

synergist

Version 11 - Release Notes

Note: Synergist v11 requires 4D v13

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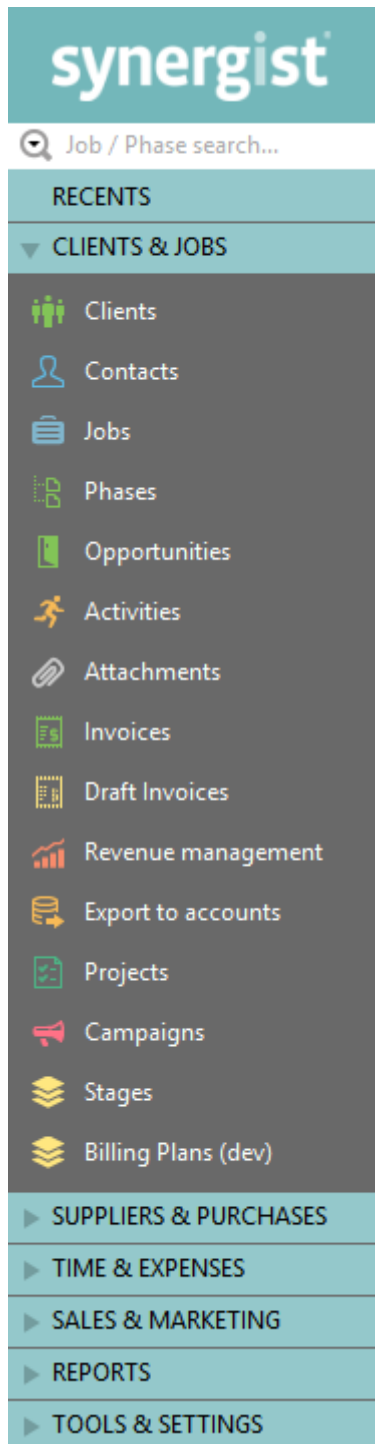
Synergist user interface

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 number	Client	Handler	Description	Date due	%	Status	Stage
620	Total Petrochemicals	US	New Site Design and Build	01/06/2014	194%	Live	SEO Specificatic
560	Clarks Originals	US	Schools Startright Brochure	25/01/2015	137%	Live	Client Approval
660	Total Petrochemicals	US	Produce new brochure	30/12/2014	96%	Live	Client Review
730	Audi AG	US	New A6 launch to dealers	10/12/2014	64%	Live	Client Approval
704	Audi AG	US	New City Car Brochure, 8 Page, Full Colour	28/01/2015	63%	Live	Supplied by Clie
724	Audi AG	US	Photography for new A4 Launch Brochure	14/01/2015	58%	Live	
696	James Pharma	US	Microsite Template for new drug	04/03/2015	57%	Live	Client Approval
671	Audi AG	US	New Web Site	28/02/2015	52%	Live	Page Wireframe
729	Audi AG	US	New A5 UK relaunch - stand	17/12/2014	40%	Live	Product Photog
681	Audi AG	US	A8 CRM previous owners - Eshot	28/11/2014	40%	Live	Client Commen
728	Audi AG	US	New A6 Microsite	17/12/2014	19%	Live	
689	Nike	US	Wall Bay - Bullring	19/08/2015	12%	Live	
675	Bentley Motors	US	New Retail Launch Pack - Job Description	09/01/2015	12%	Live	Supplied by Clie
686	Audi AG	US	Microsite Template	13/01/2015	11%	Live	Client Approval
725	Audi AG	US	Customer Satisfaction Tracker	08/04/2015	7%	Live	

Organization	Total Petrochemicals	Quoted	5540.00
Order	3242	Contact	Anna James
Project		Team	Studio
Campaign		Comments	

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Previous job 1/00000704

Job input form

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

The screenshot shows a software window titled 'Job: 1/00000704' with a teal header. The main title is 'New City Car Brochure, 8 Page, Full Colour' for 'Audi AG'. The job number is 'JOB: 704'. A navigation bar includes tabs for 'Details', 'Sales info', 'Custom', 'Financial', 'Billing plan', 'Phases', 'Estimate', 'Phase Quotes', 'Pending', 'Activities', 'Attachments', 'Current stage', and 'Schedule'. The 'Details' tab is active.

