Version 10.25 release notes
Nov 2011

Please note: key items are highlighted in red in the index

LOCALISATION

Support for user working in different countries / time zones

Synergist has been enhanced to support users working in multiple countries / time zones. For instance, you may have your server located in the UK but have a company located in the USA. In this case when American users log in to the system from their remote location, typically using a remote desktop connection and/or the staff portal, they will see dates formatted in the US style and account is taken for differences occurring due to time zone issues. In addition to this certain labels can be configured to use local preferences. E.g. “mobile phone” can be described as “cell phone”. Please note: the work allocation calendar uses floating time rather than real time.

For more details on this feature please refer to the document Synergist Localization 2011.pdf

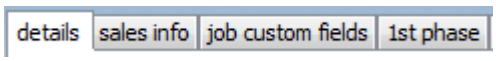
JOBS & PHASES

New job – interface developments

On clicking “New” from the job list …

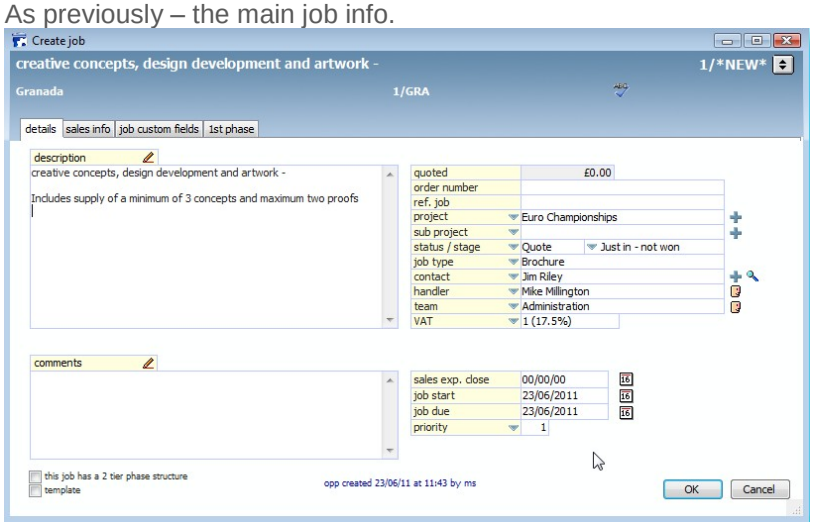
The system will provide a multi-tabbed form – to enable you to enter all key information before finally creating a job. This makes it possible to enforce more mandatory fields, since these must be entered as a condition of creating the new job.

Notice you have a selection of tabs. If you have set up user defined fields you will see addition tabs for these as well.



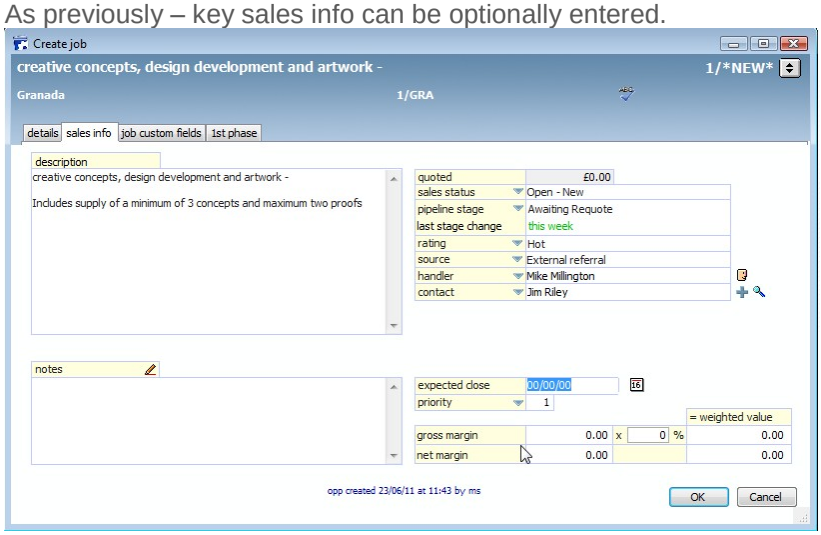
Details

As previously – the main job info.



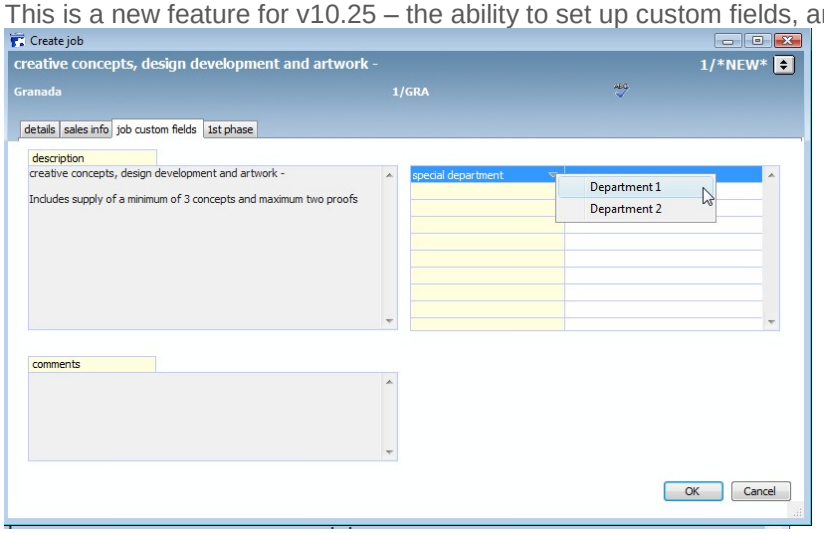
Sales info

As previously – key sales info can be optionally entered.



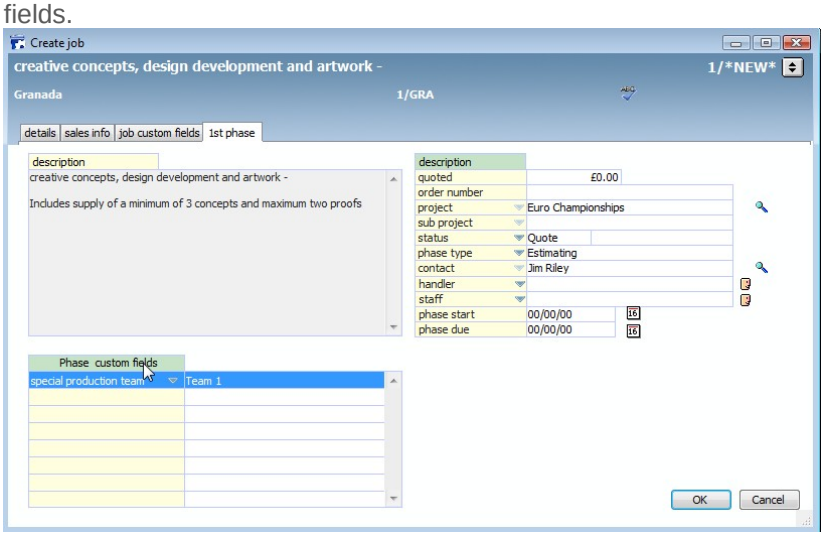
Custom fields

This is a new feature for v10.25 – the ability to set up custom fields, and make them mandatory.



1st phase

Again, new to v10.25, you get the option to enter key data for the first phase of the job being created. This enables the user to enter mandatory fields, and enter data into any new phase level custom fields.



If the user fails to enter data in any fields that have been designated as mandatory he/she will be unable to create the job.

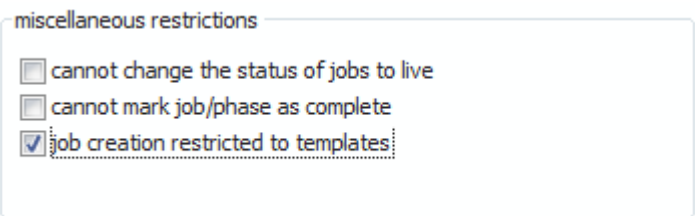
Templates – projects & sub-projects

When creating a job from a template you can now copy over the project & subproject (sometimes called “campaign”). However, this is only allowed if the client selected for the new job is eligible to have the selected project/sub project.

Templates – mandatory option

A user can be restricted to creating jobs only from templates / existing jobs. This can be useful to ensure all jobs created by general users are based on a template.

Setting on user card:

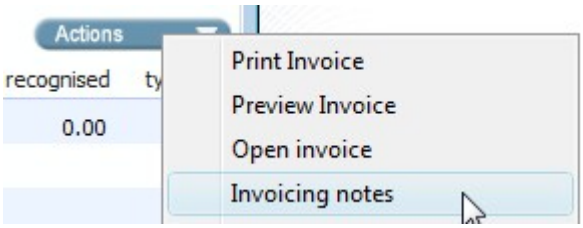


Current stage tab – job & phase

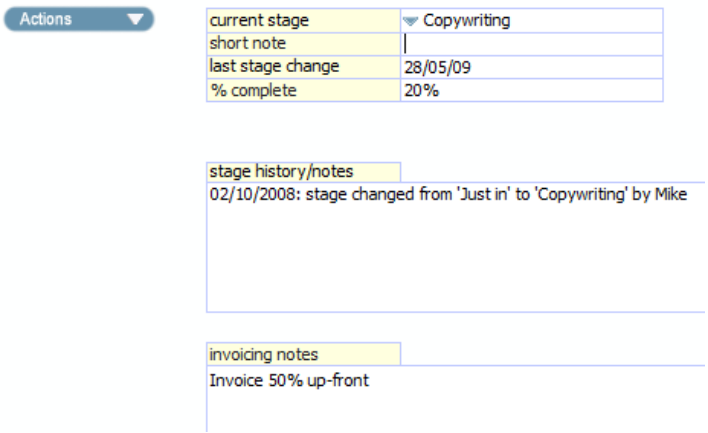
Two fields previously only accessible from the financial page are now available on the current stage page.

- **% complete**
  This is the % complete for the entire job/phase (not the % complete for the stage).

- **Invoicing notes**
  These are general invoicing notes applicable for this job/phase. These should not be confused with the invoicing notes visible on an individual invoice. This is for info only. Previously you could only view this information from a pop-up window from the actions button of job's invoice list:



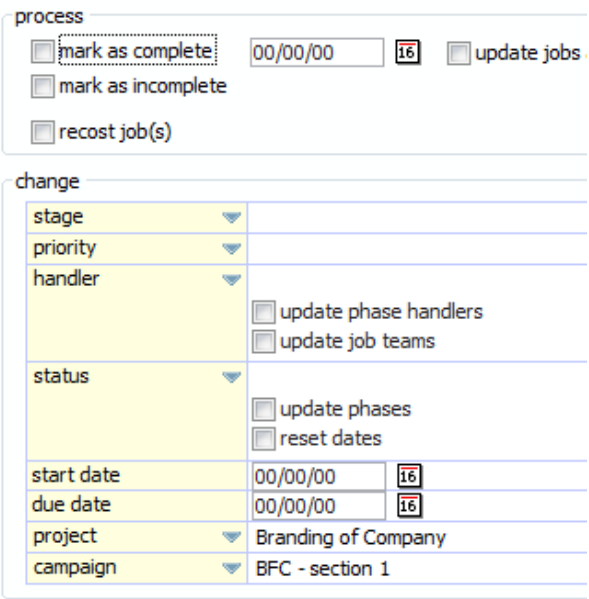
Now it is also available on the current stage tab:



Job/phase batch update

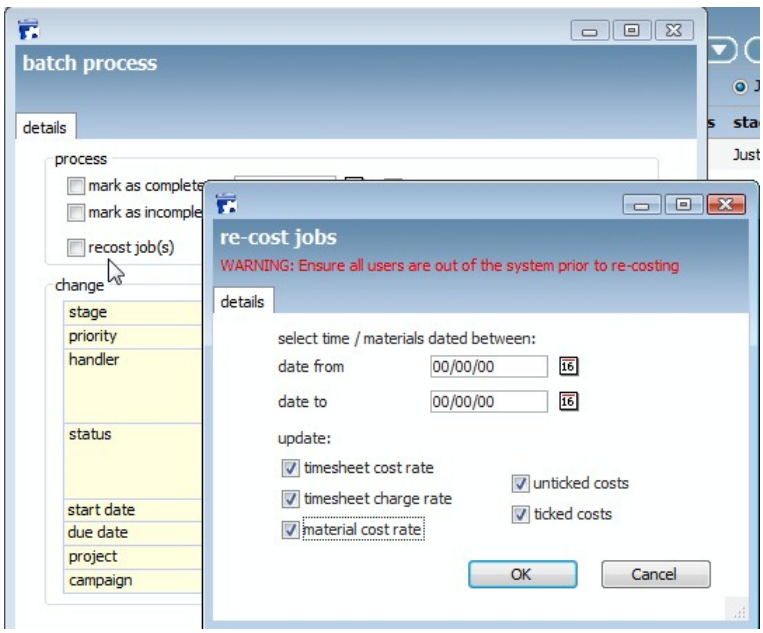
Projects & sub-projects

The batch update feature now supports allocating projects and sub projects. The system will apply business rules and ignore any jobs that are not allowed to be allocated to the selected project / campaign. The system will report any such issues after the routine has been run.



Re-cost

The re-cost feature, normally run via the utilities menu, is now also available in the batch update option under the actions button of the job/phase list. This option should be used if you wish to re-cost a selection of jobs.



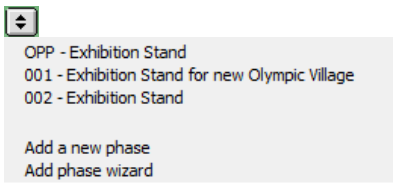
New Phase wizard

We have added a new wizard to help users quickly and easily add new phases to jobs in Synergist. It is also used when duplicating a phase. The wizard is available in both the full client and web browser versions of the system.

This new wizard gives the user the opportunity to select all the key fields when creating a phase including the new custom fields. If any of these fields are mandatory the wizard will not let the user proceed to the next page unless the required data are correctly entered. Options to copy over other key data like quotes & estimates are also provided.

Add phase wizard

On the job/phase card you may see a new option “Add phase wizard”.



Page 1 of the wizard

The initial page offers the option to create more than one phase. When this option is chosen the choices made in the wizard are applied to all the phases newly created.

