

synergist[®]

Version 12.4 - Release Notes

Synergist Browser Interface

September 2019

Synergist v12.4 requires 4D Server v17

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

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OVERVIEW - V12.4 RELEASE

Synergist v12.4 includes enhancements to existing features, new areas of functionality and interface improvements, all designed to improve usability.

Major features in v12.4

Integrations

Cloud integration

New cloud integration includes:

- Attachment integration with G Suite and Office 365 via API link attachment types
- Email integration
- PDF attachments for web-based email systems

Multi-user experience

Improvements to the way Synergist handles updates

Improved methods of updating records enables users to simultaneously view and edit the same multi-tab records.

Billing plans

Multi-job billing plan feature

The new Job/phase list feature enables users to switch to a view displaying multiple billing plans over a number of months. Billing plans may be accessed from the client card, providing access to billing plans for a single client.

In-line billing plan edit feature

Billing plans have a new in-line editable view.

Quick billing plan feature

The Quick billing plan feature enables users to create billing plans for a job or phase. It has advanced features for determining the distribution of values across plans and for applying the synchronisation settings.

Estimating & Scheduling

Time & bookings

With this new view of estimates, users can create new estimates on the fly, amend current estimates with in-line editing and create calendar bookings against estimates. The new view provides a useful indication of the amount of time booked against an estimate and the time remaining.

Calendar bookings

Create bookings from loading view

Users can create and amend bookings whilst in the Calendar loading view.

Option to show activities in Calendar

Requisitions can now be used as work tickets and optionally displayed in the calendar. From within the calendar, work tickets may be reassigned, and their dates modified.

Features supporting consultancy retainers

When using a retainer model, it is often a requirement to create block bookings of hours per day-over long periods of time. The following features have been added to the Calendar bookings system to help support this way of working:

Monthly calendar view

Useful for booking and tracking bookings spanning several months.

Booking without time of day

Consultancies often book 'hours per day' rather than 'time of day' into calendars. If this way of working is preferred, it is now possible to hide the start and end times of a booking.

Custom labels

Certain field labels can be amended. For example, 'Handler' can become 'Project lead'.

Ability to timesheet a requisition

This feature is designed for companies who wish to assign work to staff without necessarily using estimates or creating calendar bookings. Requisitions can behave as work tickets, being assigned to a user and viewed on the Kanban board. The user can then create a timesheet directly from a requisition.

Spread loading calendar bookings

This feature allows the user to enter the 'total number of hours' and the 'hours per day'. As a result, it enables the system to find the 'end-date'.

Invoicing

ASBOF

Feature to deal with levies.

Reporting

Saved & Custom reports

The interface has been enhanced to handle reports saved at 'Company' and 'User' levels, and to filter 'Custom and saved reports'.

ACCOUNTS

Handling RR billed amount movements

Slight extension of nominal postings for handling RR billed amount movements

When creating RR (Revenue Recognition) or Write-off transactions, it was and still is possible to move billed amounts between jobs or phases of jobs. These movements could also give rise to a need for an equivalent movement of amounts between 'Sales nominal codes'. Previously, these transactions created postings that could not be transferred to the sales ledger of an accounting system because they weren't invoices or credit notes. The only option was to post a manual journal into the accounting system and delete these non-invoice/credit entries from the Synergist batch.

If the linked accounting system supports the automated posting of nominal journals, the new feature will turn these entries into nominal ledger entries rather than sales ledger entries.

PI option for export to Xero

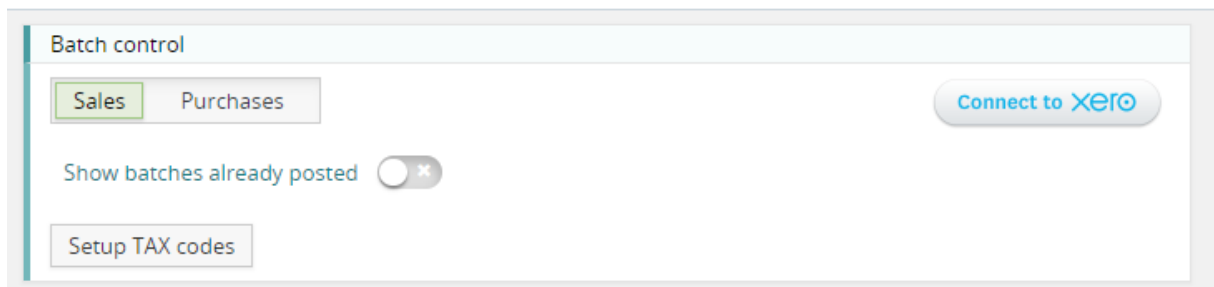
Purchase invoice export

Company setting added to include the job/phase number in the description for purchase export. The job phase number is prepended to the description when output to Xero.

Xero API - change to partner level App for cloud

Xero type

For cloud sites only, 'Partner' type has been added to the current 'Public' type, allowing a more permanent connection between Synergist and Xero, facilitating closer integration possibilities.



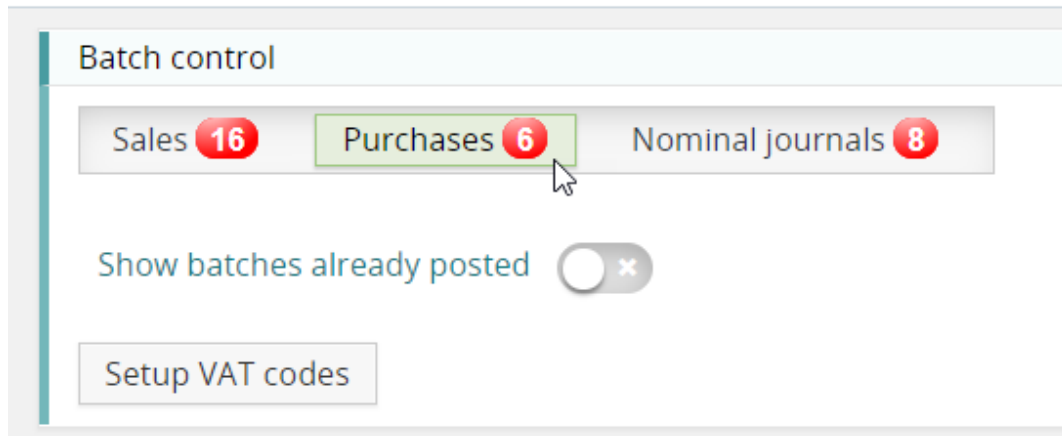
(ACCOUNTS CONTINUED ...)

Xero - Purchase import feature

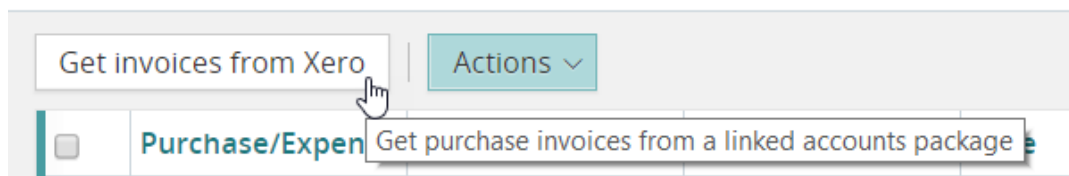
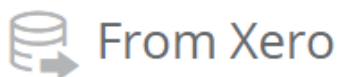
Xero users, using the Synergist cloud, can obtain a feed of purchase invoices into Xero from Receipt Bank, Data Molino etc. This new feature enables the data to be imported into Synergist via a link to their Xero system.

To access the link:

- Click the 'Accounts link' on the main menu. This link was previously called 'Accounts export'
- Select the 'Purchases' button



- Click 'Get invoices from Xero' to create a list of invoices for import



(ACCOUNTS CONTINUED ...)

List of invoices for importing

Invoices for importing are either 'Expenses' or 'Purchases'.

Get invoices from Xero		Actions								
<input type="checkbox"/>	Purchase/E...	Account	Name	Type	Date	Document	Reference	Net amount	Tax amount	Currency
<input type="checkbox"/>	Expense	1/AS11	Alan Shearer ...	ACCPAY	30/11/2006	1/5849		-£175.00	£175.00	GB Pounds
<input type="checkbox"/>	Expense	1/12	Helen White	ACCPAY	28/04/2009	1/9189	171	£146.58	£7.10	GB Pounds
<input type="checkbox"/>	Expense	1/12	Helen White	ACCPAY	30/04/2009	1/9190	177	£199.20	£0.00	GB Pounds
<input type="checkbox"/>	Expense	1/12	Helen White	ACCPAY	30/04/2009	1/9199	176	£50.00	£0.00	GB Pounds
<input type="checkbox"/>	Expense	1/12	Helen White	ACCPAY	05/05/2009	1/9191	179	£299.20	£0.00	GB Pounds
<input type="checkbox"/>	Expense	1/12	Helen White	ACCPAY	25/08/2009	1/9200	206	£191.91	£28.79	GB Pounds

Expenses

On clicking an expense, the expense lines appear below. These lines can be allocated to Synergist expense types.

<input type="checkbox"/>	Expense	1/12	Helen White	ACCPAY	25/08/2009	1/9200	206	£191.91	£28.79	GB Pounds
Description	Job Phase	Account code	Expense type	Tax type	Tax code	Net amount	Tax amount			
Electrical Work - bulb	Pick		Miscellaneous	SRINPUT	1 (UK 20%) Standard	£20.17	£3.03			
Hotel Expenses	Pick		Travel	SRINPUT	3 (UK 20% - INPUT2) Sp...	£39.57	£5.93			
Hotel Expenses	Pick		Travel	SRINPUT	3 (UK 20% - INPUT2) Sp...	£132.17	£19.83			

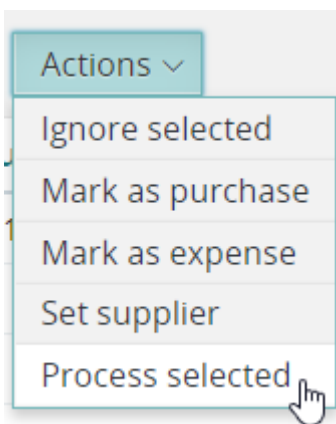
Purchases

On clicking a purchase invoice, the user has the opportunity to allocate the invoice to a 'Job Phase' and a 'Purchase Order'. Purchase orders must already exist in Synergist.

<input type="checkbox"/>	Purchase	1/A001	Able Printers ...	ACCPAY	02/05/2012	16/1600004	£50.00	£4.00	GB Pounds
Description	Job Phase	Purchase Order	Net amount	Tax amount					
n/a	Pick	Pick	£50.00	£4.00					

Processing

Once the records for importing have been correctly matched to expense types and purchase orders, the user selects the items for importing and clicks 'Process selected' from the 'Actions' button drop-down list.



ACTIVITIES


Activity details screen

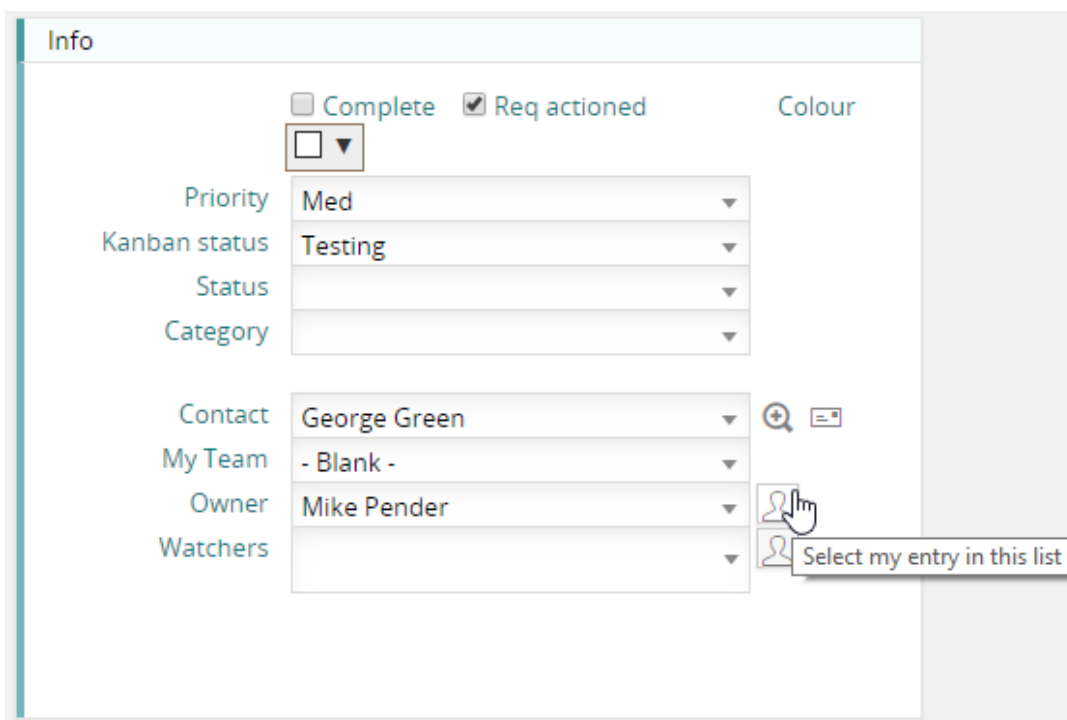
Amendments to the Activity > Details tab include:

- A new shortcut to set the 'Owner' of an activity
- A new field name 'Watchers' replacing the field name 'Others'
- Alerts set by 'Start' date

Shortcut to set the 'Owner' of an activity

A shortcut has been provided to set the current user as the 'Owner' of the current activity.

This is done by clicking the  button to the right of the 'Owner' field. If the activity record is a requisition, a second click sets the owner to the preferred person specified in the requisition section. A third click un-assigns the owner. Users may wish to leave the activity unassigned if their policy is to allow users to self-select requisitions as work tickets.

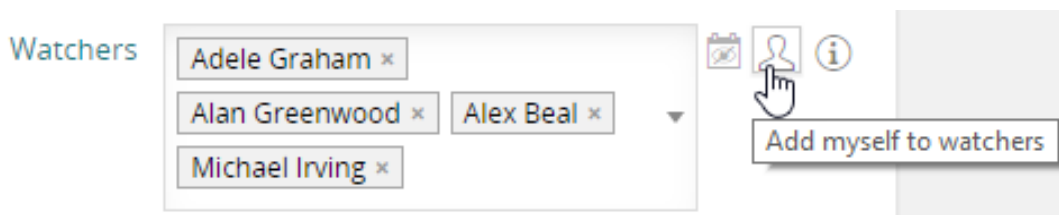


Field label 'Watchers' replaces field label 'Others'

The field label change makes the use of this feature clearer when activities are viewed in Kanban boards.

Button to add/remove the current user in the Watcher's list

To add/remove other 'Watchers' in the list, use the drop-down menu and manually select/deselect their names from the list.

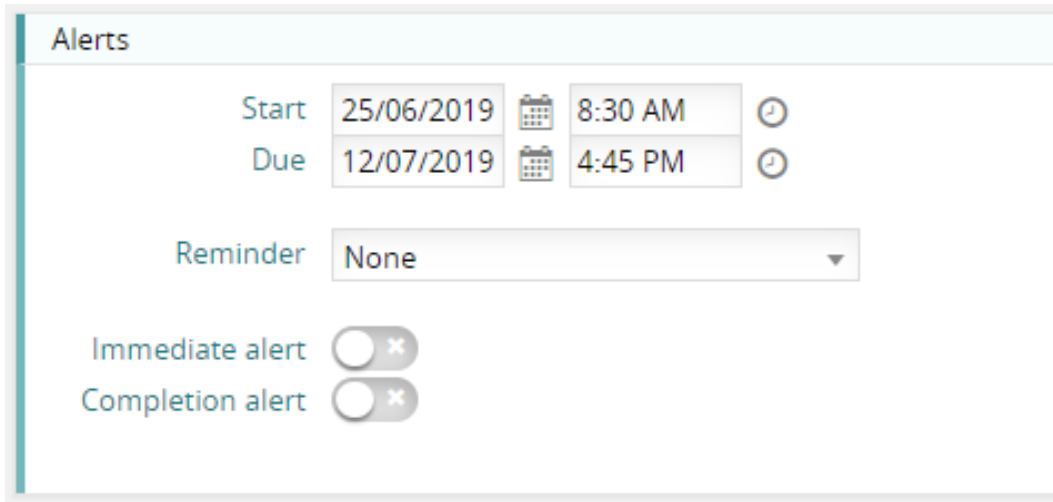


(ACTIVITIES CONTINUED ...)

Alert - Start date and time

Alerts used to be only set by 'Due' date, but now they can be set by the new 'Start' date field, too.

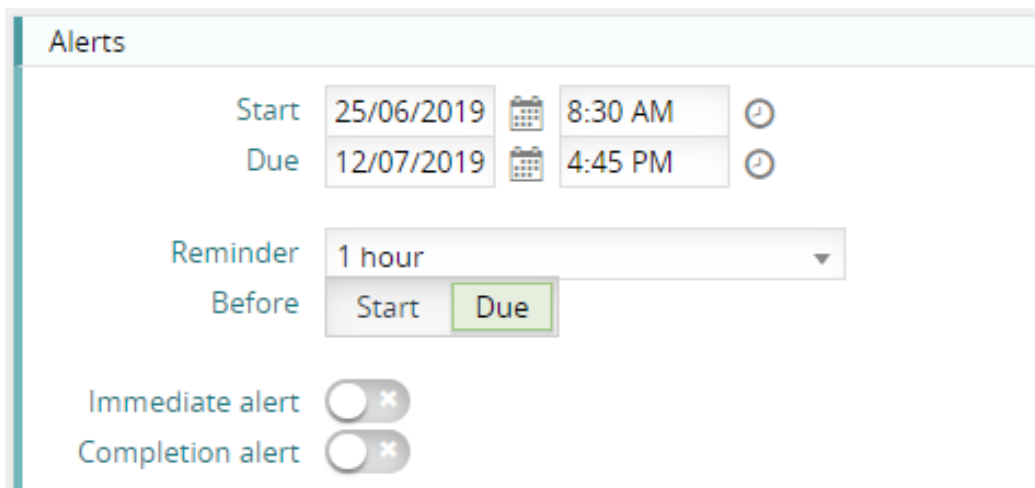
The 'Reminder' field co-ordinates when a reminder is to be sent. The default setting is set to 'None' with no reminder being sent.



The screenshot shows the 'Alerts' configuration panel. It features a 'Start' field with a date of 25/06/2019 and a time of 8:30 AM, and a 'Due' field with a date of 12/07/2019 and a time of 4:45 PM. Below these is a 'Reminder' dropdown menu set to 'None'. At the bottom, there are two toggle switches: 'Immediate alert' and 'Completion alert', both of which are currently turned off.

If the 'Reminder' is set to a value, for example 1 hour, 'Start' and 'Due' buttons appear. The buttons give the option of being reminded by 'Start' or 'Due' date/time.

In the example below, an alert will be sent 1 hour before the 'Due' date/time.



This screenshot shows the 'Alerts' configuration panel with the 'Reminder' dropdown set to '1 hour'. Below the dropdown, there are two buttons: 'Start' and 'Due'. The 'Due' button is highlighted with a green border, indicating it is the selected option for the reminder. The 'Start' and 'Due' date/time fields remain the same as in the previous screenshot. The 'Immediate alert' and 'Completion alert' toggle switches are still turned off.

The 'Immediate alert' and 'Completion alert' functions remain unaffected.

(ACTIVITIES CONTINUED ...)

New fields on Activity – Start date and start time

These new fields enable activities to be used in a wider range of circumstances. Requisitions can become work tickets with the option of appearing in user's calendars and Kanban boards.

Defaults for these new fields

New activity

Due date = today
Due time = 10:00
Start date = today
Start time = 9am

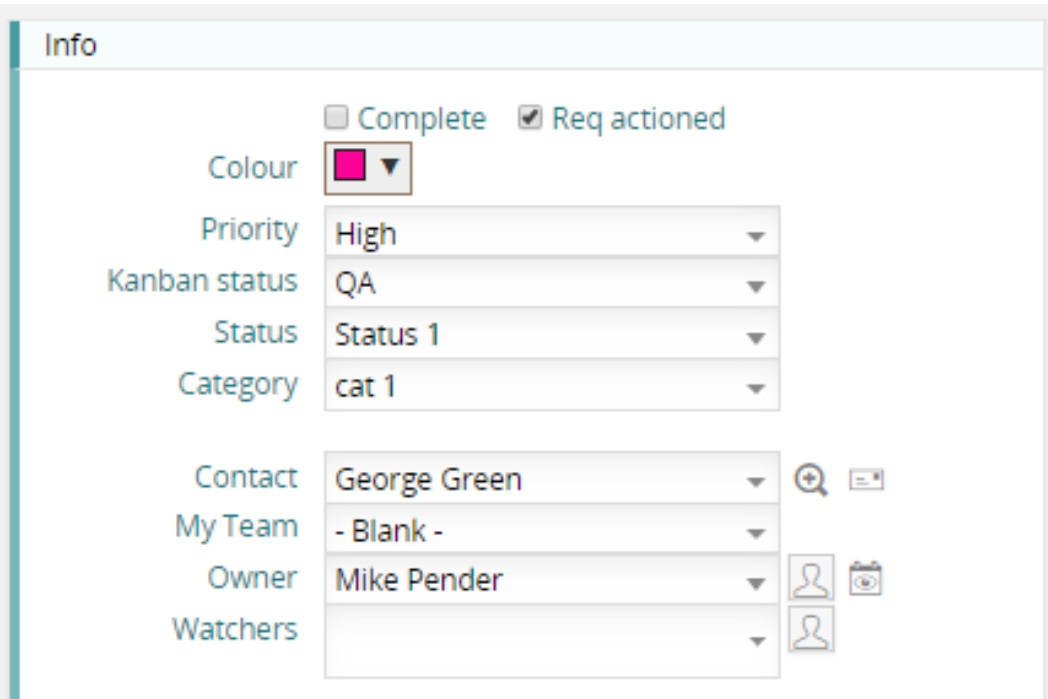
Existing activities

Start date = due date
Start time = due time - 1

Activities can be assigned a colour

This new colour field is used to colour activities when they appear in calendars.

Activity card



The screenshot shows an 'Info' panel for an activity card. At the top, there are two checkboxes: 'Complete' (unchecked) and 'Req actioned' (checked). Below this are several fields:

- Colour:** A dropdown menu with a pink color swatch and a downward arrow.
- Priority:** A dropdown menu with 'High' selected.
- Kanban status:** A dropdown menu with 'QA' selected.
- Status:** A dropdown menu with 'Status 1' selected.
- Category:** A dropdown menu with 'cat 1' selected.
- Contact:** A dropdown menu with 'George Green' selected, accompanied by a magnifying glass icon and a calendar icon.
- My Team:** A dropdown menu with '- Blank -' selected.
- Owner:** A dropdown menu with 'Mike Pender' selected, accompanied by a person icon and a calendar icon.
- Watchers:** A dropdown menu with a person icon next to it.

(ACTIVITIES CONTINUED ...)

Activity list filter – Job and phase additional filters

To help filter the activity list, particularly when viewing in Kanban mode, 'Job level' and 'Phase level' filters have been added to the 'List filter'.

For example, the user may want to filter the Kanban board to only show requisitions for jobs of a specific handler.

To access the 'List filter' and to view the additional filters:

- Navigate to the 'Activities list'
- Click the 'Filter' button
- Select 'Job & Phase'

The screenshot shows the 'List filter' interface. At the top, there is a teal header with 'Activities list' and a search icon. Below this is a 'List filter' section with a 'Query' area containing a 'Search for' input field, a 'Search in' dropdown menu (showing '6 items selected'), and a 'Filter by date' checkbox. Below the query area is a 'More filters' section with a 'Show inactive options' checkbox and three expandable filter categories: 'Company', 'Client', and 'Job & Phase'. The 'Job & Phase' filter is expanded, showing 'Job' and 'Phase' fields with search icons. Below this is an 'Additional filters' section with radio buttons for 'Job level', 'Phase level', and 'None'.

(ACTIVITIES CONTINUED ...)

Selecting either 'Job level' or 'Phase level' opens the drop-down menu of additional filters.

The screenshot shows a filter configuration interface with the following sections:

- Additional filters:** Job level Phase level None
- Job / Phase status:** Quote Live In-house On hold Special
- Invoicing status:** Not final invoiced Final invoiced
- Completion status:** Uncompleted Completed
- Templates:** Normal Jobs Template Jobs

Below these sections are two dropdown menus:

- Team:** A dropdown menu with a small icon to its right.
- Handler:** A dropdown menu with a small icon to its right.

Complete the necessary fields and click the 'Apply filter' button before exiting.

Ability to timesheet a requisition

This feature is designed for companies who wish to assign work to staff without necessarily using estimates or creating calendar bookings. Requisitions can now be assigned to a user and viewed on the Kanban board. These same requisitions can also be pulled into the calendars based on the start and end dates of the requisitions.

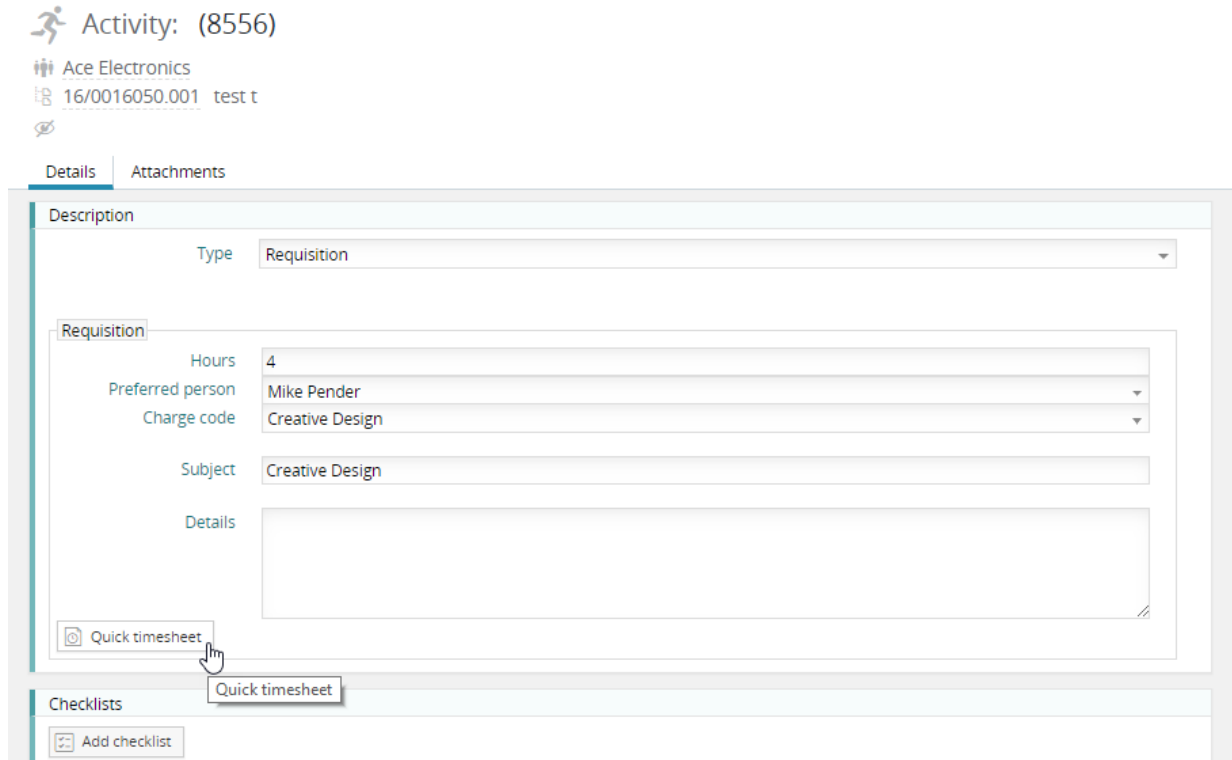
If deciding to use this new method of assigning work, companies might wish to encourage users to post timesheets directly from requisitions. In this workflow model, requisitions would be raised by account handlers with realistic start and due dates. These requisitions would then either be assigned to staff (via the 'Owner' field on the requisition) or by users self-selecting the requisition from a list of unassigned requisitions.

(ACTIVITIES CONTINUED ...)

To create a 'Quick timesheet' through an activity:

- Select 'Activities' in the main menu
- Open an activity from the Activity list or the Kanban view

The 'Quick timesheet' button displays if the activity 'Type' is set to 'Requisition' and the activity is linked to a job or a job phase. Click the 'Quick timesheet' button to create a timesheet.

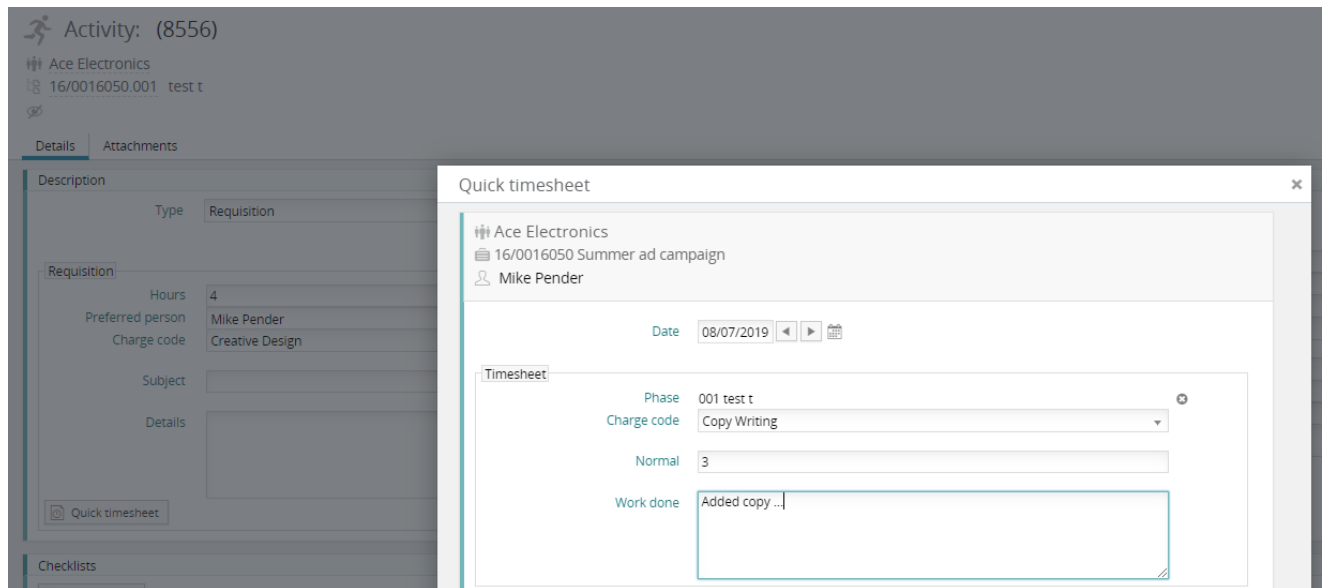


(ACTIVITIES CONTINUED ...)

