synergist

Version 11 - Release Notes

Note: Synergist v11 requires 4D v13

Intentionally Blank Page

Contents

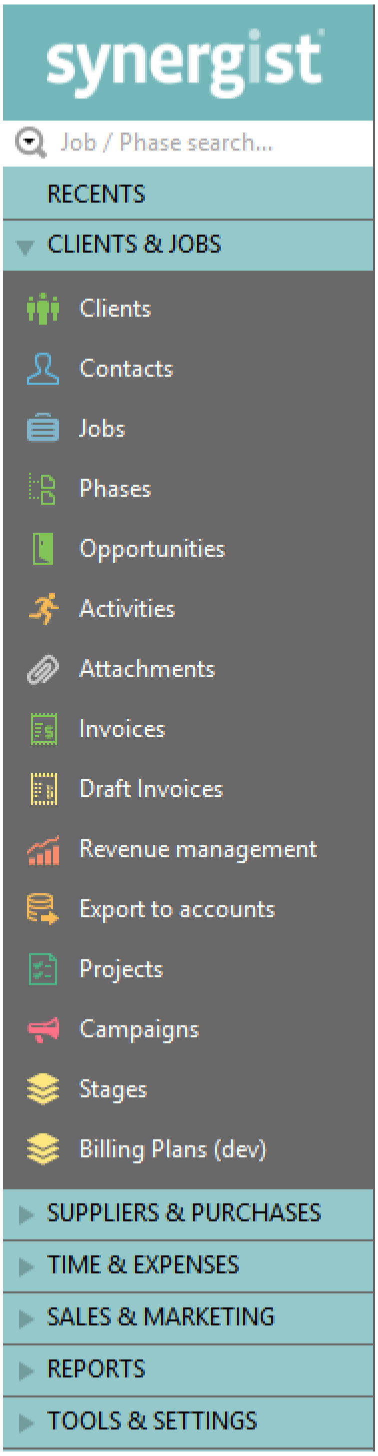
Synergist user interface

Overview

The user interface in the v11 Synergist upgrade has been enhanced. Menus, tables and forms have all had a “cosmetic” overhaul. However, the fundamental design remains the same so no additional training will be required for users already familiar with Synergist.

Menus

The main menu has been given a fresher look with new colours and icons.

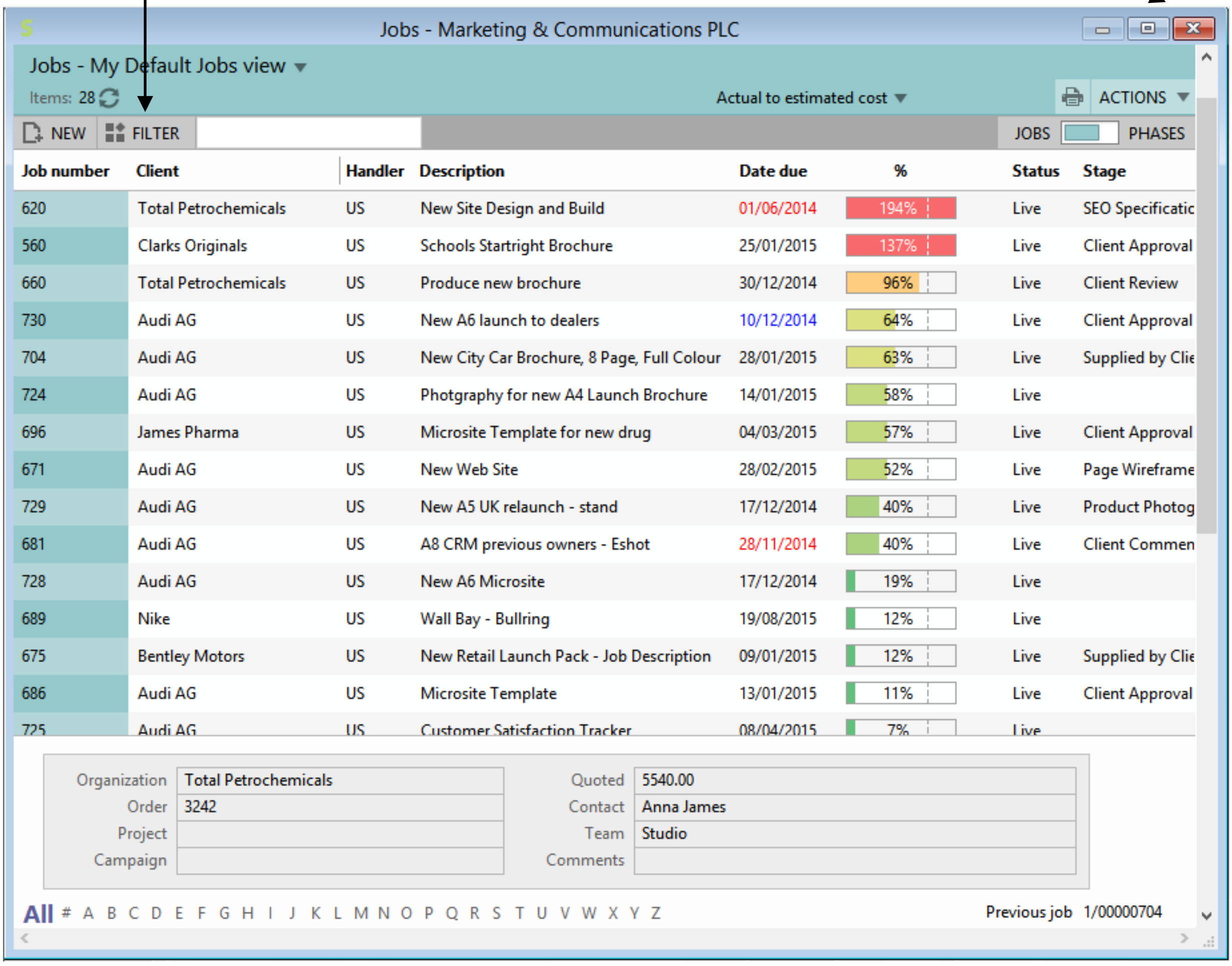


Job list

All the list screens have been improved with some minor design changes.

