



v10.7 Release Notes

Note: Synergist v10.7 requires 4D v13

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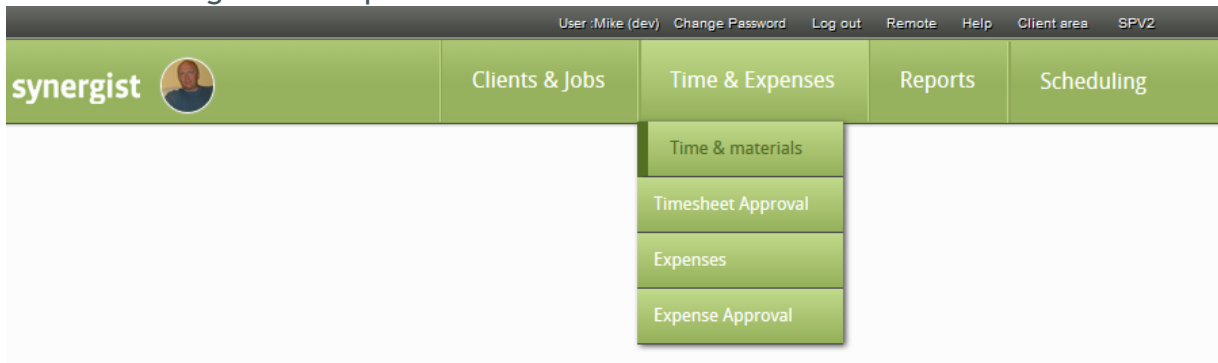
Staff Portal

User interface overhaul

The staff portal is the module most users employ to enter timesheets and expenses. It can also be used for viewing /creating & updating jobs etc. In Synergist v10.70 we have given the interface a fresh look and improved some key elements.

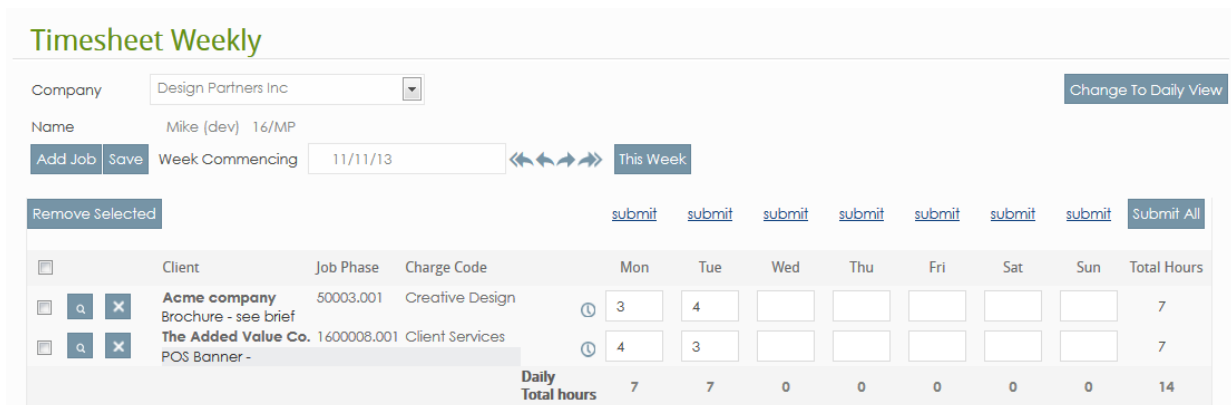
New menu

You will notice straight away that menus have changed. Time & Expenses are now all under a single menu option.



Timesheets

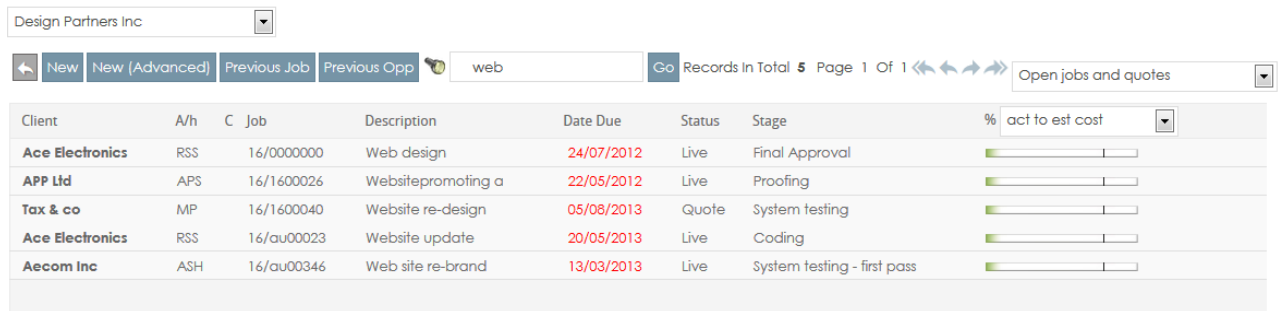
Time sheet entry screens are essentially the same, but the layout is clearer and easier to read.



Jobs

In this new design the job list opens immediately on clicking “jobs”. If you need to find a specific job just enter part of the job number or the client name etc.

Job List



Client	A/h	C	Job	Description	Date Due	Status	Stage	% act to est cost
Ace Electronics	RSS	16/0000000		Web design	24/07/2012	Live	Final Approval	<div style="width: 100%;"></div>
APP Ltd	APS	16/1600026		Websitepromoting a	22/05/2012	Live	Proofing	<div style="width: 100%;"></div>
Tax & co	MP	16/1600040		Website re-design	05/08/2013	Quote	System testing	<div style="width: 100%;"></div>
Ace Electronics	RSS	16/au00023		Website update	20/05/2013	Live	Coding	<div style="width: 100%;"></div>
Aecom Inc	ASH	16/au00346		Web site re-brand	13/03/2013	Live	System testing - first pass	<div style="width: 100%;"></div>

Reports

Web reports are now found under “Reports” on the main menu.

Reports

Select Company

Design Partners Inc

Reports

simple export
web report - missing timesheets

Customizing the Synergist Staff Portal

It is now possible to customize the design of the Employee Portal (e.g. fonts, colours etc.). You are also able to swap out the standard logos for your own logos. However, changing styles does involve modifying a .CSS file and placing new logos on your server, so some knowledge of CSS is required (a job suitable for a designer or a software developer). Our support desk can supply you with the CSS template required, but we are unable to advise you on actually modifying the file. For more details on this see the Synergist Knowledgebase.

Numbering jobs

Support added to the portal for “own job numbers”, “manual prefixes”, and re-numbering of opportunities.

Calendar

In the calendar hover text now displays the job/phase handler’s name on the screen so the person doing a task knows who to contact about the work.

Jobs

New thermometer

There are new thermometers that display “normal” time against estimated/baseline time.

Note: These new thermometers only appear for companies using overtime. Overtime is excluded (only “normal” time is used for the calculation)

(See company settings, “time sheets” tab to switch on overtime feature)

- “Normal to estimated hours”
- “Normal to baseline hours”

The screenshot shows a software interface with a table of jobs. The table has columns for job number, client, handler, description, and date due. A context menu is open over the table, listing various actions such as 'actual to estimated cost', 'actual to estimated chg', 'rec. chg to invoiced', 'rec. chg to quoted', 'estimated to quoted', 'invoiced to quoted', 'priority', 'completed %', 'weighting %', 'flowmation', 'time', 'actual to estimated hours', 'normal to estimated hours', 'actual to estimated cost', and 'actual to estimated chg'. The 'normal to estimated hours' option is highlighted in blue.

job number	client	handler	description	date due	
16/000000	Ace Electronics	R55	Web design	24/07/2012	Tue
16/0016040	Tax & co	MP	Display design	05/08/2013	Mon
16/0050003	Acme company	AP5	Brochure - see brief	26/09/2013	Thu
16/0050008	3DReid	ASH	Business cards	30/12/2013	Mon
16/1600004	Ace Electronics	JQ	Graphics for New Hunt	22/05/2012	Tue
16/1600021	Tax & co	MP	Wbsite overhaul	11/05/2012	Fri
16/1600022	T1 Xpress	R55	4 Colour brochure	21/08/2013	Wed
16/1600024	Wakefield MDC	AP5	Re-branding project	30/03/2012	Fri
16/1600025	Acme company	AP5	ITV Ad - concept	22/05/2012	Tue
16/1600026	APP Ltd	AP5	Websitepromoting a	22/05/2012	Tue

Batch update

The phase batch update feature can now update the Phase Owner field.