Creating a timesheet

If the user is the owner of an activity, they can create a timesheet by clicking the 'Quick timesheet' button.

Please note that the user does not have to select the same charge code as the requisition or the same number of hours. Neither does the 'preferred person' need to be the person creating the timesheet. In Synergist requisitions, the specified number of hours, charge code and preferred person are suggestions from the creator of the requisition. The actual work allocated or performed may end up being something different to the initial requisition's suggestion. It's designed this way to keep the requisition process as flexible as possible.



(ACTIVITIES CONTINUED ...)

Timesheets tab on activity record

The 'Timesheet' tab displays in an 'Activity' when either pending or real timesheets have been booked against an activity. If there are no timesheets booked, then the 'Timesheets' tab won't display. The 'Timesheets' tab displays two separate read-only tables for pending and real timesheets.

Details	Attachments	Timesheets	
Pending time			
Staff	Charge code	Date	
Phil Rawson	Artwork hours	18/07/2018	
TOTAL			
Timesheets			
Staff	Charge code	Date	Daytime
Alan Greenwood	test charge code	24/09/2018	1
TOTAL			1

Activity priority column - Colour coding

To enhance the 'Priority' column in the Activity list, the text has been colour coded:

- High Priority - Red
- Medium Priority - Amber
- Low Priority - Green

Priority
High
Med
Low

This colour coding feature is present in both 'List' and 'Kanban' modes.

(ACTIVITIES CONTINUED ...)

Activity checklist enhancements

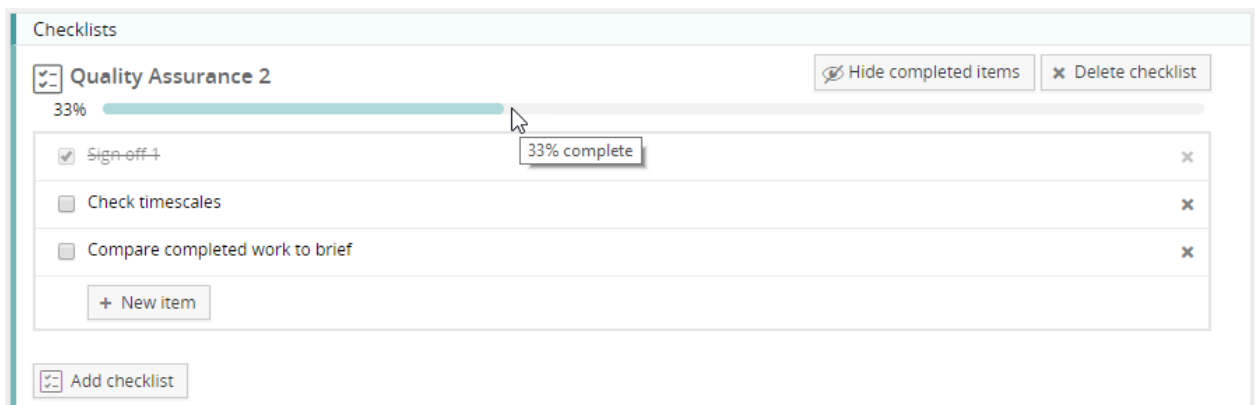
Progress bar on 'Activity' checklists

Progress bars have been introduced to help communicate progress and completion of Activity Checklists.

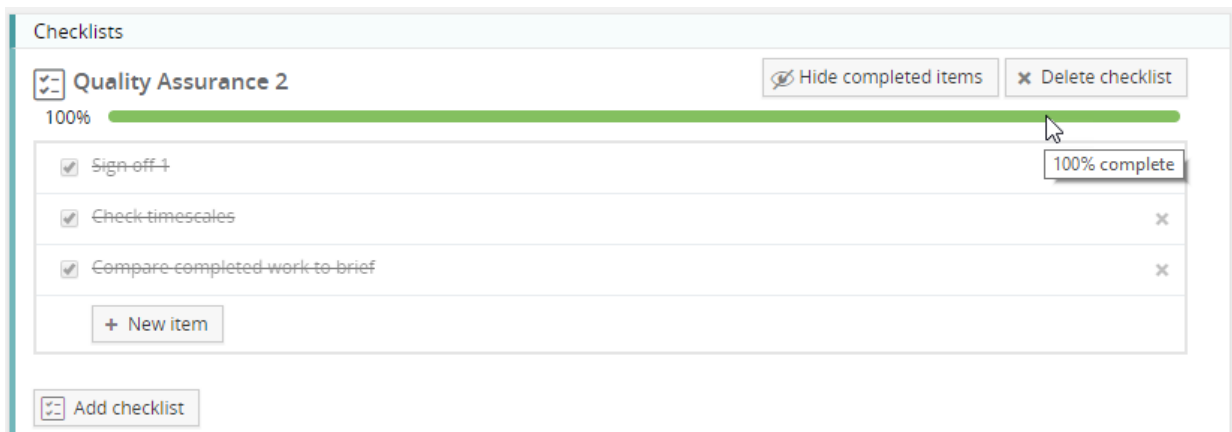
To access this feature:

- Select 'Activities' in the main menu
- Open an activity in the 'Activities list'
- Click the 'Details' tab
- Locate the 'Checklists' panel

When items in a checklist are ticked off, the progress bar displays the percentage of completed items.



When the checklist is completed, the colour of the bar changes from cyan to green.

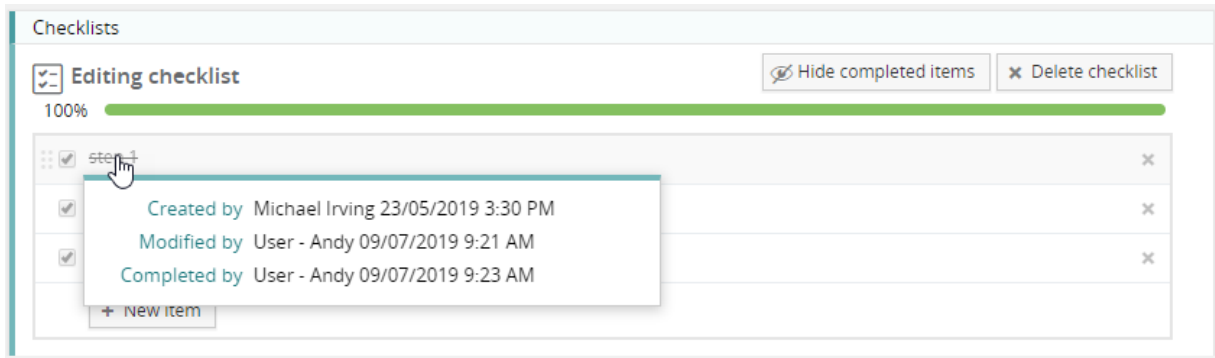


(ACTIVITIES CONTINUED ...)

Activity checklist pop-up information

An enhancement to the 'Activities Checklist' includes pop-up text displaying the following information:

- Created by (Name, Date, Time)
- Modified by (Name, Date, Time)
- Completed by (Name, Date, Time)



The screenshot shows a 'Checklists' window with a progress bar at 100%. A pop-up window is open over a checklist item, displaying the following information:

- Created by Michael Irving 23/05/2019 3:30 PM
- Modified by User - Andy 09/07/2019 9:21 AM
- Completed by User - Andy 09/07/2019 9:23 AM

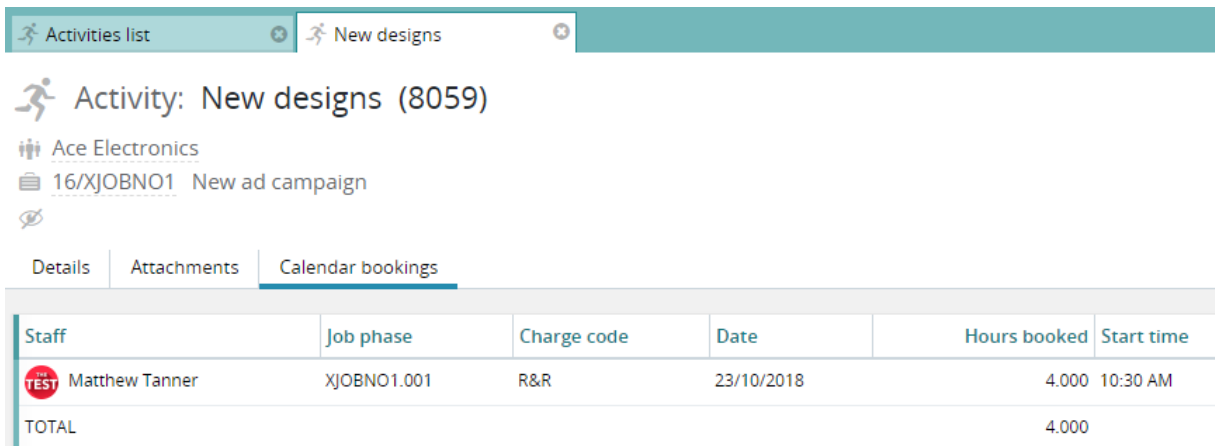
Buttons for 'Hide completed items' and 'Delete checklist' are visible in the top right. A '+ New item' button is at the bottom left of the checklist area.

Calendar bookings tab added to an activity

If using requisitions, it is useful to be able to see all the bookings that have been generated from a requisition.

To access the 'Calendar bookings' tab:


- Select 'Activities' from the main menu
- Open an activity (typically a requisition) in the list
- Click the 'Calendar bookings' tab



The screenshot shows the 'Activities list' with 'New designs' selected. The activity details are:

- Activity: New designs (8059)
- Ace Electronics
- 16/XJOBNO1 New ad campaign

The 'Calendar bookings' tab is active, showing a table of bookings:

Staff	Job phase	Charge code	Date	Hours booked	Start time
 Matthew Tanner	XJOBNO1.001	R&R	23/10/2018	4.000	10:30 AM
TOTAL				4.000	

(ACTIVITIES CONTINUED ...)

Batch create activities

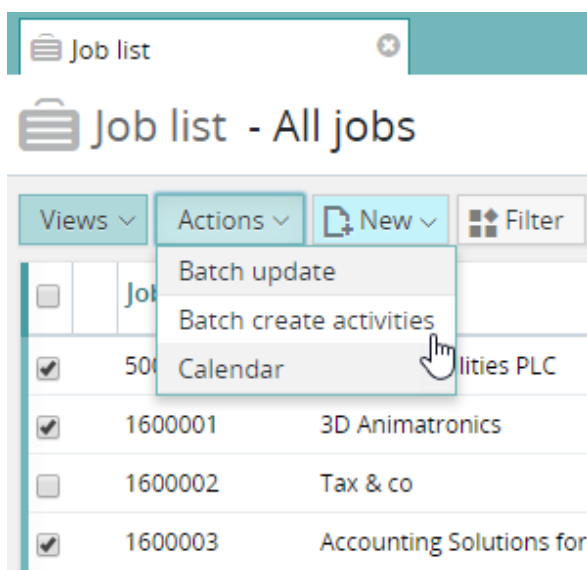
The 'Batch create activities' function creates multiple activities for:

- Clients
- Contacts
- Jobs
- Phases
- Opportunities

From any of the above sections:

- Use the tick boxes to select one or more items in the list
- Click the 'Actions' button
- Choose the 'Batch create activities' option

In the following example, 'Batch create activities' has been accessed via the 'Job list'.



(ACTIVITIES CONTINUED ...)

Batch create activities screen

The title of the window indicates how many items have been selected. Complete the fields in the pop-up window and then click 'Create activity' to finalise the action.

Batch create activities - Create activities for the 6 selected jobs ✕

Description		Allocation	
Title	Agenda	<input type="radio"/> Allocate to	
Type	Draft docs	<input checked="" type="radio"/> Allocate to related handler	
		Due	
		00/00/00	00:00:00

Description of fields:

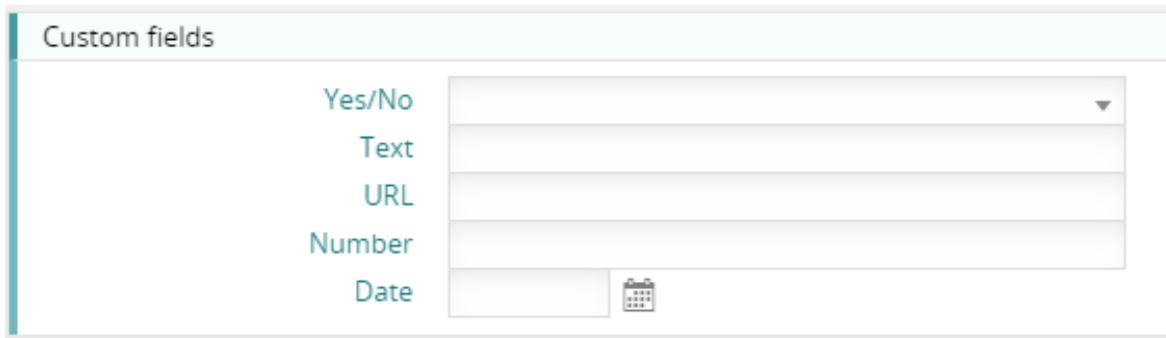
- **Title**
Common description for all the activities about to be created
- **Type**
Select an activity type
- **Allocate to**
Select the owner of the activities from the drop-down menu. If set to '-Blank-', the current user becomes the owner
- **Allocate to related handler**
Sets the related handler as the owner of the activities
- **Due date/time**
If not set, they default to the current date and 8:00AM

(ACTIVITIES CONTINUED ...)

Batch updates

URL custom field in activity 'Batch update'

The 'Custom fields' panel on the right-hand side of the 'Activities batch process' window now supports URL field types.



Custom fields

Yes/No	<input type="text"/>
Text	<input type="text"/>
URL	<input type="text"/>
Number	<input type="text"/>
Date	<input type="text"/>

Boolean (Yes/No) fields supported in Batch updates

The 'Client list' and 'Client contact list' support Boolean (Yes/No) fields for Batch updates.

Batch updates in these areas now support the following custom field types:

- Boolean (Yes/No)
- Text
- URL
- Number
- Date

(ACTIVITIES CONTINUED ...)

Mark as complete - Activity batch update

Previously, there were only two tick boxes in the 'Activities batch process' pop-up window:

- Mark as complete
- Mark as incomplete

A third tick box, '**Mark as complete if Job/Phase is complete**', has been added for batch processing. Clicking this box also sets the Kanban status to 'Done'.

This is as useful feature for completing any activities left open after their related jobs have been completed.

The screenshot shows the 'Activities batch process' form. The 'Data' section contains the following elements:

- Text: "To change any of the following select a new value below. Any values that are left blank will be left unchanged."
- Three checkboxes: Mark as complete, Mark as incomplete, and Mark as complete if Job/Phase is complete.
- Three dropdown menus: Activity type, Owner, and Kanban status (set to 'Done').

Start date and time - Activity batch update

To change the date, click the calendar icon. 📅

To change the time, click the clock icon. 🕒

The screenshot shows the 'Activities batch process' form with a calendar and time picker open. The 'Data' section contains the following elements:

- Text: "To change any of the following select a new value below. Any values that are left blank will be left unchanged."
- Three checkboxes: Mark as complete, Mark as incomplete, and Mark as complete if Job/Phase is complete.
- Three dropdown menus: Activity type, Owner, and Kanban status.
- Start date: 25/07/2019 (with calendar icon) and time: 10:30 AM (with clock icon).
- Due date: 14/08/2019 (with calendar icon) and time: 4:30 PM (with clock icon).
- Calendar: A calendar for August 2019 is open, showing dates from 1 to 31. The date 14 is highlighted.
- Display in calendar options: Set for owner, Unset for owner, Set for secondary owners, and Unset for secondary owners.

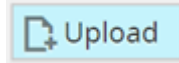
Options for attaching documents

Synergist provides several ways to attach documents, with each method having its own button.



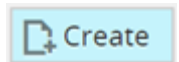
Uploaded attachment

Users can browse their local machine and shared drives, attaching documents and files. The attachments cannot be opened directly in Synergist. The files need to be downloaded and then opened or viewed externally to Synergist.



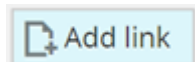
Synergist document

These documents are special HTML files that may be created by the user or generated from templates. The documents can be opened or viewed in Synergist but cannot be downloaded in their raw format. To send a Synergist document to a colleague or client, download a PDF version of the document and then send the PDF.



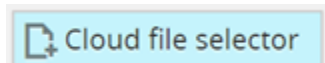
Link

A new feature enabling a user to create a special type of attachment that is essentially a hyperlink to any resource on the web.



Cloud

A new feature enabling users to attach and open files stored on cloud servers similar to Google Drive and Microsoft OneDrive. See below for more information on this type of attachment.



Note: The cloud icon will reflect the cloud system where the document resides. In this example it is OneDrive.

(ATTACHMENTS CONTINUED ...)

Attachment tabs

Attachments are listed under the 'Attachment' tab in the following areas of the program:

- Client
- Client contact
- Job
- Phase
- Opportunity
- Activity
- Supplier

Example of the 'Attachment' tab on a job

In this example, there is one attachment of each type as described above.

The screenshot shows a software interface for a job titled "Re-branding project" under the "Job" category. The user is logged in as "Wakefield MDC". The interface has a navigation menu with tabs: Details, Dashboard, Invoices, Billing plan, Phases, Estimate, Phase quotes, Activities, Requisitions, Attachments (selected), and Sc. Below the navigation menu is a toolbar with buttons: Upload, Create, Add link, Cloud file selector, Delete, and Filter. The main content area is a table of attachments with the following columns: Attachment name, Created, By, Type, and Folder/Activity. The table contains four rows of attachments, all created by Mike Pender. The first row is "voice commands.xlsx" (Document Folder, created 05/08/2019). The second row is "Synergist website" (Document Folder, created 05/08/2019). The third row is "Developer Tools - for support.docx" (Document Folder, created 05/08/2019). The fourth row is "Client letter" (Document Folder, created 19/07/2019). At the bottom of the table, there is a "Rows per page" dropdown set to 16 and a page indicator "1-4 of 4".

Attachment name	Created	By	Type	Folder/Activity
<input type="checkbox"/> voice commands.xlsx	05/08/2019	Mike Pender		Document Folder
<input type="checkbox"/> Synergist website	05/08/2019	Mike Pender		Document Folder
<input type="checkbox"/> Developer Tools - for support.docx	05/08/2019	Mike Pender		Document Folder
<input type="checkbox"/> Client letter	19/07/2019	Mike Pender		Document Folder

(ATTACHMENTS CONTINUED ...)

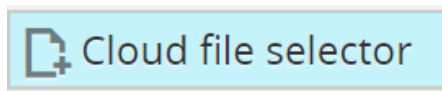
Cloud attachments

In order to attach a document stored in the cloud, the user must first have one or more cloud provider accounts. There is no restriction to a single cloud solution – cloud accounts can be mixed and matched. For example, a user may have accounts for Google Drive / G-suit and Microsoft OneDrive / Office 365. Documents can be attached from both sources in the same list of attachments. When clicked on, these attachments are opened by the cloud provider using the appropriate application (e.g. Word / Google Docs / Excel / Google Sheets).

Note: Only files in shared areas of the cloud should be attached to Synergist because if a user attaches a file that only they have access to, other users will not be able to open the document.

Attaching a cloud document

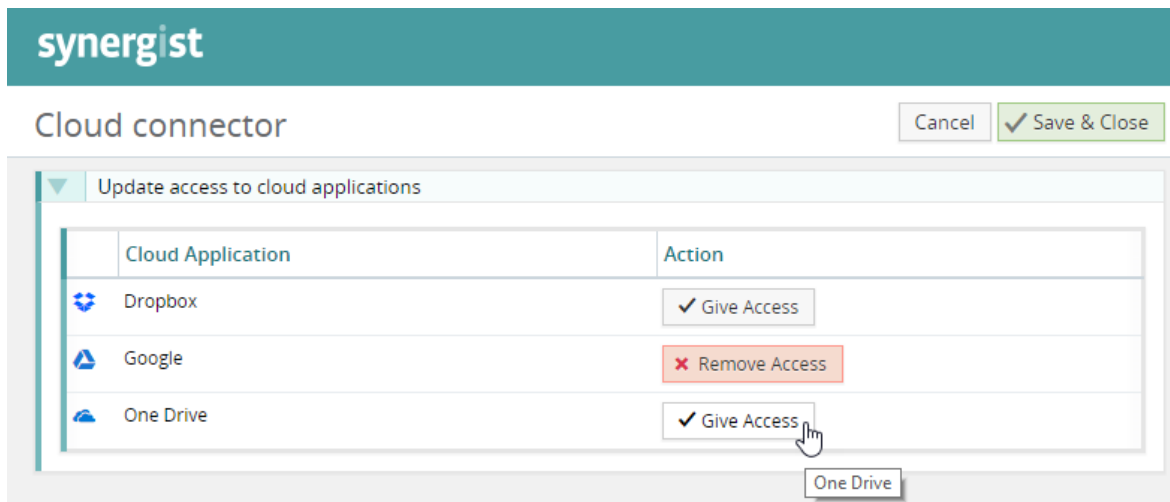
To attach a cloud file document, first click the 'Cloud file selector' button.



This opens a new browser window over the Synergist application. From here, the user has access to the cloud apps created by Synergist to enable connectivity between Synergist and cloud platforms.

Initial use

Users who have never granted cloud access to Synergist will need to provide authorisation. In the following example, the user is granting access for OneDrive.



Cloud provider

On clicking the 'Give Access' button, the user is re-directed to the cloud provider to log in and asked to grant access to the Synergist cloud app. Granting access rights to Synergist only needs to be done once.



Sign in

user@synergist.co.uk

No account? [Create one!](#)

[Can't access your account?](#)

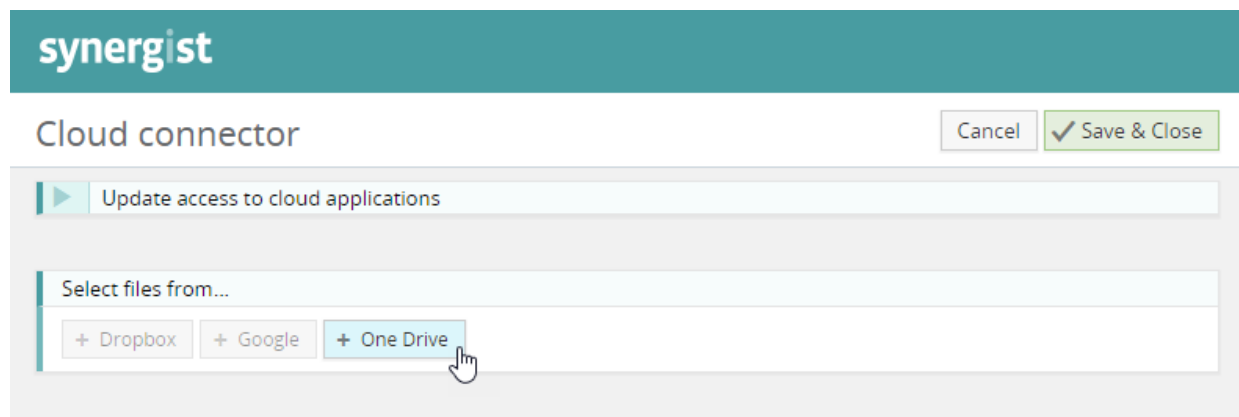
[Sign-in options](#)



Selecting files to attach

Once a user has given access rights to Synergist, they can select files from the cloud provider and attach documents to Synergist.

To start this process, click the button...

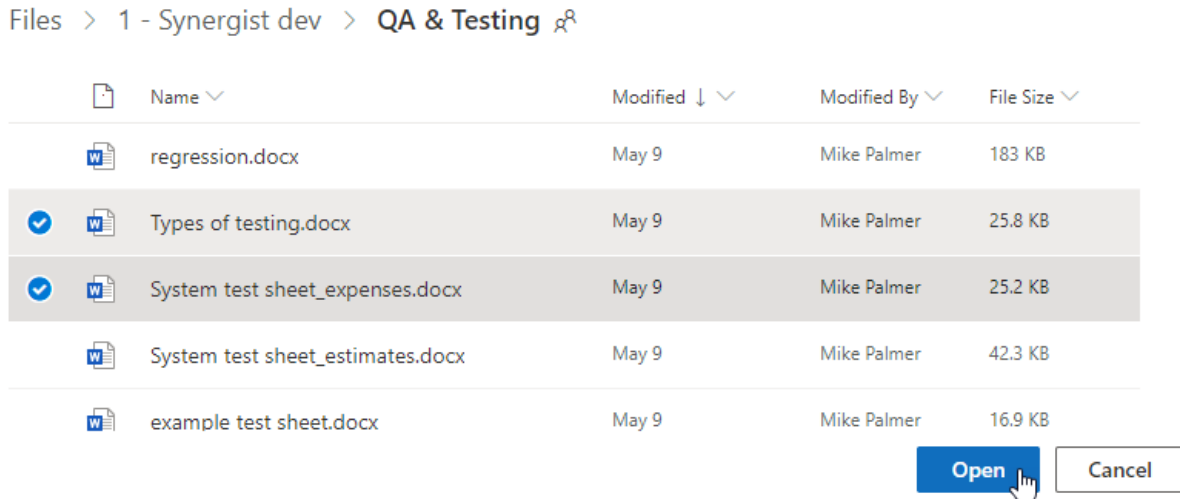


(ATTACHMENTS CONTINUED ...)

Example – Microsoft OneDrive file picker

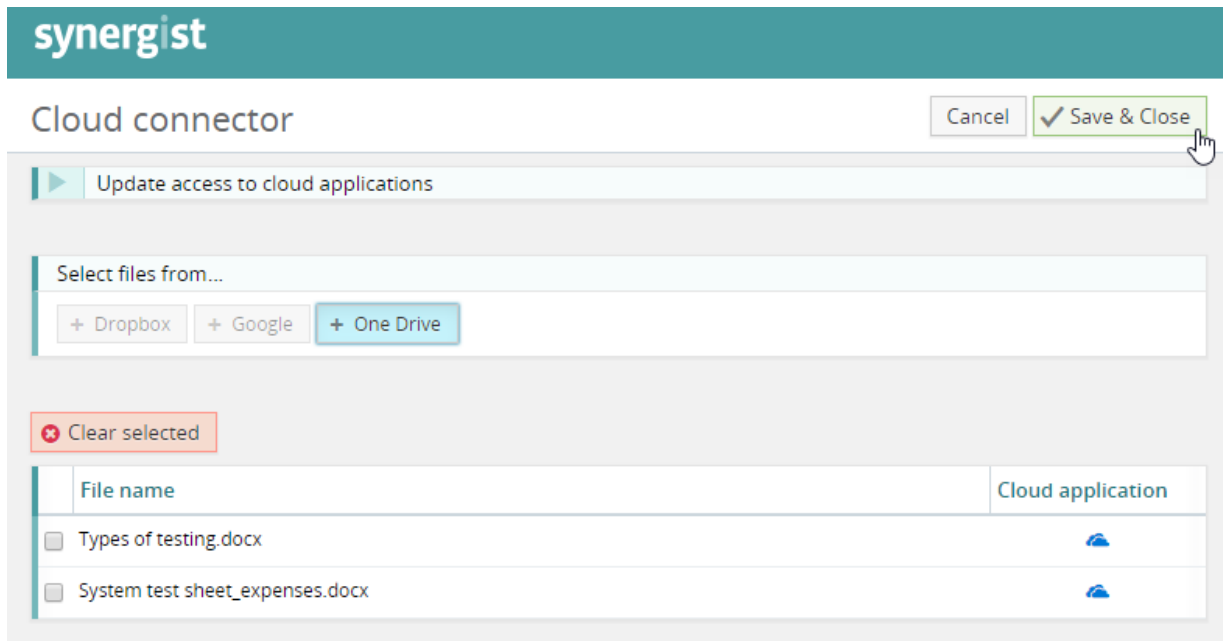
When the cloud provider’s file picker opens, users typically navigate to a shared area in their cloud storage. Please remember that if an attached file is personal and can only be viewed by the user, other users won’t be able to open it within Synergist.

Multiple files can be selected if the provider’s file picker allows this feature.



Checking the files before uploading

On selecting 'Open', the file picker disappears and a list of files is displayed. Confirmation is necessary to upload the files as attachments to Synergist.



(ATTACHMENTS CONTINUED ...)

Uploading the attachments

On clicking 'Save & Close', the browser window closes and the list of attachments is viewable. The spinning 'S' icon displays for a few seconds while the documents are added to the attachments list in Synergist.

Attachment name	Created	By	Type	Folder/Activity
<input type="checkbox"/> System test sheet_expe...	05/08/2019	Mike Pender		Document Folder
<input type="checkbox"/> Types of testing.docx	05/08/2019	Mike Pender		Document Folder

Opening a cloud document

To open a cloud document, click on the attachment and the document opens in its web application. In most cloud applications, multiple users can simultaneously edit the same document.

System test sheet

General description of mod
General system test

Main aim of these tests
Find any broken functionality that may have occurred inadvertently during system development

Note: Cloud attachments are not stored in Synergist. Synergist simply has a link to the original document. If an attachment is deleted in Synergist, the document still exists in the cloud. However, if an attachment is deleted in the cloud, the link will be broken and it will not be possible to open the document from within Synergist.

(ATTACHMENTS CONTINUED ...)

Synergist documents

Synergist documents can be accessed via the 'Attachments' tab within Clients/Jobs/Phases/Activities etc. Various enhancements have been added to Synergist documents in this release.