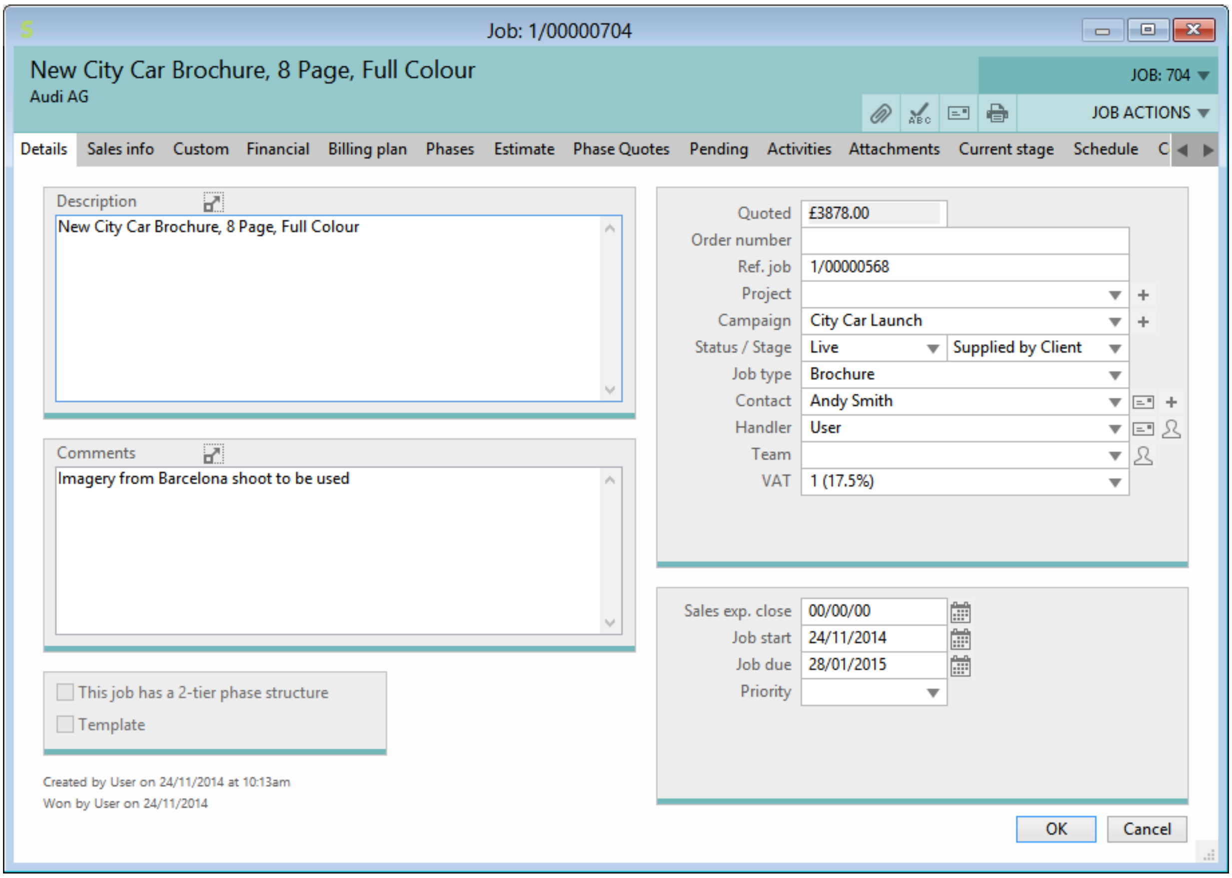
The old "torch" icon replaced with a filter button

Click the "X" to close the window (there is now no "Done" button)



Job input form

All the input forms have a fresh look with some minor design changes.

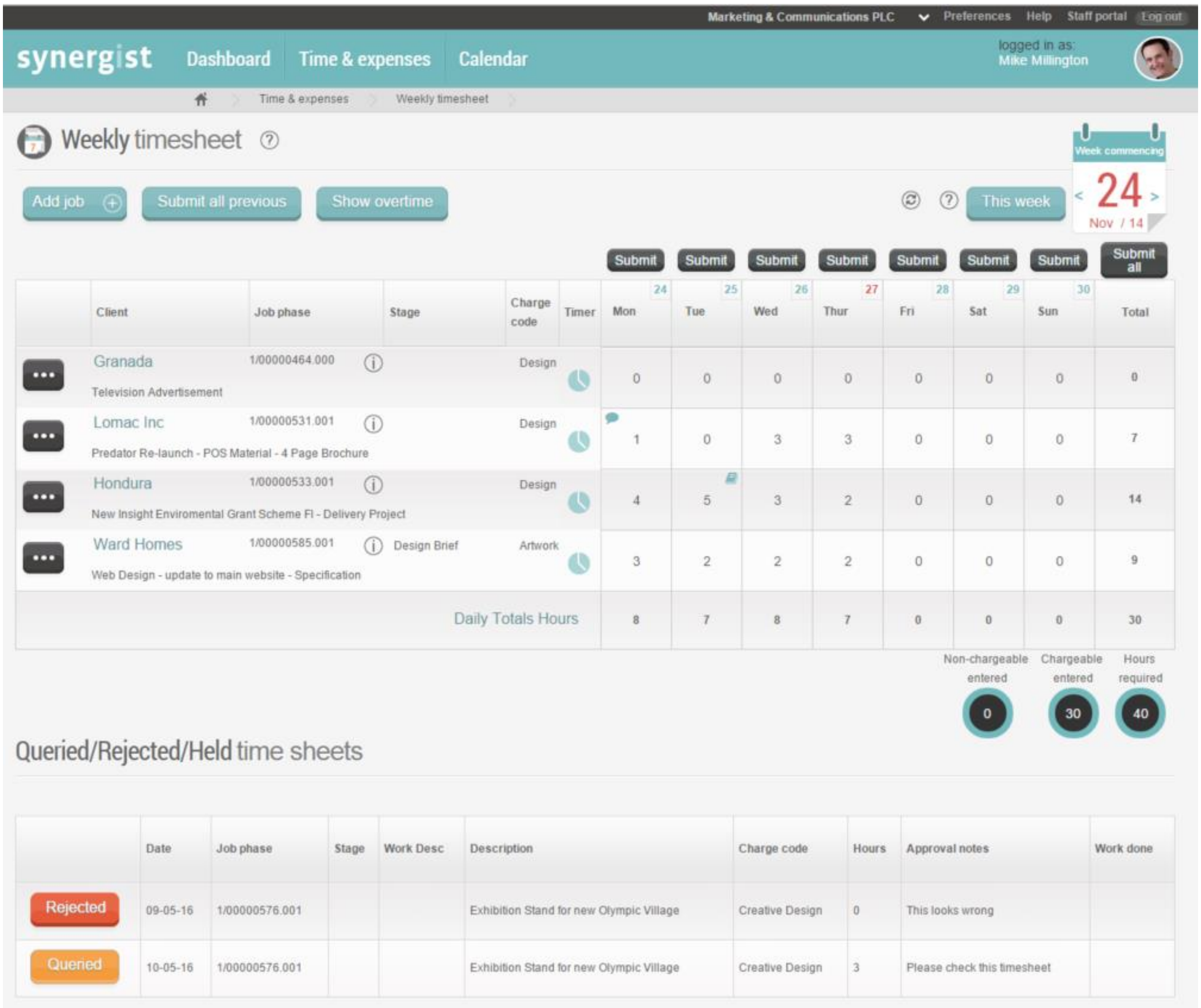


Time & Expenses module (beta)

Overview

Currently most Synergist users enter their timesheets and expenses using the Staff Portal web interface. In Synergist version 11 we are introducing an optional replacement for the Time, Expenses and Calendar. This new interface has a similar functionality as the current system but it has major improvements in terms of its usability and future development potential.

See "Time & Expenses module (beta)" release notes for more details.

