synergist

Version 12.9 - Release Notes

Synergist Browser Interface

MARCH 2023

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

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Reports

'Period profit' report column heading changes (3521, 3727, 5458)

The column heading changes to exported CSV files are:

- 'Recommend' has been changed to 'Rec. Charge'.
- 'Total Time' to 'Total Time Cost'.
- 'Total Materials' to 'Total Materials Cost'.
- 'Total Purchases' to 'Total Purchases Cost'.
- 'Profit' to 'Net profit'.

Data viewer - Option to sort 'Selected data columns' (5886)

Ascending and descending options have been added to each selected data column.
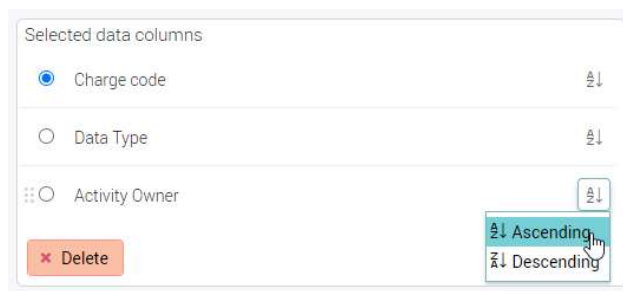
Data viewer - Allowing overlapping date ranges (5833)

When overlapping date ranges occur, a system message appears allowing users to continue should they wish to.

Data viewer – Advancements to the 'Options' panel (6485) (6362)

The 'Options' panel has moved to the right-hand side of the page and additional options include:

- Only show whole numbers.
- Include thousand separators.
- Swap over categories and series.
  - If unticked, the 'y' axis on the chart displays the data type categories.
  - If ticked, the 'y' axis on the chart displays the dates.
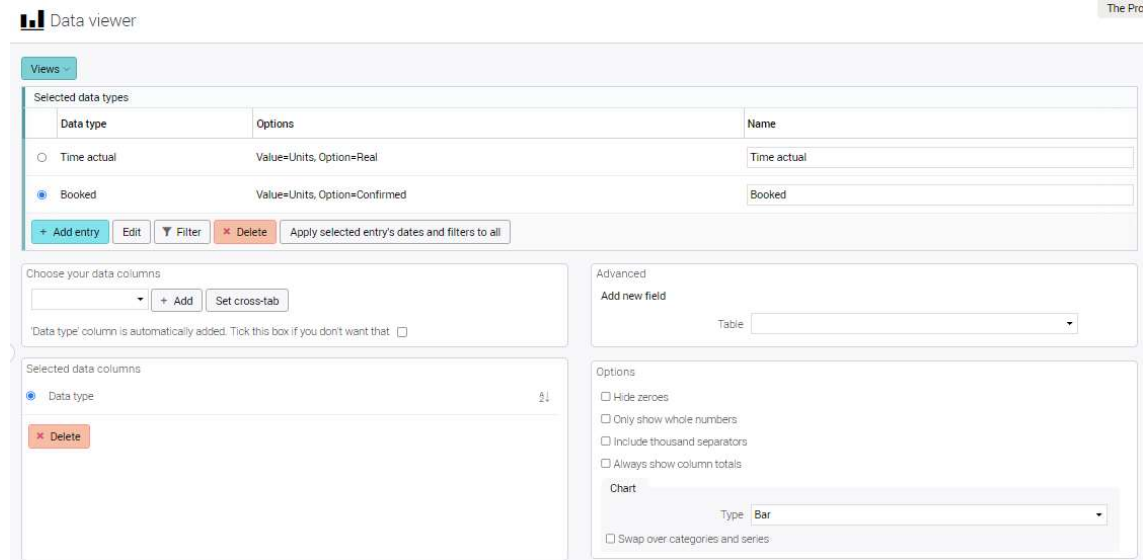
Data viewer – Drag and drop on the 'Selected data columns' panel (5422)

Selected data columns can be moved to any position on the list using drag and drop.
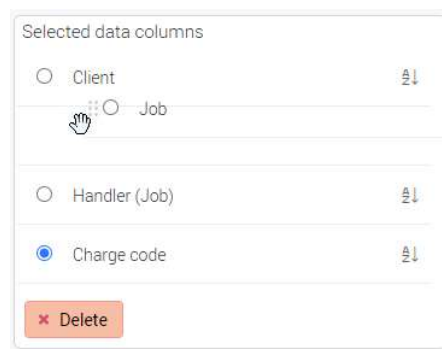
Clients & Jobs

Creating a job from an activity (3403)

A job can be created from inside an activity record via the 'Actions' drop-down menu and then selecting 'Create a job for this activity'. This feature is only available if the activity is at client level and not linked to a job.
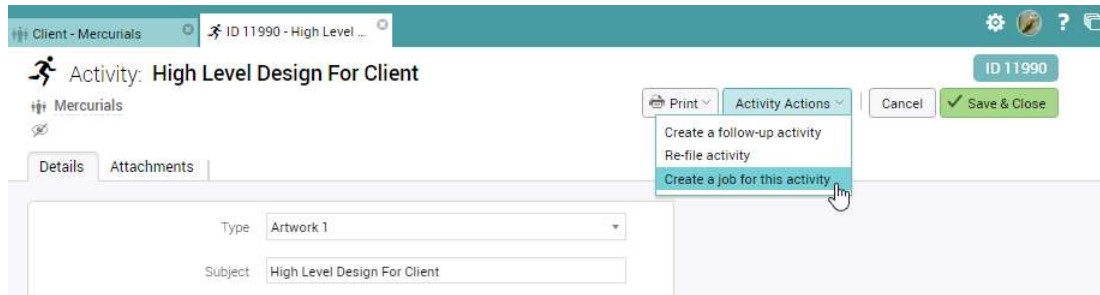
Selecting the thermometer type on job and phase estimates (4224)

The thermometer on the job or phase estimate page now has a menu allowing users to choose the type of calculation.
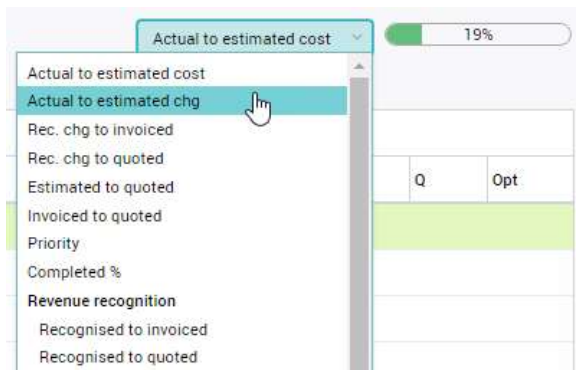
Integration with Microsoft Dynamics 365 Business Central (4880)