	Attachment name	Created
<input type="checkbox"/>	Spec Document	05/07/2019
<input type="checkbox"/>	Briefing	28/11/2018
<input type="checkbox"/>	Review and scoping	28/11/2018
<input type="checkbox"/>	Basic estimate	25/10/2018

Emoji's

Greater support provided for the use of emoji icons and tables.

Page breaks

Page breaks can now be embedded in Synergist documents.

Synergist Document: Client letter PDF Cancel Save & Close

Details

Document name* Client letter

Template

[clientAddress]

Our ref: [clientCode]

Dear [clientcontactSalutation] ,

Kind regards,

[userFullName]

[userRoleDescription]

- page break -

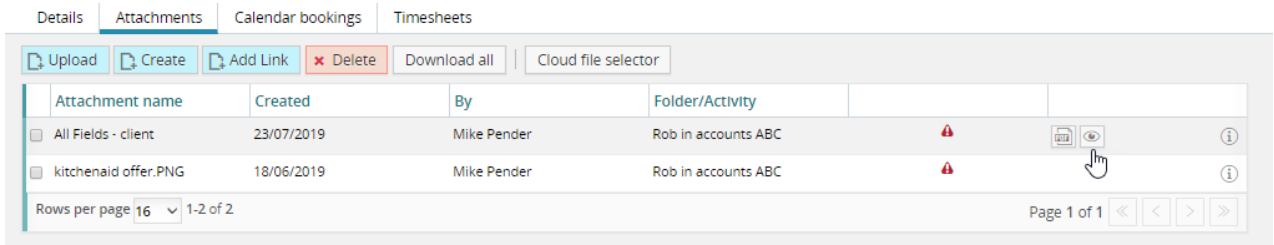
Insert Page Break

(ATTACHMENTS CONTINUED ...)

View only option

Documents opened in view only mode:

- allow users to read but not make edits
- have embedded links which are active. In edit mode, embedded links are not active.



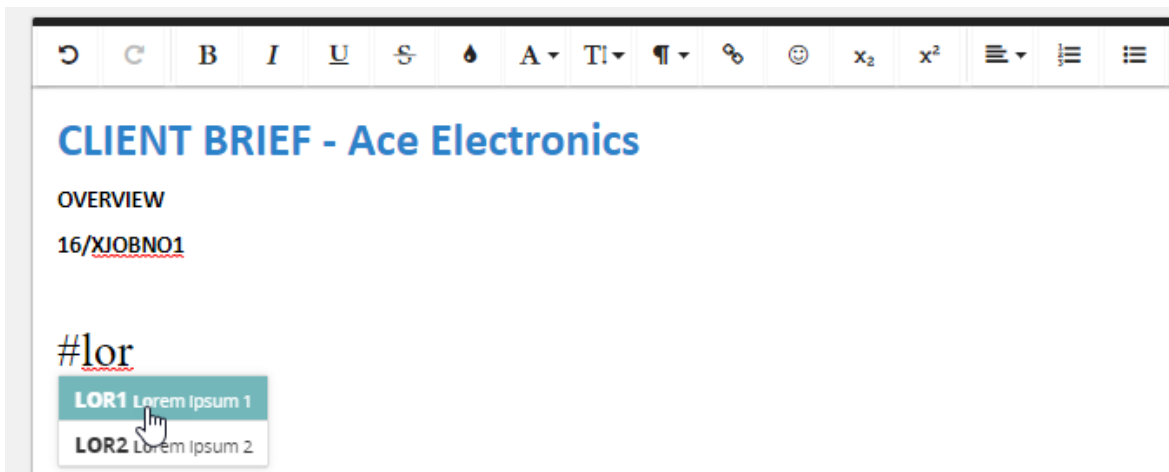
The screenshot shows a file management interface with tabs for 'Details', 'Attachments', 'Calendar bookings', and 'Timesheets'. The 'Attachments' tab is active, displaying a table of files. The table has columns for 'Attachment name', 'Created', 'By', and 'Folder/Activity'. Two attachments are listed: 'All Fields - client' and 'kitchenaid offer.PNG'. Both are created by 'Mike Pender' and are located in the 'Rob in accounts ABC' folder. The interface includes buttons for 'Upload', 'Create', 'Add Link', 'Delete', 'Download all', and 'Cloud file selector'. A pagination bar at the bottom shows 'Page 1 of 1'.

Attachment name	Created	By	Folder/Activity
All Fields - client	23/07/2019	Mike Pender	Rob in accounts ABC
kitchenaid offer.PNG	18/06/2019	Mike Pender	Rob in accounts ABC

Standard paragraphs

If a set of standard paragraphs have been set up on the system, they can be accessed from within a Synergist document by pressing the hash key (#) and selecting from the drop-down list.

Press the hash key (#) and select from the list.



Text from the standard paragraph is pasted into the document.

CLIENT BRIEF - Ace Electronics

OVERVIEW

16/XJOBNO1

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. **ne** pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, **aliu** pede mollis pretium. Integer tincidunt. Cras dapibus. Vivamus elementum semper nisi. Aenean vulputate elei **viverra** quis, feugiat a, tellus. Phasellus viverra nulla ut metus varius laoreet. Quisque rutrum.

(ATTACHMENTS CONTINUED ...)

New type of attachment – URL hyperlink

Adding URL hyperlinks via custom fields to a Client/Job/Phase provides easy access to useful websites and other online resources. However, a more ad-hoc and simpler solution is to create an attachment that works like a link.

Select 'Add link' when creating an attachment and complete the 'URL' and 'Description' fields.



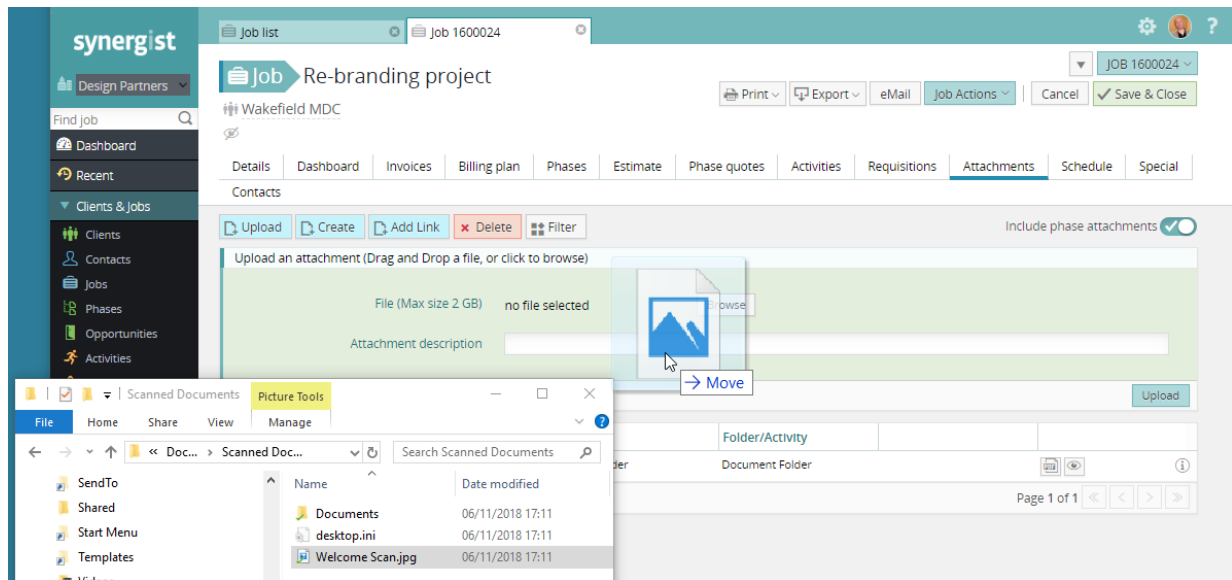
The screenshot shows a dialog box titled "Add Link". It contains two text input fields. The first field is labeled "URL" and contains the text "www.synergist.co.uk". The second field is labeled "Description" and contains the text "Synergist". At the bottom right of the dialog, there are two buttons: "Cancel" and "Save & Close".

The newly created attachment appears in the attachments list and its attachment type is a link. Simply click on the item to open the URL.

(ATTACHMENTS CONTINUED ...)

Drag and drop when uploading a file

When uploading a file to create an attachment, users have the option to drag and drop the files on to the screen. On the 'Attachments' tab, click the 'Upload' button and then drag and drop the required file from the PC/Mac file explorer.



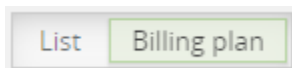
BILLING PLANS

Multi-job billing plan view

Previously, to work with billing plans it was necessary to navigate to a job or phase and view/edit the billing plan there. The new Multi-job billing plan view provides the user with an overview of the entire billing plan. This feature can be accessed from the following areas:

- Client card
- Job list
- Opportunities list
- Phase list

When navigating to a Job list or Phase list, the default view is the 'List' view. Click on the 'Billing plan' button to see the billing plan view.



The billing plan view displays all the billing plans for the jobs/phases in the current view. The jobs/phases can be filtered in the normal way or by means of the 'Views' button may be selected.

The columns on the left-hand side of the table display the job/phase details and their data can be sorted by clicking on the column headings.

Selecting a job/phase number opens the billing plan tab for in-line editing (see below).

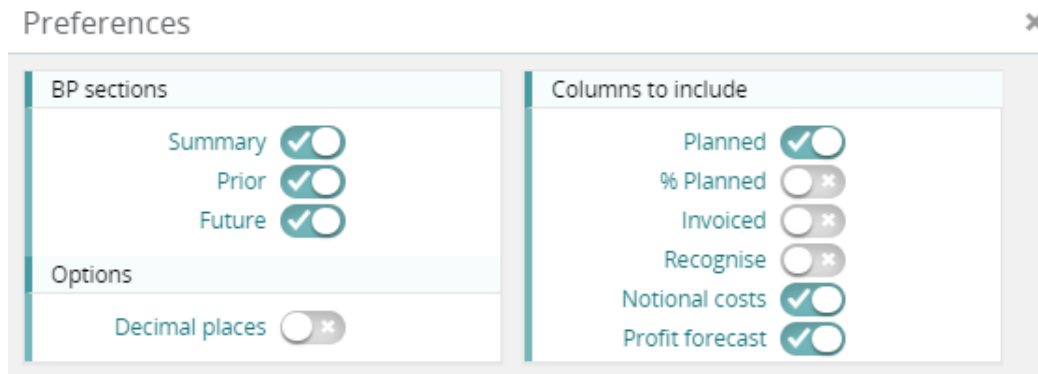
						SUMMARY			
Client	Framework	Job	Status	Description	Quoted	%	Value	Recognise	Invoiced
Ace Electronics	BP	1600032.002	Live	Production	113	100%	113	113	0
SnakeByte Software		A050003.001	Live	New Game Logo for upcoming...	8228	63%	5200	6000	0
SnakeByte Software		A050003.002	Live	Enhancements	2300	105%	2415	2415	0
Page totals					10640		7728	8528	0

To the right of the job/phase details are the 'Summary' and 'Prior' columns along with billing plans for the selected months.

						JUNE 2019				JULY 2019				AUGUST
Client	Framework	Job	Status	Description	Quoted	%	Value	Recognise	Invoiced	%	Value	Recognise	Invoiced	
Ace Electronics	BP	1600032.002	Live	Production	113	0.00%	0	0	0	100.00%	113	113	0	0.0
SnakeByte Software		A050003.001	Live	New Game Logo for upcoming...	8228	24.31%	2000	3000	0	38.89%	3200	3000	0	0.0
SnakeByte Software		A050003.002	Live	Enhancements	2300	0.00%	0	0	0	20.00%	460	460	0	85.0
Page totals					10640		2000	3000	0		3773	3573	0	

Preferences button

Options are available to control the data shown in the multi-job billing plan.

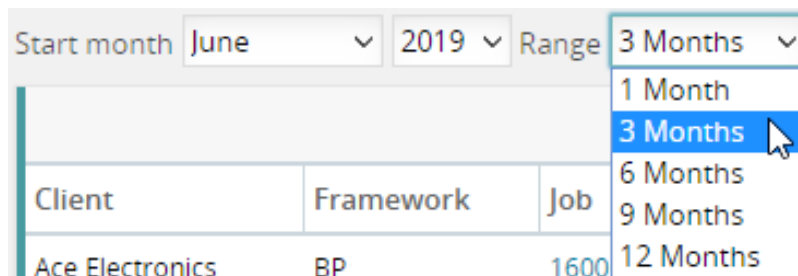


Available choices:

- **Summary**
The summary is the total of all the billing plans for the job/phase. This value includes the billing plans that fall outside the range being displayed
- **Prior**
This option totals all the billing plan values prior to the start of the monthly range
- **Future**
This options totals all the billing plan values after the end of the monthly range
- **Decimal places**
An option to show/hide decimal places
- **Columns to include**
An option to choose which columns are to be seen

Date range

The 'Start month' and the number of months can be specified.



Weighting of Billing plans

Synergist provides comprehensive weighting features which are supported in the multi-job billing plan. There are two ways of weighting billing plans and these techniques are not mutually exclusive:

Job level weighting of opportunities

An opportunity can be weighted by estimating the percentage chance of the opportunity being won.

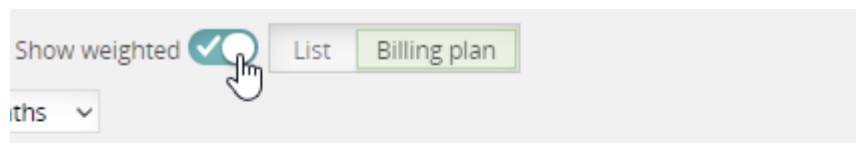
Billing plan level weighting

This is a more specialised type of weighting and is set on individual billing plans. With this method, the user weights a billing plan according to the estimated percentage chance of the required work being completed to justify the invoicing of the planned amount.

Set-up

Job level weighting is switched on by default. Billing plan level weighting is an option set in the company settings. Any billing plan with its own specified weighting overrides the job level weighting.

Viewing weighted values in the multi-job billing plan



Status	Description	Weighting %	Quoted
Quote			0
Live	Albemarle jobv cvcv	50%	500
Live	Re-branding "X-name"	100%	3000

(BILLING PLANS CONTINUED ...)

Views and filters

The multi-job billing plan shares the same 'Views' and 'Filters' as the Job/Phase lists.

Views Filter Search | List Billing plan

System views

- My open SDS phases
- My open phases
- Open phases inc. quotes
- Open phases
- All phases
- My closed phases
- Closed phases
- My views
- BP's May-July
- Maintain views
- Save/delete views

work	Job	Status	Description	Quoted
	1600032.001	Live	TV Campaign - laptops	70
	1600032.002	Live	Production	113
	A050003.001	Live	New Game Logo for upcoming...	8228
				8410

In-line billing plan edit feature

The values in the Month, Year, % and Planned columns, as well as the Recognise column, can be edited inline. This saves the user entering each billing plan item in order to alter a plan.

To access this view, select the 'Billing plan' button and click the job/phase number.

Job New Game Logo for upcoming new game

SnakeByte Software

Print Export eMail Job Actions

Details Dashboard Invoices Billing plan Phases Estimate Phase quotes Pending Activities Requisitions Attachments Schedule Special Contacts

Actions Delete Remaining to plan £0.00

Phase	Month	Year	%	Planned (E)	Recognise	Notional costs	Profit forecast	% Wgt	Billed (E)	Invoices	Comment
001	Jun	2019	30.00	£2468.25	£2468.25	£0.00	£2468.25	£0.00	£0.00		EDIT
001	Jun	2019	20.00	£1645.50	£1645.50	£0.00	£1645.50	£0.00	£0.00		EDIT
001	Jun	2019	50.00	£4113.75	£4113.75	£0.00	£4113.75	£0.00	£0.00		EDIT
			100	£8227.50	£8227.50	£0.00	£8227.50	£0.00	£0.00		

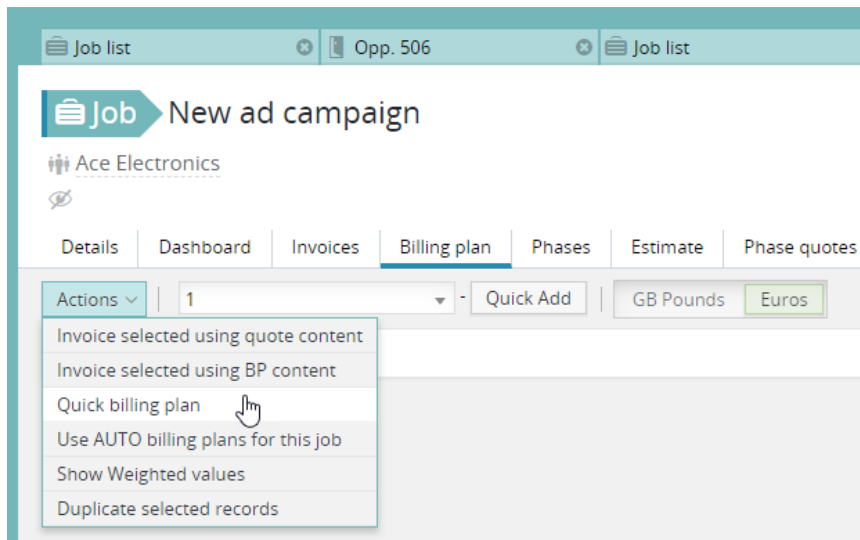
Calendar: Jun 2019

Quick billing plan

In addition to the simple 'Quick add' feature, there is now a more comprehensive feature for creating a set of billing plan items for a job or phase.

To access the 'Quick billing plan' feature from a job or a phase record:

- Select the 'Billing plan' tab
- Choose 'Quick billing plan' from the 'Actions' button drop-down list



If there are no existing billing plans for a job, the pop-up window displays a choice to:


- **Create a job billing plan**
 - Only available if user settings allow job level plans
- **Create a multi-phase billing plan**
 - If a multi-phase billing plan is selected, the user is offered a list of phases to choose from.

Quick billing plan input form

Quick billing plan ✕

Please select the starting month and number of plans you need (one for each month). Note: all plans must be dated either for the start of the month or for the end of the month

Fixed date Relative to

Starting date 

Start of month
End of month

Number of monthly billing plan stages to create

Manual planned value
 Synchronise planned value with quote

Total quoted: £2300.00

Date	% of quoted value	Value	Offset
01/07/19		<input type="text" value="0.00"/>	<input type="text" value="0"/>
Totals		£0.00	


Billing plans can be created based on fixed dates or relative dates. With fixed dates, the user selects a date. With relative dates, the plan's dates are relative to the job/phase dates.

Setting dates

If 'Fixed date' is selected, the user selects a starting date.

Please select the starting month and number of plans you need (one for each month). Note: all plans must be dated either for the start of the month or for the end of the month

Fixed date Relative to

Starting date 

Start of month
End of month

If 'Relative to' is selected, the date can be set relative to:

- Job start date / expected close date
- Job start date
- Job due date

The billing plan dates can be offset in months by plus or minus 12 months.

Please select the starting month and number of plans you need (one for each month). Note: all plans must be dated either for the start of the month or for the end of the month

Fixed date Relative to

Relative to


Offset months

The number of billing plan items to create, can also be set:

Quick billing plan

Please select the starting month and number of plans you need (one for each month). Note: all plans must be dated either for the start of the month or for the end of the month

Fixed date Relative to

Starting date 

Start of month
End of month

Number of monthly billing plan stages to create

Synchronisation


Users can now choose whether to enter 'Manual planned values' or 'Synchronise planned value with quote' using percentages. If 'Synchronise planned value with quote' is selected, the billing plan's values automatically adjust if the quoted value changes.

- Manual planned value
- Synchronise planned value with quote

Manual planned values

Please select the starting month and number of plans you need (one for each month). Note: all plans must be dated either for the start of the month or for the end of the month

Fixed date Relative to

Starting date 

Start of month
End of month

Number of monthly billing plan stages to create

Manual planned value
 Synchronise planned value with quote

Total quoted: £3592.50


Date	% of quoted value	Value	Offset
01/05/19		1000.00	0
14/06/19		950.00	0
12/07/19		1000.00	0

Synchronised planned values

Quick billing plan

Please select the starting month and number of plans you need (one for each month). Note: all plans must be dated either for the start of the month or for the end of the month

Fixed date Relative to

Starting date 

Start of month
End of month

Number of monthly billing plan stages to create

Manual planned value
 Synchronise planned value with quote

Date	% of quoted value	value	Offset
01/07/19	<input type="text" value="20"/>		<input type="text" value="0"/>
01/08/19	<input type="text" value="30"/>		<input type="text" value="1"/>
01/09/19	<input type="text" value="50"/>		<input type="text" value="2"/>
Totals	100		

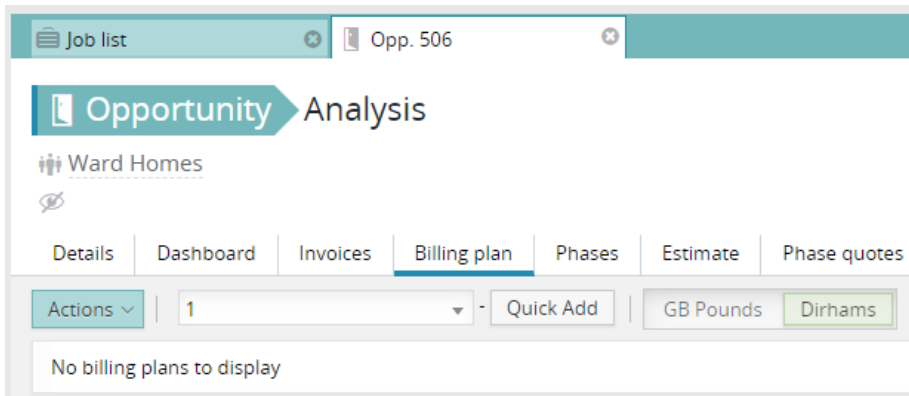
Quick Add – Now available from the job card

Note: Previously, phase level billing plans only had this feature available from the phase card.

If there are no billing plans for a job or a phase, a new 'Quick Add' feature assists in quickly generating and assigning new billing plans.

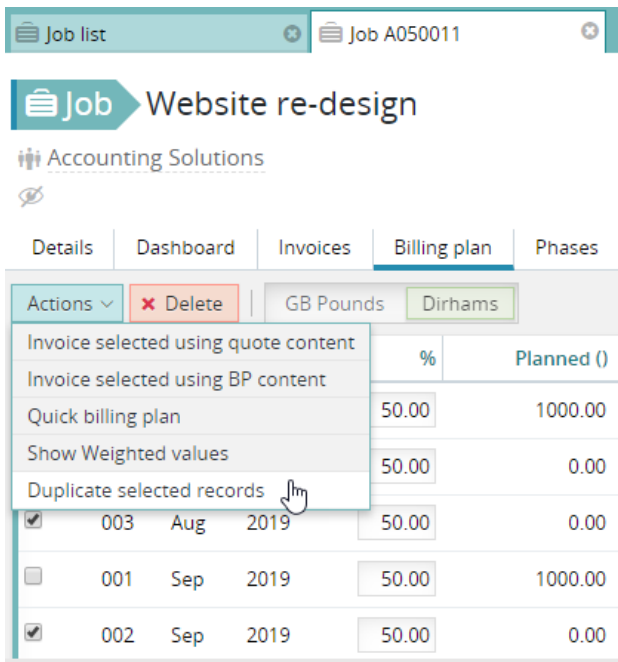
To access the 'Quick Add' feature:

- Select the 'Billing plan' tab
- Type in the number of billing plan months required
- Click the 'Quick Add' button
- The system creates monthly billing plans for all phases



Billing plan - Duplicate selected records

Billing plans are available at job and phase levels. The 'Duplicate selected records' feature copies selected billing plans to the same job or phase.



Details within the duplicated billing plan(s) can be amended by clicking the 'Edit' button on the right-hand side of the screen.

Billing plan - Change billing plan dates

This feature enables a selection of billing plan items to move backwards and forwards in time.

Select 'Change billing plan dates' from the 'Actions' button drop-down list

Phase Coding & artwork - no POs

Northern Utilities PLC

Details Dashboard Invoices **Billing plan** Time Materials Purch & exp.

Actions ▾ New Delete | GB Pounds Dirhams

	Planned (AED)	Recognise	Notional costs	Profit
Invoice selected using quote content	AED97.50	£97.50	£0.00	
Invoice selected using BP content	AED97.50	£97.50	£0.00	
Quick billing plan	AED97.50	£97.50	£0.00	
Use AUTO billing plans for this phase	AED97.50	£97.50	£0.00	
Show Weighted values	AED97.50	£97.50	£0.00	
Duplicate selected records	AED97.50	£97.50	£0.00	
Change billing plan dates	AED97.50	£97.50	£0.00	
Totals	100	AED390.00	£390.00	£0.00

Move the plans

The billing plan dates can be moved forwards or backward by intervals of a month.

Move selected billing plans ✕

Number of months to move:

Months

(value can be negative)

Cancel

CALENDAR BOOKINGS

Monthly view

To facilitate creating long bookings spanning several months, as required by companies using a consultancy model, the 'Calendar bookings' module now has the following 4 views:

- Monthly
- Weekly
- Daily
- Single day

The screenshot shows the 'Calendar bookings' module interface. At the top, there is a teal header bar with 'Calendar bookings' on the left and user profile icons on the right. Below this, the main interface has a title 'Calendar bookings' and a navigation bar with tabs for 'Monthly', 'Weekly', 'Daily', and 'Single day'. The 'Monthly' tab is selected. The calendar displays the period from July 15 to September 8, 2019. The calendar grid shows bookings for two people: Matthew Tanner and Mike Pender. Matthew Tanner has a booking '1600032 - 11 days, 0.36 hours per day' (purple) and 'Artwork - X00JOB2.001 - 28 days, 4 hours per day' (yellow). Mike Pender has a booking 'Website upc' (yellow), 'Website update - 50015.001 - 8 days, 5 hours per day' (purple), and 'Website update - 50016.001 - 6 da' (purple). The interface includes a 'Today' button, navigation arrows, a '8 weeks' dropdown, and buttons for 'Booking view', 'Loading view', 'Preferences', and a refresh icon.

Spread loading

The ability to enter dates, the total number of hours for a booking and the hours per day, and for the system to calculate the spread loading. This is useful for consultancies who have agreed to allocate a budget over an extended period. Variations of this are possible:

Example 1:

Specifying Start date, Hours per day and Total hours

Start date 1st July
Hours per day 3 hours
Total hours 150 hours

Result:

By inputting the above data, the system calculates 50 bookings are required and sets the end date accordingly.

Booking details					
Tentative	<input type="checkbox"/>	Draft	<input type="checkbox"/>	Colour	<input type="text"/>
All day	<input type="checkbox"/>	Lock dates	<input type="checkbox"/>	Hide time	<input checked="" type="checkbox"/>
Start	01-07-19		End	06-09-19	
Number of bookings	50				
Hours per day	3				
Total hours	150				

Example 2:

Specifying Start date, End date and Total hours

Start date 1st July
End date 31st October
Lock dates Checked (required to stop the dates from changing)
Total hours 160 hours

Result:

The system calculates 89 bookings are required at 1.8 hours per day.

Booking details					
Tentative	<input type="checkbox"/>	Draft	<input type="checkbox"/>	Colour	<input type="text"/>
All day	<input type="checkbox"/>	Lock dates	<input checked="" type="checkbox"/>	Hide time	<input checked="" type="checkbox"/>
Start	01-07-19		End	31-10-19	
Number of bookings	89				
Hours per day	1.8				
Total hours	160				

(CALENDAR BOOKINGS CONTINUED ...)



Example 3:

Specifying Start date, End date and Hours per day

Start date 1st July
End date 31st October
Hours per day 3 hours

Result:

The system calculates 87 bookings are required totaling 261 hours.

Booking details						
Tentative	<input type="checkbox"/>	Draft	<input type="checkbox"/>	Colour	<input type="text" value=""/>	
All day	<input type="checkbox"/>	Lock dates	<input type="checkbox"/>	Hide time	<input checked="" type="checkbox"/>	
Start	01/07/2019					
End	31/10/2019					
Number of bookings	87					
Hours per day	3				Total hours	261

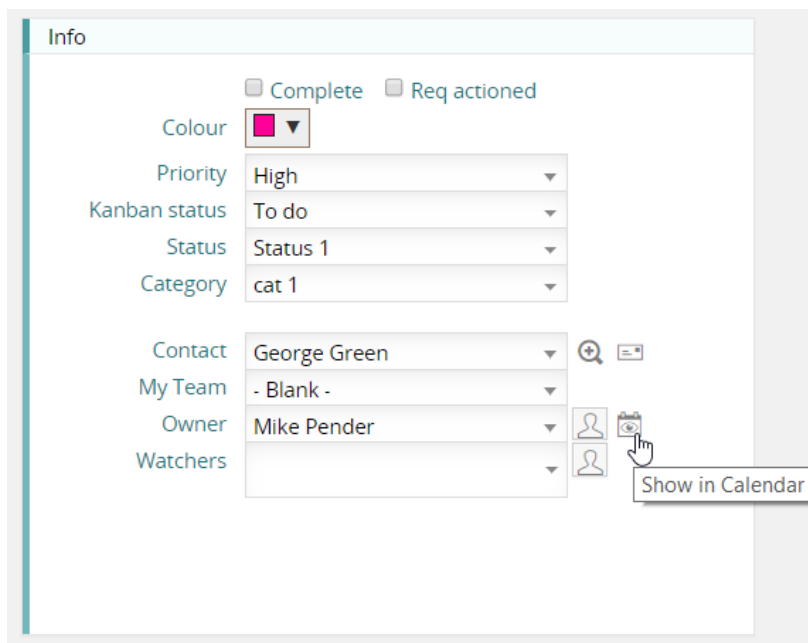
Option to show activities in Calendar

For companies wishing to use requisitions as work tickets, these can now be automatically displayed in the calendar based on the start and due dates of the activity.

The traditional 'Waterfall' approach created time estimates, dropped them into a calendar to allocate the work to staff, and then had staff create timesheets against the estimates either via MyCalendar or Weekly Timesheets. This new feature provides for a more Agile working method, enabling teams to use requisitions as simple work tickets. This Agile approach specifies the required work using requisitions and work tickets visible on Kanban boards and in Synergist calendars. Staff simply create and submit timesheets using the Quick timesheet feature within the requisition. (Please refer to the 'Activities' section of this document for more information.)