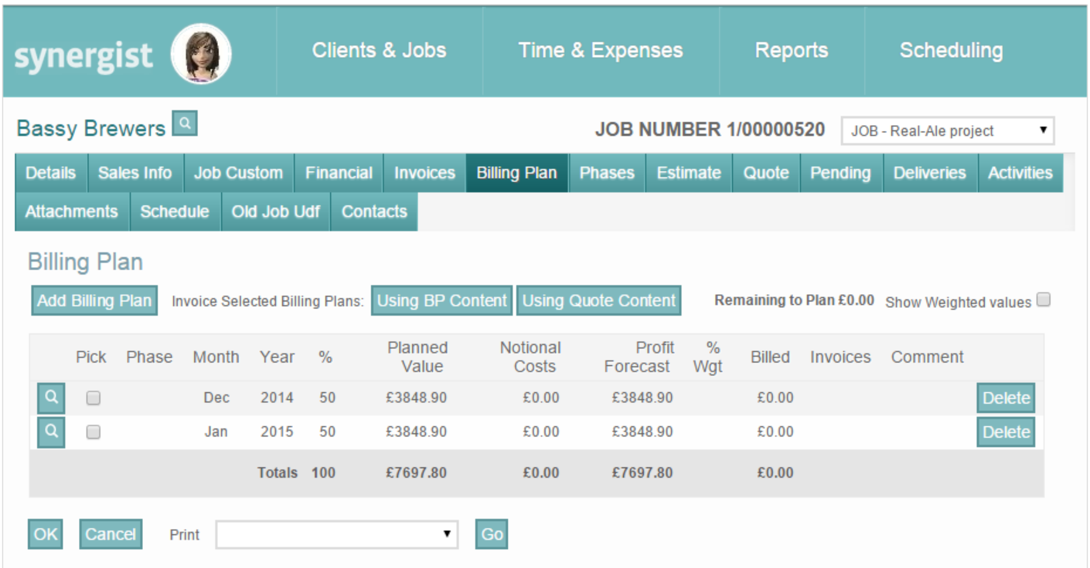


Staff Portal

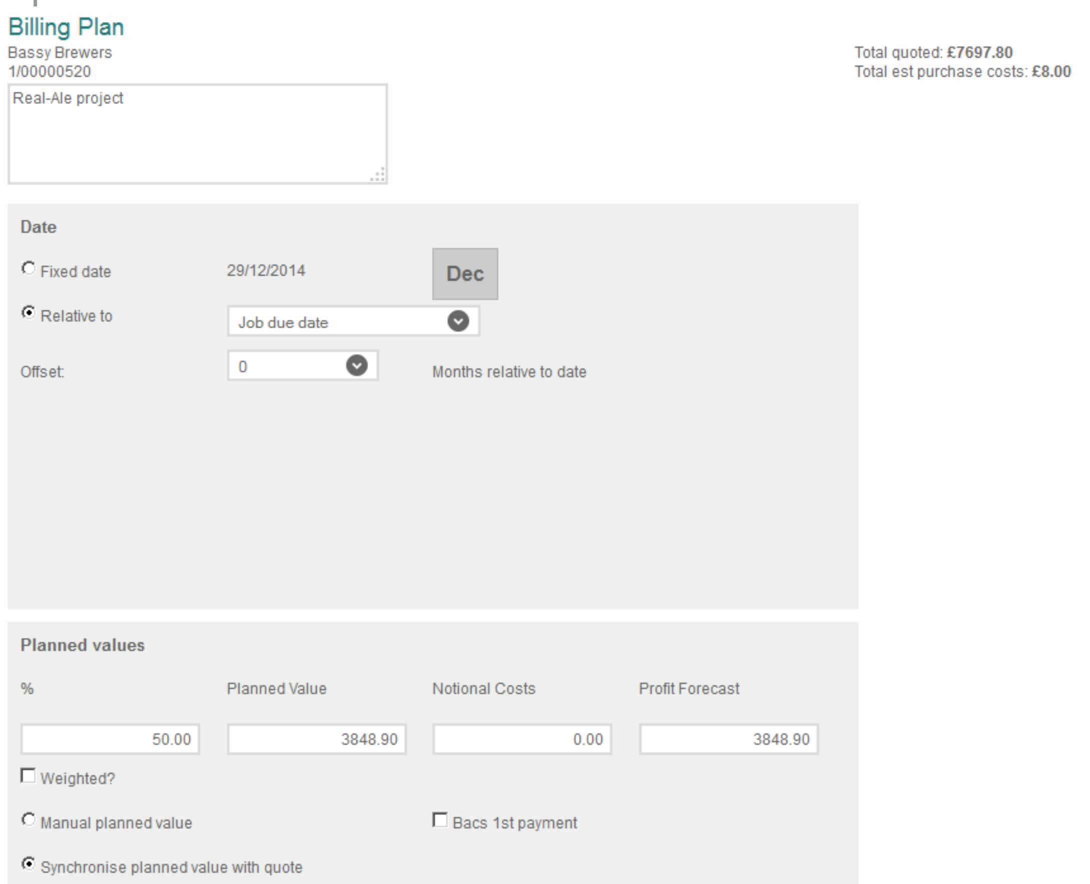
Billing plans

The Synergist desktop billing plan feature has now been added to the Synergist Staff Portal. This includes creating and modifying billing plans on jobs and phases.

It is also possible to generate invoices based on billing plans. For more info on billing plans please refer to the Synergist online help system.



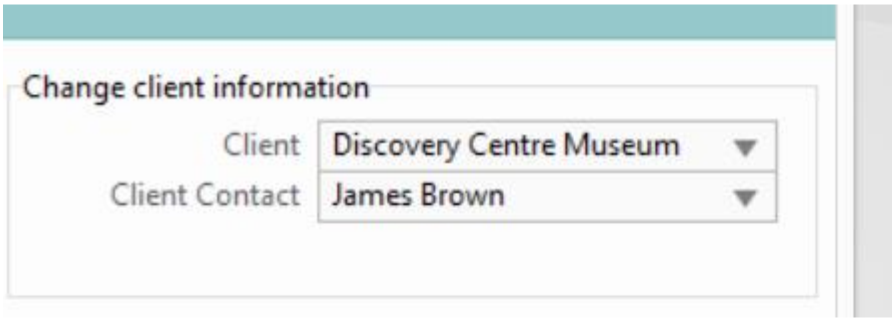
Input form



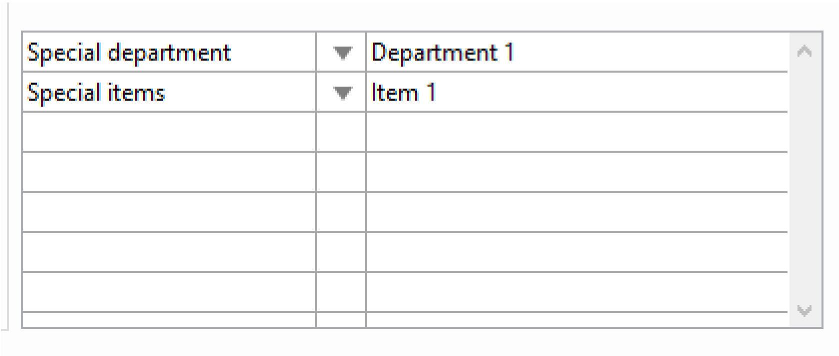
Jobs

Batch update

Client and contacts can now be batch amended for a group of jobs. However, all the selected jobs must be for the same client.



Custom fields have also been added to job/phase batch update feature



Hiding costs

Financial page and hiding costs

The job and phase financial page previously had much of the user interface hidden from view if the user had the “hide costs” setting. Now just cost (and of course therefore) profit figures are hidden. Enhancement requests to still show profit figures in this scenario have been received, however that would rather defeat the purpose of hiding costs as it would be trivial for a user to create a single 1 hour estimate or to view a job with only 1 person’s timesheets entered so far and the costs would be plain to establish if profit figures were shown. For this reason, the profit figures were always and still remain also hidden from view if a user has the “hide costs” setting.

Reporting

New fields

Sales turnover report

The export version now includes the date invoices were made real.

Progress report

The export version now includes the job / phase type.

DTS Source

This is a special export file that is used for passing data across to Word based template documents. Phase number has been added as an additional field.

Data viewer

A new option to filter by Phase had been added together with an option to cut the result data by Stage type for those using 2-tier jobs.

Opportunity / Pipeline Export

The export of opportunities data now includes columns to show the latest activity record details for the opportunity.