The form is divided into several sections:

- Description:** A text area containing 'New City Car Brochure, 8 Page, Full Colour'.
- Comments:** A text area containing 'Imagery from Barcelona shoot to be used'.
- Metadata:** A list of fields with values: Quoted (£3878.00), Order number (empty), Ref. job (1/00000568), Project (dropdown), Campaign (City Car Launch), Status / Stage (Live / Supplied by Client), Job type (Brochure), Contact (Andy Smith), Handler (User), Team (dropdown), and VAT (1 (17.5%)).
- Dates and Priority:** Fields for Sales exp. close (00/00/00), Job start (24/11/2014), Job due (28/01/2015), and Priority (dropdown).
- Options:** Two checkboxes: 'This job has a 2-tier phase structure' and 'Template', both currently unchecked.
- Footer:** 'Created by User on 24/11/2014 at 10:13am' and 'Won by User on 24/11/2014'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

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.

Weekly timesheet

Week commencing **24** Nov / 14

Client	Job phase	Stage	Charge code	Timer	Mon 24	Tue 25	Wed 26	Thur 27	Fri 28	Sat 29	Sun 30	Total
Granada	1/0000464.000	①	Design	⌚	0	0	0	0	0	0	0	0
Lomac Inc	1/0000531.001	①	Design	⌚	1	0	3	3	0	0	0	7
Hondura	1/0000533.001	①	Design	⌚	4	5	3	2	0	0	0	14
Ward Homes	1/0000585.001	①	Design Brief	⌚	3	2	2	2	0	0	0	9
Daily Totals Hours					8	7	8	7	0	0	0	30

Non-chargeable entered: 0 | Chargeable entered: 30 | Hours required: 40

Queried/Rejected/Held time sheets

	Date	Job phase	Stage	Work Desc	Description	Charge code	Hours	Approval notes	Work done
Rejected	09-05-16	1/0000576.001			Exhibition Stand for new Olympic Village	Creative Design	0	This looks wrong	
Queried	10-05-16	1/0000576.001			Exhibition Stand for new Olympic Village	Creative Design	3	Please check this timesheet	

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.

The screenshot shows the Synergist Staff Portal interface. At the top, there is a navigation bar with the Synergist logo and a user profile picture. Below the navigation bar, there are tabs for 'Clients & Jobs', 'Time & Expenses', 'Reports', and 'Scheduling'. The main content area is titled 'Bassy Brewers' and shows 'JOB NUMBER 1/00000520' with a dropdown menu for 'JOB - Real-Ale project'. Below this, there are tabs for 'Details', 'Sales Info', 'Job Custom', 'Financial', 'Invoices', 'Billing Plan', 'Phases', 'Estimate', 'Quote', 'Pending', 'Deliveries', and 'Activities'. The 'Billing Plan' tab is selected. Below the tabs, there is a 'Billing Plan' section with an 'Add Billing Plan' button and 'Invoice Selected Billing Plans: Using BP Content Using Quote Content'. A table shows the billing plan details:

Pick	Phase	Month	Year	%	Planned Value	Notional Costs	Profit Forecast	% Wgt	Billed	Invoices	Comment
<input type="checkbox"/>		Dec	2014	50	£3848.90	£0.00	£3848.90		£0.00		Delete
<input type="checkbox"/>		Jan	2015	50	£3848.90	£0.00	£3848.90		£0.00		Delete
Totals				100	£7697.80	£0.00	£7697.80		£0.00		

At the bottom of the table, there are buttons for 'OK', 'Cancel', 'Print', and 'Go'.

