Release notes

Synergist v16: April 2026

Revision 1.1: 12 May 2026

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

Contents

Jobs

Mark favourites and access key records instantly

A new Favourites feature lets you mark Organisations, Jobs, Phases and Stages for quick access. Click the star icon on any record to favourite it. Favourited records display a yellow star on their pill, making them visible throughout the system.

You can also favourite or unfavourite records by right-clicking on a pill, or select multiple records from a main list and use the new **Favourite** button to manage them in bulk.

To make the most of Favourites:

- A new My favourites system view shows only your favourited records
- The filter modal now includes a Favourites section for filtering by favourited organisations, jobs, phases and stages
- A Favourite column is available in the column picker so you can sort by favourited status

Sticky tabs when switching between Job and Phase levels

When you switch between Job and Phase levels, Synergist now remembers which tab you were on. If the same tab exists at the level you're switching to, it stays selected instead of jumping back to Details.

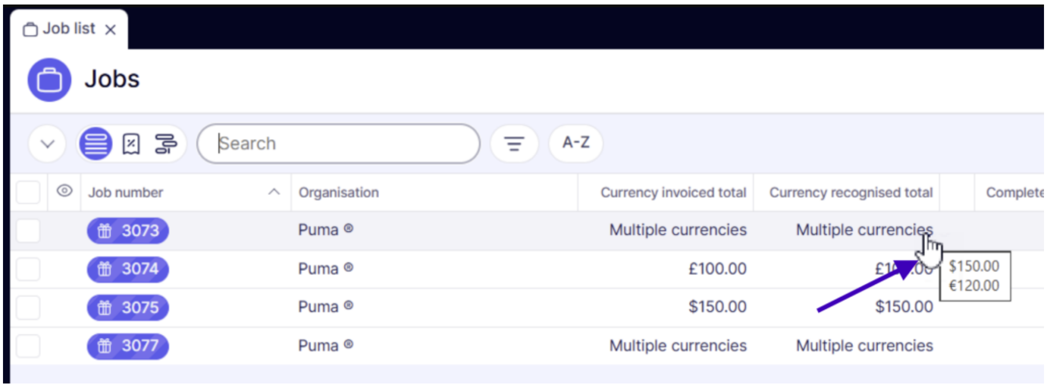
Task dependencies retained when copying a job or using a template

Task dependencies are now preserved when you copy a job or create a new job from a template. No more manually re-linking tasks after duplication.

Multi-currency columns on Job and Phase lists

Two new columns are available in the Job and Phase lists: **Currency invoiced total** and **Currency recognised total**.

When a job has been invoiced in a single currency, Synergist displays the value with its currency symbol. When a job has been invoiced in multiple currencies, the column shows "Multiple currencies". Hover over the text to see a full breakdown.

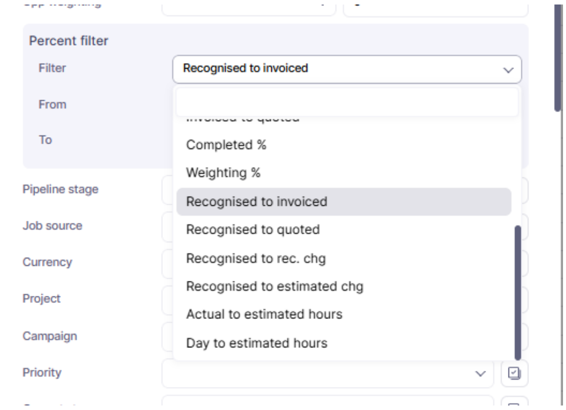


New revenue recognition filters on Jobs and Phases

If Revenue Recognition is enabled for your company, four new filters are now available in the Jobs and Phases lists:

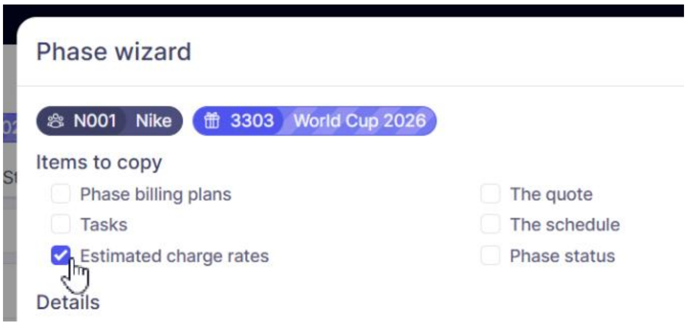
- Recognised to invoiced
- Recognised to quoted
- Recognised to rec. chg
- Recognised to estimated chg

Find them in the **Percent filter** dropdown under **By Job / Phase**.



Copy estimate charge rates when duplicating a phase

The Phase duplication wizard now includes an **Estimated charge rates** option under Items to copy. When selected, manual charge rates carry across to the new phase.



