synergist®

v10.7 Release Notes

Note: Synergist v10.7 requires 4D v13

Contents

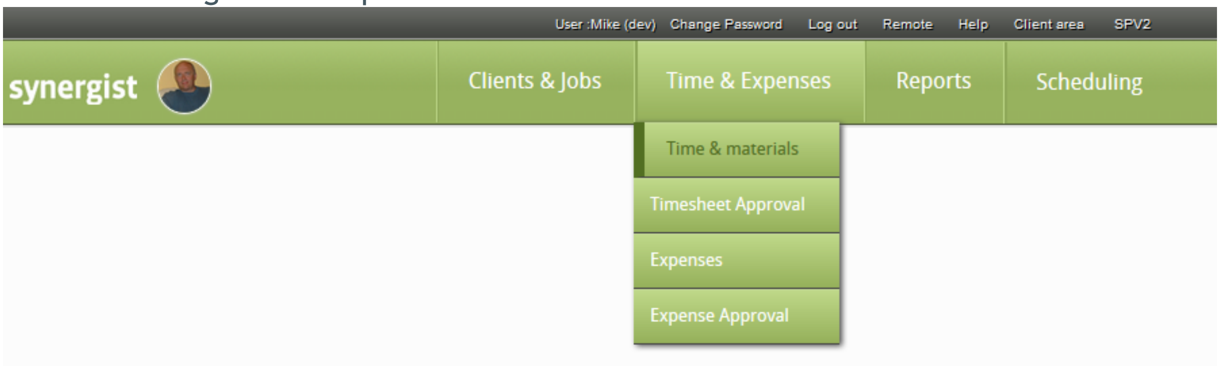
Staff Portal

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.

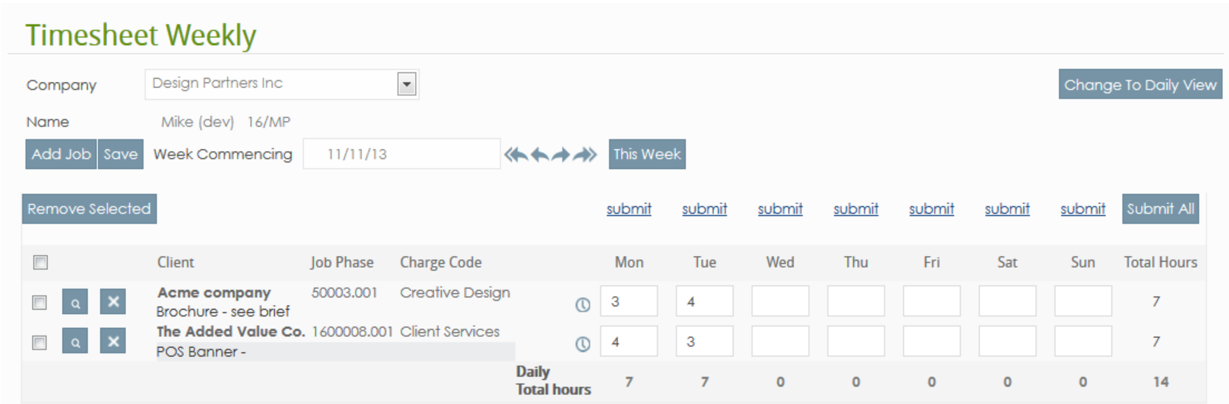
New menu

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



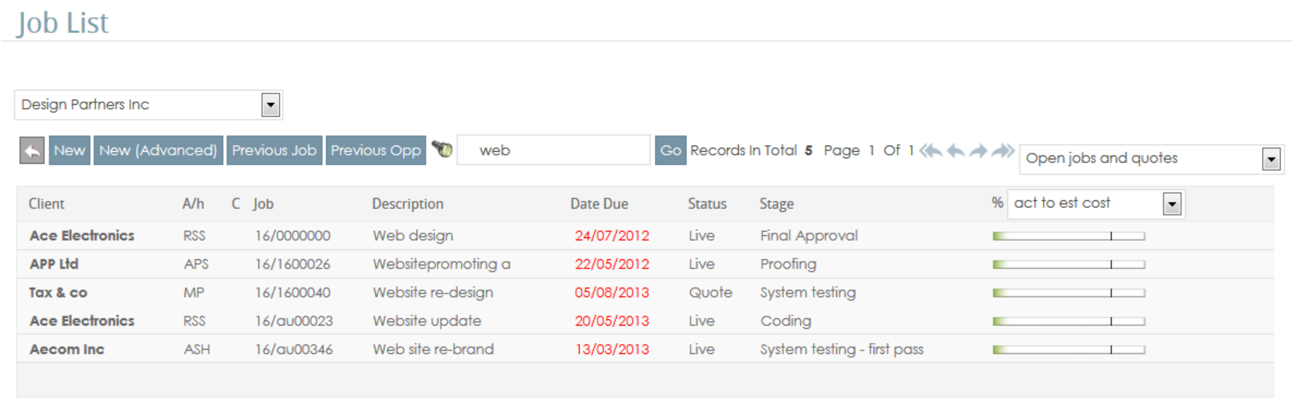
Timesheets

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



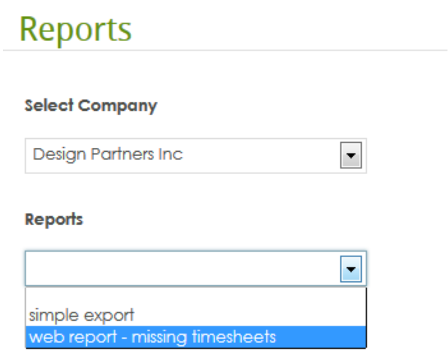
Jobs

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.



Reports

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



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)

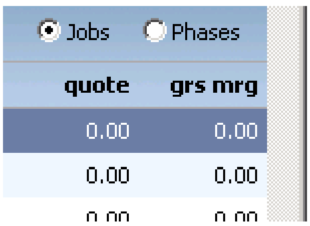
- “Normal to estimated hours”
- “Normal to baseline hours”

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.

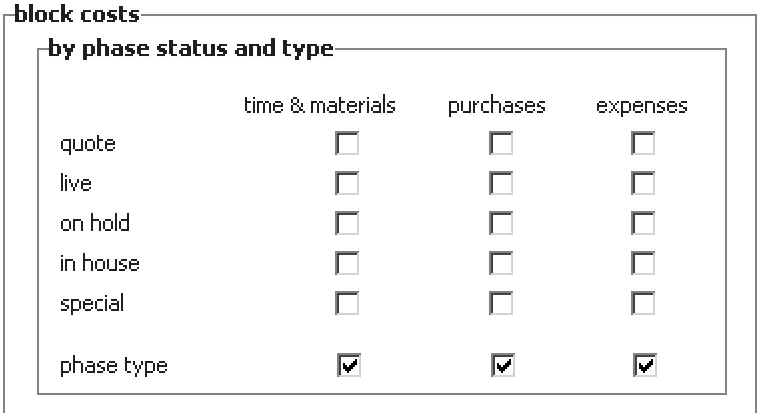


Inter-company purchasing

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

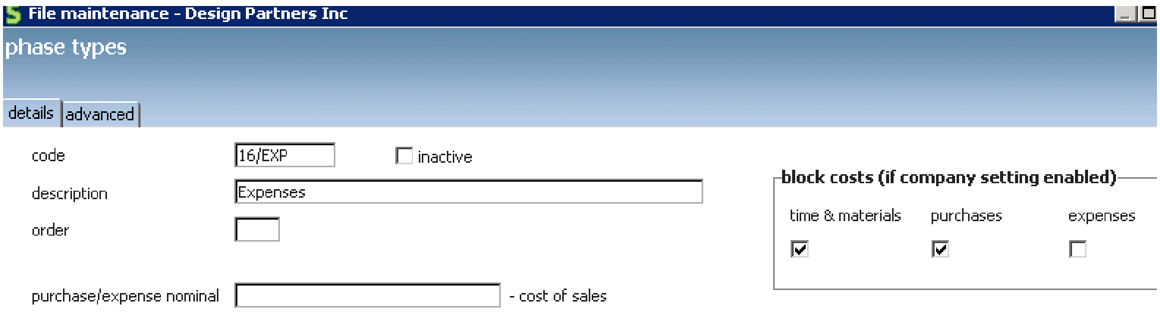
Block costs by phase type

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.



Phase type

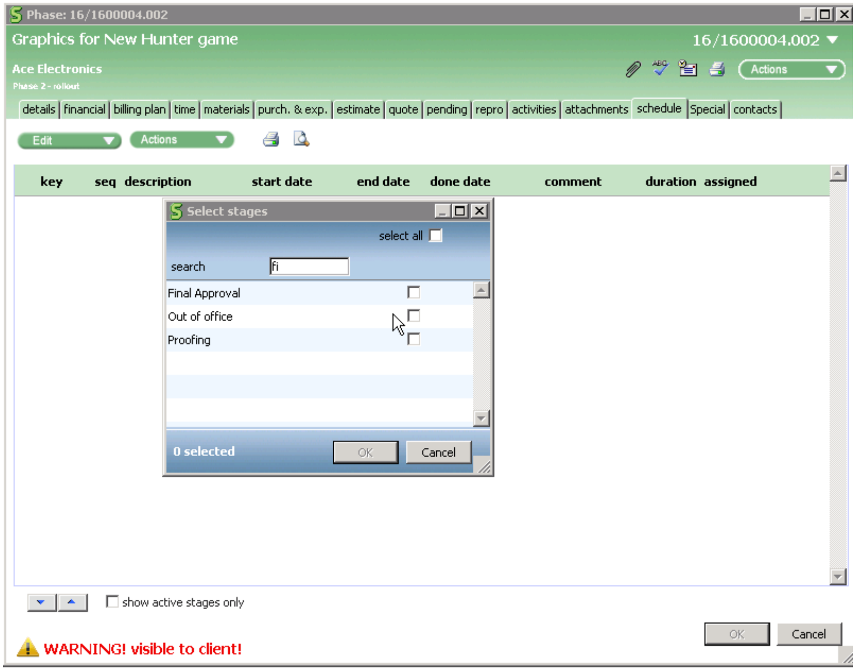
In this example phase type “Expenses” is now set to block all costs apart from expenses.