A new integration has been added for Microsoft Dynamics 365 Business Central. Due to limitations in the Dynamics 365 Business Central API, there are some caveats, these are documented in the new "Info" page available on the Synergist accounts link screen as shown below.
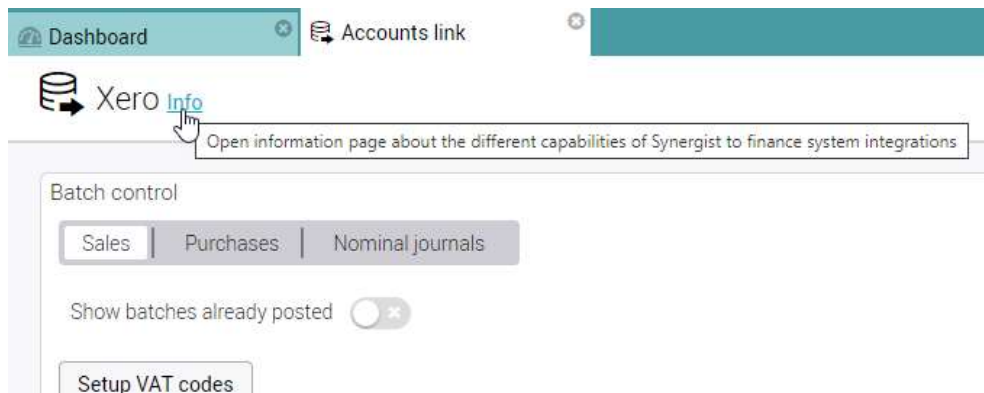
'Custom opt out' on client contact (4782)

'Custom opt out' has been added to the 'Notes/privacy' tab on client contacts - giving more options as to which communications client contacts can be opted out of.
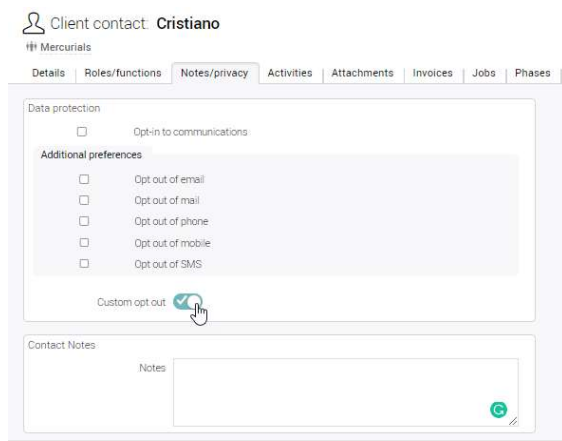
'Job description' added to the phase list column picker (5245)

'Job description' can now be selected as a column on the 'Phase list'.
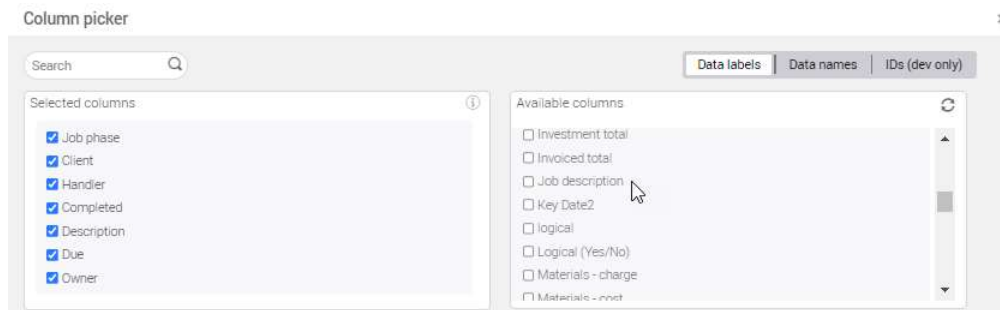
'Use actual values' renamed to 'Copy actual values as estimate' (5435)

For added clarity when copying a job, 'Use actual values' has been renamed 'Copy actual values as estimate'.
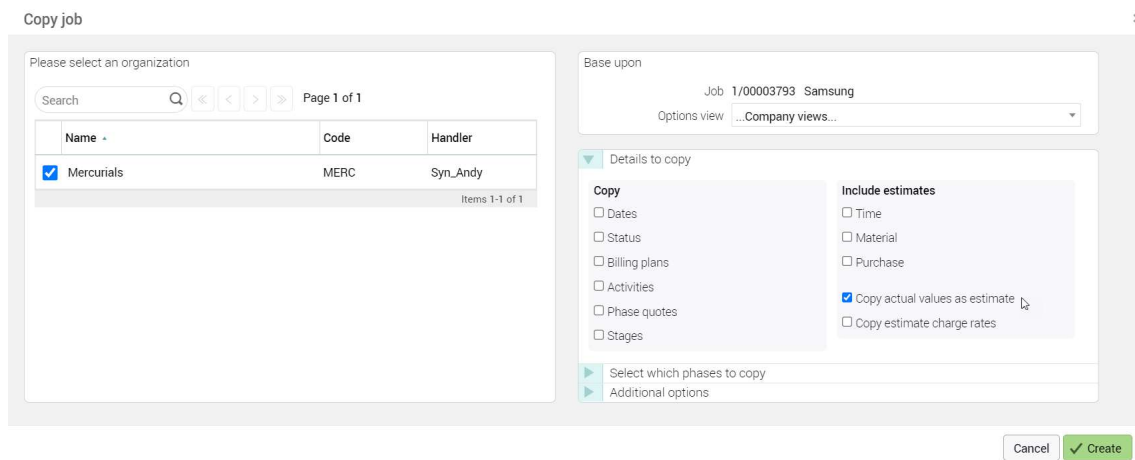
Drop-down menu added to 'New' button on Client and Job activity records (6283)

When creating a new activity from a client record or job record, a dropdown menu has been added to the 'New' button with options to create an activity at client, job or phase levels.
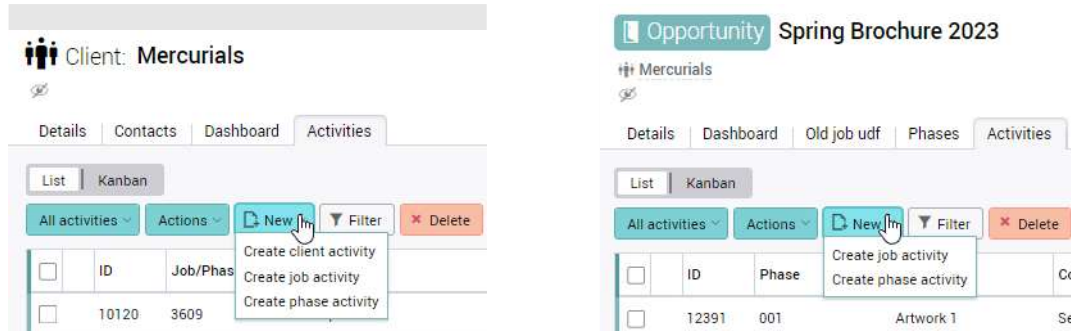
'Organization' column added to Client contacts (5664)