Prospect list Export

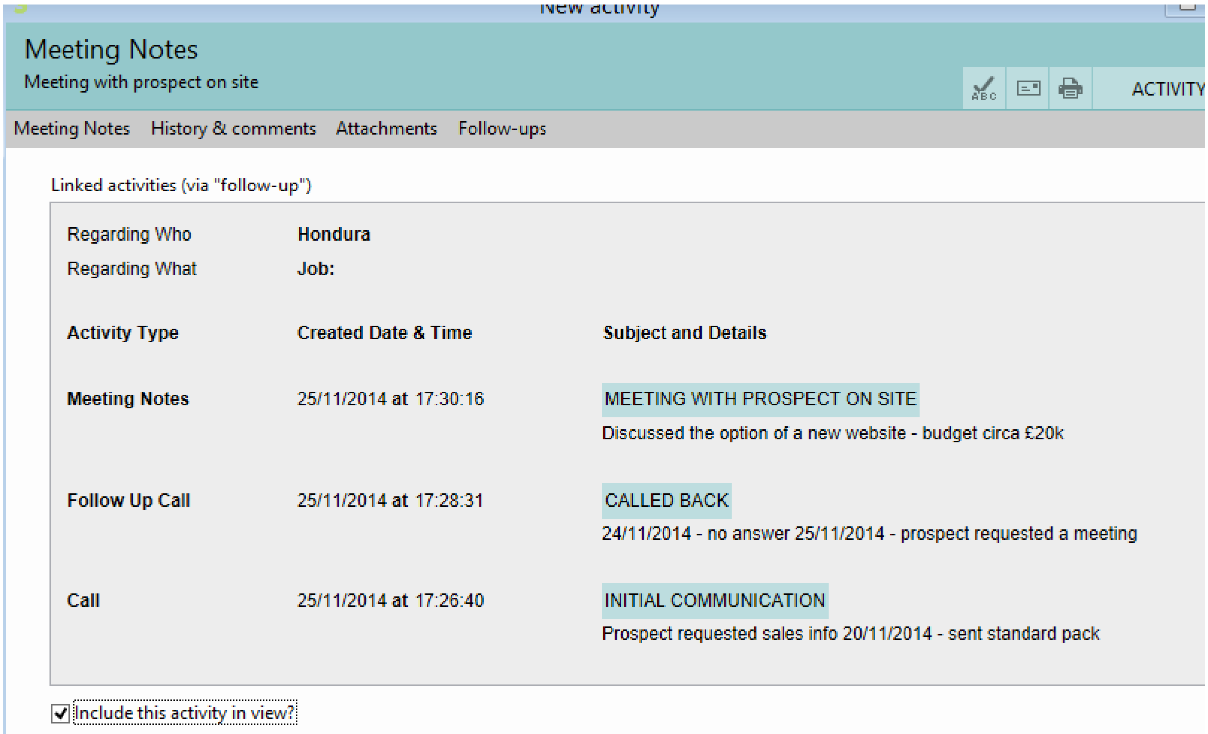
The export of prospect organizations data now includes a column to show if the prospect was previously a client.

Activities

Follow-ups – new view

Activity follow-up is a useful Synergist feature whereby a subsequent Activity can be created as a “next action” record. This is especially useful when working with sales prospects – where it is important to have a history of all the communications you have had with a prospect.

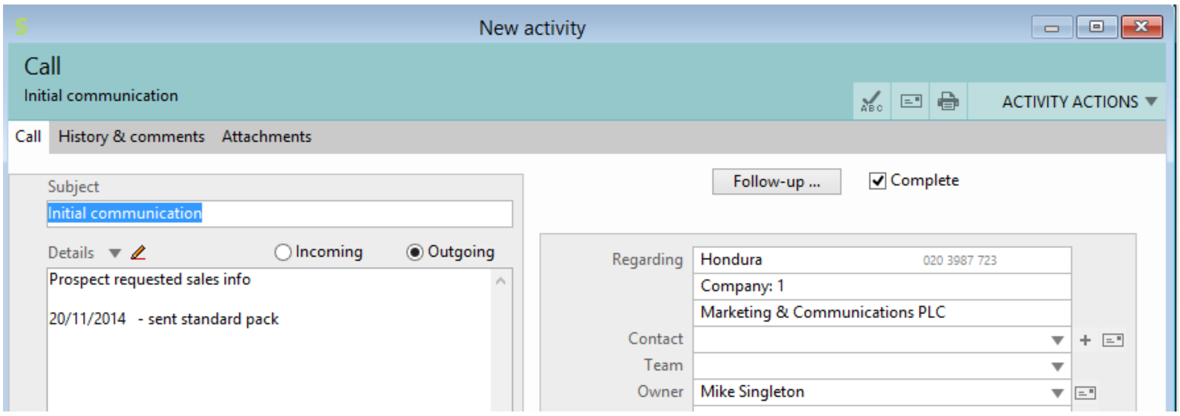
A new view of this “thread” is now provided within a Synergist activity record. This is found under the new “Follow-up” tab.



Example of using follow-ups

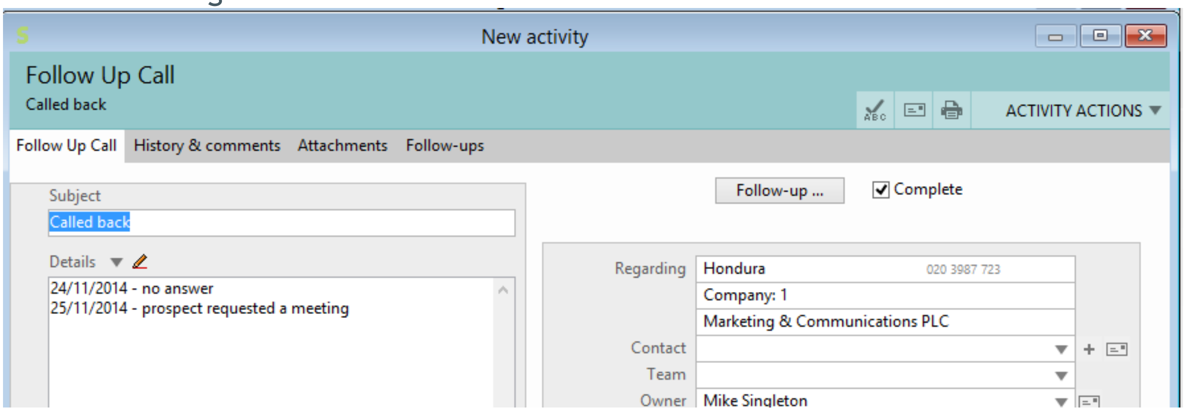
Initial communications

1st activity created – user makes some notes re: the initial communication, marks the activity as complete and clicks the follow-up button.



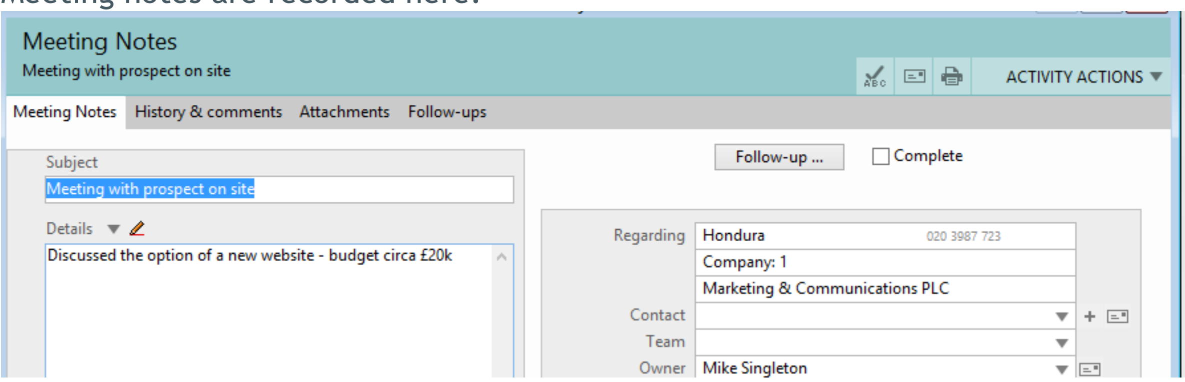
Follow-up calls

A follow-up call type activity is created. This is used to track phone conversations with the prospect. The user then closes this activity and creates a new activity to record meeting notes.