Search feature

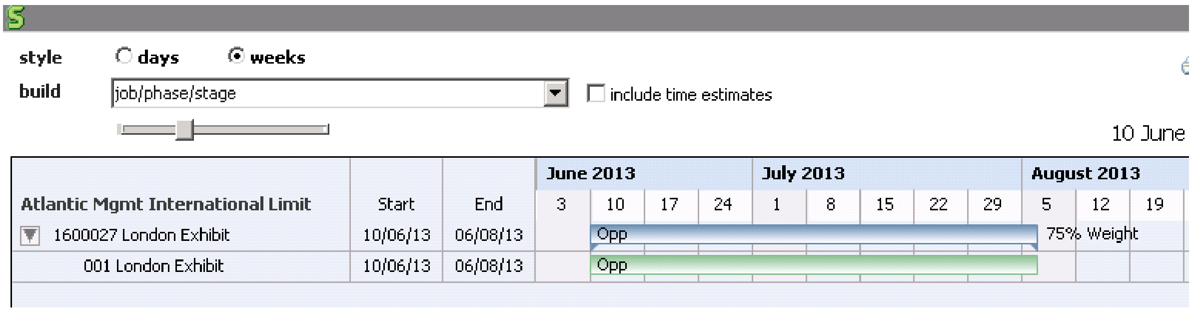
Job/Phase stages

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)

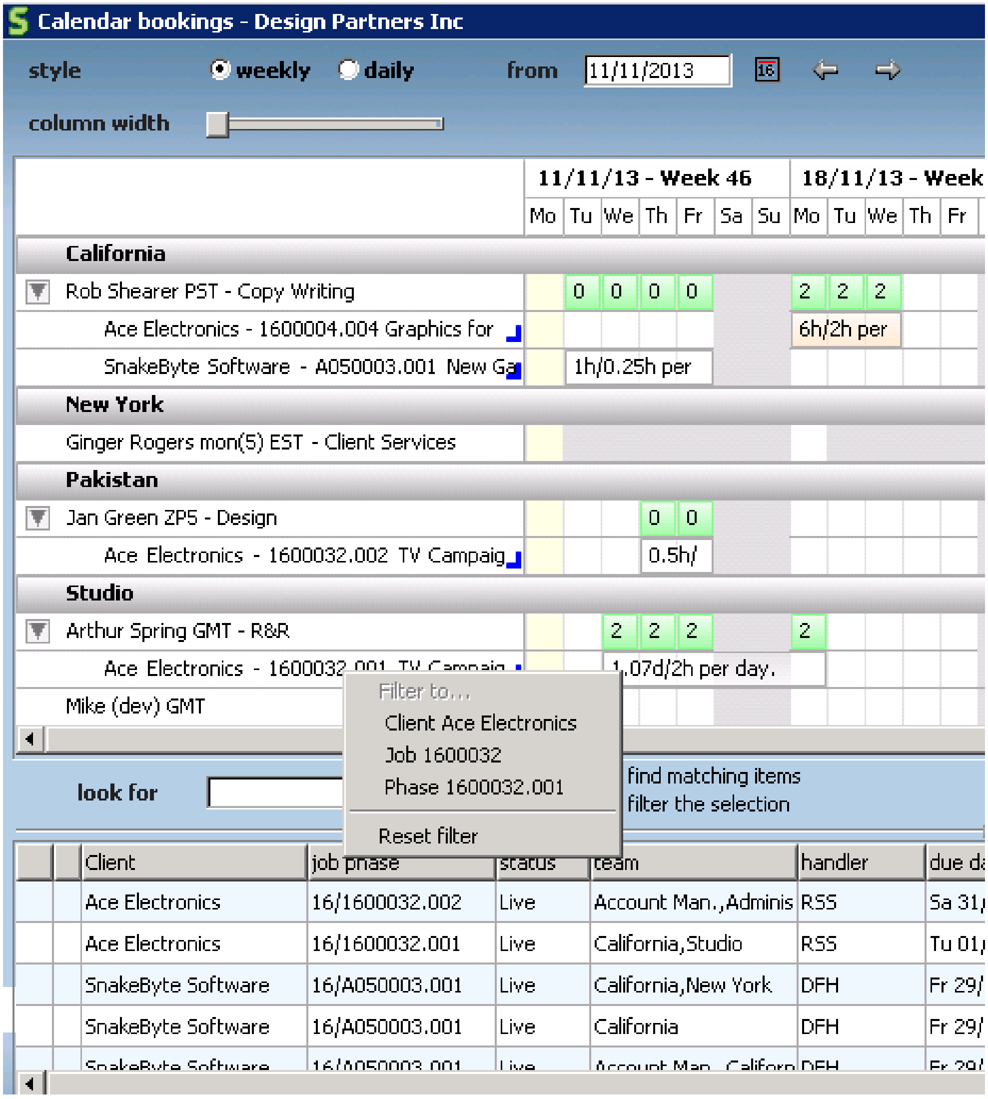


Work allocation calendar

Filtering the view

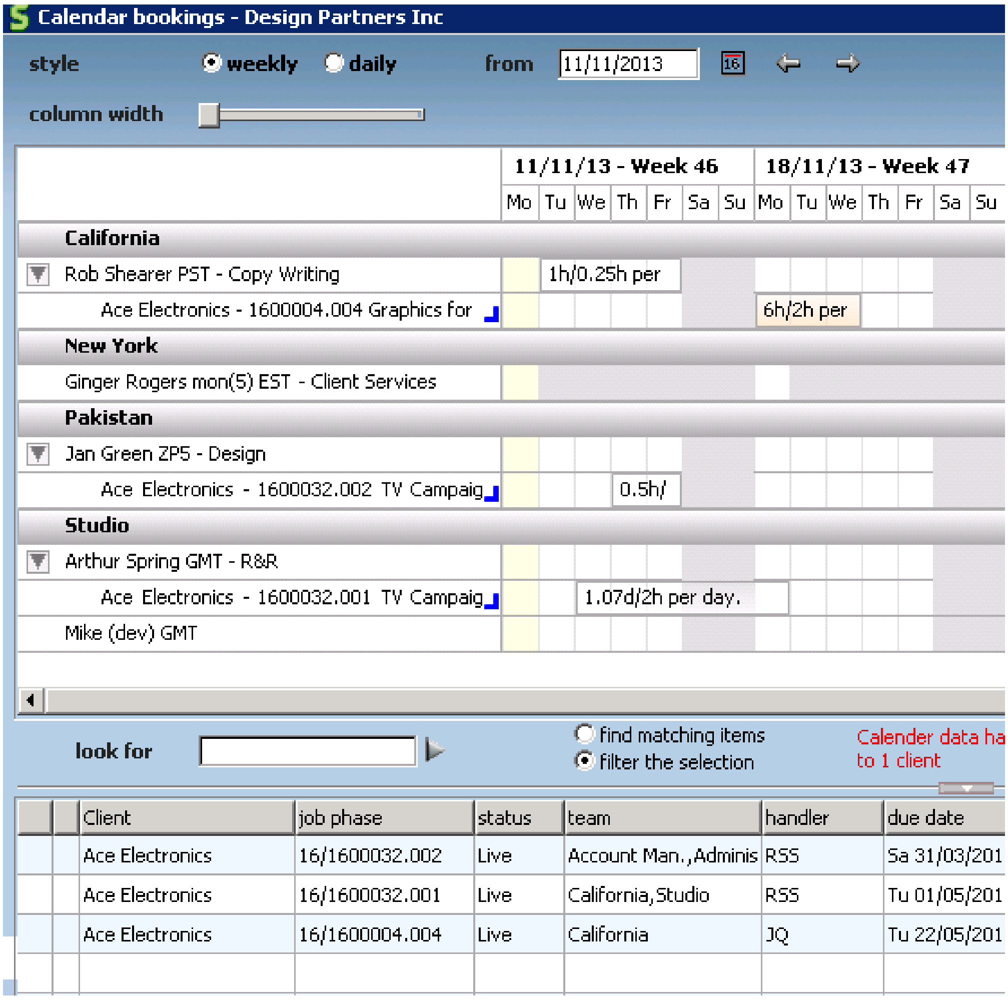
If you wish to see a subset of the work allocated in the calendar you can now apply a filter. You can filter the view by client, job, or job phase.

