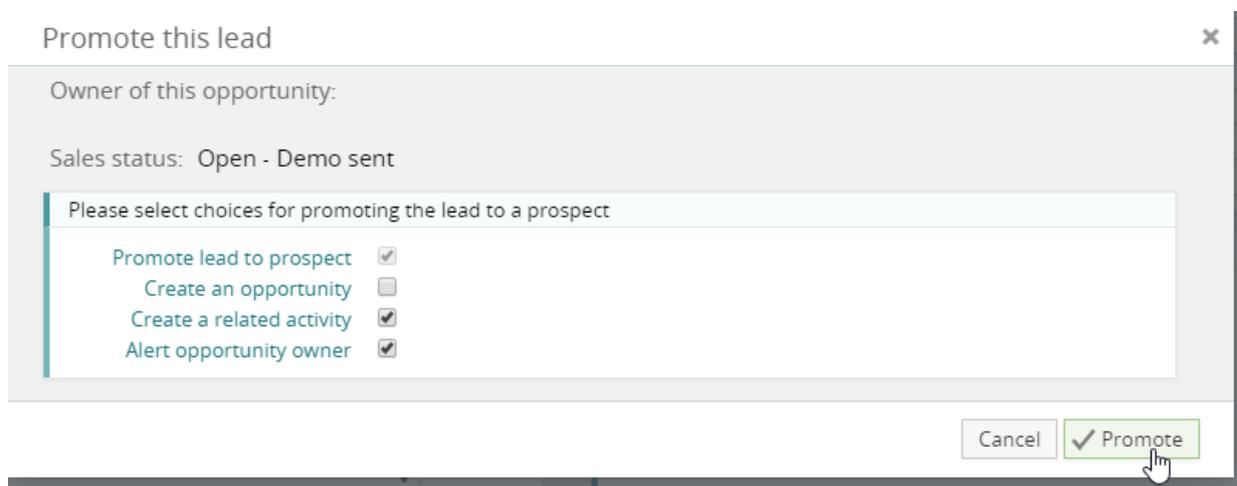


## Promoting a lead

You can promote a Lead to a Prospect using the actions button on the organization record.

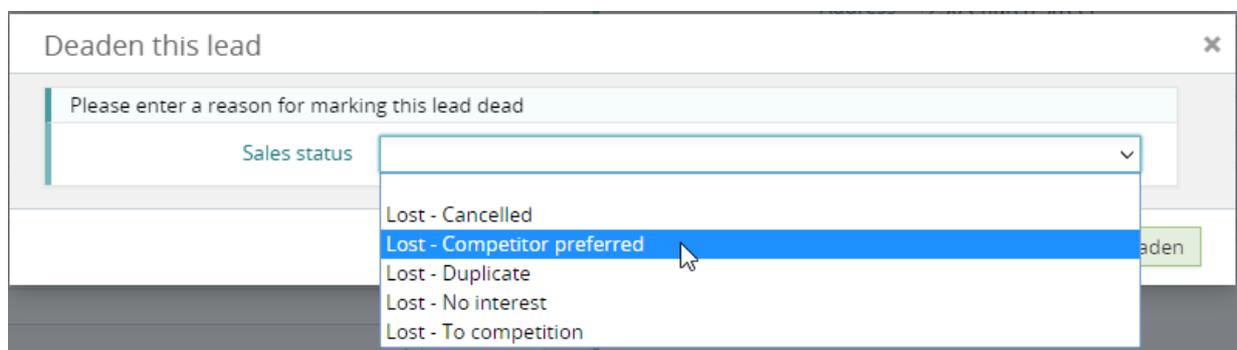


You will then see a dialog where you can specify whether you wish for an automatic activity and opportunity record to be created.



## Deadenning a Lead

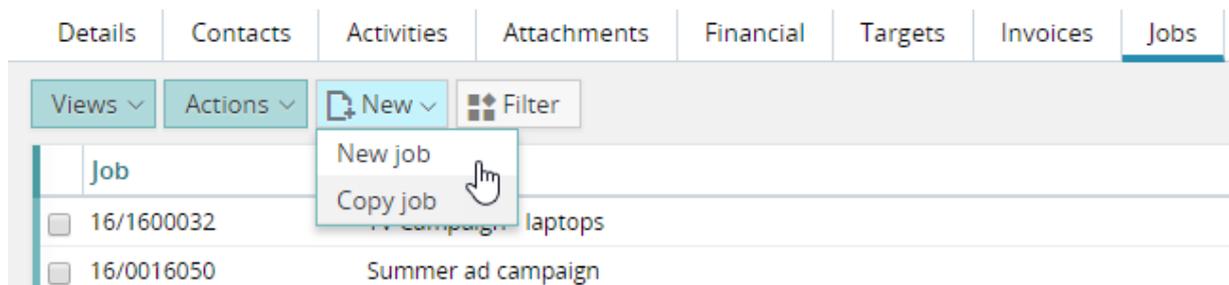
You can also deaden a lead and, if required, resurrect a deadened lead. When doing this process you have the opportunity to select a sales status.



## Creating a job from client record

This is now an available option. You can also copy a job from the client record jobs list.

### Client: Ace Electronics



Details | Contacts | Activities | Attachments | Financial | Targets | Invoices | **Jobs**

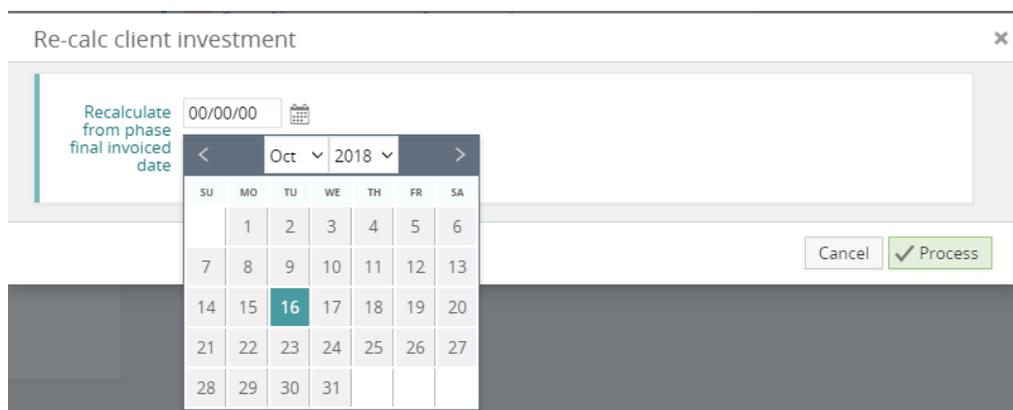
Views ▾ | Actions ▾ | New ▾ | Filter

Job

- 16/1600032 ... laptops
- 16/0016050 ... Summer ad campaign

## Recalculating client investment

This is available via the 'utilities' pre-process section.



Re-calc client investment

Recalculate from phase final invoiced date

00/00/00

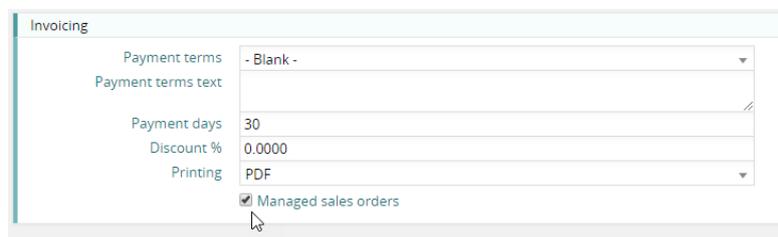
Oct 2018

SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Cancel | Process

## Managed sales orders

This is a feature not previously available in the Web/Cloud UI. If it is available in your system, the feature can be activated for a client, in the financial tab of the client record.



Invoicing

Payment terms: - Blank -

Payment terms text:

Payment days: 30

Discount %: 0.0000

Printing: PDF

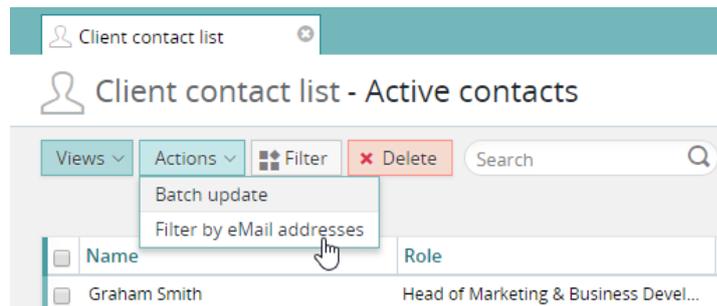
Managed sales orders

Once activated for a client, any jobs for the client will have an additional tab 'Client SOs' (Client sales orders), as will the client record.

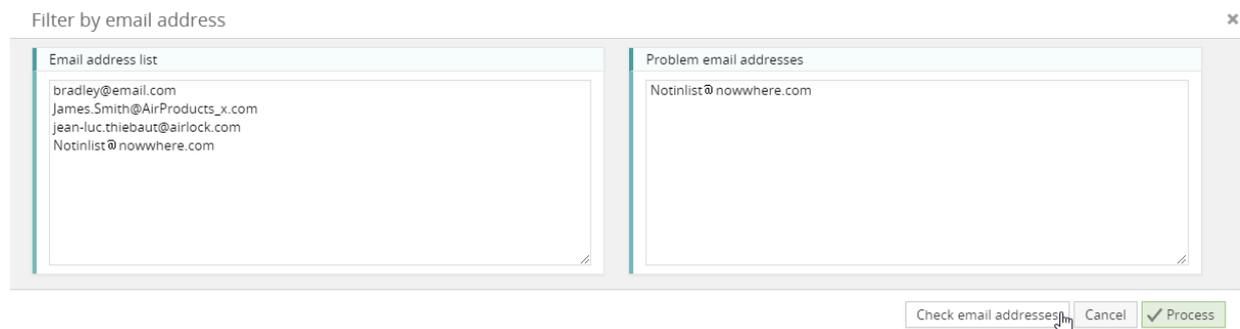
With this feature, it is possible to allocate a single 'Client sales order' across multiple jobs and invoices. It is also possible to allocate multiple Sales orders to a single job.

# Client contacts

## Filter by email addresses

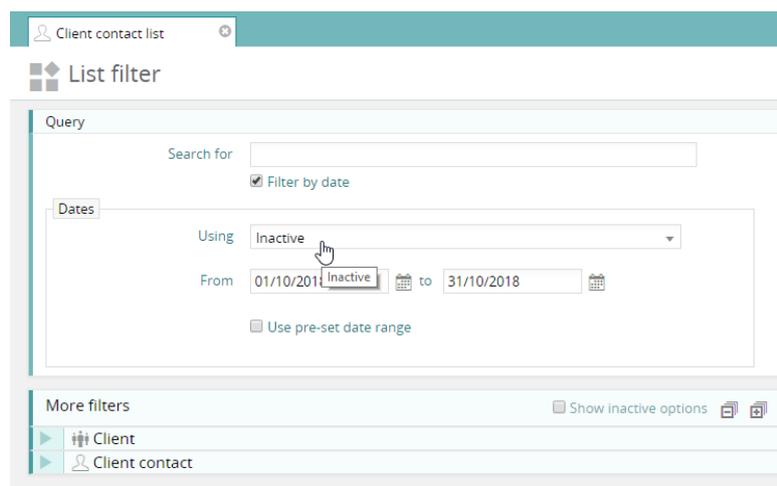


This useful feature has been enhanced. We now have a 'Check email addresses' button. On clicking, the system will list any missing email addresses in the right hand window.



## Inactive date filter

To help manage GDPR issues it is now possible to filter the client contacts list by 'Inactive date'. Typically, this feature is used to identify contacts that have been set inactive and have remained so for a certain period. At that point, personal details could be cleared down (e.g. social media account names, cell phone numbers etc.).



## Client contact - job & phases tabs

Job and phase tabs have been added to client contacts.

### Client contact: Steve Daily

Details | Roles/functions | Notes/privacy | Activities | Attachments | Invoices | **Jobs** | Phases

Views  Filter

Job	Description
<input type="checkbox"/> 16/1600001	Xmac game design

Rows per page 16  1-1 of 1

# Criteria & views

## Saving a view – creating a tab

You will find a new option in the 'Save view' dialog. If you check the check-box 'Place on own tab' the view you are saving will not only appear as a new view, it will also create a **new tab** on the following data input forms:

- Client
- Job
- Phase
- Supplier

## Save view dialog

Views save

Save current view for: Company

Name	Default	Own tab
Design partners view		X
Doc folders		X

View name: Requisitions

Make this the default view for the company

Place on own tab

Cancel Save

## New tab appears

The 'Requisitions' view now appears as a tab on the job card.