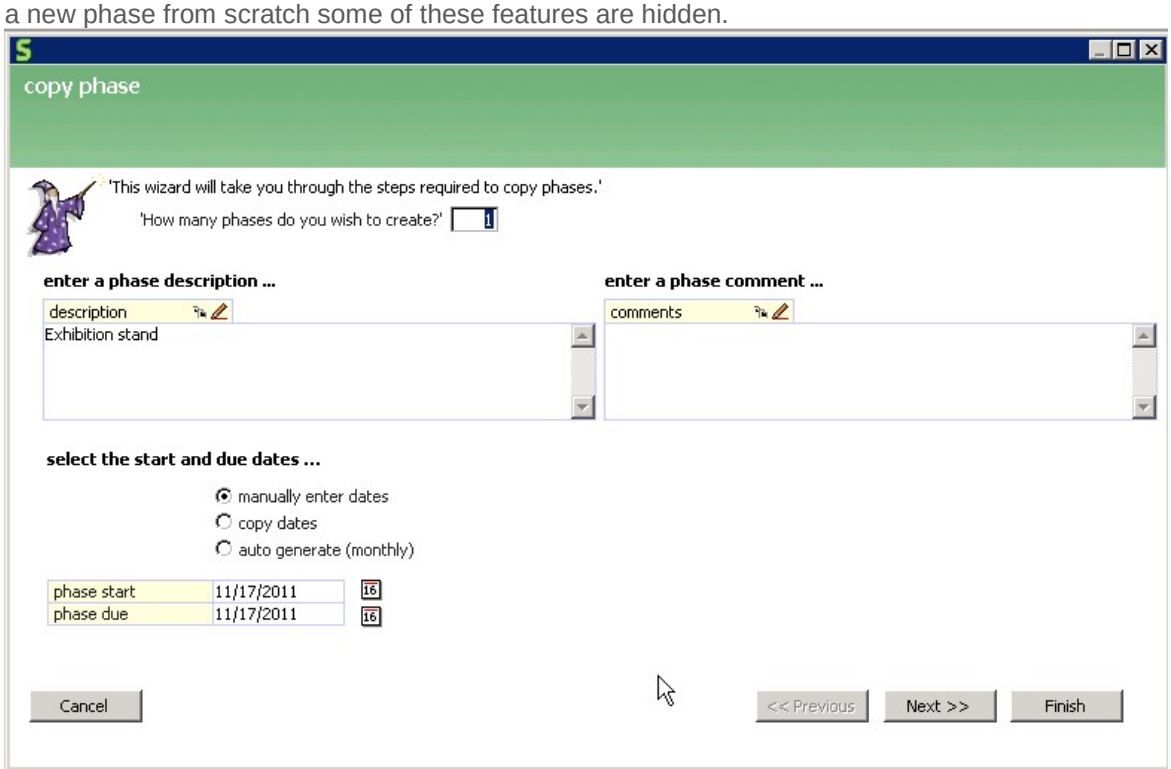
Description & comments

You can type in a new description & additional comments if required.

Dates

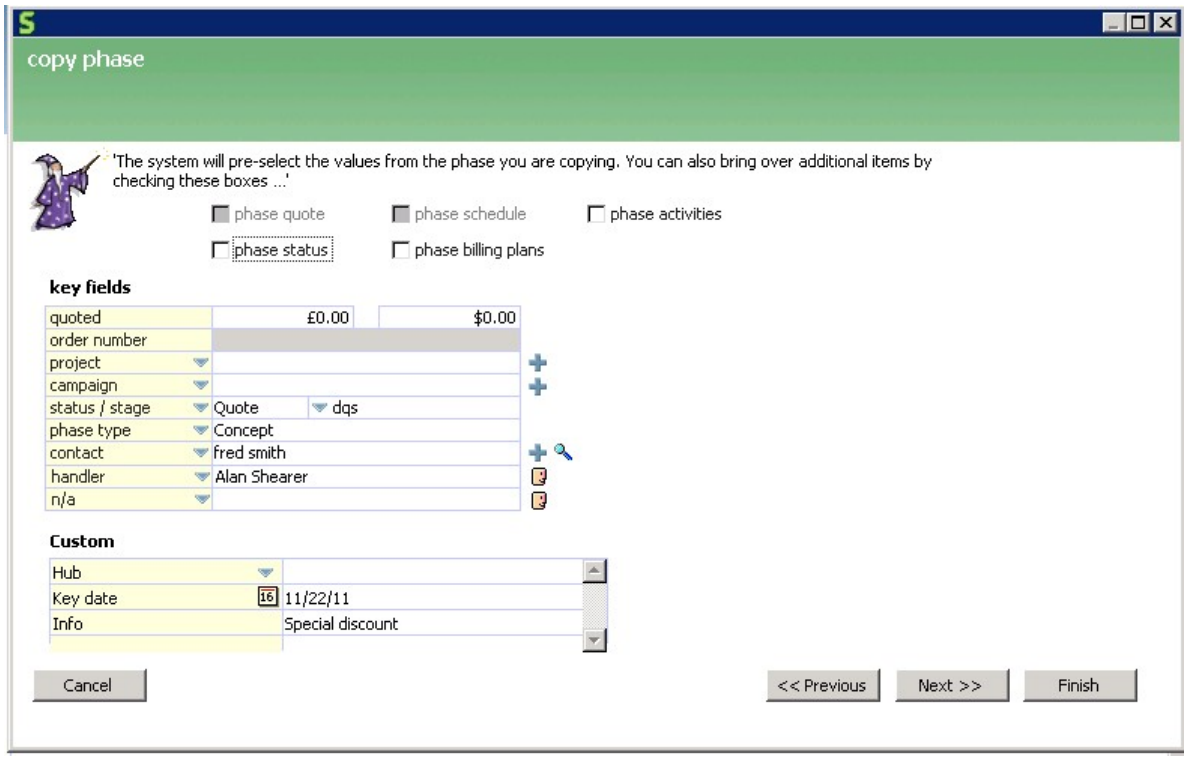
You can type in a start and end date, or copy these from the source phase. The “auto generate” feature is used for creating a set of monthly phases (often used for retainer jobs).

Note: This example uses the “duplicate” feature in order to show all the options. When simply creating a new phase from scratch some of these features are hidden.

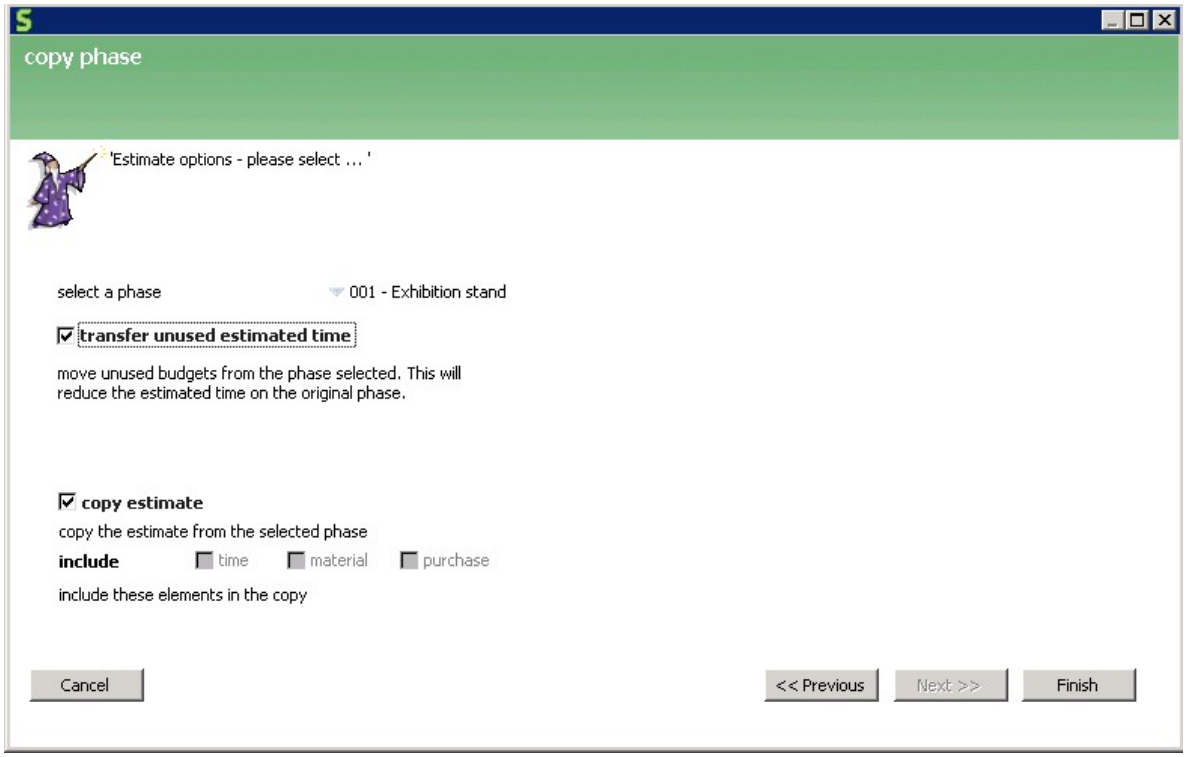


Page 2 of the wizard

Key fields including custom fields. Any fields that could be made mandatory are included on this page. If you are “duplicating” a phase these fields will default to the values of the phase you are copying. Otherwise these fields will have the normal defaults you are used to, dependant on your system setup.



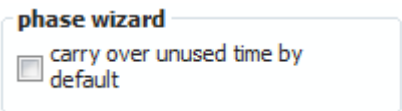
Page 3 of the wizard
Options to copy estimates and a new feature to enable the user to transfer unused budgets over to the new phase.



Transfer unused estimated time.
This new feature enables the user to transfer remaining budgets from previous phases. The system looks at the difference between the estimated time and the actual time (time sheets) posted to a previous phase. If there was more time estimated than actually used the balance can be transferred to the new phase. The previous phase is not automatically marked as completed – this needs to be done manually, or the phase final invoiced or written off.

By default this new option will be greyed out. However, even when simply adding a new phase the user can select a previous phase to transfer budgets if required.

For companies who wish to set transferring budgets as the default behaviour when adding phases a parameter is available on the “advanced” page of the company settings



If this option is selected the system will preselect the previous phase and will transfer over remaining budgets as described above

Copy estimates
This feature was previously available. It only appears when the user selects to duplicate a phase

Notes re: the phase wizard

- If you have selected to make any phase fields mandatory you will always be presented with the new phase wizard when you click “Add phase”. This is necessary since the user needs to be able to enter data into any mandatory fields. In this case you will not see the “Add phase wizard” option on the dropdown list.

- Users can click “finish” on any page of the wizard – it is not necessary to select every page of the wizard. However, if the system finds data is required (for instance – for a mandatory field), then the wizard will require that the data is entered.

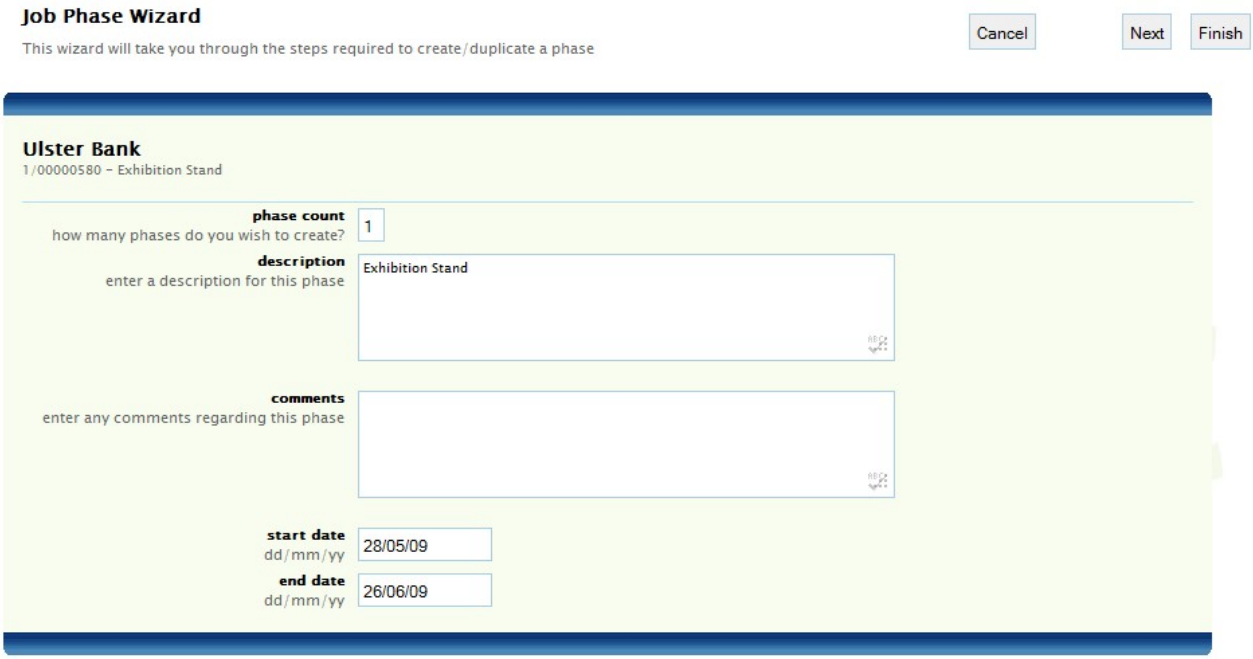
- Users who have set up “old style” phase level custom fields will be provided with an additional page for entering data into these fields

- The option to “bring over additional items” on page 2 only appears when you are duplicating a phase.

New Phase wizard – web portal version

Page 1 – example page

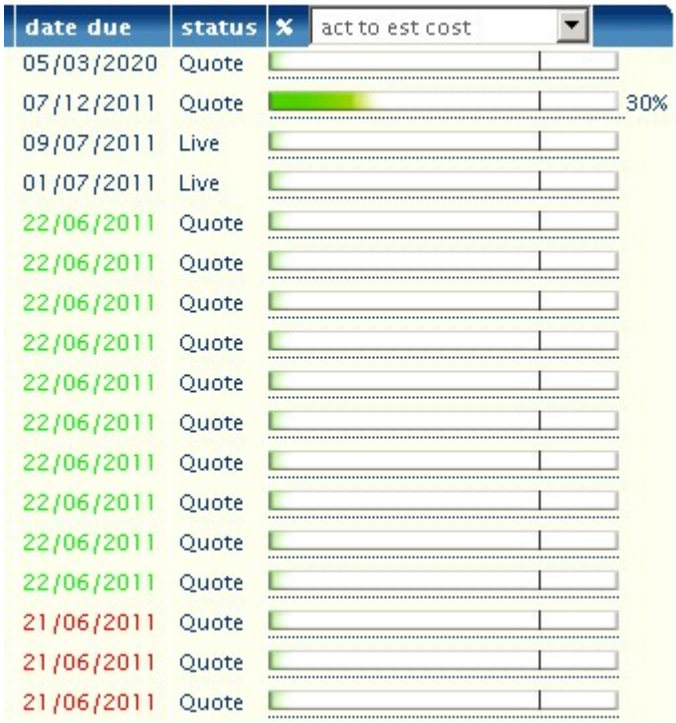
Note: the web version of the wizard does not have the facility to create a set of monthly phases.



Job list – web portal

Due date is colour coded on the web – the same as it currently is for Synergist 4D.