“View phases” option on opportunities list

The opportunities list now supports radio buttons for switching the view between jobs/opps and their related phases. This is a similar feature to the jobs/phases radio button that appears on the job and phase lists.

The screenshot shows a software interface with a table. At the top, there are two radio buttons: 'Jobs' (selected) and 'Phases'. Below the radio buttons, there is a table with columns for 'quote' and 'grs mrg'. The table contains three rows of data, with the first two rows showing '0.00' for both columns and the third row showing '0.00' for both columns.

quote	grs mrg
0.00	0.00
0.00	0.00
0.00	0.00

Inter-company purchasing

The rules for inter-company purchasing have been tightened up to include PO approval.

Block costs by phase type

It is now possible to set up phase types so they are designed to allow only certain specified estimates & costs. Any job phases that are allocated to this phase type will then be restricted to certain cost types. This feature is switched on in company parameters “forced/blocked” tab.

block costs			
by phase status and type			
	time & materials	purchases	expenses
quote	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
live	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
on hold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
in house	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
special	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
phase type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Phase type

In this example phase type “Expenses” is now set to block all costs apart from expenses.

File maintenance - Design Partners Inc

phase types

details | advanced

code: 16/EXP inactive

description: Expenses

order:

purchase/expense nominal: - cost of sales

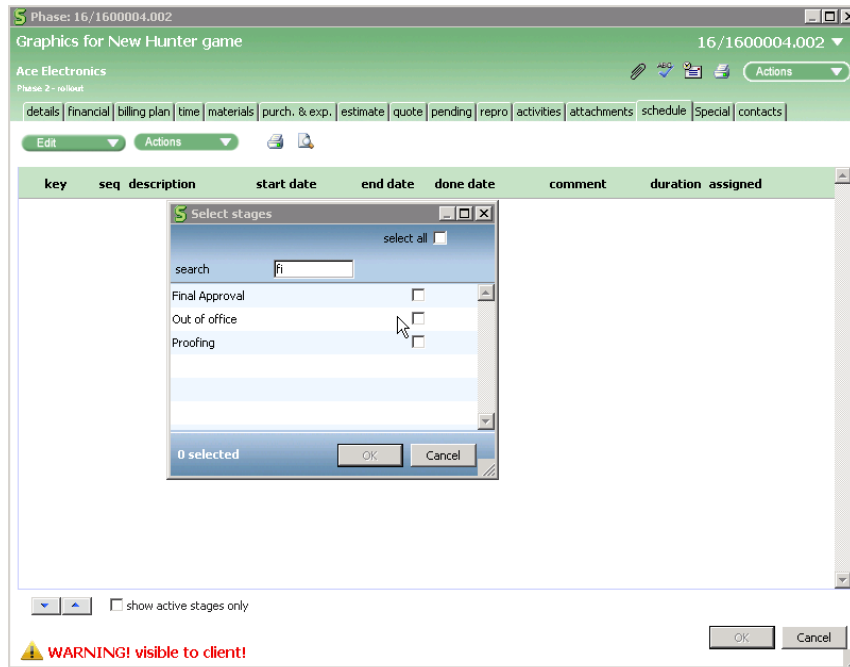
block costs (if company setting enabled)

time & materials	purchases	expenses
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Search feature

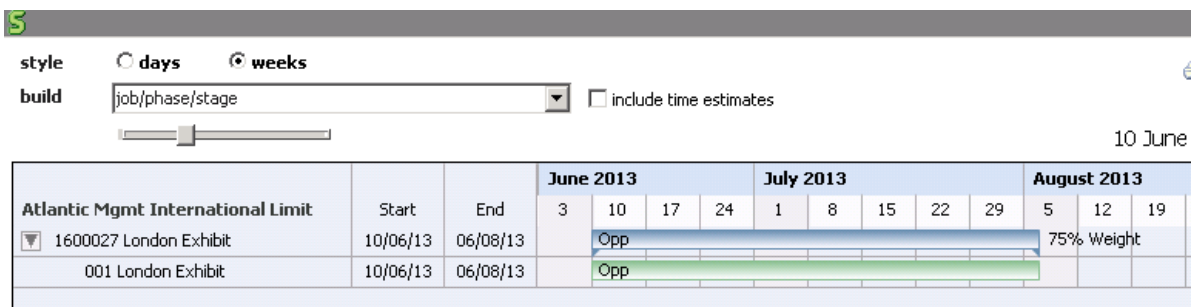
Job/Phase stages

A search feature added to the “select stages” option on the schedule tab of jobs and phases. This makes it easier to build a schedule if you have a large number of stage types set up on your system.



Gantt charts

An indicator has been added to Gantt charts for jobs that are still opportunities. If a job is an opportunity the weighting % is also shown (if % is greater than zero)



Work allocation calendar

Filtering the view

If you wish to see a subset of the work allocated in the calendar you can now apply a filter. You can filter the view by client, job, or job phase.

To apply a filter click on a job already booked in the calendar. A contextual menu will appear. From this menu you can filter the calendar. In this example we will select to filter the calendar by the client “Ace Electronics”

The screenshot shows the 'Calendar bookings - Design Partners Inc' interface. At the top, there are controls for 'style' (set to 'weekly'), 'daily', and a date range 'from 11/11/2013'. Below this is a 'column width' slider. The main area is a calendar grid for weeks 46 and 47 of 2013, with columns for days of the week (Mo-Fr). The calendar is organized by location: California, New York, Pakistan, and Studio. Each location has a list of jobs with their respective allocations. A filter menu is open over the job 'Ace Electronics - 1600032.001 TV Campaign' in the Studio section. The menu options are: 'Filter to...', 'Client Ace Electronics', 'Job 1600032', 'Phase 1600032.001', and 'Reset filter'. Below the calendar is a 'look for' search bar and a table of job details.

Client	job phase	status	team	handler	due d
Ace Electronics	16/1600032.002	Live	Account Man.,Adminis	RSS	Sa 31/
Ace Electronics	16/1600032.001	Live	California,Studio	RSS	Tu 01/
SnakeByte Software	16/A050003.001	Live	California,New York	DFH	Fr 29/
SnakeByte Software	16/A050003.001	Live	California	DFH	Fr 29/
SnakeByte Software	16/A050003.001	Live	Account Man., Califor	DFH	Fr 29/

The result

As you can see - only jobs for the selected client are now displayed in the view. In addition to the calendar being filtered, the job selection list below is also filtered

S Calendar bookings - Design Partners Inc

style weekly daily from 11/11/2013 16 ← →

column width

	11/11/13 - Week 46							18/11/13 - Week 47						
	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
California														
▼ Rob Shearer PST - Copy Writing														
Ace Electronics - 1600004.004 Graphics for														
New York														
Ginger Rogers mon(5) EST - Client Services														
Pakistan														
▼ Jan Green ZP5 - Design														
Ace Electronics - 1600032.002 TV Campaig														
Studio														
▼ Arthur Spring GMT - R&R														
Ace Electronics - 1600032.001 TV Campaig														
Mike (dev) GMT														