Job ITV Ad - concept

ZZ Acme company

Details Financial Invoices Billing plan Phases Estimate Phase quotes Pending Activities **Requisitions** Attachments

New Delete List Kanban

Phase	Type	Contact	Description/Comments	Created	Att	Due
001	Requisition		Artwork required	14/03/2018 10:40...	2	14/03/2018 8:00

Rows per page: 16 1-1 of 1

Notice that it has also appeared on the client card.

Client: ZZ Acme company

Details Contacts Activities **Requisitions** Attachments Financial Targets Invoices

Actions New Delete

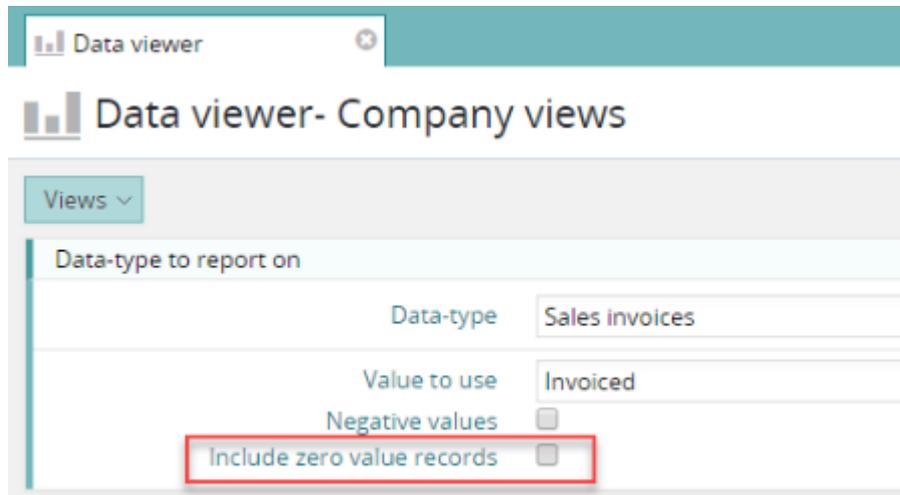
Job/Phase	Type	Contact	Description/Comments
16/1600025.001	Requisition		Artwork required

Rows per page: 16 1-1 of 1

# Data viewer

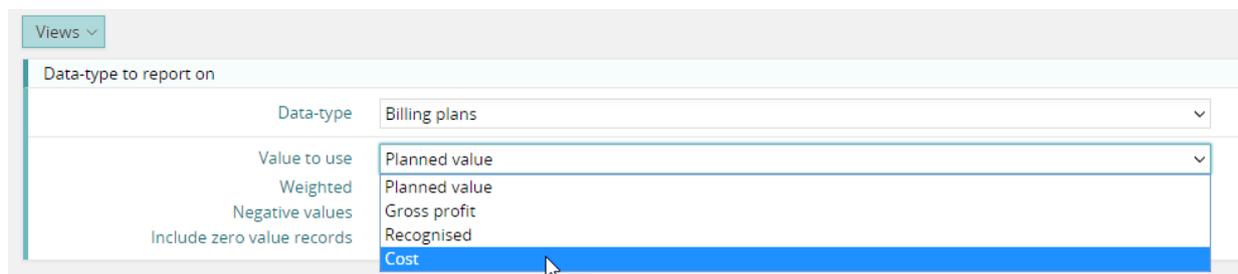
## Include zero value records

By default, the Data Viewer only ever returns data that is present and does not accumulate values that are zero, to avoid getting surplus summarised rows. In some cases where the user wishes to summarize at a high level, there may be a use for zero values. This feature has been added to the Data viewer.



## Reporting on billing plans

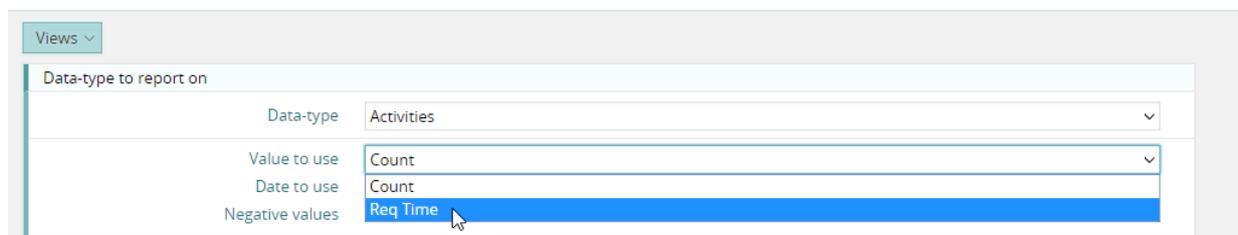
For billing plans, there is a new option for value choice - Cost.



## Requisitions

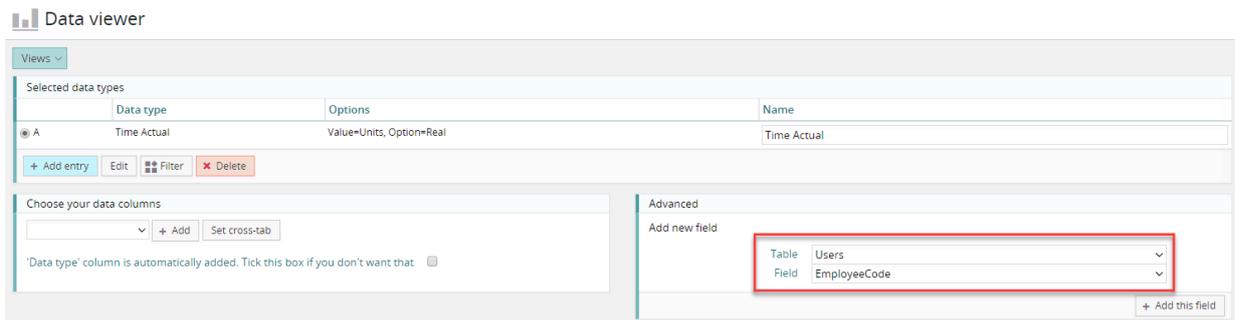
If reporting on requisitions – the hours requested can be output in the data viewer.

### Data viewer- Company views



## Fields from more tables available to add

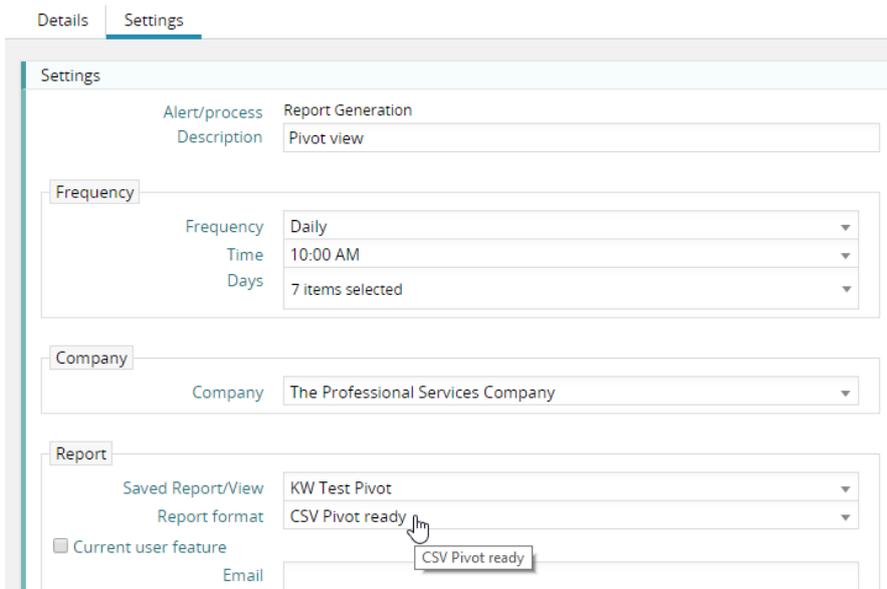
You can now add fields from the Project, Sub-Project/Campaign, Staff Resource and User tables. The tables available will depend on which data type(s) you are including in your query.



## Pivot-ready output for Data Viewer scheduled events

Added as an option to the scheduler to specify CSV Pivot-ready output.

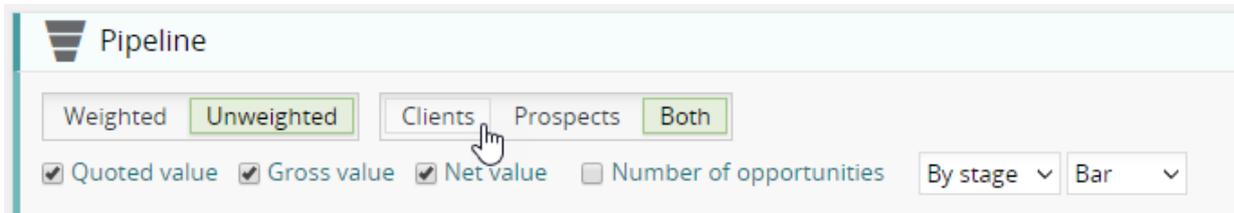
### Scheduler



# Dashboards

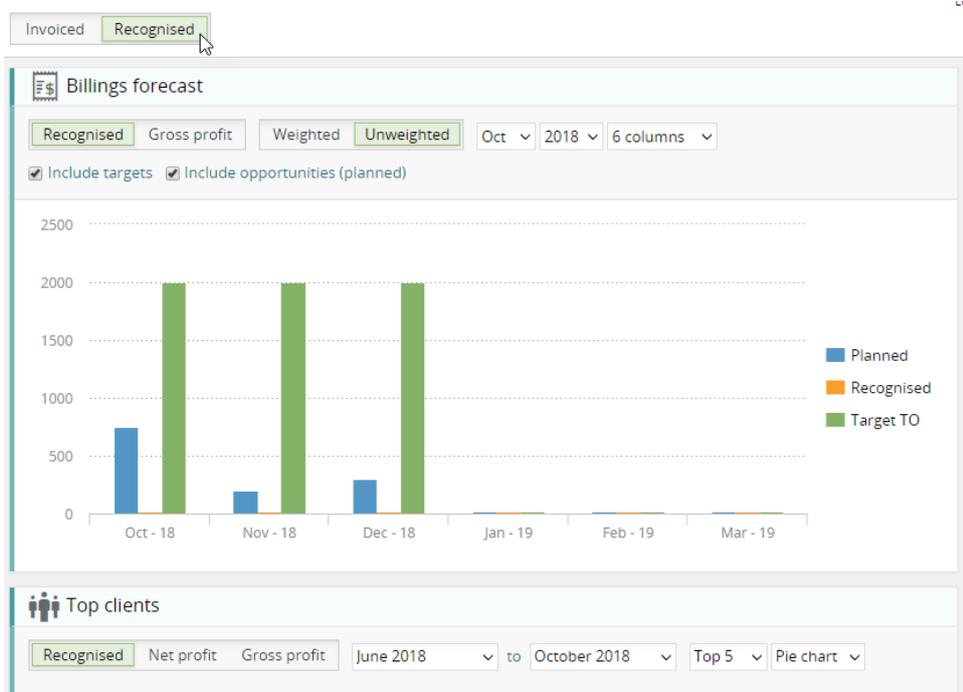
## Pipeline

The Pipeline can now be filtered by clients / prospects.



## Revenue recognition

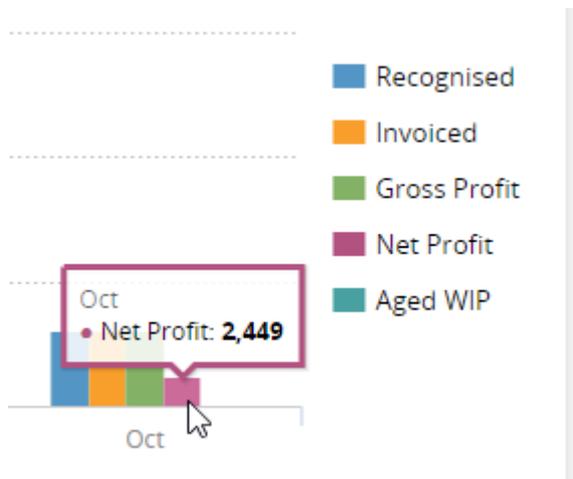
For clients using revenue management, the dashboards can now show both invoiced and recognised financial data.