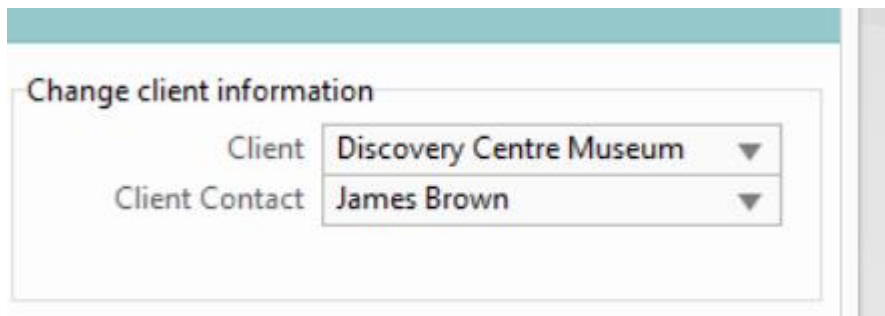
Input form

The screenshot shows the 'Billing Plan' input form. At the top, there is a header with 'Billing Plan', 'Bassy Brewers', and '1/00000520'. On the right, there is a summary: 'Total quoted: £7697.80' and 'Total est purchase costs: £8.00'. Below the header, there is a text input field for 'Real-Ale project'. The main form is divided into two sections: 'Date' and 'Planned values'. The 'Date' section has radio buttons for 'Fixed date' and 'Relative to'. The 'Fixed date' is selected, and the date is '29/12/2014'. The 'Relative to' section has a dropdown menu for 'Job due date' and an 'Offset' field set to '0'. The 'Planned values' section has input fields for '%', 'Planned Value', 'Notional Costs', and 'Profit Forecast'. The values are: % = 50.00, Planned Value = 3848.90, Notional Costs = 0.00, Profit Forecast = 3848.90. There are also checkboxes for 'Weighted?', 'Manual planned value', 'Bacs 1st payment', and 'Synchronise planned value with quote'.

Jobs

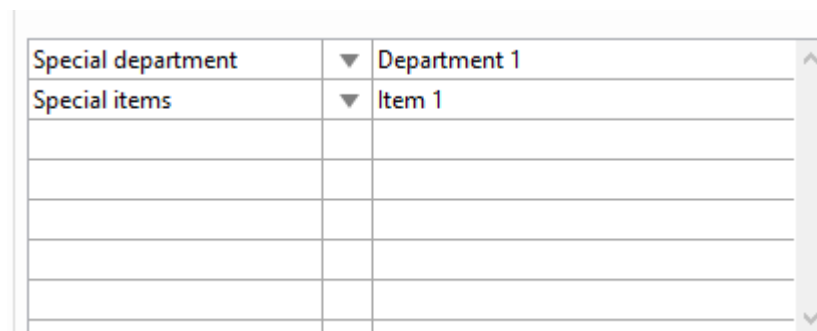
Batch update

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



A screenshot of a software interface showing a dialog box titled "Change client information". The dialog box contains two dropdown menus. The first dropdown is labeled "Client" and has "Discovery Centre Museum" selected. The second dropdown is labeled "Client Contact" and has "James Brown" selected.

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



A screenshot of a table with two columns. The first column contains labels for custom fields, and the second column contains the selected values. The table has a scroll bar on the right side.

Special department	▼	Department 1	▲
Special items	▼	Item 1	

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.

The screenshot shows a software interface for a 'Meeting Notes' activity. The title bar reads 'Meeting Notes' and the subtitle is 'Meeting with prospect on site'. There are icons for a checklist, a list, a printer, and an 'ACTIVITY' button. Below the title bar is a navigation menu with 'Meeting Notes', 'History & comments', 'Attachments', and 'Follow-ups'. The main content area is titled 'Linked activities (via "follow-up")' and contains a table of activity records. At the bottom, there is a checkbox labeled 'include this activity in view?' which is checked.

Activity Type	Created Date & Time	Subject and Details
Meeting Notes	25/11/2014 at 17:30:16	MEETING WITH PROSPECT ON SITE Discussed the option of a new website - budget circa £20k
Follow Up Call	25/11/2014 at 17:28:31	CALLED BACK 24/11/2014 - no answer 25/11/2014 - prospect requested a meeting
Call	25/11/2014 at 17:26:40	INITIAL COMMUNICATION Prospect requested sales info 20/11/2014 - sent standard pack

include this activity in view?

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.

New activity

Call

Initial communication

Follow-up ... Complete

Subject: Initial communication

Details: Prospect requested sales info
20/11/2014 - sent standard pack

Regarding: Hondura (020 3987 723)
Company: 1
Marketing & Communications PLC

Contact: [Dropdown]
Team: [Dropdown]
Owner: Mike Singleton

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.

New activity

Follow Up Call

Called back

Follow-up ... Complete

Subject: Called back

Details: 24/11/2014 - no answer
25/11/2014 - prospect requested a meeting

Regarding: Hondura (020 3987 723)
Company: 1
Marketing & Communications PLC

Contact: [Dropdown]
Team: [Dropdown]
Owner: Mike Singleton

Meeting notes

Meeting notes are recorded here.