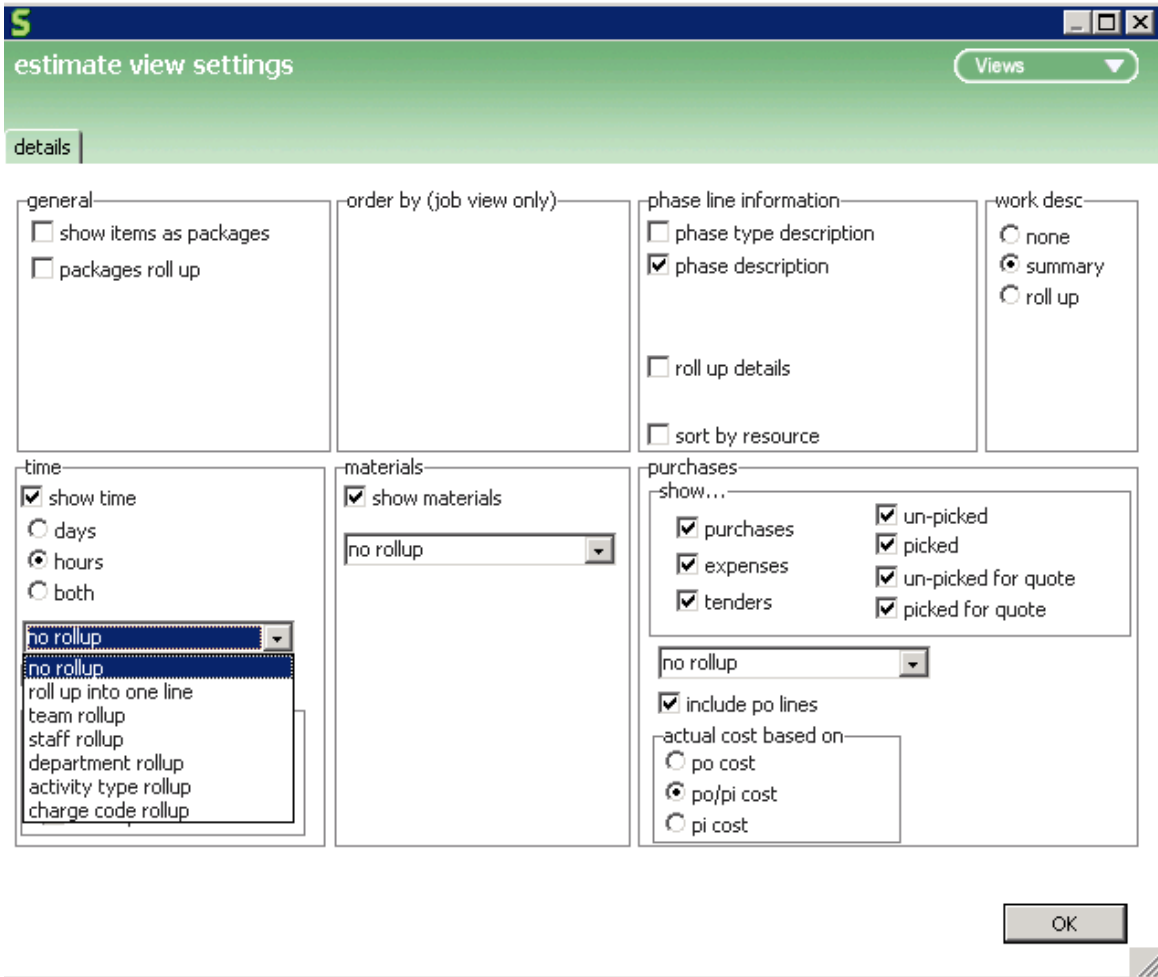
look for ▶ find matching items Calendar data has to 1 client
 filter the selection

	Client	job phase	status	team	handler	due date
	Ace Electronics	16/1600032.002	Live	Account Man.,Adminis	RSS	Sa 31/03/201
	Ace Electronics	16/1600032.001	Live	California,Studio	RSS	Tu 01/05/201
	Ace Electronics	16/1600004.004	Live	California	JQ	Tu 22/05/201

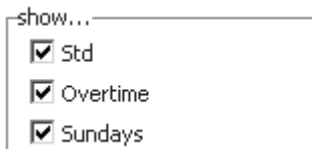
Quoting & Estimating

Estimate view settings (torch) screen

This screen has had some minor improvements - drop down lists now replace the old radio buttons.



Actuals can now be filtered by overtime.



Purchasing

Nominal builder override

The nominal builder (company settings) is typically used to automate the creation of a nominal breakdown of sales and purchase invoices prior to exporting to a linked accounts system.

There may be occasions when a special nominal code structure is required for purchase invoices for certain suppliers (typically “in house” suppliers).

We therefore now support a “nominal builder override”.

This option only appears after entering codes in a supplier’s nominal builder code fields.

nominal builder code/fragment	(external) 1001
	(internal) 2001
builder override	<input checked="" type="checkbox"/>

portal password	*****
flowmation user	not linked
facebook	
twitter	
linkedin	



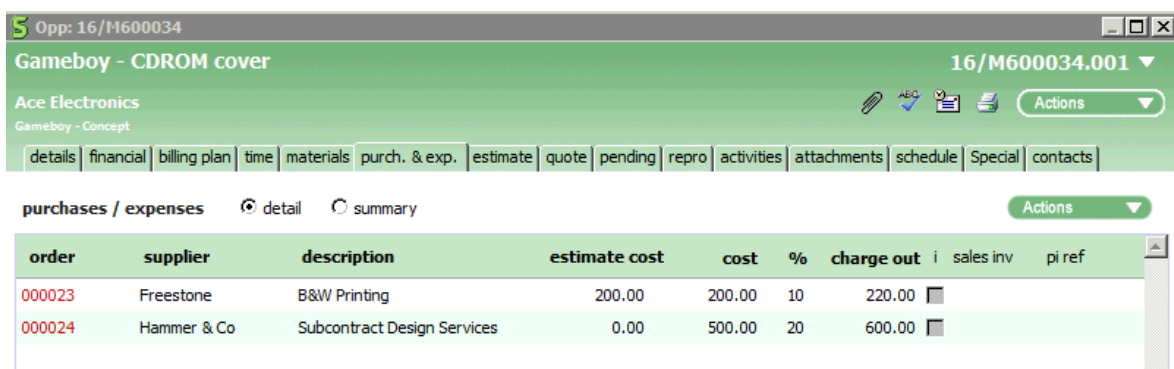
Once this has been done any purchase invoices exported for this supplier will use the nominal code entered here.

Purchase write-offs

We have now relaxed the restriction on “cancel & write off” of POs such that the purchase order does not have to be first be zeroised. The purchase order can retain its value and a zero value purchase invoice (write off) is allocated to the PO. The system will correctly report this as a zero value purchase using the POPI method of calculating purchase costs.

Sorting

The purchase order table on a phase can now be sorted by clicking on its column headings.



The screenshot shows a software window titled "Gameboy - CDROM cover" with a sub-header "Ace Electronics". The window displays a table of purchases/expenses. The table has columns for order, supplier, description, estimate cost, cost, %, charge out, sales inv, and pi ref. Two rows are visible: one for order 000023 from Freestone for B&W Printing, and another for order 000024 from Hammer & Co for Subcontract Design Services.

order	supplier	description	estimate cost	cost	%	charge out	i sales inv	pi ref
000023	Freestone	B&W Printing	200.00	200.00	10	220.00	<input type="checkbox"/>	
000024	Hammer & Co	Subcontract Design Services	0.00	500.00	20	600.00	<input type="checkbox"/>	

Purchase order list

“Total value” added to the bottom of the purchase order list.

purchase orders - The Professional Services Company

80 items

look for:

Actions Done

+ New

Detail Lines

order	real date	by	description	type	supplier	phase	their ref	actual cost
011442	23/04/12	LM	Flights to NZ x 100	Hotel Expenses	AAA Expense	1/000003D2.001		£120,000.00
011174	11/05/09	MP	Subcontract Design Services	Accounts Payal	AAA Expense	1/00001154.002		£5,000.00
011708	29/01/14	jg	Subcontract Design Services	Accounts Payal	AAA Expense	1/00001154.020		£5,000.00
011175	11/05/09	MP		Accounts Payal	AAA Expense	1/000008092.000		£1,000.00
							total value	£137,390.50

colour key: invoice not received expense part invoiced pending estimate

client: ABC Ltd
 job: Global Company Description
 phase: Global Company Description

supplier: AAA Expense
 sales inv

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Builder options

Note: These features were included in earlier versions of Synergist, but without release notes

Analysis by “Cost”