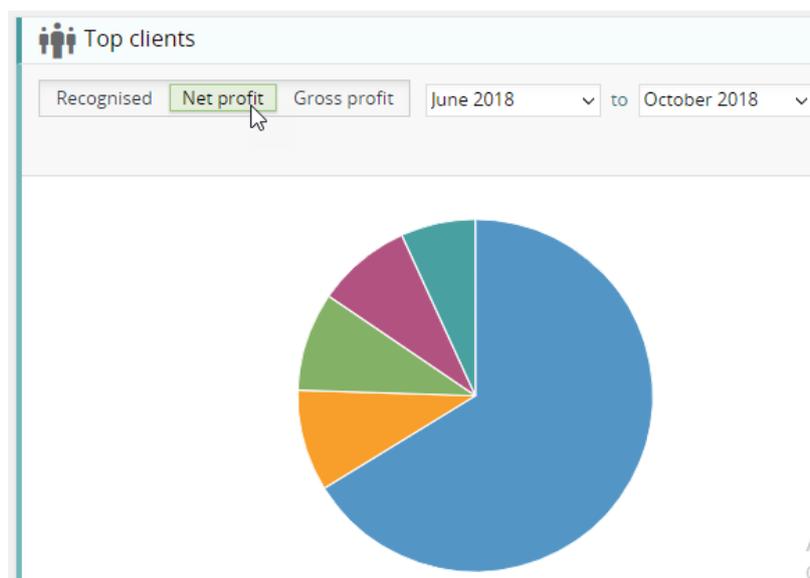
## Net profit

Net profit is now supported in the dashboards.

### Financial summary



### Top clients



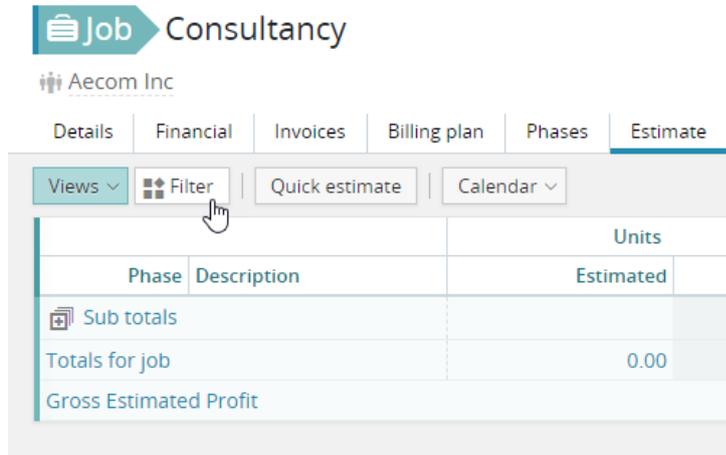
## Saving dashboard views

If a user selects/unselects checkboxes, or sets the button states to provide a required view, the next time the user logs in he/she will see the same dashboard views. One exception to this is the date selections. Dates always return to the default state since they are designed to follow the current week/month.

# Estimating

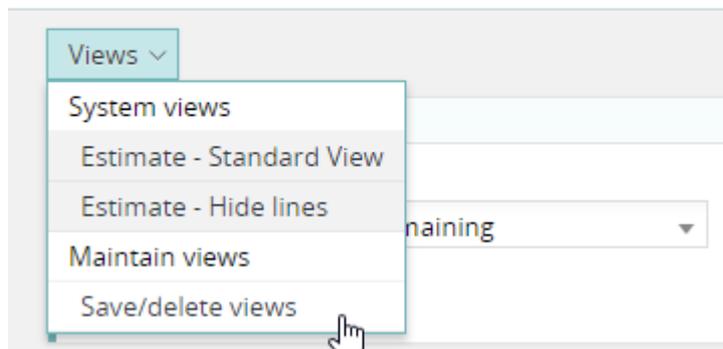
## Creating estimate views

You can save estimate filter settings as a view. Click on the filter button, and select the settings you require.



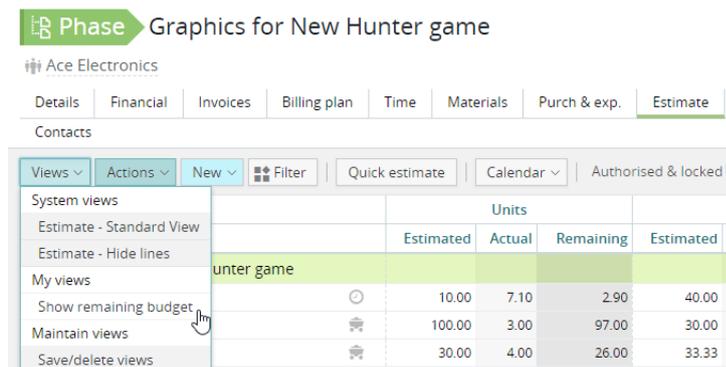
You can then save the settings as a view. If you are a views administrator you can create a company view (for all users to share), otherwise create a personal view for yourself.

## Estimate view options



## Selecting a view

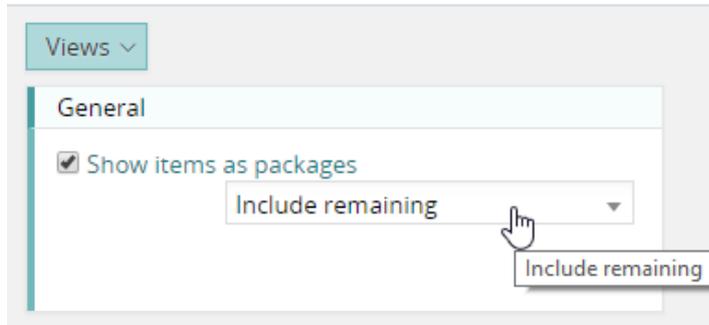
To select a saved view, simply click the 'Views' button



## Option to show remaining budget

This feature is switched on by selecting 'Include remaining' in the filter. You should save a view with this setting to make it easier to select this view of the estimate (see above).

### Estimate view options



### The estimate screen

Now it is possible to see the remaining budget (estimated less actuals). Notice there is also a new summary area at the bottom of the screen. From here, you can see the total remaining budget for this job/phase broken down by time, materials & purchases.

Phase Graphics for New Hunter game

Ace Electronics

Print Export Phase Actions Cancel Save & Close

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

Contacts

Views Actions New Filter Quick estimate Calendar Authorised & locked Actual to estimated cost 71%

Description	Units			Cost			Charge			Profit		Staff	P	Q	Opt
	Estimated	Actual	Remaining	Estimated	Actual	Remaining	Estimated	Actual	Remaining	Estimated					
Graphics for New Hunter game															
Alter	10.00	7.10	2.90	40.00	28.40	11.60	700.00	497.00	203.00	660.00	16/MP				
A3 Colour Copies	100.00	3.00	97.00	30.00	0.90	29.10	50.00	1.50	48.50	20.00					
Special widgets	30.00	4.00	26.00	33.33	4.44	28.89	66.67	8.89	57.78	33.34					
Subcontract Model Making				500.00	400.00	100.00	550.00	440.00	110.00	50.00					
Mileage				10.00	3.83	6.17		3.83	-3.83	-10.00					
Sub totals															
Totals for time	10.00	7.10	2.90	40.00	28.40	11.60	700.00	497.00	203.00	660.00	(94%)				
Totals for materials				63.33	5.34	57.99	116.67	10.39	106.28	53.34	(46%)				
Totals for purchases				510.00	403.83	106.17	550.00	443.83	106.17	40.00	(7%)				
Totals for phase	10.00	7.10	125.90	613.33	437.57	175.76	1366.67	951.22	415.45	753.34	(55%)				
Gross Estimated Profit										856.67	(63%)				

## Packages

For systems that are already using 'packages' (bill of materials), this feature is now available in the browser-based product. **Note:** This feature is not available in the cloud product.

# Expenses

## Expense lines – sorting

Expense lines can now be sorted by column heading.

Expense lines

#	Client	Job/Phase	Expense type	Description	Value	VAT	Date
<input type="checkbox"/>	2 A B Applications Ltd	3062.001	Travel	Travel	12.00	2.00	06/11/2018
<input type="checkbox"/>	1 Bassy Brewers	520.002	Miscellaneous	Miscellaneous	88.00	0.00	06/11/2018

## Copy an expense line

The user is able to select one or more lines from an existing sheet and copy (duplicate) the line(s).

Expense list    Nov expense sheet

**Expense sheet: 1847**

Expense account: Mike Pender  
Description: Nov expense sheet  
Date: 07/11/2018

Expense lines

Actions		Job/Phase	Expense type	Description
<input type="checkbox"/>	1 Ace Electronics	1600004.002	Electrical Work	Electrical Work
<input checked="" type="checkbox"/>	2 Ace Electronics	1600004.002	Electrical Work	Electrical Work

If the source sheet is a submitted sheet, the copied line is added to an existing un-submitted sheet. If no un-submitted sheet exists, a new sheet is created.

If the source sheet is un-submitted – the line will be duplicate to the same un-submitted sheet.

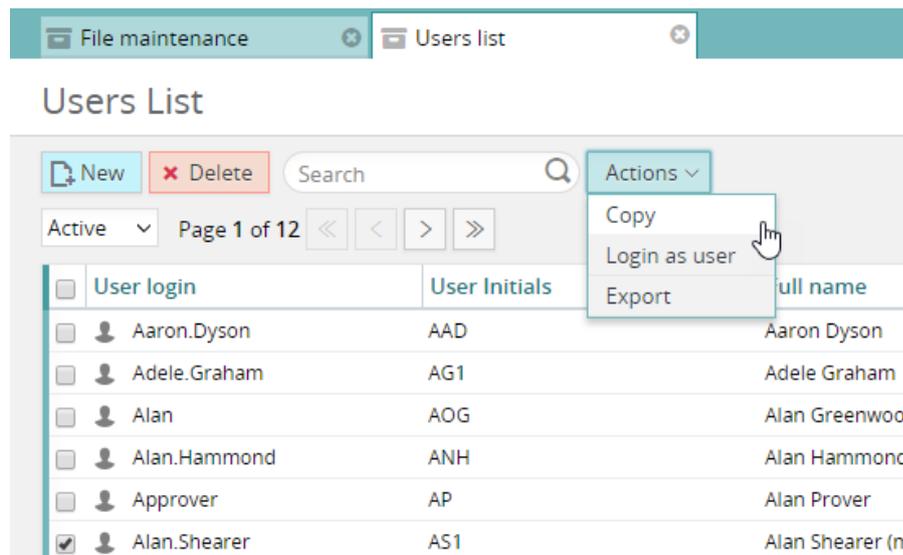
# File maintenance

## User table

### Copy user

The copy user feature will copy key settings from the source user:

- Approval settings
- Permissions
- Access rights
- Licensing groups / modules
- Company access and teams

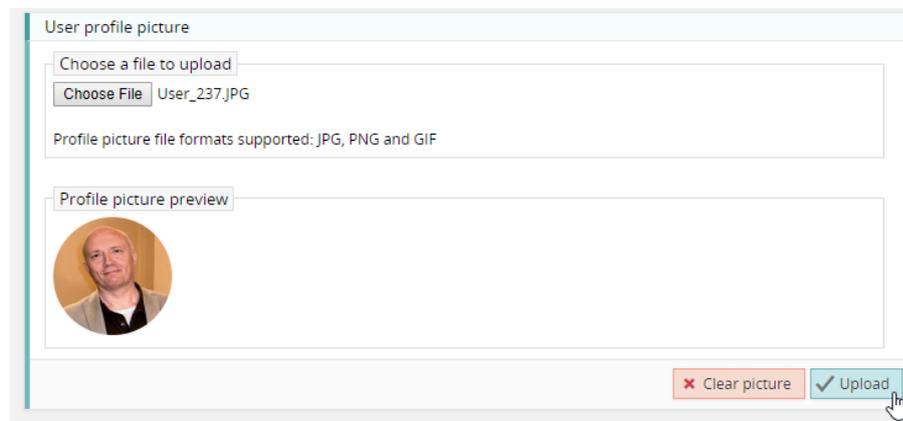


The screenshot shows the 'Users List' interface. At the top, there are tabs for 'File maintenance' and 'Users list'. Below the tabs, there is a search bar and a table of users. The table has columns for 'User login', 'User Initials', and 'Full name'. An 'Actions' dropdown menu is open over the table, showing options: 'Copy', 'Login as user', and 'Export'. A mouse cursor is pointing at the 'Copy' option.

	User login	User Initials	Full name
<input type="checkbox"/>	Aaron.Dyson	AAD	Aaron Dyson
<input type="checkbox"/>	Adele.Graham	AG1	Adele Graham
<input type="checkbox"/>	Alan	AOG	Alan Greenwood
<input type="checkbox"/>	Alan.Hammond	ANH	Alan Hammond
<input type="checkbox"/>	Approver	AP	Alan Prover
<input checked="" type="checkbox"/>	Alan.Shearer	AS1	Alan Shearer (m

### Add avatar

The administrator can now add an avatar on behalf of a user from the details tab of the user record.