Meeting Notes

Meeting with prospect on site

Follow-up ... Complete

Subject: Meeting with prospect on site

Details: Discussed the option of a new website - budget circa £20k

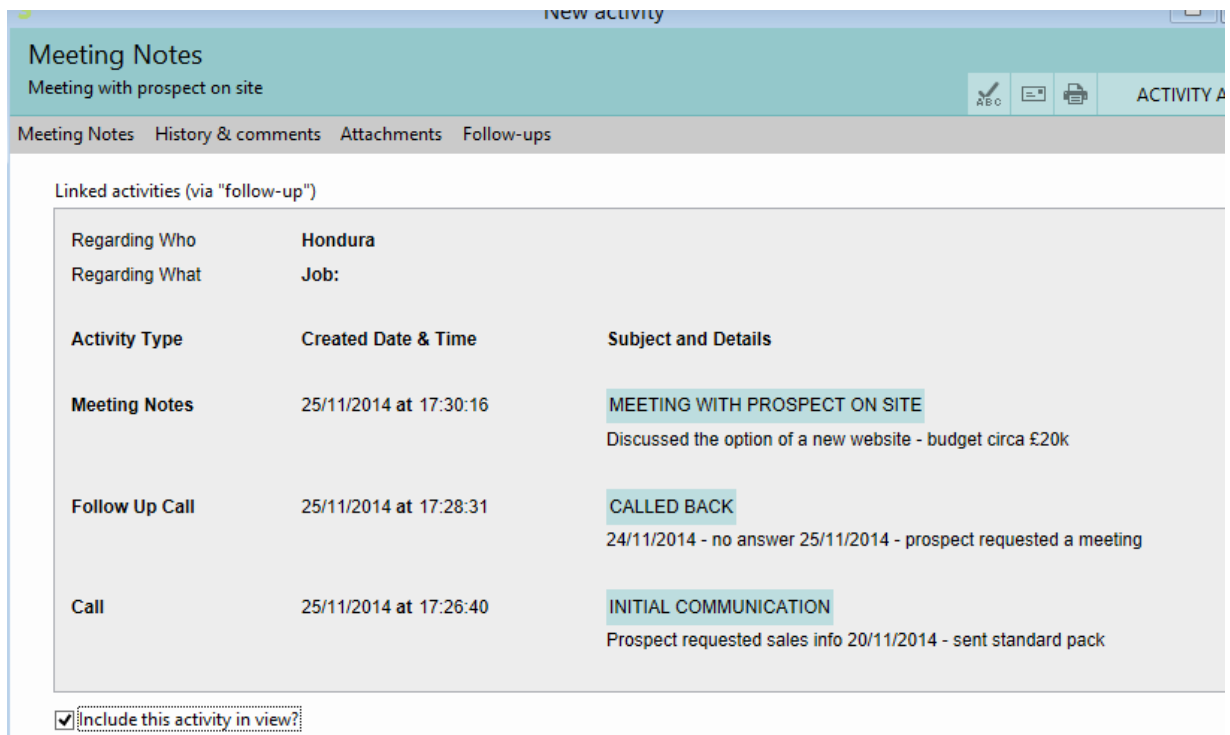
Regarding: Hondura (020 3987 723)
Company: 1
Marketing & Communications PLC

Contact: [Dropdown]
Team: [Dropdown]
Owner: Mike Singleton

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.



The screenshot shows a web interface for a CRM system. At the top, there's a header for 'Meeting Notes' with the subtitle 'Meeting with prospect on site'. Below this is a navigation bar with tabs: 'Meeting Notes', 'History & comments', 'Attachments', and 'Follow-ups'. The main content area is titled 'Linked activities (via "follow-up")' and contains a table with three columns: 'Activity Type', 'Created Date & Time', and 'Subject and Details'. The table lists three activities: 'Meeting Notes', 'Follow Up Call', and 'Call'. Each activity has a green highlight on its title in the 'Subject and Details' column. Below the table is a checkbox labeled 'include this activity in view?' which is checked.

Activity Type	Created Date & Time	Subject and Details
Meeting Notes	25/11/2014 at 17:30:16	MEETING WITH PROSPECT ON SITE Discussed the option of a new website - budget circa £20k
Follow Up Call	25/11/2014 at 17:28:31	CALLED BACK 24/11/2014 - no answer 25/11/2014 - prospect requested a meeting
Call	25/11/2014 at 17:26:40	INITIAL COMMUNICATION Prospect requested sales info 20/11/2014 - sent standard pack

include this activity in view?