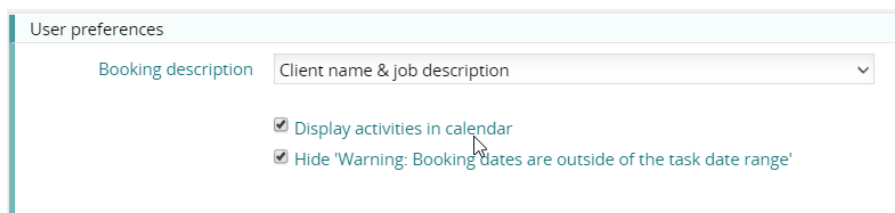
Enabling an activity to be visible in calendars

The default setting for activities and requisitions to be included or hidden from calendars is set by the Activity types table in File Maintenance. However, activities and requisitions can be individually set up to be included or hidden from calendars.



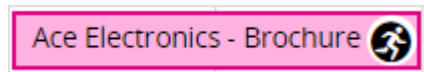
Activities in the Calendar view

Including activities in the calendar view is enabled in 'Preferences' in both 'Calendar bookings' and 'MyCalendar'.



Activity icon

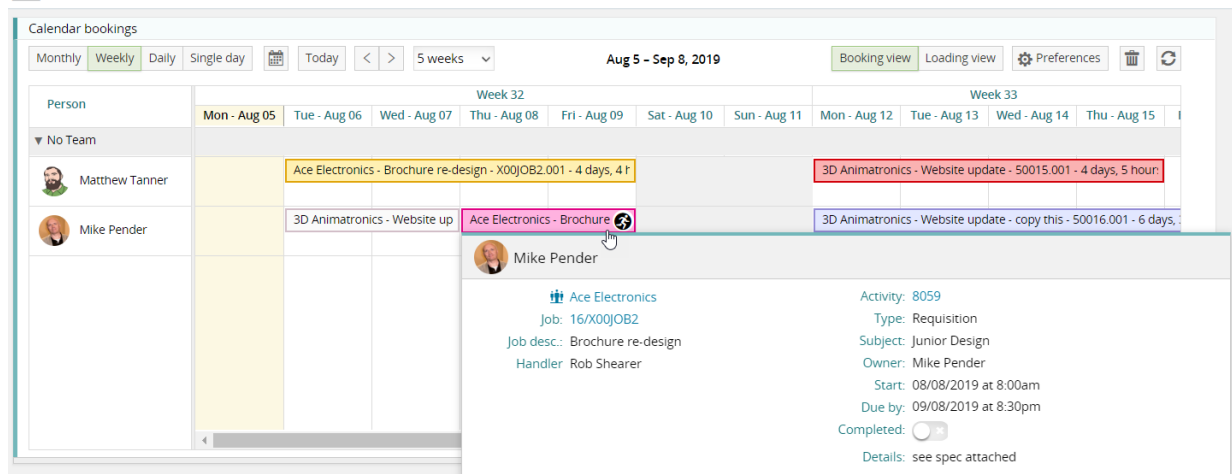
The running person icon is used to identify activities in the calendar. The background colour of the bar is set in the activity record.



Calendar showing bookings and activities

Activities in a calendar can be moved and resized. To edit an activity in the calendar, click on the activity bar and the activity will open in a new tab.

Calendar bookings




Start date added to requisitions / activity records

Previously, activity records only supported a 'Due date'. A new 'Start date' column has been added and can be used to indicate the planned commencement date for a requisition. The 'Start date' can also be used to trigger alerts.

To view the 'Start date' in the requisitions list:

- Select 'Calendar bookings' in the main menu
- Click the 'Get requisitions' button

Stage	Requested by	Start date	Due date	Preferred p...	Booked	Requisition
		We 15/05/2019	We 26/06/2019		4	ID 8058 Artwork 
Job desc.: New ad campaign		Requisition: 8058 Subject: Artwork Details: see spec				

Hiding start and end times

Booking without time of day

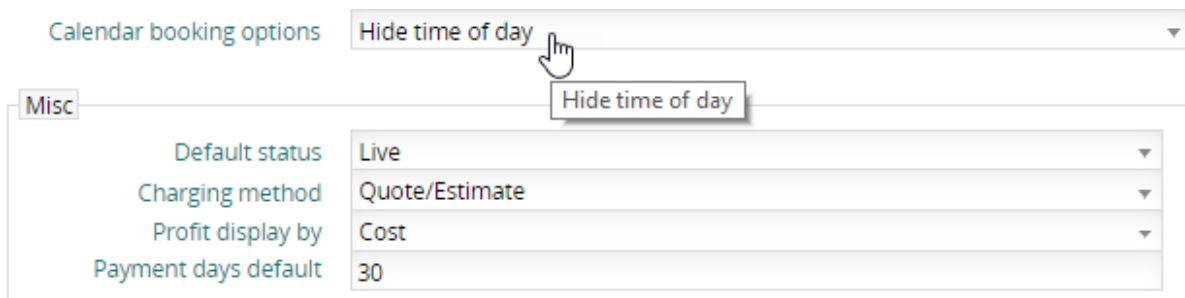
Consultancies typically book work into calendars using hours per day rather than time of day. For those users who prefer this way of working, it is now possible to hide the start and end times of a booking.

Company settings

To switch on this feature:

- Navigate to Settings
- Select 'Companies' from the drop-down list
- Click on the required company
- Choose the 'Defaults' tab
- Locate 'Calendar booking options' drop down-menu
- Select 'Hide time of day'

This sets the default for all new calendar bookings to hide the start and end time of a booking. It also auto hides any features that rely on the start and end time being used.



The screenshot shows a settings interface. At the top, there is a dropdown menu labeled 'Calendar booking options' with 'Hide time of day' selected. Below this is a 'Misc' section containing four settings, each with a dropdown menu:

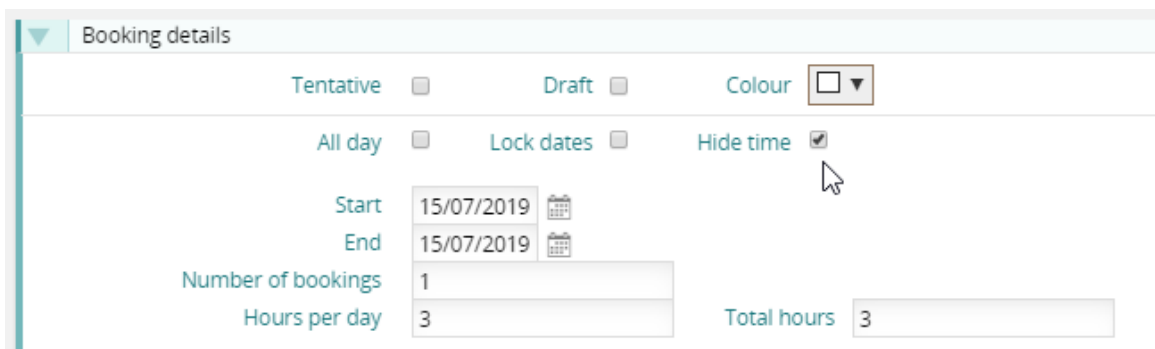
Setting	Value
Default status	Live
Charging method	Quote/Estimate
Profit display by	Cost
Payment days default	30

Note: If working with multiple companies, all companies that have been selected to be in the same view in Calendar bookings must be given the same setting for this feature to work correctly.

(CALENDAR BOOKINGS CONTINUED ...)

Booking details window

With 'Hide time' set, the start and end times of day are hidden.



The screenshot shows the 'Booking details' window with the following settings:

Tentative	<input type="checkbox"/>	Draft	<input type="checkbox"/>	Colour	<input type="text" value=""/>
All day	<input type="checkbox"/>	Lock dates	<input type="checkbox"/>	Hide time	<input checked="" type="checkbox"/>
Start	15/07/2019 <input type="text"/>				
End	15/07/2019 <input type="text"/>				
Number of bookings	1 <input type="text"/>				
Hours per day	3 <input type="text"/>				
Total hours	3 <input type="text"/>				

Once 'Hide time' has been selected, the following features are turned off:

Calendar bookings

- The daily view
- The weekly view
- Start-end times in calendar preferences

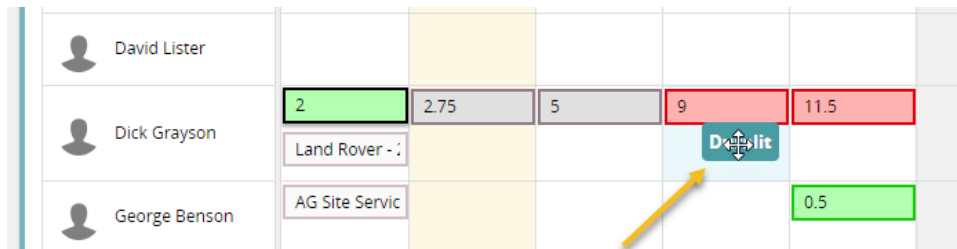
MyCalendar

- The week view
- The day view

Loading view – Ability to create a booking

In the loading view, it is already possible to click the loading bar and move/amend the bookings associated with the loading. This has now been enhanced to allow the user to drop a new booking into this view. Once the booking has been edited or stretched, the booking disappears and the loading for the cell is refreshed.

Booking being dropped on to the loading view



The screenshot shows a calendar interface with three rows of users: David Lister, Dick Grayson, and George Benson. The calendar grid has columns representing time slots. A yellow bar highlights a time slot from 2.75 to 5. A red bar highlights a time slot from 9 to 11.5. A green bar highlights a time slot from 0 to 0.5. A blue box with a double-headed arrow and the text 'Drop it' is positioned over the 9-11.5 slot, with a yellow arrow pointing to it from the bottom right. Below the user names, there are text boxes for 'Land Rover - :', 'AG Site Servic', and '0.5'.

User	2	2.75	5	9	11.5	
David Lister						
Dick Grayson	2	2.75	5	9	11.5	
George Benson						0.5

Auto scrolling

The auto scroll feature assists when dragging a job estimate or requisition to a destination that is not on the screen.

To view this feature:

- Select 'Calendar bookings' in the main menu
- Click the 'Get job estimates' or 'Get requisitions' button
- Drag a job estimate or requisition onto the calendar

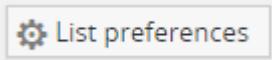
Calendar bookings estimate and requisitions list

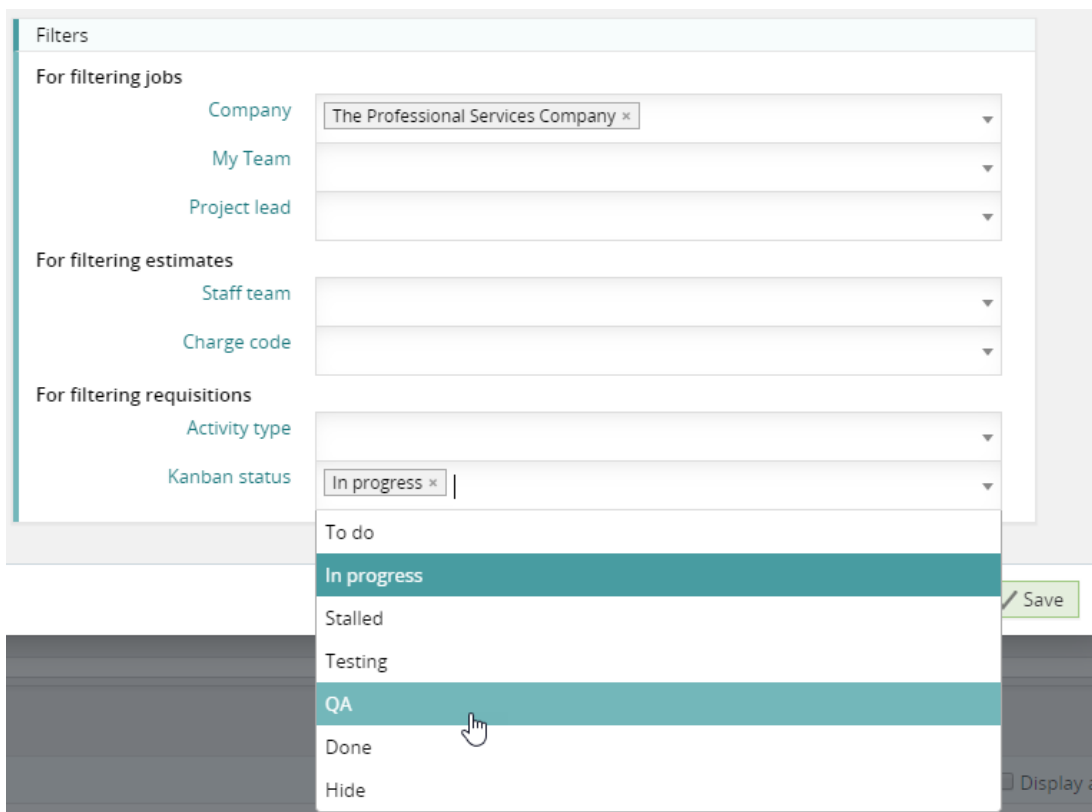
- Job and phase descriptions formatted into separate columns
- Phase description added to Requisition list

Kanban status filter for requisitions in Calendar bookings

When viewing a list of requisitions in 'Calendar bookings', the items in the list can be filtered by Kanban status.

To access this feature:

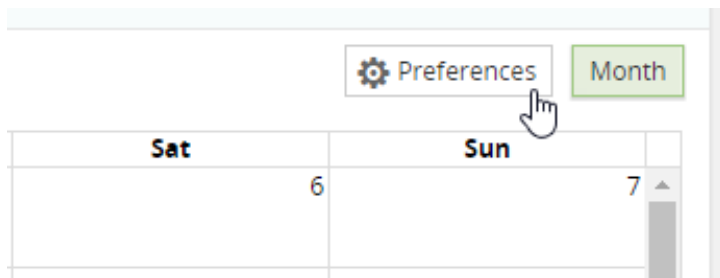
- Select 'Calendar bookings' from the main menu
- Locate and click the 'List preferences' button on the right-hand side of the screen

- Select one or more Kanban statuses for filtering
- Click 'Save' or 'Cancel' to apply the filter and to close the 'List preferences' window



CALENDAR - MYCALENDAR

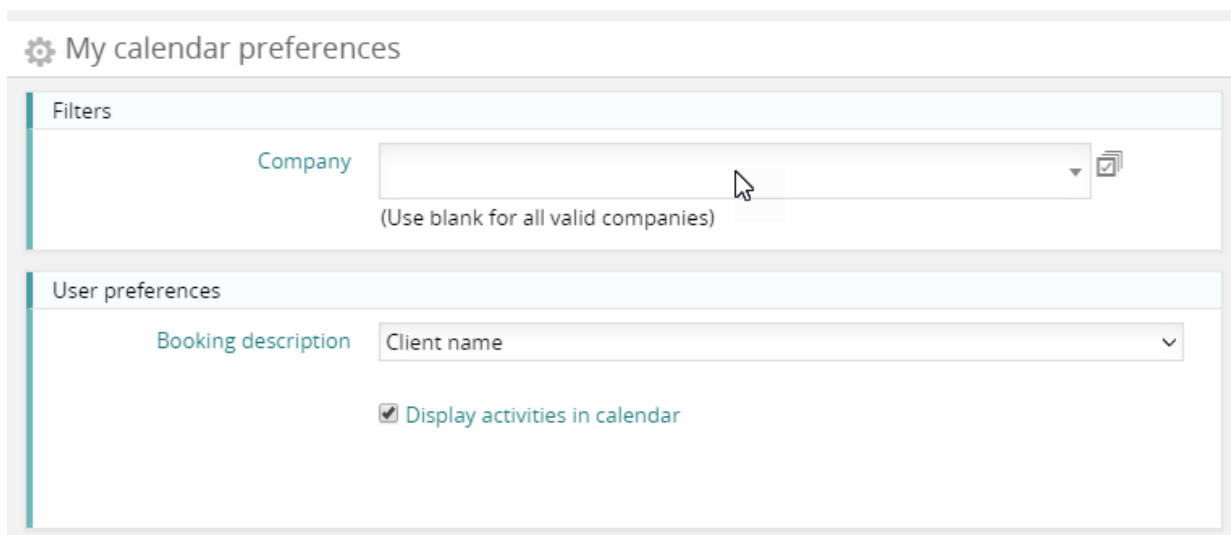
Preferences

A 'Preferences' button has been added to MyCalendar.



Company filter

It is now possible to select which companies to include in the calendar view. To see bookings for all companies, leave the option blank.



Booking description

The selected description applies to bookings and any activities displayed in the view.

Options

- Client name
- Client name & job description
- Job description
- Phase description
- Activity subject (normally a requisition)

Display activities in calendar (tick box)

This feature gives the option to include activities in the calendar view. For an activity to be included in the calendar view:

- the user must be the owner of the activity and
- the activity has been set to be visible in calendars

CLIENTS, PROSPECTS & LEADS

New filter option in Client list - Charge code restricted

This new filter enables the user to identify all those clients that have special prices where 'Only allow these charge codes' has been selected for the client.

Only allow these charge codes

Client filter

The screenshot shows a 'More filters' panel with a 'Client' filter section. The 'Charge code restricted' filter is highlighted with a mouse cursor, and a tooltip shows the selected option: 'Only allow these charge codes for this client'.

Filter Name	Selected Value
Client	Client
Include	Clients x
Status	Active
Type	Both internal & external
Source	
Client type	
Status	
Market sector	
Lead rating	
Country	
Invoice printing preference	
Charge code restricted	Only allow these charge codes for this client
Handler	

CLIENT & SUPPLIER CONTACTS

Invoice address flag displayed on Client contact list

Client: 3D Animatronics

Map Print Actions Cancel Save & Close

Details Contacts Activities Requisitions Attachments Financial Targets Invoices Jobs Phases Frameworks

Sub frameworks Notes Prices SDS SDS data System info Invoice content Users

Actions New Delete

Name	Phone	Email	Job title	Opted in	Inv add	Inv cc
Graham Smith	020 7297 5600	graham.smith@3DAnim.com	Head of Marketing & Business...	✓		
Jim Alert		jim.alert@xxx111.com				
Steve Daily	020 7297 5600				✓	

Surname / first name order

When displaying first names and surnames, the default setting shows the surname first. The 'Surname / first name' order can be swapped when viewing the Client and Supplier contact lists.

To access this feature:

- Select 'Client contacts' or 'Supplier contacts' in the main menu
- Click the 'Actions' button
- Choose the appropriate 'Display surname first' or 'Display surname last' option

Actions

- Batch update
- Display surname first
- Filter by eMail addresses
- Batch create activity

or

Actions

- Batch update
- Display surname last
- Filter by eMail addresses
- Batch create activities

(CONTACTS CONTINUED ...)

Automatic domain name for email addresses

When adding a new client or supplier contact, the email address domain is now automatically entered into the email address field. The user can enter the email address to the left of the @ sign. This saves the user typing out the domain name for every contact created.

If nothing is entered to the left of the @ sign, the domain text is cleared and won't be stored when saving the record.

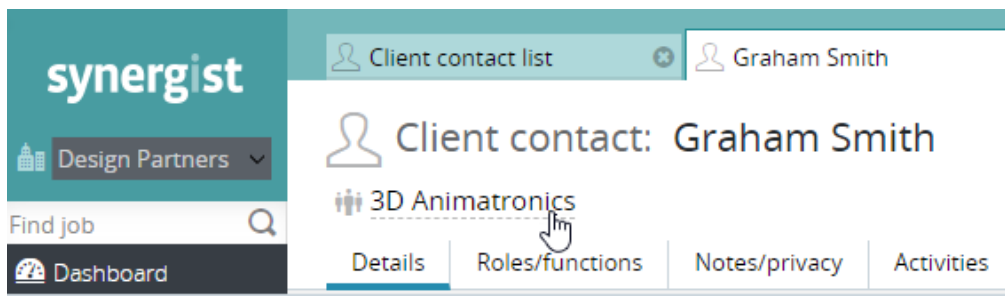
- **name@hotmail.com**
This email address includes a name and will be saved
- **@hotmail.com**
This email address doesn't include an email address and won't be saved.

New link from 'Client contact' to 'Client'

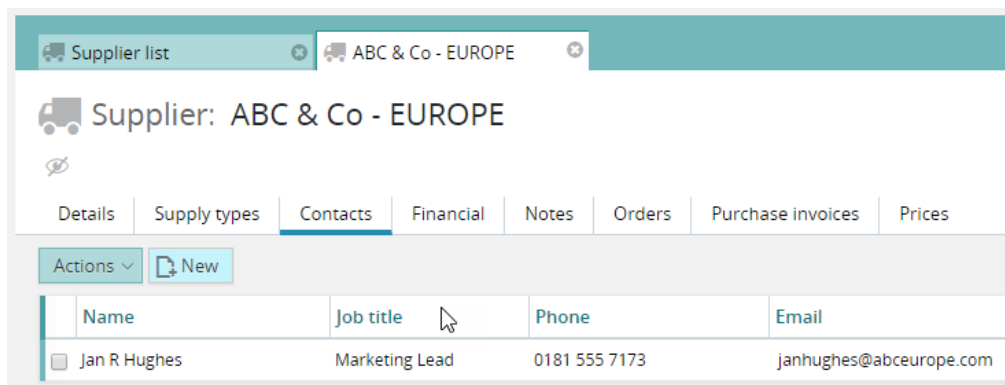
To improve navigation, there is a link in the 'Client contact' screen to the main 'Client' screen.

To view this feature:

- Select 'Contacts' in the main menu
- Open one of the contacts in the 'Client contact list'
- Click the client link towards the top of the screen



Job title column added to Supplier contact



Linked clients

New section added to the Notes tab of a client card listing any parent clients.

EMAIL & PDFS

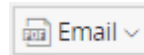
Creating an email in a cloud email client

If using Gmail or Microsoft outlook (Office 365), emails can be created using the email address stored against contacts in Synergist. This feature is particularly useful if wishing to send a Synergist generated quotation or PDF of an invoice/purchase order.

Creating emails and attaching PDFs is supported in the following areas:

- Quoting
- Invoicing
- Purchasing

Select the 'Email' button on the Quote screen



Click the 'Email' button and select the required template from the drop-down list.

Phase Artwork

Ace Electronics

PHASE R050044.001

Print Export Email Phase Actions Cancel Save & Close

Details Dashboard Invoices Billing plan Time Materials Purch & exp. Estimate Quote Activities Works ticket Attachments Schedule Special Contacts

Build quote Actions Print Email Quote date: 00/00/00

Add Copy Join Delete

Description	Quantity	Unit price	% Discount	Value	Style
Services as detailed on spreadsheet	1	575.00	10.00	517.50	
Billable Total				€517.50	
Client investment				€0.00	
Net estimated profit				32%	
Gross estimated profit				100%	

(EMAIL CONTINUED ...)

Select the client contact

Select recipients for the email.

The first time this feature is used, the user needs to select the web email client they are using. This opens a new browser window where the user is asked to sign in and give permission for Synergist to have access to the user's web email client.

Create email (auto attach PDF) ✕

Client contacts

To

cc

Cancel

Gmail
Office 365

Email client

An email is created in the chosen web-based email client and includes the chosen recipient along with a PDF of the quotation document.

ESTIMATING

Time and bookings screen

A new feature, 'Time and bookings', has been added to the 'Estimate' tab. The screen provides a simplified in-line method for building estimates, enabling users to simultaneously create bookings against estimates.

The 'Time and bookings' function can also be used as a method for analysing remaining budgets on jobs and phases. Users can see original budgets for:

- time (the estimates)
- the total time submitted by staff against budgets
- how much time remains booked into calendars

Any overbooking is highlighted in red, making it easy to identify when a job is likely to go over budget.

New job – no estimates created

Click on the 'Time and bookings' button to open the new interface.

The screenshot shows the 'Time and bookings' interface for job 'Special signage'. The top navigation bar includes 'Job Special signage', 'Ace Electronics', and various action buttons like 'Print', 'Export', 'eMail', 'Job Actions', 'Cancel', and 'Save & Close'. The 'Estimate' tab is selected, and the 'Time and bookings' sub-tab is active. A 'Display' panel shows options for 'Financial totals', 'Bookings & timesheet totals', and 'Display booking summaries'. Below this is a table with columns for 'Hours', 'Current bookings', 'Timesheets', and 'Remaining'. The table shows a single row for '001' with all values at 0.00. A '+ Add estimate' button is visible below the table.

	Hours	Current bookings	Timesheets	Remaining
001	0.00	0.00	0.00	0.00

Create an estimate

Time estimates can be created from here.

The screenshot shows the 'Time and bookings' interface with a new estimate being added. The table now has two rows. The first row is '001' with 5.00 hours, 0.00 current bookings, 0.00 timesheets, and 5.00 remaining. The second row is a new estimate for 'Consultancy' with 5 hours, 0.00 current bookings, 0.00 timesheets, and 0.00 remaining. A 'Save' button is visible next to the second row, and a '+ Add estimate' button is at the bottom.

	Hours	Current bookings	Timesheets	Remaining
001	5.00	0.00	0.00	5.00
Consultancy	5	0.00	0.00	0.00

(ESTIMATING CONTINUED ...)

Create a calendar booking

Once an estimate has been created, bookings may be created for it in the calendar.

	Hours	Current bookings	Timesheets	Remaining
001	5.00	0.00	0.00	5.00
Consultancy	Hours <input type="text" value="5.00"/>	0.00	0.00	5.00 <input type="button" value="x"/>

Adding a booking

If ticked, the initial checkbox indicates all day bookings. Untick the box to book less than a full day. The next step is to type in the number of bookings or use the dates to calculate the number of bookings automatically.

	Hours	Charge rate	Cost	Rec. charge	Remaining
001	5.00		100.00	450.00	5.00
Consultancy	Hours <input type="text" value="5.00"/>	90.00	100.00	450.00	5.00 <input type="button" value="x"/>

BOOKINGS

	Hrs per day	Bookings	Total hrs	Start	End
Matthew Tanner	<input type="checkbox"/> <input type="text" value="4"/>	<input type="text" value="4"/>	4	03/08/2019 <input type="text" value="09:00:00"/>	03/08/2019 <input type="text" value="13:00:00"/>

Booking summary

The 'Display booking summary' option shows information regarding bookings and timesheets related to the estimate. Switch this on in the 'Display' panel.

Display

Financial totals Display booking summaries

Bookings & timesheet totals

Using the booking summary has the advantage of displaying the number of hours remaining to be booked into the calendar.

	Hours	Charge rate	Cost	Rec. charge	Remaining
001	5.00		100.00	450.00	1.00
Consultancy	5.00		100.00	450.00	1.00

BOOKINGS SUMMARY

Current bookings	4.00 work planned
Timesheets	0.00 work done
Hours remaining	1.00

BOOKINGS

	Hrs per day	Bookings	Total hrs	Start	End
Matthew Tanner	4.00	1	4.00	03/08/2019 <input type="text" value="09:00:00"/>	03/08/2019 <input type="text" value="13:00:00"/>

(ESTIMATING CONTINUED ...)

Rolled up views.

When multiple estimate lines have been created over multiple phases, and calendar bookings have been created in allocating the work, various rolled up views are available to make it easier in managing this amount of data.

Detail levels – Phase

If 'Phases' is selected from the 'Detail level' drop-down list, the view collapses to phases.



Full estimate Time and bookings

Detail level ▾

- Phases
- Stages
- Estimates
- Bookings
- All

Display booking summaries

et totals

		Hours	Charge rate	Cost	Rec. charge	Remaining	
001	001 Consultancy	42.00		935.46	1715.56	6.00	
002	002 Artwork & design	23.00		1015.56	1847.35	23.00	
003	003 Website overhaul	53.00		4655.56	9542.00	-5.00	
004	004 Testing	4.00		400.00	361.80	-3.50	

Detail levels – Stages

If 'Stages' is selected from the 'Detail level' drop-down list, phases and stages are displayed.

		Hours	Charge rate	Cost	Rec. charge	Remaining	
001	001 Consultancy	42.00		935.46	1715.56	6.00	
	Proofing	35.00		835.56	1541.56	-1.00	
	Estimate Stage	7.00		0.00	14.00	7.00	
	Ready for invoicing	0.00		0.00	0.00	0.00	
002	002 Artwork & design	23.00		1015.56	1847.35	23.00	
	MyStage	7.00		355.56	573.35	7.00	
	Ready for invoicing	11.00		660.00	1264.00	11.00	
	Estimate Stage	5.00		0.00	10.00	5.00	
003	003 Website overhaul	53.00		4655.56	9542.00	-5.00	

(ESTIMATING CONTINUED ...)

Detail levels – Estimates

If 'Estimates' is selected from the 'Detail level' drop-down list, phases, stages and estimates are displayed.

	Hours	Charge rate	Cost	Rec. charge	Remaining
001 Consultancy	42.00		935.46	1715.56	36.00
Proofing	35.00		835.56	1541.56	29.00
Artwork - bookable in MyCalendar	2.00		0.00	200.00	2.00
CC for jon	0.00		0.00	0.00	0.00
Rail Engineer 1(mike's skill)	4.00		400.00	363.97	4.00
Rail Engineer 2 (mikes default)	4.00		55.56	303.81	2.00
Simple	2.00		200.00	301.80	-1.00
Special	3.00		180.00	331.98	2.00
Technical authorship	20.00		0.00	40.00	20.00
Estimate Stage	7.00		0.00	14.00	7.00
Technical authorship	7.00		0.00	14.00	7.00
Ready for invoicing	0.00		0.00	0.00	0.00
Widget making	0.00		0.00	0.00	0.00
002 Artwork & design	23.00		1015.56	1847.35	23.00
MyStage	7.00		355.56	573.35	7.00
Rail Engineer 1(mike's skill)	Hours <input type="text" value="3.00"/>	90.45	300.00	271.35	3.00 <input type="text" value="x"/>
Rail Engineer 2 (mikes default)	Hours <input type="text" value="4.00"/>	75.50	55.56	302.00	4.00 <input type="text" value="x"/>

Expand / collapse

Sections can be expanded to show a greater level of detail.

In this example, a phase is expanded to show estimates, but the bookings are still collapsed.