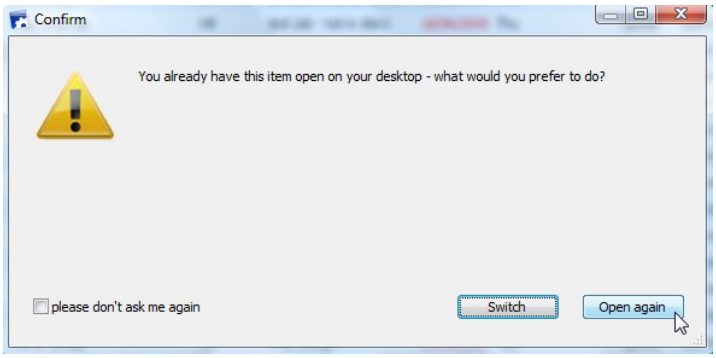
Red – overdue
Green – due today
Blue – due this week
Black – not overdue – due in the future



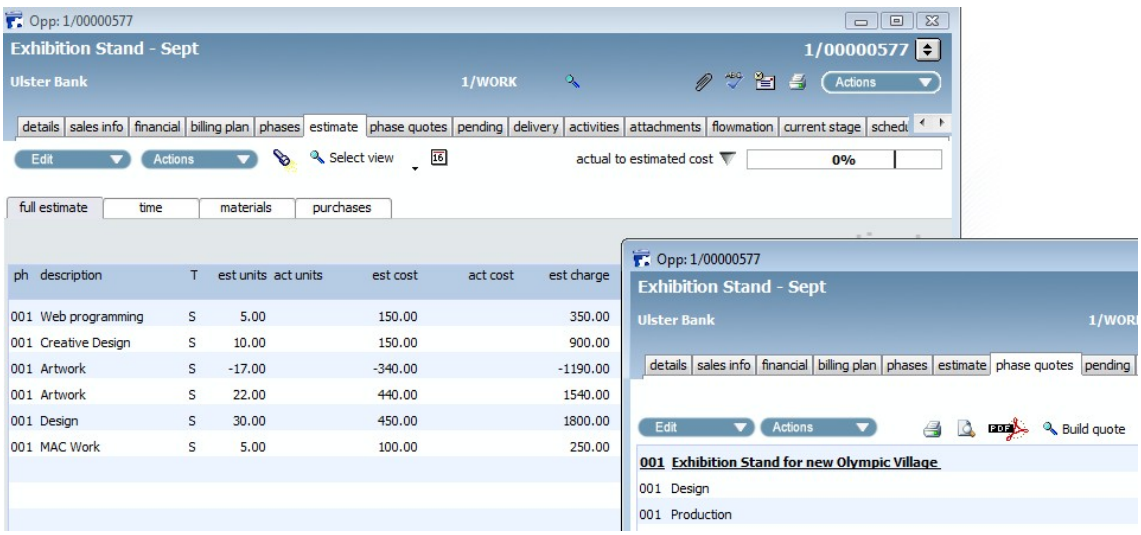
Opening records multiple times

This new feature applies to jobs/phases/client cards etc. When opening a record that is already open on your Synergist desktop you have a choice. You can either simply have the system set focus on the window that is already open, or you can open up a second copy of the record in a new window - in read only mode.

This feature is useful if you want to have a second copy of a record open while working with the initial record. For instance, you may be building a quote and wish to view the estimate page at the same time. To do this simply select “open again”.



You now have the same job open in two separate windows.



Setting a default behaviour

In order to set a default behaviour so you are no longer asked the question.
Check this box:

[X] please don’t ask me again

The system will then automatically behave according to your choice in the future. To ensure it follows the current behaviour, check the checkbox and select “Switch”.

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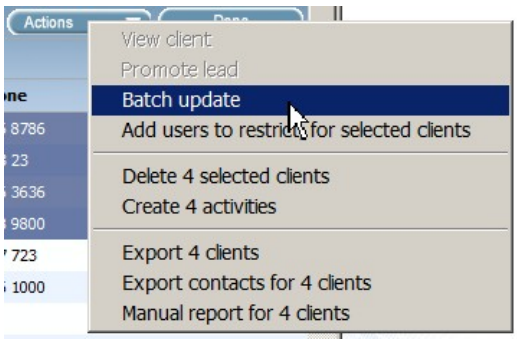
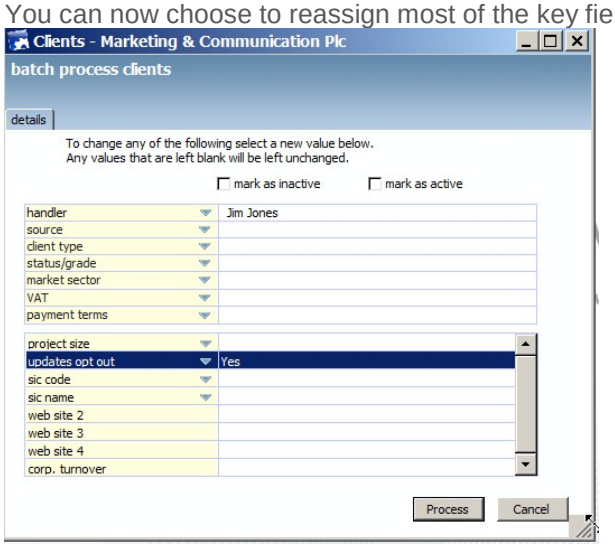
CLIENTS & CONTACTS

Actions button – batch update

This option enables you to easily batch process sections of your organizations table (clients / prospects / leads). First select the items you wish to update using a view or the “torch” screen. Highlight the selected items and select “Batch update” from the actions button.

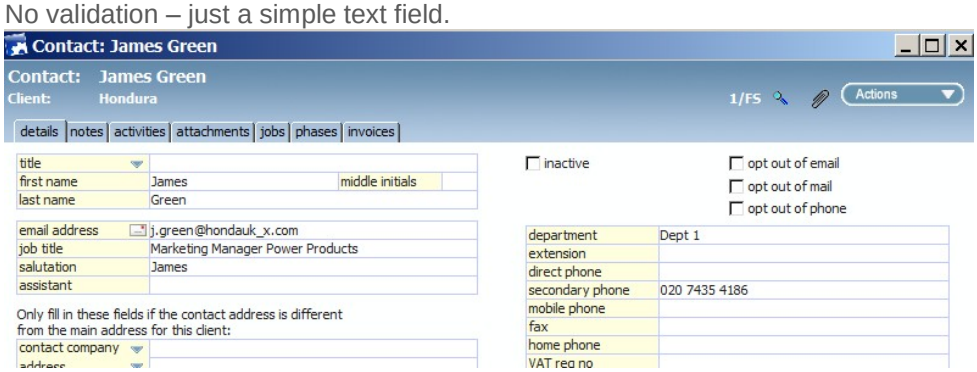


You can now choose to reassign most of the key fields, including custom fields, to new values.



New field on contact record “Department”

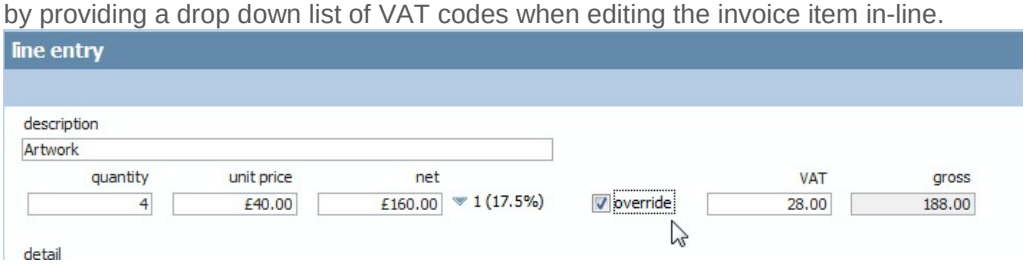
No validation – just a simple text field.



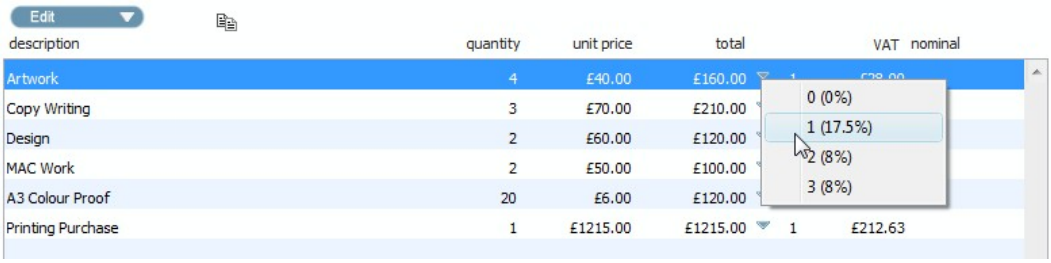
SALES INVOICING

Ability to override the VAT amount

You can select to override the VAT amount on an invoice line. The interface has also been improved by providing a drop down list of VAT codes when editing the invoice item in-line.

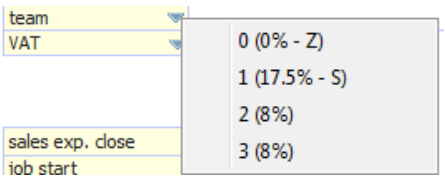


In the multi-line view the VAT rate can also be selected from a drop down list.



VAT – additional codes

Some accounts systems require different codes when transferring over transactions. In this example "Z" denotes a zero rate VAT while "S" designates that this is the standard rate. These codes are now displayed on data input.



Separate approval for credit notes

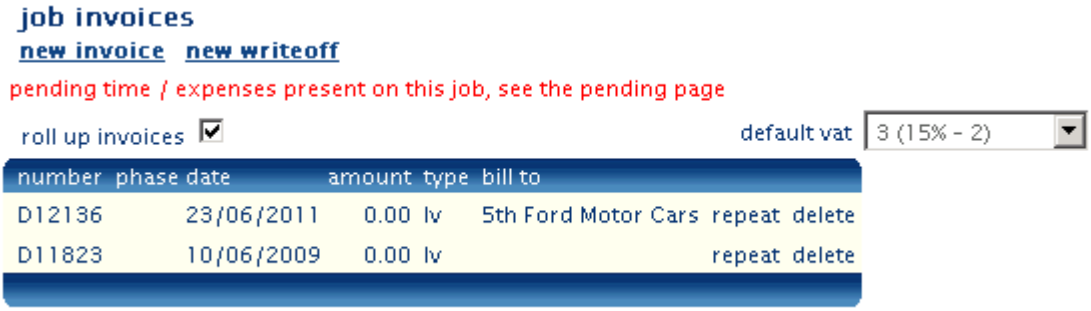
Each user record can now have separate permissions for approval and conversion of draft sales credit notes. When your system is upgraded, the 3 new settings for credits will reflect the same as the equivalent invoice settings for each user. This will ensure that there will be no change in the current operation of your system in this respect.

	invoice	credit	write-off
allow sales draft ready for approval	☑	☑	☑
allow sales draft approval	☑	☑	☑
allow sales draft convert to real	☑	☑	☑

Repeat invoice feature

The repeat invoice option is now available on the web portal, as well as on the 4D client version.

Sales invoices show the "Bill to" client on Synergist web portal



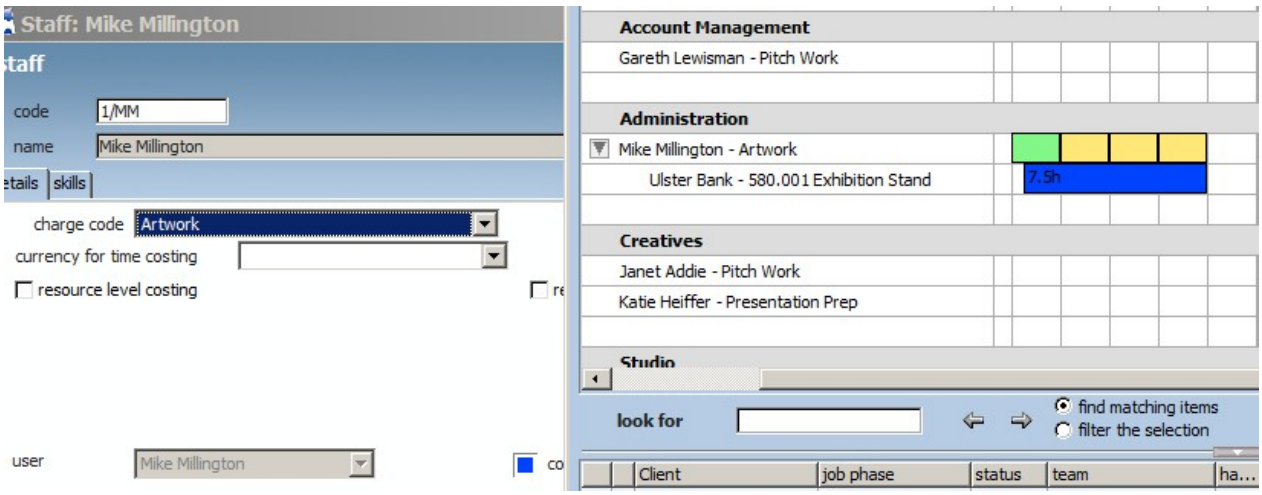
Phase allocations entry

The entry of phase allocations of an invoice has been improved. You can now simply enter the figures directly into the table.

WORK ALLOCATION DIARY

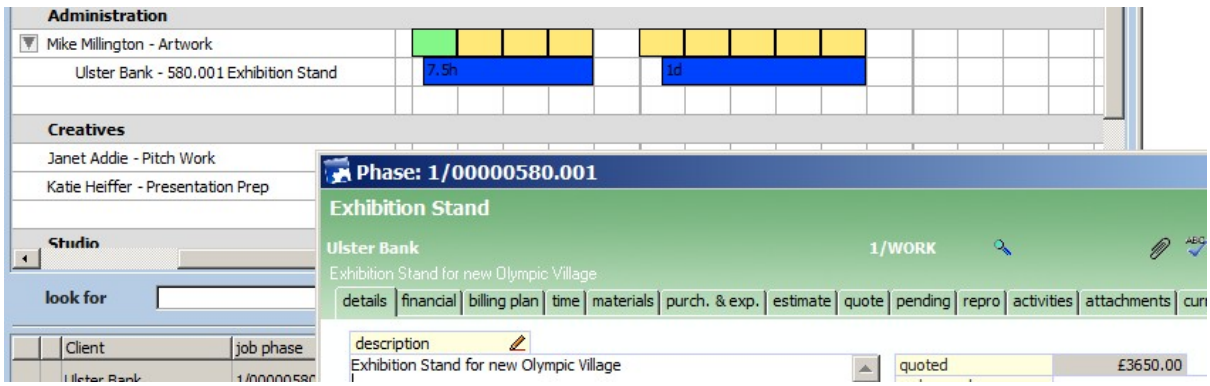
Colouring the diary.

Synergist already supports auto-colouring diary blocks according the current stage of the job. For users who are not using that feature, an alternative has been added – colouring based on the job/phase handler or the resource booked to do the work. In this example all work allocated to Mike Millington is coloured blue by default.



Increased flexibility when allocating tasks

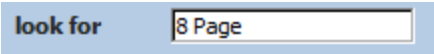
You can now create bookings for a job even if the job is open either on another user's machine or in a separate window on the traffic manager's machine.



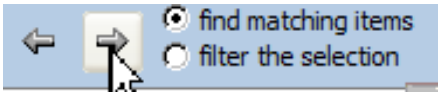
Searching for jobs in the diary job selection list

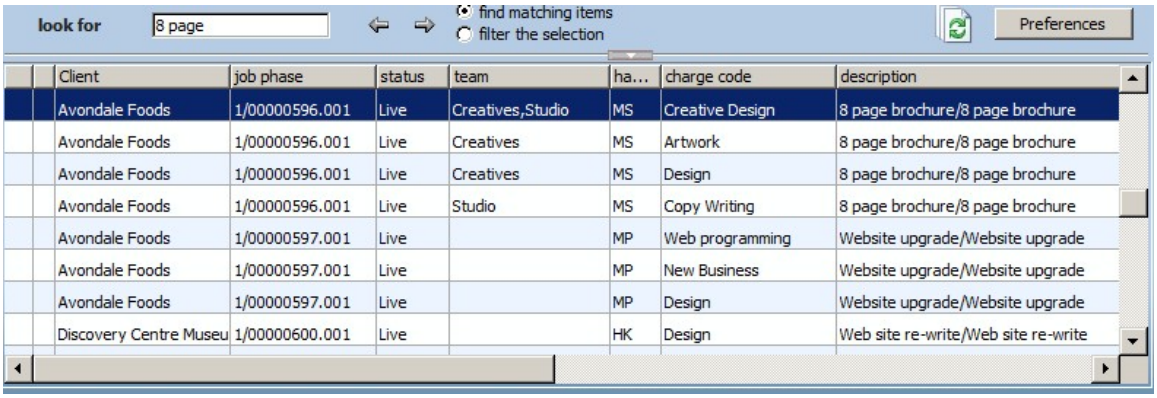
If you wish to search for an item in the job selection list you should first type in a value to search for. You can search for text appearing in any column of the list.

e.g.