The screenshot shows the 'User profile picture' upload interface. It includes a 'Choose a file to upload' section with a 'Choose File' button and the filename 'User\_237.JPG'. Below this, it states 'Profile picture file formats supported: JPG, PNG and GIF'. There is a 'Profile picture preview' section showing a circular image of a man's face. At the bottom right, there are two buttons: 'Clear picture' (with a red 'x' icon) and 'Upload' (with a green checkmark icon). A mouse cursor is pointing at the 'Upload' button.

## Control of currency exchange rate override

This is a user setting to allow control as to whether a user is able to change a currency exchange rate.

The setting affects the following:

- Jobs (including Opportunities)
- Sales Invoices/Credits
- Purchase Orders
- Direct Expenses
- Expense lines

Financial restrictions

Do not allow user to edit tick-off on invoices

Allow invoicing of final invoiced phases

Allow BP locking

Exchange rate overrides

Jobs x Sales Invoices x Purchase Orders x Expenses x

## New system setting to define default access for new users

Previously, when a new user was created, the new user was always given access to all current companies by default. A new system setting has been provided to override this default behavior.

### Setting appears under 'System parameters'

Passwords/Access

Password minimum length	4
Minimum uppercase	0
Minimum lowercase	0
Minimum numeric	0
Minimum punctuation	0
Expiry duration (days)	0

Default no company access for new users

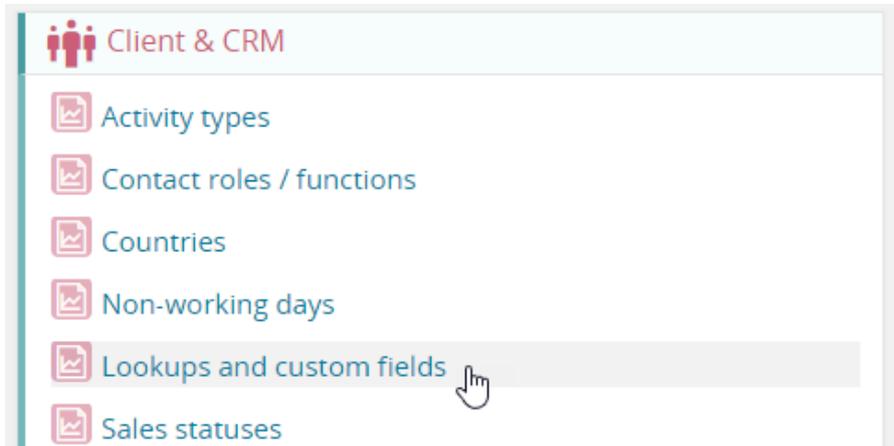
# Invoicing

## Custom fields

The use of custom fields is now supported for sales invoices.

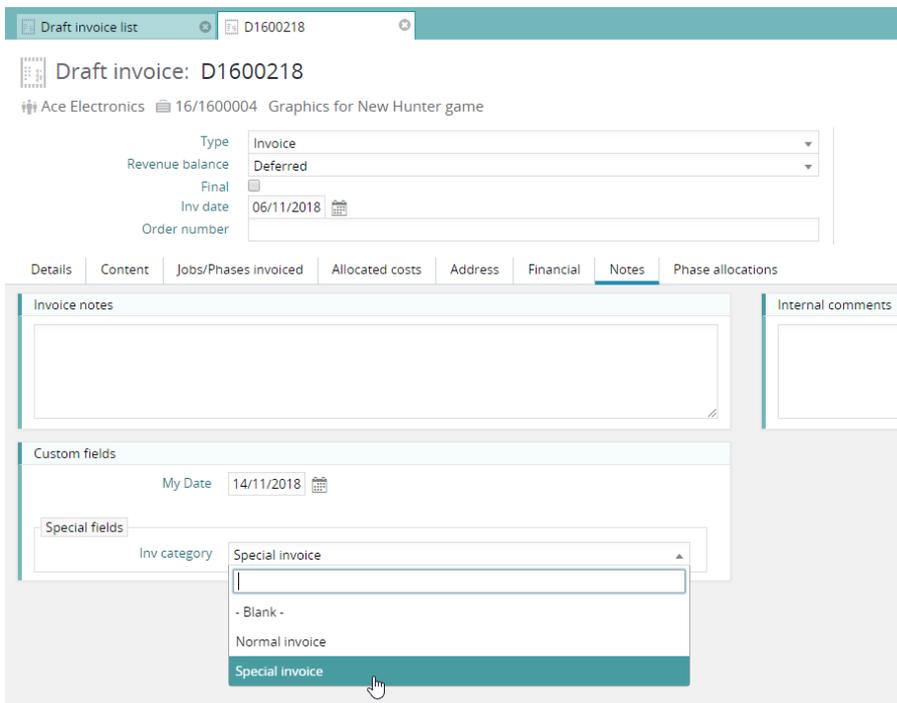
### FM

To set up custom fields for invoices you will need access rights to the File Maintenance section of the product



## Notes tab

Custom fields appear on the Notes tab of each draft/real invoice.

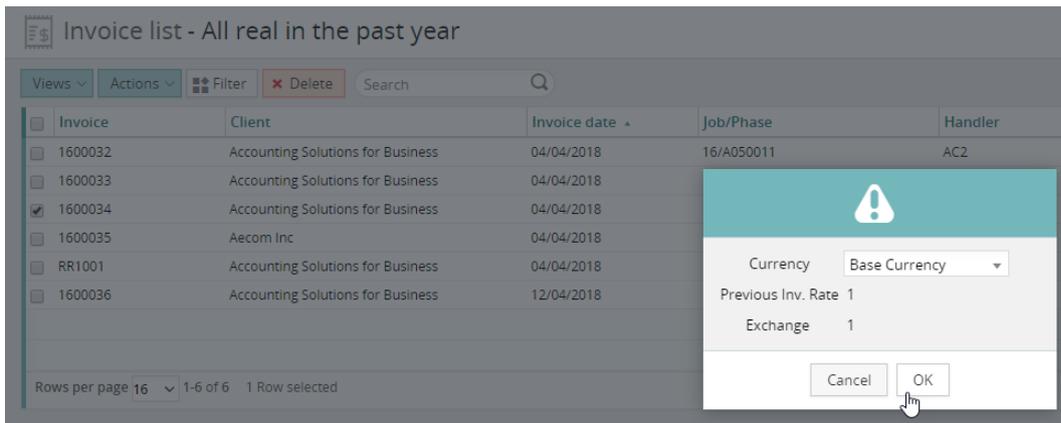


## Searching

You are able to filter the invoice lists based on custom fields.

## Repeat invoice

The user is offered a dialog on repeating an invoice to establish the currency and exchange rate to use for the new invoice.



The screenshot shows a web application interface for managing invoices. The main window is titled "Invoice list - All real in the past year". It features a table with columns for Invoice, Client, Invoice date, Job/Phase, and Handler. A dialog box is open over the table, displaying a warning icon and the following fields: Currency (Base Currency), Previous Inv. Rate (1), and Exchange (1). The dialog has "Cancel" and "OK" buttons.

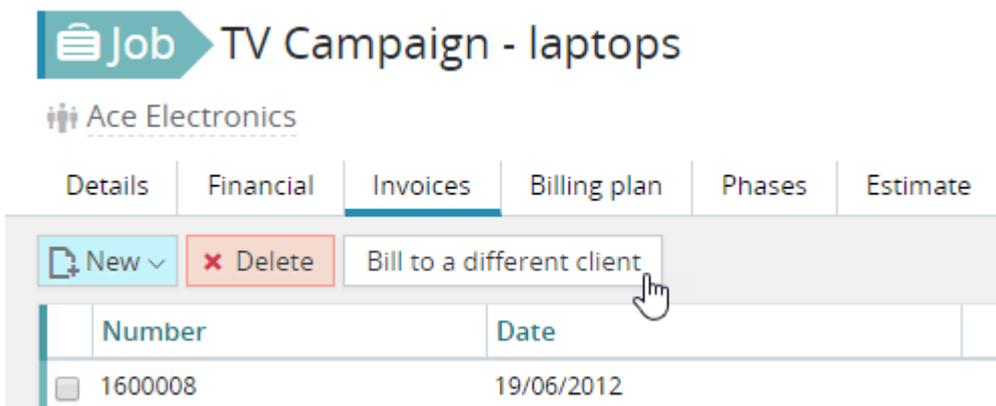
Invoice	Client	Invoice date	Job/Phase	Handler
<input type="checkbox"/> 1600032	Accounting Solutions for Business	04/04/2018	16/A050011	AC2
<input type="checkbox"/> 1600033	Accounting Solutions for Business	04/04/2018		
<input checked="" type="checkbox"/> 1600034	Accounting Solutions for Business	04/04/2018		
<input type="checkbox"/> 1600035	Aecom Inc	04/04/2018		
<input type="checkbox"/> RR1001	Accounting Solutions for Business	04/04/2018		
<input type="checkbox"/> 1600036	Accounting Solutions for Business	12/04/2018		

## Bill-to-client

This feature enables the user to invoice a client other than the client that the job belongs to.

The user can specify the client that future invoices should be billed to by default. This is set up on the Invoices tab of a job.

## Invoices tab of job

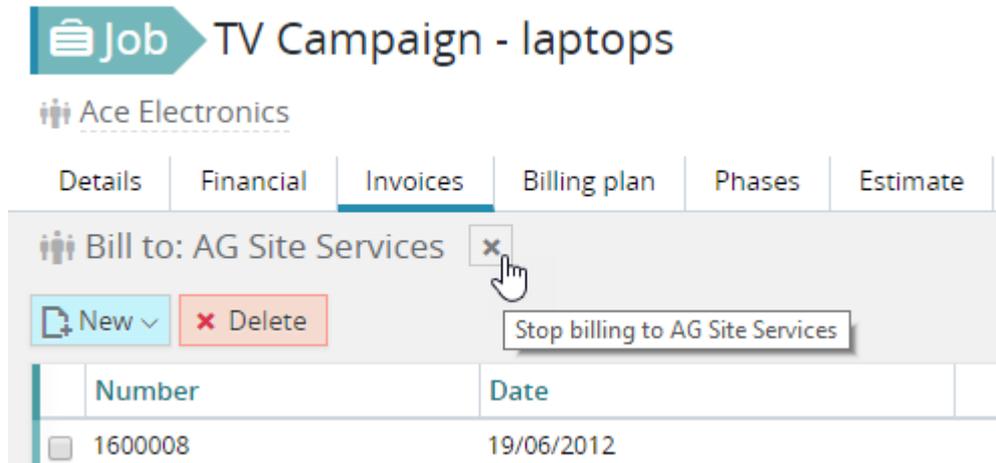


The screenshot shows the "Invoices" tab for a job titled "TV Campaign - laptops" under the client "Ace Electronics". The interface includes tabs for Details, Financial, Invoices, Billing plan, Phases, and Estimate. A "Bill to a different client" button is highlighted. Below the tabs is a table with columns for Number and Date.

Number	Date
<input type="checkbox"/> 1600008	19/06/2012

## Bill to a different client selected

In this example, all invoices for this job are to be raised against 'AG Site Services'.