	Hours	Charge rate	Cost
001 Artwork	16.00		308.00
Consultancy	10.00		200.00
Presentation Prep	Hours <input type="text" value="6.00"/>	0.00	108.00

Click the expand / collapse icon



The section is expanded

	Hours	Charge rate
001 Artwork	16.00	
Consultancy	10.00	
BOOKINGS SUMMARY		
Current bookings	4.00	work planned
Timesheets	0.00	work done
Hours remaining	6.00	
BOOKINGS	Hrs per day	Bookings
Matthew Tanner	4.00	1
Total hrs	4.00	07/08/2019
Start		
+ Add a calendar booking		
Presentation Prep	Hours <input type="text" value="6.00"/>	0.00

(ESTIMATING CONTINUED ...)

Zero value estimates

When using the quick estimate feature, by default the screen includes a row for any staff who booked time against the job. This may result in a charge code being displayed multiple times. To hide these items, untick the checkbox 'Show allocated estimate rows that have a zero value'.

Multiple charge codes displayed

Retrieval		<input type="text" value="6"/>	- +	hours
Senior Mac Work		<input type="text" value="4"/>	- +	hours
Consultancy		<input type="text" value="3"/>	- +	hours
Consultancy	Mike Pender	<input type="text" value="0"/>	- +	hours

Quick estimate

To remove the duplicates, untick the checkbox.

Filters

Staff

Charge code type

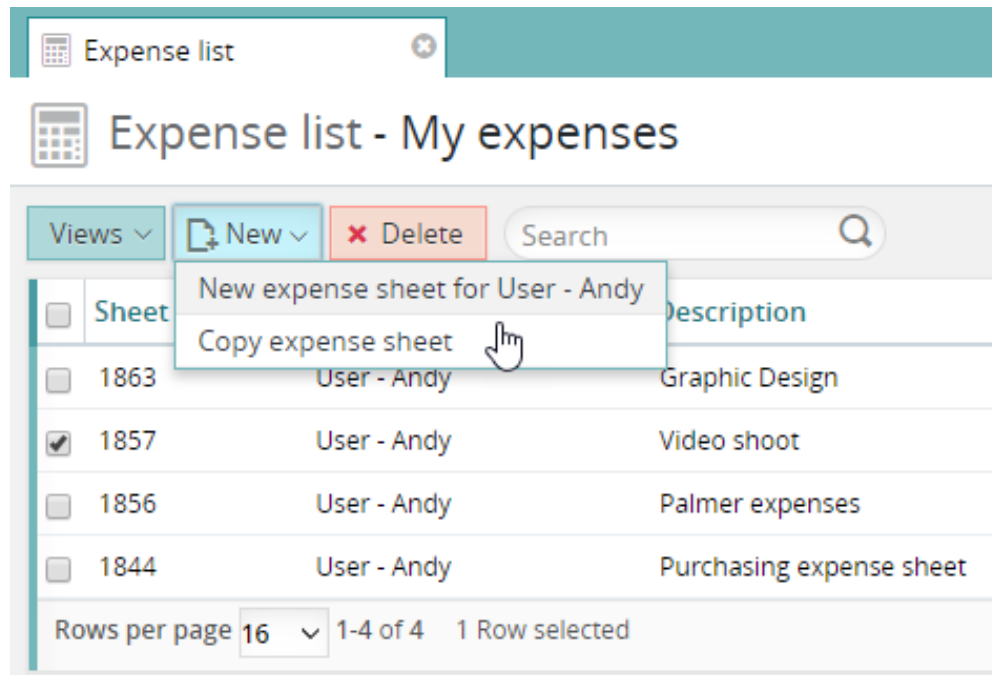
Show allocated estimate rows that have a zero value

EXPENSES

Copy expense sheet

To access the 'Copy expense sheet' feature:

- Select 'Expenses' in the main menu
- Tick only one of the expense sheets in the 'Expenses list'
- Click the 'New' button
- Select 'Copy expense sheet' from the options



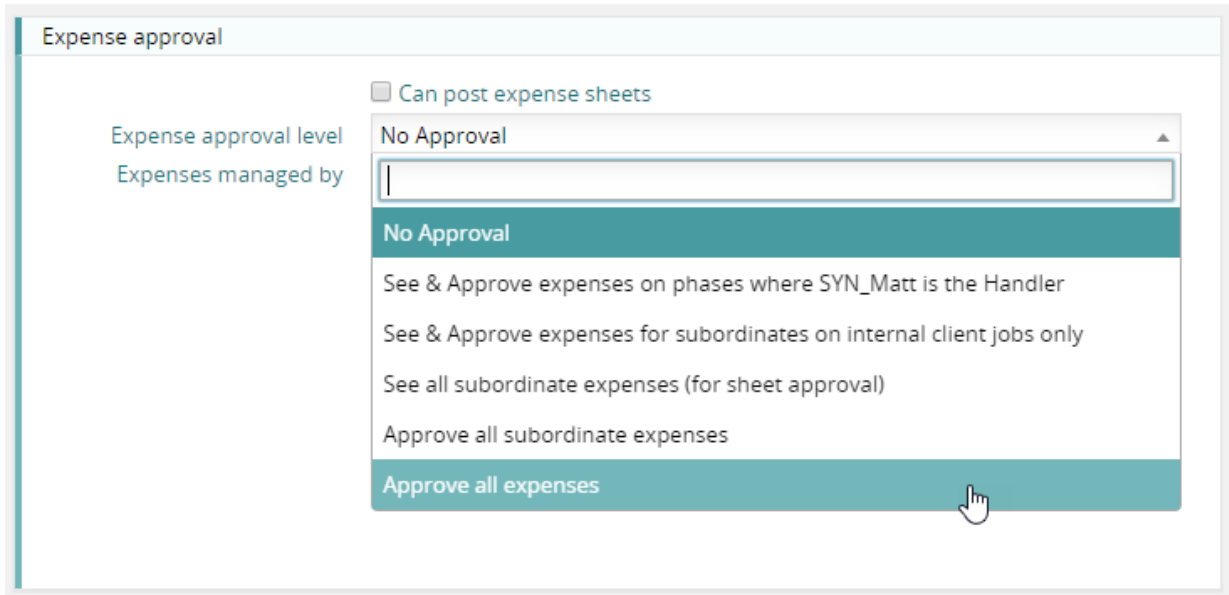
The copied expense sheet displays the current date and its status is 'Unsubmitted'.

(EXPENSES CONTINUED ...)

Expense approval – Approval options

Expense sheets are now filtered to better support the approval level options specified in the user settings approval tab (Settings > File Maintenance > Users > Approval tab).

Approval level options



(EXPENSES CONTINUED ...)

Expense lines order number

The expense line order number updates when expense lines are re-ordered.

After re-sorting, users have the option to use the latest enhancement and renumber the lines, so that the 'Expense sheet' PDF follows the same order as the expense lines.

To view this feature:

- Select 'Expenses' in the main menu
- Open one of the expense sheets in the 'Expense list'
- Click the 'Actions' button
- Choose 'Re-number lines using current sort order'

Expense list | Video shoot

Expense sheet: 1871

Expense account: User - Andy
Description: Video shoot
Date: 27/06/2019

Expense lines

Actions ▾ | Add | Delete

		/Phase ▾	Expense type
<input type="checkbox"/>	1 Achilles Group Ltd	8767.001	Discount supply type
<input type="checkbox"/>	2 Achilles Group Ltd	8767.001	Discount supply type
<input type="checkbox"/>	3 Barb Wired	8843.001	Hotel Expenses1
<input type="checkbox"/>	4 Barb Wired	8843.001	Hotel Expenses1
<input type="checkbox"/>	5 Candy Space	88665.001	miscellaneous expenses
<input type="checkbox"/>	6 Oakwood Medical Centre	w0003654.001	Travel

INVOICING

Improvements to the invoicing interface

New buttons – Add/Copy/Delete

- Checkboxes have been added to each invoice line
- Add/Copy/Delete options are available on separate buttons

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

Actions ▾

Description	Quant...	Unit price	Net total	VAT	VAT amount	Gross total	Nominal	Style
<input type="checkbox"/> Services	0	0.0000	200.00	1 (UK ...)	40.00	240.00	++1600004	<input type="button" value="B"/> <input type="button" value="f"/> <input type="button" value="u"/>
<input type="checkbox"/> Print costs	0	0.0000	1000.00	1 (UK ...)	200.00	1200.00	++1600004	<input type="button" value="B"/> <input type="button" value="f"/> <input type="button" value="u"/>
Totals			1200.00		240.00	1440.00		

Moving a row

To move a row, click and hold the start of the row, then drag it to a new position.

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

Actions ▾

Description	Quant...	Un...	Ne...	VAT	VA...	Gr...	No...	Style
<input type="checkbox"/> Print costs	0	0.0000	1000.00	1 (UK 20%) St...	200.00	1200.00	++1600004	
<input type="checkbox"/> Services	0	0.0000	200.00	1 (UK ...)	40.00	240.00	++1	<input type="button" value="B"/> <input type="button" value="f"/> <input type="button" value="u"/>
Totals			1200.00		240.00	1440.00		

Invoice header auto-analysis

Option to always use actuals for sales header auto-analysis

The sales header auto-analysis feature uses estimates to create nominal codes and values to distribute between nominal codes for an invoice. The only exception is when the invoice content is based on 'Actual Costs'. In this case, the nominal values distributed are based on the costs ticked-off (as billed only).

This new option is a company setting forcing the costs ticked-off to always be used in the nominal code/value distribution for sales header auto-analysis.

Company settings – accounts tab

Analysis

Sales analysis:
(header level)

- Sales header nominal analysis
- Tied to invoice line allocation
- Use proportional calculation for auto-analysis
- Nominal analysis force on draft
- Always use actuals for auto-analysis
- Nominal analysis using recognised values

(INVOICING CONTINUED ...)

ASBOF/BASBOF - Invoice levies

For companies invoicing clients for advertising related services, this feature automatically creates an extra line on invoices when required to bill the ASBOF/BASBOF fee.

Set up

Certain company settings need to be considered in order to use this feature.

The 'Levy percent' is defined in 'File Maintenance' under the 'Levies' section. Check the default values as required.

File maintenance

Levies List London (three)

Levy code	Levy description	Nominal	Levy percent	VAT code
ASBOF	ASBOF	201	0.1	0 (UK 0% - ZERORATEDOUTPUT)
BASBOF	BASBOF	202	0.2	0 (UK 0% - ZERORATEDOUTPUT)

Page 1 of 1

Company settings

To activate this feature:

- Navigate to the 'Company settings List'
- Select the required company
- Click on the 'Switches' tab
- Scroll down and locate the 'Sales invoicing panel'
- Tick the 'Enable levies' option

Sales invoicing

- Enable draft approval
- Auto tickoff
- Auto tickoff on writeoffs
- Extra analysis/ref field
- Net to invoice calculated from tickoff
- Do not transfer invoice order no. back to job or phase
- Enable levies

(INVOICING CONTINUED ...)

Supply types

If a user bills from costs, they can have the invoice automatically select the correct levy for advertising purchases. This is set up in file maintenance under 'Supply types'. Any purchase of this type is set to be ASBOF items and auto generates a levy line at the bottom of the invoice.

If billing from costs, the invoice can be configured to automatically select the correct levy for advertising purchases.

To activate this feature:

- Navigate to 'File Maintenance'
- Select 'Supply types'
- Choose a supply type from the list
- Locate the 'Levy code' drop-down list

Supply types

Details | Advanced

Details

Supply type: 3/TT

Description: TV advertising

Inactive

Purchase or expense: Purchase & Expense

Levy code: ASBOF

Internal or external: Internal & External

Example invoice using the levy feature.

On the draft invoice details screen, use the drop-down list in the Levy column to select the levy type. Selecting a levy option for one or more lines generates an additional line at the end of an invoice with the additional levy fee. Please note that the fee does not form part of the profitability of the invoice and is not included in the phase allocations.

Draft invoice: D1190

Cups & Co inc | 3/TLEV1 | Advertising

Type: Invoice

Revenue balance: Deferred

Final:

Inv date: 10/07/2019

Order number:

Ready for approval

Created by: Mike Pender on 10/07/2019 at 2:14pm

Print | eMail | Make Real | Cancel | Save & Close

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

Actions: Add | Copy | Delete

Description	Quantity	Unit price	Net total	VAT	VAT amount	Gross total	Levy	Style
Various work	0	0.0000	500.00	1 (UK 2...)	100.00	600.00		B i U
Advertising	0	0.0000	1000.00	1 (UK 2...)	200.00	1200.00	ASBOF	B i U
ASBOF	0	0.0000	1.00	0 (UK 0...)	0.00	1.00	ASBOF	B i U
Totals			1501.00		300.00	1801.00		

(INVOICING CONTINUED ...)

Revenue recognition based on ticked-off costs

'Recognise using tick-off charge values' is a new option on an invoice's 'Phase allocations' tab.

If selected, the system looks at the total recommended charge value of ticked-off costs and uses this value as the 'Recognise now' figure. Any balance for the invoice is deferred.

Example

In this example, the invoice is for £500 and the associated (ticked-off) costs total is £421.

Clicking the option 'Recognise using tick-off charge values', automatically recognises the £421 and leaves the balance of the invoice (£79) deferred.

Draft invoice: D1056 Print

Southern Belle 3/00001012.001 Artwork

Type: Invoice
Revenue balance: Deferred
Final:
Inv date: 31/07/2019
Order number: 2232

Ready for approval
Created by: Mike Notpalmer on 26/01/2018 at 1:07pm
WARNING: Phase has a status of Quote

Job Phase	Description	PT	C	Already recognised	Recognise now	Total recognised	Total billed	Deferred now
3/00001012.001	Artwork	ENG		2386.07	421.00	2807.07	500.00	79.00
				Value	£421.00	£2,807.07	£500.00	£79.00
				Total target value			£500.00	
				Difference			£0.00	

Auto allocate

Cost Actual
 Charge Estimate
 Tickoff

Auto
Recognise all
Defer all
Recognise using tick-off charge values

(INVOICING CONTINUED ...)

Calculator on the Draft invoice Financial tab

The calculator is used to input figures to help visualise adjustments made to:

- Invoice total
- Gross profit
- Net profit

The numbers changed are not permanent and do not alter the actual draft invoice.

To access the calculator:

- Select 'Draft invoices' in the main menu
- Open a draft invoice in the list
- Choose the 'Financial' tab
- Locate the calculator in the 'This transaction' panel on the right-hand side of the screen

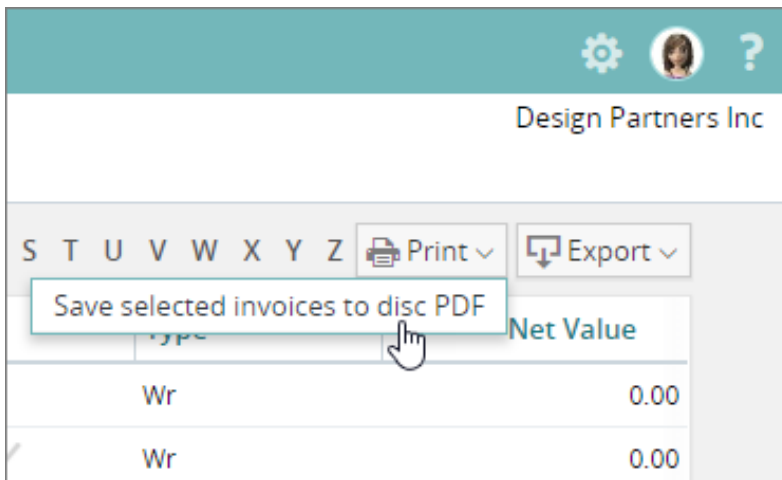
This transaction				
			Calculator	
Invoice total	£1,010.00		<input type="text" value="1200"/>	
Time costs	£233.34			
Material costs	£0.00			
Purchase costs	£500.00			
Total costs	£733.34			
Gross profit	£510.00	50.50%	<input type="text" value="700"/>	58.33%
Net profit	£276.66	27.39%	<input type="text" value="466.659999"/>	38.89%

Batch printing invoices and draft invoices (Multiple PDFs)

This new feature enables the batch printing of multiple PDFs for invoices and draft invoices.

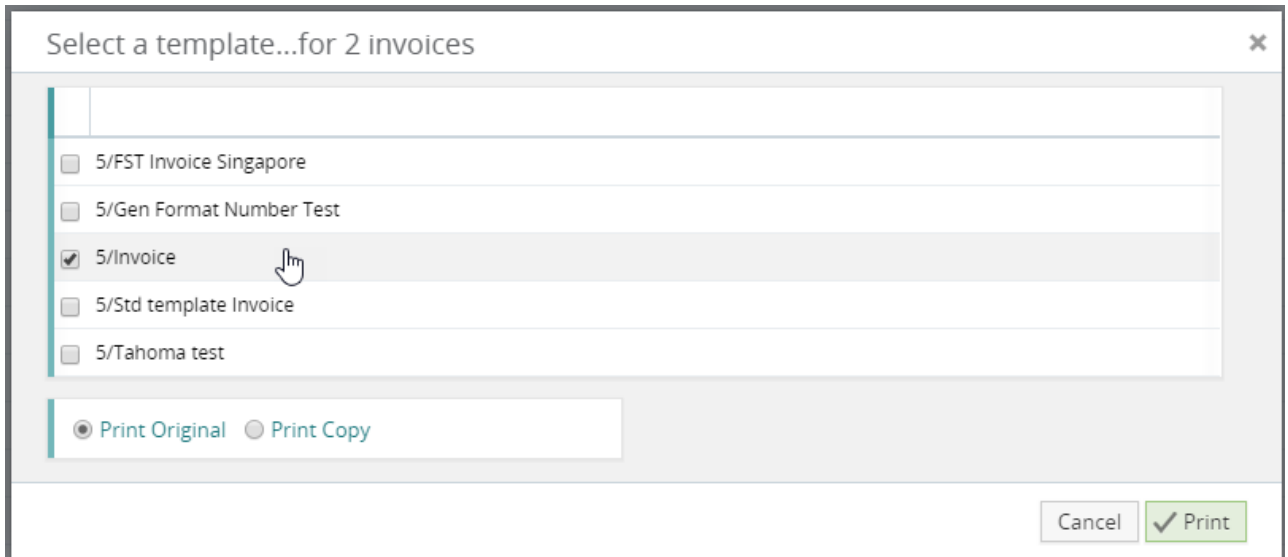
To access the batch printing feature:

- Select 'Invoices' or 'Draft invoices' in the main menu
- Use the tick boxes to select the required invoices for batch printing
- Click the 'Print' button towards the top right-hand corner of the screen
- Choose 'Save selected invoices to disc PDF'




The resulting pop-up window:




- Indicates how many invoices have been selected
- Displays a list of available templates of which one must be selected
- Gives an option to choose either 'Print original' or 'Print copy'



Invoice has clickable links to client and job

When editing a draft invoice, this feature enables the user to open the related client or job in a new tab while keeping the invoice open.

 **Invoice: 8500126**

 London eye  3/00001008  Mike - Special Campaign Launch

Type Invoice

Revenue balance Deferred

Final

Inv date 31/01/2019

Order number


Invoice allocated costs - Enhancements




Opening the 'Allocated costs' tab of an invoice, users can select costs to associate with an invoice. This makes it possible to accurately report on profit by both invoice and period.

This feature has been enhanced to include the following features:

- Option to write off a cost
- Option to filter the unticked costs by date
- Option to sort by column header

Allocated costs screen

 **Draft invoice: D1188** Make Real Cancel Save & Close

 Southern Belle  3/00001012.001  Artwork

Type Revenue Recognition


Revenue balance Deferred

Final

Inv date 10/07/2019

Order number

Ready for approval

Created by  Mike Pender on 10/07/2019 at 1:49pm

Jobs/Phases invoiced **Allocated costs** Financial Accounts analysis Notes Phase allocations

Time 2 Materials Purchases 3

Actions Unticked

Bill	W/O	Job & Phase	Charge code	Staff	Date	Work done	Hours	Cost	Charge
<input type="checkbox"/>	<input checked="" type="checkbox"/>	3/00001012.001	Rail Engineer 1(...	Mike Pender	13/04/2018		0.050	5.00	3.50
<input checked="" type="checkbox"/>	<input type="checkbox"/>	3/00001012.001	Rail Engineer 1(...	Mike Pender	14/04/2018		0.050	5.00	3.50
<input checked="" type="checkbox"/>	<input type="checkbox"/>	3/00001012.001	Technical auth...	Mike Pender	28/06/2019		11.000	150.00	0.00
Time Totals (2)							11.050	155.00	3.50
Time W/O (1)							0.050	5.00	3.50
All Totals (2)								155.00	3.50
All W/O (1)								5.00	3.50

JOBS & PHASE

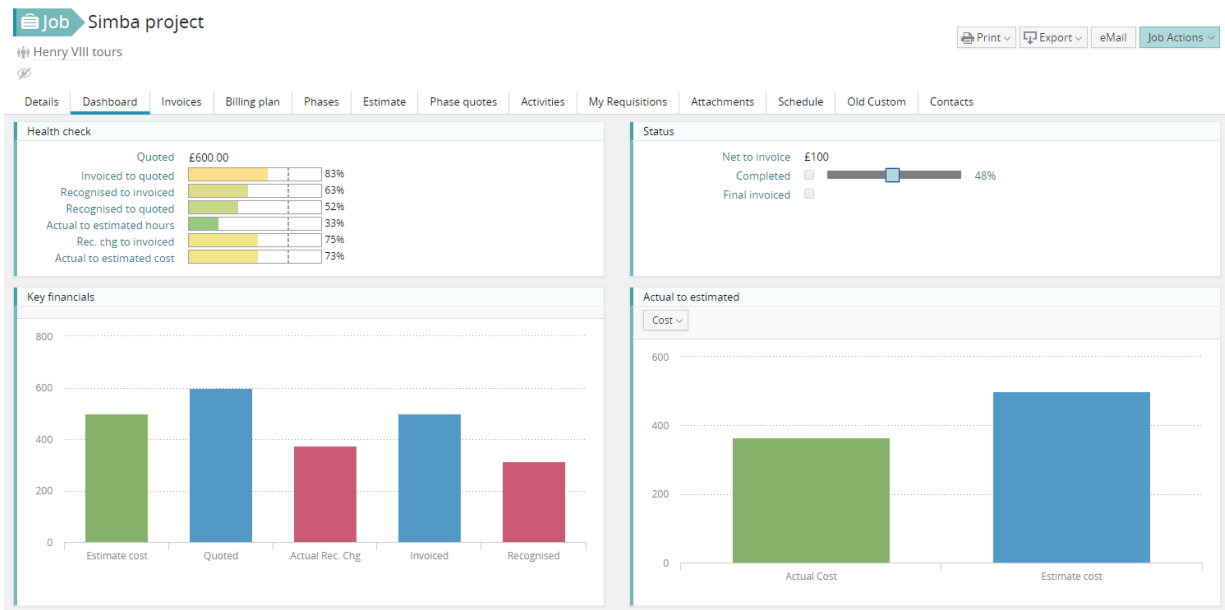
Job and phase financial tab - Enhancements

The financial tab of jobs and phases has been renamed to 'Dashboard'.

New charts have been added to the Dashboard:

- Key financials
- Actual to estimated

Main charts



Profit & costs / Recommended charge

Clearer view of this key data.

Profit & costs					Comparison to recommended charge		
	Quote v. estimate		Recognised v. actuals			Quote v. estimate	Invoiced v. actuals
Recognised	600.00		650.00		Invoiced	600.00	650.00
Purchases	220.00		0.00		Purchases	242.00	0.00
Gross profit	380.00	63%	650.00	100%	Time	151.00	1132.50
Time	27.78		750.00		Materials	54.00	0.00
Materials	45.00		0.00		Total	447.00	1132.50
Total costs	292.78		750.00		Difference	153.00	-482.50
Net profit	307.22	51%	-100.00	-15%			

(JOBS CONTINUED ...)

Completing a job

To mark a job or phase as complete, use the 'Actions' button rather than checking the 'completed' check box.

Billed and un-billed costs

The charts have been amended to show the 'Actual recommended charge' of the costs that have been billed. Previously, total estimated values were displayed.

Billed costs				
	Actual cost	Actual rec. charge	Rec. profit	Actual net profit
Purchase	200.00	220.00	20.00	
Time	50.00	40.00	-10.00	
Material	45.00	54.00	9.00	
Total	295.00	314.00	19.00	
Invoiced			500.00	205.00
Difference				-186.00

Additional chart - 'Value (to date)'

This chart only previously appeared if 'Bill by Time & Materials' was selected. The chart shows the value of the work done to date expressed as gross and net profit figures.

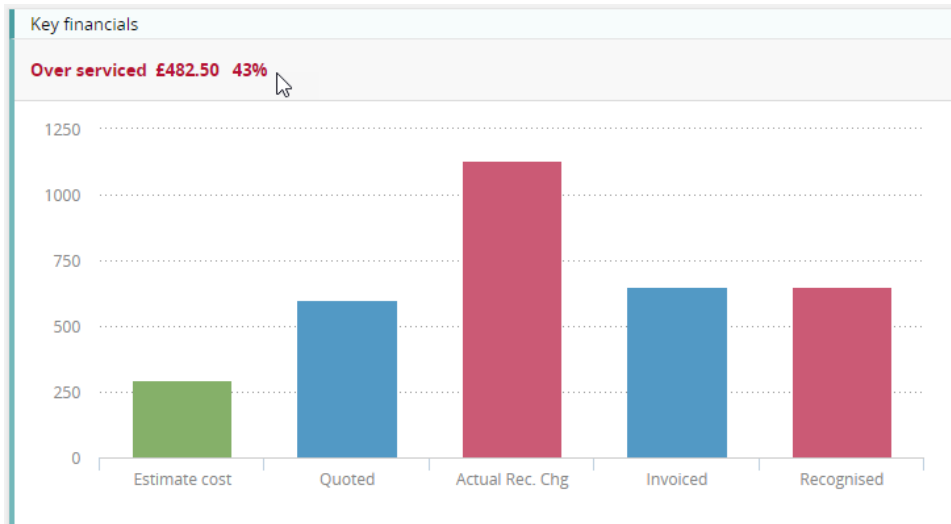
(JOBS CONTINUED ...)

Over / under serviced

Once a job has been closed (final invoiced), the system looks at the recommended charge for the work that has been done, including the recommended mark-up of purchases. The system then compares this to the Net value of what has been invoiced.

If the system finds the amount billed is less than the system recommends for the services provided, based on actual timesheets and not what was estimated, it clearly states this in the key financial panel.

Key financials



Note: If the total billed exceeds the system recommendation, the system shows a similar figure but in green, stating '**Over charged £x.xx xx%**'. It is highlighted in green because invoicing more than the recommended charge is generally advantageous to the business.

(JOBS CONTINUED ...)

Changing dates at job level – New company setting

If a system is set up with dates being controlled at phase or stage level, it is still possible to change the dates via the job's 'change dates' feature.

The aim of this feature is to make it easier to change all the dates on a job when the system has been set up to have the dates driven at a lower level, for example at phase or stage level.

Job card – details tab

The screenshot shows a 'Job card' interface with two main sections: 'Key dates' and 'People'. The 'Key dates' section contains a table with the following data:

Expected close	18/07/2019	Calendar icon	✖
Job start	01/07/2019	Time	1:08pm
Job due	01/07/2019	Time	

Below the table is a 'Change dates' button with a calendar icon. A tooltip below the button reads: 'Set all start / due dates on this job, its phases and its stages'. The 'People' section on the right lists 'Contact', 'Project lead', and 'My Team'.

Company settings – Advanced tab

To control whether the 'Change dates' button is seen or hidden in the program:

- Navigate to 'Company' settings
- Select the appropriate company
- Click on the 'Advanced' tab
- Locate the box labelled 'Disable option to change dates at a higher level'
- Tick the box to hide the 'Change dates' button on the job details tab or untick the box to display them.

The screenshot shows the 'Date controls' section in the 'Advanced' tab of company settings. It contains the following elements:

- 'Date controls' dropdown menu with the selected option: 'Stage driven - estimate dates not enterable and always reflect stage dates...'
- 'Applies to' dropdown menu with the selected option: 'All jobs'
- A checkbox labeled 'Disable option to change dates at a higher level' which is currently checked.

(JOBS CONTINUED ...)

Copying a quote from another job

To save time and utilise existing quotes, it is now possible to copy a quote from another job. To access this feature:

- Select 'Phases' in the main menu
- Open a phase in the 'Phase list'
- Choose the 'Quote' tab
- Click the 'Actions' button
- Select 'Copy from another job'
- Choose a phase from the 'Phase picker' window

Phase picker

Views

Client	Job phase	Project lead	Complete	Description
Northern Utilities PLC	50028.001	Alan Hammond		
Aristech	50030.001			
Alcoa	50031.001			
Tax & co	1600021.002	Mike Pender		Website overhaul
ZZ Acme company	1600025.001	Nassouh Kabbani		ITV Ad - concept
Enterprise Trust	au00565.001	Rob Shearer		Display artwork
Enterprise Trust	au00565.002	Rob Shearer		Design
Enterprise Trust	au00565.003	Rob Shearer		Print

The selected phase quotes are copied to the current quote and all the fields are editable.

Build quote | Actions | Quote date 00/00/00

Description	Quantity	Unit price	% Discount	Value	Style
<input type="checkbox"/> Client Services	1	35.0000	0.00	35.00	<input type="button" value="B"/> <input type="button" value="i"/> <input type="button" value="u"/> <input type="button" value="list"/> <input type="button" value="reset"/>
<input type="checkbox"/> Miscellaneous	1.5	8.0000	0.00	12.00	<input type="button" value="B"/> <input type="button" value="i"/> <input type="button" value="u"/> <input type="button" value="list"/> <input type="button" value="reset"/>
Billable Total				£47.00	
Client investment				£0.00	
Net estimated profit				100%	
Gross estimated profit				100%	

(JOBS CONTINUED ...)