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”



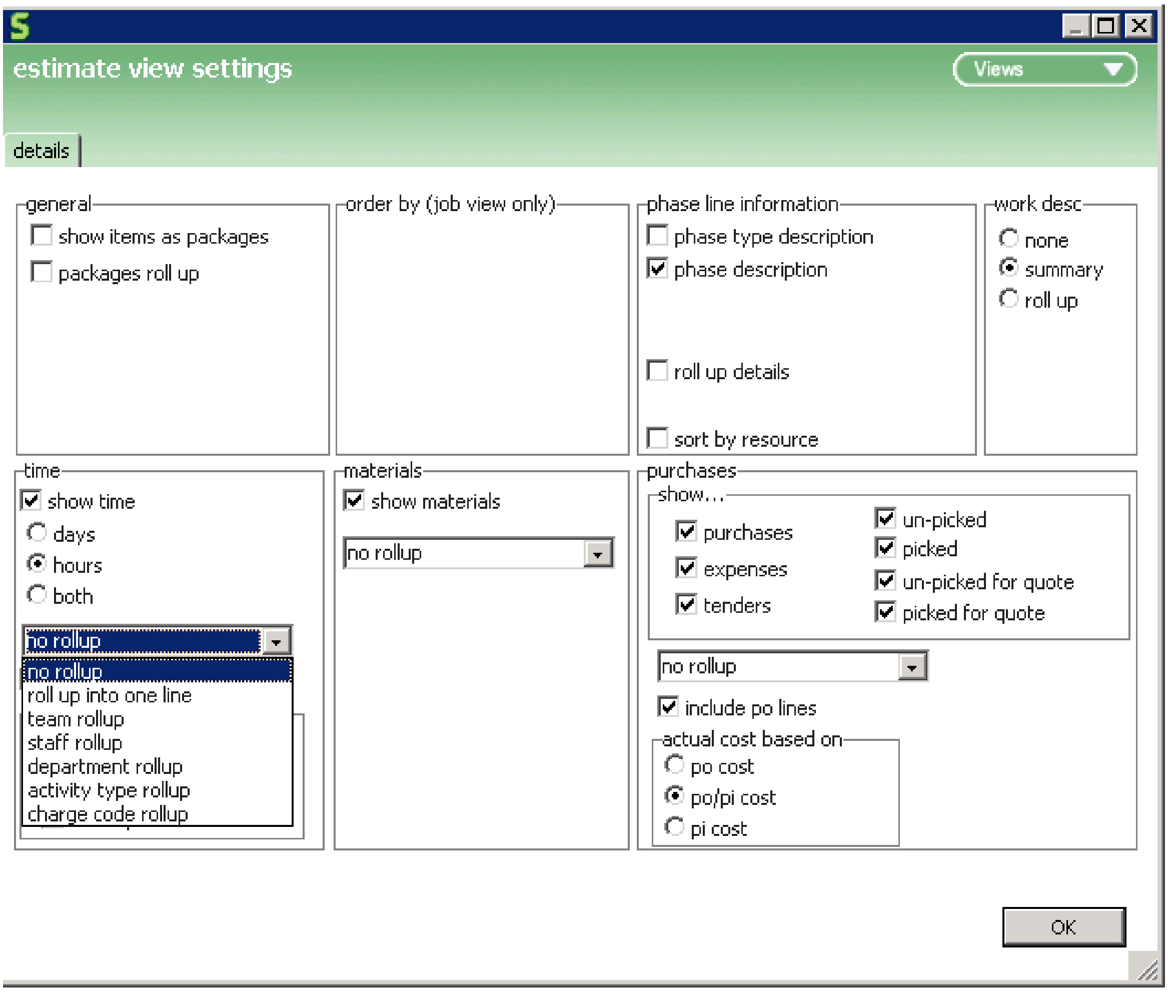
The result

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

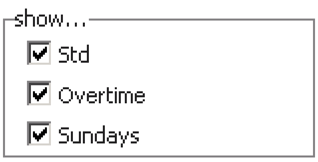


Estimate view settings (torch) screen

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



Actuals can now be filtered by overtime.



Purchasing

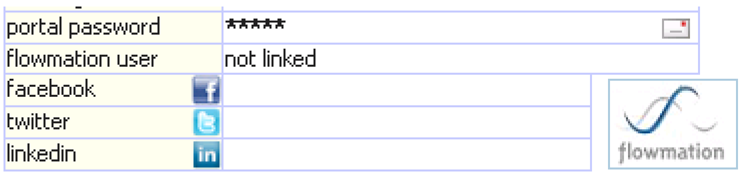
Nominal builder override

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.



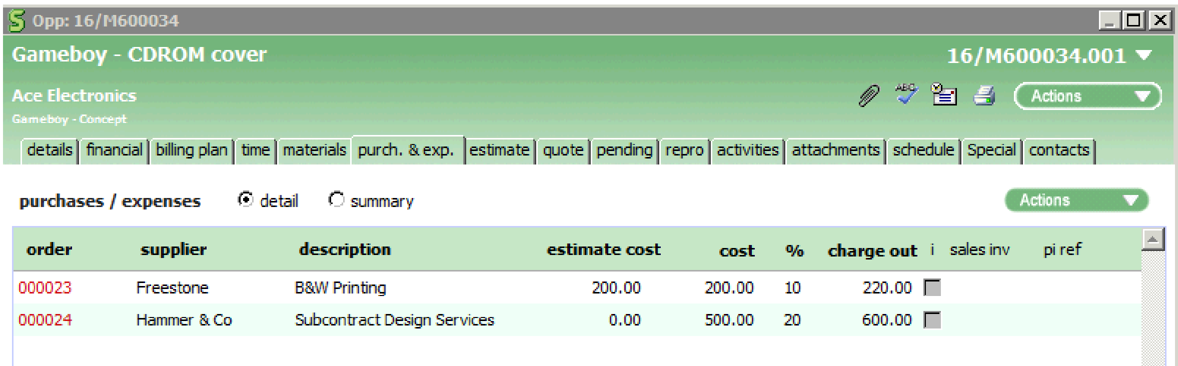
Once this has been done any purchase invoices exported for this supplier will use the nominal code entered here.

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.

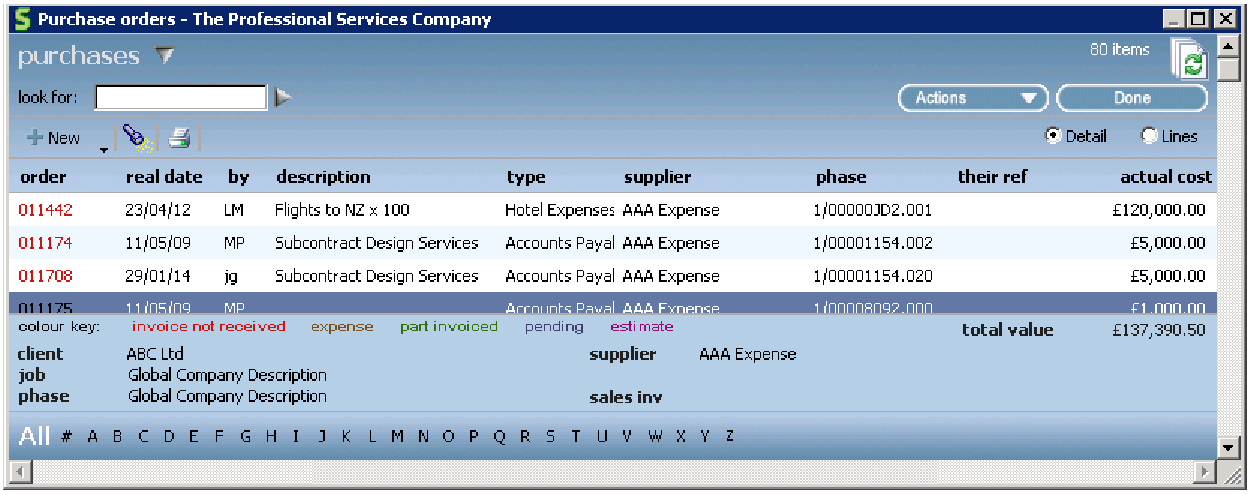
Sorting

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



Purchase order list

"Total value" added to the bottom of the purchase order list.

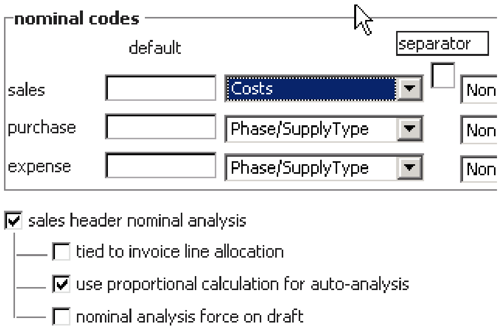


Builder options

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

Analysis by “Cost”

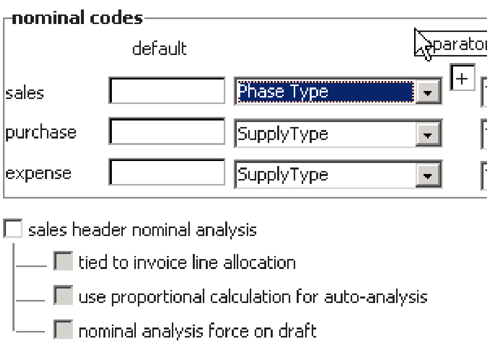
- This feature affects header analysis only, and when not “tied to invoice line allocation”
- The builder can now be used by companies using header analysis. A category "cost type" has been provided. If selected, when building the analysis breakdown of an invoice, the system will inspect estimates related 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



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”)



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.