Filtering the activities list

Activity criteria screen

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

Include		Active		Internal/external	
<input checked="" type="checkbox"/> Clients		<input type="radio"/> Active		<input checked="" type="checkbox"/> Internal	
<input checked="" type="checkbox"/> Prospects		<input type="radio"/> Inactive		<input checked="" type="checkbox"/> External	
<input checked="" type="checkbox"/> Leads		<input checked="" type="radio"/> Both			

Include	▼	Equal to		...	
Special date	▼	Equal to		...	12/11/2014
Department category	▼	Equal to	▼	...	

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.

Calendar bookings - Marketing & Communications PLC

26 January - 1 March 2015

Scope: 5 weeks From: 26/01/2015 Scale: WEEKLY DAILY VIEWS

26/01/15 - Week 5

	Mo	Tu	We	Th
Helen Robinson - Copywriting	Audi AG 1/00000730.001 New A6 launch to dealers Creative Direction Handler: User	Total Petrochemicals 1/00000543.001 Flash Movie for use by reseller sites 8 Page brochure of new	Total Petrochemicals 1/00000661.001 New 8 Page Offshore Products Brochure Art Direction	Gotham Dream Cars 1/00000656.001 A4 Brochure, 4 Page, Full Colour Design Handler: Nigel Unsworth
Paul Grant - Copywriting	Audi AG 1/00000659.003 New Visitor Site Design and Build Design & Definition	Total Petrochemicals 1/00000663.001 Retouch Images A4 Brochure, 4 Page, Full Colour	Audi AG 1/00000707.001 A8 CRM previous owners - Brochure Design	Audi AG 1/00000678.001 Summer Schools Brochure Creative Direction

Search... FIND FILTER PREFERENCES

	Client	Job phase	Status	Team	Han...	Charge code	Due date	Priority	Estimated	Booked	Bc
	Total Petrochemicals	1/00000543.001	Live	Creative	PD	Copywriting	We 20/01/2015			4	2 HI ^
✓ !	Gotham Dream Cars	1/00000654.001	Live	Creative, Developme	AJ	Creative Direction	Tu 02/09/2014	1		3	4 AI
	Audi AG	1/00000715.001	Special	Studio		Copywriting	We 21/01/2015			6	0
	Total Petrochemicals	1/00000672.001	Live	Creative, Studio	US	Project Management	Mo 26/01/2015			2	5 AJ
	Total Petrochemicals	1/00000672.001	Live	Studio	US	Artwork	Th 26/03/2015			6	4 US v

Description: 144 tasks in list

Preferences

You can change your default view via “Views/Preferences”

Interface settings

Standard calendar

Tree view with loading

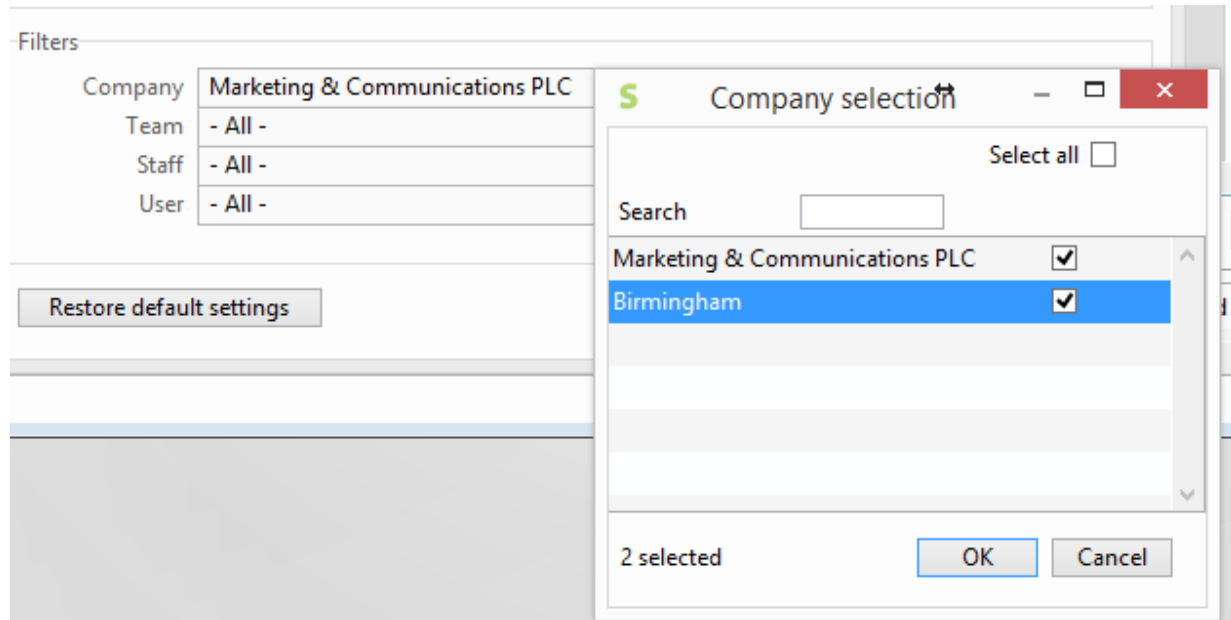
Note: The default view is still “Tree” view as before.