Meeting notes

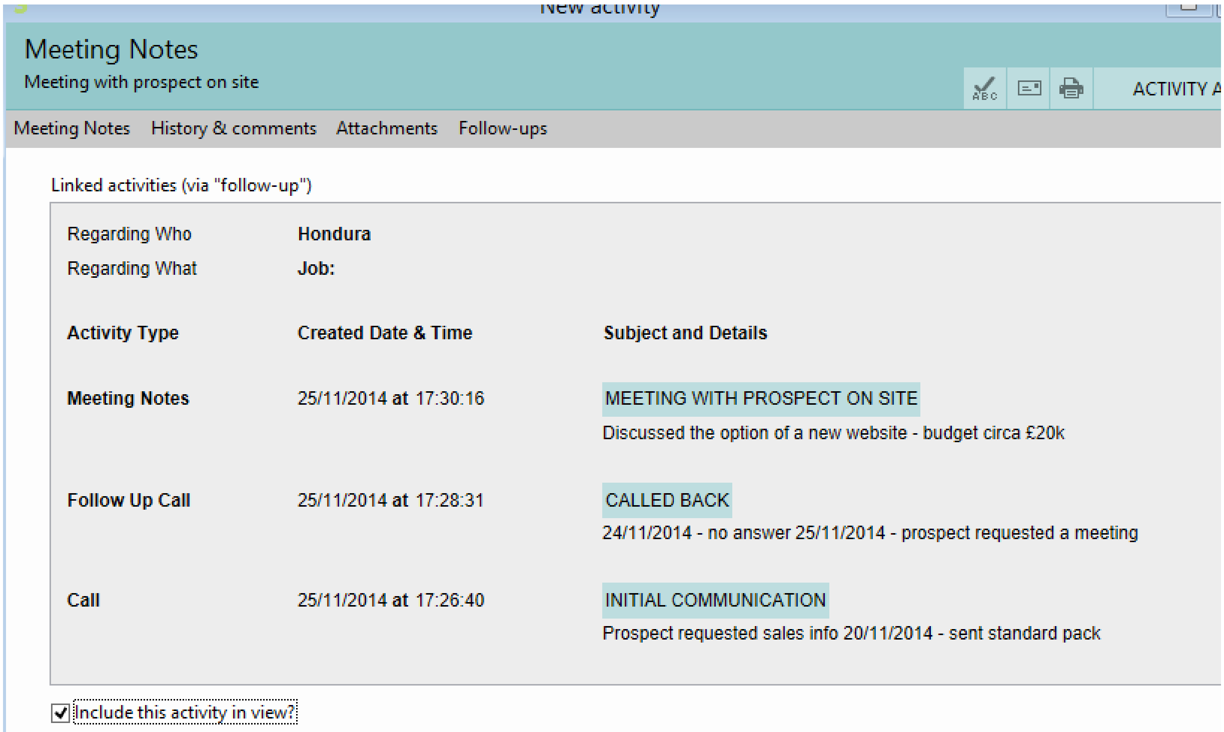
Meeting notes are recorded here.



Follow-ups tab

If the user now clicks on the “Follow-ups” tab a summary of all 3 activities is displayed.

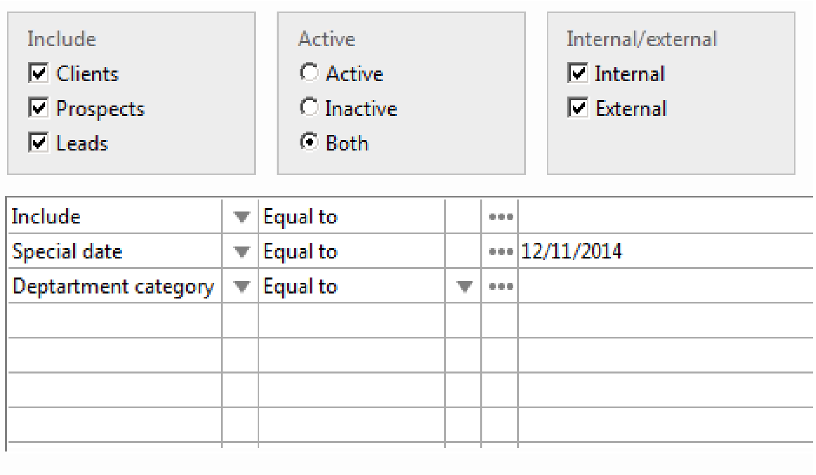
Clicking on the green highlights will open up these earlier activities if the user needs to see additional details.



Filtering the activities list

Activity criteria screen

You can now filter the activity list based on organization level user defined fields

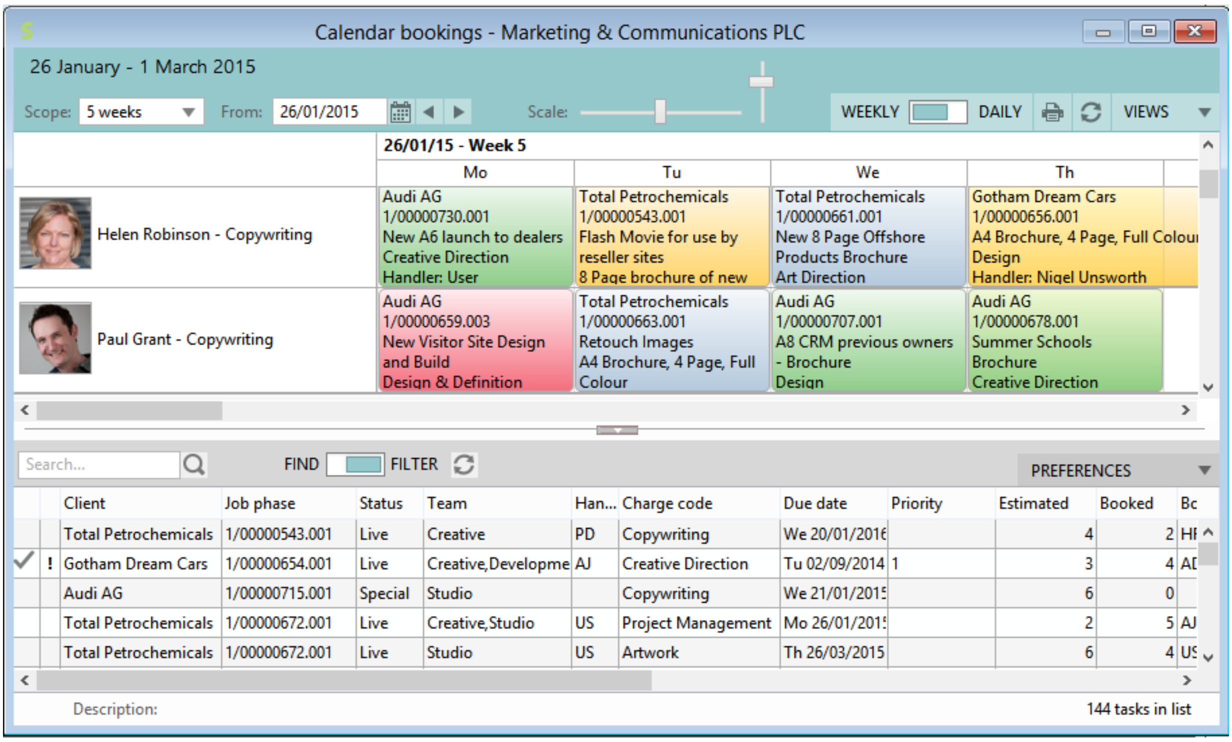


Work allocation calendar

Standard view

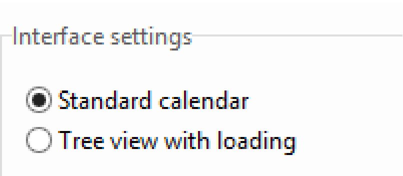
A new standard view was added to the Synergist work allocation calendar in a 10.7 maintenance release.