The new 'Organization' column appears if the client has linked organisations - making it easier to see which organization the contacts belong to.
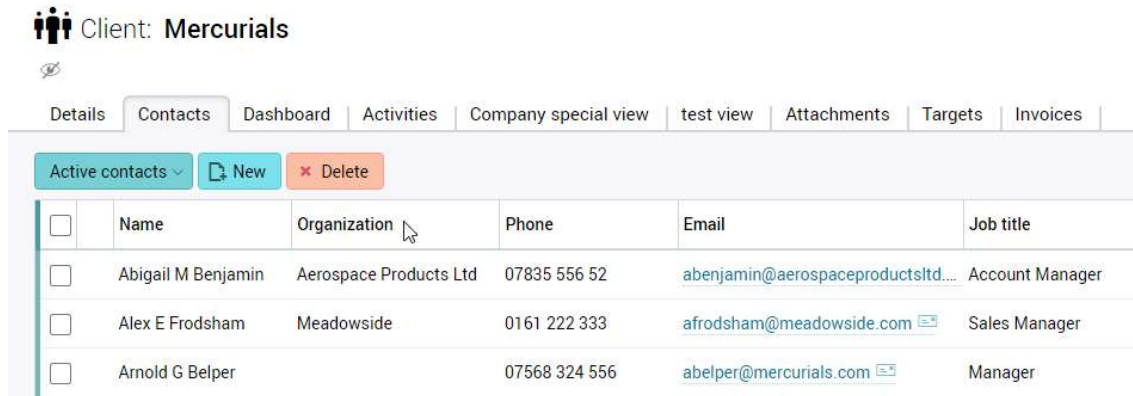
Ability to choose details displayed on Kanban cards (3408)

This feature enables users to customise their Kanban cards by adding, removing and re-ordering Kanban card fields. The 'Field picker' is available on the main activities list Kanban board, by clicking on the 'Options' button. Please note that the Kanban field choice can be saved with the view in the same way as with lists.
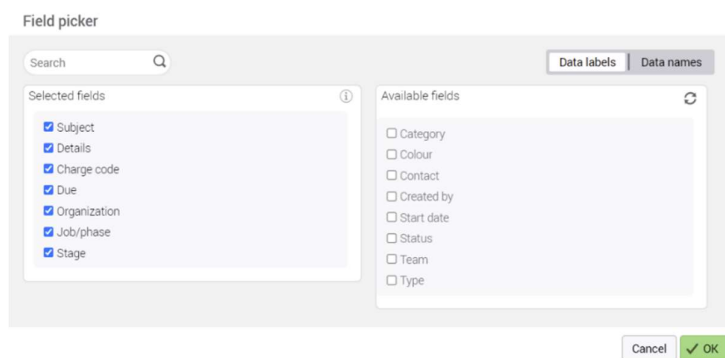
Job level sales invoice revenue allocations (3418)

This option enables users to see a single billing / revenue allocation per job on the invoice, and to be able to update the totals without expanding to see phase allocations.

When turned on, the invoice allocations tab has a modification to its current functionality. Instead of only showing the phase allocations (current functionality), it has a summary row that represents the whole job. On a multi job invoice there are multiple summary rows – one for each job.

If the company setting is set to default to 'Collapsed - show job level allocations' it defaults to showing only the summary row(s). If the setting is set to 'Expanded - show phase level allocations' it defaults to showing the job summary row, and all the phases for that job below the summary row.

Users can still edit the fields on the phase allocation lines on a draft invoice to decide how much is billed and recognised. However, in certain situations it is also possible to edit the allocations at job level - when the job level allocation has not been expanded to show phases.

The default state of the invoice phase allocations may be set to expanded or collapsed. Tick the 'Allocations summary' checkbox to view the 'State' drop-down menu and then select one of the two options.

Please note that job level allocation rows are not editable if:
- The invoice is real.
- The job allocation is expanded.
- There is more than one phase allocation with values associated with this invoice for the job.

Option to delete all deleteable billing plans when deadening an opportunity (4809)

On deadening an opportunity, a new option in the dialog appears labelled 'Remove any unused billing plans' (shown below). This is ticked by default. When ticked this will look for any billing plans associated with this job (can be on jobs or phases) and will delete these if the user has the privileges for each of them to do so. If any of these fail to be deleted a message will appear stating how many.
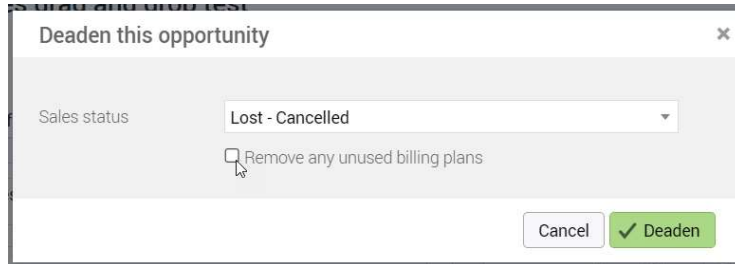
'Phase' column added to 'Materials' and 'Purch & exp' tabs (6067)

A phase column and tooltips have been added to the 'Materials' and 'Purch & exp' tabs on job records. Click on the column header to sort the phases into ascending/descending order. Hover the cursor over a row to view the tooltips.

Note: Tooltips have also been added to the 'Time' phase column on job records.
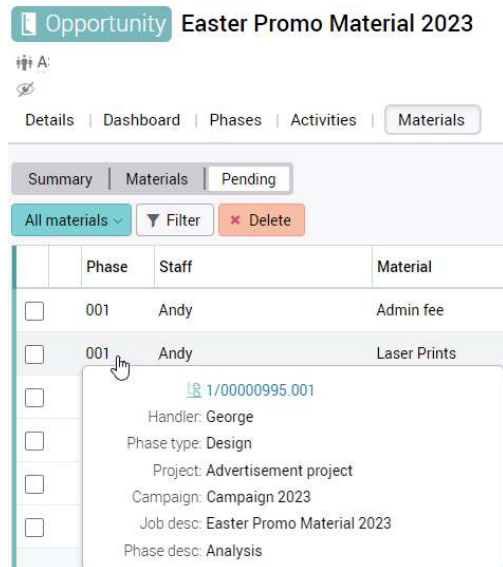
Accounts integration with Implicit (4444)

A new integration has been added for Implicit. Due to limitations Iplicit API does not currently accept tax amounts, Iplicit will recalculate them. Transactions must be cross-checked in Iplicit prior to final posting within Iplicit. This limitation is under consideration by Iplicit to allow tax amounts to be specified which could create a tax adjustment.

File maintenance / Company settings

Team list export for team members (8867)

An 'Export team members' option has been added to the Actions button on the Team list.
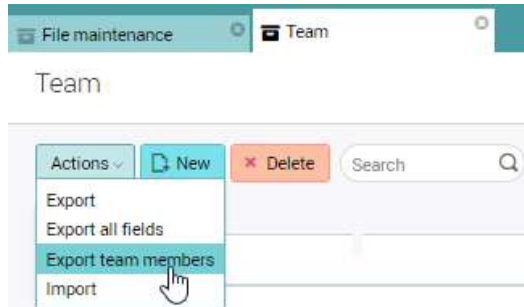
Block self-approval of Timesheets, Expenses, Purchases and Purchase invoices (3037)

A new feature to control the self-approval of 'Timesheets', 'Expenses', 'Purchases' and 'Purchase invoices' is located on the User record 'Approval' tab.
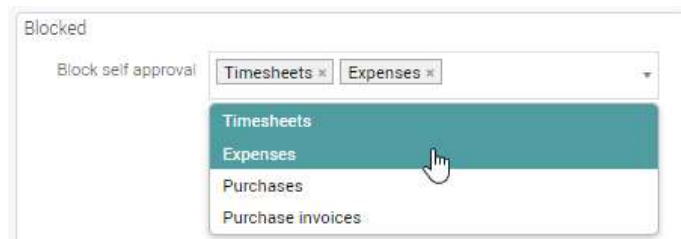
User's full name displayed on 'User record' tab (9764)

The user's full name is displayed on the user record tab - making it easier to identify the record owner.