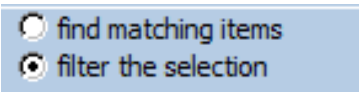


You then have a choice of two methods for searching the list. You can either choose to simply find the first matching item and then click the arrows to navigate to subsequent matches.

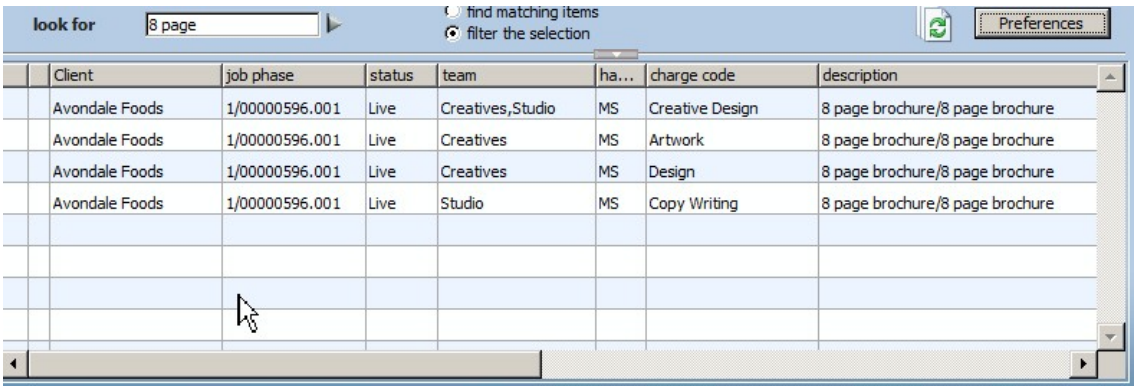




Or, if you choose to “filter the selection”...



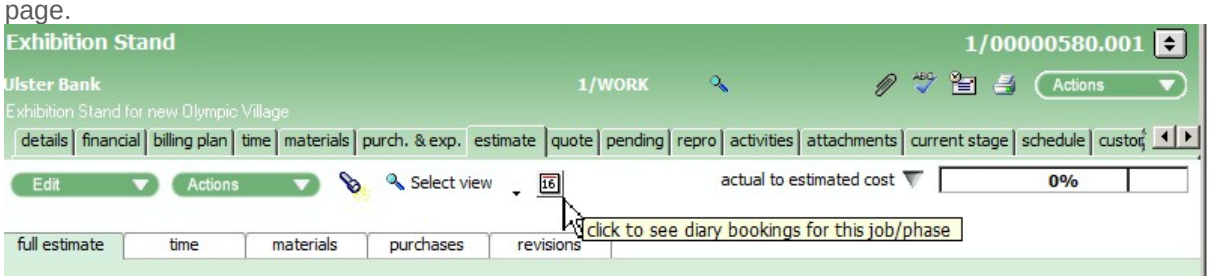
.. The arrows disappear and the list is simply filtered, using your search criteria.



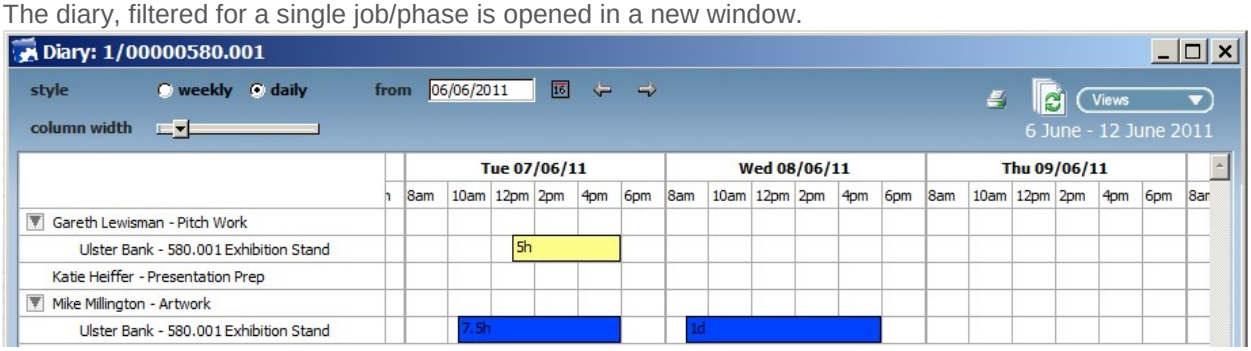
Job and phase view of the work allocation diary

You can now access the work allocation diary from the job and phase card, estimate tab. Click the calendar icon and a new window will be opened displaying the diary bookings for the individual job or phase. This diary is read-only. It is designed to provide handlers easy visibility of planned work on their jobs.

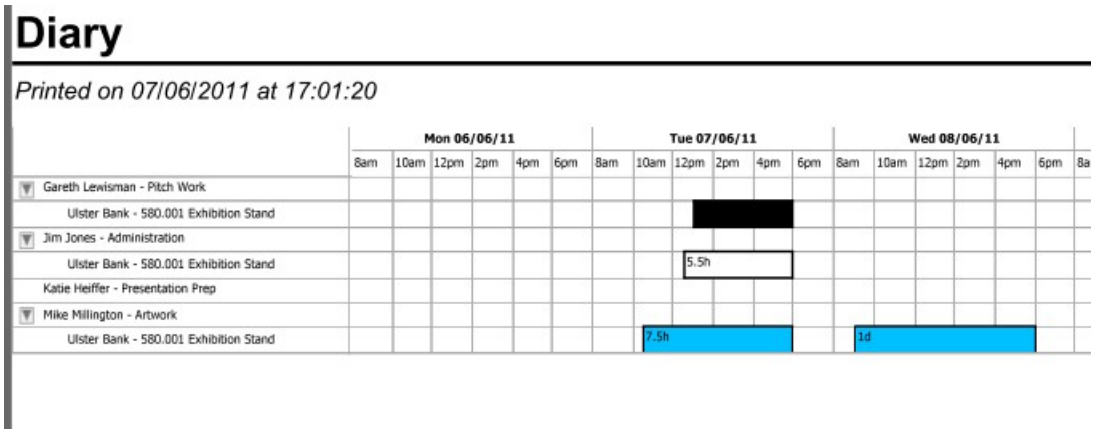
Click the calendar icon on the estimate page.



The diary, filtered for a single job/phase is opened in a new window.



The view can be printed to provide a work plan for the job selected.



ATTACHMENTS

Folders / categorisation of attachments

We have introduced multi-level virtual folders into Synergist. A set of standard folders can be created in file maintenance. Users can then allocate new attachments to one of these folders. Files can be re-filed using drag and drop.
Throughout Synergist, whether in a client card, job card, phase or activity, you have the option of viewing attachments either in a simple list (as it is currently) or in the new virtual folder view:

(The system will remember your choice and apply it to all situations)

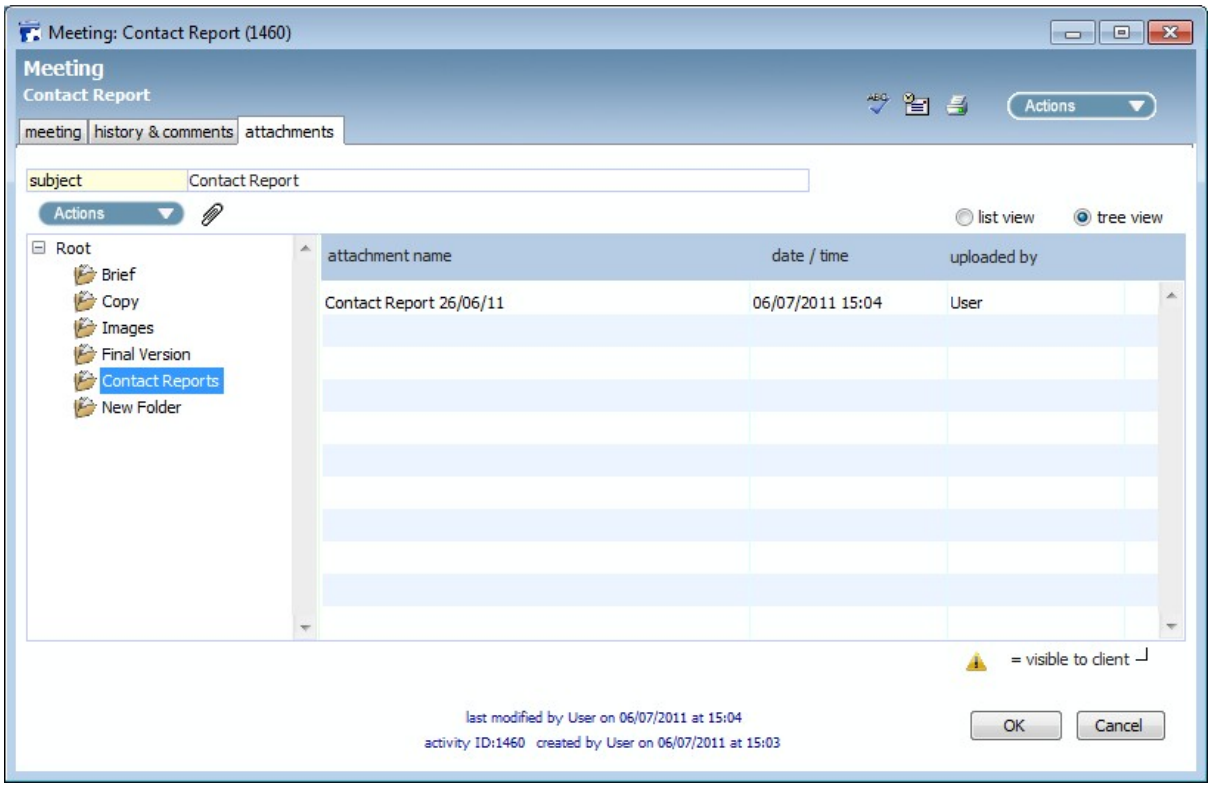
List view

This is the view you are currently using. It simply lists attachments and can be sorted by the column headings.

Note: the warning sign is displayed on systems that are sharing access to documents and activities with their clients via the new client portal module. It is to remind staff that these documents / messages / tasks are no longer to be considered purely internal.

Tree view

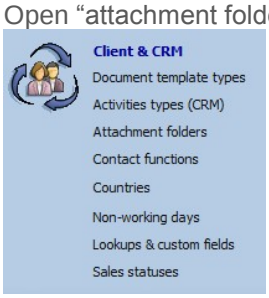
The new “tree view” is designed to provide a more user friendly interface and also give the user the opportunity to categorise attachments by organising the files in virtual folders. The folder structure shown in the left-hand pane is common to all screens and is defined in file maintenance (see below)



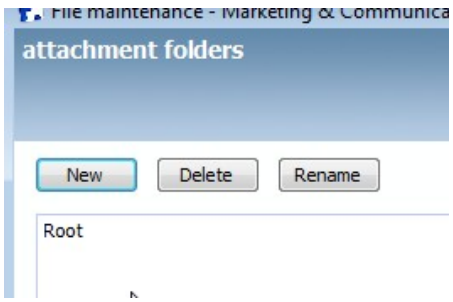
Defining your tree view

The new “virtual folders” can be set up in file maintenance.

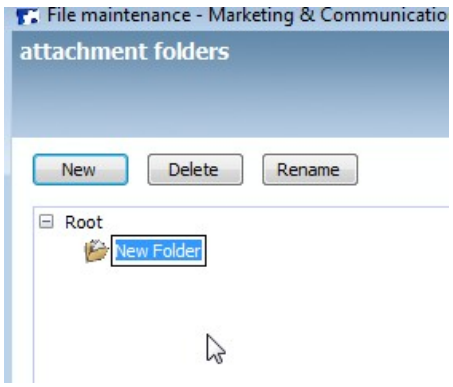
Open “attachment folders”



Initially the system has just one virtual folder called “root”. All your existing attachments are effectively already in this folder.



You can then use this screen to create new folders. Any folders you create here will appear in all tree view attachment screens in the left-hand pane. You can then easily re-file documents so they appear in the appropriate virtual folder. Note: We use the term “virtual folder” since the documents are not physically stored in these folders on disk. The folders are simply used to categorise the documents and provide a graphical view of them with drag & drop features.

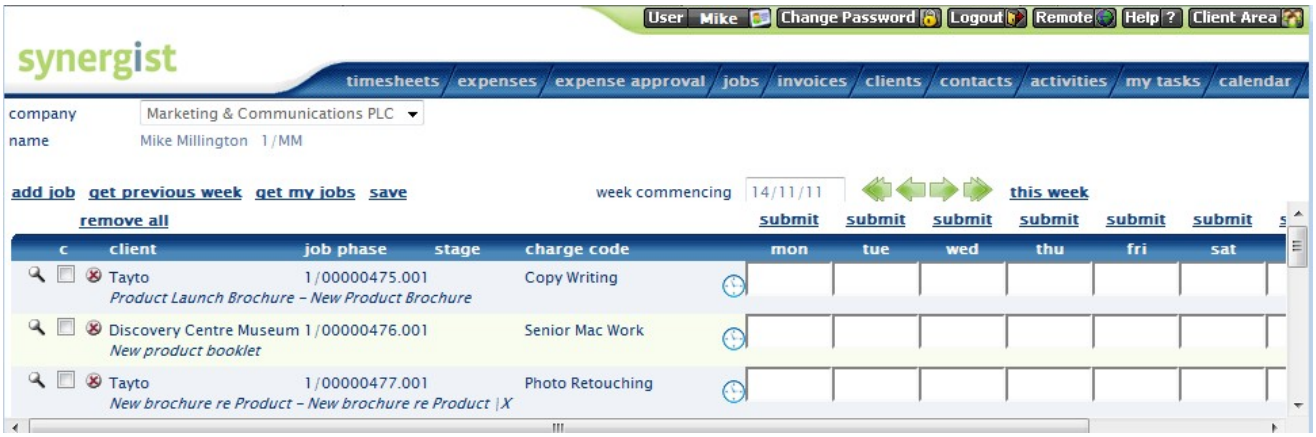


Note: Prior to version 10.25 Synergist had a simple feature that allowed attachments to be filed in folders based on a special activity type. These are no-longer supported but it is easy to re-file documents saved this way into the new virtual folders system. Call the helpdesk if you need any advice on this.

TIME & MATERIALS

Selecting a date in the weekly view

Additional buttons have been added to the weekly web timesheet screen the make it easy to select earlier date ranges. You may wish to do this in order to see previous postings.



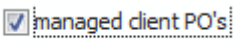
CLIENT PO TRACKING

A Synergist job or phase can currently be issued with an order number to tie the job to your client's sales order. This is adequate for clients who tend to have a one-to-one relationship between sales orders and Synergist jobs or phases. However, it is not unusual for clients and suppliers of services to have a more flexible arrangement whereby a budget is agreed for, perhaps, unspecified work. This budget may then be called off against multiple jobs. What's more a job may share a budget with another job, or a job may leave a budget remaining that needs to be used up elsewhere.

Clearly in a situation like this a more sophisticated tracking system is required. Synergist can now offer this feature by activating the new "Client PO tracking system".

Set-up

To switch this on, open the accounts tab under company settings and check this checkbox.