Copy phase from another job / template

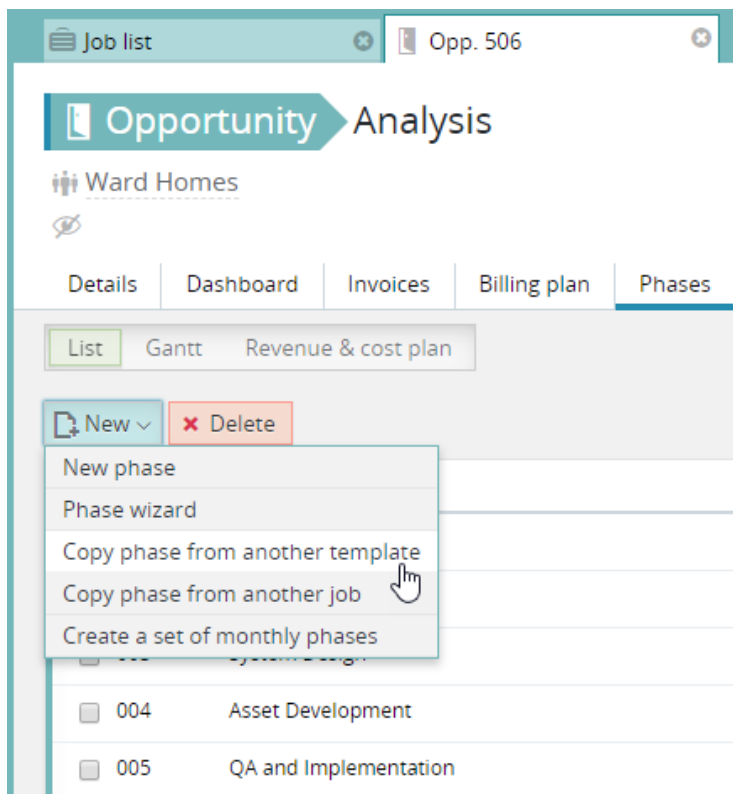
When viewing the 'Phases' tab of a 'Job' or 'Opportunity', there are two new functions which copy phases and add them to the phase list:

- Copy phase from another template
- Copy phase from another job

To access these new features:

- Select 'Job' or 'Opportunity' from the main menu
- Open a job or opportunity from the list
- Click the 'Phases' tab
- Press the 'New' button
- Choose 'Copy phase from another template' or 'Copy phase from another job'.

Copy phase from another template:



(JOBS CONTINUED ...)

Selecting 'Copy phase from another template' opens a pop-up window with 3 main panels:

- Base upon
- Select which phases to copy
- Options

Phase	Description
<input checked="" type="checkbox"/> 001	Quoting phase
<input checked="" type="checkbox"/> 002	Production phase

Base upon:

The default setting for the 'Base upon' template field is '-Blank-'.

Use the drop-down menu to select a template. Only one template may be selected.

Select which phases to copy:

The list of phases to copy depends on the template job chosen. Select one or more phases by clicking in the appropriate tick boxes.

Options:

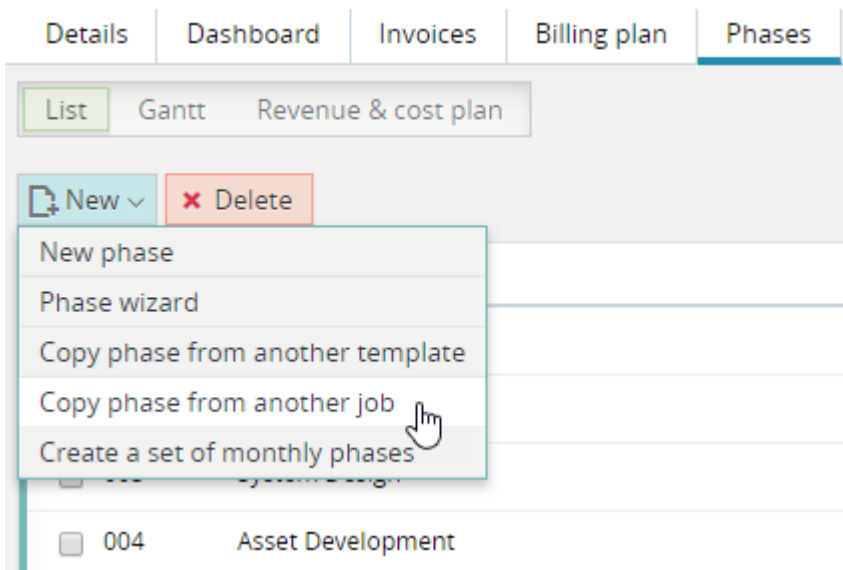
Similar to when creating a job, the 'Options' panel gives an opportunity to choose which elements of the selected phase(s) need to be copied.

<input type="checkbox"/> Status	<input type="checkbox"/> Time
<input type="checkbox"/> Billing plans	<input checked="" type="checkbox"/> Material
<input type="checkbox"/> Activities	<input checked="" type="checkbox"/> Purchase
<input checked="" type="checkbox"/> Phase quotes	<input type="checkbox"/> Use actual values
<input checked="" type="checkbox"/> Stages	

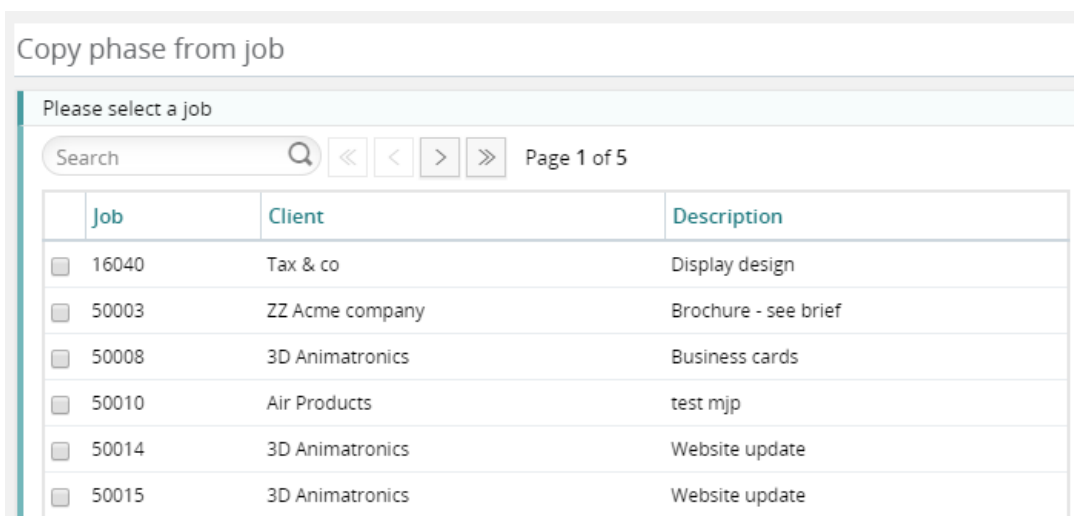
Click 'Create' for the newly copied phase(s) to be added to the list of phases. The new phase description(s) are the same as those of the copied phase(s).

(JOBS CONTINUED ...)

Copy phase from another Job

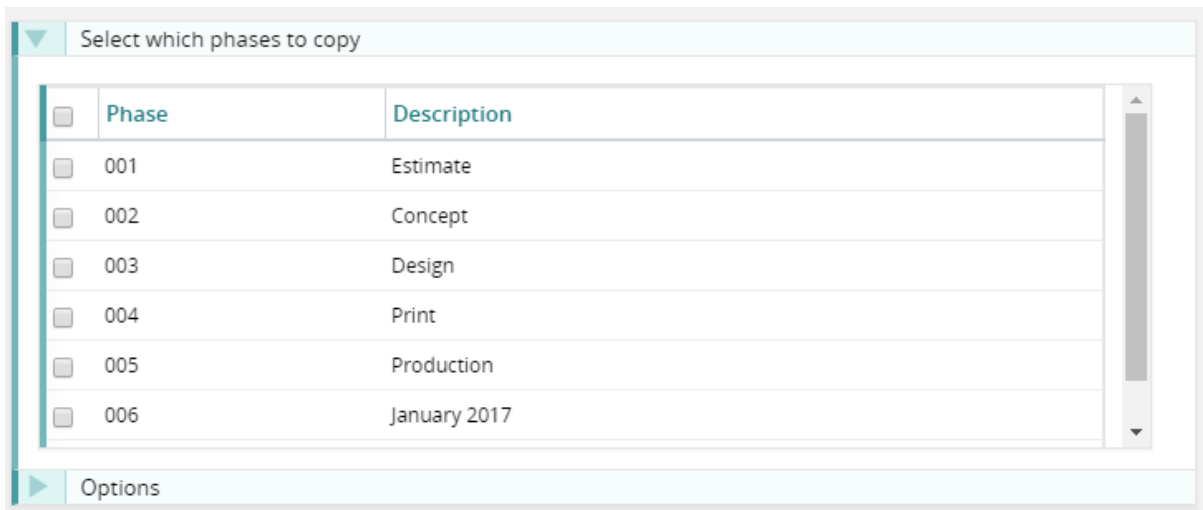


Selecting 'Copy phase from another job' opens a pop-up window. From the list of jobs on the left-hand side of the window, only one job may be selected.

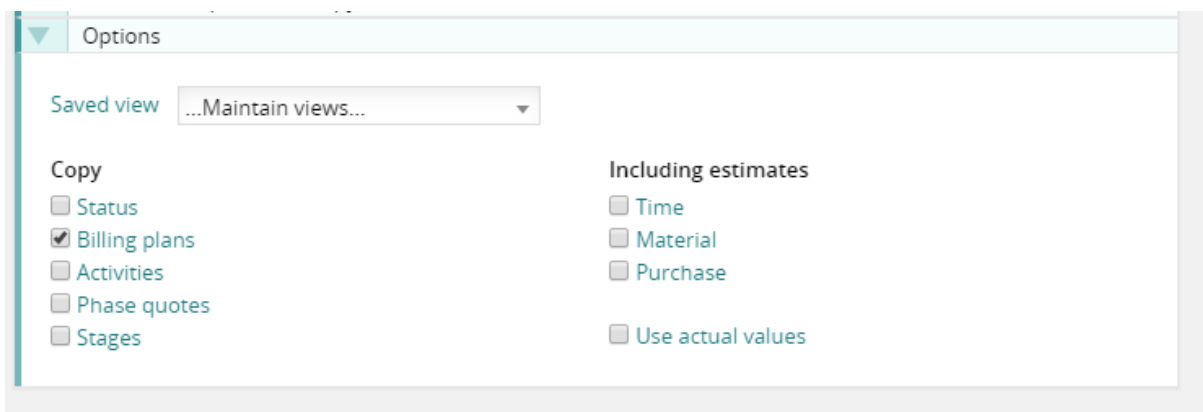


(JOBS CONTINUED ...)

On the right-hand side of the window, in the 'Select which phases to copy' panel, select one or more phases for copying. Depending on the job selected, different phases appear in the list.



The 'Options' panel is the same as when copying a phase from another template, giving an opportunity to choose which elements of the selected phase(s) to copy.



Click 'Create' for the newly copied phase(s) to be added to the list of phases. The new phase description(s) are the same as those of the copied phase(s).

Changing job currency and exchange rate

Enhancements have been made to the existing feature, enabling changes to be made to the currency rate without having to re-select the currency.

To access this feature:

- Select 'Jobs' in the main menu
- Open a job
- Click the 'Details' tab
- Scroll down to the 'Sales info' panel

Value		
Quoted	£15.70	AED235.49
Order no		
VAT	1 (UK 20%) Standard	
Currency	Dirhams	
Rate	15.0000	
Latest rate (FM)	12.7400	
Use		
Bill by	Quote/Estimate	

The 'Latest rate (FM)' only displays if there has been a change in exchange rates. To use the 'Latest rate (FM)', click on the adjacent 'Use' button and the 'Job currency change' window opens.

The 'Job currency change' window also opens when changes are made to the 'Currency' field or 'Rate' field.

Job currency change

Update the Dirhams charge rate for this job

Current rate: 15.0000
New rate: 12.7400

Keep currency quote & estimate
This option will retain the value of any foreign currency quotes. However, base currency estimated charge rates and the base currency value of the quote may be adjusted.

Non-currency quote: £15.70 Adjusted non-currency quote £18.48

Adjust currency quote & currency estimate values
This will retain base currency charge rates set up for this job, but the value of any foreign currency quotes may be adjusted.

Currency quote: AED235.49 Adjusted currency quote AED200.02

Cancel OK

(JOBS CONTINUED ...)

There are two options in the 'Job currency change' window:

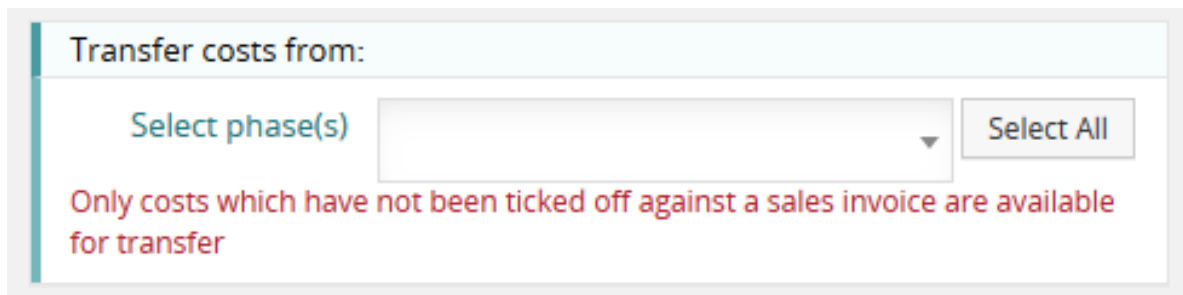
- **Keep currency quote & estimate**
This option retains the value of any foreign currency quotes, adjusting the base currency estimated charge rates and the base currency value of the quote
- **Adjust currency quote & currency estimate values**
This option retains base currency charge rates set up for the job, but the value of any foreign currency quotes may be adjusted with the selected rate used in the calculations rather than the 'Latest rate (FM)'

Clicking 'Cancel' in the 'Job currency change window' – the 'Rate' or 'Currency' are restored to their original values.

Clicking 'OK' in the 'Job currency change window' - the 'Rate' or 'Currency' changes are updated and used for processing.

Allocated costs - Warning text

When transferring costs, a warning/info message has been added.



Transfer costs from:

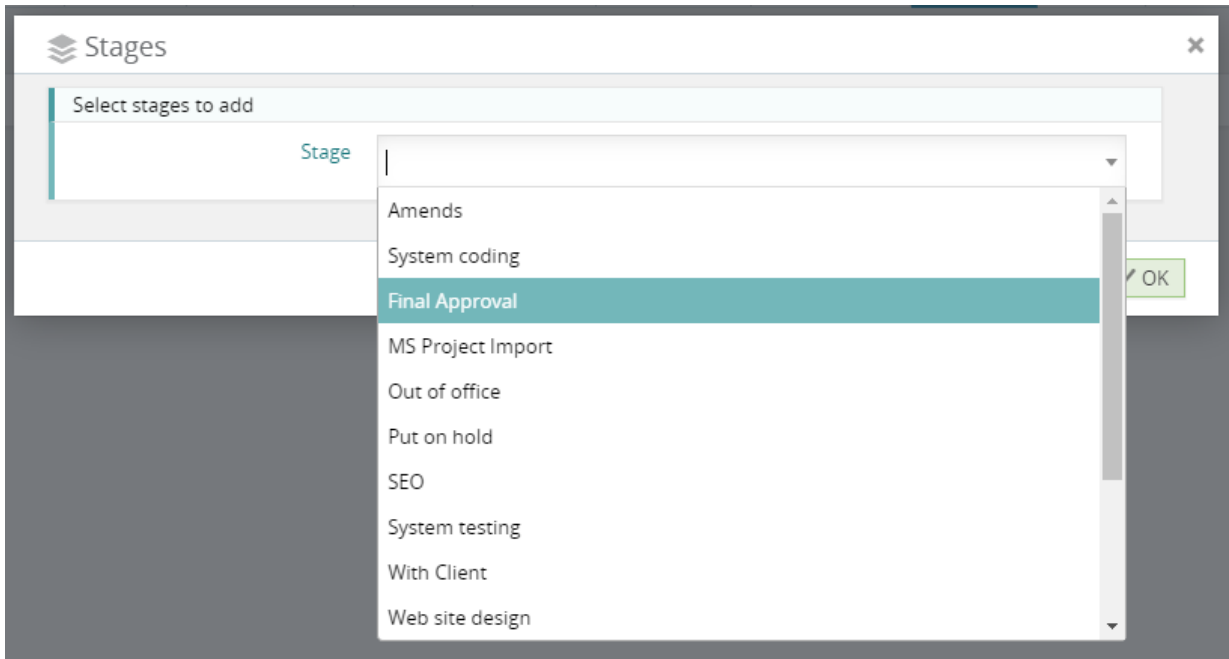
Select phase(s)

Only costs which have not been ticked off against a sales invoice are available for transfer

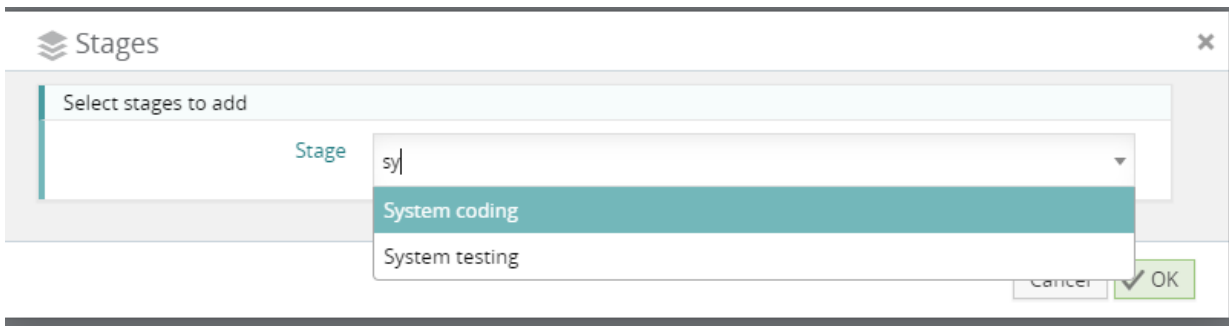
(JOBS CONTINUED ...)

Adding stages – Search filter

Stages can be added via the 'Schedule tab' in Jobs, Opportunities and Phases. Clicking the 'New' or 'Add stage' buttons opens a pop-up window. Click the 'Stage' field to view the complete list of stages.



To filter the list, type in some key characters in the stage selection field.



(JOBS CONTINUED ...)

Projects – Display billing plans

The project input form now provides a view of all billing plans on a project.

Note: The new multi-job billing plan feature also enables the user to see billing plans sorted by project.

Project: BP Cancel Save & Close

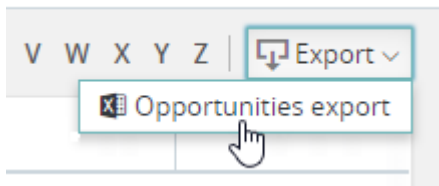
Details Campaigns Jobs Phases **Billing Plans**

Job/Phase	Client	Description	Month	Year	%	Planned value	Recognise	Notional costs	Profit forecast	% Wgt	Billed	Invoice
16/1600032.001	Ace Electronics	TV Campaign - laptops and mice	April	2019	100.00%	70.00	70.00	0.00	70.00	0.00%	0	
16/1600032.002	Ace Electronics	TV Campaign - laptops and mice	July	2019	45.00%	50.63	50.63	0.00	50.63	0.00%	0	
16/1600032.002	Ace Electronics	TV Campaign - laptops and mice	July	2019	55.00%	61.88	61.88	0.00	61.88	0.00%	0	

Opportunities export- Job comments added

Job comments are included in an exported opportunities spreadsheet. To view:

- Select 'Opportunities' in the main menu
- Highlight the tick box for the required opportunity
- Click the 'Export' button in the top right-hand corner of the screen
- Choose 'Opportunities export'

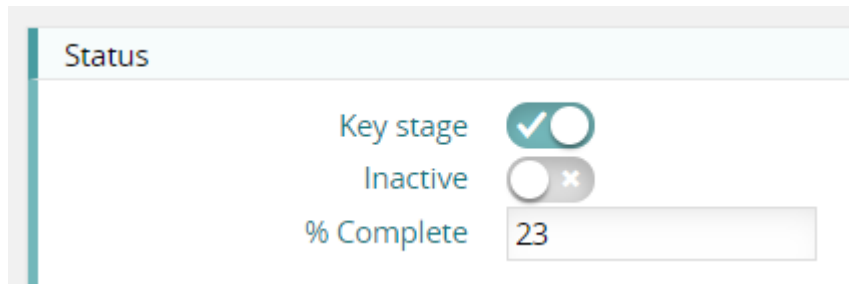


- Open the newly generated spreadsheet and locate the 'Comments' column

(JOBS CONTINUED ...)

Move stage dates

A key stage is set by opening a stage and moving the key stage toggle.



Identifying the key stage in a schedule

The key stage is identifiable by a tick in the 'Key' column.

Details	Dashboard	Invoices	Billing plan	Phases	Estimate	Phase quotes	Activities	My Requisitions
Stage actions <input type="button" value="Delete"/>								
Key	Seq	Description	Start date	End date	Done	Date		
<input type="checkbox"/>	001-1	Proofing	19/07/2019	23/07/2019	00/00/0000	00/00/0000		
<input checked="" type="checkbox"/>	001-2	Estimate Stage	01/08/2019	02/08/2019	00/00/0000	00/00/0000		
<input type="checkbox"/>	001-3	Ready for invoicing	02/04/2019	02/04/2019	00/00/0000	00/00/0000		

Using the key stage

A 'Key stage' acts like a marker amongst a list of stages and is helpful when having to reschedule stages on a job. Other stages in the list are linked to the key stage and if the date of the key stage changes, other stage dates change, too. There can only be one key stage at any time. For example, if a key stage is set to 'Client approval' and for some reason the approval procedure is delayed, the user may want to move all the dates for subsequent stages.

Move stage dates

The 'Move stage dates' feature is located on the 'Actions' menu within the 'Schedule' tab.


Details	Dashboard	Invoices	Billing plan	Time	Materials	Purch & exp.	Estimate	Quote	Activities	My Requisitions	Attachments	Schedule
Old Custom Contacts												
Actions <input type="button" value="Add stage"/> <input type="button" value="Delete"/>												
Move picked up		Description	Start date	End date	Done	Date	Comment	Duration	Assigned	Estimates/Costs		
Move picked down		Proofing	19/07/2019	23/07/2019	00/00/0000			3		Include	▼	Insert
Complete selected		Estimate Stage	01/08/2019	02/08/2019	00/00/0000			2		Include	▼	Insert
UnComplete selected		Ready for invoicing	02/04/2019	02/04/2019	00/00/0000			1		Include	▼	Insert
Move stage dates												

(JOBS CONTINUED ...)

Options when moving dates

A new date for the key stage is entered and which stages to move are selected.

New start date for key Stage ✕

Date 

Move all stages

Only move stages prior to the key stage

Only move stages following the key stage

(JOBS CONTINUED ...)

Drag and drop – Ordering of phases

From within the phases tab of a job, it is now possible to drag and drop the phases in the list to re-order them.

The screenshot shows the 'Phases' tab for a job titled 'Re-branding project' under 'Wakefield MDC'. The interface includes navigation tabs (Details, Dashboard, Invoices, Billing plan, Phases, Estimate, Phase quotes, Activities, Requisitions, Attachments, Schedule, Special) and sub-tabs (List, Gantt, Revenue & cost plan). A table lists the phases with columns for Phase ID, Description, Type, Comp., and % Comp. A mouse cursor is shown dragging phase 002 to a position above phase 005.

Phase	Description	Type	Comp.	% Comp.
001	Re-branding project	CON	✓	2.2%
003	Expenses	EXP		0%
002	Estimate	EST		0%
005	Materials	MAT		0%
004	Maintenance contract	MAI		0%

Next Phase: 6

Total phases: 5 Completed: 1 Incomplete: 4 Final invoiced: 1 Non-final invoiced: 4

Creating a view – Jobs with no associated invoices

New filters have been added to the Jobs list filter, giving the ability to filter jobs that have/don't have draft or real invoices.

New filter options

Invoices

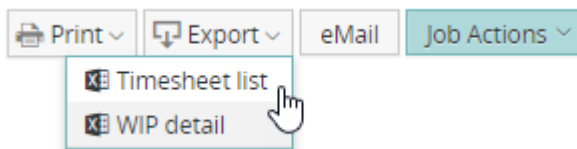
Has invoices Has no invoices

Draft invoices

Has draft invoices Has no draft invoices

Timesheet list export

This feature is available from the job and phase input forms.



KANBAN BOARDS

Work tickets v Requisitions

A requisition is typically a request by an account handler for some work to be scheduled on one of their jobs. The requisition is then picked up by the traffic manager in the 'Calendar bookings' module.

In this release, requisitions can be used as work tickets. The tickets appear on Kanban boards and can either be pre-allocated to staff resources or left unallocated, with staff encouraged to self-assign the tickets. Optionally, the tickets can appear in Calendars (using the owner's name) and timesheets can be created within the work ticket itself. To support this way of working, the Kanban board now shows the charge code description of any work requested using the requisition.

Activities kanban | Calendar bookings

Kanban Board - Requisitions

Views | New | Search | List | Kanban

Work tickets

TO DO

Mike Pender 8059

Junior Design
see spec attached
Requisition - Junior Design
09/07/2019 8:00 AM - 11/07/2019 8:30 PM
Ace Electronics
X00JOB2 Brochure re-design

1 6 High

IN PROGRESS

Mike Pender 8556

Creative Design
see spec
Requisition - Creative Design
08/07/2019 9:00 AM - 10/07/2019 10:00 AM
Ace Electronics
X00JOB2 Brochure re-design

4 Low

(KANBAN CONTINUED ...)

Layout and features of Kanban cards

Improvements to Kanban cards include:

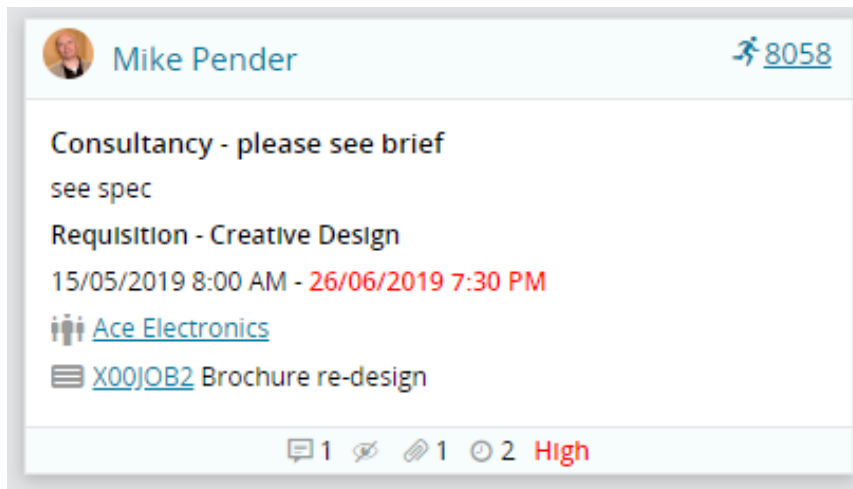
- Being more compact
- Displaying charge codes for requisitions
- Status section in the footer area

The status section in the footer area includes:



- The number of checklist items complete
- The number of comments
- Whether the user is a watcher
- The number of attachments
- The number of hours requested
- Priority - hidden if priority is 'medium'

New card layout



(KANBAN CONTINUED ...)

Colours for Kanban statuses

Kanban status colours can be set up in File Maintenance > Kanban statuses List

Design Partners Inc

Kanban statuses List

<input type="checkbox"/>	Entitytype	Status code	Status desc	Inactive	Default	Order	Action	Colour
<input type="checkbox"/>	Activities	TODO	To do		<input checked="" type="checkbox"/>	1	Uncomplete	
<input type="checkbox"/>	Activities	INPR	In progress			2	Uncomplete	
<input type="checkbox"/>	Activities	STL	Stalled			3	Uncomplete	
<input type="checkbox"/>	Activities	TST	Testing			4	Uncomplete	
<input type="checkbox"/>	Activities	QA	QA			5	Uncomplete	
<input type="checkbox"/>	Activities	COMP	Done			6	Complete	
<input type="checkbox"/>	Activities	HK	Hide			9	Uncomplete	

1-7 of 7

Kanban board

The selected colours underline the column headings on Kanban boards.

Kanban Board - Requisitions

Views Search

Work tickets

TO DO

Mike Pender [8058](#)

Consultancy - please see brief
see spec
Requisition - Creative Design
15/05/2019 8:00 AM - 26/06/2019 7:30 PM
[Ace Electronics](#)
[X0010B2](#) Brochure re-design
1 1 2 High

IN PROGRESS

Mike Pender [8556](#)

Creative Design
see spec
Requisition - Creative Design
08/07/2019 9:00 AM - 08/07/2019 10:00 AM
[Ace Electronics](#)
[X0010B2](#) Brochure re-design
4 Low

QA

(KANBAN CONTINUED ...)

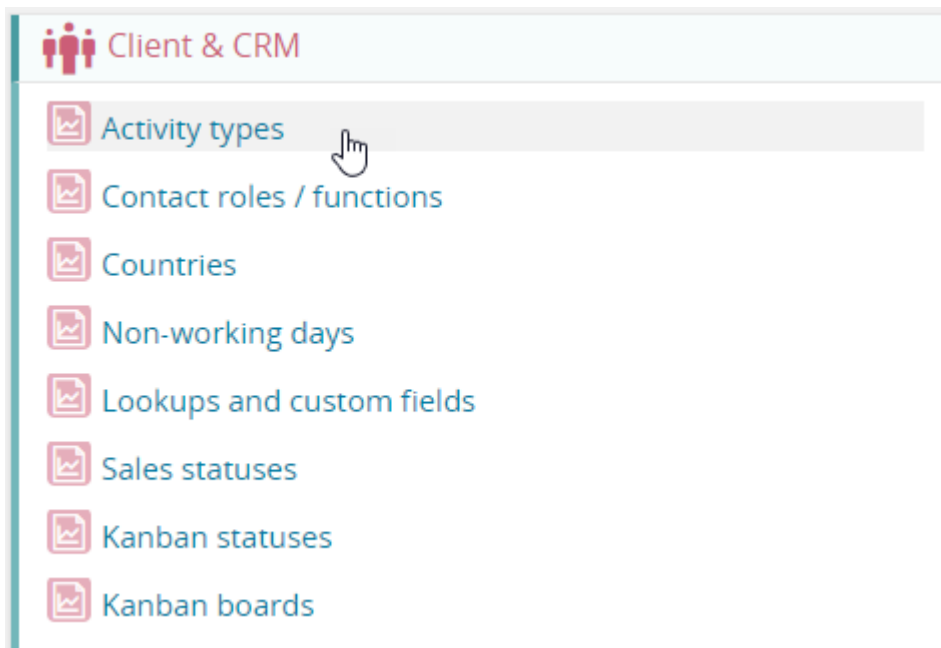
Restrict the use of Kanban to certain activity types

The 'Activities list' can be viewed in either 'List' or 'Kanban' mode. Items viewable in 'List' mode may be hidden in 'Kanban' viewing mode.