'Email default from' in Office 365 (3553)

This new feature makes it possible to assign a different 'From' address when emailing reports through Office 365. It is particularly useful for sending out emails from a generic address such as 'Accounts' or 'Sales', instead of it being from a sender's email address.

To activate, open a report relating to 'Invoicing', 'Purchase orders' or 'Quotes' and complete the 'Email default from' field with a valid email address. For multiple reports, open each report and amend the 'Email default from' field.
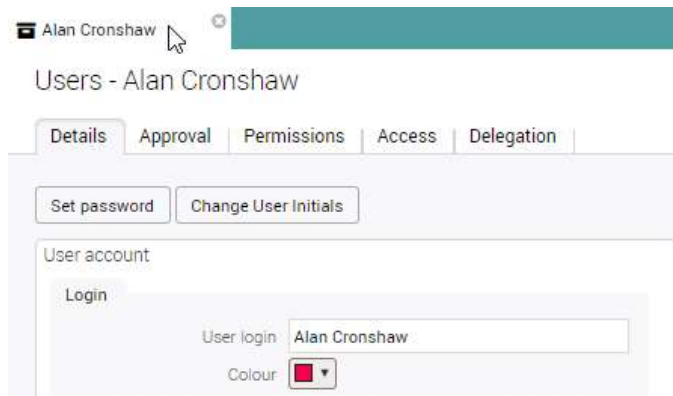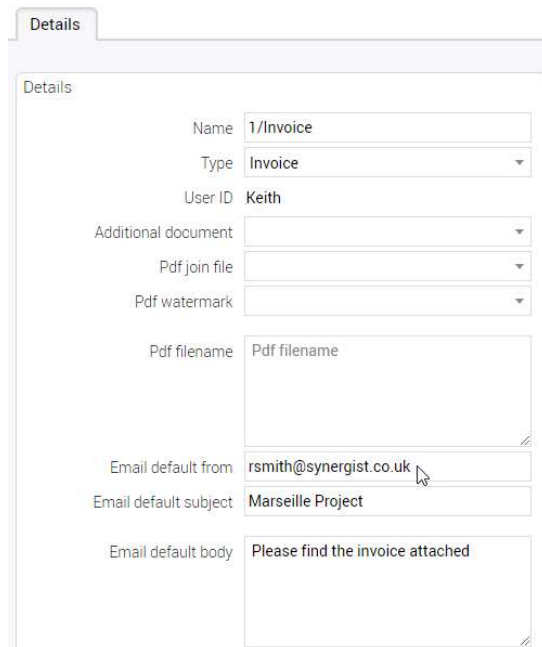
Please note that 'Outlook' permissions are checked on sending to ensure the user has permission to use the email address.

Parent custom field lookup items are protected from deletion (3622)

Only parent custom field lookup items with no associated data can be amended or deleted. Parent custom field lookup items with data associated to them cannot be amended or deleted but can be marked as inactive.

Short code for client email added to document templates (3929)

A short code for client email has been added to Document templates.
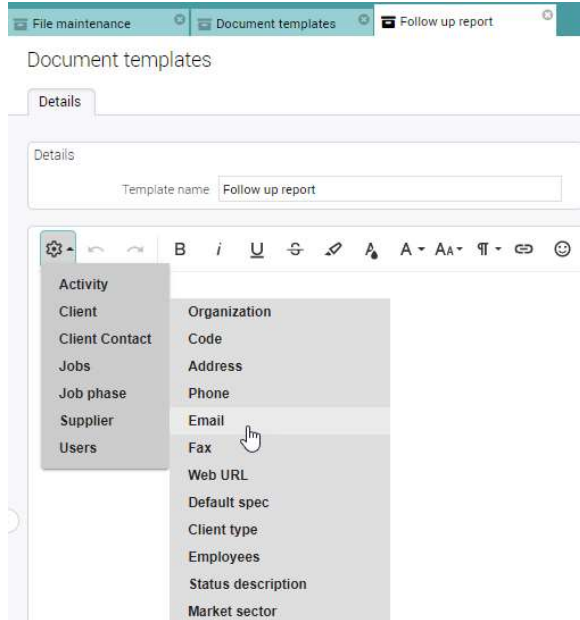
'Investment' column added to 'Purchase orders' report (3974)

Running a CSV on a Purchase orders report, the table includes a new 'Investment' column which displays 'Y' or 'N' depending on whether purchases are marked or not marked as investment.

Reset password requirements displayed (4398)

When a user logs in and is required to change their password, a list of password requirements is displayed. On clicking 'Reset', any unmet password requirements are listed.

Auto tickoff for revenue recognition added in company settings (4446)

An 'Auto tickoff for RR' option has been added to the billing section on the Switches tab in Company settings. When using auto billings plans, raising an RR invoice against it the costs can now be set to automatically ticked on or off.
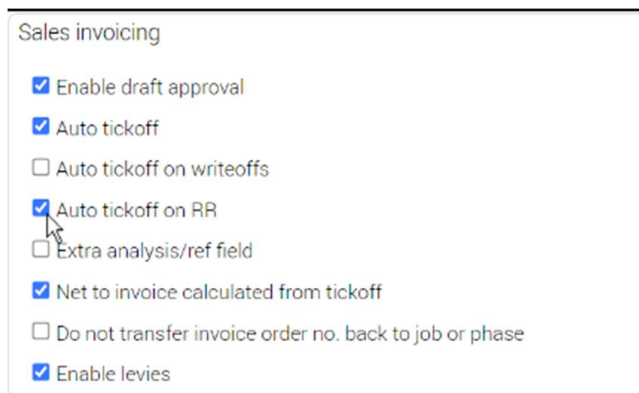
'Approval' section on batch updating the users list – (4631) (6188)

When batch updating the File maintenance Users list, a new 'Approval' section has been added.

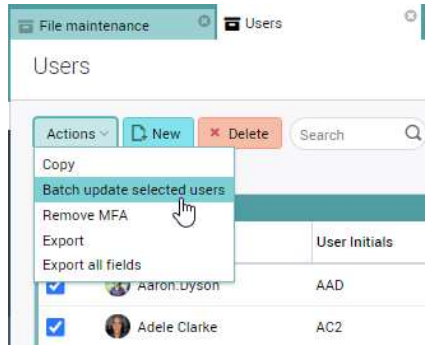Existing checkboxes - 'Timesheets', 'Expenses' and 'Approved by' - are framed to make it clearer how they are linked.