**Job TV Campaign - laptops**

Ace Electronics

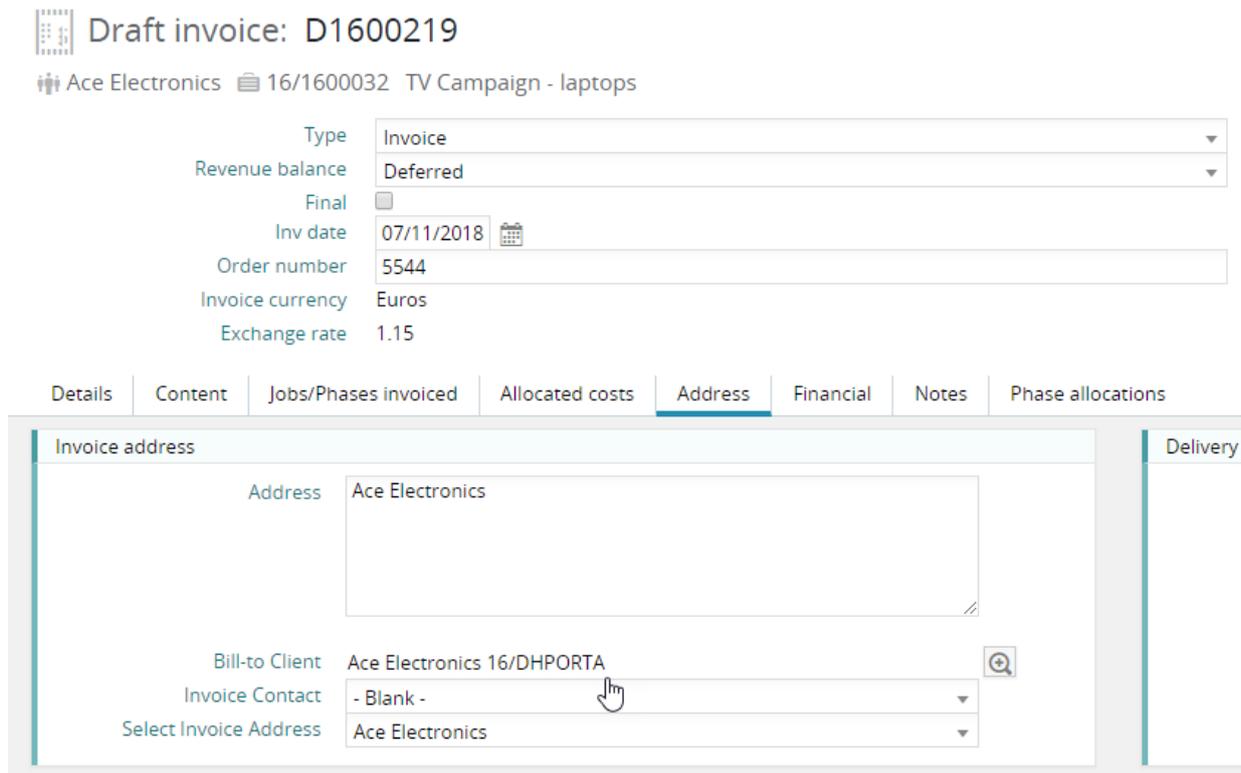
Details | Financial | **Invoices** | Billing plan | Phases | Estimate

Bill to: AG Site Services

Number	Date
<input type="checkbox"/> 1600008	19/06/2012

## Address tab of the invoice

The 'bill-to' client is displayed on the Address tab of each invoice. If this invoice is still in draft form, this can be changed to a different client as required.



**Draft invoice: D1600219**

Ace Electronics 16/1600032 TV Campaign - laptops

Type: Invoice  
Revenue balance: Deferred  
Final:   
Inv date: 07/11/2018  
Order number: 5544  
Invoice currency: Euros  
Exchange rate: 1.15

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

Invoice address

Address: Ace Electronics

Bill-to Client: Ace Electronics 16/DHPORTA

Invoice Contact: - Blank -

Select Invoice Address: Ace Electronics

Delivery

## Overriding the default VAT value

In this example, the VAT has defaulted to code 1 - 20%. While this invoice line is in this state, any changes to the Net total will automatically calculate the VAT at 20%.

Details   Content   Jobs/Phases invoiced   Allocated costs   Address   Financial   Notes   Phase allocations										
Actions ▾										
Description	Quant...	Unit price	Net total	VAT	VAT amo...	Gross total	Nominal	Style		
Services	0	0.0000	100.00	1 (UK ...)	20.00	120.00	+EC+16000	B   <i>i</i>   <u>u</u>		✕
	EUR	0.0000	115.00		23.00	138.00				
Totals			100.00		20.00	120.00				
EUR			115.00		23.00	138.00				

The user has now toggled the override switch and changed the VAT value. It is now no longer synched to be 20% of the Net total.

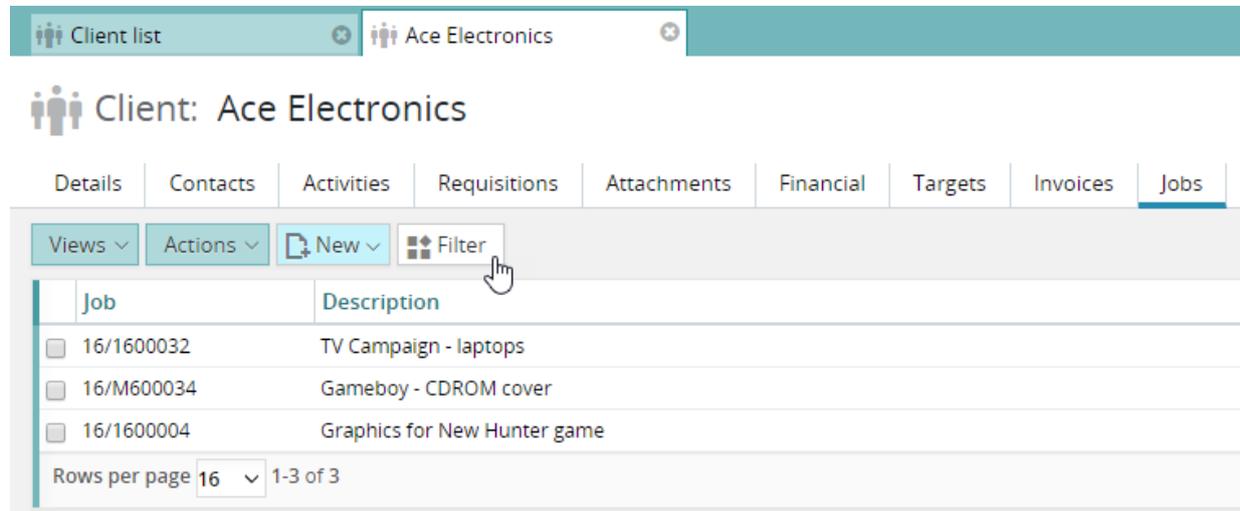
Details   Content   Jobs/Phases invoiced   Allocated costs   Address   Financial   Notes   Phase allocations										
Actions ▾										
Description	Quant...	Unit price	Net total	VAT	VAT amo...	Gross total	Nominal	Style		
Services	0	0.0000	100.00	1 (UK ...)	10.00	110.00	+EC+16000	B   <i>i</i>   <u>u</u>		✕
	EUR	0.0000	115.00		11.50	126.50				
Totals			100.00		10.00	110.00				
EUR			115.00		11.50	126.50				

## Multi-job invoices

A general enhancement to the client card: filter. This new feature will help users who invoice multiple jobs on the same invoice.

### Filter button

By clicking this button, the user can filter the list of jobs/phases. For example, he/she may wish to filter the list of jobs displayed so that only un-invoiced jobs for a specific project are included. It is then easy to select the required jobs for a multi-job invoice.



The screenshot shows the client card for 'Ace Electronics'. The 'Jobs' tab is selected, displaying a table of jobs. A 'Filter' button is highlighted with a mouse cursor. The table contains three rows of job data.

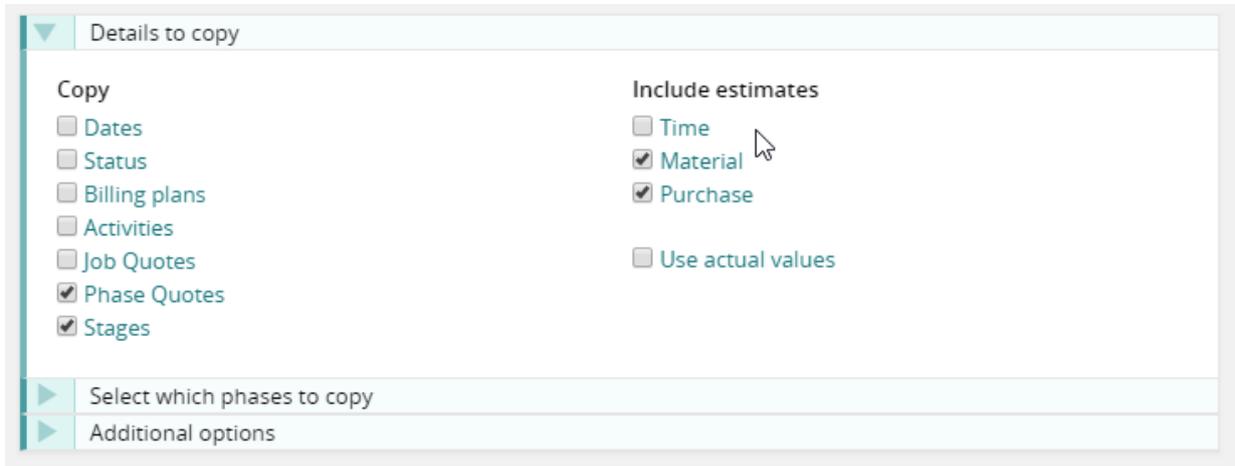
Job	Description
<input type="checkbox"/> 16/1600032	TV Campaign - laptops
<input type="checkbox"/> 16/M600034	Gameboy - CDROM cover
<input type="checkbox"/> 16/1600004	Graphics for New Hunter game

Rows per page: 16 | 1-3 of 3

# Jobs & phase

## Job create – views

When creating a job it is possible to copy an existing job, or create a job based on a job template. In both cases, it is necessary for the user to decide exactly what will be transferred across from the source job to the target (new) job. The right hand panel in the job creation dialog controls this feature.



### Options views

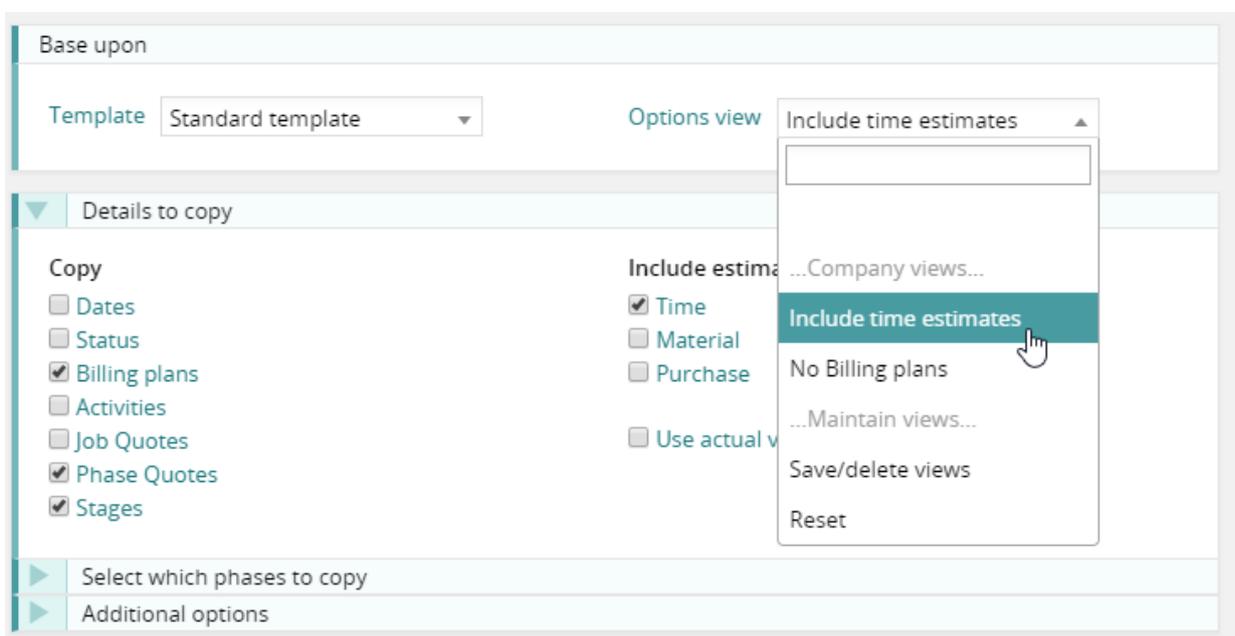
Previously, it was the user’s responsibility to make these choices – or just accept the default values suggested by the system. We now provide a feature for saving these settings. In this way, users can either have a different default set up – or actively select from a pre-created set of options.

### Creating an ‘options view’

Views administrators can create these options views, which then become available to all users. In addition, non views-administrators can create views for their own use.

### Selecting an ‘options view’

In this example, the system has two pre-defined settings available to the user.



## Thermometers on job phases tab

The 'percentage complete' displays as a thermometer.

**Job Website redesign**  
Accounting Solutions for Business

Details | Financial | Invoices | Billing plan | **Phases** | Estimate | Phase quotes | Pending | Activities | Requisitions | Attachments

List | Gantt

New | Delete

Phase	Description	Type	Completed	% Comp.	Fin. Inv'd	Date In
001	Initial phase - Concept	CON		50%		03/04/2018
002	Design	DES		20%		03/04/2018
003	Production	PD		0%		03/04/2018

## Financial page – recognised

For systems set to use the revenue management feature, the financial page of jobs and phases can be set to display either recognised values or invoiced values.