Managing Kanban view settings

By default, all activity types are viewable on Kanban boards. In some circumstances there may be activity types, such as phone calls, that users may not wish to view. To restrict or allow the viewing status of activity types on Kanban boards:

- Navigate to 'Settings'
- Select 'File Maintenance'
- Locate the 'Client & CRM' panel
- Click 'Activity types'



(KANBAN CONTINUED ...)

In the 'Activity types List', locate and select the activity for hiding / displaying in Kanban view.

<input type="checkbox"/>	Code	Description	Category
<input type="checkbox"/>	SP	Special type	Task
<input type="checkbox"/>	TODO	Task	Task
<input type="checkbox"/>	MAIL	Email	Email
<input type="checkbox"/>	MEET	Meeting	Meeting
<input type="checkbox"/>	CALL	Phone call	Phone Call
<input type="checkbox"/>	REQU	Requisition	Requisition

Select the 'Allow on kanban boards' tick box to display the activity on Kanban boards. Deselect to hide the activity on Kanban boards.

Misc

Display order

- Active
- Immediate alert on by default
- Completion alert on by default
- Allow on kanban boards

PURCHASING

Consolidated purchase orders

The 'Consolidate Purchase Orders' function enables two or more estimates with the same supplier to be combined.

Please note:

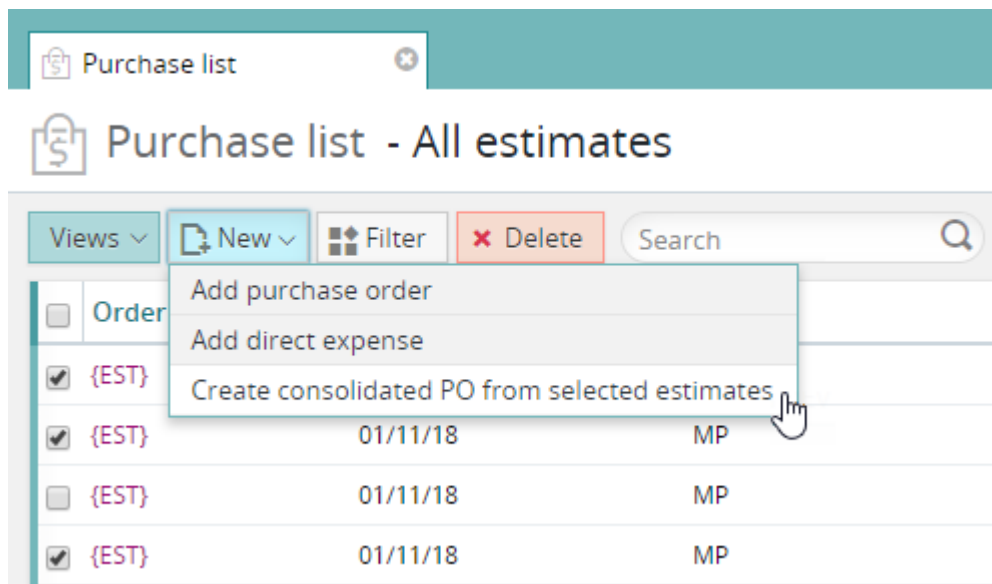
- All estimates which are used to create a consolidated PO are converted into POs and share the same PO number as the consolidated PO
- Newly created POs cannot be returned to their original estimate state
- POs and consolidated POs cannot be deleted

To create an estimate:

- Select 'Phases' in the main menu
- Open a phase in the 'Phase list'
- Click the 'Estimate' tab
- Ensure that the 'Full estimate' button is highlighted
- Select the 'New' button and choose 'Add a purchase'
- Follow the steps to assign a supplier
- Complete any required fields in the Purchase Estimate > 'Details' tab
- Click 'Save & Close'

To create a consolidated purchase order:

- Select 'Purchase orders' in the main menu
- The 'Purchase list' contains all POs and estimates. Estimates in the list are identifiable by the abbreviation {EST}
- To only view estimates, click the 'Views' button and choose 'All estimates'
- Select two or more estimates with the same supplier
- Click the 'New' button and choose 'Create consolidated PO from selected estimates'



(PURCHASING CONTINUED ...)

The 'New Record: Purchases' screen opens automatically with the consolidated PO number displayed at the top of the page. The supplier's name is also displayed, acting as a hyperlink to the supplier's 'Details' screen.

The Consolidated purchase order screen contains two tabs:

- Details
- Invoices

Consolidated PO number: 000052

Supplier: Hammer & Co

Details | Invoices

Purchases	Cost	Charge
Subcontract Model Making	£100.00	£110.00
Subcontract Model Making	£200.00	£220.00
Total	£300.00	£330.00

Date ordered: 04/09/2019
Sent to supplier: Date sent: 05/09/2019
Delivery address (from 1st purchase):

Created by Mike Pender on 04/09/2019 at 12:32pm

The 'Details' tab:

- Individual purchase orders consolidated into a single PO are displayed on the left
- View other information including 'Date ordered', 'Date sent' and delivery details in the right-hand panel

The 'Invoices' tab:

- The Invoices tab lists purchase invoices that have been allocated to any of the purchase orders in the consolidated purchase order
- To create an invoice for the consolidated PO, select 'Purchase invoices' from the main menu

To view an existing consolidated PO:

All estimates which are used to create a consolidated PO are converted into POs and share the same PO number as the consolidated PO. To view an existing consolidated PO:

- Navigate to the 'Purchase list'
- Click the 'Views' button
- Select 'All purchase orders'
- Locate one of the POs used to create the consolidated PO
- Open the PO and click on the uniquely numbered 'Consolidated PO' button towards the top right of the screen.

Consolidated PO 012310

Print | Email | Cancel | Save & Close

(PURCHASING CONTINUED ...)

Cancelled purchase orders

There is improved support for cancelled purchase orders with regards to the 'actual recommended charge' total. These improvements include:

- Cancelling a PO now sets the PO charge out value to '0' and the markup/discount % to '-100%'
- Auto tick-off for sales invoices, flagging cancelled POs as written off rather than billed
- Cancelled POs being excluded from the job and phase estimate page. Estimate revisions also suppress showing cancelled POs if they were already cancelled when the revision was created

Hovers added to 'Purchasing' and 'Expenses' sections

Throughout the program, in all the main lists, pop-up text and windows containing helpful information appear when the cursor hovers over text. Hovers have been added in the following sections:

'Suppliers & Purchases' section:

- Supplier contact list
- Purchase orders list
- Purchase invoice list

'Time & Expenses' section:

- Timesheet approval list
- Expense list

Purchase invoice – Opening associated purchase orders

This feature opens a purchase order from the allocated/unallocated purchase orders list from within a purchase invoice.

Purchase invoice screen

Allocated purchase orders			
Job and phase	Order no	By	Description
16/1600004.003	000035	MP	Able Print Subcontract Model Making

New pop-up screen when creating a purchase invoice

After details of a purchase order have been entered and approved, the user may wish to create a purchase invoice for the order.

To access the 'New purchase invoice' window:

- Select 'Purchase orders' in the main menu
- Open an approved purchase order in the 'Purchase list'
- Choose the 'Invoices' tab
- Click the 'Add purchase invoice' link which is only visible if the purchase order is approved

Purchase invoices received [Add purchase invoice](#)

Clicking on the 'Add purchase invoice' link opens a new pop-up window 'New purchase invoice'. The window contains three main sections:

- **Details**
For inputting the 'PIR number' and 'Their ref'
- **Value**
For viewing the Gross, VAT and NET figures of the invoice
- **Dates**
For making changes to the Invoice date, Posting date and Due date

New purchase invoice ✕

Details

PIR number

Their ref

Value

Currency	US Dollars	
Exchange rate	<input type="text" value="2.00"/>	
Gross	\$2040.00	£1020.00
VAT	\$340.00	£170.00
Net	\$1700.00	£850.00

Dates

Invoice date

Posting

Due date

If the purchase supplier is 'Multi-currency', the purchase currency and domestic currency are both displayed. The 'Exchange rate' can be adjusted manually and the Gross, VAT and NET figures adjust accordingly.


Search purchase orders within a purchase invoice

Option to search for purchase orders when allocating purchase orders to a purchase invoice.

To use this function:

- Navigate to 'Purchase invoices' in the main menu
- Open an invoice in the 'Purchase invoice list'
- Click the 'Details' tab
- Locate the 'Available purchase orders' panel
- Use the search window function or scroll through the list of 'Available purchase orders'

Purchase invoice: 4454

PIR number 4454
Supplier ABC & Co - EUROPE 
Their ref


Details Analysis Notes Attachments

Value

Currency	Euros	
Exchange Rate	1.1500	
Gross	200.00	£173.91
VAT	0.00	£0.00
Net	€200.00	£173.91
Allocated	€0.00	
Unallocated	€200.00	

People

Entered by Mike Pender
Contact
Authoriser

Available purchase orders 

Order	Date	Description	Phase	Their ref
000046	28/06/19	Subcontract Web Design	16/1600040.001	

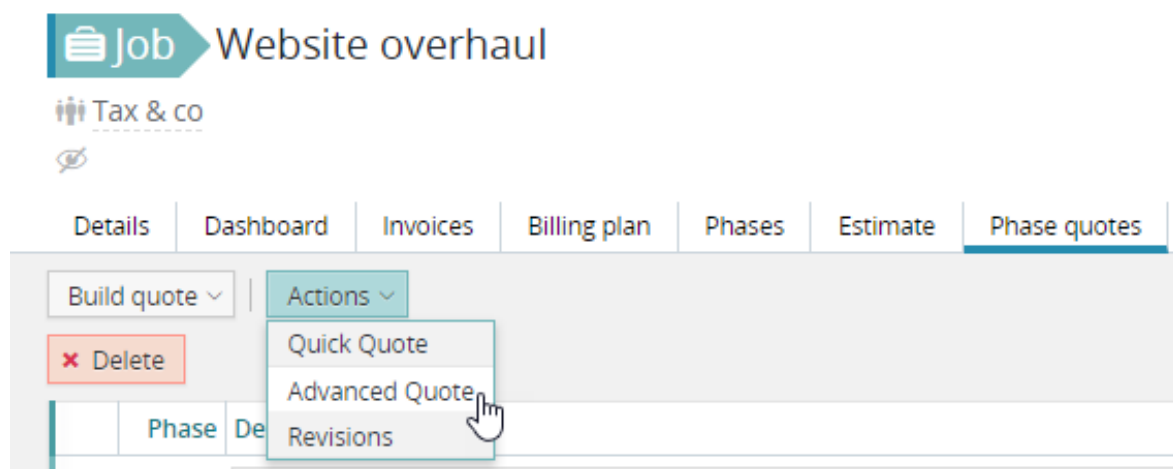
QUOTING

Roll-up in bold option

Option to 'Roll up details' when building a quote and have the phase description displayed in bold and italics.

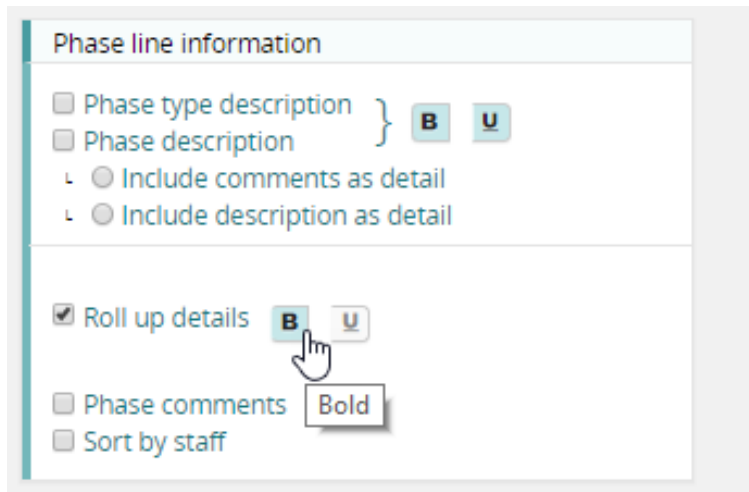
This feature is available in the Jobs, Phases and Opportunities areas of the program. To access the feature via the Jobs area:

- Navigate to 'Jobs' in the main menu
- Open a job in the 'Jobs list'
- Click the 'Phase quotes' tab
- Press the 'Actions' button
- Select 'Advanced Quote' from the drop-down list
- Locate the 'Phase line information' panel

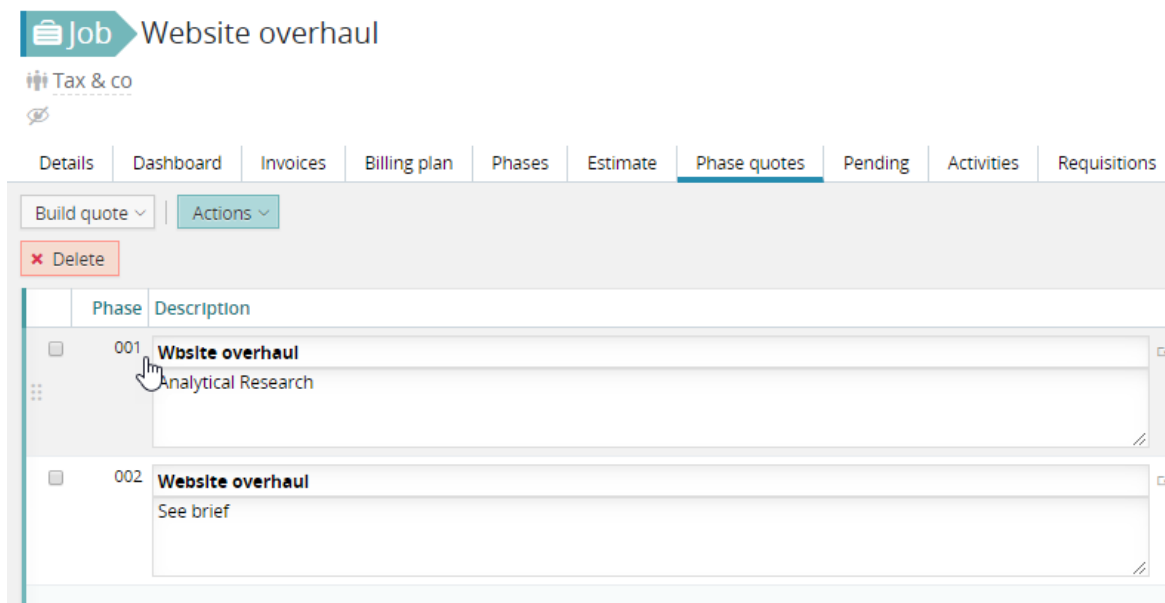


(QUOTING CONTINUED ...)

Bold and underline are now supported



Example quote



REPORTING

Custom and saved reports

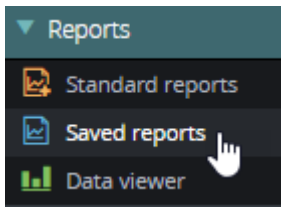
'Saved reports' has been renamed to 'Custom and saved reports'. Enhancements include Support of 'Custom reports' and filters.

Background

Custom reports are typically created by Synergist Support for Project Managers as a bespoke service. Custom reports can either be HM reports (PDF format) or manual reports (simple plain reports).

Synergist Support and/or Project Managers design reports according to requirements and provide default filters based on the data typically needed to locate them. The reports can be further filtered by users and saved as reports with new names. Super users can save such views as 'Company views' for all users to access. Other users can simply save as a person view for their own use. These report views appear under 'Saved reports'.

Access to 'Custom and saved reports' is via the 'Saved reports' link in the main menu.

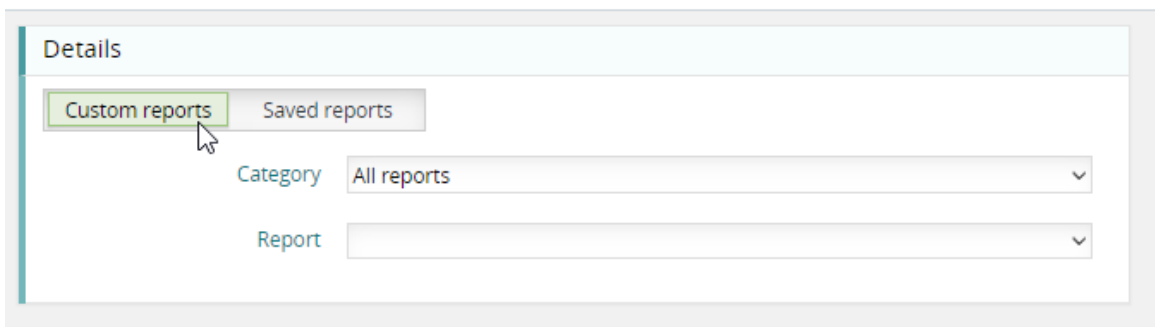


User interface

Clicking 'Saved reports' opens a new screen displaying two main options:

- Custom reports
- Saved reports

Custom and saved reports

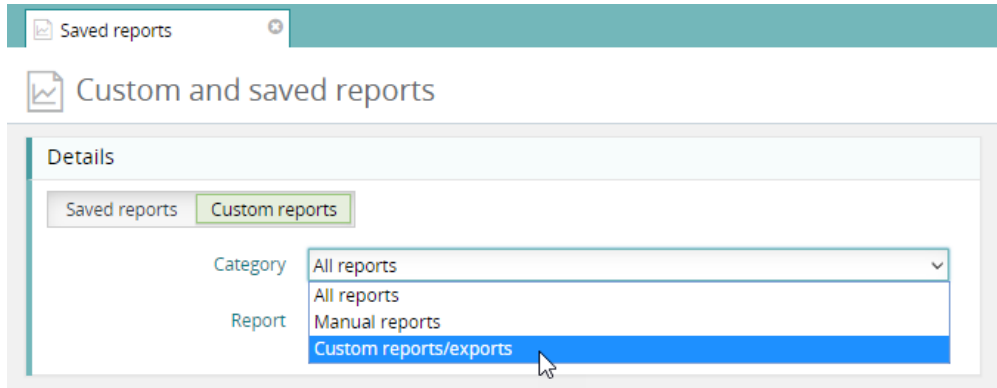


(REPORTING CONTINUED ...)

Custom reports

Select 'Custom reports' to see a list of any reports set up by Synergist Support or the Synergist Project Manager. Two different categories of reports are available:

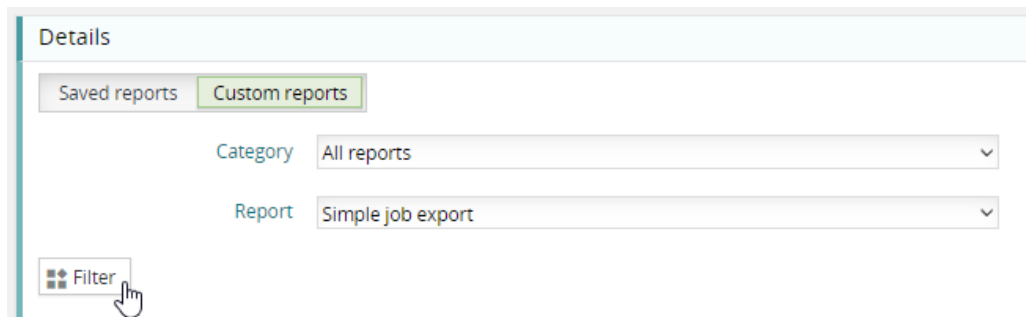
- Manual reports
- Custom reports/exports



If a custom report is installed on the user's system, the report can be run using its default settings. However, users may want to create and save new reports. To do this, click on the 'Filter' button, make any necessary changes and save the report with a new name (see below). On subsequent visits, the report is located in the 'Saved reports' section.

Filter button

On selecting a report, the user has all the usual options to run the report. However, there is also a 'Filter' button with advanced filtering features.



Please see below for examples of 'Filter' button use.

(REPORTING CONTINUED ...)

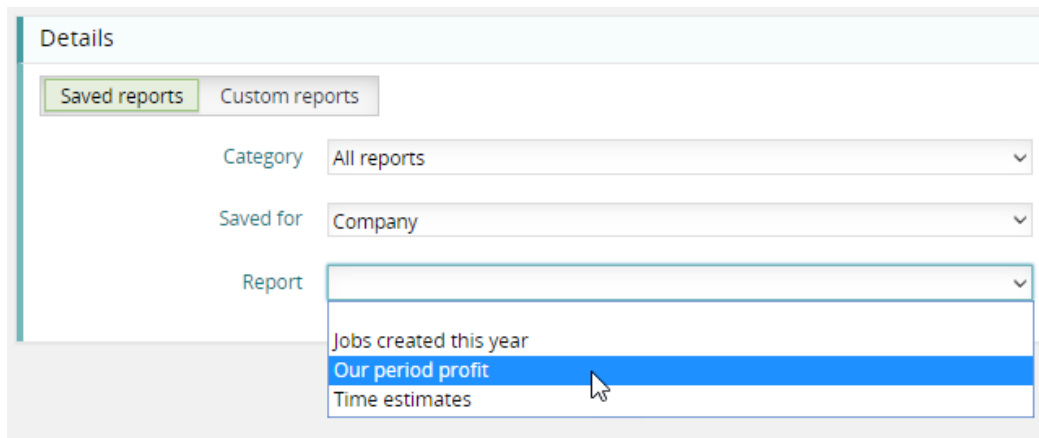
Saved reports

Saved reports are really **views** of existing standard reports and custom reports. Users can select a report, modify the default filter and save the view as a 'Saved report'. Saved reports appear under the 'Saved reports' heading.

'Saved reports' lists reports set up by the Synergist Project Manager or Synergist Support. Three different categories of reports are available:

- Manual reports
- Custom reports/exports
- Data viewer reports

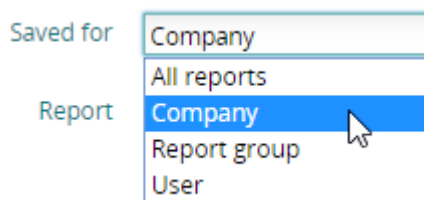
Note: 'Data viewer reports' do not have access to the Filter. All filters for 'Data Viewer reports' are accessed and saved via the data viewer module.



Saved for

The 'Saved for' drop-down menu enables users to filter the list of available reports with the following options:

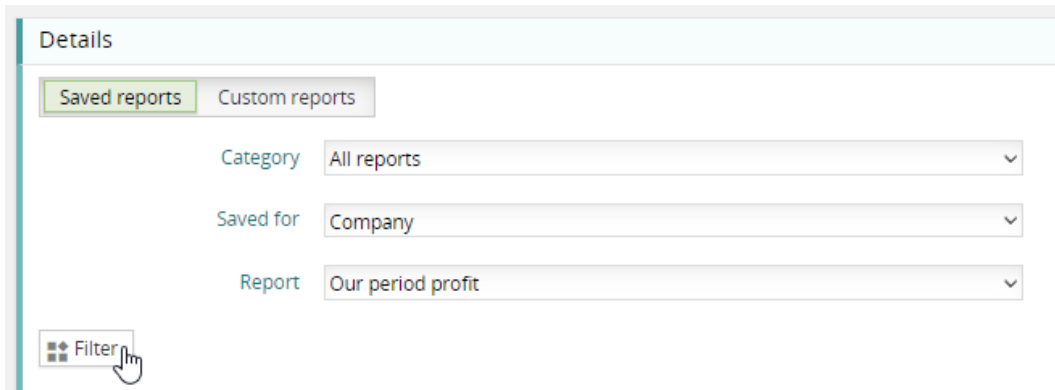
- All reports
- Company - Reports set up for the user by their system administrator
- Report group - User groups set up for the user
- User - Reports saved by the user



(REPORTING CONTINUED ...)

Filter button - refine report

On selecting a report, the user has all the usual options to run the report. However, there is also a filter button, giving access to the advanced filtering features.



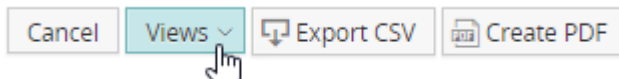
Refine report

On accessing the standard 'Refine report' screen, the report name is the name of the original custom report. Under this is the saved report name. This informs the user that they are currently running a saved version of the original custom report. The user may create as many of these variants as required.

The screenshot shows a software interface for refining a report. At the top, there is a teal header bar with a 'Saved reports' button. Below this, the main title is 'Reports: Period profit' with a sub-header 'Our period profit'. The interface is divided into two main sections: 'Date selection' and 'More filters'. The 'Date selection' section includes a 'Filter by date' checkbox (checked), a 'Dates' input field, and a 'Using Invoice date' label. Below this, there are 'From' and 'to' date pickers set to '01/08/2019' and '31/08/2019' respectively, with a 'Use pre-set date range' checkbox (unchecked). The 'More filters' section has a 'Show inactive options' checkbox (unchecked) and a list of filter categories: Company, Supplier, Client, Job & Phase, and Time, each with a right-pointing arrow.

Views

From the 'Refine report' screen, the user can run the report, modify the filter and run the report, or save any changes to the filter by clicking the 'Views' button.



In this example, a previously saved version of a report can be loaded, or the current filter saved in the usual way.

(REPORTING CONTINUED ...)

WIP Aged

Split WIP by cost type

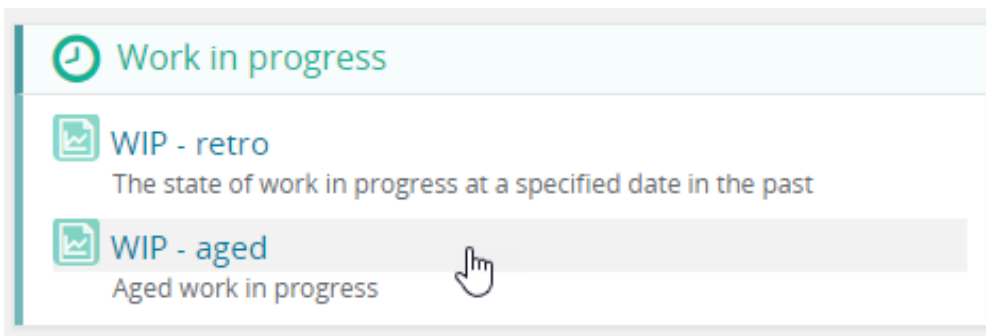
The WIP_Aged CSV file produces a spreadsheet with many column headers including:

- Current
- 30 Days
- 60 Days
- 90+ Days
- Total

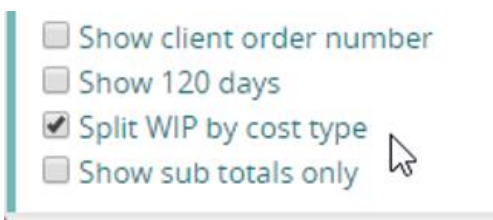
The 'Split WIP by cost type' feature creates extra columns in the WIP file that further break down existing columns into purchases, time (cost), time (hours) and materials (cost). In doing so, additional grouped columns are created in the spreadsheet.

To access this feature:

- Select 'Standard reports' in the main menu
- Locate the 'Work in progress' panel in the bottom right corner of the 'Reports' screen
- Click the 'WIP-aged' link



The 'Split WIP by cost type' feature is the penultimate tick box in the 'Options' panel.



(REPORTING CONTINUED ...)

Estimate v Actual

This export is now available as a PDF printout.

Example report

Enterprise Trust

Job number	Description	%	Est units	Act units	Est cost	Act cost	Est chg	Act chg
16/au00565	Redesign 1/tesd	0	8.00	0.00	32.00	0.00	64.00	0.00
16/au00565	Redesign Planning	11	3.00	3.30	0.00	0.00	225.00	247.50
16/au00565	Redesign Pre Sales	0	7.00	0.00	140.00	0.00	0.00	0.00
16/au00565	Redesign Rail Engineer 1	0	3.00	0.00	75.00	0.00	300.00	0.00
16/au00565	Redesign Scanning work	11	4.00	4.40	80.00	0.00	120.00	132.00
16/au00565	Redesign Senior Designer 2	-10	3.00	-3.00	60.00	-60.00	105.00	-105.00
Subtotal for 16/au00565		17	28.00	4.70	387.00	-60.00	814.00	274.50
Subtotal for Enterprise Trust		17	28.00	4.70	387.00	-60.00	814.00	274.50

Accounting Solutions for Business

Job number	Description	%	Est units	Act units	Est cost	Act cost	Est chg	Act chg
16/A050011	Website re-design Alter	0	5.00	0.00	20.00	0.00	350.00	0.00
16/A050011	Website re-design Client Services	12	15.00	18.00	180.00	360.00	525.00	630.00
16/A050011	Website re-design Planning	0	4.00	0.00	0.00	0.00	300.00	0.00
Subtotal for 16/A050011		75	24.00	18.00	200.00	360.00	1,175.00	630.00
Subtotal for Accounting Solutions for Business		44	24.00	18.00	200.00	360.00	1,175.00	630.00

New columns added to Job/phase report

Three new columns have been added to job and phase level exports of the standard 'Job / phase report':

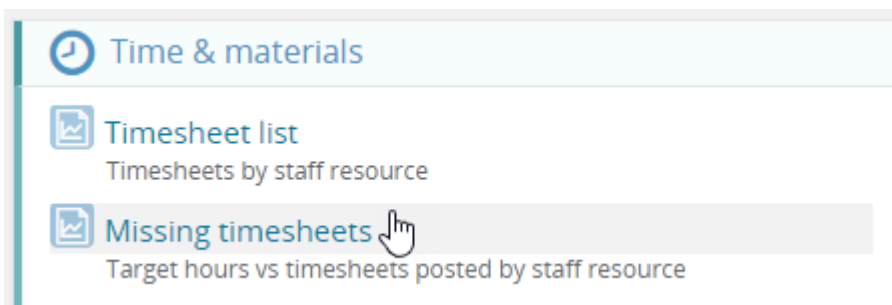
- Rating
- Source
- Weighting %

PDF option for Missing timesheet report

In addition to CSV formatting, 'Missing timesheets' can be viewed and printed as PDF files.

