Release notes

Synergist v17: August 2026

Revision 1.0: 7 August 2026

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

Contents

Jobs

Internal notes on estimate lines

Internal notes can now be added to individual estimate lines for time, purchases, materials and expenses, giving your team somewhere to capture context that shouldn't reach the client. Previously, the only text field on an estimate line was Quote detail, which is customer-facing and pulls through to quotes.

Use it to record why a line changed, explain an adjustment, or leave context for colleagues, particularly useful where DRA adjustment lines are used to shift department splits. The field expands as you type, and notes stay internal and never appear on client-facing quotes.

Delete jobs, phases and stages containing tasks in one step

Previously, deleting a job, phase or stage that contained tasks meant deleting each task first. Now, if the only thing standing in the way is tasks (with no hard data such as timesheets or costs attached), Synergist prompts for confirmation and removes the tasks automatically as part of the deletion.

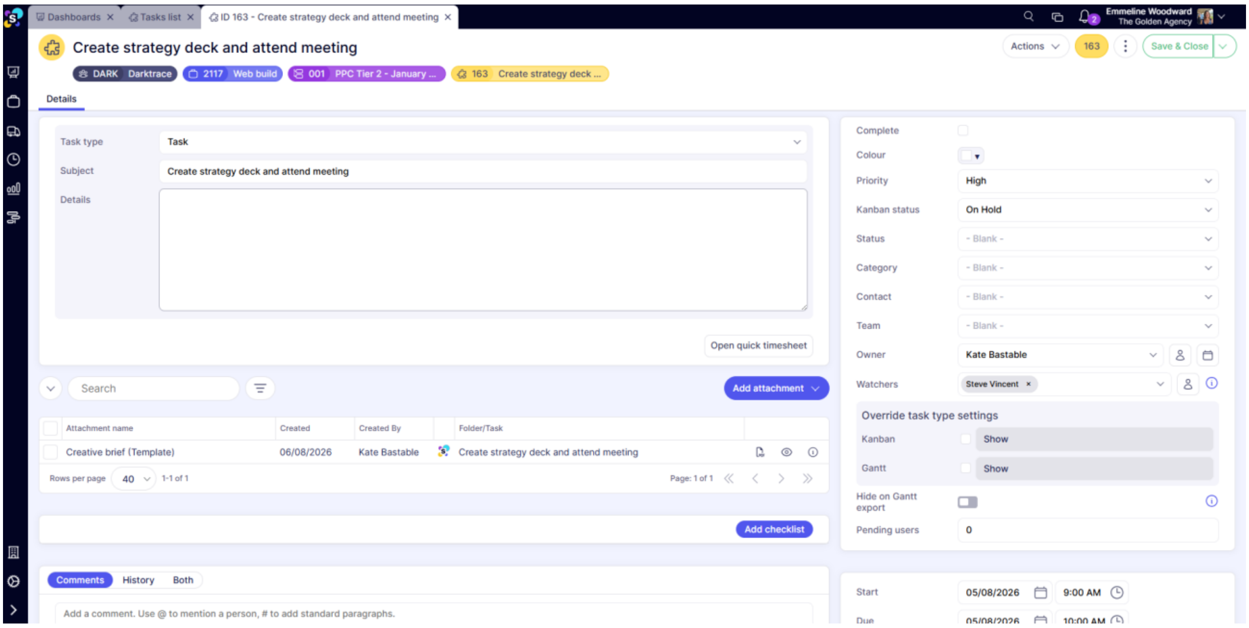
Hard blockers such as logged time, invoices or purchase costs are still enforced and will prevent deletion, as before.

Tasks

Task attachments moved to the Details tab

Attachments on tasks have moved from their own tab onto the Details tab, sitting below the details box. That's one less click, and less chance of an attachment being missed.

Files can now also be added by dragging and dropping them straight onto the task.



Clearer icons for editing and deleting task comments

The edit and delete options on task comments now have their own icons, a pencil to edit and a red X to delete, replacing the previous three-dot menu.

Deleting a comment now shows a confirmation prompt to help prevent accidental deletions, and the action icons are hidden while a comment is being edited to keep things tidy.

Timesheets

Cost rates for freelancer overtime

Agencies using freelancer timesheets can now set separate purchase order cost rates for overtime (OT1 and OT2) on each freelancer resource record.

When timesheets containing overtime hours are converted to purchase orders, Synergist applies the correct overtime rate to each split PO line automatically, removing the need for manual workarounds. Particularly useful if you run a large freelance workforce.

Smarter cost handling when converting freelancer timesheets to POs

When converting freelancer timesheets into purchase orders from the Posted Timesheets list, Synergist now handles cost totals based on how the PO is created.

Choose Create Purchase Orders on the originating job or phase, and the timesheet cost totals are zeroed out automatically, so costs are only counted once. This means you can track live resource costs through the month as timesheets come in, then switch cleanly to the PO cost rate on conversion.

Choose Create Purchase Orders on a Single Phase - Internal Job instead, and the timesheet cost totals are retained, since the costs sit on the internal job.

No setup is needed. Synergist applies the right behaviour automatically based on the method you choose.

Cleaner layout for the daily timesheet summary view

The daily timesheet list summary view now shows Client, Job, Phase and Stage as separate columns, with totals moved to the bottom of the table. This brings the view in line with the pill-style layout used elsewhere in Synergist.

Purchasing

Set and track purchase budgets by phase

A new Purchase Budget feature lets you set an overall spend budget for purchases on a phase, then link individual purchase orders, draft POs and approved expenses to it.

The budget tracks estimated cost against everything linked to it in real time, so you can see remaining budget at a glance, including separate breakdowns for approved and unapproved purchases when PO approval is enabled.