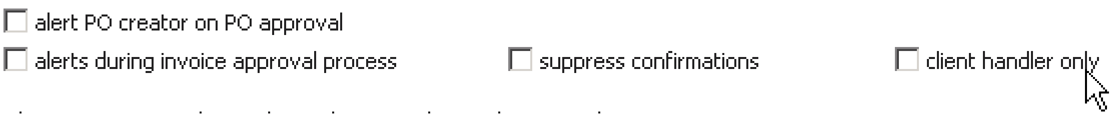
Invoice auto-detail invoicing

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



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”.

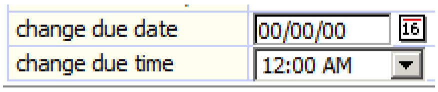
Previously there was only a combined option (Start date/expected close date). Adding a new option allows just the “start date” to be used.

Activities

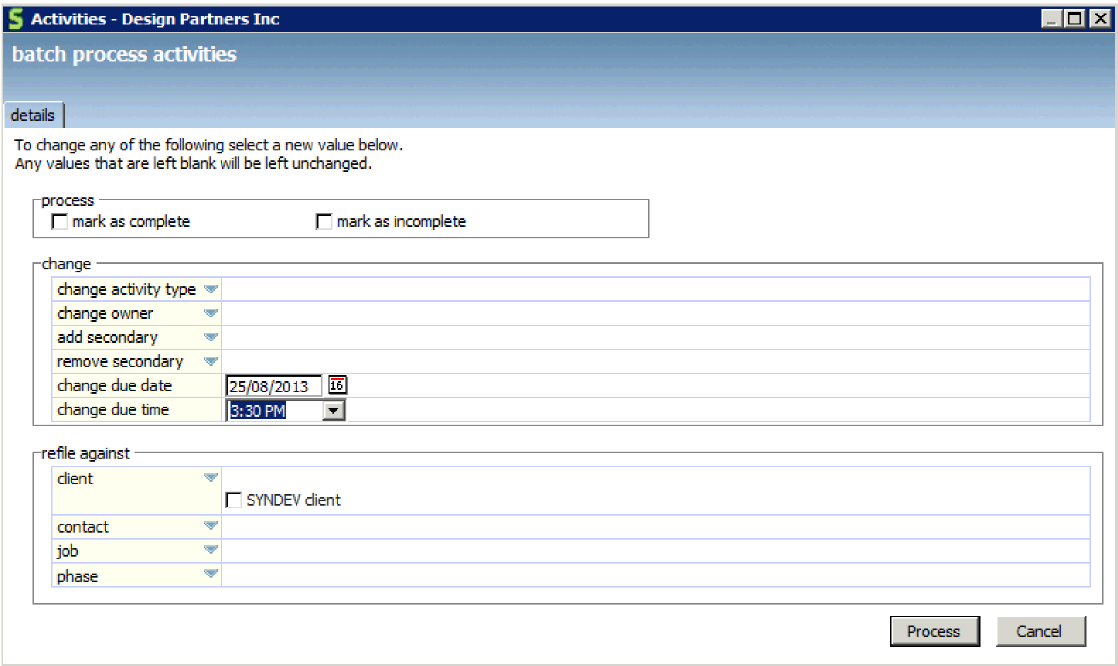
Batch update

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'



New date and time selected…



.

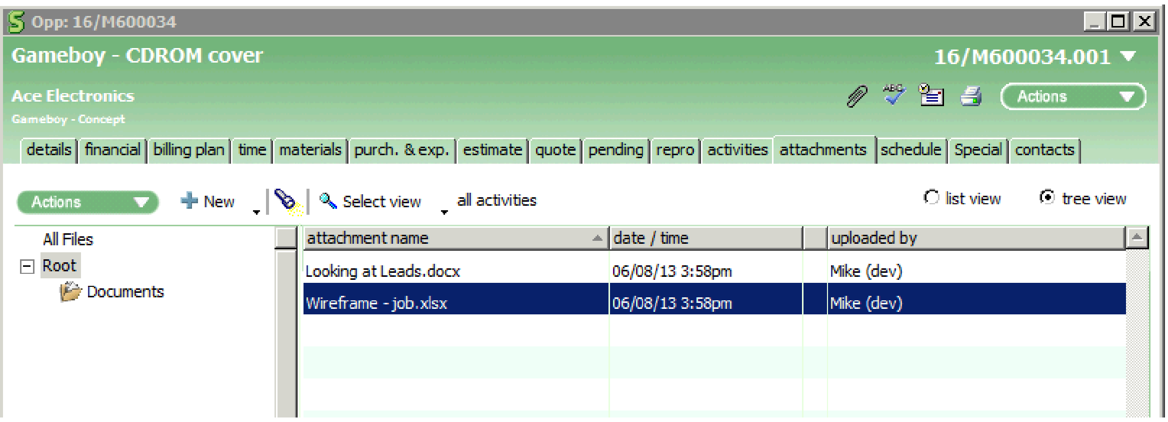
..

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

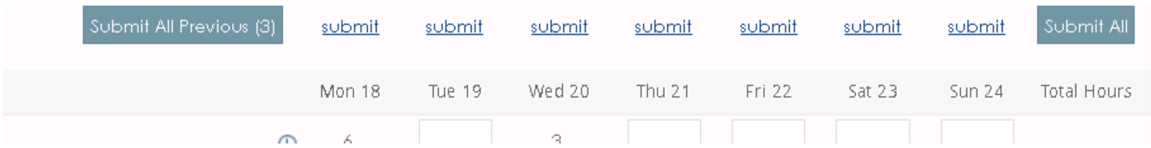
We have improved the performance when listing attachments.

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

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)



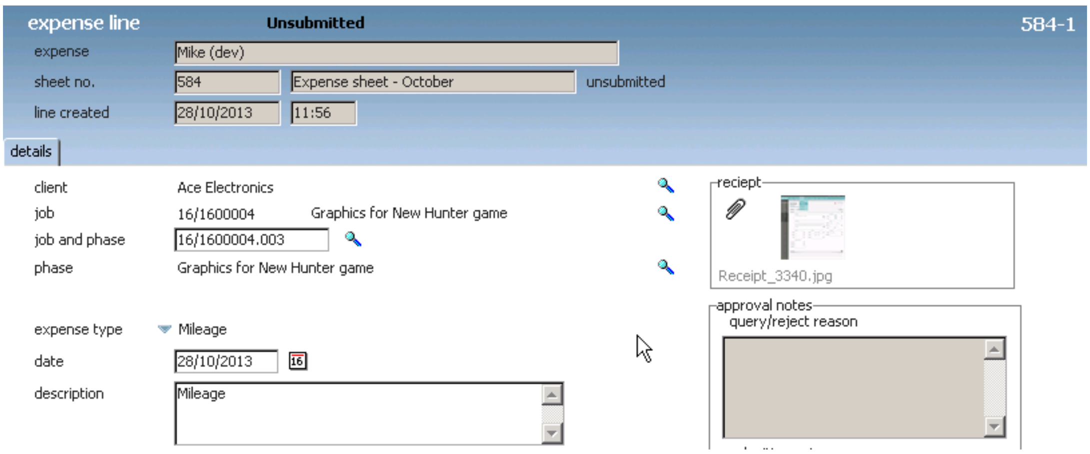
Timesheet approval Alerts

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

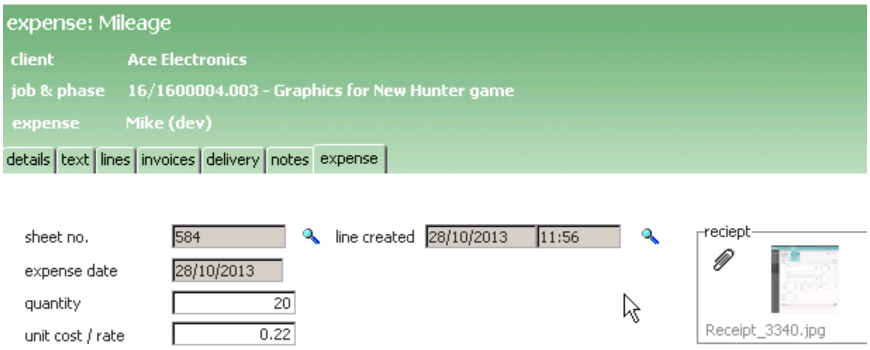
Expenses

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.



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



Invalid data input

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

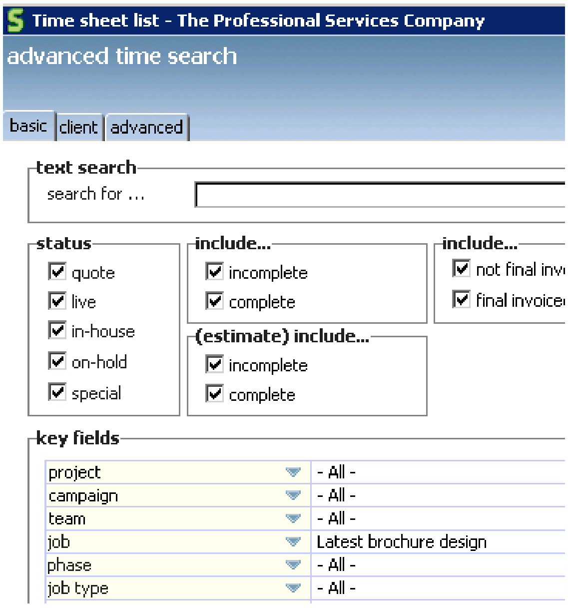
If a user enters “1 min”

The system flags that this is 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.