To view this feature:

- Select 'Standard reports' from the main menu
- Locate the 'Time & materials' panel and click 'Missing timesheets'



(REPORTING CONTINUED ...)

Purchase invoices awaited report - Defaults

Change to default settings

Default behaviour of this report has changed to include expenses; Filter options allow them to be suppressed.

The previous default settings meant that if the expense sheet date was after the cut off and the expense line date was before the cut off, these expense costs were not included in accruals.

SUPPLIERS

Supplier list - Custom fields in batch updates

Custom fields can now be updated using the Batch update utility. This is accessed via the main 'Supplier list'.

Batch update

Suppliers batch process for 1 record

Data

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

Mark as inactive Mark as active

Change default supply type

VAT

Change default markup

0.00

Custom fields

Main Contact

Telephone Number

URL

Date

Trading

Cancel

Inactive supplier shows in red

In the 'Supplier contact list', the name of an inactive supplier contact is highlighted in red.

Supplier contact list

Supplier contact list - All contacts

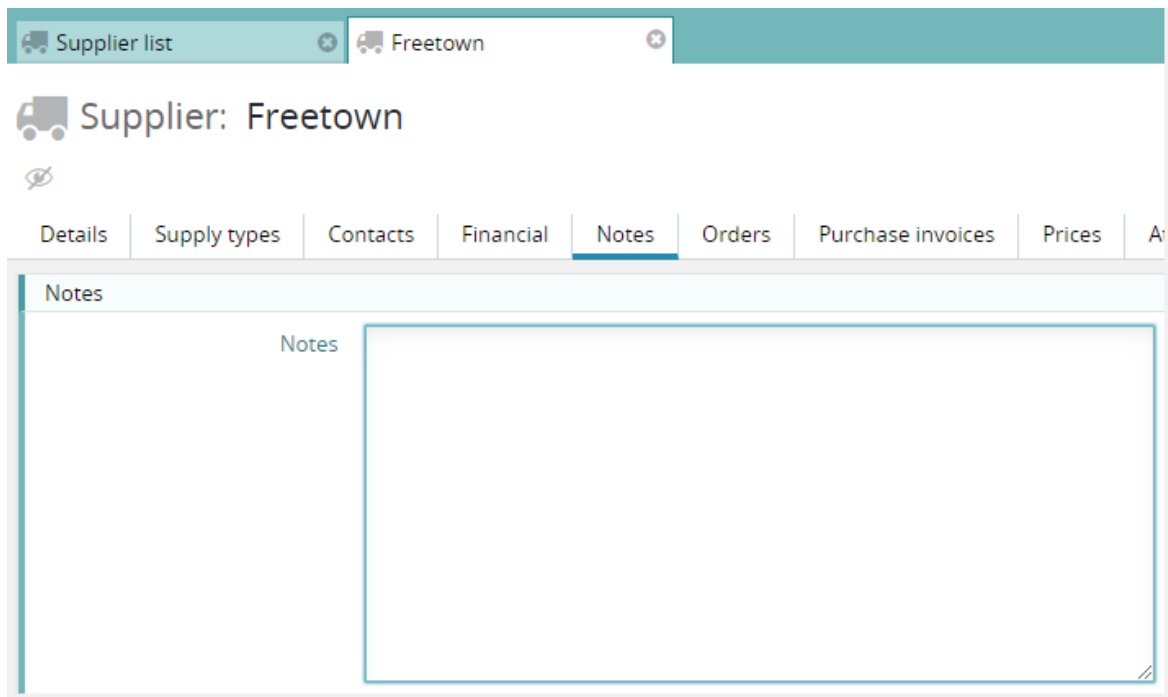
Views Actions Filter Delete Search

Name	Role
<input type="checkbox"/> Jan Hughes	
<input type="checkbox"/> Andy Best	
<input type="checkbox"/> Jim Steadman	
<input type="checkbox"/> Georgina Birtles	
<input type="checkbox"/> Ashley Grimes	
<input type="checkbox"/> Sandie Pearson	
<input type="checkbox"/> James Bolan	

(SUPPLIERS CONTINUED ...)

Notes tab for suppliers

A new 'Notes' tab has been added for suppliers. This replaces the 'Notes' field that was previously located inside the 'Financial' tab.




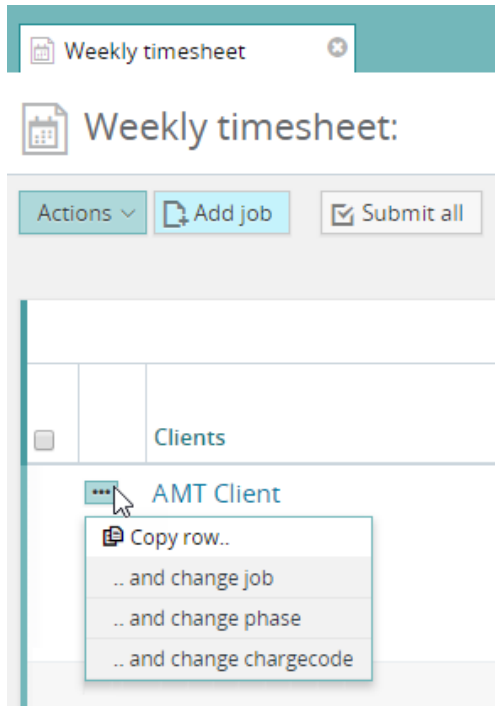
TIMESHEETS

Weekly timesheet - Copy timesheet row

Submitted and Posted timesheet rows can now be copied. Previously this could only be done for rows with un-submitted data.

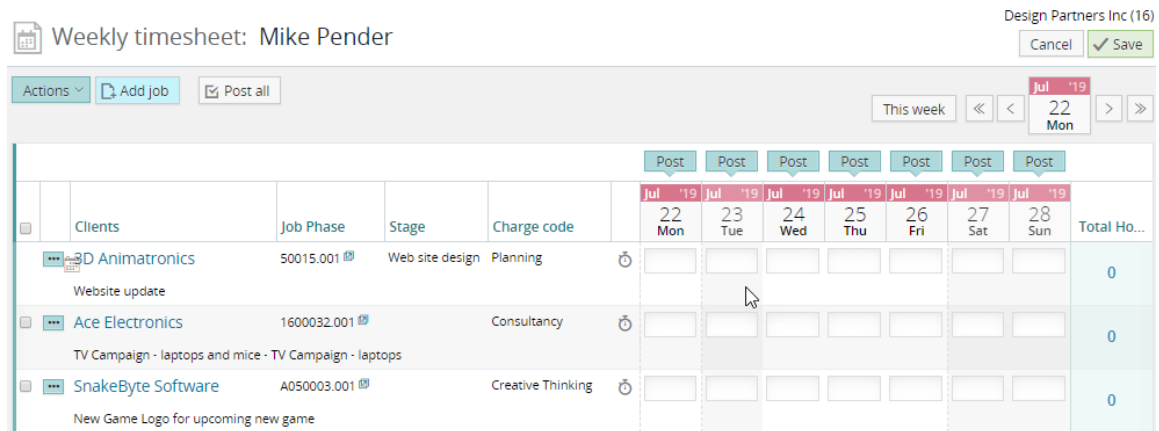
To access this feature:

- Select 'Weekly timesheet' in the main menu
- Locate the timesheet row
- Click the  icon to reveal the drop-down menu



Weekly timesheet - Grey-out additional non-working days

In a weekly timesheet, the background colour of a non-working day is light grey. However, users are still allowed to book time to non-working days.



(TIMESHEETS CONTINUED ...)

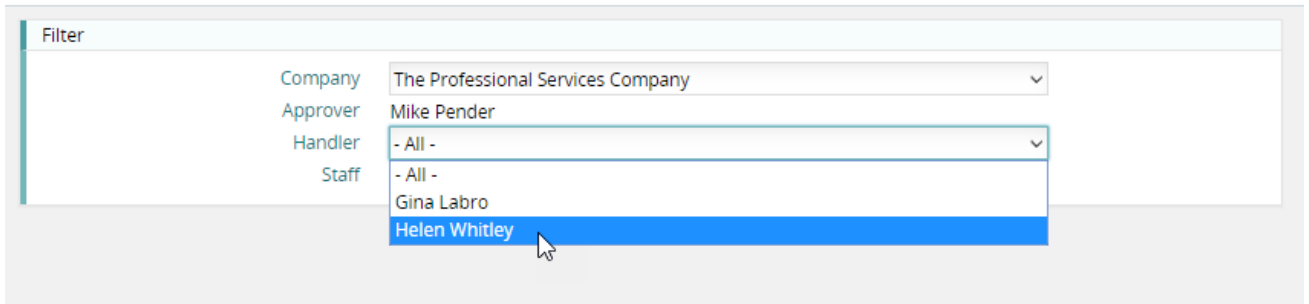
Timesheet approval – New filter

Ability to filter timesheets awaiting approval by phase handler.

If a user is an approver with the ability to approve staff timesheets, they may want to filter the timesheets they are approving to those posted on certain jobs. This feature enables the user to select a phase handler filter before selecting the staff whose timesheets they want to approve. For example, when a handler wants to approve submitted timesheets for work done on their jobs.

Timesheet approval staff selector

Timesheet approval



Filter

Company: The Professional Services Company

Approver: Mike Pender

Handler: - All -

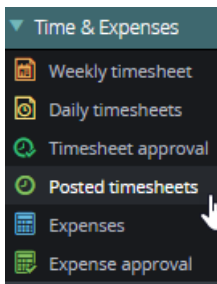
Staff: - All -
Gina Labro
Helen Whitley

Posted timesheets list

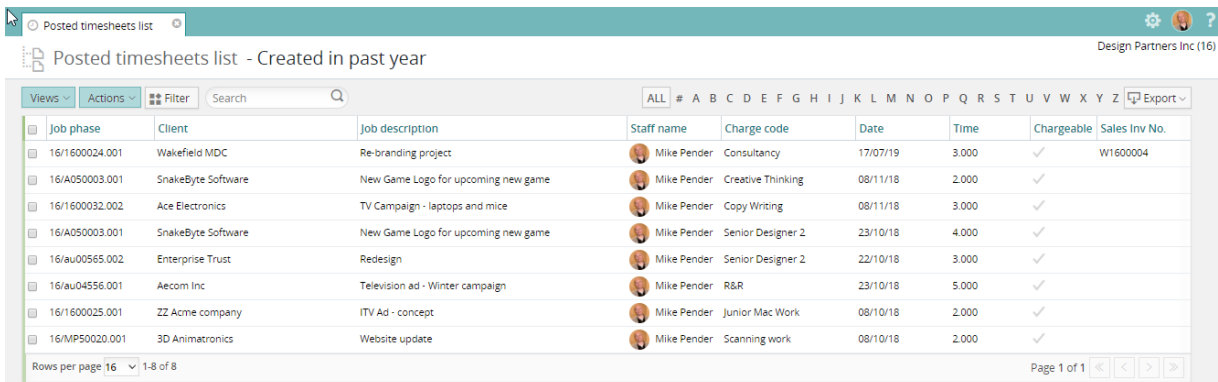
A list of posted timesheets is now available with filters and views to make it easy to track and analyse time being booked to jobs.

Main menu

The 'Posted timesheets list' is accessed by opening the 'Time & Expenses' area in the main menu and selecting 'Posted timesheets'.



Timesheet list



Posted timesheets list - Created in past year

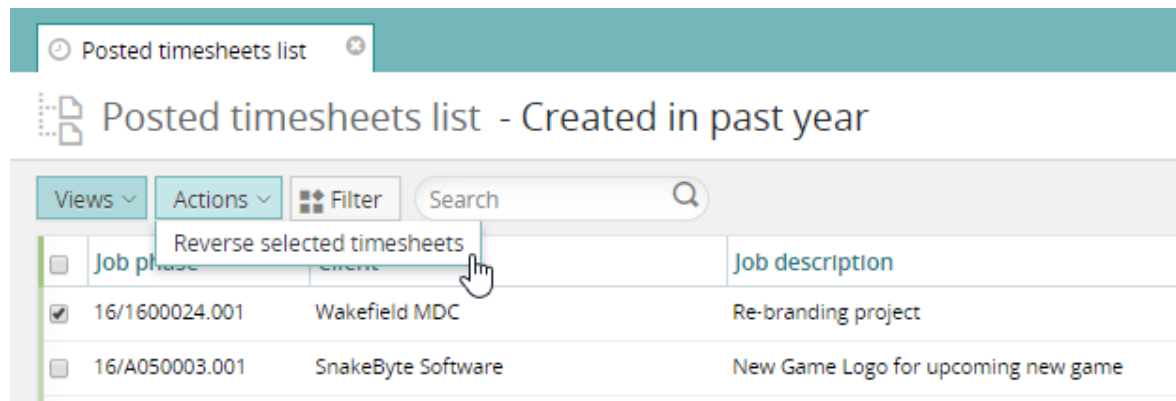
Job phase	Client	Job description	Staff name	Charge code	Date	Time	Chargeable	Sales Inv No.
16/1600024.001	Wakefield MDC	Re-branding project	Mike Pender	Consultancy	17/07/19	3.000	✓	W1600004
16/A050003.001	SnakeByte Software	New Game Logo for upcoming new game	Mike Pender	Creative Thinking	08/11/18	2.000	✓	
16/1600032.002	Ace Electronics	TV Campaign - laptops and mice	Mike Pender	Copy Writing	08/11/18	3.000	✓	
16/A050003.001	SnakeByte Software	New Game Logo for upcoming new game	Mike Pender	Senior Designer 2	23/10/18	4.000	✓	
16/au00565.002	Enterprise Trust	Redesign	Mike Pender	Senior Designer 2	22/10/18	3.000	✓	
16/au04556.001	Aecom Inc	Television ad - Winter campaign	Mike Pender	R&R	23/10/18	5.000	✓	
16/1600025.001	ZZ Acme company	ITV Ad - concept	Mike Pender	Junior Mac Work	08/10/18	2.000	✓	
16/MP50020.001	3D Animatronics	Website update	Mike Pender	Scanning work	08/10/18	2.000	✓	

Rows per page: 16 | 1-8 of 8 | Page 1 of 1

(TIMESHEETS CONTINUED ...)

Reversing a timesheet

Using the 'Actions' menu, it is possible to reverse one or more timesheets that may have been posted in error.



Processing

On selecting to reverse timesheets, new negative value pending timesheets are created. If the system does not use timesheet approval, or if the user doing the reversing action is a full approver, the newly created pending timesheets are immediately converted to real timesheets and posted.

Reversing timesheets can easily be spotted because they are of a negative value. On clicking one of these timesheets, the user sees that the 'Work done' comment displays 'when' and 'by whom' the timesheet was reversed.

GENERAL ENHANCEMENTS

Multi-user experience

New features have been added to enhance the multi-user experience.

Areas enhanced

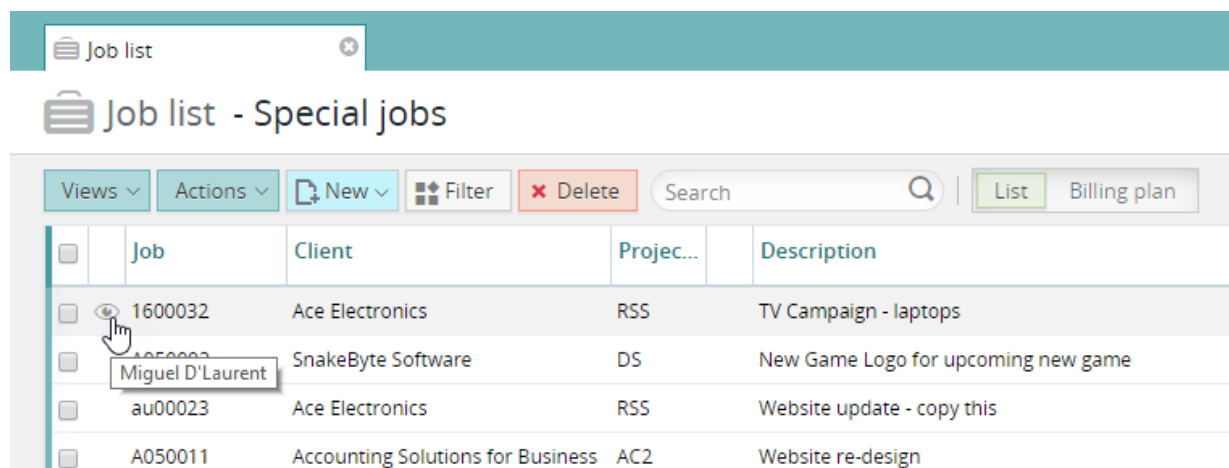
In v12.4, the following areas have been updated with new functionality:

- Clients
- Jobs
- Opportunities
- Phases
- Activities
- Suppliers

In future releases, other areas will also be enhanced.

Main lists – visibility of users

In the main lists, if other users have records open, a small 'eye' icon appears on the left-hand side of the screen, against each open record in the list. Hovering the cursor over the icon displays a list of all the users currently looking at (or possibly amending) the record.



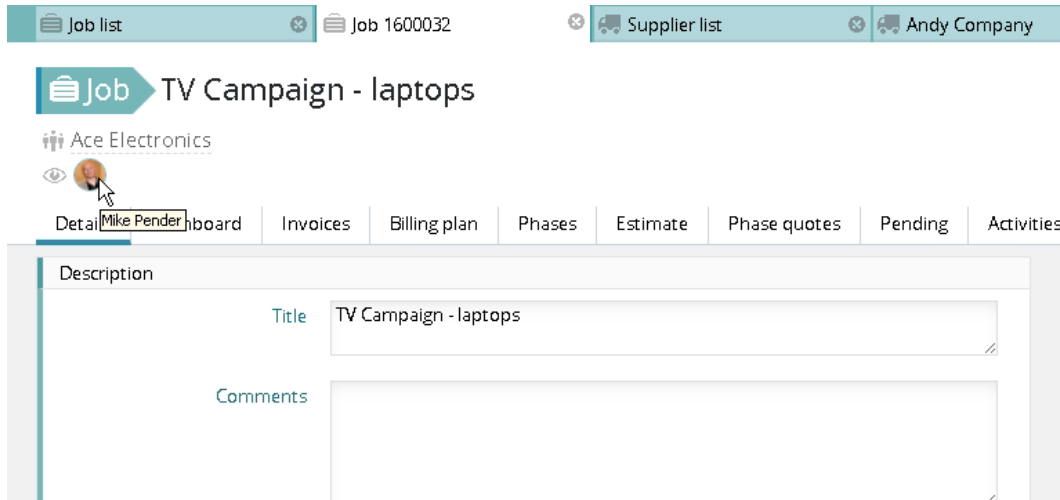
The screenshot shows a web interface for a 'Job list'. At the top, there is a teal header with a 'Job list' title and a close button. Below the header, the main content area is titled 'Job list - Special jobs'. A toolbar contains buttons for 'Views', 'Actions', 'New', 'Filter', 'Delete', a search box, and 'List' and 'Billing plan' buttons. The main area displays a table with the following data:

	Job	Client	Projec...	Description
<input type="checkbox"/>	1600032	Ace Electronics	RSS	TV Campaign - laptops
<input type="checkbox"/>	1600032	SnakeByte Software	DS	New Game Logo for upcoming new game
<input type="checkbox"/>	au00023	Ace Electronics	RSS	Website update - copy this
<input type="checkbox"/>	A050011	Accounting Solutions for Business	AC2	Website re-design

(GENERAL ENHANCEMENTS CONTINUED ...)

Records – visibility of users

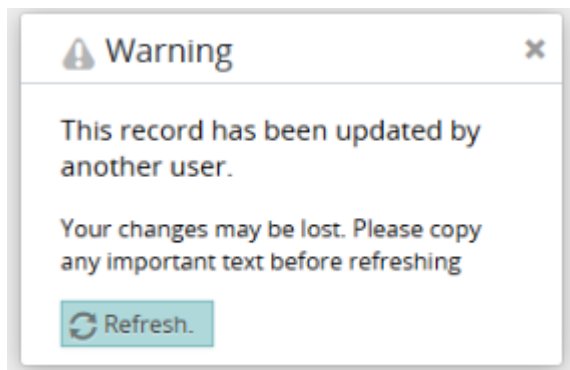
If more than one user has the same record open, the avatars for those users is displayed in the header.



Multiple users viewing the same record

Previously, the system saved a record if a user moved from one tab to another, even if no field changes had been made. Record saves now only occur when a user updates a field or executes an action. This means multiple users can view the same record simultaneously without being asked to re-load the record, unless another user has updated the record.

If another user has updated a record, the user sees the following message:



The warning message advises the user not to make any further changes to the record without first clicking on the 'Refresh' button. This new feature saves the user from having to close and re-open the record.

Hover text added to sub-lists

These are the lists that are found in certain tabs. Job/phases/activity lists are supported.

Example

	Phase	Description	Type
<input type="checkbox"/>	001	Re-branding project	CON
<input type="checkbox"/>	003	Job and phase: 16/1600024.001	EXP
<input type="checkbox"/>	002	Phase type: Concept	EST
<input type="checkbox"/>	005	Project: Non Client Channels	MAT
<input type="checkbox"/>	004	Description: Re-branding project	MAT
<input type="checkbox"/>	004	Maintenance contract	MAI

Next Phase

Total phases: 5 Completed: 1 Incomplete: 4 Final invoiced: 1 Non-final invoiced: 4

Help system

Both the Synergist cloud and 4D client products now use the Zendesk help system located at:

<https://synergistexpress.zendesk.com/hc/en-gb>

Batch updates – Boolean custom fields now supported

To batch update a custom Boolean field, select 'Yes' or 'No' from the drop-down menu. Selecting 'Yes' sets the field to TRUE. Selecting 'NO' sets the field to FALSE. Leaving the field blank, as with all batch updates, instructs the program not to update the field.

Example

Client Custom Boolean Field

Additional filter buttons

To help users amend their selected views, extra filter buttons have been added to the following areas:

- **Client** > 'Activities' tab and 'Attachments' tab
- **Client contact** > 'Activities' tab and 'Attachments' tab
- **Job** > 'Activities' tab and 'Attachments' tab
- **Phase** > 'Activities' tab and 'Attachments' tab
- **Stage** > 'Activities' tab and 'Attachments' tab
- **Supplier** > 'Orders' tab, 'Purchase Invoices' tab and 'Attachments' tab

The screenshot shows the software interface for a client named '3D Animatronics'. The 'Activities' tab is selected. The toolbar includes buttons for 'All activities', 'Actions', 'New', 'Filter', 'Delete', 'Note type', 'List', and 'Kanban'. The 'Filter' button is highlighted with a mouse cursor. Below the toolbar is a table with the following data:

	Job/Phase	Type	Contact	Description/Comments
<input type="checkbox"/>	16/1250039	Email		Document Folder
<input type="checkbox"/>	16/0050015.001	Email		Document Folder
<input type="checkbox"/>	16/0050015.001	Email		Document Folder
<input type="checkbox"/>	16/0050015.001	Email		Document Folder

Please note that the 'Filter button' does not appear on:

- Kanban views
- User defined tab views

Hovers added to key main lists


Hovers have been added to the following main lists:




- Client contacts
- Revenue management
- Invoices & drafts
- Projects
- Sub-Projects
- Stages
- Advanced features

Billing settings Accruals

Invoice

In our 12.3 release, a feature to specific Deferred / Accrued on invoice headers was introduced.

 Draft invoice: D1600218

 Ace Electronics  16/1600004  Graphics for New Hunter game

Type	Invoice
Revenue balance	Deferred
Final	
Inv date	
Order number	Deferred
	Accrued

Company settings

This feature can now be shown/hidden by navigating to 'Company settings', selecting the 'Codes' tab and ticking/unticking the 'Enable revenue accrue/defer facility' box.

Billing

Invoice	1600038
	<input type="checkbox"/> Own inv number
Invoice prefix	
Credit note	0
Write-off	1600005
Revenue Recognition	<input checked="" type="checkbox"/> Allow revenue recognition
	1003
	<input checked="" type="checkbox"/> Enable revenue accrue/defer facility
Draft invoice	1600227

Custom labels

Certain key labels can now be customised. This feature helps consultancies who typically have different names for these key entities.

Labels	
Project label	Framework
Campaign label	Sub framework
Team label	My Team
Handler label	Project lead

Custom fields – New URL custom field

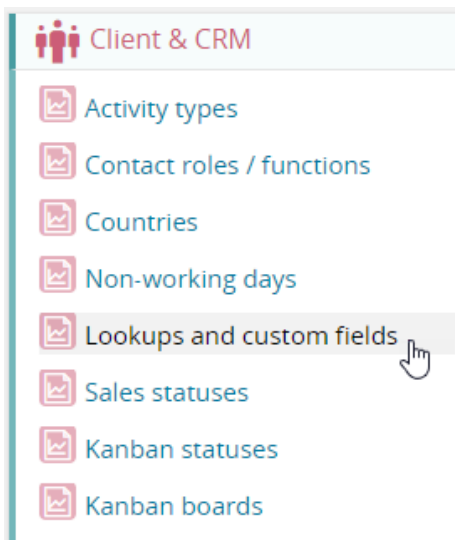
Custom fields were previously text, numeric, date or Boolean (Yes/No). A new type of 'URL' custom field has been added, enabling users to enter a URL and for it to work as a link.

'Custom fields' can be created in the following areas:

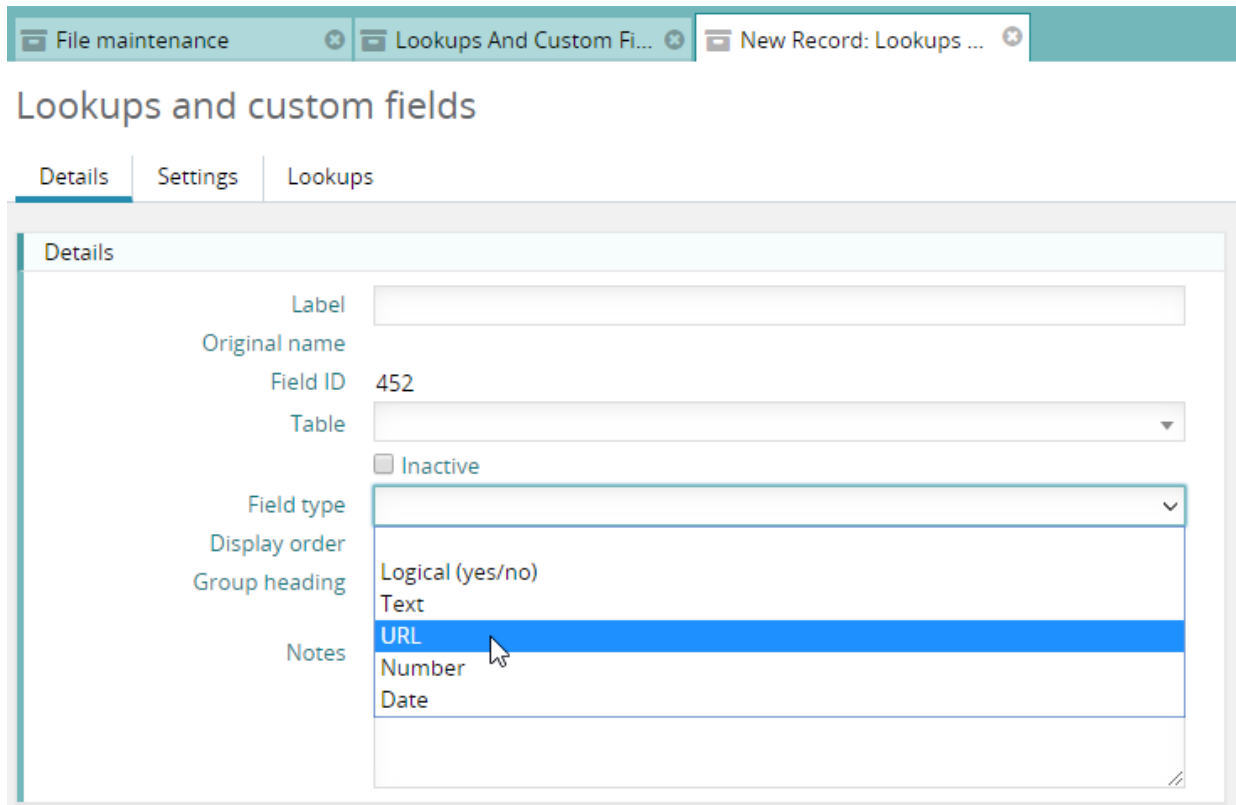
- Jobs
- Phases
- Contacts
- Organizations
- Stages
- Activities
- Suppliers
- Frameworks
- Sub Frameworks

Creating a URL custom field

- Navigate to 'Settings'
- Choose 'File Maintenance'
- Select 'Lookups and custom fields' in the 'Client & CRM' panel




- Click the 'New' button
- Complete the fields in the 'Details' screen



- **Label:** The name of the field that appears on screen
- **Table:** Where the Custom field is to be located
- **Field type:** Select 'URL' from the drop-down menu

Creating a link within a URL custom field

- Select 'Jobs' in the main menu
- Open a job
- Click the 'Details' tab
- Locate the custom fields panel
- Click on the  icon to type or paste a link in the field



Please remember to include **www.** when typing a URL address.

File Maintenance – 3 new options added to the Activity type table

To access these new options:

- Navigate to 'File Maintenance'
- Select 'Activity types'
- Choose an activity from the 'Activity types List'
- Click the 'Details' tab
- Locate the 3 new options in the 'Misc' panel on the right-hand side of the screen

Calendar options	Owner x
Allow time sheet	No
Default owner/watcher	Owner

Calendar options

The only option available is 'Owner'. Selecting this option defaults all new activities of this type to be available for display in calendars. The default setting can be overridden in actual activities.

Allow time sheet

This feature allows users to create timesheets on activities of this type.

The options are:

- No
- Owner only
- Anyone

Default owner / watcher

Selecting this option defaults all new activities of this type to have the creator of the activity set as owner, watcher or left blank.

The options are:

- No
- Owner
- Watcher
- Both (Owner & Watcher)