

synergist[®]

Version 12.2 - Release Notes

Synergist Desktop Interface

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Synergist v12.2 release (desktop version)

Overview

Most of the developments in the Synergist v12.2 release relate to the Synergist browser interface, or are features that affect both interfaces and these are covered in the Synergist v12.2 Release Notes – Browser Interface document. However, there are some developments that relate to the 4D client (desktop) version of Synergist, or require detailing in the desktop documentation. These are detailed in this document.

Technical Requirements

Synergist v12.2 requires 4D v16.6 The server upgrade will be performed automatically, but users of the desktop interface will need to download a new version of the desktop application in time for their server upgrade. Customers will be notified in advance of the server upgrade and links to the new desktop application will be included at the time.

Synergist v12.2 has the following minimum system requirements:

Server:

Windows Server 2008 R2 SP1 or later
Or
Mac OS X El Capitan v10.11.6 or later

Desktop:

Windows 7 (SP1), 8 or 10 Pro
Or
Mac OS X El Capitan v10.11.6 or later

Accounts links

Kashflow integration

2nd reference or job number (depending on settings) now output to the appropriate Kashflow field and are no longer added to the line description.

Activities & attachments

Comments/history - alerts

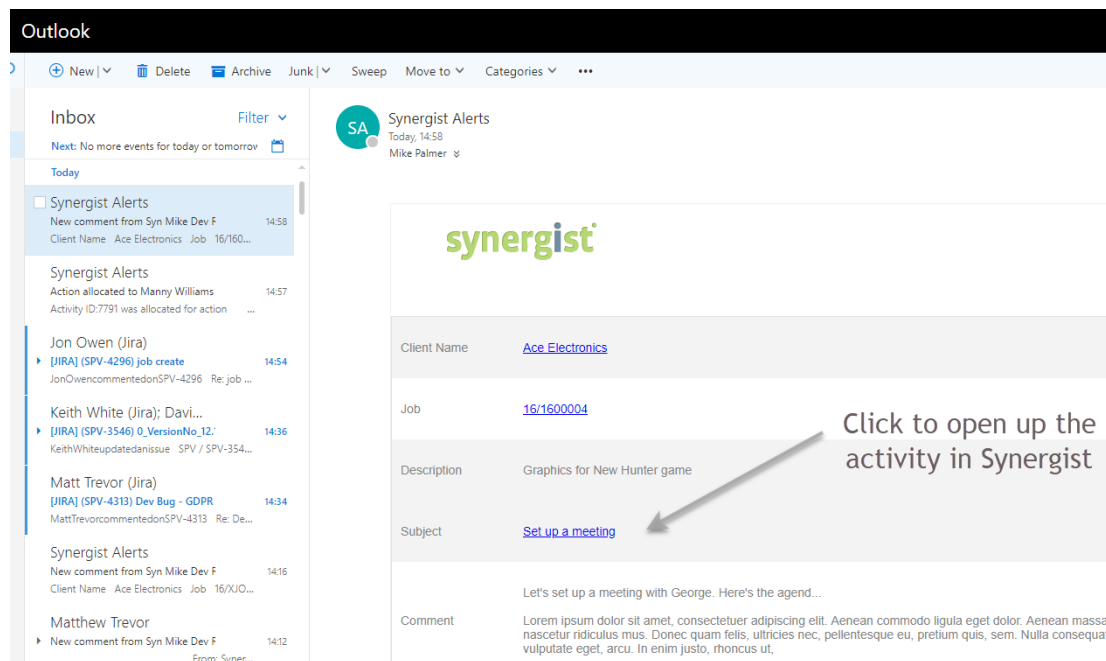
If the 'immediate alert' flag is set on an activity, any comments added to the activity will send Synergist alerts to the activity owner and secondary owners (called 'others').

The alert will have links that enable the recipient to open the job/activity to see the rest of the thread.