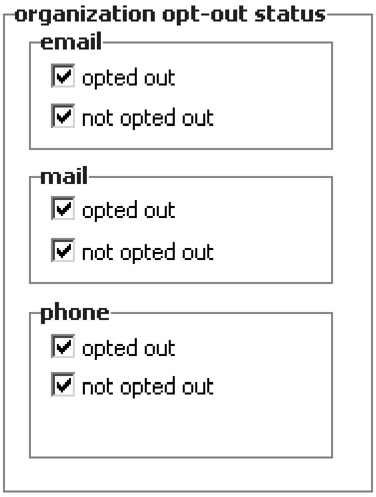


Linked clients

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.

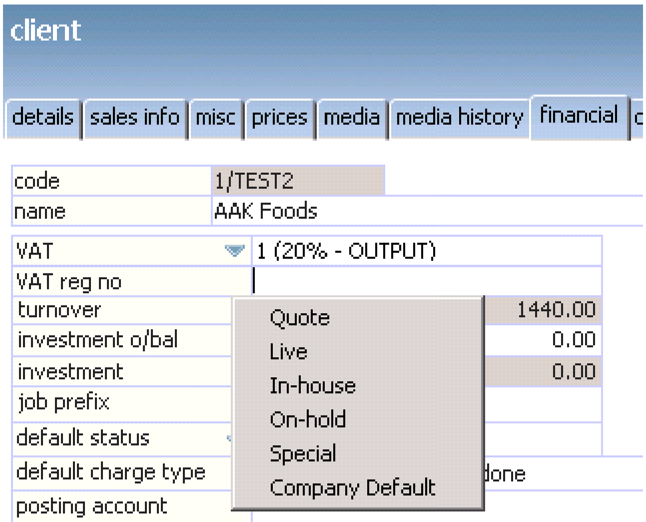
Querying (client & contact's "torch" screen)

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



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.

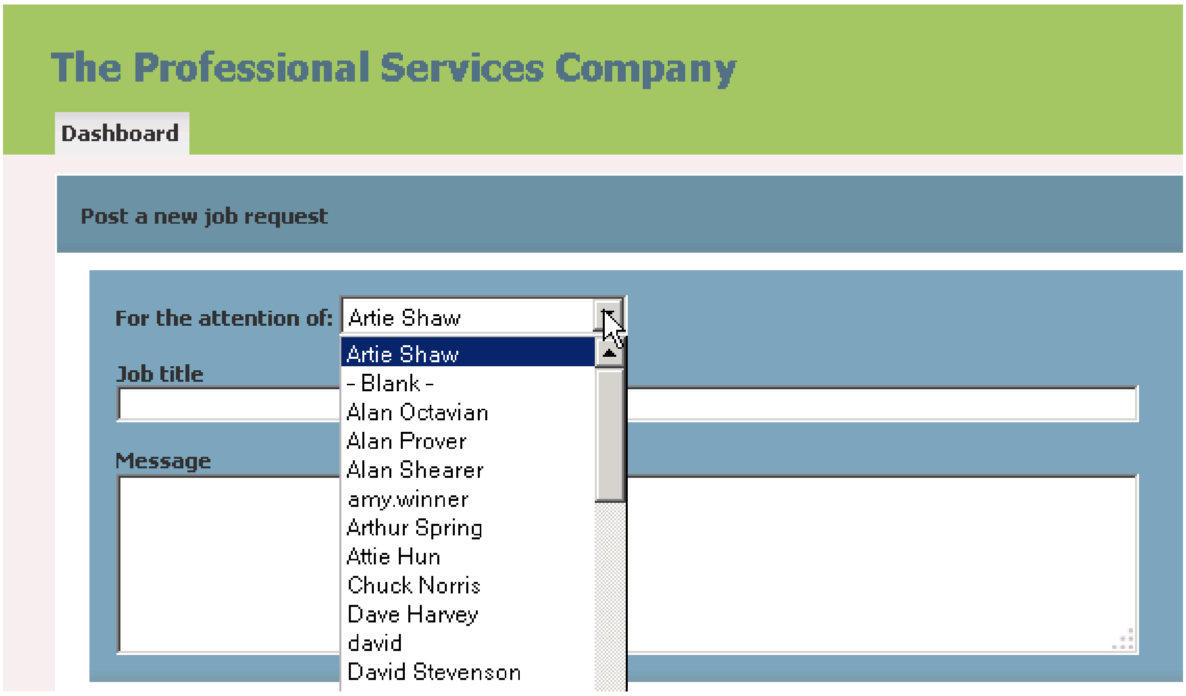


Synergist Client Portal

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.

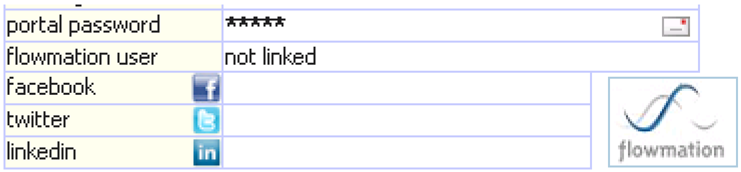
Job requests

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.



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.



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

Flowzone (Flowmation) integration

Synergist v.10.7 will only support Flowzone verson 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

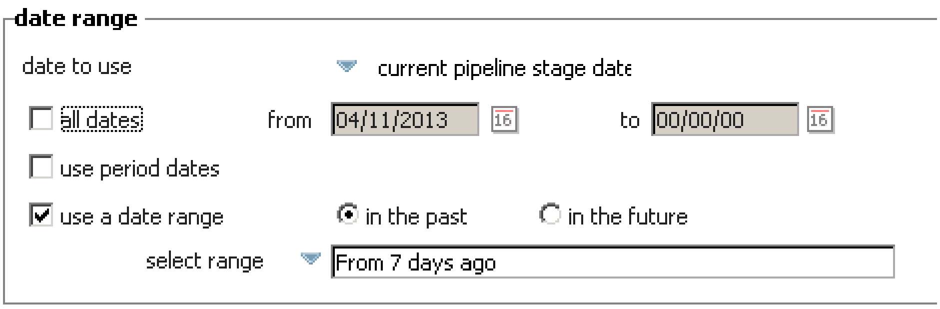
New date filter added to job/opps criteria (torch screen)

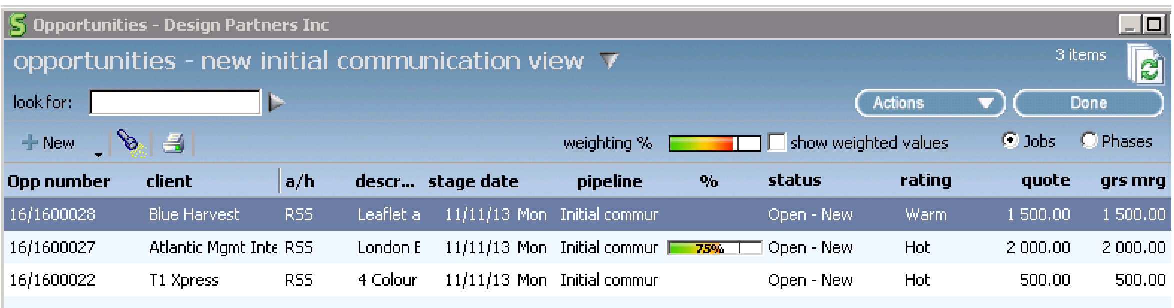
“Current pipeline stage date”

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.

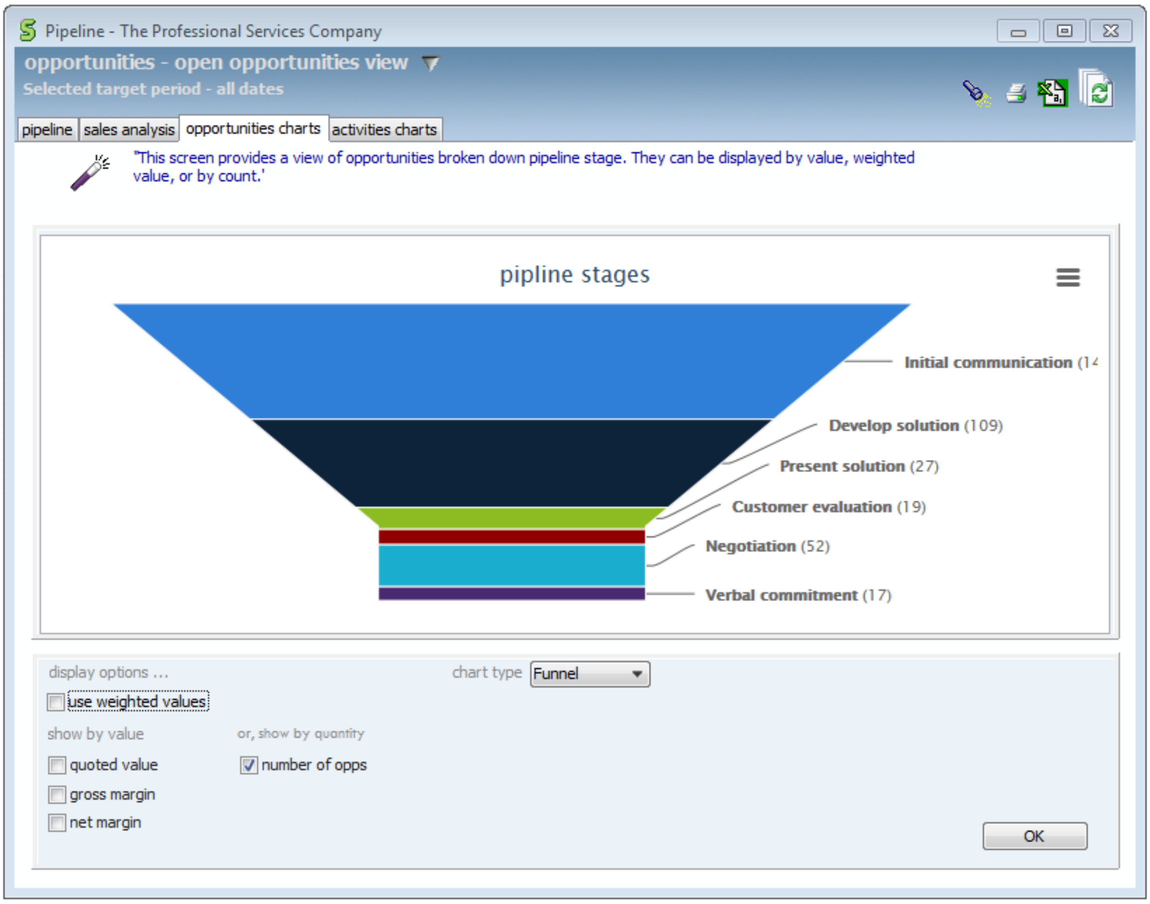
In this example the period is set for the “last 7 days” and it is also filtered to the pipeline stage “Initial communication”.