Six new profit columns on Job and Phase lists

Six additional columns are now available in the column picker:

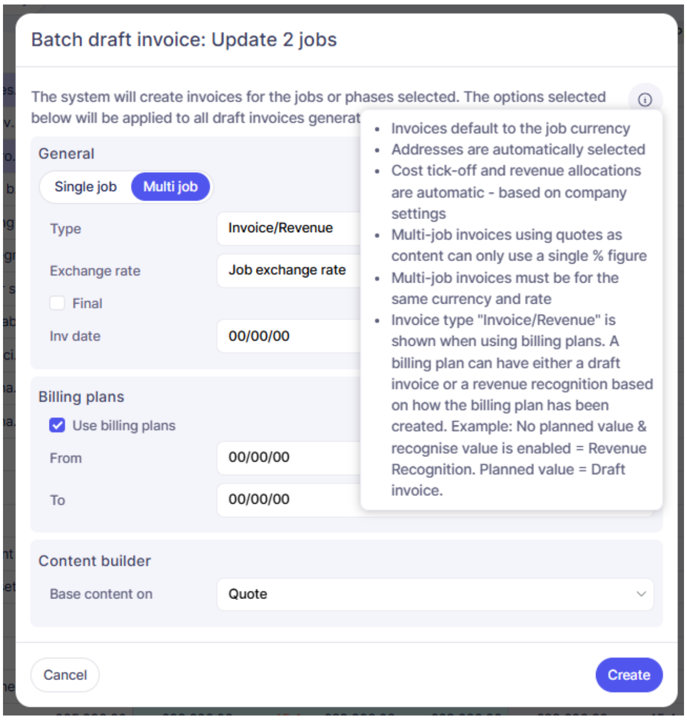
- Estimated GP%
- Actual GP
- Actual GP%
- Estimated NP%
- Actual NP
- Actual NP%

Zero-quantity material estimates now copy from templates

When creating a job from a template with Copy materials selected, zero-quantity material estimate lines are now included. Previously these were skipped.

Invoice type shown on batch draft invoice modal

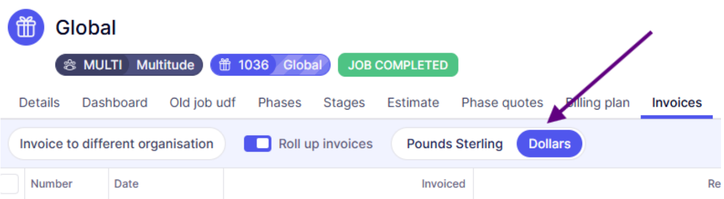
When creating batch draft invoices from the Jobs or Phases lists with Revenue Recognition and Use billing plans enabled, the invoice type now displays as **Invoice/Revenue**. An information icon explains how this relates to billing plans and revenue recognition.



Currency switch on Invoice tabs

If invoices exist in a currency different from your company's base currency, a new **currency switch** appears on the Invoices tab of Job and Phase records. Toggle between base currency and invoice currency to update values across Amount, Recognised, Deferred, totals, and Remaining to invoice.

The Recognised GP column always displays in base currency. Currency symbols update dynamically.



Currency switch on Billing Plan lists

A currency switch has been added to Job and Phase billing plan lists. Switch between your company's base currency and the currency of the jobs or phases shown. The switch also appears on the Phases sub list billing plan for non-base-currency jobs.

Add stages from the Gantt chart on non two-tier jobs

Stages can now be added directly from the Gantt chart at both job and phase levels on non two-tier jobs.

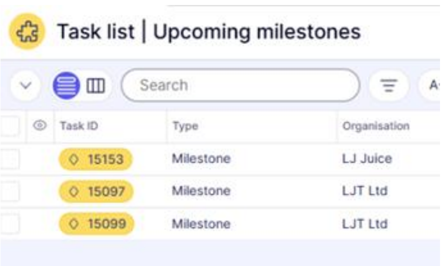
Note: Stages can only be added at job level when there are no stages on the phases, and vice versa.

Add milestones from the Gantt chart

Add milestones directly from the Gantt chart using the + button and selecting 'Add milestone'. Synergist creates them as a task with the task type set to milestone. If a milestone task type doesn't exist yet, one is created automatically. If multiple milestone task types already exist, you can choose which one to use in the Add milestone modal.

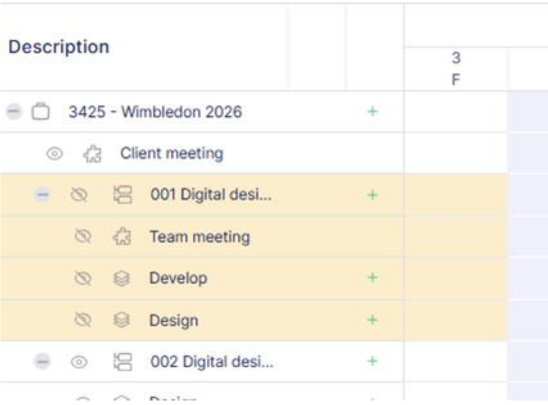
A new Upcoming milestones system view is available on task lists, along with a new milestone filter with Show/Hide options under Task/Attachment in the filter modal.

Milestone tasks display a distinct milestone icon on their pill, making them easy to distinguish from regular tasks.



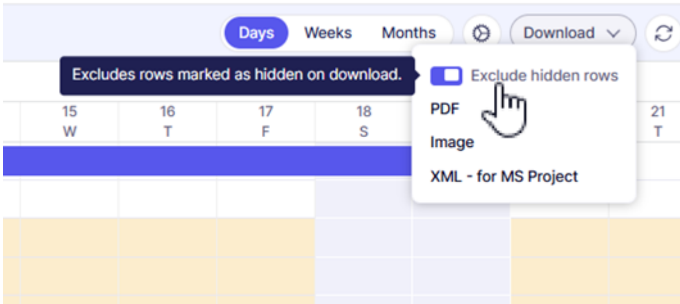
Hide items from Gantt chart exports

Rows in the Gantt chart can now be excluded from downloaded documents. Click the eye icon on any phase, stage or task row to hide it, or select 'Hide on Gantt export' on the detail page. When you download, select 'Exclude hidden rows' from the Download dropdown.