Email alert

The alert generates an email to all the parties allocated to the activity or related job (e.g. activity owners or internal job contacts or handler).

If the user clicks the links in the email, the Synergist browser interface opens on the appropriate record. See section on [Multiple browser tabs](#) in the 'Advanced features' section.



Billing plans

Billing plan report/export

Additional column added for recognized value.

Revenue recognition

It is now possible to incorporate revenue recognition into billing plans. This will only affect systems that are set up to use 'Revenue management'. See the 'Revenue Management' section of these release notes for more information on this feature.

Looking at the billing plan tab of a job/phase, there is a new column that shows how much revenue the user intends to recognize when invoicing each month. The user may wish to recognize the entire billed amount, or perhaps just a portion of the amount billed.

Billing plan item

Opening up an individual plan (typically the plan for a specific month), you can see there is a figure to 'recognize'. The profit forecast is no longer using the 'planned value' it is looking at the recognized value - less costs.

Billing plan		Total quoted	£375.00
Ace Electronics		Total est purchase costs	£0.00
16/au00023.001			
Website update			

Planned values			
%	Planned value	Notional costs	Profit forecast
50	£187.50	£100.00	£20.00
Currency	£215.63		

Recognized	120.00
------------	--------

Invoicing the billing plan

An invoice can be generated from one or more billing plan items.

Website update
Ace Electronics

Details Sales info Financial **Billing plan** Phases Estimate Phase quotes Pending Activities Attachmen

Total value quoted 375.00

Phase	Month	Year	%
001	Jun	2013	50
001	Aug	2013	50

Using QUOTE as content:-
 Create invoice based on selected billing plan
 Create invoice using wizard based on selected billing plan

Using BILLING PLAN as content:-
 Create invoice based on selected billing plan
 Create invoice using wizard based on selected billing plan

Re-calc billing plans
 Use AUTO billing plans for this job

Invoice generated from billing plan

As you can see, the invoice is for the planned value.

Job: 16/au00023
Ace Electronics

Invoice Inv date 06/04/2018 Order no
 Final Inv no D1600222 Job no 16/au00023.001
 Website update

Details Content **Jobs/phases invoiced** Allocated costs Address Financial Billing plan Notes Phase Allocations

Description	Quantity	Unit price	Total
au00023.001 Website update	1	£187.5000	£187.50

Deferring income

However, on clicking the 'Auto' button to allocate revenue - notice only part of the billed value has been recognized (as defined in the billing plan). The rest of the income has been deferred.

Details Content Jobs/phases invoiced Allocated costs Address Financial Billing plan Notes **Phase Allocations**

Job
Phase quote 0.00 Already deferred 0.00 Note: Values for phase allocations are in base currency

Job phase	Description	Type	PO Cost	Time	C	Already recognized	Recognize now	Total recognized	Total billed	Deferred now	Deferred total
16/au00023.001	Website update	DES	0.00	4.00	N	0.00	120.00	120.00	187.50	67.50	0.00

Auto allocate
 Cost Actual Quote
 Charge Estimate Billing plan
 Tickoff **Auto** Clear

Value	£120.00	£120.00	£187.50	£67.50	£0.00
Target total value					
Difference					

Clients & Contacts: GDPR

GDPR – General Data Protection Regulation

New features have been added to Synergist to help users achieve compliance with the recent changes to the law regarding data protection.