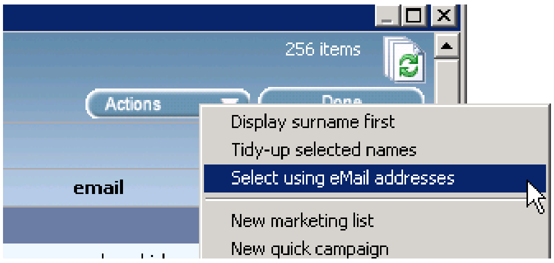
Sales Funnel Chart

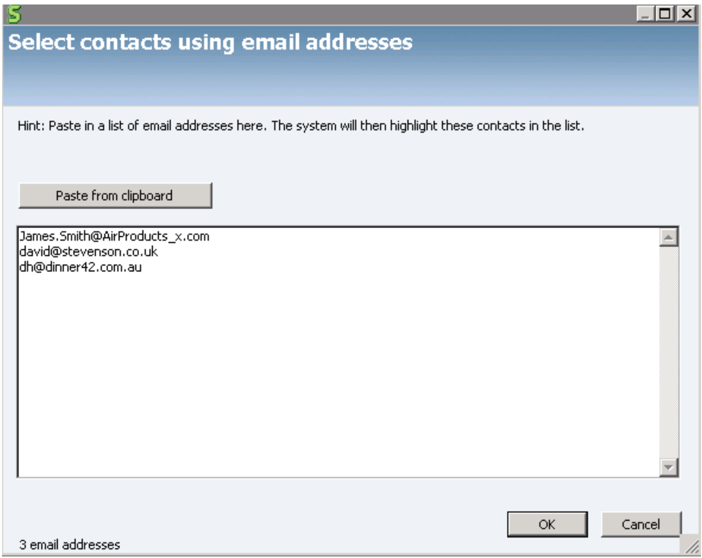
A new chart has been added that allows the sales funnel to be visualized by value, weighted value or number of opportunities.



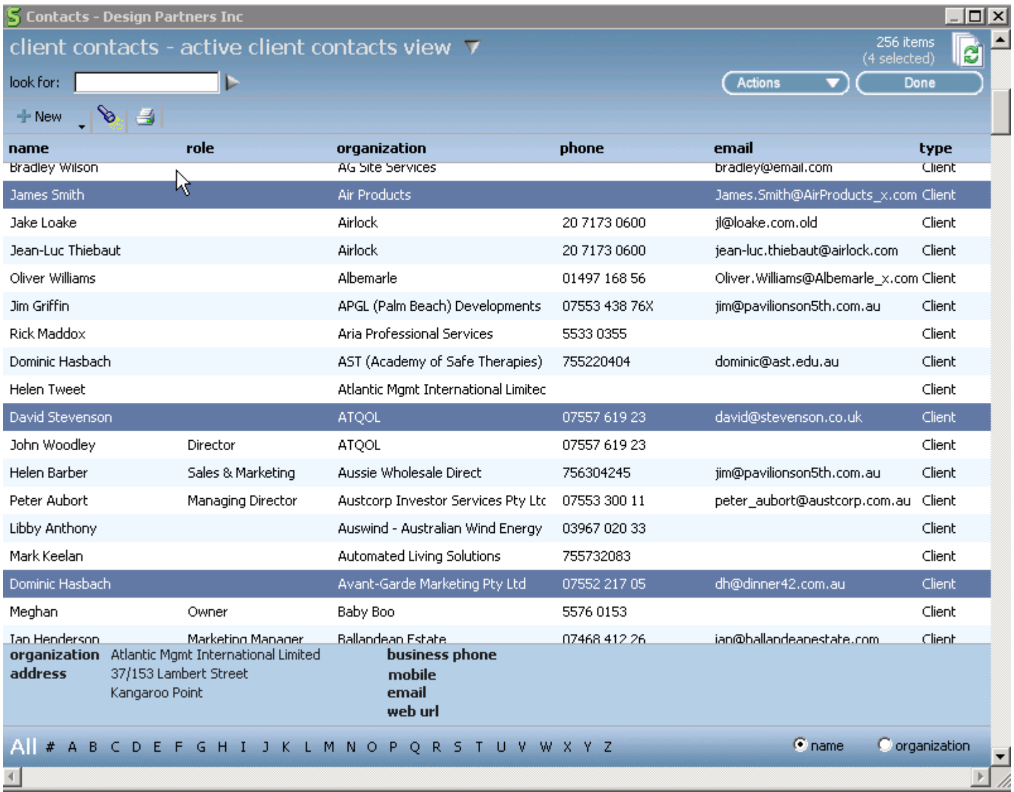
Selecting contacts & leads

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





The result ..



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

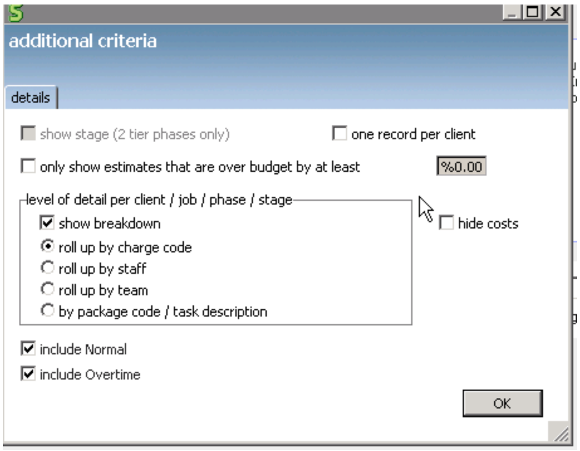
Any report that you select as “pdf” or “export” format will now include the option of receiving it by email. The report is generated on the server and emailed to you as soon as it’s complete. For a large or complex report this has the benefit of ensuring you don’t have to wait while it’s produced. In 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

Order Number

Handler

Quoted 950.00

Project

Client 1/MULTI Multi Currency Test

Contact

Phone

Fax

Currency 1/DOL

Description

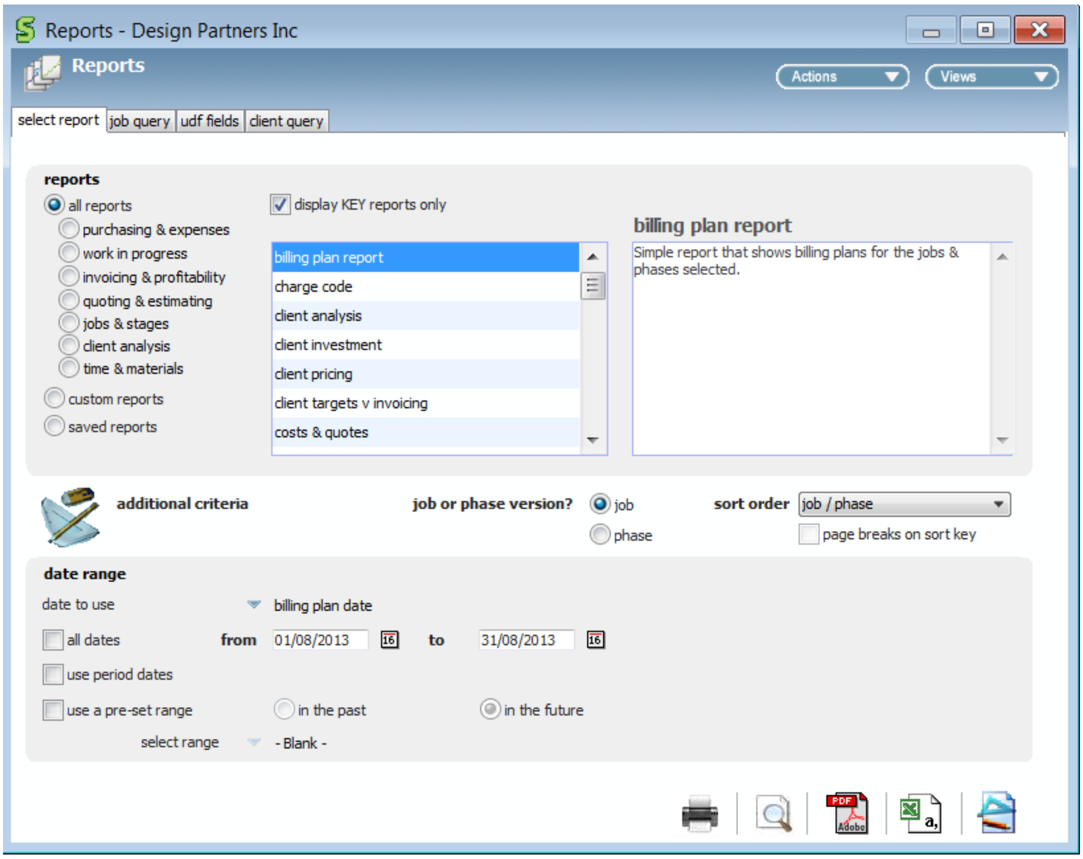
Brochure cover design

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).