Hiding a parent item automatically excludes its children from the export. For example, if a phase has five stages and one stage is hidden, the download shows everything except that stage. If the phase itself is hidden, the phase and all its stages are excluded.

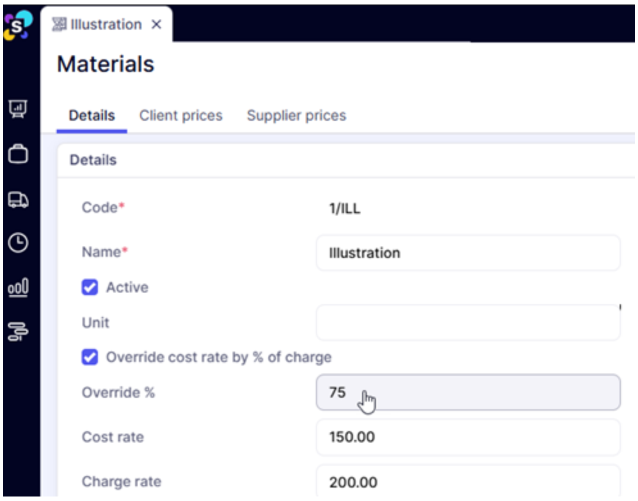
The 'Exclude hidden rows' switch resets each time the download dropdown is closed, so rows are never accidentally hidden from future exports.



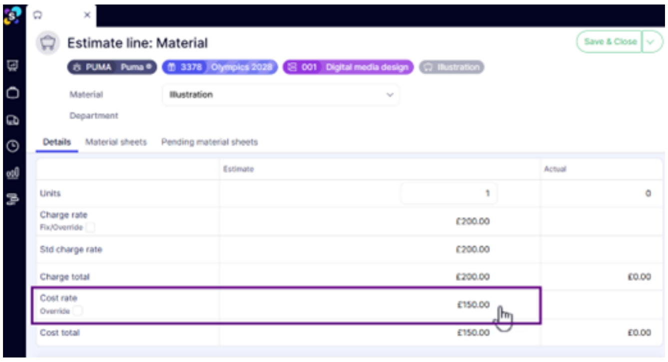
Material cost rate as percentage of charge rate

A new option lets you automatically calculate the cost rate of a material estimate line as a percentage of the charge rate. Useful when you use margin-based or percentage-based costing.

On the Details tab of a material record in File Maintenance, a new Override cost rate by % of charge checkbox lets you set a percentage. When ticked, Synergist calculates the cost rate on new estimate lines based on that percentage. For example, if the charge rate is £100 and the override is set to 50%, the cost rate will be £50. If the charge rate is edited on the estimate line, the cost rate updates automatically.



When clicking into material details from an estimate line, a new Override button and percentage field appear beneath cost rate. Ticking Override makes the cost rate editable, allowing a manual override that takes precedence over both the File Maintenance percentage and any changes to the charge rate on the estimate line.

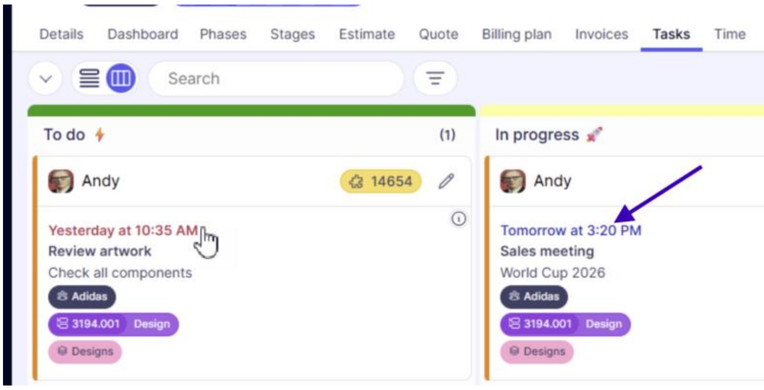


A new **Use job estimated cost rates** checkbox has also been added to job recost and batch update, ensuring the system uses current estimated cost rates (including any overridden values) rather than the original rates from File Maintenance.

Tasks

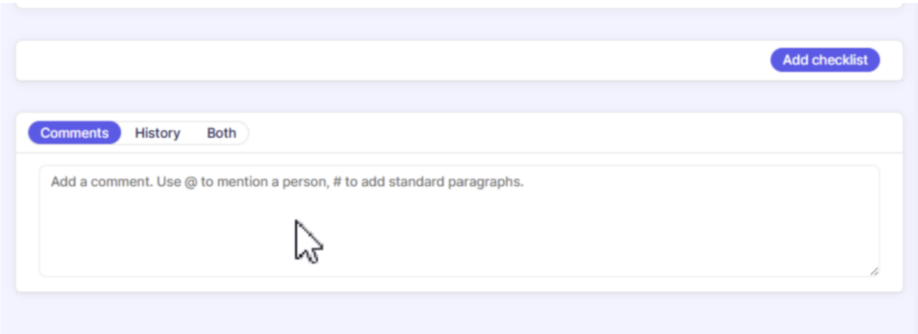
Improved due date readability

Task due dates are now easier to read. Font size has been increased, overdue dates appear in bold red, and non-overdue dates have changed from grey to blue.