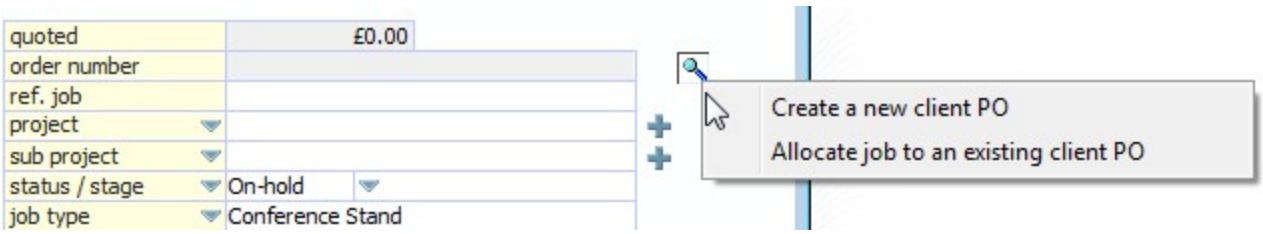
Do the same thing under the financial tab for any clients you wish to manage in this way.

Once you tick this box on a client record, a new tab "Client POs" now appears. Within this tab you will be able to see and manage all the current client purchase orders. The order number, value of the order, and the balance left to allocate to jobs is clearly visible.

Allocating an order to a job

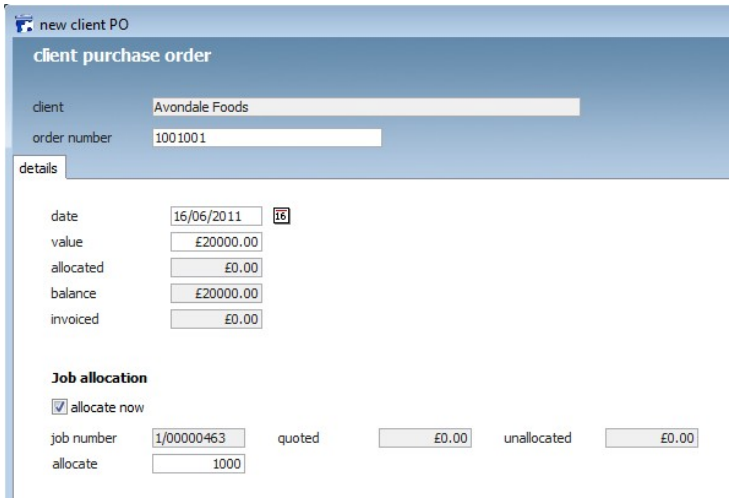
From within the job details tab, instead of simply typing in an order number, this field is now greyed out. To enter an order number you now click the magnify glass and select to either create a new client purchase order, or allocate an existing one to this job.

(Note: this feature is limited to working with entire jobs only; it is not available on the phase tab).



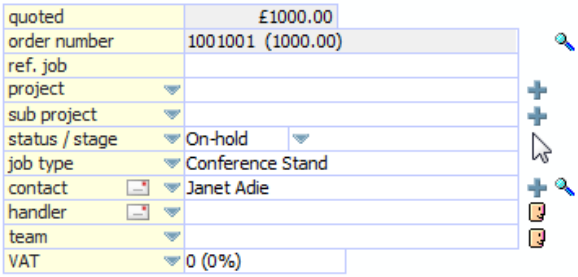
Creating a client purchase order

From within a job, or client record, a client purchase order can be created, and allocated to one or more jobs. If you are creating the client PO “on the fly” from within a job the system will automatically allocate the quoted value of the job to the client purchase order, even if the client purchase order is for a larger amount than the job’s quoted value.



Client PO is part allocated to the job

In this example this job is now allocated to the above client purchase order, and £1000 has been called off against the order.



Client card – client PO tab

You can now see the value of the client purchase order, the balance remaining unallocated, and how much of this purchase order has been invoiced to the client.

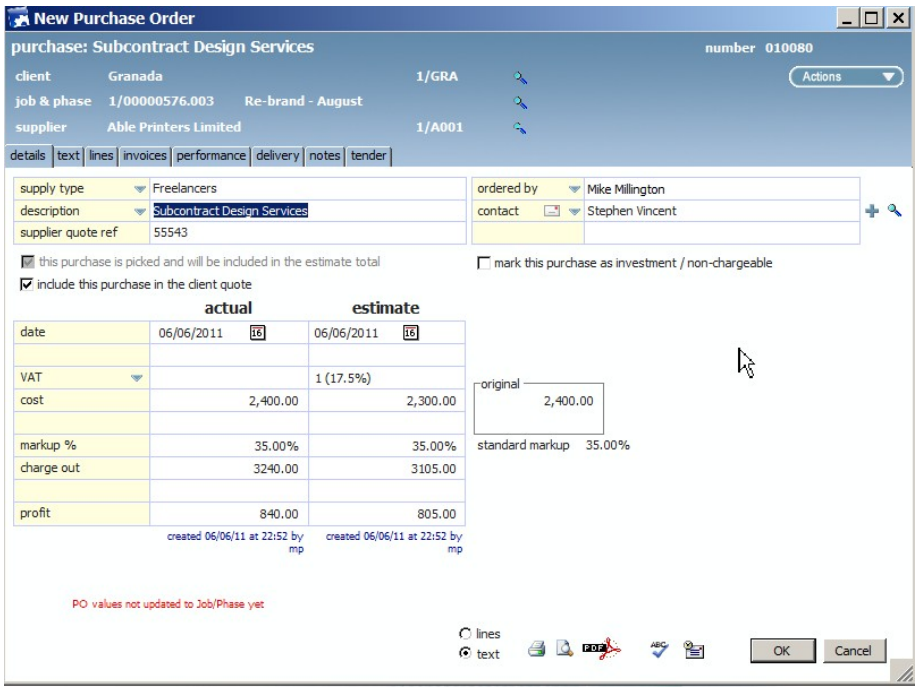
Client PO Management Reports

See below in reports section.

PURCHASES & EXPENSES

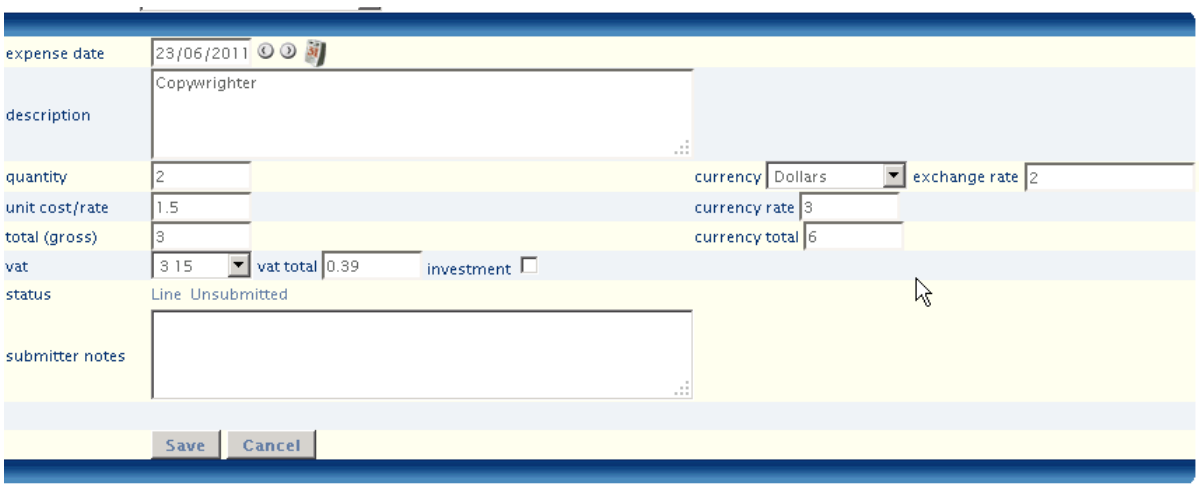
Purchase order user interface

The user interface for purchase orders/estimates has been improved.
The functionality is similar to before. However, the date and time that an estimate is converted to a true purchase order is displayed at the bottom of the “actual” and “estimate” columns.



Expense lines

You can now amend the currency exchange rate for an expense line. This will re-calculate the base currency values.

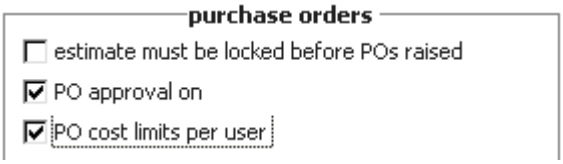


Purchase order approval

For those that use Purchase order approval, we now provide a separate approval limit in addition to creation limit on the user record.

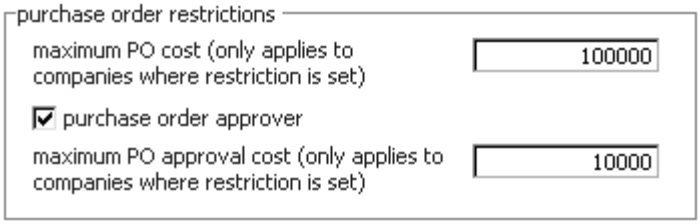
Company settings – switches tab

The PO approval setting - switches on the PO approval process
The PO cost limits - supports maximum PO cost values for both users and approvers



User table – access tab

Here you specify the maximum value PO a user can create and approve.



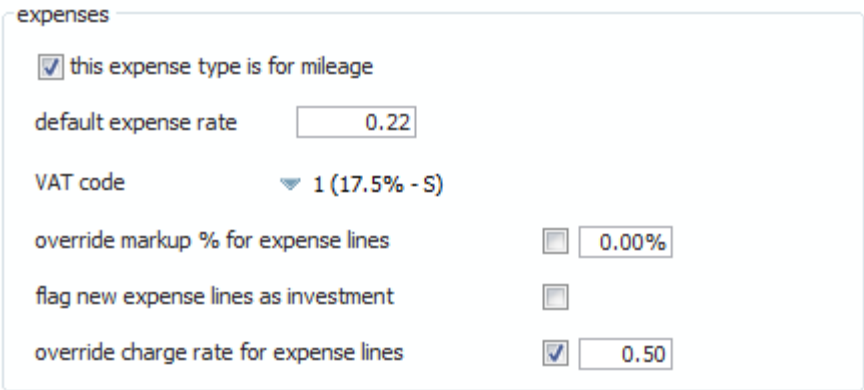
Approval box on a PO

Note:
Previously purchase order cost limits only applied to the creation of purchase orders (or conversion of purchase order estimates). With this new feature, users can now be set up to create (or convert) purchase orders according to one value and approve up to a different value. For instance, a user may be authorised to create (or convert an estimate) up to a value of £50,000. However, he or she may be restricted to approve up to a cost value of only £1000.

If this were the case he or she could create and approve POs up to £1000 and approve other users POs up to the same value. However, any purchase orders that are of a higher value would need approving by a user with a higher limit.

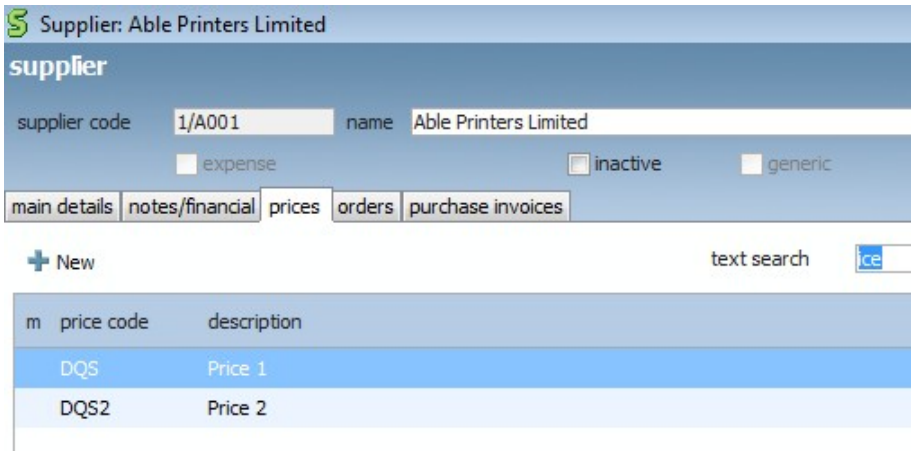
Supply types

New field for expense charge out rate and associated check box to activate. When an expense sheet is posted the charge out value is calculated as quantity * charge rate if appropriate.



Supplier prices

Improvements to the text search feature on supplier prices. Searching on part of an items name is now supported.

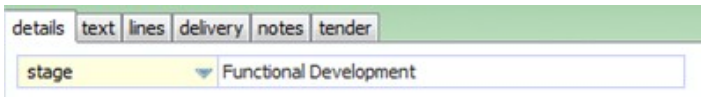


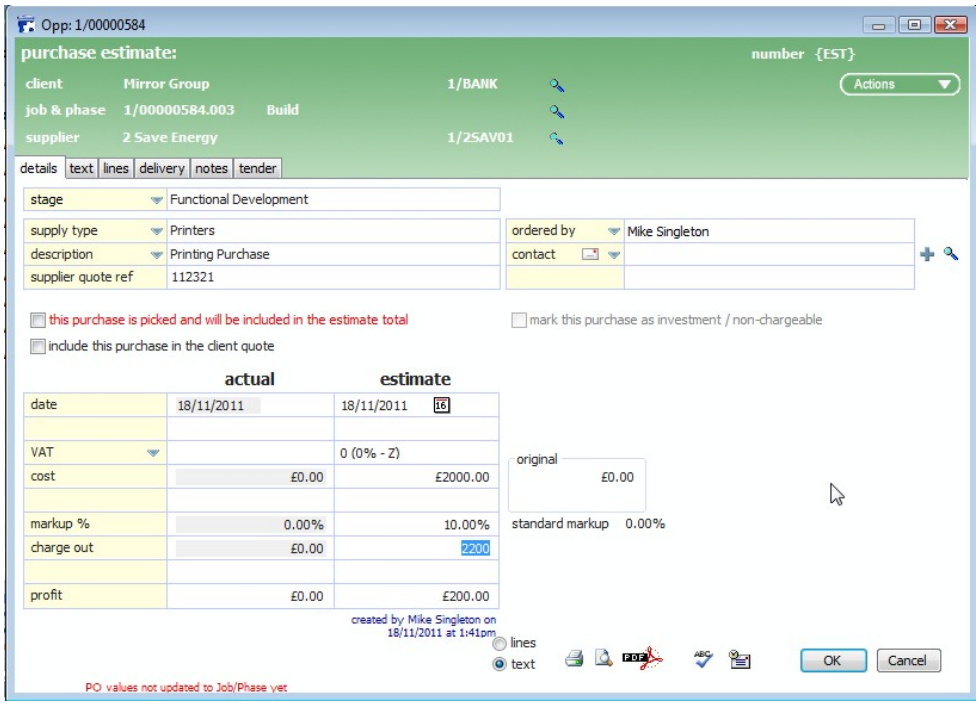
Purchasing on 2 tier jobs

2 tier jobs are jobs that have an extra level inserted between the phase and the estimate. This level is a schedule of stages. Each stage then has its own set of estimates. Previously you could only allocate staff time specifically to a stage of a phase. This has now been extended to purchase and expenses.