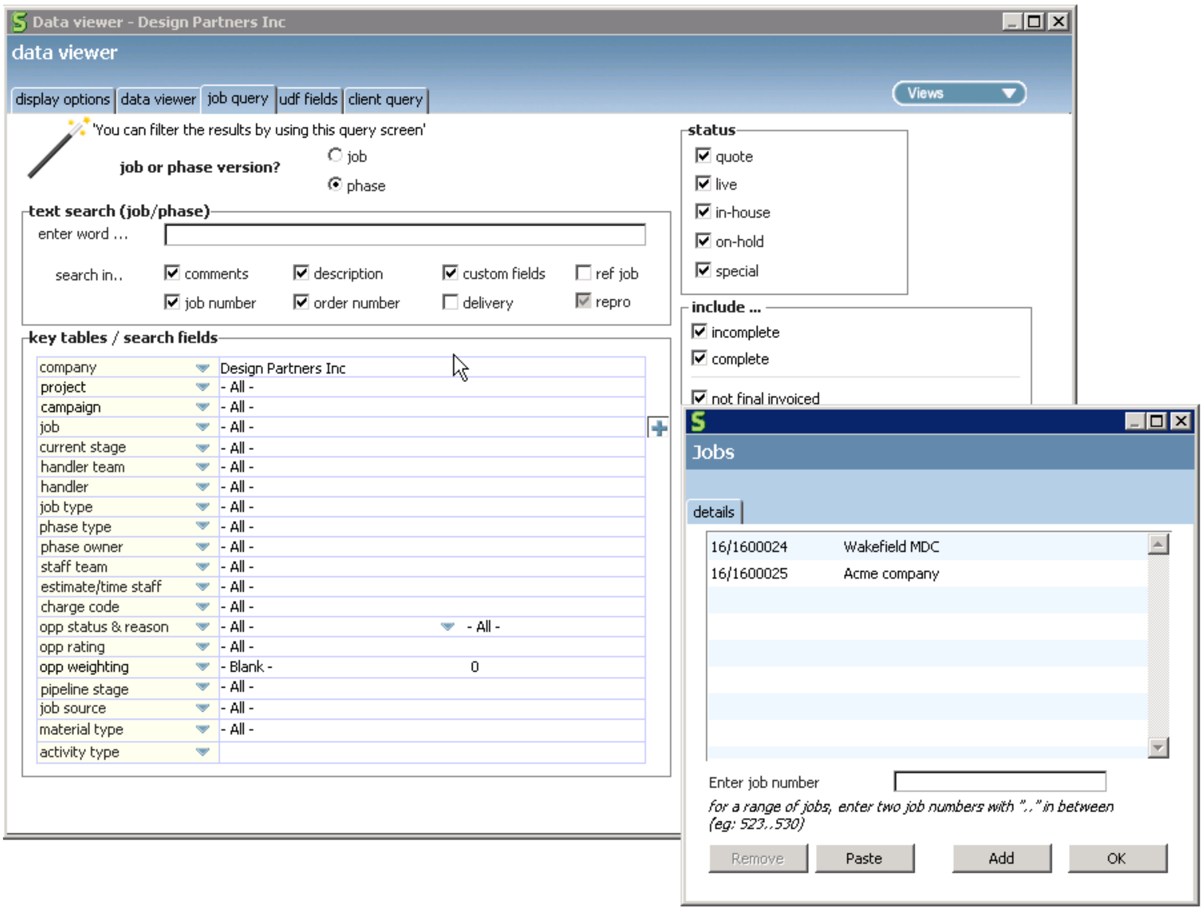
For more information on this feature please contact your project manager.

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

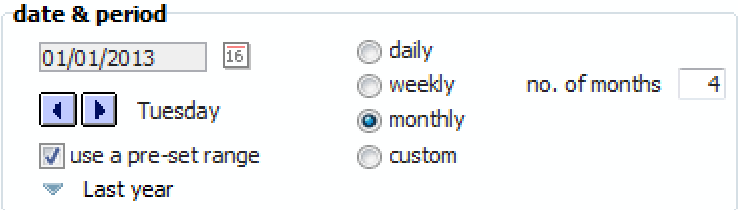
It is now possible to select a "pre-set date range" and use this when saving a data viewer view. This means scheduled Data Viewer reports can now have a dynamic date range.

Example of date ranges:

This month

Last month

Last year ... etc.



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.

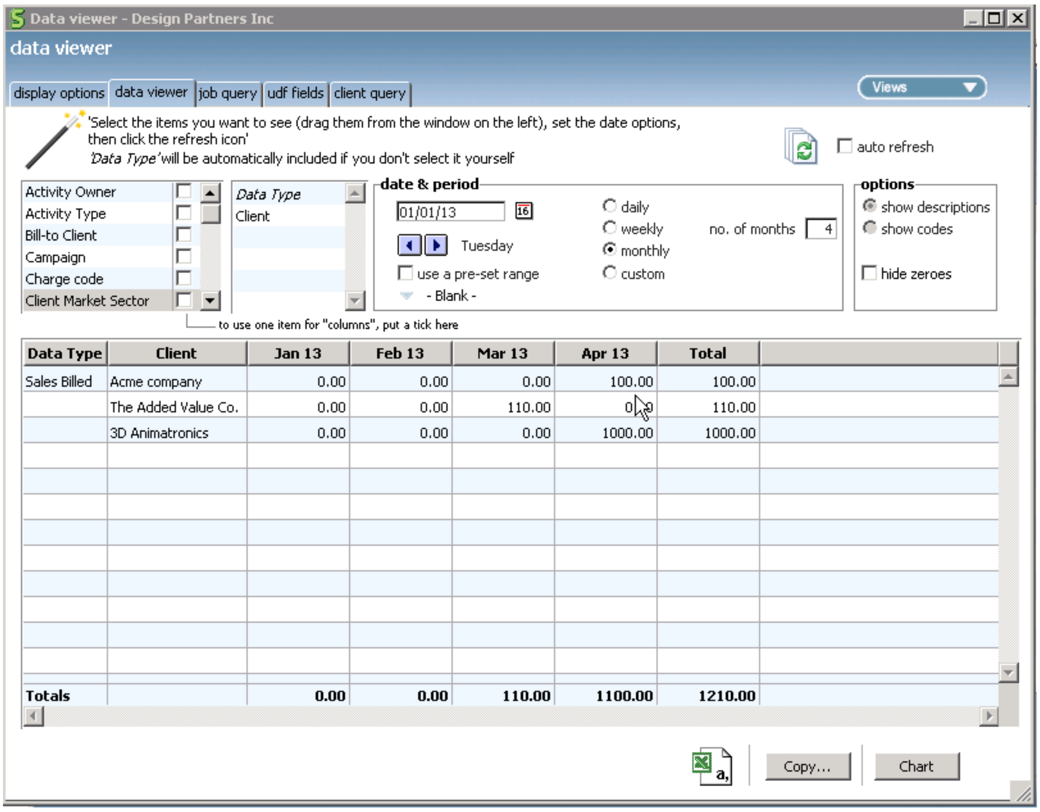
Data viewer - saved web reports & email alerts