Profit & costs

	Estimated		Actual	
Quoted/Invoiced	2000.00		1500.00	
Purchases	0.00		400.00	
Gross profit	2000.00	100%	1100.00	
Time	200.00		360.00	
Materials	0.00		0.00	
Total costs	200.00		760.00	
Net Profit	1800.00	90%	740.00	49%

## Charts

There is an option to display the recognized figure in chart form.

**Note:** The selected chart is automatically saved back to user settings – therefore users will always see their favourite charts when accessing jobs and phases.



# Special feature for Architects

## Revenue & cost plan

**Note:** This feature is only available for specifically-configured systems.

**Job** Website re-design JOB A050011

Accounting Solutions for Business Print Export Job Actions Cancel Save & Close

Details Financial Invoices Billing plan **Phases** Estimate Phase quotes Pending Activities Requisitions Attachments

Schedule Special Contacts

List Gantt **Phase Revenue & Cost Plan** Cost Charge Defaults Export

Revenue & cost totals Open phase revenue cost plan

Project cost	0.00
Fee total	2000.00
Profit percentage	0.00 %
Total cost available	0.00

Phase	Phase type	% Comp	Work %	Billing %	Cost available	Est cost	Act cost	Rec. invoice	Invoiced total
001	Concept	50	30.00	40.00	0.00	20.00	380.00	400.00	1097.88
002	Design	20	10.00	10.00	0.00	180.00	380.00	40.00	402.12
003	Production	10	10.00	10.00	0.00	0.00	0.00	20.00	0.00
TOTALS			50.00	60.00	0.00	200.00	760.00	460.00	1500.00

WARNING: Plan total is not 100 %

# Kanban boards

A **Kanban board** is a workflow visualization tool that enables you to monitor the flow of work. In Synergist, a Kanban board is represented by a number of columns – each one a Kanban status.

In this example, we have just three columns 'To do', 'In progress' & 'Complete'.

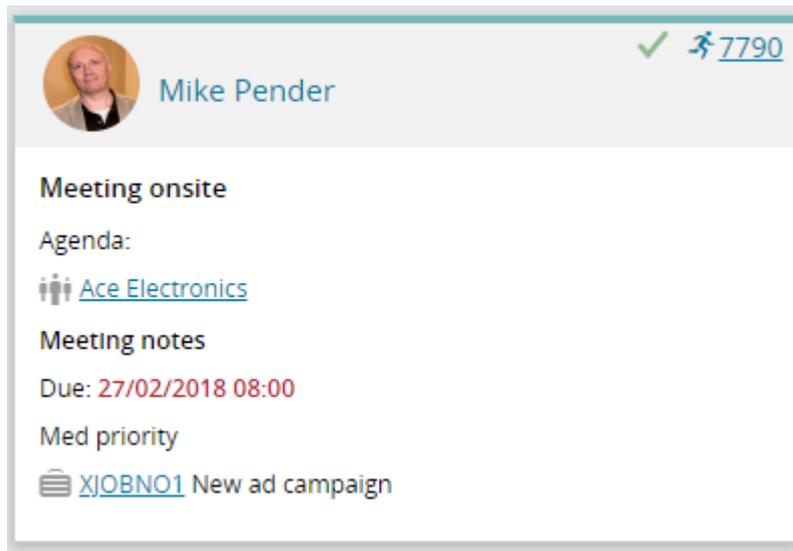
Each column has a number of cards, and each card represents a Synergist 'Activity' record. The user can drag an activity from one Kanban status to another.

Notice there are two display options available - the normal list view and the new 'Kanban' board. In both cases, you will see the same activities. You can switch from one display to the other using the buttons provided.

The screenshot shows the Synergist interface for a 'New ad campaign' job. At the top, there is a header with 'Job New ad campaign' and a dropdown menu for 'JOB XJOBNO1'. Below this are buttons for 'Print', 'Export', 'Job Actions', 'Cancel', and 'Save & Close'. A navigation bar includes tabs for 'Details', 'Financial', 'Invoices', 'Billing plan', 'Phases', 'Estimate', 'Phase quotes', 'Pending', 'Activities' (which is selected), 'Requisitions', 'Attachments', 'Schedule', and 'Special'. Below the navigation bar, there are 'Contacts' and a search bar. The main area is a Kanban board with three columns: 'To do', 'In progress', and 'Complete'. Each column contains activity cards. The 'To do' column has two cards: 'Meeting onsite' (ID 7790) and 'On site consultancy' (ID 8060). The 'In progress' column has one card: 'Artwork' (ID 8058). The 'Complete' column has one card: 'New designs' (ID 8059). Each card includes a user profile picture (Mike Pender), a title, a description, a requisition number, a due date, and a priority level. The interface also includes a 'Refresh board' button and a filter for 'Included completed entities from Within the last 3 months'.

## Kanban cards

Each card displays key information from the activity record:



 Mike Pender ✓ [7790](#)

**Meeting onsite**

Agenda:

 [Ace Electronics](#)

**Meeting notes**

Due: **27/02/2018 08:00**

Med priority

 [XJOBNO1](#) New ad campaign

### Header area

At the top of the card, it displays an avatar of the owner of the activity. It then provides some status icons.

- Number of attachments
- Status
  - Whether the activity is complete (a green tick), and in the case of requisitions an amber tick if the requisition is not complete but has been actioned.
- Link to open the activity

### Main body

Under the heading area is other key information:

- The subject (short description) of the activity
- The activity details
- Client name (clickable)
- Type of activity
- Date & time due (this is red if overdue)
- Priority setting
- Job number and description (clickable)

## Using the Kanban board

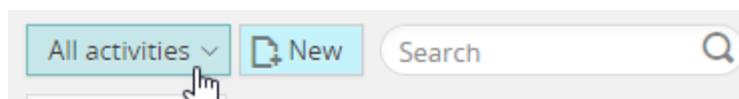
Activity Kanban boards are available in several areas of the product.

- Main activity list
- Job activity tab
- Opportunities activity tab

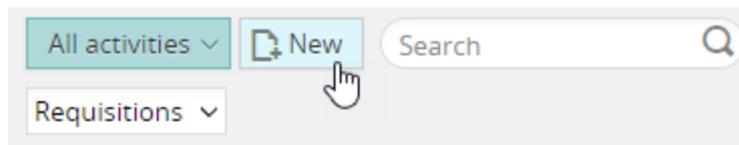
If you create an activity view and specify that it should appear in a separate tab (on clients, jobs etc.) the Kanban board view will also appear there.

### From the Kanban interface, you can do the following actions:

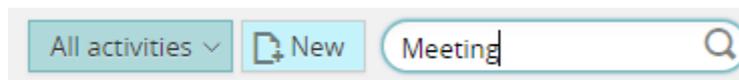
- Select a view
  - These are the same views you would have already set up for your activity lists.



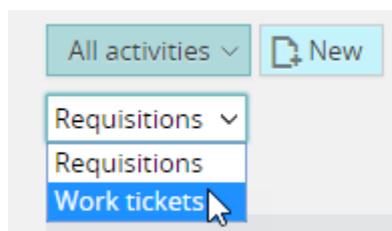
- Create a new activity (card)
  - This will create a new activity, in the normal way, in a separate tab. The activity will default to a 'To do' (see below – building Kanban boards).



- Filter the items in the list using the search bar



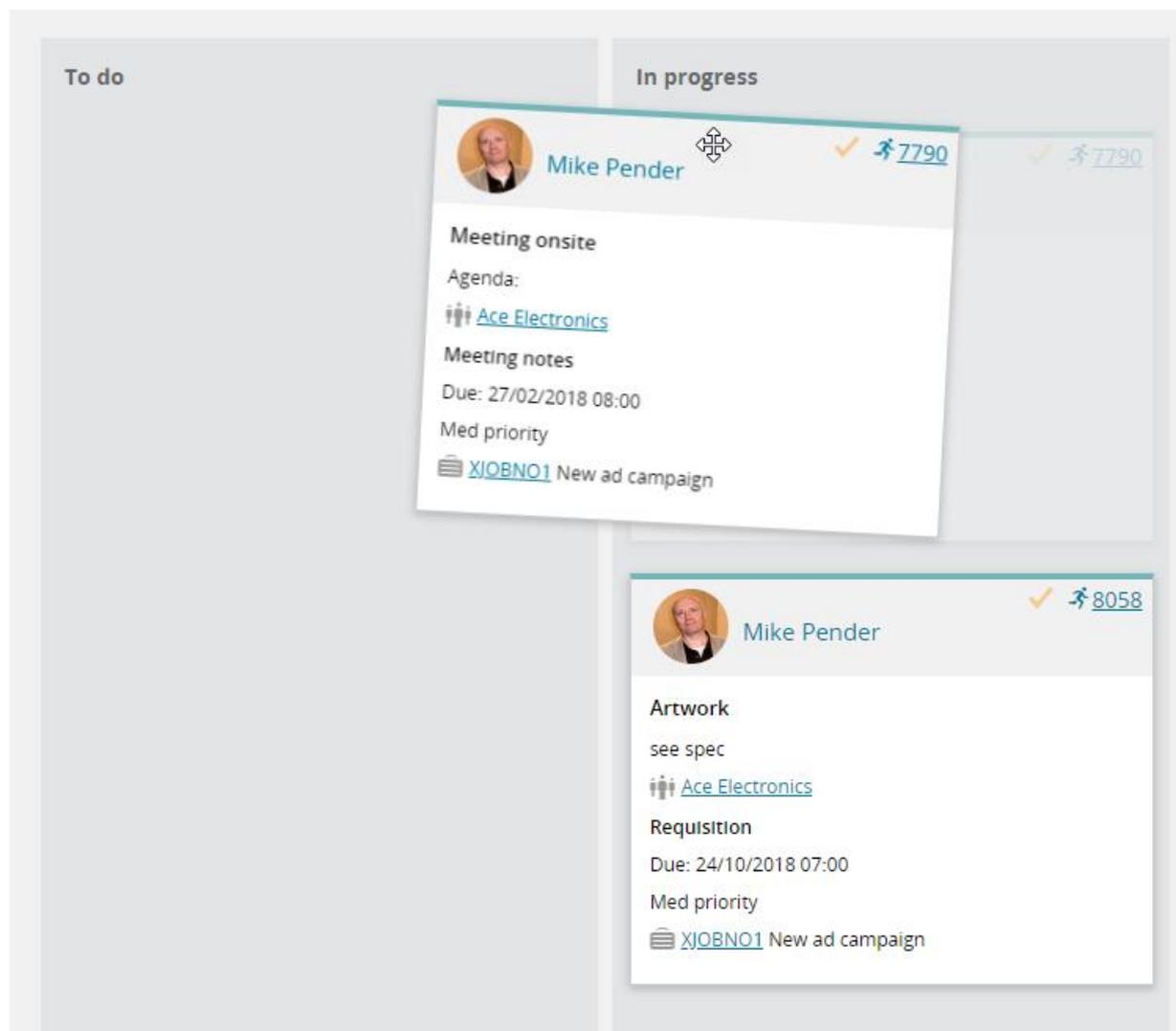
- Select a different board
  - You may have a selection of boards. Kanban boards are created in the File Maintenance section of Synergist.



- Drag a card from one column to another

## Dragging a card from one Kanban column to another

The user can drag a Kanban card from one column to another. If a card is dropped into the 'Completed' column the associated activity is automatically set as completed. If the card is moved out of the completed column, it is re-opened.



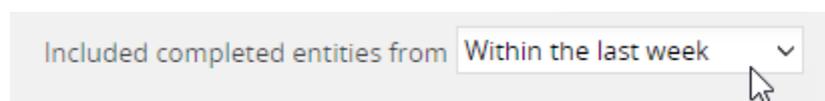
## The selected view

The view of activity records displayed in the Kanban board is the same as the selected view. However, when viewed in a Kanban board, the completed items displayed are controlled by an additional filter.

This is useful for two reasons:

1. You may only wish to see open activities – but you need to be able to drop them into the “Complete” column without them disappearing.
2. If you are looking at the Kanban from the main activity list and there are thousands of completed activities, you would need to filter these to a sensible number of completed items.

## Option to select the scope of completed items that will display in the board

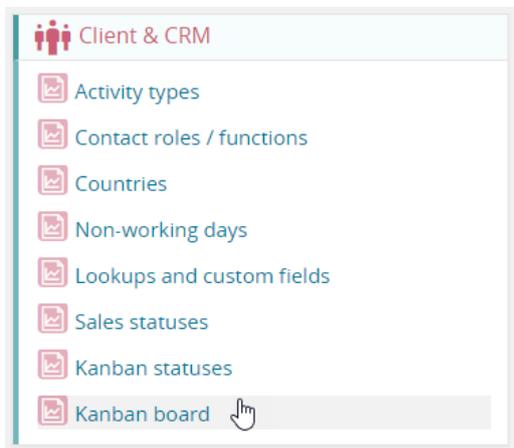


## Creating a Kanban board

The system will come with one simple Kanban board provided. However, you can create as many boards as you need with as many statuses as required to describe your workflow processes.