The new Standard Calendar view shows people avatars/icons at the left hand side and bookings are shown along that row. There is no loading row shown, nor any expand/collapse icons. Row height is now controlled by an on-form slider and the large/small rows preference is gone.



Preferences

You can change your default view via "Views/Preferences"



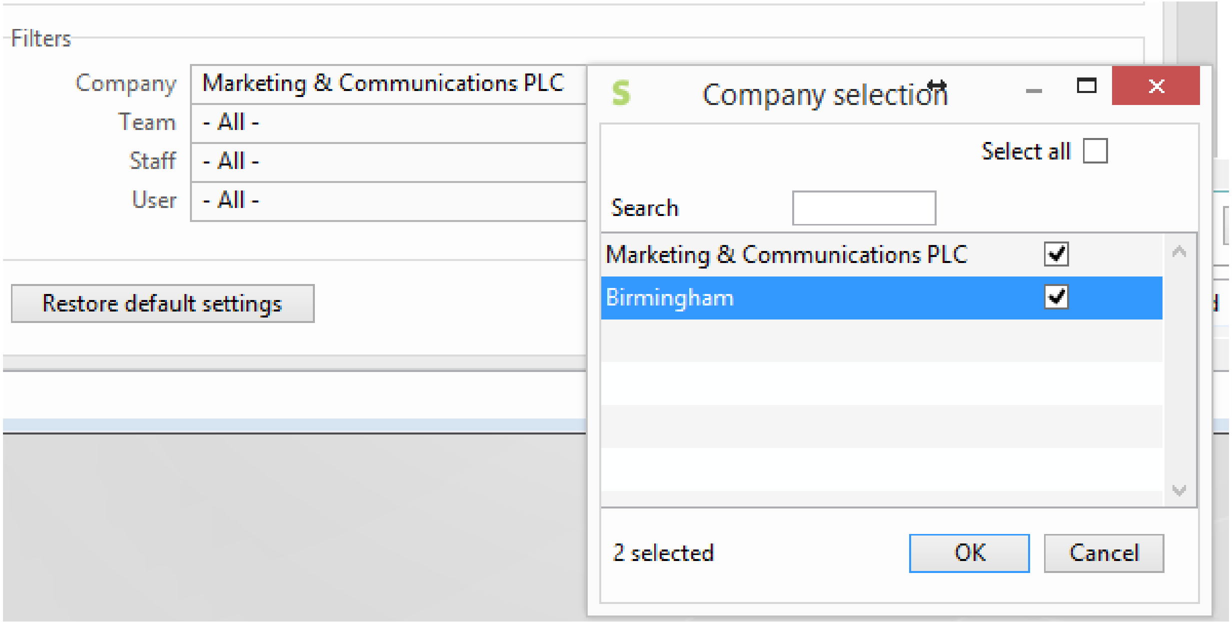
Note: The default view is still "Tree" view as before.

Multi-company feature

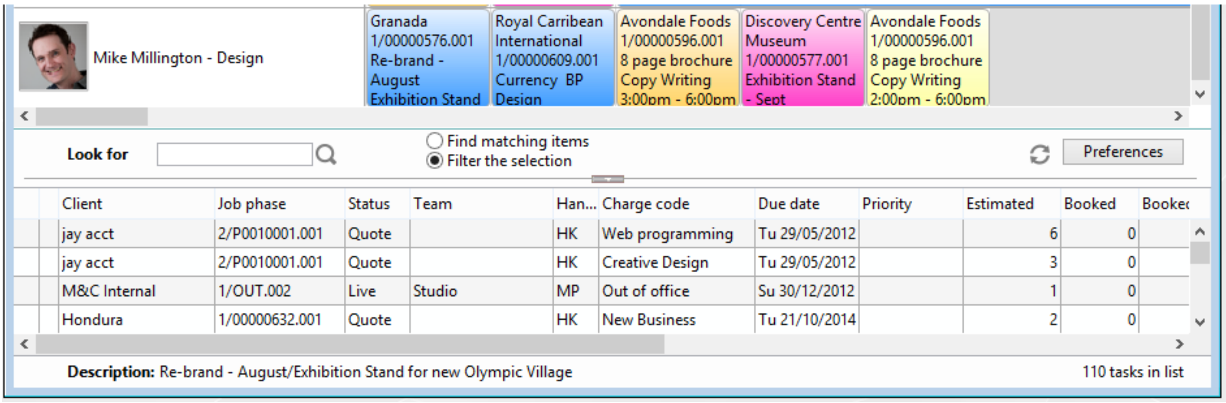
If you have resources that are working in multiple companies it is now possible to allocate work to them from jobs belonging to multiple companies on the same input screen.

Selecting multiple companies

In the work allocation calendar go to “views”, “preferences” and select the companies you wish to see in the view.

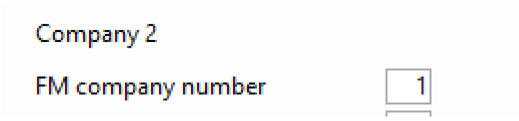


As you can see in this example the job list now has jobs from both company 1 and company 2.



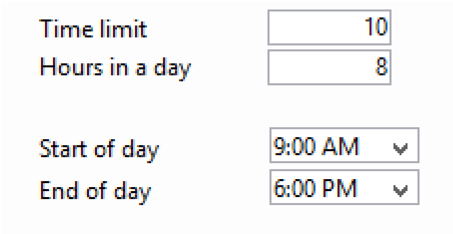
Set-up

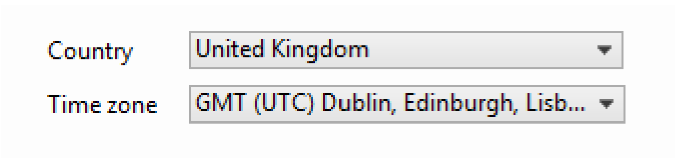
There are some restrictions to take into account. Any companies appearing in the same view must share "FM". This is done on the details page of the company settings. In this example company 2 is sharing FM (file maintenance) with company 1



Note: Do NOT change this value if you already have jobs in the company. This is a setting that is to be set before you go live, unless advised by your Synergist project manager. In addition, it is **not possible** to share file maintenance data between companies which operate using different **base** currencies.

It is also necessary to have the number of hours in the day, and start and end times of the two companies the same, and both companies must be set to the same country and time zone:

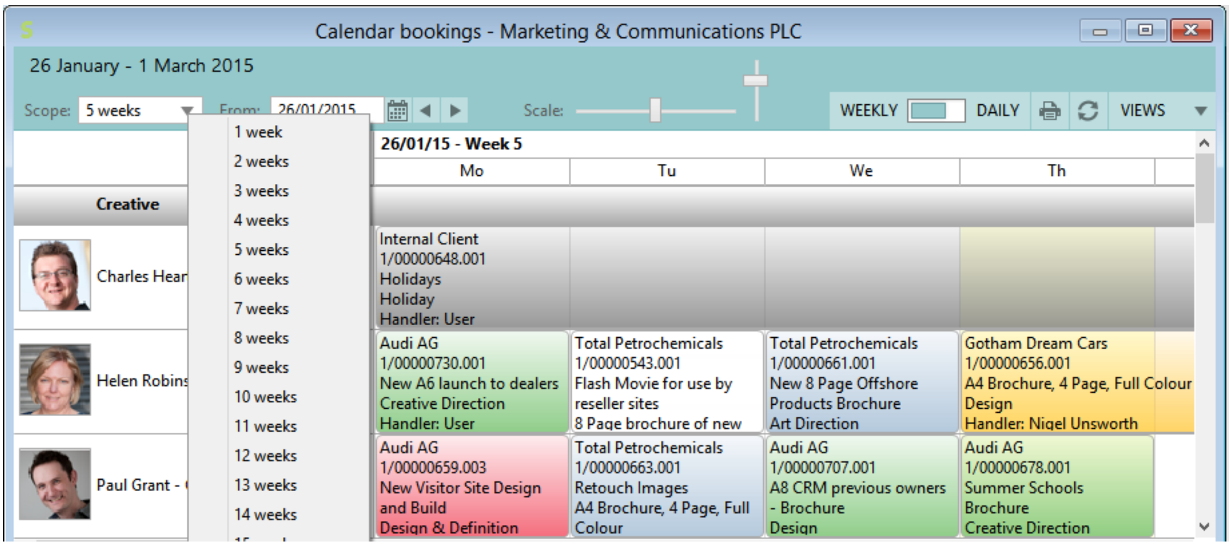




Date range

You now have more control over the date range displayed on the calendar.