Purchase budgets appear on the phase estimate as a single rolled-up line. Click through to open the budget and see a focused view of all linked costs.

Filter purchase orders by multiple types at once

The Real, Draft and Estimate PO type filter on the purchase order list now supports multi-select, so you can view a combination of PO types in a single list.

A new default system view, All drafts, has also been added for quick access to draft purchase orders.

Departmental analysis on purchases without enabling DRA

You can now assign departments to purchase orders and expenses without needing to turn on full Departmental Revenue Analysis. A new company-level setting switches on departmental analysis for purchases independently, giving finance teams more flexible nominal analysis with less system-wide impact.

Invoicing

Use invoice auto allocations and revenue recognition together

Invoice auto phase allocations and revenue recognition can now be switched on at the same time. Previously, using one meant you couldn't use the other.

With both active, Synergist recognises all revenue automatically by default, but you can still override allocations on individual invoices when you need to. This cuts down manual steps considerably for agencies raising large volumes of repeat invoices.

Billing plans now respect your current accounting period

Billing plans now follow the Current Accounting Period setting in Company settings. You can no longer create, amend or delete billing plans that fall before the start of the current period, bringing billing plans in line with the period-locking rules already used elsewhere in Synergist.

Client code available as a column on invoices, jobs and phases

Client code, and bill-to client code, can now be added as a column on the invoices, job phases and jobs lists. Useful for matching invoices against client records in external finance systems using a unique identifier rather than the client name.

Paid date available as a column on invoice lists

If you're connected to an accounts package such as Xero, you can now add a Paid date column to the Invoice and Proforma Invoice lists. Previously, the paid date was only visible by hovering over the Paid Status indicator on individual invoices.

This makes it easy to scan and compare payment dates in bulk without checking back in your accounts package. The paid date is also now shown in the Paid Status tooltip.

Dashboards and reporting

Filter dashboards by group

The Personal dashboard and Data Analytics dashboard now include a Views filter, so you can show only the tiles or reports that belong to specific categories: System, Company, Group or My Views. Your selection is saved and remembered between sessions.

Refresh all Data Analytics tiles in one click

A new Refresh All button on the Data Analytics dashboard updates every visible tile and chart in a single click, saving you refreshing them one by one. Particularly handy when you're working with live data.

Report on Opportunities by department in Data Analytics

Opportunities can now be reported on in Data Analytics alongside jobs, with Department available in rows or columns. Previously, department filtering worked for other data types but wasn't available for Opportunities.

Reporting uses phase-level data by default, consistent with other data types, so you can break down estimated time, actual time, billing plans and revenue by department for Opportunities the same way you already could for jobs.

Custom date fields now support relative date filters

Custom date fields can now use pre-set relative date ranges, such as This Month, Next Quarter or This Financial Year, across saved views, reports, tiles and Data Analytics dashboards.

Previously this was only available on system date fields, so custom date filters had to be maintained manually. Now they update dynamically, just like standard date fields.

Next year date range added to Data Analytics reports

Next year and This year have been added to the pre-set date range filter on Data Analytics reports, so reports can automatically show data for the current or upcoming financial year with no manual date maintenance.

Supply type added to the WIP Retro Detail report

The WIP Retro Detail export report now includes a Supply Type column, making it easier to analyse costs by supply type directly from this report.

“Final invoice” renamed to “Closed date”

The label Final invoice has been updated to Closed date across Synergist, including Data Analytics fields such as Closed date (Phase) and Closed date (Job). This makes the field name clearer and more consistent with how the data is actually used in profitability and period-based reporting.

Integrations

Send quotes for signature with DocuSign

Synergist now integrates directly with DocuSign, so you can send quotes for electronic signature without leaving the system.

Once you've connected your account in the new Integrations area in Utilities, send a quote for signing straight from the Quotes tab on a job or phase. Choose a DocuSign template and pick the recipient from your client contacts.

Envelope status is tracked in real time (Sent, Delivered, Voided, Cancelled or Completed), so your team always knows where a document stands. Once a document is signed and marked Completed, it's saved automatically as an attachment against the job. No manual filing required.

Import expenses directly from Pleo

Synergist now integrates directly with Pleo, making it straightforward to bring employee expenses into Synergist without manual data entry.

Once you've enabled Pleo in Company Settings and entered your Pleo API key, expenses prepared and exported from Pleo can be pulled straight into Synergist with a single click of the new Import expenses from Pleo button in Accounts Link > Purchases.

The integration supports out-of-pocket and mileage expenses in any currency, maps tax codes, categories and department tags to their Synergist equivalents automatically, and attaches receipts to the imported records. Any errors, such as unrecognised job codes or missing department information, are flagged clearly before anything is posted.

Sage Intacct: define location by nominal segment

The Intacct location can now be defined by the fourth nominal segment rather than relying only on the company-level setting. Leave the location field blank in Company Settings and Synergist will use the transaction location from segment 4 automatically. Useful for multi-entity setups.

AccountsIQ: swap references on purchase invoice export

If your accounts link is set to AccountsIQ, you can now choose to swap the first and second reference fields when exporting purchase invoices. Turn on the new "Swap PIR reference with 2nd Ref on purchase export" setting on the Accounts Details page, and the two references switch over automatically during export.

This gives you more flexibility in how purchase invoice data maps across to AccountsIQ, with no manual adjustment needed afterwards.

Paid status sync limited to 6-hourly intervals

The ‘**Online Accounts Paid Status’** scheduled event, which syncs paid status from connected accounts packages such as Xero, can now only be set to run at intervals of 6 hours or more.

This keeps Synergist within the API usage thresholds increasingly being imposed by third-party accounts providers. Any existing schedule set to run more often than every 6 hours will automatically be treated as 6-hourly. No action is required unless you'd like to review your current settings.