Comment box always expanded

Based on user feedback, the Add comment button has been removed. The comment box is now always visible, making it quicker and clearer to add comments with fewer clicks.

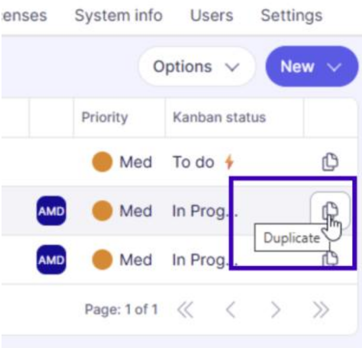


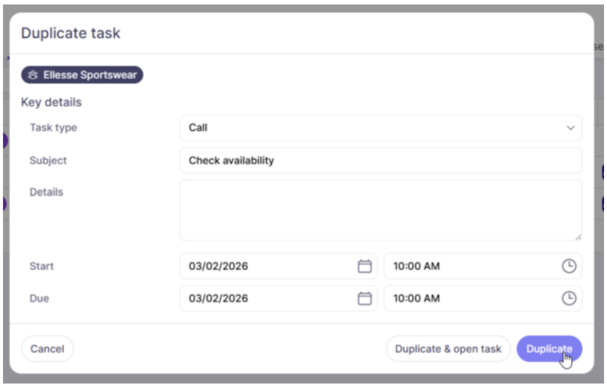
Reactions on task comments

You can now add reactions to saved comments on tasks. When someone reacts to your comment, you'll receive an email and in-app notification. Self-reactions don't trigger notifications.

Duplicate tasks from any sub list

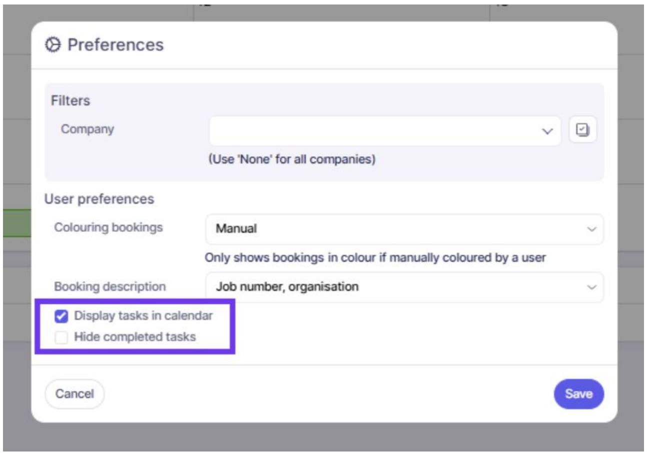
A new duplicate icon is available on all task sub lists, consistent with phase duplication. The Duplicate task modal lets you adjust key details, with dates auto-filled and fully editable.





Completed tasks in My Calendar

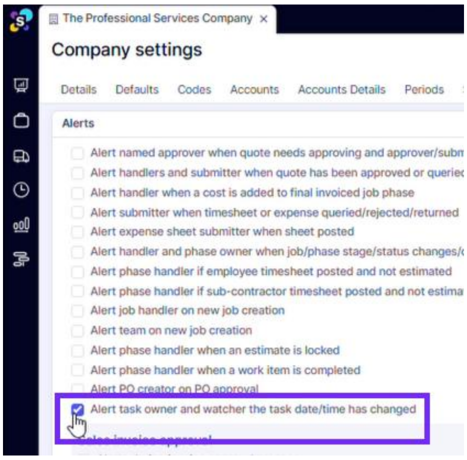
Completed tasks now appear in My Calendar by default, shown with a strikethrough. If you prefer a cleaner view, use the new **Hide completed tasks** option (off by default).



Date change notifications for task owners and watchers

Task owners and watchers now receive a notification and email alert when a task's start date/time or due date/time is changed.

Enable this in Company settings > Alerts tab > Alert task owner and watcher the task date/time has changed.



Custom fields on task Detail report

Custom fields are now included on the task Detail report.

Purchasing

Purchase invoice inbox

Purchase invoices can now be emailed directly into Synergist. Attach one or more PDFs to an email, send it to your Synergist inbox address, and the invoices are processed automatically. The email body is ignored. The sender receives a notification confirming whether the upload was successful.

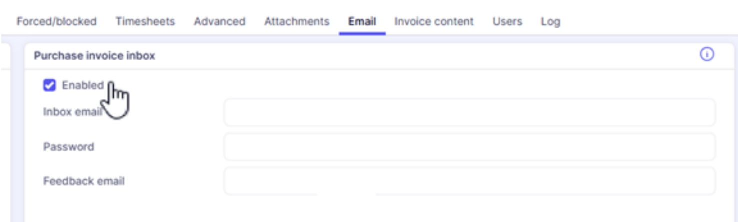
All successfully processed invoices appear on the Accounts link page.