- This feature affects header analysis only, and when not “tied to invoice line allocation”
- The builder can now be used by companies using header analysis. A category "cost type" has been provided. If selected, when building the analysis breakdown of an invoice, the system will inspect estimates related to the invoice, and create a nominal breakdown of the invoice based on nominal fragments defined charge code / material / supply type tables.
- In other words - the invoice’s nominal breakdown will be based on estimates

nominal codes

default separator

sales	<input type="text"/>	Costs	<input type="checkbox"/>	Non
purchase	<input type="text"/>	Phase/SupplyType	<input type="checkbox"/>	Non
expense	<input type="text"/>	Phase/SupplyType	<input type="checkbox"/>	Non

sales header nominal analysis

- tied to invoice line allocation
- use proportional calculation for auto-analysis
- nominal analysis force on draft

Analysis by Phase type

Allow phase type to be selected as an element in the builder

- Previously “Phase type” was only available if header analysis had been selected and tied to ILA ticked.
- Now if sales invoice analysis is set to be generated for each invoice line (non-header analysis) invoices can have their nominal codes taken from the phase types of the phases invoiced. This works for all builds (except “none” and “manual”)

nominal codes

default separator

sales	<input type="text"/>	Phase Type	<input type="checkbox"/>	+
purchase	<input type="text"/>	SupplyType	<input type="checkbox"/>	
expense	<input type="text"/>	SupplyType	<input type="checkbox"/>	

sales header nominal analysis

- tied to invoice line allocation
- use proportional calculation for auto-analysis
- nominal analysis force on draft

Client link

There is now a link for opening up the client card on the invoice input form. Links also added for “bill-to” client and “deliver to” as well.

Invoice auto-detail invoicing

Invoice auto-detail invoicing - option added to roll-up time by team.

Invoice approval alerts

A new option has been added to invoice approval alerts “Client handler only”. If this checkbox is checked alerts go to the default handler of the invoice’s client. Otherwise alerts go to all handlers who are set up as invoice approvers.

Alerts tab on company settings

alert PO creator on PO approval alerts during invoice approval process suppress confirmations client handler only

Note: the system will fall back to the current “alert all approvers” functionality if any of these situations is true:

- There is no default handler
- The default handler is “out of office”

Invoicing rule

If a user attempts to create a new invoice on a job/phase that has already been invoiced, and if the invoice date is prior to the date of the original final invoice date, the system will force the new invoice to be a part invoice.

Billing plans

Billing Plan relative date option - “job start date”.

Previously there was only a combined option (Start date/expected close date). Adding a new option allows just the “start date” to be used.

Activities

Batch update

The user interface for the batch update has been improved for ease of use. You can now batch update the due date and time of a selection of activities. Also, secondary owner's selection / de-selection supported.

Note: The date & time only changes if you select a new date and time. 12:00 AM indicates 'no change'

change due date	00/00/00	16
change due time	12:00 AM	

New date and time selected...

Activities - Design Partners Inc

batch process activities

details

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

process

mark as complete mark as incomplete

change

change activity type ▼

change owner ▼

add secondary ▼

remove secondary ▼

change due date 25/08/2013 16

change due time 3:30 PM ▼

refile against

client ▼ SYNDEV client

contact ▼

job ▼

phase ▼

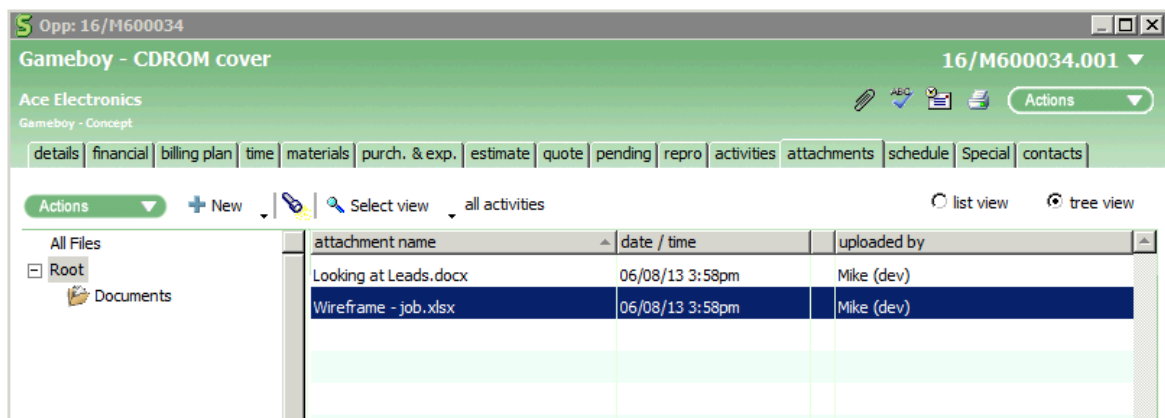
Process Cancel

Attachments

Sorting

The following attachment lists can now be sorted by clicking on its column headings.

- Attachments list (from the main menus)
- Activities - attachment tab
- Client - attachments tab
- Client contact - attachments tab



Performance Improvements

We have improved the performance when listing attachments.

- Separate views for attachments
- Unset the "search attachments" option in activity system views
- Removal of Phonetic keys for activities

Time & Expenses

Weekly timesheets

Un-posted time

If you have forgotten to post time from previous weeks, and it is just sitting there as pending timesheets, you will now see a button “Submit all previous”. Clicking this button will submit / post the timesheets from previous periods (but not this weeks or future dated timesheets)

Submit All Previous (3)	submit	submit	submit	submit	submit	submit	submit	Submit All
	Mon 18	Tue 19	Wed 20	Thu 21	Fri 22	Sat 23	Sun 24	Total Hours
	4		3					

Timesheet approval Alerts

The timesheet submitter is now alerted when an entry is queried or rejected.

Expenses

Attaching Receipts

Receipts can now be attached to expense lines. This is available for users who enter expenses via the desktop version of Synergist or the browser interface.

expense line Unsubmitted 584-1

expense: Mike (dev)

sheet no.: 584 Expense sheet - October unsubmitted

line created: 28/10/2013 11:56

details

client: Ace Electronics

job: 16/1600004 Graphics for New Hunter game

job and phase: 16/1600004.003

phase: Graphics for New Hunter game

expense type: Mileage

date: 28/10/2013 16

description: Mileage

receipt: Receipt_3340.jpg

approval notes: query/reject reason

Receipts can also be accessed from purchase expense records posted to jobs.

expense: Mileage

client Ace Electronics

job & phase 16/1600004.003 - Graphics for New Hunter game

expense Mike (dev)

details | text | lines | invoices | delivery | notes | expense

sheet no. 584 line created 28/10/2013 11:56

expense date 28/10/2013

quantity 20

unit cost / rate 0.22

receipt: Receipt_3340.jpg

Invalid data input

We have made this more user friendly, with a message appearing if numbers are entered incorrectly.

If a user enters “1 min”

1 min

The system flags that this is invalid.

Invalid

Note that hours entered for timesheets are entered as decimals, with a system setting defining the maximum value per day / timesheet.

Time sheet list

We have added job and phase filtering to time sheet/time estimate/time pending lists and mat sheet/mat estimate/mat pending lists.

Time sheet list - The Professional Services Company

advanced time search

basic | client | advanced

text search
search for ...

status
 quote
 live
 in-house
 on-hold
 special

include...
 incomplete
 complete

include...
 not final inv
 final invoice

(estimate) include...
 incomplete
 complete

key fields

project	- All -
campaign	- All -
team	- All -
job	Latest brochure design
phase	- All -
job type	- All -

Clients & contacts

Linked clients

The Linked Clients screen has been enhanced to allow adding/removing of child records from a parent record. Previously you could only add/remove parents from a child record.

Querying (client & contact's "torch" screen)

You can now query (or create views) taking into account the opt in / opt out status of clients, leads, & contacts.

organization opt-out status

email

opted out

not opted out

mail

opted out

not opted out

phone

opted out

not opted out

Client specific job status default

A "Job status" drop-down list added to the client card to allow overriding of company defaults for a specific client. Typically this would be used to specify that any new job created for a designated client defaults to being either an opportunity (quote status) or a live job.

client

details sales info misc prices media media history financial c

code	1/TEST2
name	AAK Foods
VAT	1 (20% - OUTPUT)
VAT reg no	
turnover	Quote 1440.00
investment o/bal	Live 0.00
investment	In-house 0.00
job prefix	On-hold
default status	Special
default charge type	Company Default done
posting account	


Synergist Client Portal

Note: The client portal is separate Synergist module. It is designed to allow your clients to log in and upload files, request new jobs etc. If you are interested in this module please contact your project manager.