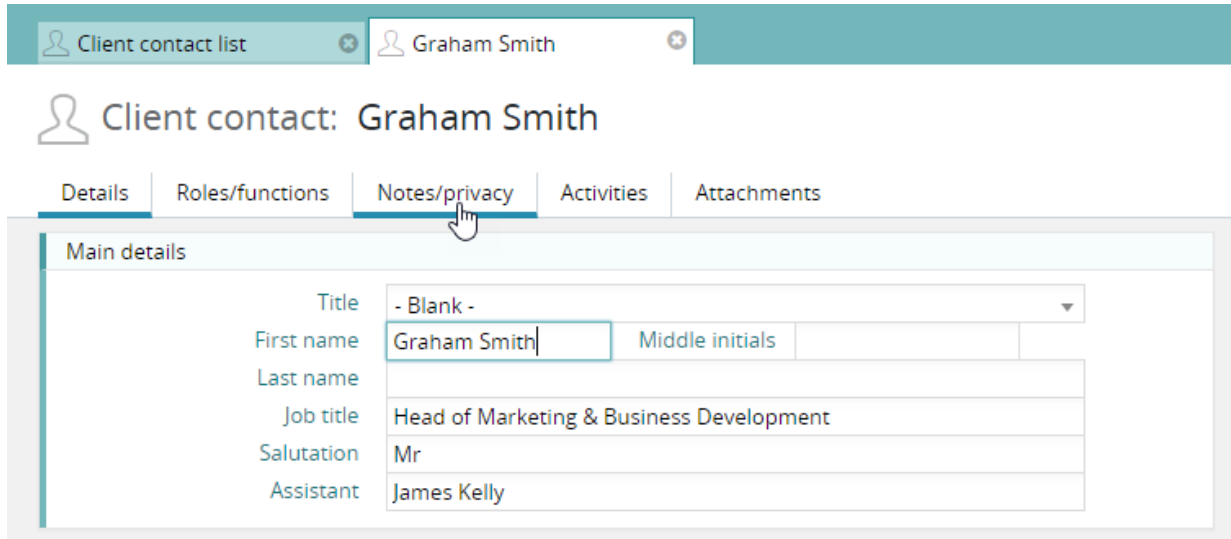
The new features affect the client contacts area where you may be holding data that needs reviewing to ensure compliance with the new rules. The key to this ensuring you can record whether a contact has explicitly 'opted in' to communications with your company, when this opt-in authority was obtained, and from which system/source it originated.

It is also important to track how long you have had the authority and whether this has effectively expired – at which point you might want to either get confirmation that the contact still wishes to be opted-in, or you may even wish to clear down any data that is no longer relevant (e.g. social media info, phone numbers etc.)

Since it would be very time consuming to set these new fields manually we have also added features for enhanced querying of the data (including selecting a batch of contacts by pasting in a list of email address, and new batch update features

The client contact record

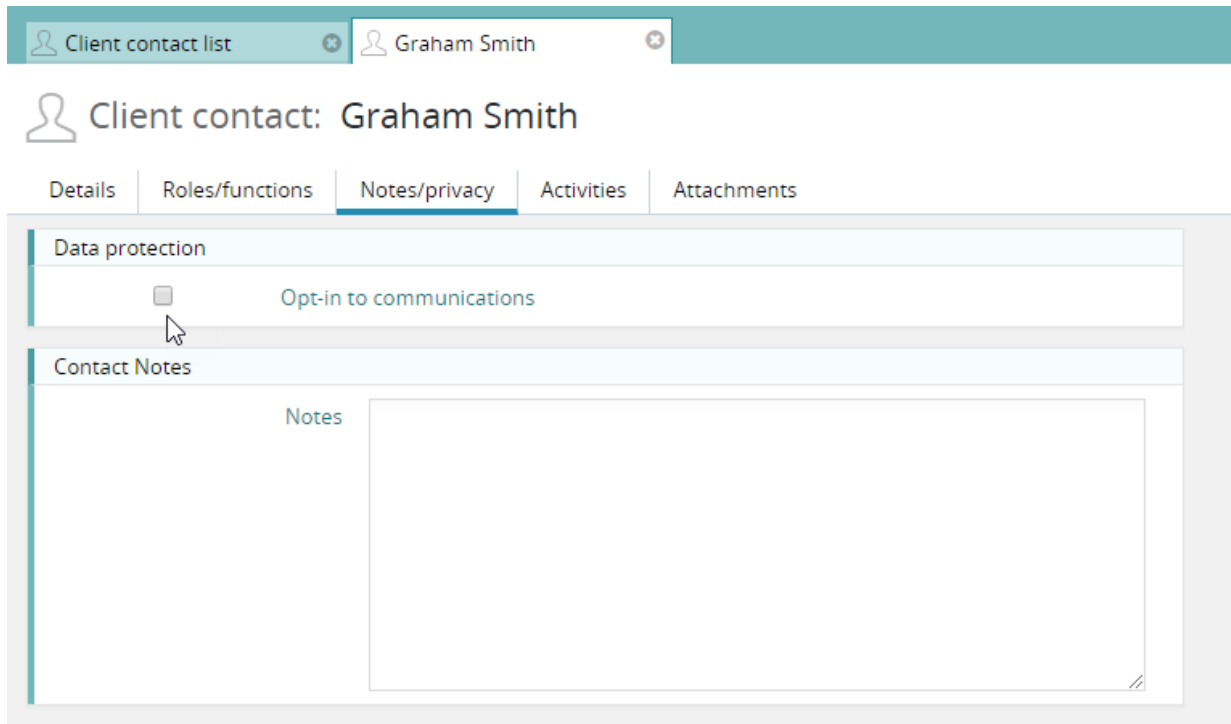
The 'Notes/privacy' tab on the client contact record is used to record the 'opt-in' status of the contact. On upgrading to Synergist version 12.2 all client contact records will be set as 'not opting in'. You will need to decide how you go about getting your contacts to agree to opting in to communications before you can get involved with direct marketing to these people.