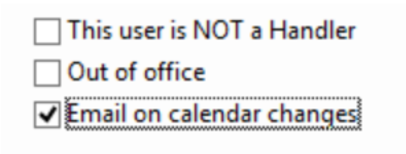
- In Weekly view - up to 26 weeks
- In the Daily view - up to 5 weeks



Alert resource

It is now possible to have an automatic alert sent to staff resources when an item is added or moved in the work allocation calendar.

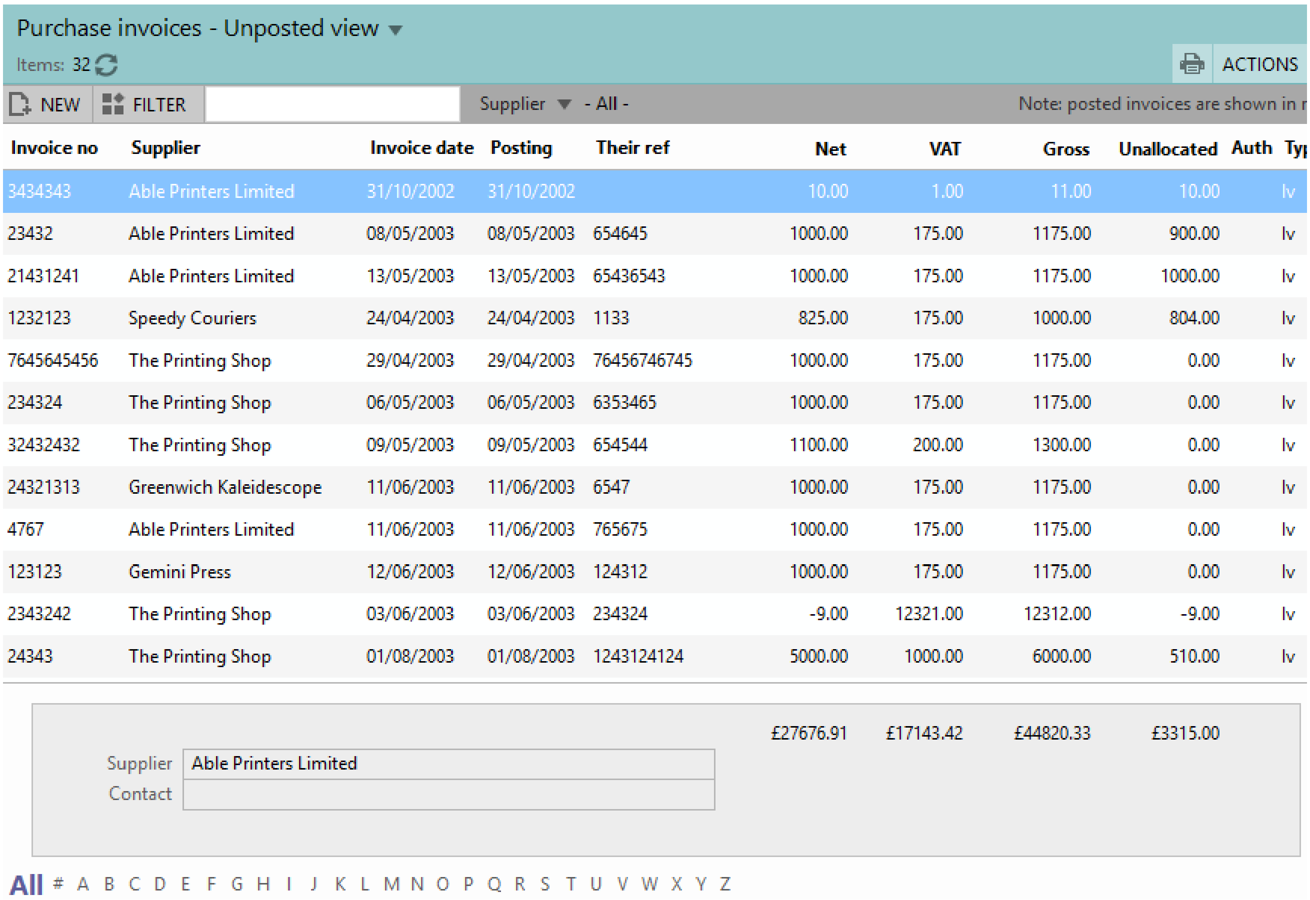
To switch this feature on for a particular user go to the user record, details tab. In the section below select “Email on calendar changes”



Purchasing

Purchase invoice list

The list of purchase invoices now has totals.



Invoice no	Supplier	Invoice date	Posting	Their ref	Net	VAT	Gross	Unallocated	Auth	Typ
3434343	Able Printers Limited	31/10/2002	31/10/2002		10.00	1.00	11.00	10.00		Iv
23432	Able Printers Limited	08/05/2003	08/05/2003	654645	1000.00	175.00	1175.00	900.00		Iv
21431241	Able Printers Limited	13/05/2003	13/05/2003	65436543	1000.00	175.00	1175.00	1000.00		Iv
1232123	Speedy Couriers	24/04/2003	24/04/2003	1133	825.00	175.00	1000.00	804.00		Iv
7645645456	The Printing Shop	29/04/2003	29/04/2003	76456746745	1000.00	175.00	1175.00	0.00		Iv
234324	The Printing Shop	06/05/2003	06/05/2003	6353465	1000.00	175.00	1175.00	0.00		Iv
32432432	The Printing Shop	09/05/2003	09/05/2003	654544	1100.00	200.00	1300.00	0.00		Iv
24321313	Greenwich Kaleidescope	11/06/2003	11/06/2003	6547	1000.00	175.00	1175.00	0.00		Iv
4767	Able Printers Limited	11/06/2003	11/06/2003	765675	1000.00	175.00	1175.00	0.00		Iv
123123	Gemini Press	12/06/2003	12/06/2003	124312	1000.00	175.00	1175.00	0.00		Iv
2343242	The Printing Shop	03/06/2003	03/06/2003	234324	-9.00	12321.00	12312.00	-9.00		Iv
24343	The Printing Shop	01/08/2003	01/08/2003	1243124124	5000.00	1000.00	6000.00	510.00		Iv
					£27676.91	£17143.42	£44820.33	£3315.00		