Job requests

 + New job request

When requesting a new job from within the Client Portal it is now possible to select an account handler. Previously job request simply went to the default handler for the client.



The Professional Services Company

Dashboard

Post a new job request

For the attention of: Artie Shaw
Artie Shaw
- Blank -
Alan Octavian
Alan Prover
Alan Shearer
amy.winner
Arthur Spring
Attie Hun
Chuck Norris
Dave Harvey
david
David Stevenson

Job title

Message

Allocating passwords

The client portal administrator can now optionally send a password and a link to a potential client portal user. This is done in a client contact record within Synergist. Just click the email icon to the right of the portal password.

portal password	*****	
flowmation user	not linked	
facebook		
twitter		
linkedin		



An email similar to this will be auto generated:

Subject: client portal details

From: user@synergist.co.uk [mailto:user@synergist.co.uk]

Sent: 15 October 2013 18:55

To: mikejohn@hotmail.com

Subject: Client Portal details

Dear Mike

Please use the following login & password to access the Professional Services Company client portal

Login id: mikejohn@hotmail.com

Password: ABCXYZ

Access the portal via this link

[HTTP://192.168.0.239/clientportal](http://192.168.0.239/clientportal)

Flowzone (Flowmation) integration

Synergist v.10.7 will only support Flowzone version 5+

If you have an older version of “Flowmation” installed on your system, linked to Synergist, you should first get it upgraded to the latest Flowzone version before upgrading your Synergist system.

Sales & Marketing

Pipeline

New date filter added to job/opps criteria (torch screen)

“Current pipeline stage date”

This is the date shown under the current pipeline stage on the Sales Info tab of an opportunity. It represents the date the pipeline stage was last updated for the opportunity.

It is therefore now possible to create a view that shows all opps where the pipeline stage changed to its current setting during a selected period.

In this example the period is set for the “last 7 days” and it is also filtered to the pipeline stage “Initial communication”.

date range

date to use ▼ current pipeline stage date

all dates from to

use period dates

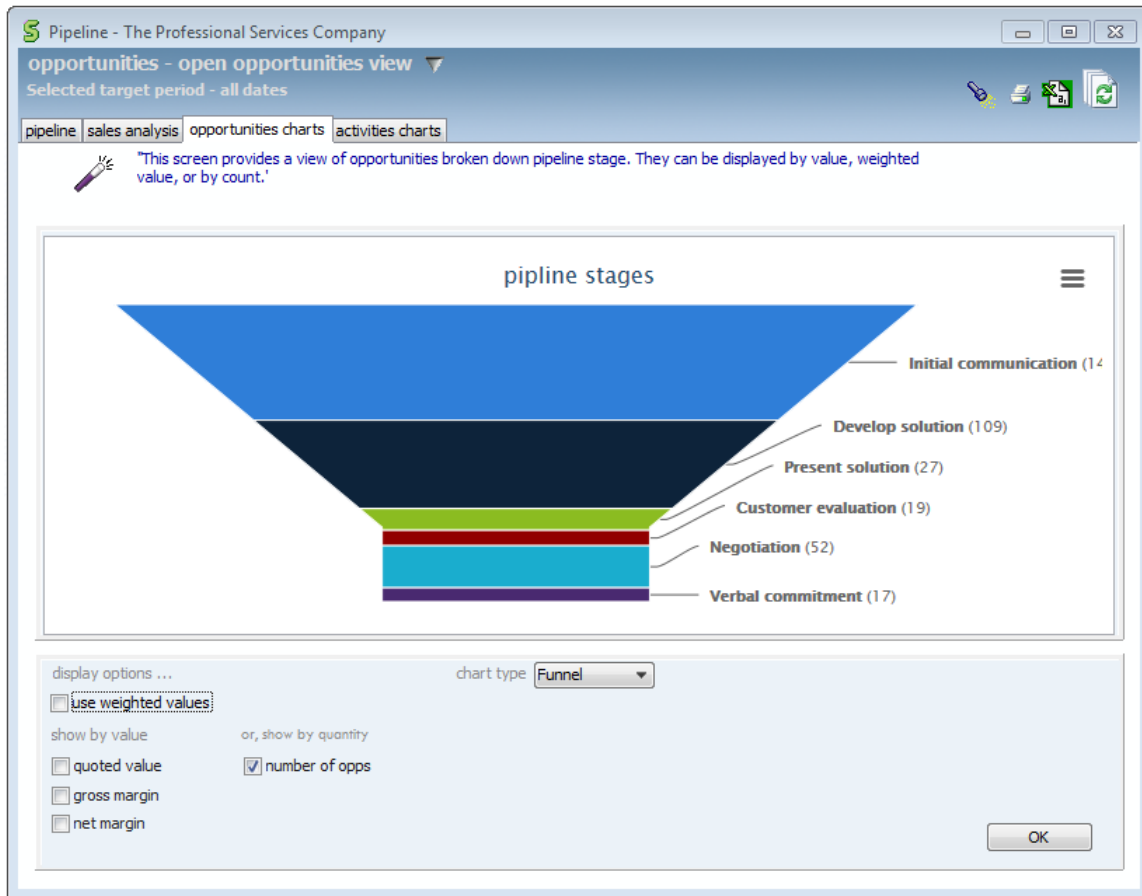
use a date range in the past in the future

select range ▼

Opp number	client	a/h	descr...	stage date	pipeline	%	status	rating	quote	grs mrg
16/1600028	Blue Harvest	RSS	Leaflet a	11/11/13 Mon	Initial commur		Open - New	Warm	1 500.00	1 500.00
16/1600027	Atlantic Mgmt Inte	RSS	London E	11/11/13 Mon	Initial commur	75%	Open - New	Hot	2 000.00	2 000.00
16/1600022	T1 Xpress	RSS	4 Colour	11/11/13 Mon	Initial commur		Open - New	Hot	500.00	500.00

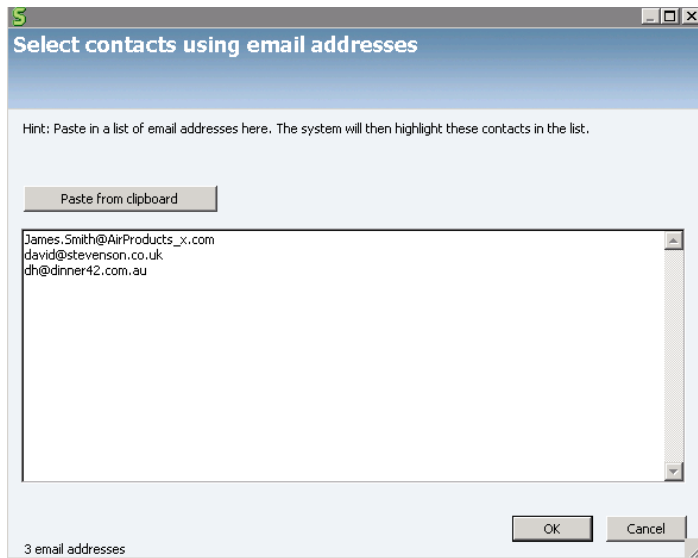
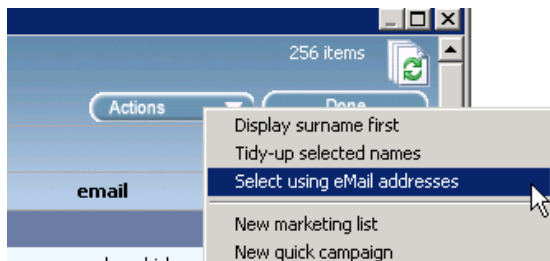
Sales Funnel Chart

A new chart has been added that allows the sales funnel to be visualized by value, weighted value or number of opportunities.



Selecting contacts & leads

Contacts & leads can be bulk selected and updated from an entered/pasted list of emails.