The screenshot shows the 'Client contact list' header with a search bar containing 'Graham Smith'. Below the header, the contact name 'Graham Smith' is displayed. The 'Notes/privacy' tab is selected, showing a form with the following fields:

Title	- Blank -		
First name	Graham Smith	Middle initials	
Last name			
Job title	Head of Marketing & Business Development		
Salutation	Mr		
Assistant	James Kelly		

The Notes/privacy tab



The screenshot shows the 'Client contact list' header with a search bar containing 'Graham Smith'. Below the header, the contact name 'Graham Smith' is displayed. The 'Notes/privacy' tab is selected, showing the 'Data protection' section with the following fields:

<input type="checkbox"/>	Opt-in to communications
--------------------------	--------------------------

Below the 'Data protection' section is the 'Contact Notes' section, which contains a large text area for notes.

Opted-in status

Once the 'Opt-in' check box has been selected (indicating that this client contact has opted-in to communication), additional fields are now displayed.

- Verified
 - Indicates that you have verified the opt-in status
 - The system will also record the date it was verified and by who
- Source
 - Where the source of the verification was obtained
- Notes
 - Additional notes. Useful if verbal authority was obtained
- Additional preferences
 - Your contact may have opted-in generally but has specified that certain communication is not wanted (e.g. SMS). In this section you can define exactly what is agreed to and what is not. If you have already set these 'opt-out' fields in your existing data it will be retained. However, you will need to check the 'opt-in' box before it becomes visible.