The following currencies are supported:

(April 2026)

Currency name	Symbol	Accounting system currency code
United States dollar	$	USD
Euro	€	EUR
Sterling	£	GBP
Canadian dollar	$	CAD
Indian rupee	₹	INR
Japanese yen	¥	JPY
Swiss franc	Fr	CHF
Australian dollar	$	AUD
Renminbi	¥	CNY
Swedish krona	kr	SEK
Hong Kong dollar	$	HKD
Bazaars (crypto currency)		BZR

To enable, go to **Company settings > Email tab > Purchase invoice inbox**. The Feedback email field lets you specify an email account that will receive emails with any issues.



Note: This feature is included on the Enterprise tier but is a chargeable add-on for the Foundation and Professional tiers @£55/month. This includes up to 100 invoices per month. Additional invoices will be charged at 0.50p per invoice (prices as at May 2026). Please contact subscriptions@synergist.co.uk to add this module. The inbox email address and password are provided by our support team, once set up.

Bulk upload purchase invoices

A new Upload files button on the Accounts link > Purchases > Import purchases/expenses table lets you upload up to 20 purchase invoice PDFs at once. All successfully processed invoices appear on the Accounts link page.


Sage Intacct via API
Connected to Sage Intacct via API
Disconnect
Setup VAT codes
Sales
Purchases
Nominal journals
Show batches already posted
Import purchases/expenses
Import from Sage Intacct via API
Import from file
Search
PI inbox
Upload files
Upload multiple pdf purchase invoice files
Purchase/Expense
Account
Name
Type
Date
Document
Reference
Net amount
Tax amount
Purchase
1/Dollar
US $ Supplier
Invoice
018
£400.00
£80.00
Pounds Sterling
Purchase
1/Dollar
US $ Supplier
Invoice
017
£300.00
£60.00
Pounds Sterling

New columns on the Purchase Orders list

Five new columns are available in the column picker:

- Markup method
- Markup %
- Discount %
- Estimated markup %
- Estimated discount %

Date tracking on purchase orders

The **Estimate created date and time** now appears on the Purchase order details screen, so you can see when the original estimate was created.

Additional date columns are also available in the PO list column picker:

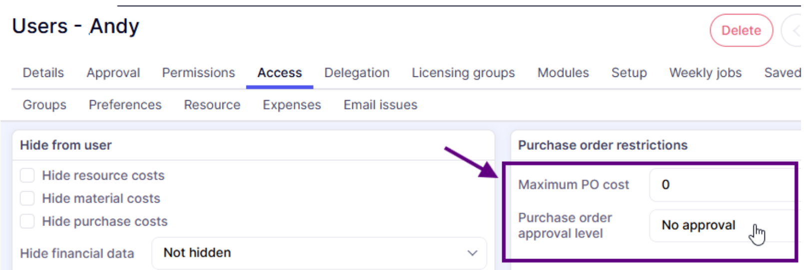
- Cancel date
- Date created
- Date ordered
- Date sent
- Estimated date
- Final delivery date
- First delivery date
- Real date - the date the estimate was created

Edit purchase order date after approval

The purchase order date can now be changed even after the PO has been approved.

PO approval cost field only shown when relevant

The **Max. PO approval cost** field is now hidden when the Purchase order approval level is set to No approval. It only appears when approval is set to Team only or Company-wide.



Timesheet users can now manage suppliers

Users with the Timesheet licence can now add, edit and delete suppliers, supplier prospects and supplier contacts, provided they have the relevant permissions.

Country column on Supplier list

Country is now available in the column picker on the Supplier list.

Import and export supplier prices

Import and export options are now available on the supplier Prices tab, matching the existing functionality on client price lists.

Set payment terms via API

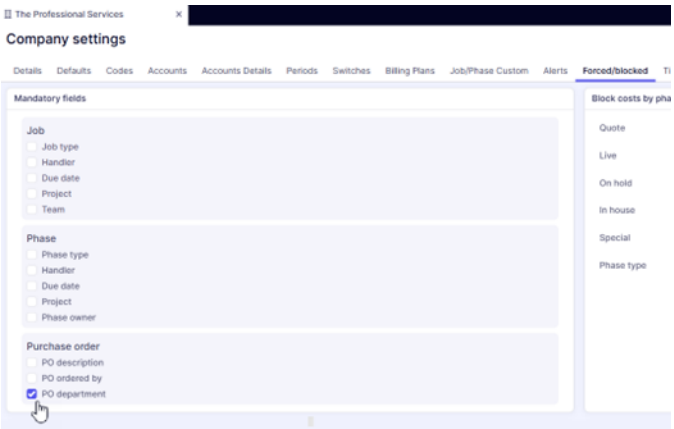
Supplier and client payment terms can now be set via the API. File Maintenance > Payment terms displays the internal values used for API mapping.

Purchase and expense department mandatory option

A new **PO department mandatory** field has been added to **Company settings > Forced/blocked tab**.

Note: This is only available when Departmental revenue analysis is switched on.

When enabled, the department field becomes mandatory for purchase estimates, tenders, purchase orders, expense estimates, direct expenses and expense entry. Expense sheets containing any lines without a department cannot be submitted.