Creating a purchase order (estimate or real PO)

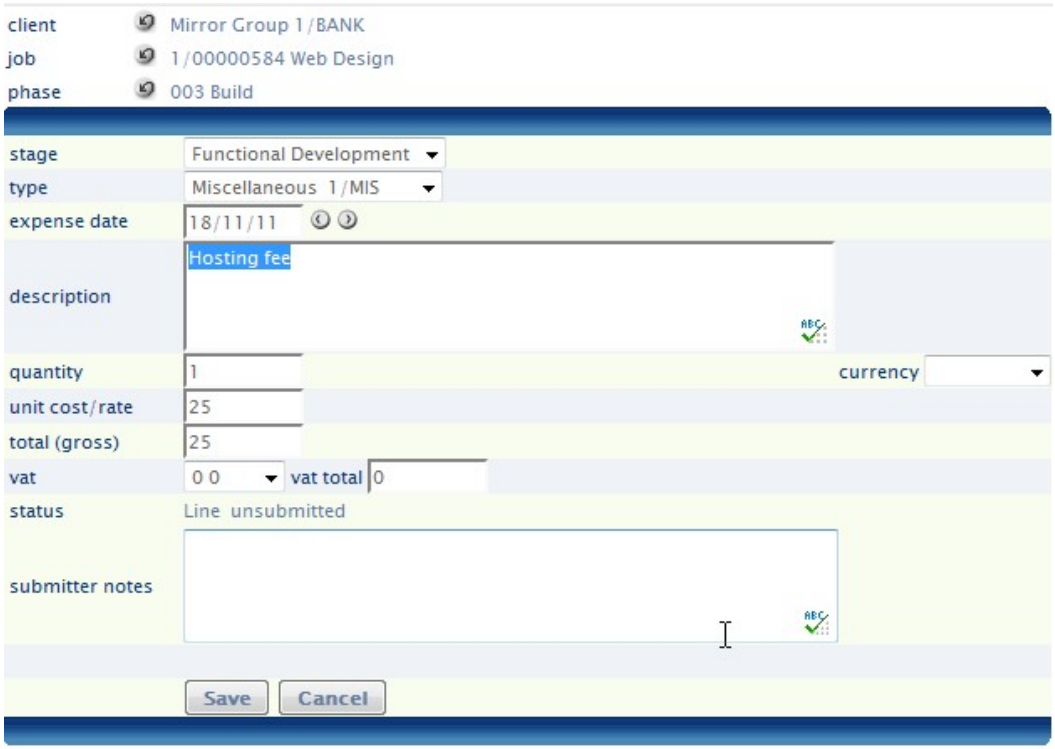
If the order is being posted to a 2 tier job you will be able to, optionally, allocate the PO to a specific stage.





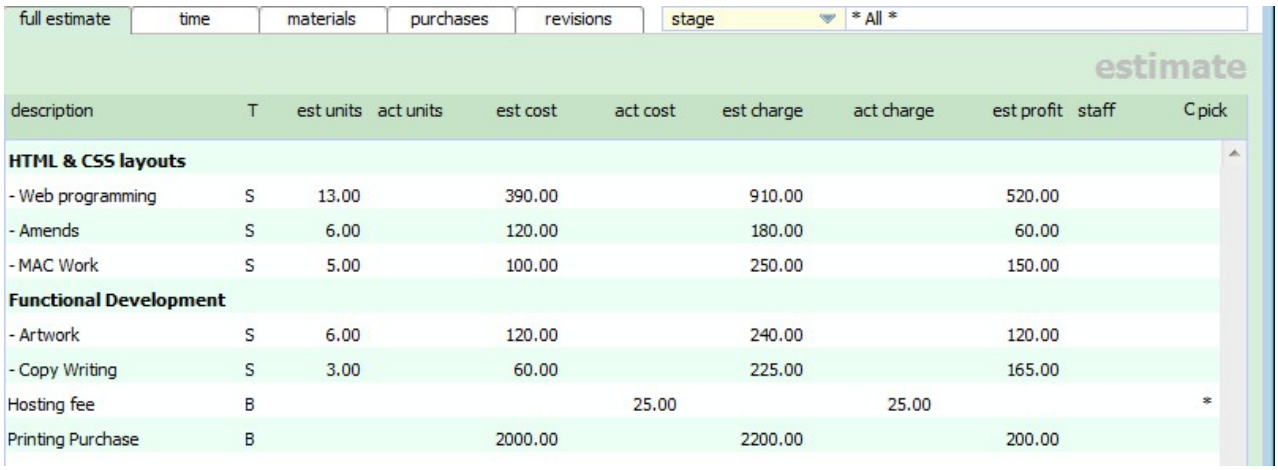
Creating an expense item

Similarly, if an expense is being posted to a 2 tier job you will be able to allocate the expense to a specific stage.



Estimate summary

When looking at the estimate you can now see the expenses and purchases under the required stage.

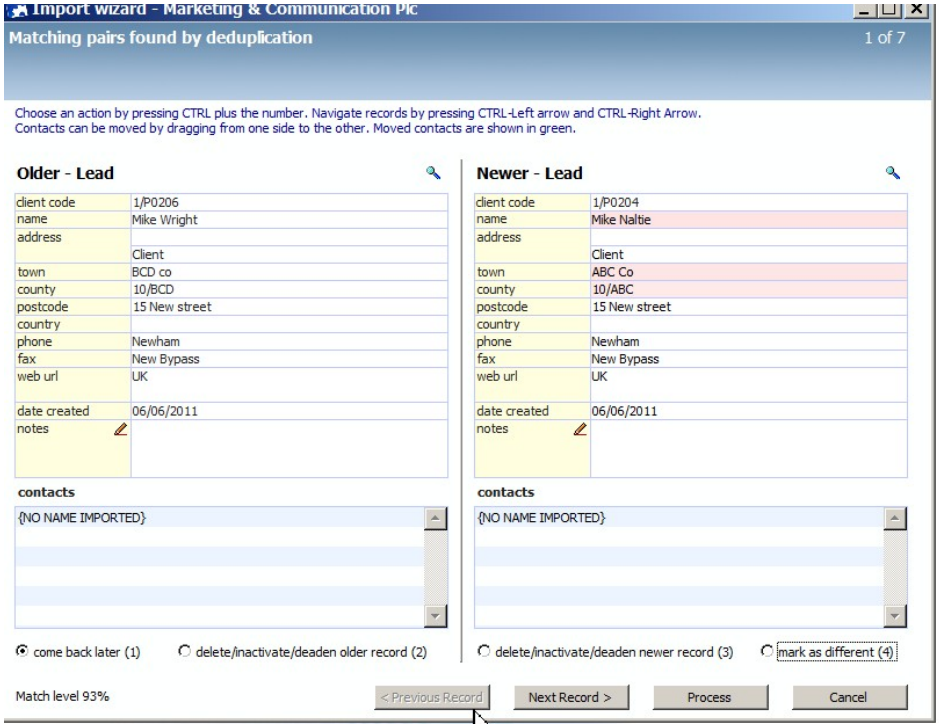


description	T	est units	act units	est cost	act cost	est charge	act charge	est profit	staff	C pick
HTML & CSS layouts										
- Web programming	S	13.00		390.00		910.00		520.00		
- Amends	S	6.00		120.00		180.00		60.00		
- MAC Work	S	5.00		100.00		250.00		150.00		
Functional Development										
- Artwork	S	6.00		120.00		240.00		120.00		
- Copy Writing	S	3.00		60.00		225.00		165.00		
Hosting fee	B				25.00		25.00			*
Printing Purchase	B			2000.00		2200.00		200.00		

SALES & MARKETING

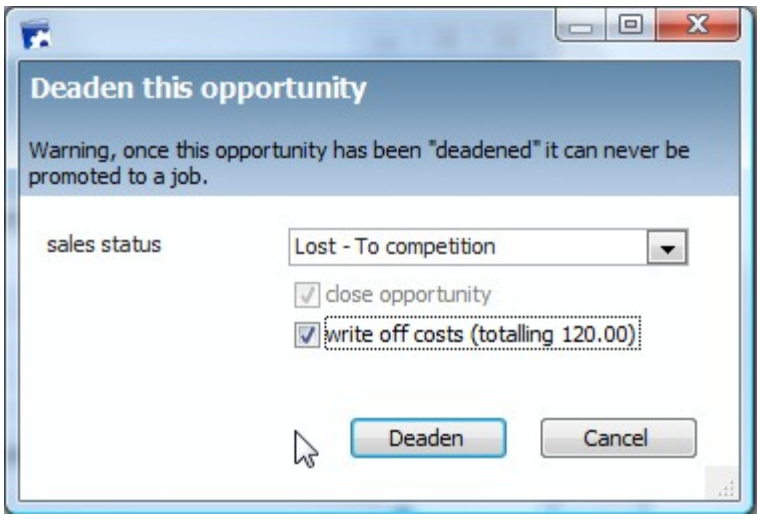
De-duplication

Options have been added to the de-duplication process to enable users to “deaden” previous records when newer versions are being imported. A “sales reason” can be selected when the wizard is first opened to be used when deadening leads / contacts



Deadening an opportunity

When deadening an opportunity you must first write off any costs that have been incurred. In this way these costs are correctly taken out of WIP. Previously that had to be done manually. Now you can simply click a checkbox when deadening the opportunity and the writing off of costs is done automatically.

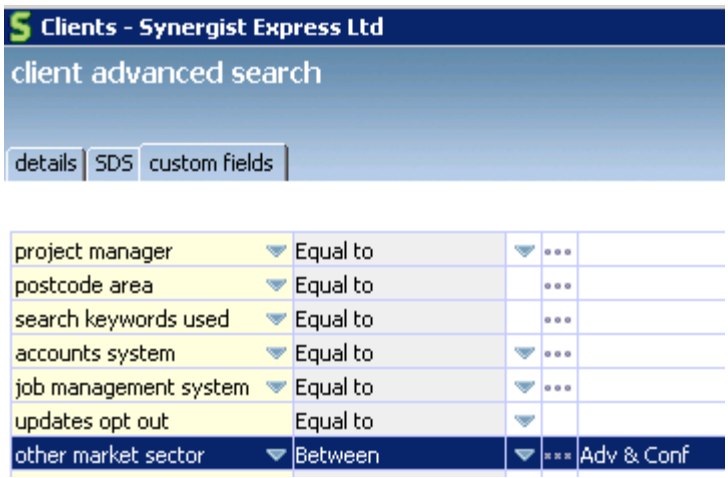


Mailshots

Mailshots can be ordered by changing the display order of the selected contacts.

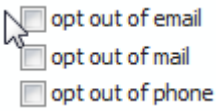
Custom fields – support the “between” operator

This is the case when searching using any type of custom field.



Clients & contacts

Option to opt out of phone calls - on client card and on the client contact record.



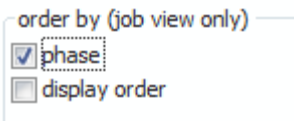
REPORTING

Estimate print-out enhancements

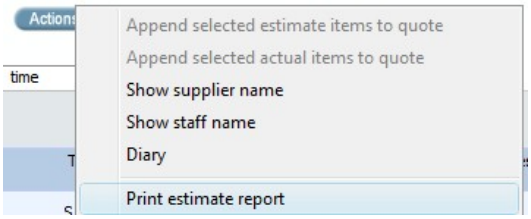
- When “ordered by phase”
  - Phase number displayed
  - Sub totalling supported
- Zeros removed (as per estimate screen)
- Report re-formatted

To print this report:

- From the job, select the estimate tab.
- Select a view that is ordered by phase, or manually set the order using the torch icon.



- Select the printout from the action menu



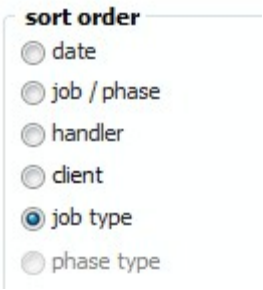
Example report:

Description
Brochure design B

Description	Type	Est Unit	Act Unit	Est Cost	Act Cost	Est Cha	Act Cha	Pick
001 Brochure design B - design & print								
New Business	S	3.00		30.00				
Artwork	S	4.00		80.00		160.00		
Design	S	4.00		60.00		240.00		
Printers	B	4.00		60.00	200.00	240.00	200.00	*
Phase Subtotals		11.00	0.00	170.00	200.00	400.00	200.00	
Totals		11.00	0.00	170.00	200.00	400.00	200.00	
				Est. Profit	230.00	58.00%		
				Gross Est. Profit	400.00	100.00%		

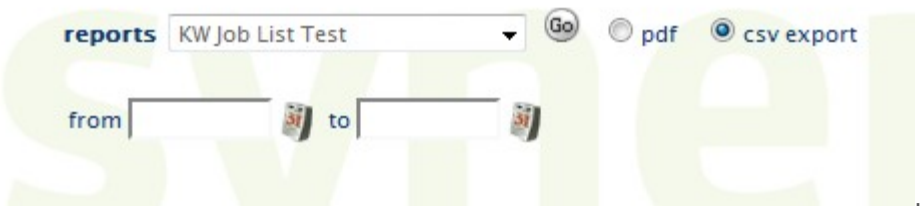
Job & phase type sort order

Job & phase type – phase level reports can now be sorted by job type.



Export to CSV of reports via web portal and scheduled reports

You can now choose to run a report from the Synergist web portal and download a CSV version. When setting up a scheduled report to be sent by email, you can opt to have the CSV version sent. These 2 functions will work with both standard report exports and also any custom reports which have been set as “web enabled”. As previously, before setting a custom report as web enabled, it is important to ensure that the report is compatible for processing by the server.



Managed POs reports

1. Managed client POs by order number

Managed client PO's by order number From 00/00/00 To 00/00/00

Client/Prospect	Job/Invoice	Description	Value	Date	Inv Value
5th Ford Motor Cars					
Order:	MJP 6		10,000.00	17/05/2011	
Job:	1.00008868	Test 2 tier timesheets	0.00	01/12/2010	
Job:	1.00008898	Test 2 tier timesheets	0.00	11/02/2011	
Job:	1.00008992	job 1 1000	1,000.00	12/11/2008	
		Balance/Invoiced	9,000.00		0.00
Order:	MJP 7		50.00	17/05/2011	
Job:	1.00008992	job 1 1000	1,050.00	12/11/2008	
		Balance/Invoiced	-1,000.00		0.00
Order:	MJP2		20,000.00	13/05/2011	
Job:	1.00008558	TEMPLATE 1	2,000.00	17/04/2009	
		Balance/Invoiced	18,000.00		0.00
Order:	MJP4		30,000.00	20/05/2011	
Job:	1.00008807	Test 2 tier timesheets qu	0.00	14/07/2010	
Job:	1.00008807	Test 2 tier timesheets qu	1.00	14/07/2010	
Job:	1.00008817	Test Phase Prefix quoted	2,000.00	13/09/2010	
Invoice:	88635			17/05/2011	1,000.00
		Balance/Invoiced	27,999.00		1,000.00
Order:	MJP8		100.00	17/05/2011	
Job:	1.00008992	job 1 1000	100.00	12/11/2008	
		Balance/Invoiced	0.00		0.00
Order:	MP10		50.00	18/05/2011	
Job:	1.00008992	job 1 1000	50.00	12/11/2008	
Invoice:	88636			18/05/2011	2,200.00
		Balance/Invoiced	0.00		2,200.00

2. Managed client POs by order number

Managed client PO's by job by Clients From 00/00/00 To 00/00/00

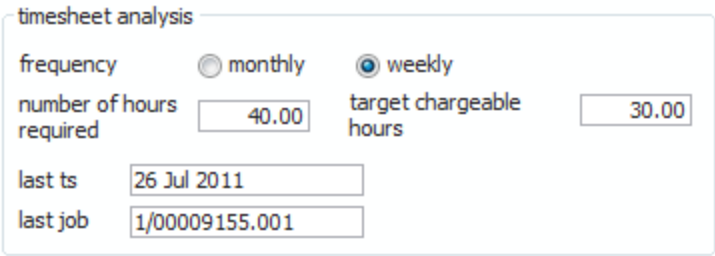
Client/Prospect	Job/Invoice	Description	Quoted/ Allocated	Date	Inv Value
5th Ford Motor Cars					
Job:	1.00008558	TEMPLATE 1	5,000.00	17/04/2009	
Client PO:	MJP1		1,000.00	13/05/2011	
Client PO:	MJP2		2,000.00	13/05/2011	
			2,000.00		5,000.00
Job:	1.00008619	Job header stages test	1,000.00	30/07/2009	
Client PO:	MJP1		0.00	13/05/2011	
			1,000.00		1,000.00
Job:	1.00008622	Synergist System	2,000.00	18/08/2009	
Client PO:	MJP1		1,000.00	13/05/2011	
			1,000.00		2,000.00
Job:	1.00008807	Test 2 tier timesheets qu	1,000.00	14/07/2010	
Client PO:	MJP4		0.00	20/05/2011	
Invoice:	88635			17/05/2011	1,000.00
Client PO:	MJP4		1.00	20/05/2011	
Invoice:	88635			17/05/2011	1,000.00
			999.00		-1,000.00

Data viewer

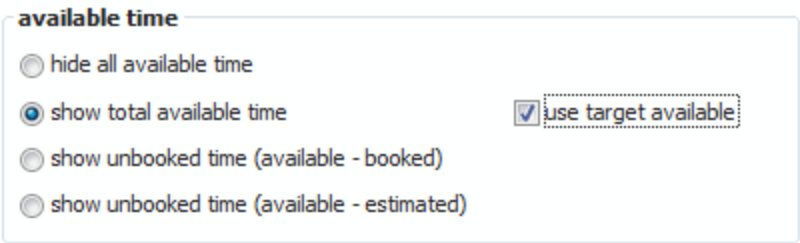
Data Viewer - Available time.