New checkboxes - 'PO approval level' and 'Block self-approval' – have been added for increased functionality.
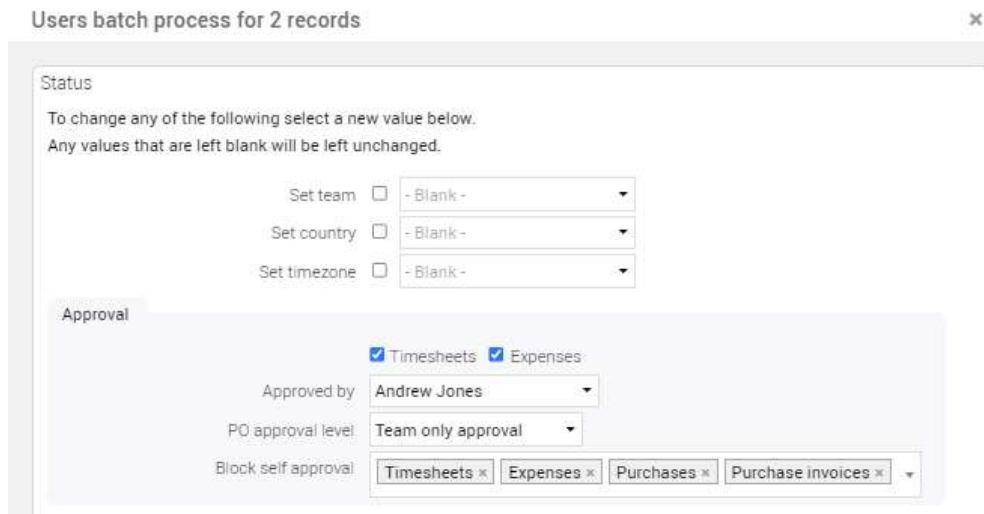
Note added to 'Only allow timesheets/bookings if estimates exist' (4733)

A 'Note' has been added to the 'Only allow timesheets/bookings if estimates exist' panel, located in Company settings Timesheets.
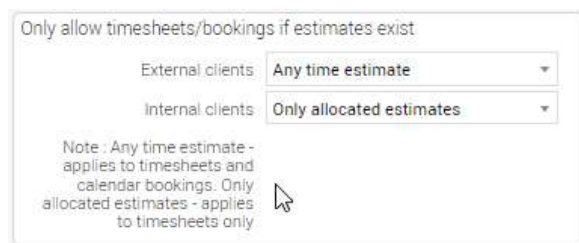
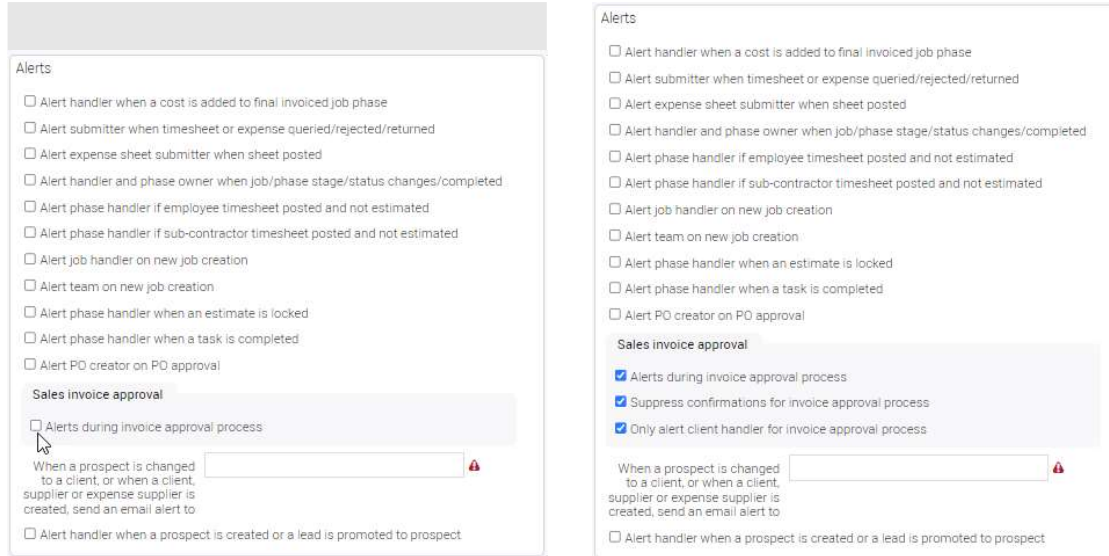## 'Sales invoice approval' section on Company Alerts (6490)

The existing checkboxes - which control email alerts during the sales invoice approval process - have been framed to make it clearer how they are linked.

Invoice final checkbox default option when importing from Xero (5138)

'Default PO part allocation for purchase invoice import' has been added to the 'Accounts panel' for the following Account links:

- Xero
- Sage Business Cloud Accounting
- Quickbooks Online
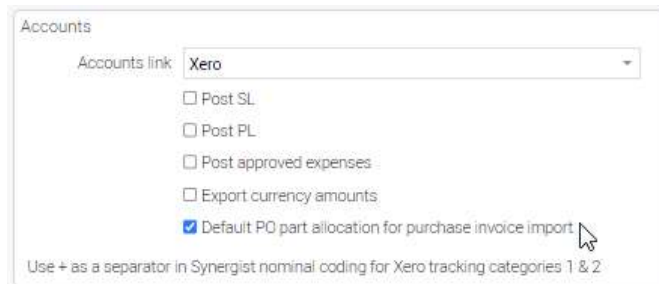
When the option is ticked and invoices are imported from Xero, Sage Business Cloud Accounting or Quickbooks Online, the option in the Accounts link 'Final' column is set to 'Off'.

Calendar Bookings

Auto colouring bookings on Projects and Campaigns (3562)

Colours can be assigned to projects and campaigns via the colour picker on project or campaign records. The assigned colours are then displayed in the 'Colour' column on Project / Campaign lists.

When a calendar booking is associated with a project or campaign, the booking colour matches the colour assigned to the project / campaign. Booking colours can be added in other places too, and the hierarchy of which colour is shown is listed below:

- Booking colour
- Campaign
- Project
- Client
- Current stage
- Job/Phase handler
- Staff/User

Recurring bookings functionality upgrade (3662)

When creating a recurring booking, if the start date of the first recurring booking is the same as the source booking, the first booking in the sequence is the source booking and it is linked to the newly created bookings. Example:

- A source booking has a start date of Monday March 13th.
- Right click on the source booking to create a recurring booking.
  - Leave the start date unchanged - Monday March 13th.
  - Set the number of recurring bookings to 5 with a frequency of 'Every day'.
- The sequence of bookings totals 5 - running from Monday to Friday.

If the start date of the first recurring booking is before the source booking, a new booking will be created for the start date and every recurrence after that, including the source booking. Example:

- A source booking has a start date of Monday March 13th.
- Right click on the source booking to create a recurring booking.
  - Change the start date - Friday March 10th.
  - Set the number of recurring bookings to 5 with a frequency of 'Every day'.
- The sequence of bookings will total 6, running from Friday to Thursday.