In order to create Kanban boards you will need access to File Maintenance. Here you will see two new areas,

- Kanban statuses
- Kanban board



## Kanban statuses

You should start by creating the number of statuses you require to describe your workflows.

By default you will have 'To do', 'In progress' and 'Completed'. However, you may wish to add some more statuses – as in this example.

Kanban statuses List London

Page 1 of 1

<input type="checkbox"/> Entitytype	Status code	Status desc	Inactive	Default	Order	Action
<input type="checkbox"/> Activities	TODO	To do		<input checked="" type="checkbox"/>	1	Uncomplete
<input type="checkbox"/> Activities	INPR	In progress			2	Uncomplete
<input type="checkbox"/> Activities	STL	Stalled			3	Uncomplete
<input type="checkbox"/> Activities	TST	Testing			4	Uncomplete
<input type="checkbox"/> Activities	COMP	Complete			5	Complete

1-5 of 5

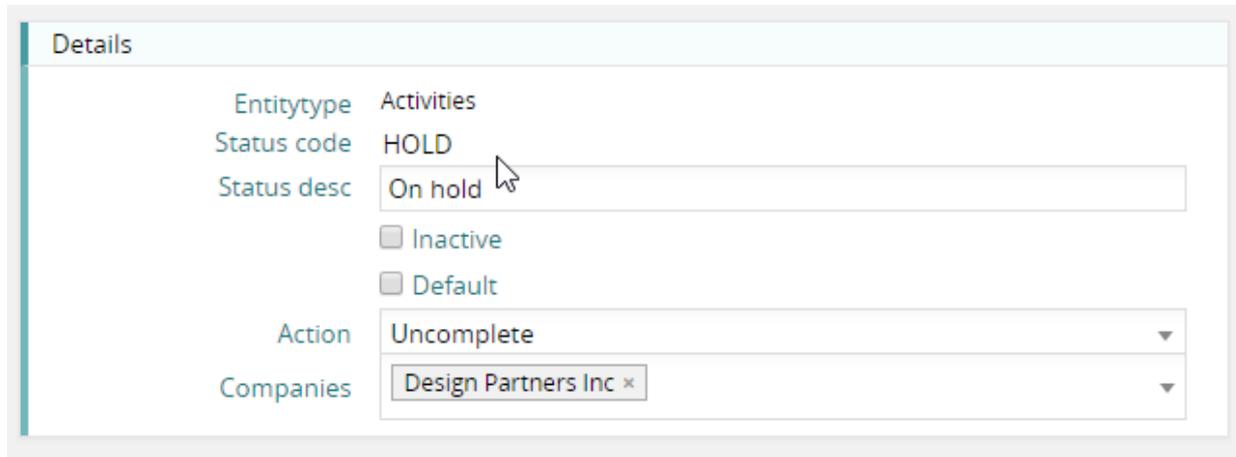
**Note:** All status codes are of type 'Activity'. Currently, Kanban boards are for activities only. However, in the future we may provide Kanban views for other areas of the product like jobs & phases.

## Adding a new Kanban status

In this example, we are adding a new stage: 'On hold'.

Type into the form a meaningful code and a description. You also have to decide if moving an activity to this stage should complete the activity, or un-complete the activity.

You can also specify which companies will use this Kanban stage. Leave blank for all companies.



The screenshot shows a 'Details' form with the following fields and values:

- Entitytype: Activities
- Status code: HOLD
- Status desc: On hold
- Inactive:
- Default:
- Action: Uncomplete
- Companies: Design Partners Inc

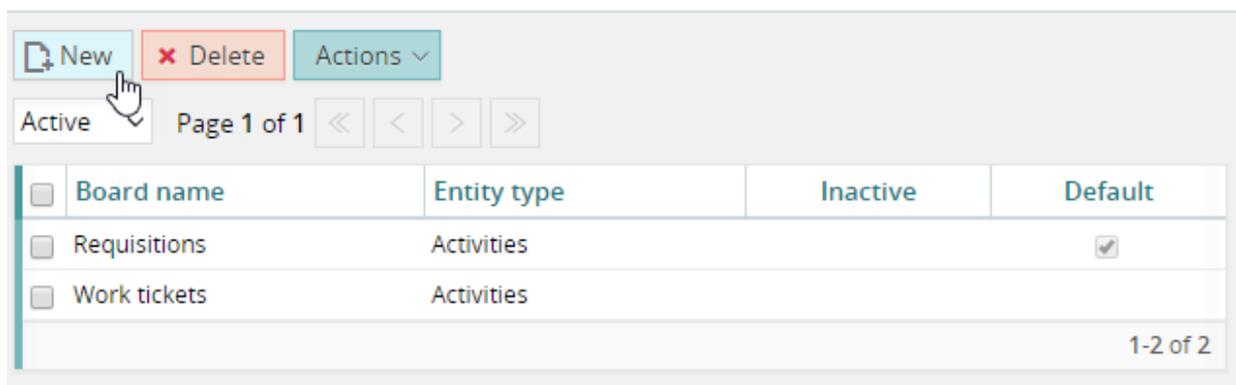
**Note:** There must be at least one stage set as 'action=Complete' and another 'action=Uncomplete'.

## Adding a Kanban board

Select 'Kanban board' from the File Maintenance menu. From here, you can create and modify Kanban boards.

By default, you will have at least one Kanban board.

## Kanban board List



The screenshot shows the Kanban board List interface with the following elements:

- Buttons: New, Delete, Actions
- Page: Page 1 of 1
- Table:

<input type="checkbox"/>	Board name	Entity type	Inactive	Default
<input type="checkbox"/>	Requisitions	Activities		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Work tickets	Activities		

1-2 of 2

## Adding a new board

Click the 'New' button, and give the board a name.

Kanban board

Cancel Save & Close

Details Columns

Details

Board name Handler's main board

Entity type Activities

Inactive

Default

Companies

## Adding columns to the board

Then select the 'columns' tab, and select a column you require for the board.

Details

Kanban board uuid Handler's main board

Kanban status code In progress

Column order

Complete

Extra

In progress

Stalled

Testing

To do

Continue adding columns until you have added all the stages you require for this board.

Note: you should enter a column order for each Kanban status to ensure the columns are in the order you require.

## Kanban board

Cancel Save & Close Delete

Details Columns

Add Remove

<input type="checkbox"/>	Kanban status code	Column order	Allow add new
<input type="checkbox"/>	In progress	1	
<input type="checkbox"/>	Testing	2	
<input type="checkbox"/>	Complete	3	

**Note:** You should be aware that only activities that are allocated to statuses present in the Kanban board will appear on the board.

## MyTasks

---

MyTasks is a legacy feature.

## Export

Simple MyTasks export feature has been added.

# Projects & sub-projects (campaigns)

## Job creation

During the initial creation of a job, it is now possible to create a new project or a sub project. This is particularly useful if project or sub project have been set up to be mandatory.

## Custom fields

Custom fields are now supported for projects & sub-projects.

### My project: Airlock Retainer

Details | My sub projects | Jobs | Phases | Billing Plans (jobs) | Billing plans (phases)

**Details**

My project Name

Notes

Budget

Complete

**Custom fields**

Special department

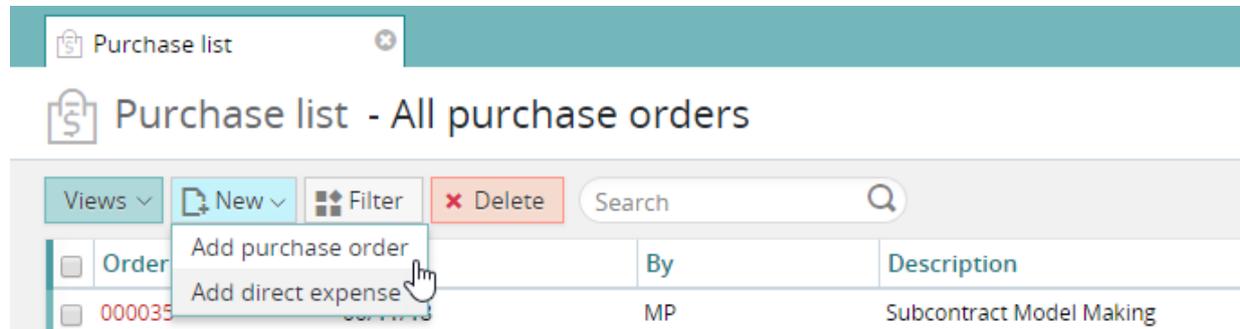
# Purchasing

---

## Create purchase from main list

It is now possible to create a purchase order from the 'Purchases' list.

After selecting the option, the user is prompted to select a job to raise the purchase against. The 'New purchase' form is then opened in a new tab.



## Purchase "discount" feature

Synergist has always provided a feature for marking-up a purchase estimate/order. In this way, the recommended charge-out price associated with a purchase can be automatically calculated. The default percentage markup is determined by the "PO markup" on the client or supplier record.

This method works well in most situations. However, for business involved in selling advertising, it is common practice for Media outlets to offer a discount to agencies selling advertising on their behalf. In this situation, instead of marking-up the known cost of a purchase, it is normal practice to look at the selling price (the recommended charge) and discount this figure to obtain the cost of the advertising.

e.g.

Selling price for advertising	£100,000
Discount offered to agency	15%
Cost of the purchase order	£85,000

Synergist now supports this way of working.

## Setting up a discount style 'Media' supplier

Create or open a supplier of advertising from the list of suppliers. On the 'Financial/Notes' tab change the 'Markup method' from 'Markup %' to 'Discount %'.

### Supplier: Cable TV Times

Details	Supply types	Contacts	Financial/Notes	Orders	Purchase invoices	Prices	Attachments
Misc							
VAT	1 (UK 20% - INPUT2) Standard						
VAT reg no	GB999 9999 73						
Markup method	Discount %						
Standard %	Markup %						
Days credit	Discount %						
	<input type="checkbox"/> Multi-currency						

Then set the default percentage discount offered by this media supplier.

### Supplier: Cable TV Times

Details	Supply types	Contacts	Financial/Notes	Orders	Purchase invoices	Prices	Attachments
Misc							
VAT	1 (UK 20% - INPUT2) Standard						
VAT reg no	GB999 9999 73						
Markup method	Discount %						
Standard %	15						
Days credit	30						
	<input type="checkbox"/> Multi-currency						

## Creating a 'discount' style purchase estimate

Create a purchase estimate / order in the normal way. As part of this procedure, you will select a supplier. If the supplier you select is a media supplier, who is set to use 'Discount %', the purchase order will automatically be set to being a discount style purchase. However, you can change this by selecting a different 'Markup method'.

Phase A050032.001 Media - advertising

Purchase Estimate: {EST}

Air Products 16/A050032.001 Magazine advertising

Convert to Real

Supplier: Cable TV Times 16/S123463  
Contact: - Blank -  
Their ref:

Details Text Lines Delivery Notes Tender Attachments

Main details

Ordered by: Mike Pender  
Markup method: Discount %  
Supply type\*: Media - advertising  
Description:

Status

Mark as investment / non-chargeable

Picked for

Estimate  Quote  Option

	Actual	Estimate
Date	00/00/0000	31/10/2018
VAT		1 (UK 20% - INPUT2) Standard
Cost	0.00	0.00
Discount %	15.00 %	15.00 %
Charge Out	0.00	0.00

Created by Mike Pender on 31/10/2018 at 11:10am

## Entering the purchase order selling price (recommended charge out value)

In this example, the selling price for this purchase is £100,000. Entering this value in the charge out box automatically calculates the cost to the agency – in this case £85,000.

Estimate

31/10/2018

1 (UK 20% - INPUT2) Standard

85000.00

15.00 %

100000.00

## Using discount with purchase order lines

If you are using purchase order lines to create your purchase/estimate, the same principle applies.

The default discount is picked up from the supplier and appears under the disc % column. The user would then enter the amount the client is to be charged in the Charge Out column.