Resourcing

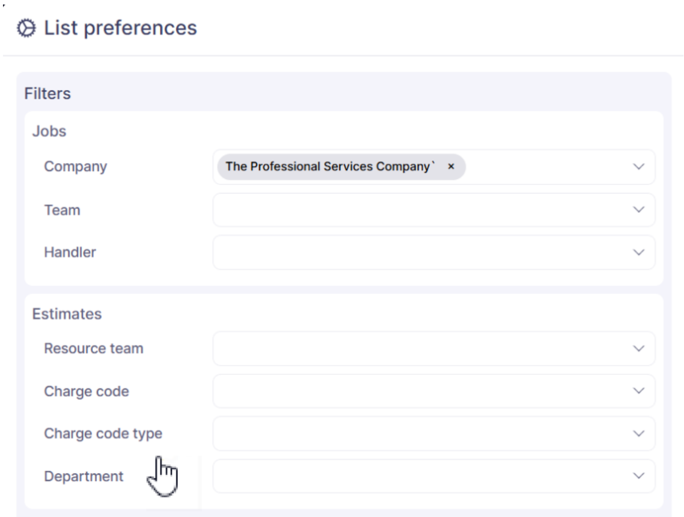
Default charge code on new bookings

When creating a booking in Resource Bookings, Synergist now automatically applies the staff member's default charge code. No more searching through the charge code list each time.

Charge code type and department filters

Charge code type and **Department** filters have been added to the Estimates panel.

Note: The Department filter only appears when Departmental revenue analysis is enabled in Company settings.



Improved batch actions for bookings

The ability to move and manage bookings has been consolidated into a new **Batch actions** menu at the top of the screen. Filter resource bookings by Organisation, Job, Phase or Stage, then apply any of these actions to the filtered set:

- Move bookings – shift filtered bookings forward or backwards by a set number of weeks
- Hide unused resources – show only people who match your filter
- Delete future bookings – remove all future-dated bookings in the current filter (cannot be undone)
- Revert to draft – change filtered bookings to draft (draft bookings have a hatched outline and are hidden from My Calendar)
- Confirm bookings – change filtered bookings to confirmed (visible in My Calendar)

Invoicing

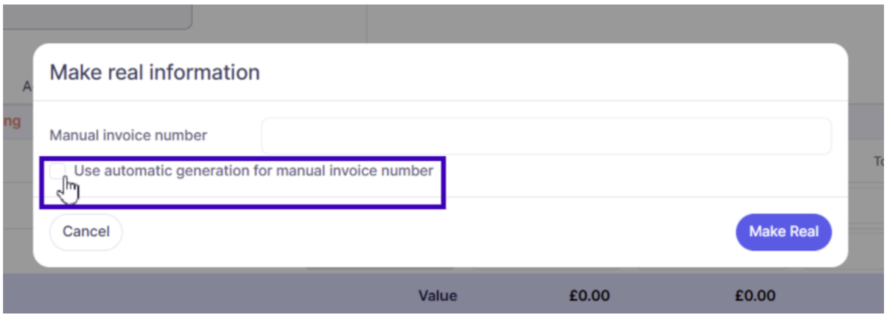
Lost opportunities are now locked

After an opportunity has been marked as Lost (previously "Deadened"), the opportunity and phase Status fields can no longer be changed.

Automatic numbering for manual invoices

When creating a manual draft invoice, you can now auto-generate the invoice number by ticking **Use automatic generation for manual invoice number**.

To enable this, set the **Manual invoice** field to a value greater than zero in **Company settings > Codes**. When enabled, the auto-generation checkbox is ticked by default. Untick it if you want to enter your own number.



Automatic prefix for manual invoices

Manual invoices can now include a prefix when automatic numbering is enabled. Set the prefix in **Company settings > Codes > Billing section > Manual invoice prefix**. The prefix is only applied when using automatic numbering.

Invoices now sorted newest-first on organisation records

The Invoices tab on Organisation records now displays invoices in descending order by default, with the newest at the top.

AI autofill now captures due dates

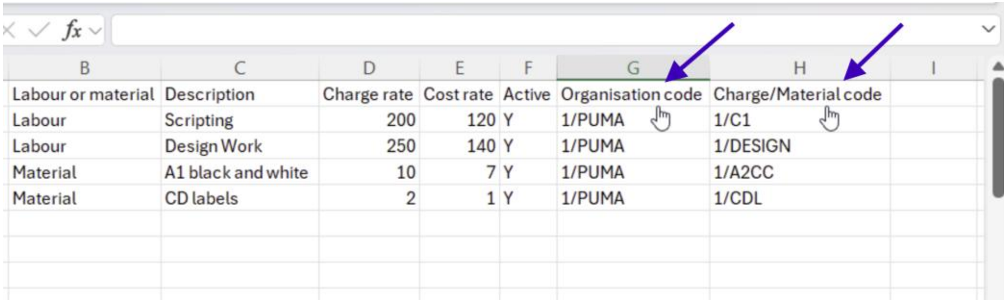
The purchase invoice AI autofill upload feature now populates the Due date on the purchase record when the date is present on the uploaded file. When no due date is found, it's calculated from the supplier's Payment terms or Days credit.