Advancements to 'Change job/phase/stage' modal window (3665)

Advancements to the 'Change job/phase/stage' modal window include:

- 'Save' button renamed 'Update'.
- Options on the 'Update' button:
  - Update
  - Update this & similar future bookings
- Staff resource, client, job, phase, stage and charge code fields can be updated.
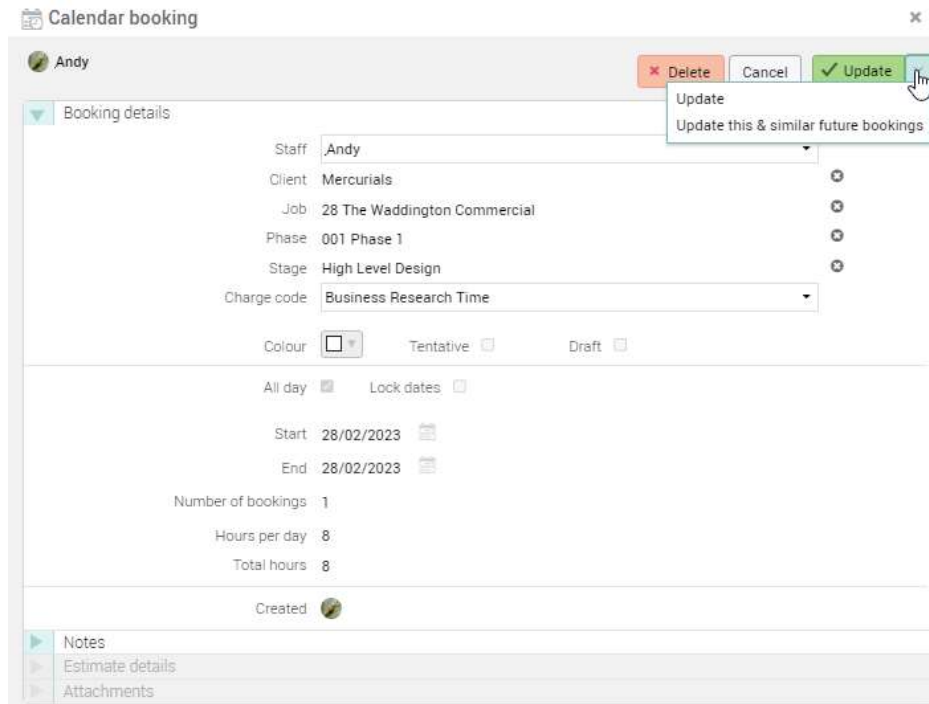
Please note that non-working days are accounted for when changing resources.

Colouring bookings (5733)

'Colouring bookings' has been added to Preferences in Calendar bookings and My calendar enabling the user to control the way colours are used. Upon selection, a note appears below the field with an explanation.
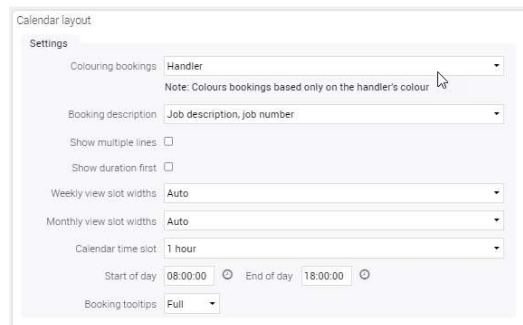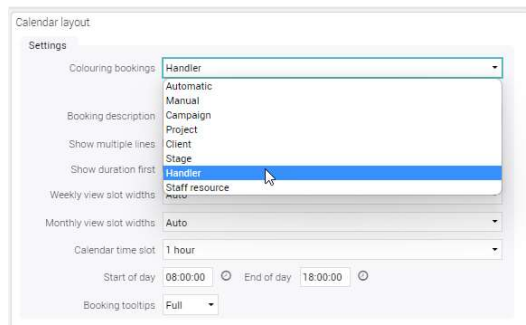
'Select a requisition' option added to bookings

Using the new 'Select a requisition' button, this feature enables users to draw a booking on the calendar and then link it to an available requisition without the need to drag and drop from the calendar bookings requisitions list.
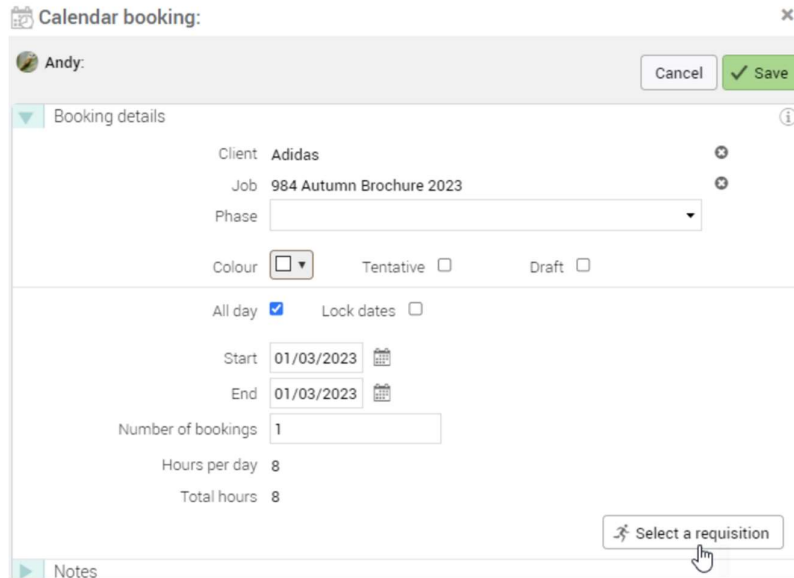
On clicking the 'Select a requisitions' button, the right-hand side panel displays a list of available requisitions. Note: If there are no available requisitions, the right hand panel does not appear and a screen prompt appears.
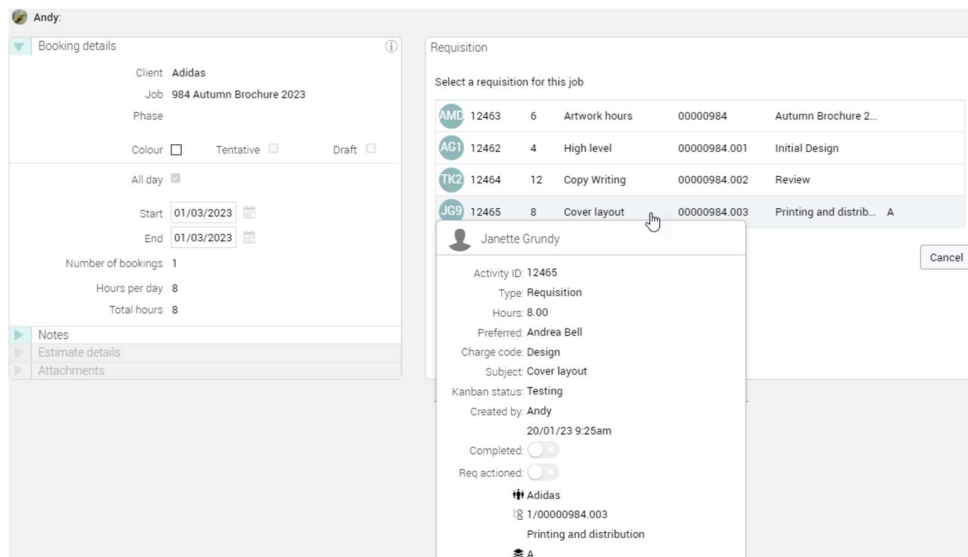
On selecting a requisition from the list, the details appear in the right-hand panel. Click the 'Unlink' button to unlink a linked requisition from the booking.

Caution message added in calendar preferences (4972)

Under the 'Loading' header in 'Calendar preferences' messages have been added below the tick box options 'Show available hours in loading view' and 'Show available hours when there are no bookings (can slow down the calendar refresh)'. As shown below the messages caution about what is being included in the option for

performance reasons.

Search included for requisition numbers in calendar (3725)

The search bar now identifies requisition bookings by highlighting the staff resources containing the same requisition number.

Export Estimate List (3715)

Click the 'Export' button to export the current Estimate or Requisition list in a CSV file.
Please note that the order of the columns in the export does not match the order of the columns in the list.