Option to use **Target Chargeable** instead of **total available** from a resource record. In addition it is now possible to cut data by Job status and Phase status.

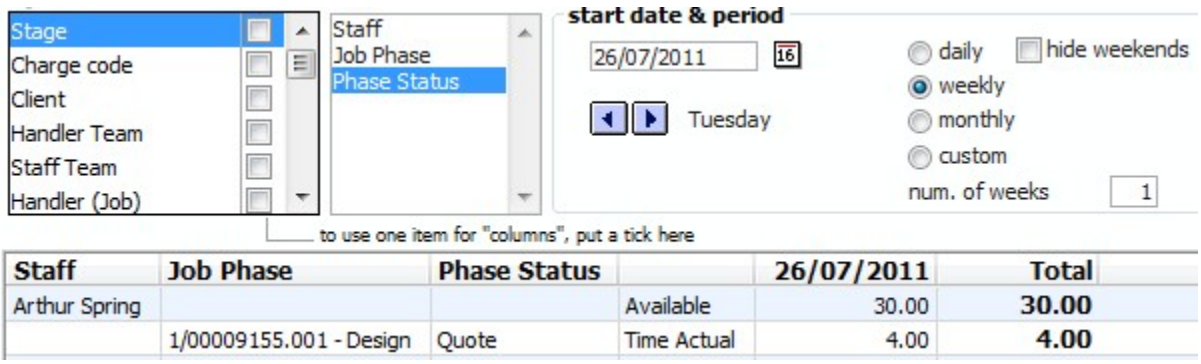
Staff resource record:



Available time selection in data viewer



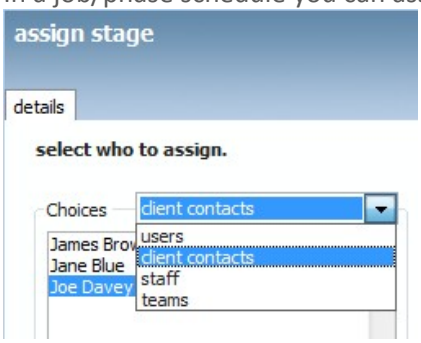
"Target chargeable available time" displayed in data viewer:



Gantt charts

People assigned to schedule stages now appear in Gantt charts. In addition, people assigned as a phase manager are shown against phase bars in Gantt charts. If you are viewing time estimate lines in a Gantt, the people assigned to those records will be shown.

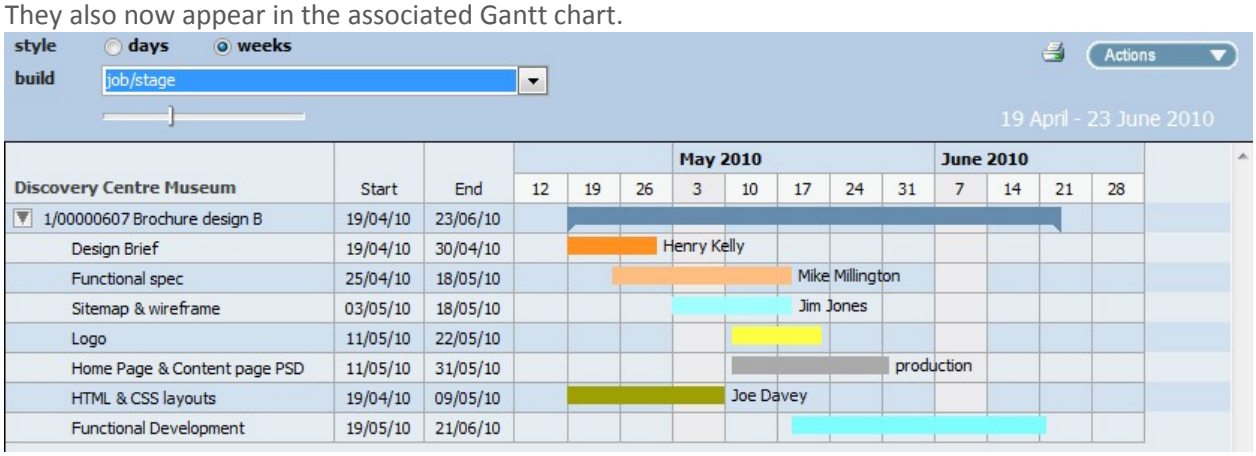
In a job/phase schedule you can assign a stage to a member of staff, teams or client contacts.



These are displayed in the right hand column of the schedule list.

key	seq	description	start date	end date	done date	comment	duration	assigned
	1	Design Brief	19/04/2010	30/04/2010			9	Henry Kelly
	2	Functional spec	25/04/2010	18/05/2010			17	Mike Millington
	3	Sitemap & wireframe	03/05/2010	18/05/2010			12	Jim Jones
	4	Logo	11/05/2010	22/05/2010			9	
	5	Home Page & Content page PSD	11/05/2010	31/05/2010			14	production
	6	HTML & CSS layouts	19/04/2010	09/05/2010			14	
	7	Functional Development	19/05/2010	21/06/2010			23	

They also now appear in the associated Gantt chart.



MEDIA

Unused media titles and adverts

The media titles and adverts list can grow untidy after the system has been used for a time. This can be due to various records being created for one-time or limited period use. A new facility has now been provided to mark unused records as inactive. Clicking on the Actions button on either the advert list or media title list will reveal this feature.

Update client PO reference

In certain circumstances, a client does not provide a PO number for their media inserts prior to them being entered onto Synergist Media. In this case it can be quite time consuming to open each insert to enter the client reference, prior to billing. To avoid this, when you enter a client reference in the schedule media record and there are already existing inserts, the system will ask if you wish to update the inserts with the new reference in one go.

Move headings and schedule media by drag-and-drop

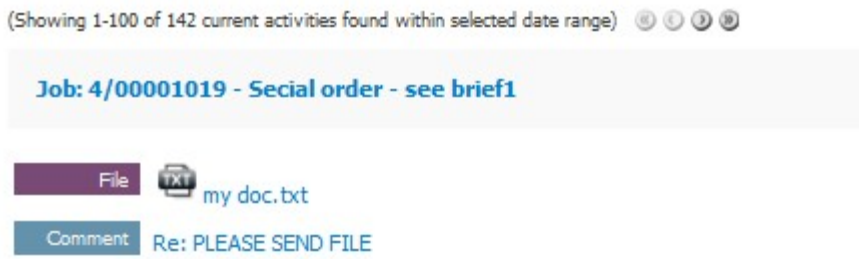
It is now possible to re-order both the headings and the schedule media which are located on the left-hand side of the schedule screen. You can simply use drag and drop to move them up or down the list. In addition, schedule media entries can be moved into a different heading within the schedule.

CLIENT PORTAL

Please refer to the separate release notes dedicated to the new client portal module.

Late enhancements:

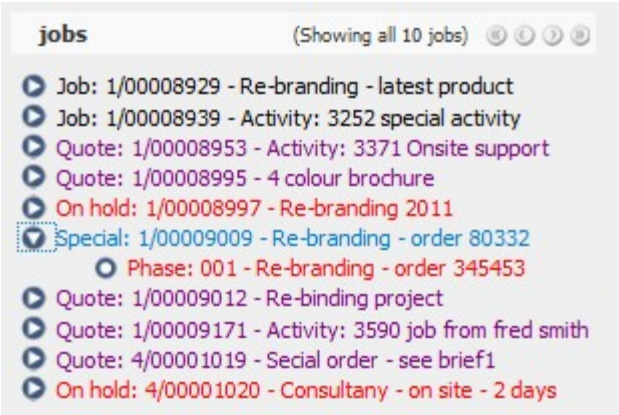
Paging added to dashboard activity list



Colour coding

The colour coding scheme for the portal has been modified:

Black – Live status jobs/phases
Purple – Quote status jobs/phases
Red – On hold status
Blue - Special status

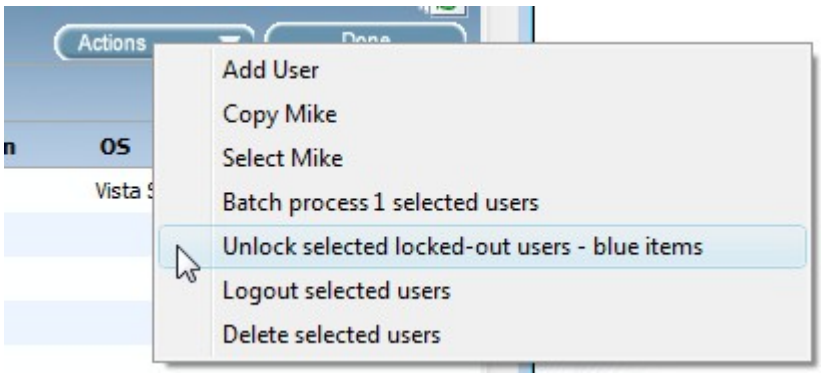


MISCELLANEOUS

Web lockout feature

Setting a lockout count greater than zero in system parameters will activate this feature. When you upgrade to Synergist 10.25, your system will be set to a default value of 10. This number represents the number of incorrect password entries by a web user that are allowed prior to their account being locked out. This has been implemented to prevent web passwords being overcome by using automated brute-force methods.

If a user gets locked out due to too many password violations the administrator can reset the account from the actions button on the user list. Users who have been locked out are displayed in blue.



Transfer costs and Move phase

The function to transfer costs from one phase/job to another has been improved. When you select this option from the phase “Actions” button, you will now be presented with a list of phases to choose from. Previously you had to type the destination phase number in.

In addition to transferring costs, it was also possible to transfer a whole phase. This function was previously only available in the Utilities section of Synergist. Like transfer costs, this is now available from within the phase record.

Currency cost rates

Currency cost rates have been provided for companies that have staff working in several different countries, and where fluctuations in exchange rates can cause problems in accurately costing jobs.

Example scenario

A problem may arise in this scenario...

A staff resource works for a company, but resides in a foreign country.
In Synergist the base currency for the company is sterling whereas the staff member is residing in the USA. This staff resource is paid in the local currency – in this example US Dollars.

Previously this was problematic when there were exchange rate fluctuations. The staff costs rates would be set up in sterling. Therefore movements in the exchange rates require cost rates associated with this member of staff to be regularly amended in order that costs recorded via timesheets represent the true cost of employing this member of staff. What's more, since there may be a large number of staff falling into this category it can be a time consuming task.

The solution to this problem is to enable a local currency to be associated with the member of staff. It is then possible to instruct Synergist to calculate the sterling cost of timesheets submitted by looking up the current exchange rate.

In order to make this procedure even easier to administer we have also provided "team level costing". This is similar to the "resource level costing" feature already supported, but at the team level. Admin staff are now able to set up teams with a "costing currency code" and specify cost rates in the selected currency for a set of charge codes. Once this has been done any staff resources who have been put in a team can optionally inherit the currency and cost rates specified in the team record.

Example - recoding costs against a job:

- Jim Smith – works for a company called "Projects UK"
- He works in the USA
- "Projects UK" is a UK company – costs are recorded in sterling

A team is set up "Team USA"

- The currency for this team is set to US Dollars
- The charge code "PM" (project management) is set up against this team as a team skill.
- "PM" is to be costed at $50 per hour for staff allocated to this team
- Jim Smith is put in the team "Team USA"

Posting time

- Jim enters a timesheet on job 1/0000123 for 1 hour project management
- This is then processed by Synergist and posted as a cost against job 1/0000123
    - The system sees that Jim is allocated to "Team USA" and so selects the cost rate and currency specified in the team record.
    - The system knows the timesheet is for $50 so this is converted at the point of posting by looking up the current exchange rate.
        - Cost in USD $50.00
        - Current exchange rate 0.63
        - Sterling value £31.50

- The timesheet is posted against the job as a staff cost of £31.50

Layout sign-off sheet

When implementing a new company, or if an organization is going through a re-branding exercise, it is not uncommon to require a new set of customised document layouts. As part of our quality control process we have provided a sign-off mechanism. Once you have tested your new layouts this document should be printed out/scanned and faxed/emailed to our support department. This provides our helpdesk with the necessary documentation to track changes made to document layouts. We are unable to guarantee timely support for document layouts unless we have an up-to-date sign-off document. The layouts should be signed off by a senior member of your staff.

Synergist document layout sign-off

Company Name: Birmingham

The following layouts have been used and tested successfully in Synergist:

Layout name	Type	Modified By	Date
2/**Invoice Backing Sheet	Invoice Backing Sh	4D Application	00/00/00
2/**Invoice Template	Invoice	4D Application	00/00/00
2/**Job Quote Template	Job Quote	4D Application	00/00/00
2/**Job Quote Template subtotals	Job Quote	4D Application	00/00/00
2/**Job Schedule Template	job schedule	4D Application	00/00/00
2/**Phase Quote Template	Phase Quote	4D Application	00/00/00
2/**Phase Schedule Template	x-container	Mike Millington	19/06/2011
2/**PO Lines Template	PO Lines	4D Application	00/00/00
2/**PO Text Template	PO text	4D Application	00/00/00
2/**Revenue	revenue managem	4D Application	00/00/00
2/**Revenue Manual Invoices	revenue managem	4D Application	00/00/00
2/**Tender Lines Template	Tender Lines	4D Application	00/00/00
2/**Tender Text Template	tender text	4D Application	00/00/00

Signed for Birmingham

Mike Singleton
Date: 21 June 2011

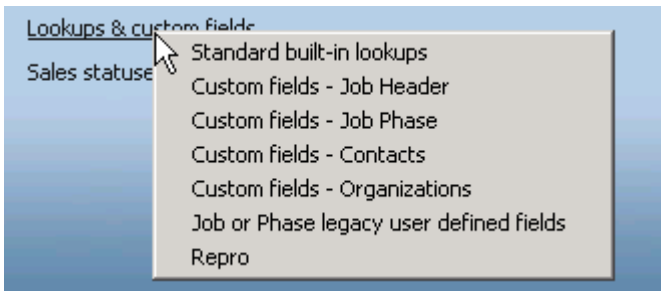
Lookups

Synergist has a validation tables that can be allocated to certain types of fields, including custom fields. In version 10.25 these have been given a more comprehensive feature set:

- Fully company specific
  Lookups properties can now be specific to a single company.