The result ..

name	role	organization	phone	email	type
Bradley Wilson		AG Site Services		bradley@email.com	Client
James Smith		Air Products		James.Smith@AirProducts_x.com	Client
Jake Loake		Airlock	20 7173 0600	jloake.com.old	Client
Jean-Luc Thiebaut		Airlock	20 7173 0600	jean-luc.thiebaut@airlock.com	Client
Oliver Williams		Albemarle	01497 168 56	Oliver.Williams@Albemarle_x.com	Client
Jim Griffin		APGL (Palm Beach) Developments	07553 438 76X	jim@pavilionson5th.com.au	Client
Rick Maddox		Aria Professional Services	5533 0355		Client
Dominic Hasbach		AST (Academy of Safe Therapies)	755220404	dominic@ast.edu.au	Client
Helen Tweet		Atlantic Mgmt International Limitec			Client
David Stevenson		ATQOL	07557 619 23	david@stevenson.co.uk	Client
John Woodley	Director	ATQOL	07557 619 23		Client
Helen Barber	Sales & Marketing	Aussie Wholesale Direct	756304245	jim@pavilionson5th.com.au	Client
Peter Aubort	Managing Director	Austcorp Investor Services Pty Ltc	07553 300 11	peter_aubort@austcorp.com.au	Client
Libby Anthony		Auswind - Australian Wind Energy	03967 020 33		Client
Mark Keelan		Automated Living Solutions	755732083		Client
Dominic Hasbach		Avant-Garde Marketing Pty Ltd	07552 217 05	dh@dinner42.com.au	Client
Meghan	Owner	Baby Boo	5576 0153		Client
Ian Henderson	Marketing Manager	Ballandean Estate	07468 412 26	ian@hallandeanestate.com	Client
organization address		Atlantic Mgmt International Limited 37/153 Lambert Street Kangaroo Point	business phone	mobile email web url	

Import Wizard enhancements

We now allow the following to be imported

- Invoice address
- CC Invoice recipient
- Delivery address flags
- Organization Handler/Owner
 - Match is done using full name, username or initials
- When importing suppliers ...
 - the supply type name can now be used in addition to the supply type code

Updating existing contacts

When updating existing contacts, the email address is also to be used to find a match (currently it simply uses first name + last name)

Contact export utility

Social media info added to contact export routine.

Reporting

“Email me a report” - On demand

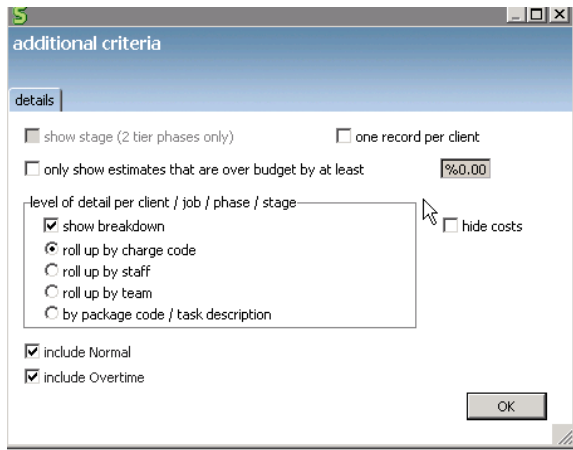
Any report that you select as “pdf” or “export” format will now include the option of receiving it by email. The report is generated on the server and emailed to you as soon as it’s complete. For a large or complex report this has the benefit of ensuring you don’t have to wait while it’s produced. In addition this will also provide a significant reduction in the time required to generate larger reports, as they are processed by the server rather than your desktop machine.

Missing timesheet report

It is now possible to exclude on the report any overtime that has been submitted.

Est. vs. Actual

“Additional Criteria” now includes/excludes overtime.



Estimate printout

Now includes estimated charge in currency.

Job Number 1/00008676.002 **Client** 1/MULTI Multi Currency Test
Order Number **Contact**
Handler **Phone**
Quoted 950.00 **Fax**
Project **Currency** 1/DOL

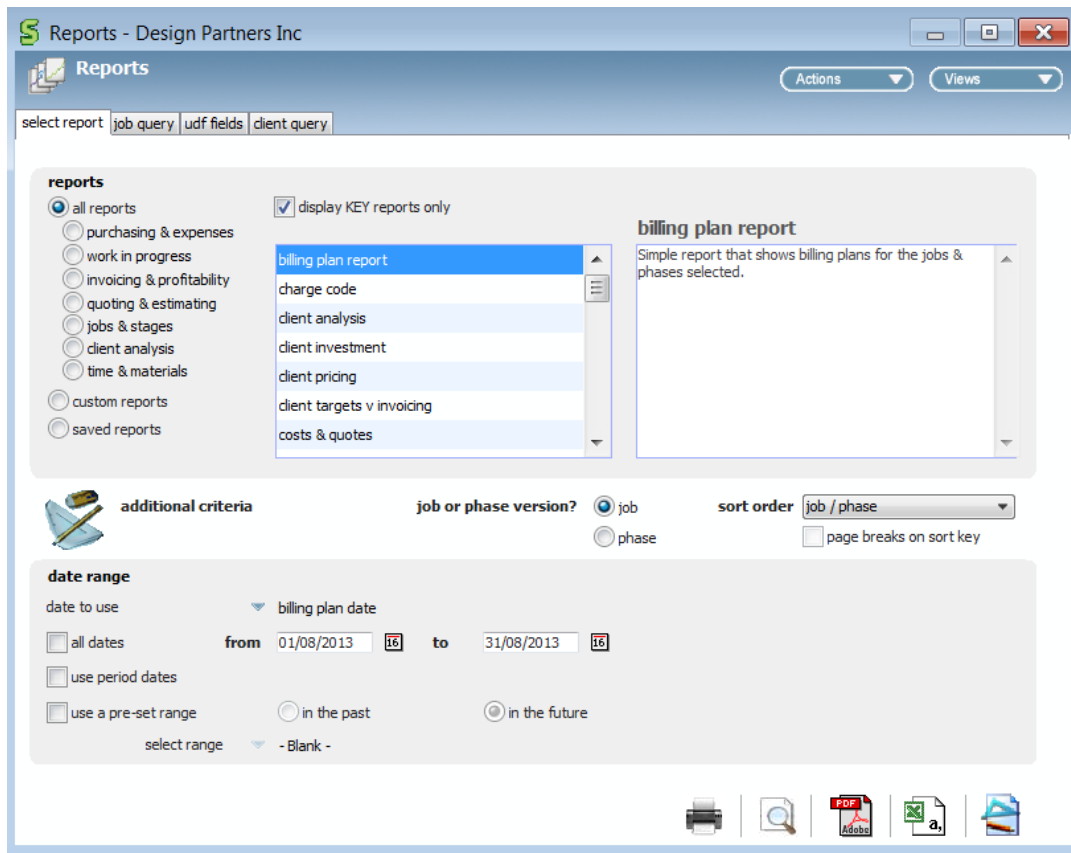
Description
 Brochure cover design

Comments

Type	Description	Est Unit	Act Unit	Est Chg Rate	Est Charge	Staff
	Brochure cover design				\$0.00	
Staff Time	- Project Manager	2.00		50.40	\$100.80	
	- Design	8.00		134.40	\$1075.20	
	Totals	10.00	0.00		1176.00	

Report selection UI

Cosmetic changes - the sort order of reports are now to be found on the first tab of the report selection dialog - and a drop down list of the options is presented to the user.



Materials report

This report can now be filtered by “timesheet staff” which will filter materials by the person who entered the materials.

Word templates

Word templates are used to create documents with embedded fields from jobs or phases. We are now including job / phase level user defined fields in the master field template (created by Generate button on document types input form).