Dashboard

New tooltip on 'Calendar summary' (3663)

Position the cursor over the 'Date' column to view the tooltip.

Colour amendments to 'Feedback status' panel

For improved clarity and understanding, pie chart and bar chart colours now match.

'Target (chargeable)' line added to 'Booked vs hours required' panel (4178)

A 'Target (chargeable)' line has been added to the 'Booked vs hours required' chart. The line is calculated from the summation of 'Target chargeable hours' as set in the staff resource in File maintenance.
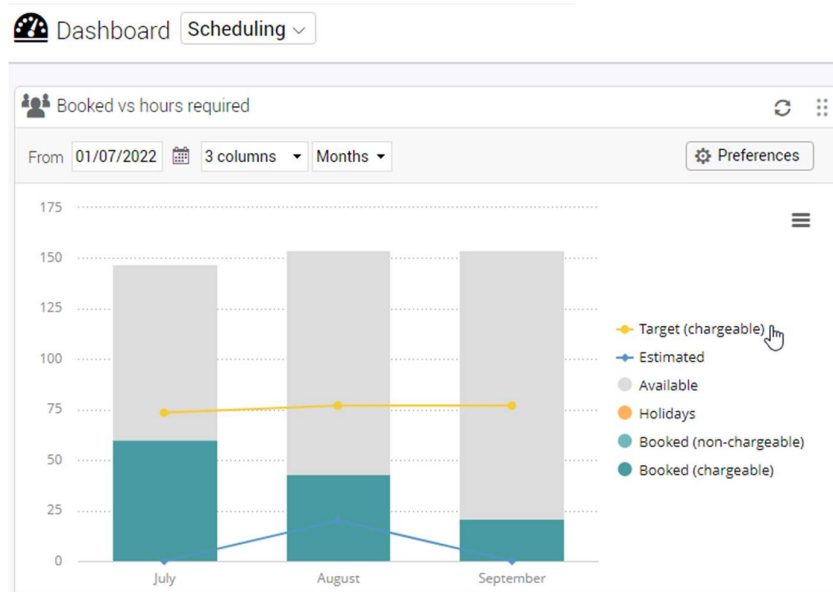
Sales dashboard label change (4182)

'Target available hours' has been renamed to 'Target chargeable hours'.

'Targets & jobs' shows inactive handlers if targets are set (4848)

Inactive handlers on jobs and phase are listed on the 'Targets and jobs dashboard' if their targets are still set. When their targets are removed, inactive handlers are removed from the list.


Validation added to date range selections (5246)

When selecting date ranges that are invalid for example April 2022 to January 2021, the dates will auto change to the last one to be selected. This ensures all date searches are valid and safe confusion if the wrong one was selected by accident.
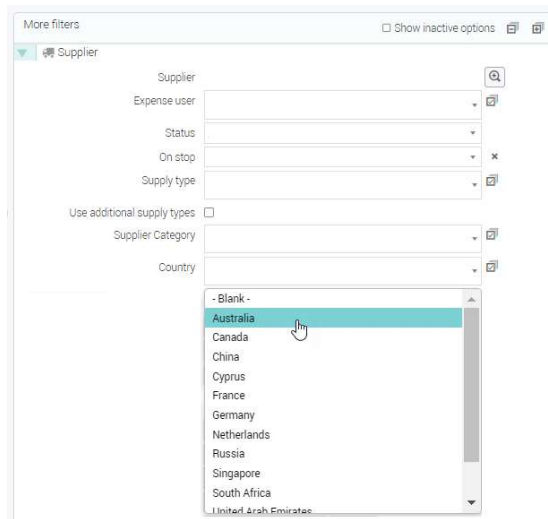
Suppliers

Existing supplier price codes cannot be overwritten or duplicated (3691)

Attempting to create a new supplier price using an already existing price code results in an error message.
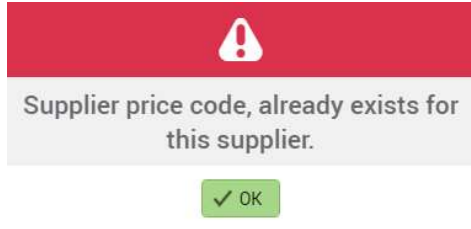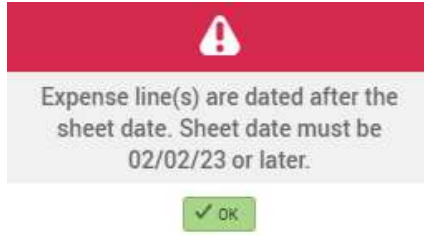

'Country' added to Supplier filter (5001)

Expense entry/approval

Expense sheet date warning (3710)

On submitting an expense sheet, if any expense lines are dated after the expense sheet date, then a warning message is displayed. The expense sheet date or the expense line date must be changed before resubmitting.

Gantt

'Completed' and 'Inactive' indicators (3770)

On the Gantt tooltip:
- Completed jobs and phases are tagged as 'Completed'.
- Inactive stages are tagged as 'Inactive'.

Job numbers and descriptions shown on Gantt (3820)

Job numbers and their short descriptions are shown on the left-hand side of the Gantt and in the middle of the bars, too.

Activity icon and colour (3822)

The activity icon on the left-hand side panel is always orange.
- If the activity record has an assigned colour, the activity on the Gantt calendar defaults to the assigned colour
- If the activity record doesn't have an assigned colour, the activity on the Gantt calendar defaults to orange

Changing the subject of an activity (3823)

In the Gantt left-hand panel, double click on an activity subject field to edit the description. To save changes, press 'Enter' on the keyboard or click away from the field.

'Show date columns' (5070)

A new section has been added to the Gantt chart preferences window - controlling the display of the 'Start' and 'Due' columns.

Estimate

Duplicate purchase estimate with prospect supplier (3905)

Purchase order estimates can now be duplicated when the supplier is a prospect. Previously, this was only possible with actual suppliers.

MyCalendar

Change to 'Completed' feedback colour (4057)

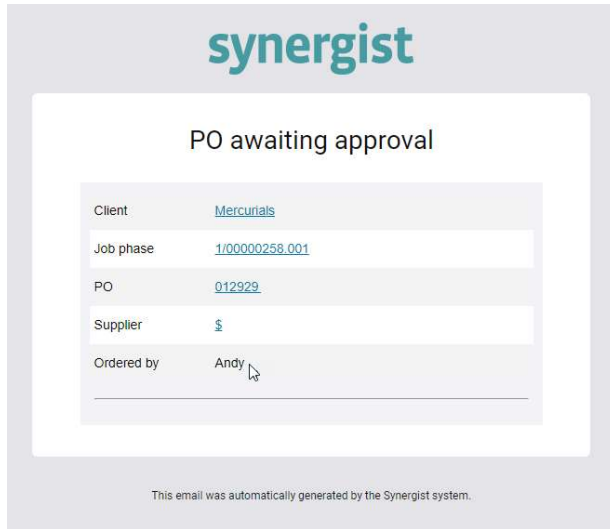The 'Completed' feedback colour has changed to a darker shade of green.

Purchase orders

Purchase order creator added to the 'PO awaiting approval' email alert (4064)

'Ordered by' is a new field on the 'PO awaiting approval' email alert, which displays the name of the purchase order creator.