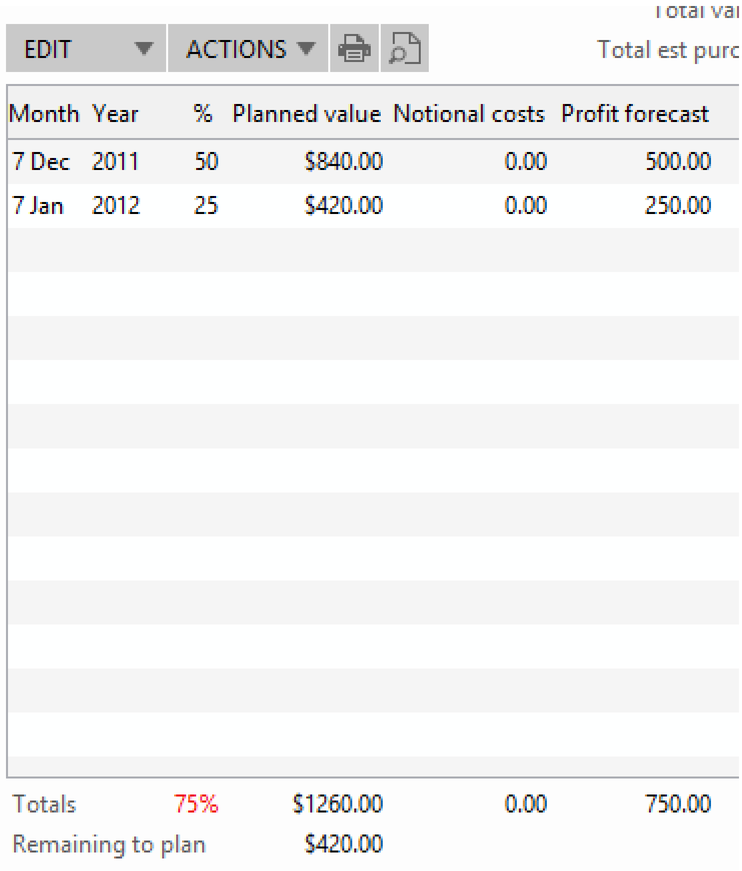
Xero - Tax rates.

Adding a new tax code/rate is now allowed in Xero. We have therefore added a facility to the Tax/VAT codes section in Synergist File Maintenance to lookup the tax types from Xero via their API.

The post transactions routine has also been enhanced to validate against Tax codes stored in Xero. Previously it used a hard-wired list of Xero tax types.

Billing plans

On the Billing plan page of jobs & phases - a "Remaining to plan" figure is now displayed (quote figure - planned figure)

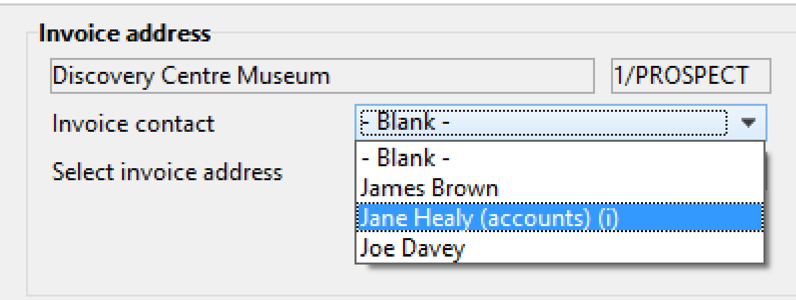


Invoice approval alerts.

The Invoice value has been added to invoice approval alerts.

Invoice addresses

When selecting an invoice contact – those contacts that are set up as having a special invoice address now have a "(i)" shown after the name for clarity.



Miscellaneous

Client contact & Supplier contact records

A field has been added for storing the Skype address.

De-Duplication feature

On the results screen, there is now a facility to open a client contact record.

Invoice phase allocations

We now show the deferred total value on Phase allocations tab in-line on each row.

Expense attachments

New option in System parameters - option to bypass the use of document attachment paths. Expense attachments/receipts are then always stored in the database instead of using the Synergist document attachments folder.

Phase display order

It is now possible to change the display order of phases for a job by using drag and drop on the phases tab on the job record. **Note:** this will overwrite any previously defined phase display orders you may have entered in a phase record.

PDF Creator 2

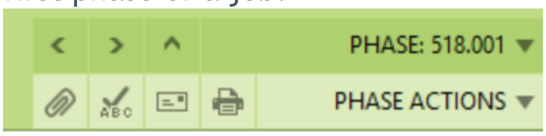
Support has been added for this software.

Job and phase – thermometer

These are now shown on the estimate and financial screens in the web portal as well as in the Synergist desktop version.

Job phase card – skip through phases of a job

You now have the option to step easily though the phases of a job from within a phase record (arrow buttons). We have also provided a button to navigate “up” to the job record and also a button to navigate “down” from the job record into the first phase of a job.



Client target records

It is now possible to remove unwanted client target records from within the client record card.   This is done by Right-clicking on the records you no longer need.

Team iCal feed

You can now obtain an iCal feed from Synergist for a team, in addition to the current functionality that already exists for a Synergist user. You can obtain the special URL from the teams list in Synergist File Maintenance. As with the user iCal feed, you use the special URL in your calendar application (eg: Outlook/iCal/Google Calendar etc). The output of the Team iCal feed includes the details of who each entry is for, whereas this is not required in the user iCal feed.

Technical addendum

Sales pipeline - views

Pipeline screen - the views that were used here were previously shared with the opportunities list. We have now created a separate view type specifically for Pipeline and this now allows the user to set a default view for it.

Mailplane support (Mac email client)

Support for Mailplane 3 on Mac for email creation/PDF attaching.

Synergist API V3.06

Version 11 of synergist is released with an updated API (version 3).

This new API supports the following additional features:

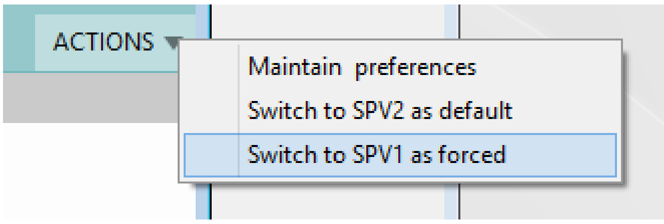
- Time sheets (read/write)
- Materials sheets (read/write)
- Expenses (read/write)
- Calendar (read only)

For more information regarding Synergist's API version 3 please contact our support department, or email us at apisupport@synergist.co.uk

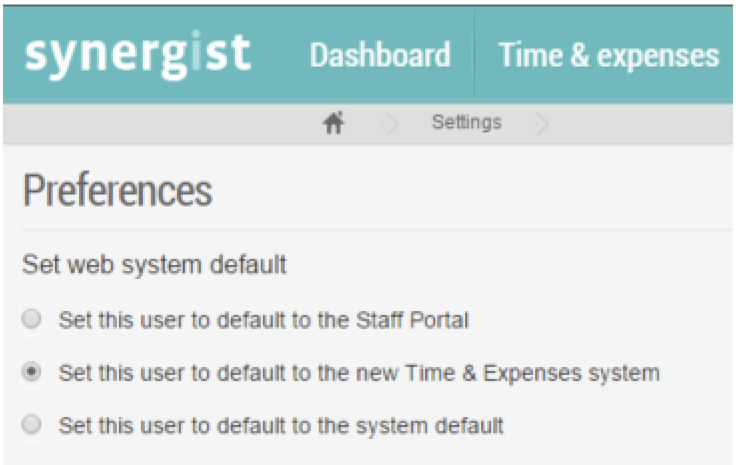
Note: Synergist API V2.2 can still be used as a read only API for Clients/Jobs/Activities

Browser Time & Expenses (beta) – Access Control

The v.11 release of the expenses module is designed for Mac & PC (not tablet) and is a beta version of the product. If you do not wish to try out this beta version it can be turned off in system parameters (under the "actions" button). Switch to SPV1 as forced will turn the beta off for all staff. It is possible to do this for individual staff members as well.



If a user wants the system to default to the new beta (for themselves) they can set the system to default to "new Time & Expenses" in the preferences section of the new system. By default the current staff portal is always opened by default.



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