Multi-company feature

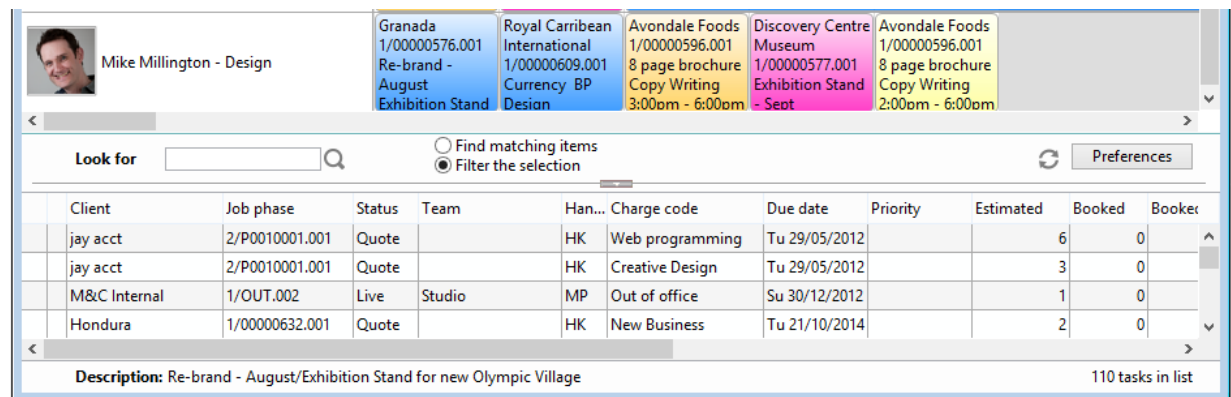
If you have resources that are working in multiple companies it is now possible to allocate work to them from jobs belonging to multiple companies on the same input screen.

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

Company 2

FM company number

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:

Time limit

Hours in a day

Start of day

End of day

Country

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

Calendar bookings - Marketing & Communications PLC

26 January - 1 March 2015

Scope: 5 weeks From: 26/01/2015 Scale: WEEKLY DAILY VIEWS

26/01/15 - Week 5

	Mo	Tu	We	Th
Internal Client 1/00000648.001 Holidays Holiday Handler: User				
Audi AG 1/00000730.001 New A6 launch to dealers Creative Direction Handler: User		Total Petrochemicals 1/00000543.001 Flash Movie for use by reseller sites 8 Page brochure of new	Total Petrochemicals 1/00000661.001 New 8 Page Offshore Products Brochure Art Direction	Gotham Dream Cars 1/00000656.001 A4 Brochure, 4 Page, Full Colour Design Handler: Nigel Unsworth
Audi AG 1/00000659.003 New Visitor Site Design and Build Design & Definition		Total Petrochemicals 1/00000663.001 Retouch Images A4 Brochure, 4 Page, Full Colour	Audi AG 1/00000707.001 A8 CRM previous owners - Brochure Design	Audi AG 1/00000678.001 Summer Schools Brochure Creative Direction

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”

- This user is NOT a Handler
- Out of office
- Email on calendar changes

Purchasing

Purchase invoice list

The list of purchase invoices now has totals.