'Received' column and tick-boxes added to Purchase order lines (3686)

A 'Rec'd' (Received) column has been added to purchase orders, with checkboxes on each line.
On refreshing or revisiting the record, it displays the date the checkbox was ticked. To turn this feature on, navigate to Company settings > Switches tab, and tick option 'Received option for PO lines'.

Purchase order approval tiering with 'Team only approval' (3904)

The 'Purchase order approval level' dropdown menu, located on the User record > Access tab, replaces the 'Purchase order approver' checkbox. The dropdown menu includes 'Team only approval' so that alerts are only sent to PO approvers in the same team.

Campaigns

Colour picker added to Campaigns and Projects (4094)

📣 Campaign: **Spring and Summer 2023**

| Details | Jobs | Phases |

Campaign Name Spring and Summer 2023

Notes

Colour ☐

Complete
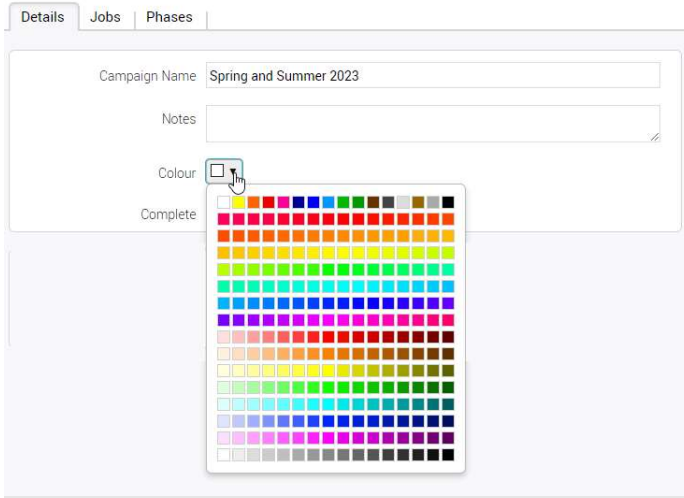
Time and Expenses

Days not worked greyed out on Weekly timesheets (4879)

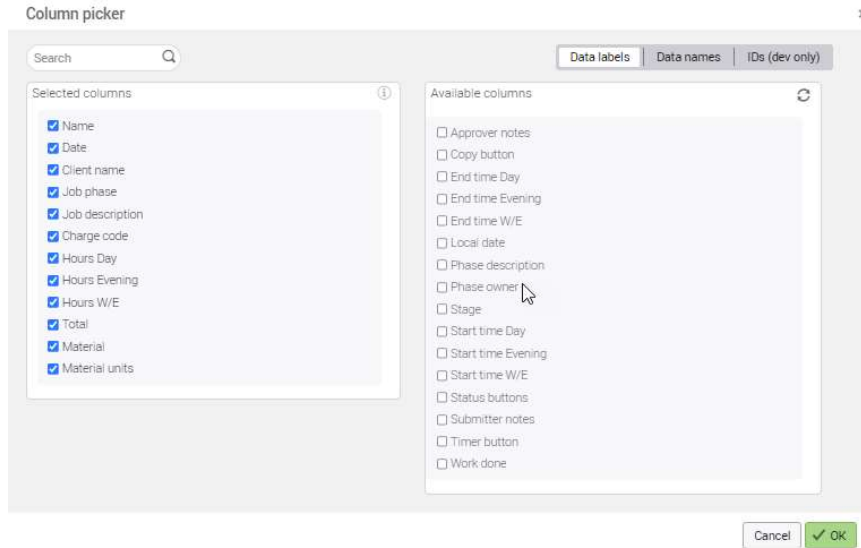Non-working days on the staff record are greyed out in 'Weekly timesheet'.

'Phase owner' added to column picker in Daily timesheets / Timesheet approval (5981)

The 'Phase owner' column can now be added to 'Daily timesheets' and 'Timesheet approval' via the column picker.

Miscellaneous

'Client – Code' dependency added to user defined fields (4643)

'Client-Code' dependency has been added to the following lookup and custom field tables:

- Job Header
- Job Phase
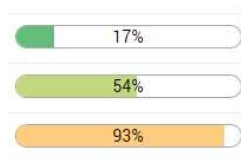- Contacts
- Organizations
- Activities

When selecting the 'Client code' dependency, type in the specific client ID's using a comma separated list.

Restyled thermometers (4120)

Thermometers on main lists have been restyled from a block shape to a new, easier to read design.

Importing invoices from Xero enhancement (5546)

Xero multi-line purchase invoices can be imported into Synergist via 'Accounts link' and left clicking on the import, makes the associated invoice lines visible. Using the 'Pick' buttons in the Purchase Order column now allows you to assign invoice several lines to the same purchase order.

Analysis types support added to Sage Business Cloud Accounting integration (6264).

Transactions posted with additional attributes on a Synergist nominal code can now be transferred into the 3 transaction analysis types available in Sage BCA

'Export current view' on all main lists (4842)

An additional export option has been added to all main lists – 'Export current view'. The data in the exported CSV matches the current views columns and column order.
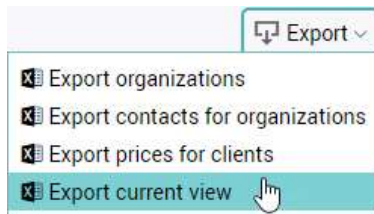
'Tab list name' setting (5518)

The new 'Tab list name' setting controls the name of the view on tabs in main lists. If 'Show view names' is selected, then name of the view is displayed on the tab as well as in the page header. Please note that hovers on the tab always display the generic name.
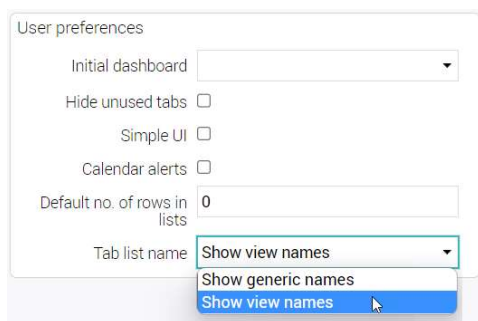
Single select check boxes changed to dropdowns (3565)

Single select checkboxes have been changed to dropdowns in the following areas:
- List filters
- Report filters
- Data viewer filters

Each dropdown has three options, one of which is a blank selection at the top.

Billing Plans (Addendum - March 2023)

Hide quick add feature at job level (7305)

We have added an option to hide the quick add feature depending on which billing plan company settings are being used. For example, if the settings are set to phase only billing plans (company settings > billing plans) it will hide the feature at job level.

Billing plans

☑ Enable billing plans

Billing plan levels allowed [Phase only]

☑ Hide quick billing plan on job header

Quick billing plan to allow entry of 'Recognised' values (7289)

When using quick billing plan (under actions on BP tab), we have added the ability to enter recognised values if 'revenue recognition' is turned on.

Total quoted for selected phases: £0.00

Date	% of quot...	Value(£)	Recog v...	Recogni...	Offset
01-03-23		0.00	☑	4	0
Total per ...		£0.00			

Phase description added to job record, billing plans (7240)

Added a hover to the billing plan table in the jobs area, mousing over the phase number will show the phase description and details.

Phase column sorting on the job billing plan table (7288)

Added the ability for sorting on phase, date (month/year) columns in the billing plan table within jobs.

[End of Document]