- Mandatory
  Fields can be set as “mandatory” in which case users are forced to select/enter a value when entering data.

The user interface has also been improved to make it easier to identify the different types of lookups. Within “file maintenance” there is an option called “Lookups & custom fields”. On clicking this link you will be offered a selection of different types of lookups:



Lookup types

- Standard built-in lookups
  These are mainly provided for the client and sales related fields

- Custom fields – Job header
  New feature – ability to create as many job custom fields as you require, of any type, with validation lookup lists

- Custom fields – Job phase
  New feature – ability to create as many phase custom fields as you require, of any type, with validation lookup lists

- Custom fields – Contacts
  Ability to create as many phase custom fields as you require, of any type, with validation lookup lists

- Custom fields – Organizations
  Ability to create as many phase custom fields as you require, of any type, with validation lookup lists

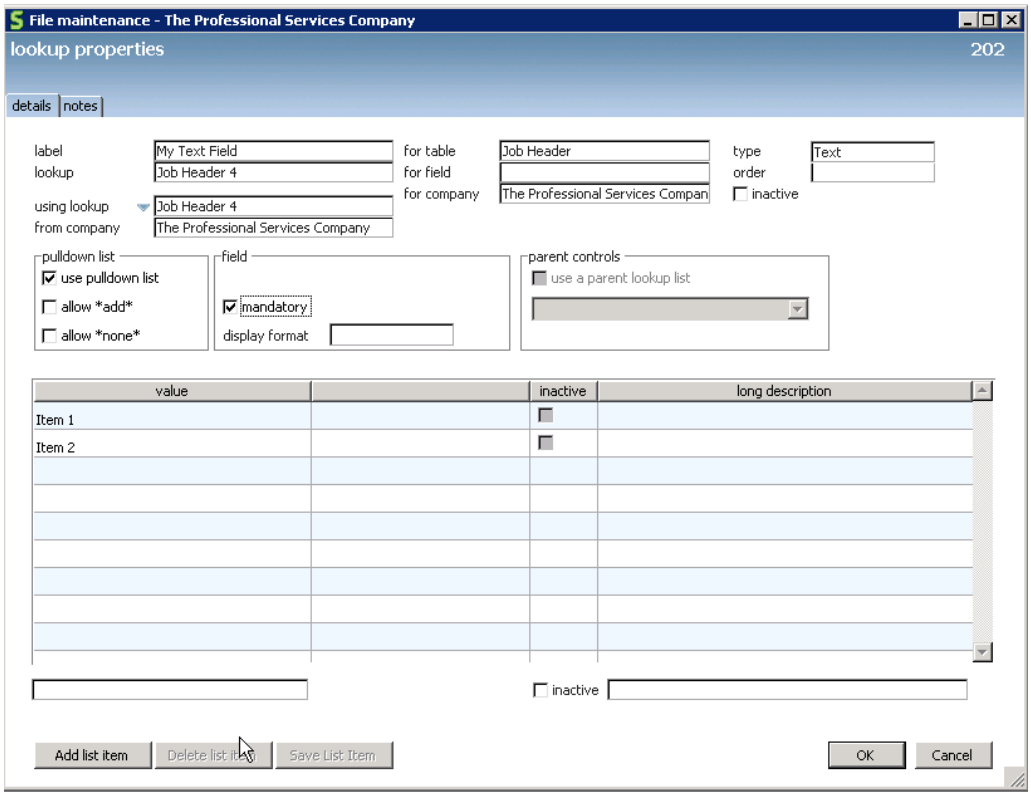
- Job or phase legacy user defined fields
  Old style Job and phase user defined fields

- Repro
  Lookup lists for the repro system (special module)

Example of a job header custom field

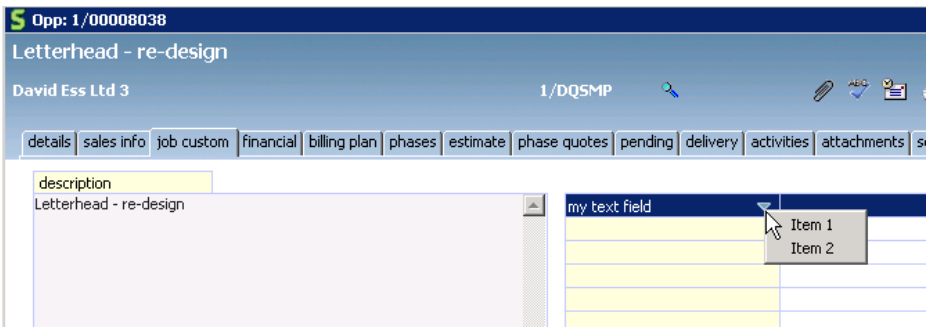
In this example the user has created a custom field for the job card.

- This field is associated witht the job header and will therefore appear on the job card and the job criteria screen (for doing searches / creating views)
- The label has been set to “My Text Field”. You can have any label you wish associated with this field.
- The field is a text field and has an associated list of valid values that can be selected from a drop down list



Example of custom field in use:

Here is an example of this custom field – displayed on the job card



Field Properties – general descriptions of what they represent:

All the lookups have similar properties (with minor exceptions)

- Label
  This is the on-screen label for a field

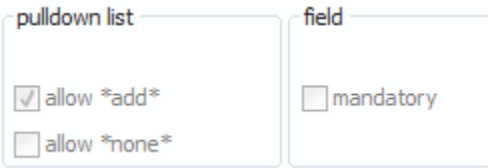
- Lookup
  Internal name of the associated lookup

- Using lookup
  You can optionally have this lookup use the lookup items of another lookup.
  This may occur if the lookup is sharing a list with another lookup. For instance The lookup "Lead rating" shares its item list with "Lead rating in opportunities mgr".

label	
lookup	Lead Rating
using lookup	Lead Rating Opportunities Mgr

  In this case you are not able to directly set some of the properties – to do this you must open the other lookup – in this case "Lead rating in opportunities mgr".

  Greyed out properties in "Lead rating" lookup screen.

  This may also occur if you are using the FM of a parent company. By default you will be using the lookup properties of the parent company. However, this can be overridden.

- From company
  If you are using the FM from a parent company the parent company name is displayed here
  In this case you will be using the propertes of the parent company's lookup properties. To access these properties (e.g. the "mandatory" flag) you will need to open this table from the other company's FM (File Maintenance)

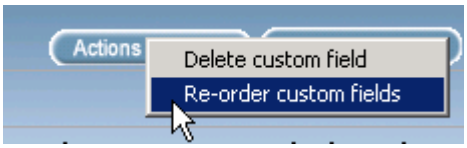
- For table
  Displays which table this field will appear in

- For field
  This will display the relevant field name associated with the lookup

- For company
  Which company this field will appear in

- Type
  Text, numeric, logical or date

- Order
  The order custom fields are displayed in
  To change the order use the actions button on the FM field list



A drag & drop interface is provided to easily re-order the fields

- Inactive
  Supress this field from input screens (only applies to Custom fields)

- Pulldown list group
  A list of valid values can be set up and will appear in a drop down list for dat input (see below)
  You can allow users to add new items to this list by checking the “add new” option

- Field group
  Option provided to enforce this field by making it mandatory

- Parent controls
  You can sub-divide the validation list so the user sees a different validation list depending on the value of another field (the parent field)

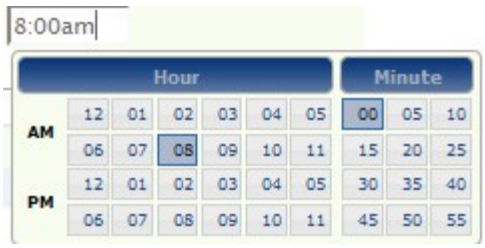
- Value list
  Validation list

Date picker

A new user-friendly date selecting control has been implemented in the staff portal.

Time picker

A new user-friendly time selecting control has been implemented in the staff portal. We have moved away from the previous 24hr clock format for time. Synergist now displays am/pm to the right of time values, and a time picker has been implemented in both the web portal and 4D client versions of the product.



Stages list – enhanced features

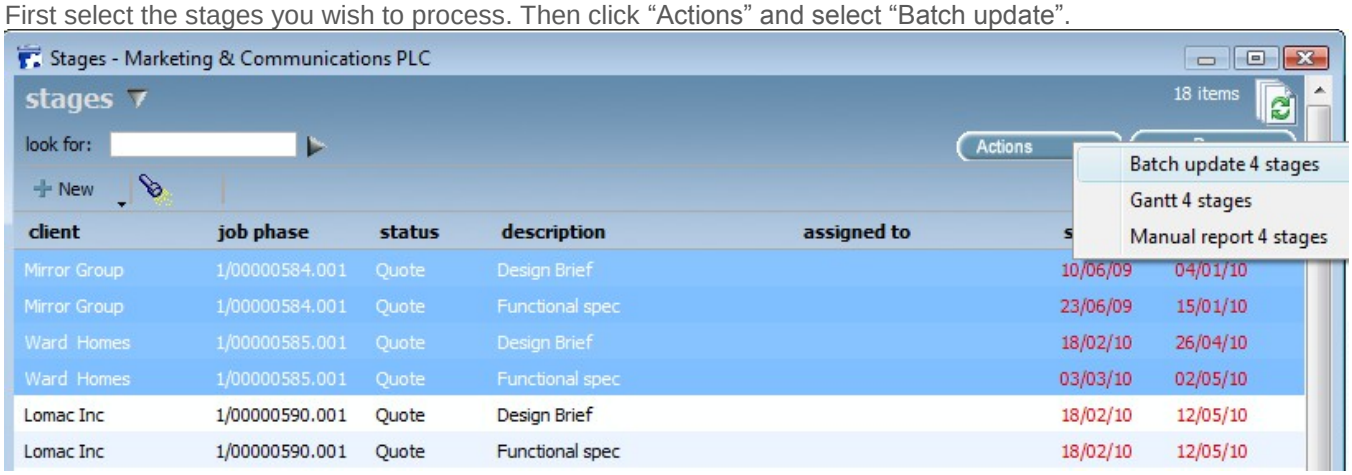
Synergist now supports the creation of time estimates for 2-tier jobs via the stages list. 2 tier jobs are jobs that have an extra level inserted between the phase and the estimate. This level is a schedule of stages. Each stage then has its own set of time estimates.

Access the stages list from the main menu

Filter

You can filter stages list so only 2 tier jobs are listed (use the torch icon, advanced tab). You can then make a selection of the stages you are interested in and create time estimates on these stages.

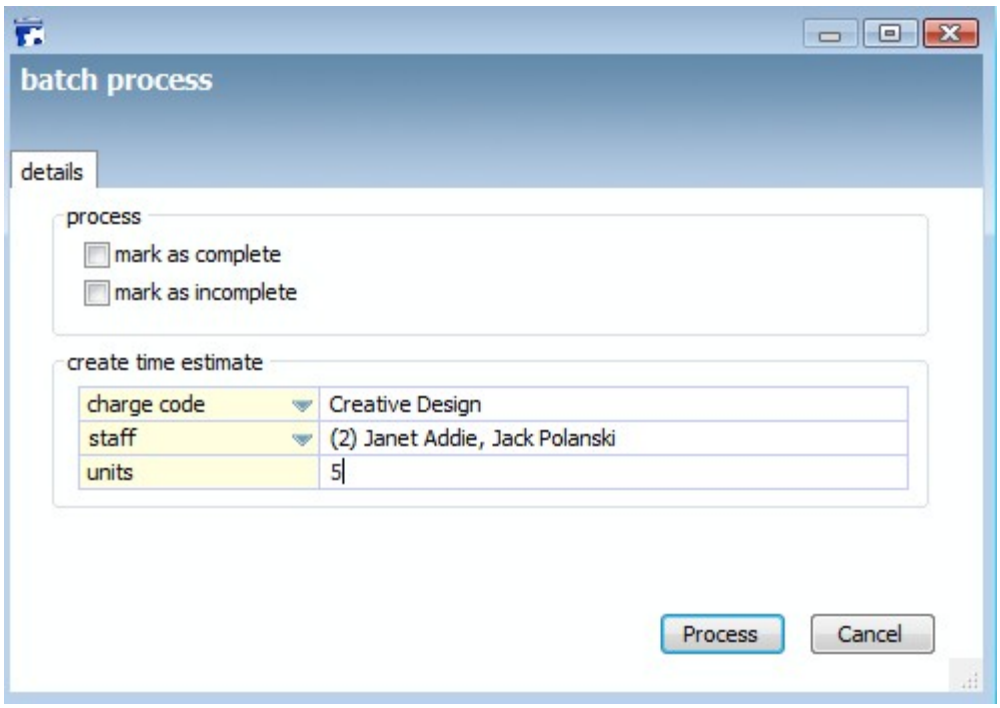
First select the stages you wish to process. Then click “Actions” and select “Batch update”.



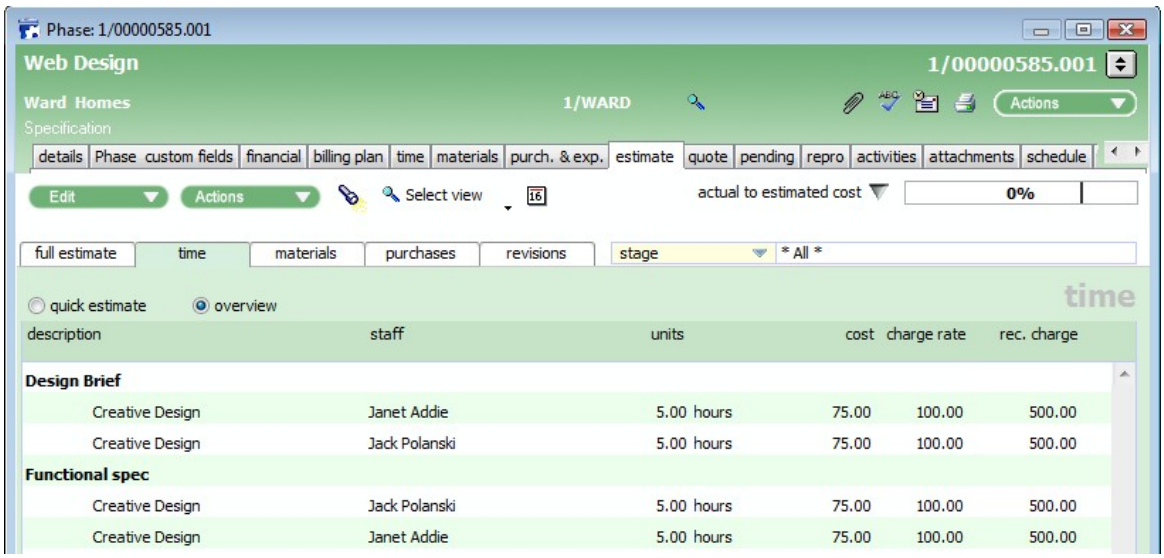
Batch update
Here the user has opted to create estimates of 5 hours of creative design, allocated to 2 members of staff, against each of the 4 selected stages.

Options:

- Select a charge code or leave blank if wanting to create for several staff members
- You do not have to allocate staff – it is optional
- Multiple staff members can be selected without specifying a charge code (staff default charge codes are then automatically used)



The result
In this example time estimates have been created on the selected stages for this phase.



Alerts

Over budget alert - option to use cost or **recommended charge** for over budget calculation.