The screenshot shows a web browser interface for a purchase estimate. At the top, there are tabs for 'Phase A050032.001', 'Advertising', and 'Cable TV Times'. Below the tabs, the title is 'Purchase Estimate: Advertising: {EST}'. There are sub-titles for 'Air Products' and '16/A050032.001 Magazine advertising'. A 'Convert to Real' button is visible. The 'Supplier' is 'Cable TV Times 16/S123463' and the 'Contact' is '- Blank -'. The 'Their ref' field is empty. Below this, there are tabs for 'Details', 'Text', 'Lines', 'Delivery', 'Notes', 'Tender', and 'Attachments'. The 'Lines' tab is selected, showing a table with columns: 'Description', 'Quantity', 'Unit Cost', 'Cost Total', 'Disc %', 'Charge Out', 'Style', 'Picked', and 'Actions'. The table contains one line item: '1 weeks advertising fee - full page ad' with a quantity of 0, unit cost of 0.0000, cost total of 0.00, disc % of 15.00, and charge out of 1000. The 'Totals' row shows a cost total of 0.00, disc % of 0.00, and charge out of 0.00.

Description	Quantity	Unit Cost	Cost Total	Disc %	Charge Out	Style	Picked	Actions
1 weeks advertising fee - full page ad	0	0.0000	0.00	15.00	1000	B / f / u	<input checked="" type="checkbox"/>	
Totals			0.00	0.00	0.00			

On tabbing out of the field, the system applies the discount to the line and updates the Cost Total.

This screenshot is identical to the previous one, but the 'Cost Total' for the line item '1 weeks advertising fee - full page ad' has been updated to 850.00. The 'Charge Out' remains at 1000.00. The 'Totals' row now shows a cost total of 850.00, disc % of 0.00, and charge out of 1000.00.

Description	Quantity	Unit Cost	Cost Total	Disc %	Charge Out	Style	Picked	Actions
1 weeks advertising fee - full page ad	0	0.0000	850.00	15.00	1000.00	B / f / u	<input checked="" type="checkbox"/>	
Totals			850.00	0.00	1000.00			

# Quoting

## Saving a view

Quote 'build' views can be saved as views. Access this screen from the 'Advanced quote' button on the Quote tab of a job/phase.

## The quote build options

## Using the build

The new build can be set as the default build or selected from the views list when creating a quotation.

# Reporting

---

## Purchase orders report

Option to include/exclude cancelled purchase orders.

More filters Show inactive options

- Company
- Supplier
- Client
- Job & Phase
- Purchase**
  - Purchase type**  
 Order  Expense
  - Real/estimate**  
 Real  Estimate
  - Cancelled**  
 Not cancelled  Cancelled

## Purchase invoice awaited report

Improvements to the export: fields added

- Job description
- Phase description
- Project
- Sales invoice number

## Client analysis report

Amendment value column renamed to "Variance".

## Staff utilization

Totals added.

Ability to sort by staff team.

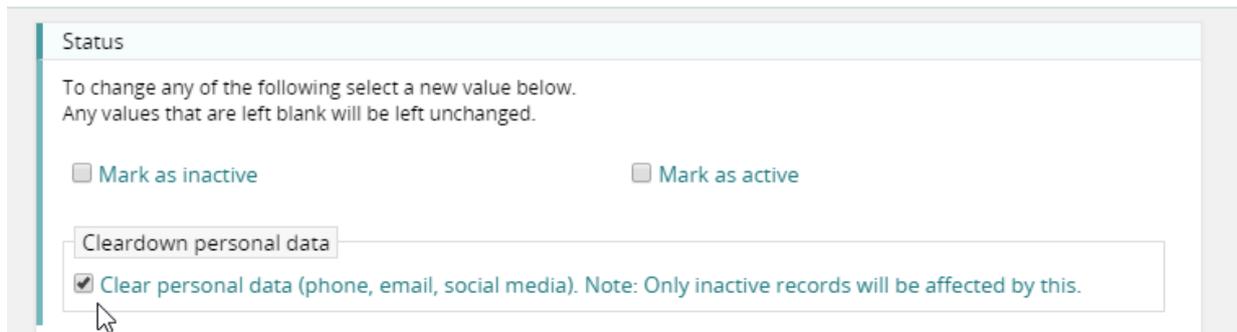
# Supplier contacts

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## GDPR clear down feature

Similar to the feature already available for client contacts. Ability to clear down personal data for supplier contacts using batch update.

### Supplier contacts batch process for 1 record



Status

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

Mark as inactive  Mark as active

Cleardown personal data

Clear personal data (phone, email, social media). Note: Only inactive records will be affected by this.

# Timesheets

## Weekly timesheet auto save

When users enter time using the weekly timesheet feature, they should save the time they have entered prior to closing the browser. To ensure this procedure is followed the system will now automatically save any time entered into the weekly timesheet after 30 seconds.

## Weekly timesheet – additional timesheet

It is normal practice for users to submit/post the time accumulated on their weekly timesheet at the end of each day. Once this is posted, all the cells for the day are no longer enterable. This is because, in most situations, there is just a single timesheet associated with each cell. When the timesheet is posted, it can no longer be edited.

This is usually OK. However, what happens if a user does some work on a current job AFTER submitting/posting all the timesheets for the day? Previously, the only way to add an additional timesheet was to enter the Daily timesheet interface and create a timesheet there.

It is now possible to add an extra timesheet from within the Weekly timesheet interface.

## Weekly timesheet

In this example, all the time sheets for Thursday are posted. However, if the user hovers over the time values the system displays 'Click to add another timesheet'.

Weekly timesheet: Mike Pender

Design Partners Inc  
Cancel Save

Actions Add job Post all Post all previous (2) This week 5 Mon

	Client	Job Phase	Charge code		Post	Total Hours						
					Nov '18							
	Ace Electronics	1600032.002	Copy Writing		5 Mon	6 Tue	7 Wed	8 Thu	9 Fri	10 Sat	11 Sun	3
	Ace Electronics	XJOBNO1.001	Business Research Time					2				2
	Ace Electronics	1600004.003	Alter				1					1

## Adding an additional timesheet

Quick time sheet

Ace Electronics  
16/XJOBNO1 New ad campaign  
001 Initial work  
Mike Pender: 16/BRT - Business Research Time

Hours: 3

Work done

Cancel Post

# General Enhancements

## New hovers

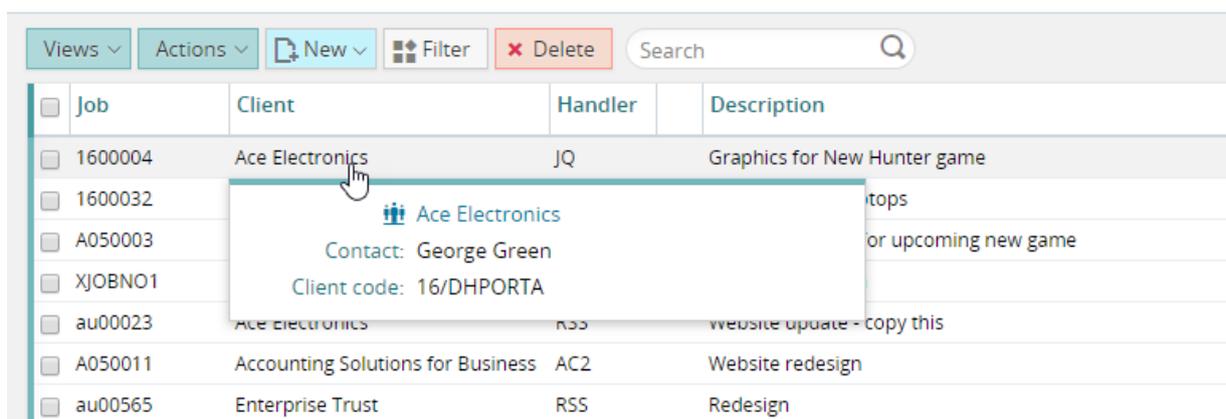
The system now provides contextual hovers, to enable users to see key data in lists without opening records or drilling down.

### Example from the job list

#### Client column

Hovering over the Client column – you see info about this client and a link to the client record.

 Job list - delete this view



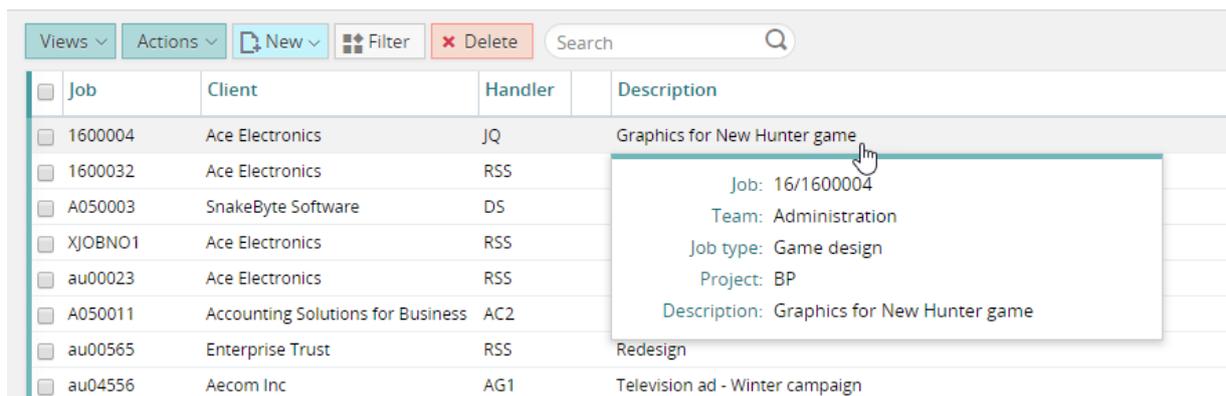
The screenshot shows a table with columns: Job, Client, Handler, and Description. A mouse cursor is hovering over the 'Ace Electronics' entry in the Client column. A tooltip is displayed over the cursor, showing the client's name with a building icon, contact name 'George Green', and client code '16/DHPORTA'.

Job	Client	Handler	Description
1600004	Ace Electronics	JQ	Graphics for New Hunter game
1600032	Ace Electronics	RSS	tops
A050003	SnakeByte Software	DS	or upcoming new game
XJOBNO1	Ace Electronics	RSS	
au00023	Ace electronics	RSS	website update - copy this
A050011	Accounting Solutions for Business	AC2	Website redesign
au00565	Enterprise Trust	RSS	Redesign

#### Description column

Hovering over the Description column – you see job information.

 Job list - delete this view



The screenshot shows the same table as above. A mouse cursor is hovering over the 'Graphics for New Hunter game' entry in the Description column. A tooltip is displayed over the cursor, showing job details: Job ID '16/1600004', Team 'Administration', Job type 'Game design', Project 'BP', and Description 'Graphics for New Hunter game'.

Job	Client	Handler	Description
1600004	Ace Electronics	JQ	Graphics for New Hunter game
1600032	Ace Electronics	RSS	
A050003	SnakeByte Software	DS	
XJOBNO1	Ace Electronics	RSS	
au00023	Ace Electronics	RSS	
A050011	Accounting Solutions for Business	AC2	
au00565	Enterprise Trust	RSS	Redesign
au04556	Aecom Inc	AG1	Television ad - Winter campaign

## Advanced features

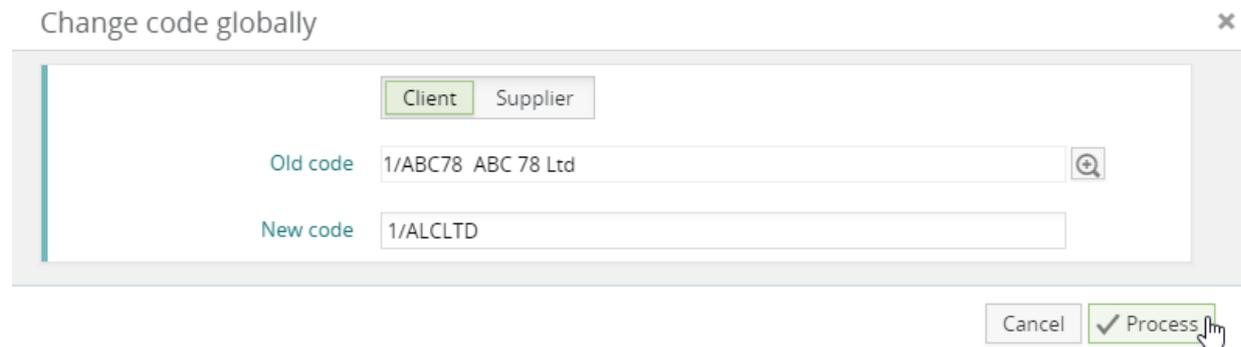
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### SQL database replication

New facility to specify which tables are included in the replication to an SQL database.

### Utilities

Utility provided to change an existing Client or Supplier code.



Change code globally

Client Supplier

Old code 1/ABC78 ABC 78 Ltd

New code 1/ALCLTD

Cancel Process

### Synergist API v3.3

The new v3.3 API adds new functionality to Synergist API. This includes full create/read/write access to Client and Client contact records.

See <https://apidoc.synergist.co.uk>