Purchase invoices - Unposted view ▾									
Items: 32									
ACTIONS									
NEW	FILTER			Supplier ▾ - All -	Note: posted invoices are shown in r				
Invoice no	Supplier	Invoice date	Posting	Their ref	Net	VAT	Gross	Unallocated	Auth Ty
3434343	Able Printers Limited	31/10/2002	31/10/2002		10.00	1.00	11.00	10.00	lv
23432	Able Printers Limited	08/05/2003	08/05/2003	654645	1000.00	175.00	1175.00	900.00	lv
21431241	Able Printers Limited	13/05/2003	13/05/2003	65436543	1000.00	175.00	1175.00	1000.00	lv
1232123	Speedy Couriers	24/04/2003	24/04/2003	1133	825.00	175.00	1000.00	804.00	lv
7645645456	The Printing Shop	29/04/2003	29/04/2003	76456746745	1000.00	175.00	1175.00	0.00	lv
234324	The Printing Shop	06/05/2003	06/05/2003	6353465	1000.00	175.00	1175.00	0.00	lv
32432432	The Printing Shop	09/05/2003	09/05/2003	654544	1100.00	200.00	1300.00	0.00	lv
24321313	Greenwich Kaleidoscope	11/06/2003	11/06/2003	6547	1000.00	175.00	1175.00	0.00	lv
4767	Able Printers Limited	11/06/2003	11/06/2003	765675	1000.00	175.00	1175.00	0.00	lv
123123	Gemini Press	12/06/2003	12/06/2003	124312	1000.00	175.00	1175.00	0.00	lv
2343242	The Printing Shop	03/06/2003	03/06/2003	234324	-9.00	12321.00	12312.00	-9.00	lv
24343	The Printing Shop	01/08/2003	01/08/2003	1243124124	5000.00	1000.00	6000.00	510.00	lv
					£27676.91	£17143.42	£44820.33	£3315.00	
Supplier <input type="text" value="Able Printers Limited"/>									
Contact <input type="text"/>									
All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z									

Accounts links

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.

Invoicing

Billing plans

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

		Total est purc			Total val
EDIT		ACTIONS			
Month	Year	%	Planned value	Notional costs	Profit forecast
7 Dec	2011	50	\$840.00	0.00	500.00
7 Jan	2012	25	\$420.00	0.00	250.00
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
<hr/>					
Totals		75%	\$1260.00	0.00	750.00
Remaining to plan			\$420.00		

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.

Invoice address

Discovery Centre Museum 1/PROSPECT

Invoice contact

Select invoice address

- Blank -
- Blank -
- James Brown
- Jane Healy (accounts (i))
- Joe Davey

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

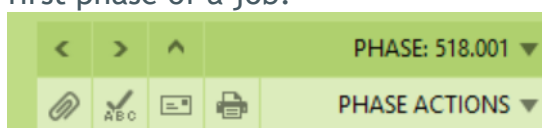
Support has been added for this software.

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 through 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:

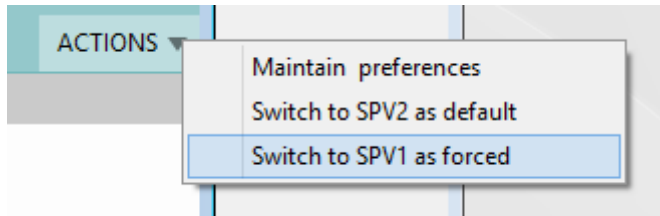
- Time sheets (read/write)
- Materials sheets (read/write)
- Expenses (read/write)
- Calendar (read only)

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

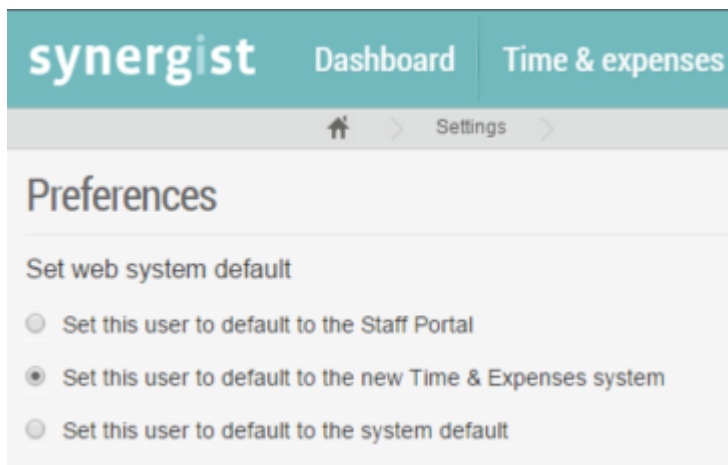
Note: Synergist API V2.2 can still be used as a read only API for Clients/Jobs/Activities

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.



END OF DOCUMENT