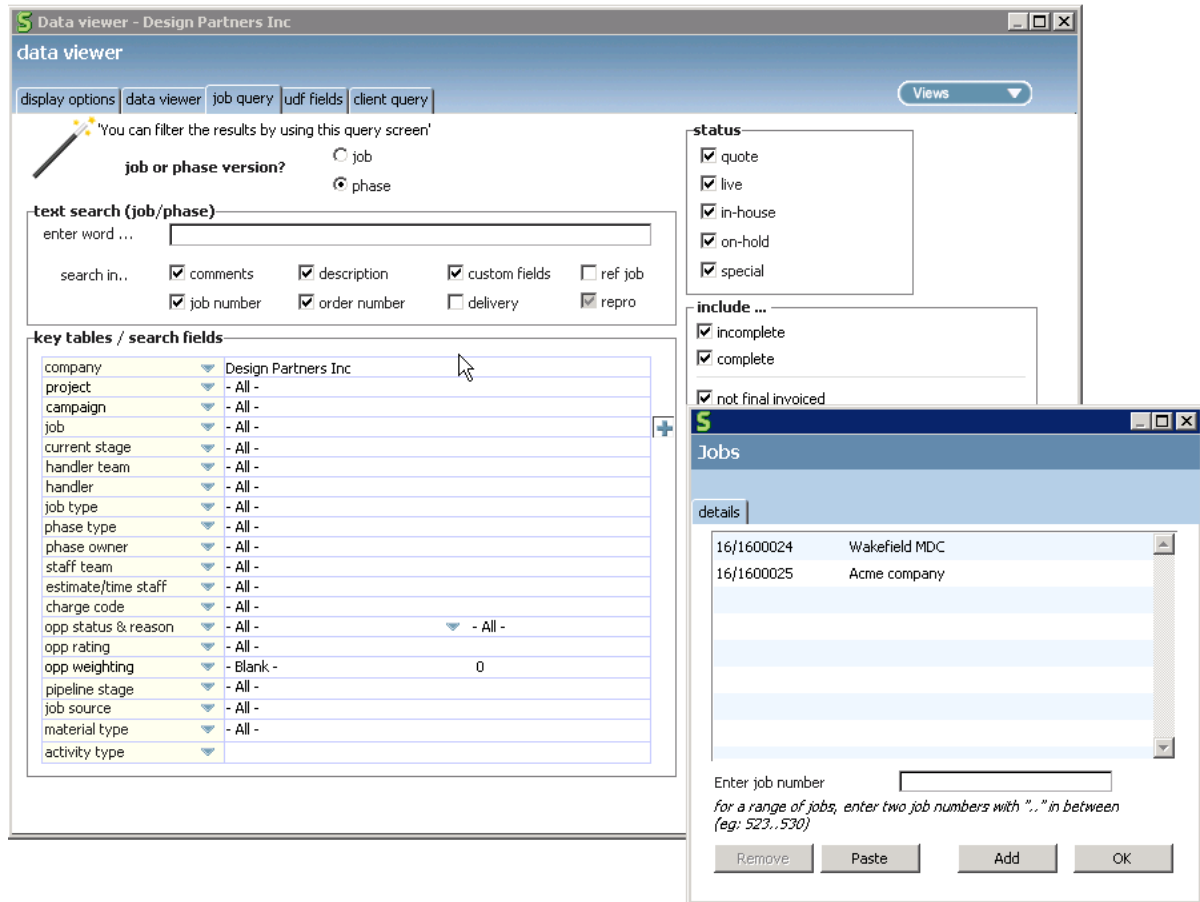
For more information on this feature please contact your project manager.

Costs & quotes report

The default setting is now “due date” rather than ‘final invoiced date’.

Data viewer

Icon added to data viewer job query screen (“plus” icon). Clicking this icon enables users to add individual jobs to the query.



Pre-set date range

It is now possible to select a “pre-set date range” and use this when saving a data viewer view. This means scheduled Data Viewer reports can now have a dynamic date range.

Example of date ranges:

This month

Last month

Last year ... etc.

date & period

01/01/2013 16 daily weekly monthly custom

Tuesday no. of months

use a pre-set range

▼ Last year

New data viewer option

Pending Timesheets option added to Data Viewer

Web reports

All standard reports are now available in the web portal as saved reports

Note:

- The standard parameters/criteria that are available in Synergist desktop version are unavailable on the web. However, users can specify a date range before running a report.
- Reports only appear if they are saved as “saved reports”. In this way the data selection criteria can be pre-selected for users.
- We support PDF, & CSV export and HTML export options for stored standard and manual reports. However, we can't currently offer the export options for custom reports unless they have been specifically coded to support exporting.

Data viewer - saved web reports & email alerts

Data viewer “saved views” can now be run via the Staff web portal and/or run on a scheduled basis (sent as emails).

Data viewer - set up a view

In this example this data viewer “view” has been created and saved. The user called the view “Invoicing (data viewer)”

This view automatically appears as an available report in the staff portal and in the report scheduler utility.

Select the items you want to see (drag them from the window on the left), set the date options, then click the refresh icon
Data Type will be automatically included if you don't select it yourself

auto refresh

Activity Owner Activity Type Bill-to Client Campaign Charge code Client Market Sector

Data Type Client

date & period
01/01/13 daily
 weekly monthly custom
no. of months 4
Tuesday
 use a pre-set range
- Blank -

options
 show descriptions
 show codes
 hide zeroes


to use one item for "columns", put a tick here

Data Type	Client	Jan 13	Feb 13	Mar 13	Apr 13	Total
Sales Billed	Acme company	0.00	0.00	0.00	100.00	100.00
	The Added Value Co.	0.00	0.00	110.00	0.00	110.00
	3D Animatronics	0.00	0.00	0.00	1000.00	1000.00
Totals		0.00	0.00	110.00	1100.00	1210.00

Copy... Chart

Reports section of Staff Portal

The report can be run and either saved to disc or output to the current web page (as per example below).

synergist 

Clients & Jobs Time & Expenses **Reports** Scheduling

Reports

Select Company
Design Partners Inc

Reports
Invoicing (data viewer)

Date Filter
From 01/01/13

Output Options
 CSV Export
 HTML File
 HTML
 HTML With Chart

Email Report Run Report

Data Type	Client	Jan 13	Feb 13	Mar 13	Apr 13	Total
Sales Billed	Acme company	0.00	0.00	0.00	100.00	100.00
	The Added Value Co.	0.00	0.00	110.00	0.00	110.00
	3D Animatronics	0.00	0.00	0.00	1000.00	1000.00
TOTALS		0.00	0.00	110.00	1100.00	1210.00

Scheduled emails

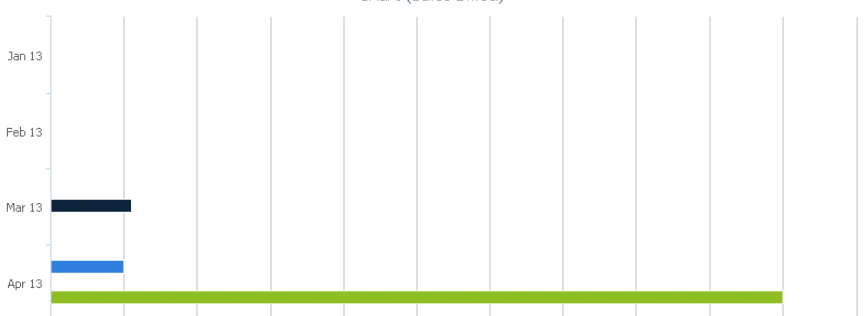
The report can also be sent as a scheduled email. Notice in this example the email also includes a chart. This is achieved by simply selecting the “HTML with chart” option when either running the report (from the web portal) or setting up the scheduled process (from “Tools & Settings / Utilities / Scheduler”).

From: devserver@synergist.co.uk Sent: Fri 24/01/2014 16:39
To: Mike Palmer
Cc:
Subject: Report Generation data viewer

synergist
Invoicing (data viewer)

Data Type	Client	Jan 13	Feb 13	Mar 13	Apr 13	Total
Sales Billed	Acme company	0.00	0.00	0.00	100.00	100.00
	The Added Value Co.	0.00	0.00	110.00	0.00	110.00
	3D Animatronics	0.00	0.00	0.00	1000.00	1000.00
TOTALS		0.00	0.00	110.00	1100.00	1210.00

Chart (Sales Billed)



Accounts links

Account periods

The validation of transactions, when using “accounting periods”, will now respect financial period dates as set up in file maintenance, even if these are not full calendar months. Previously all validations assumed financial periods spanned from the beginning to the end of a specified month. This modification effects Sales Invoice dates, Tick-off dates, Purchase Invoice (posting) dates, Expense Sheet dates, and Timesheet dates.