Reporting

Organisation and charge/material codes on price exports

Two new columns have been added to the organisation prices export:

- Organisation code
- Charge/Material code



B	C	D	E	F	G	H	I
Labour or material	Description	Charge rate	Cost rate	Active	Organisation code	Charge/Material code	
Labour	Scripting	200	120	Y	1/PUMA	1/C1	
Labour	Design Work	250	140	Y	1/PUMA	1/DESIGN	
Material	A1 black and white	10	7	Y	1/PUMA	1/A2CC	
Material	CD labels	2	1	Y	1/PUMA	1/CDL	

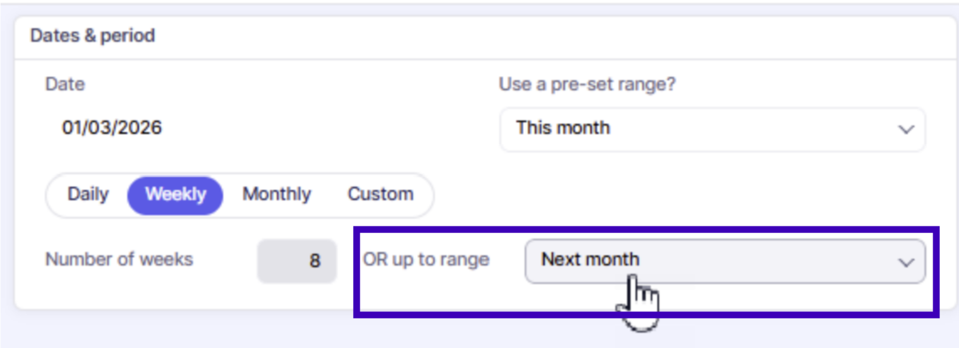
Department revenue analysis export

The Department analysis export now includes all columns from the Departmental Revenue Analysis screen, plus columns for invoiced/recognised values and net profit.

Past and future periods in Data Analytics

A new 'Or up to range' dropdown in Data Analytics lets you view past and future periods in the same report. Combine actuals with forward-looking data to get a projected position for the full financial year.

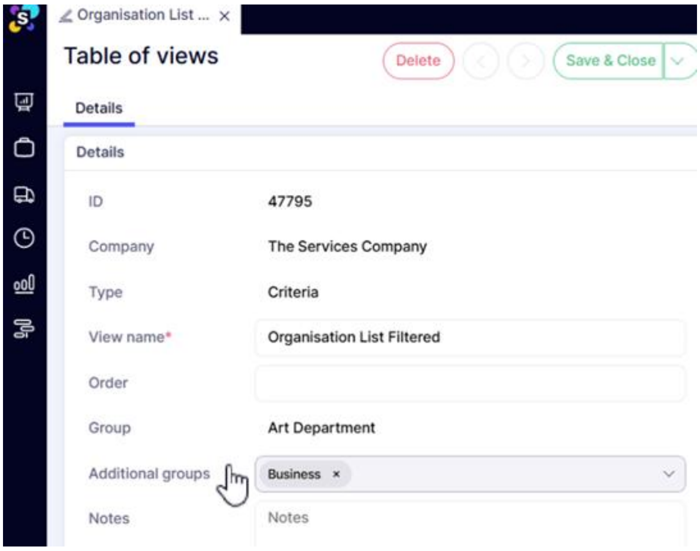
For example, see invoiced figures for completed months and billing plan projections for future months in the same financial year, giving you a projected position for the full year.



Share group views across multiple groups

Group views can now be shared with more than one group. A new **Additional groups** field lets you allocate a group view to other groups. Find it in File Maintenance > Table of views, then open the group view and set the additional groups.

Note: If the group that originally created the view is deleted, the view is removed from the table of views for all groups.



synergist

Navigation & usability

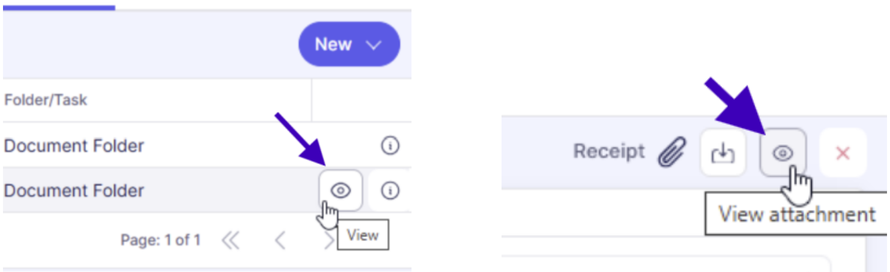
Search on weekly timesheets

A search box has been added to Weekly Timesheets, letting you search by organisation, job or phase.

Attachment quick-view

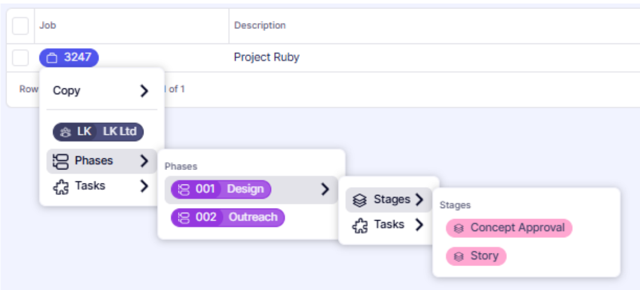
A new quick-view option has been added to the attachments list. Click the view icon to open an attachment in a modal without downloading the file or opening the full record.

Note: Requires S3 storage to be enabled.