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

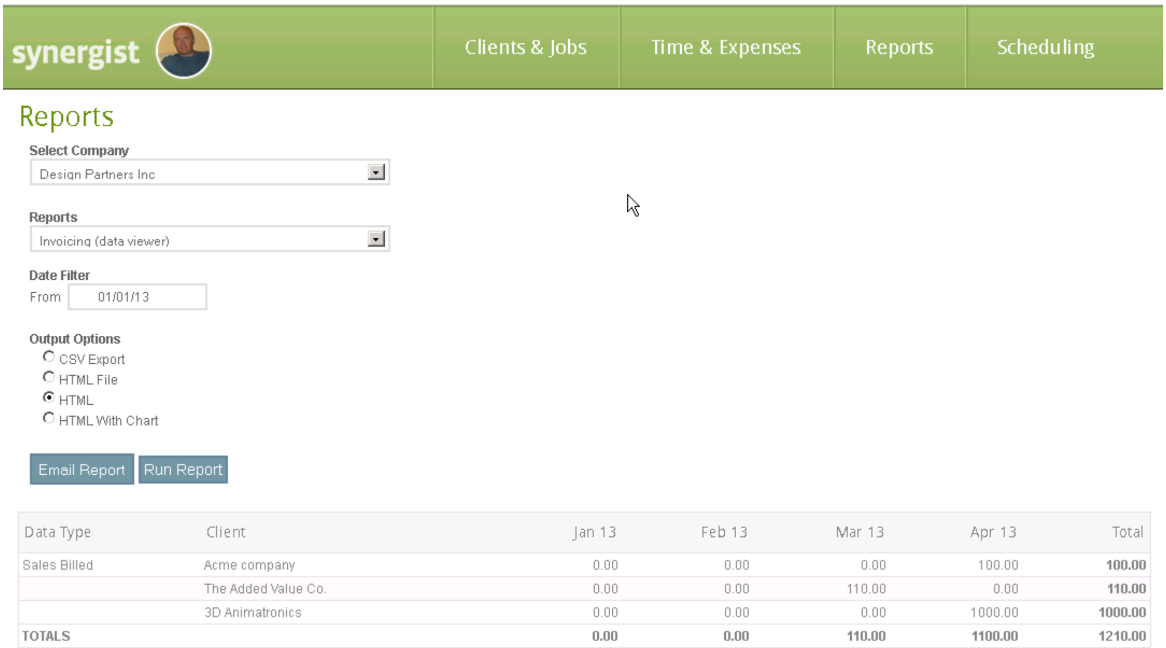
In this example this data viewer "view" has been created and saved. The user called the view "Invoicing (data viewer)"

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



Reports section of Staff Portal

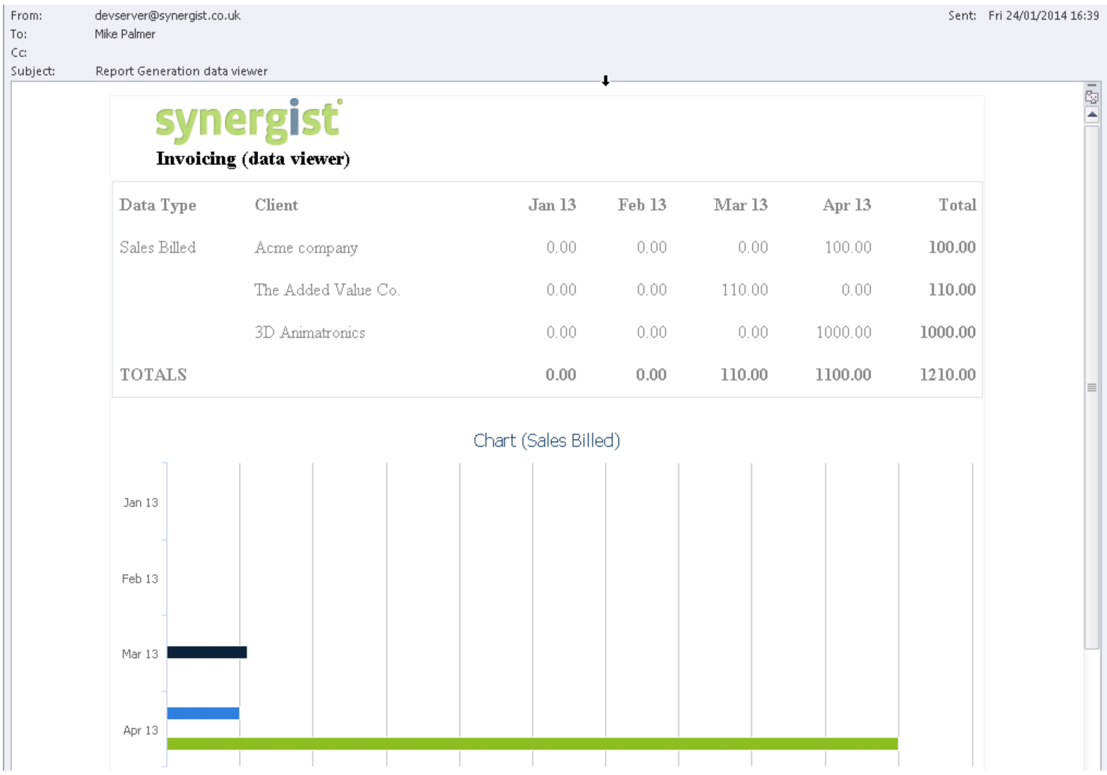
The report can be run and either saved to disc or output to the current web page (as per example below).



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).



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

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.

Batch update

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

Shortcut for adding a new line

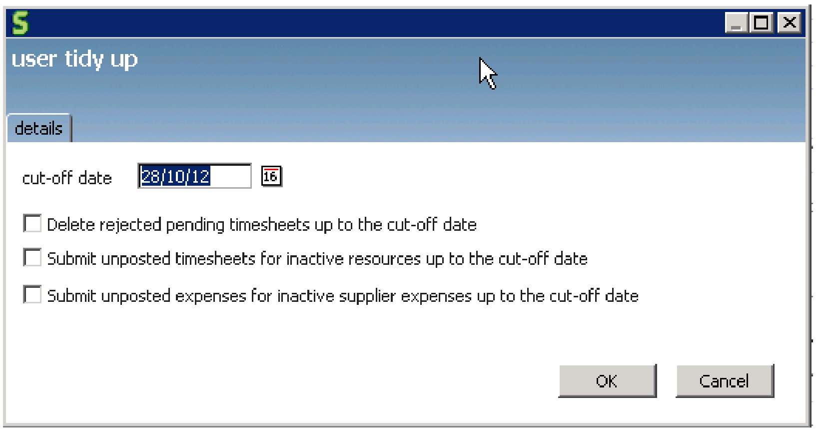
F3 has been assigned as a shortcut key for adding lines to:

- 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 though 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

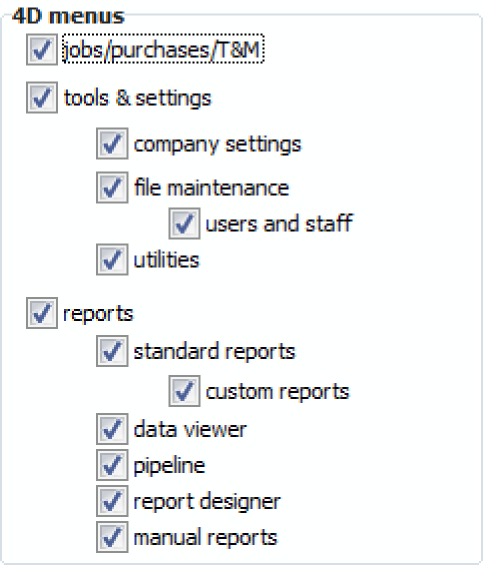
Synergist now supports SSL when accessing email (for email integration) via Pop3 & IMAP. This facilitates the use of cloud based email servers like Gmail.

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

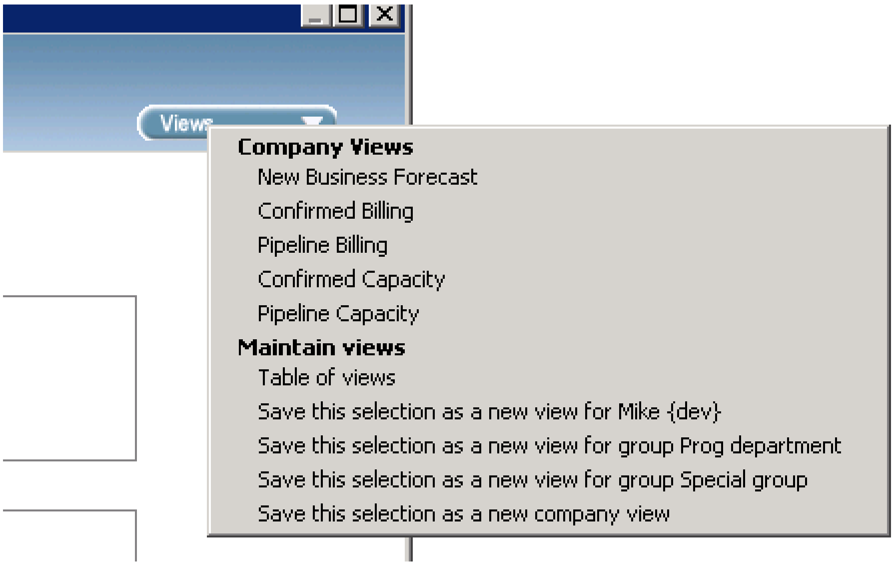
Charge codes

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

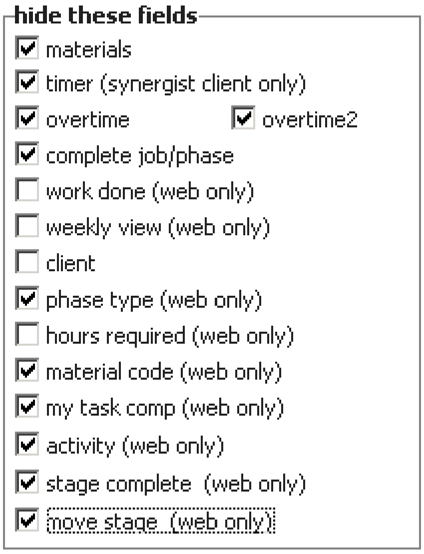
The red text in the transfer window 'only un-ticked costs are available for transfer' has been added back in for clarity. It had previously been removed

New-company defaults

Timesheet tab – company settings

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

These are the defaults…



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