Sage 200

Auto-payments (expenses)

We now support exporting “payments and receipts” in addition to purchase invoices across to sage.

This is to facilitate posting cheques that have been issued to people who are not set up as true suppliers in either Synergist or the linked accounts system. It can be useful for companies who issue cheques to members of focus groups. It can also be used to handle petty cash.

A special “supplier” is set up in both Synergist and Sage 200. For example “Focus groups”. This supplier is marked as being an “auto-payment” account in Synergist.

Whenever expenses are added to an expense sheet for this supplier the user is prompted to enter a cheque number and a name (typically the name of the person to whom the cheques was issued). When this expense is processed and posted it automatically exports a “payment” (or a “receipt” if the expense is a negative expense).

KashFlow

Kashflow is a cloud based accounts system. Synergist now supports posting client and supplier invoice transactions to KashFlow.

Please contact us for details of how to configure the KashFlow link.

Miscellaneous

Batch update

The “managed by” fields can now be updated using the batch update functionality.

Shortcut for adding a new line

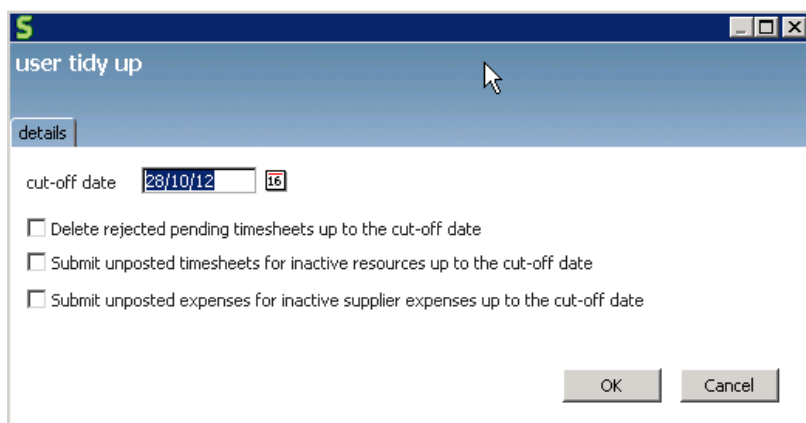
F3 has been assigned as a shortcut key for adding lines to:

- Invoice lines
- Quote lines
- Purchase order lines

User table

The new “User tidy up” routine can be used to tidy up existing data if a member of staff leaves without submitting time sheets etc.

You’ll find it on the actions button of the user card.



Gantt reports for Mac users

Gantt Export to Excel now available for Mac Users

Standard list refreshes

We have changed how main lists are refreshed after a user drills down to edit a record. Previously, if a user amended or deleted a record and then closed it to return to the list, the list would refresh and the user would lose his/her place in the list. Now records are left in the previous order / state. This makes it much easier to step through a list of items on the screen, sequentially updating records.

HMReports

HMReports is a powerful new report writer we are introducing into Synergist as an eventual replacement for Super Report Pro. There is a facility to convert existing Super Report Pro reports and layouts into HMReports versions. However, as we can't be certain their appearance will be identical following the conversion, your reports will not be automatically converted on upgrade. For this reason you should only convert reports and layouts under instruction from the helpdesk who will provide full details as required. At this stage all existing reports will continue to operate and we will send further communications prior to performing any widespread automated conversions of layouts or reports.

64 bit version of 4D server for Windows

Synergist can now be run using the 64-bit version of 4D Server on Windows. The benefit of this being that you can allocate much larger memory cache sizes if you have the physical RAM to do it. Larger cache=improved performance for those with larger data/index files. If you feel this may be of benefit to you, please contact the helpdesk who will explain the benefits you would see from this.

SSL

SSL support for Pop3 & IMAP TCP/IP protocols

Synergist now supports SSL when accessing email (for email integration) via Pop3 & IMAP. This facilitates the use of cloud based email servers like Gmail.

SSL support for SMTP

Synergist now supports SSL when sending emails from Synergist Server (e.g. job alerts)

User permissions

Minor improvements to the reports section of the user permissions screen. Pipeline tool can now be restricted and some naming conventions have changed.

4D menus

- jobs/purchases/T&M
- tools & settings
 - company settings
 - file maintenance
 - users and staff
 - utilities
- reports
 - standard reports
 - custom reports
 - data viewer
 - pipeline
 - report designer
 - manual reports

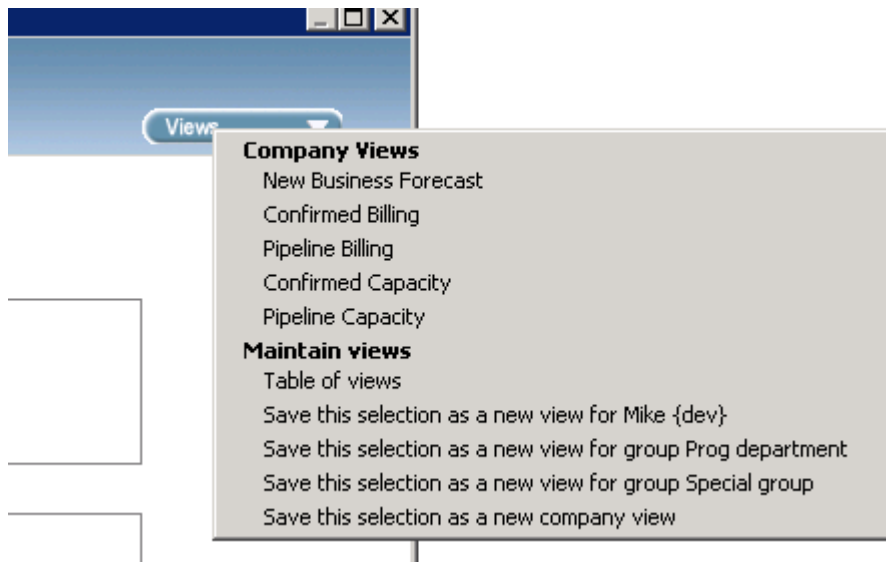
Charge codes

The maximum length of Charge codes have been increased to 10 chars (including the company prefix).

Data viewer defaults

On creating a new company, standard default views are created in the data viewer.

- New Business forecast
- Confirmed billing
- Pipeline billing
- Confirmed capacity
- Pipeline capacity



Standard Lookups

Facility added to enable users to re-order items in a lookup list by dragging rows up or down.

Also, standard lookups for auto-created data for new companies are now ordered logically.

Email (Mac)

Added ability to eMail using Postbox <http://www.postbox-inc.com/> on the Mac. Postbox supports Apple script.

Transferring costs

The red text in the transfer window 'only un-ticked costs are available for transfer' has been added back in for clarity. It had previously been removed

New-company defaults

Timesheet tab - company settings

On creating a new company - materials are now switched off by default.

These are the defaults...

hide these fields

- materials
- timer (synergist client only)
- overtime overtime2
- complete job/phase
- work done (web only)
- weekly view (web only)
- client
- phase type (web only)
- hours required (web only)
- material code (web only)
- my task comp (web only)
- activity (web only)
- stage complete (web only)
- move stage (web only)

Web portal

Client record

Previously the invoices, projects, jobs and phases tabs were hidden if a user did not have read write access to invoices/jobs/phases (e.g. the user only had a web time sheet license). This has been opened up to make these tabs visible to all users. However, we still only allow read write of invoices/projects/jobs/phases if the user has licensing or access rights.

Timesheet daily list

Handler name on Web timesheets - added as hover text

PDF email integration on mac client

New option added to switch off PDF email integration on mac client.

Previously Synergist only supported these options:

- Entourage
- Apple mail
- Outlook
- Postbox

This was problematic for users who have no email integration set up, or who have an email client installed that doesn't support PD integration (e.g. Thunderbird)

We have now added a “None” option which will disable emailing features, while leaving PDFing facilities in place.

END OF DOCUMENT