Right-click pill navigation

Right-clicking on a pill now gives you navigation options. Depending on the level, you can jump between Phases, Tasks, Stages and the client.



Organisation pills

Pills have been added for Organisations:

- Client pills have a solid grey background
- Prospects have a striped grey background
- Leads have a light grey background

In the Organisation main list, the pill appears on the code column. In Jobs, Opportunities, Phases and Stages lists, the Organisation code is available in the column picker and displays as a pill.

Scroll to top button

A **Back to top** button now appears on lists when you scroll more than halfway down.

Clear button on time-type custom fields

An X button has been added to Time-type custom fields, letting you clear the entry in one click.

Quote approval emails now show the requestor's name

Quote approval email alerts now include the name of the person who requested the approval.

Automatic financial period creation

Synergist can now create financial periods automatically, which is particularly useful for dashboards.

In **Company settings > Periods tab**, the Financial period type dropdown has two options:

- Monthly – periods are automatically managed by Synergist and become read-only in File Maintenance
- Non-standard – you create periods manually with no restriction on length

Terminology updates across the system

Several labels have been updated for clarity and consistency:

- "Dead" system view renamed to "Lost"
- "Planned" column in billing plans renamed to "Planned inv" (and "Planned invoicing" in column preferences list)
- "Departmental costing" export renamed to "Departmental time"
- "New organisation" button renamed to "New client"
- "Amount" column on Job/Phase Invoice tab renamed to "Invoiced"

Mobile App

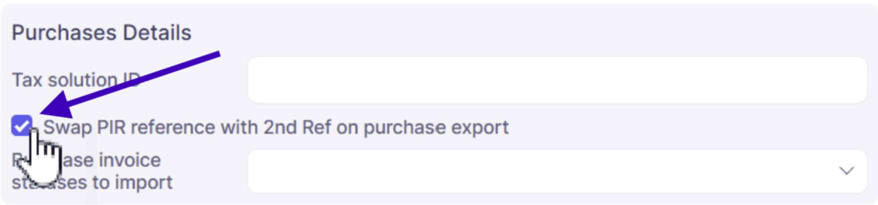
MFA and SSO support

The mobile app now uses the standard Synergist login screen, which means MFA and SSO are fully enforced on mobile.

Integrations

Sage Intacct: swap PI reference

A new checkbox, **Swap PIR reference with 2nd Ref on purchase export**, is available in Company settings > Account details. When enabled, the PIR reference and second reference are swapped when posting purchase invoices to Sage Intacct via API. If the second reference is blank, no swap occurs.

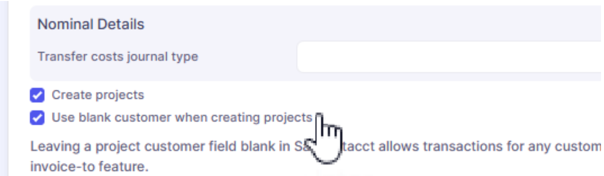


Sage Intacct: posting date mapping

When posting purchase invoices to Sage Intacct via API, Synergist's purchase invoice posting date is now placed into the GL posting date field in Intacct.

Sage Intacct: relaxed invoice-to rules

A new **Use blank customer when creating projects** checkbox is available on the Accounts Details tab (when Sage Intacct via API is selected and Create projects is ticked). Leaving the project customer field blank in Intacct allows transactions for any customer to be posted, giving more flexibility with the invoice-to feature.



Sage Intacct: tax code mapping

A **Setup VAT codes** button has been added to the Accounts link page for Sage Intacct via API connections. Click it to launch the VAT codes modal, then press Get codes from Sage Intacct via API to map sales and purchase tax codes.

Sage Intacct: populate project dates from Synergist

When Create projects is enabled for Sage Intacct, two new dropdown fields appear in Accounts Details:

- Project begin date to use
- Project end date to use

Options include None (don't send), Default (sends the Synergist job start/due date), and any job custom fields with a Date field type.

API

Expense sheet: paid status for purchase invoices

A new action is available on the Expense Sheet API to obtain the paid status for related purchase invoices.

Nominal analysis check before posting

A new validation check has been introduced for posting purchase invoices when PI analysis tied to allocations is enabled. Synergist now verifies whether the nominal analysis has changed since it was last built. If a change is detected, you’ll be prompted to rebuild the analysis before posting.

Transfer costs: nominal journal and rule tightening

A new validation check has been introduced for posting purchase invoices when PI analysis tied to allocations is enabled. Synergist now verifies whether the nominal analysis has changed since it was last built. If a change is detected, you'll be prompted to rebuild the analysis before the invoice can be posted.

When transferring purchase or expense costs between jobs or phases (including transferring an entire phase to another job), Synergist now checks whether related purchase invoices have been posted and transferred to the accounting system. If they haven't, the transfer is prevented. This ensures any resulting nominal journal reflects fully committed data.

Once criteria are met, a nominal journal is created automatically. When posting to Sage Intacct with Create projects enabled, the journal is additionally broken down by job. If no change to the nominal analysis results from the transfer, no journal is created.

A new field in **Company settings > Accounts details** lets Sage Intacct customers specify the journal type for transfer-cost journals.

Note: Requires PI analysis tied to allocations to be enabled, the Nominal builder to be used for purchases and expenses, and a connected accounts package that supports nominal journal posting.