Client contact list > Graham Smith

Client contact: Graham Smith

Details | Roles/functions | **Notes/privacy** | Activities | Attachments

Data protection

Opt-in to communications

Opt-in details

Verified

Source - Blank -

Notes - Blank -
Mailchimp
Verbal
Website Marketing Info Request

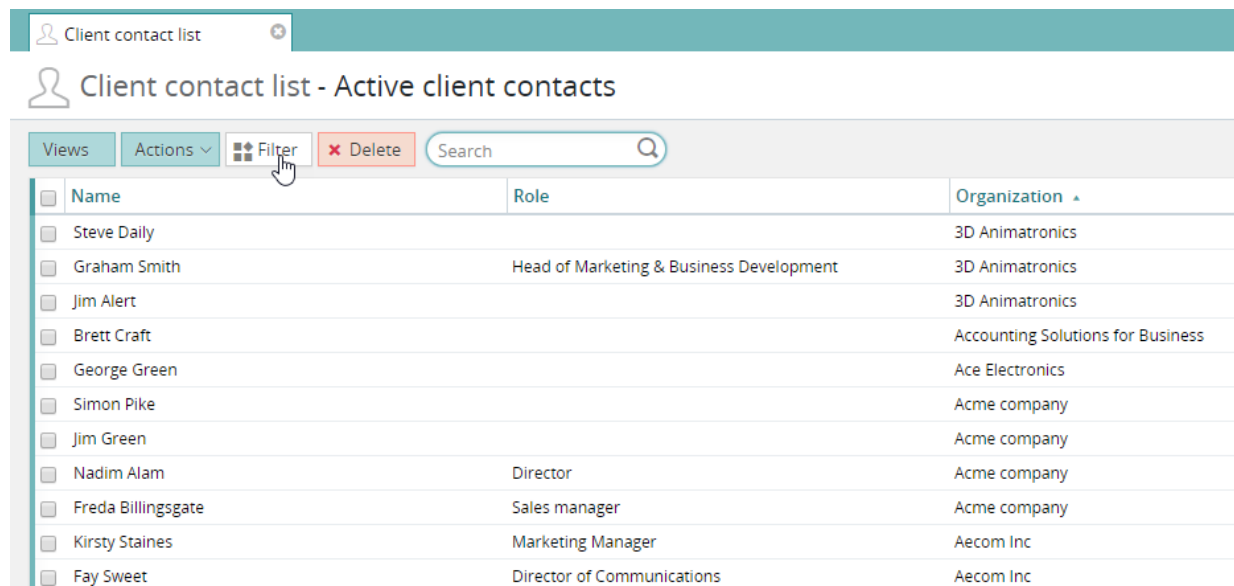
Additional preferences

- Opt out of email
- Opt out of mail
- Opt out of phone
- Opt out of mobile
- Opt out of SMS

Batch updating

Rather than editing each contact separately, you will probably wish to select a group of contacts and set their privacy settings using batch processing.

This is done from the 'Client contacts' main list.



The screenshot shows a web interface for managing client contacts. At the top, there is a teal header bar with a user icon and the text 'Client contact list'. Below this is a sub-header 'Client contact list - Active client contacts' with a user icon. The main content area has a toolbar with 'Views', 'Actions', 'Filter' (with a grid icon), 'Delete' (with a red 'x' icon), and a search box. Below the toolbar is a table with the following data:

<input type="checkbox"/>	Name	Role	Organization
<input type="checkbox"/>	Steve Daily		3D Animatronics
<input type="checkbox"/>	Graham Smith	Head of Marketing & Business Development	3D Animatronics
<input type="checkbox"/>	Jim Alert		3D Animatronics
<input type="checkbox"/>	Brett Craft		Accounting Solutions for Business
<input type="checkbox"/>	George Green		Ace Electronics
<input type="checkbox"/>	Simon Pike		Acme company
<input type="checkbox"/>	Jim Green		Acme company
<input type="checkbox"/>	Nadim Alam	Director	Acme company
<input type="checkbox"/>	Freda Billingsgate	Sales manager	Acme company
<input type="checkbox"/>	Kirsty Staines	Marketing Manager	Aecom Inc
<input type="checkbox"/>	Fay Sweet	Director of Communications	Aecom Inc

Using the filter

By using the filter, you can select a specific group of contacts. In this example, all contacts would be selected where 'opted-in' has been set but they have not been 'verified'.

Client contact list

List filter

Query

Search for

Filter by date

More filters Show inactive options

Client

Client contact

Contact functions

Status Both active and inactive

Data protection

Communication

Opted in Not opted in

Verified

Verified Unverified

Source

Mailchimp

If you would rather select the records you wish to process by simply pasting in a list of email address that you may have obtained from an external service – you can do this instead of applying filters. Just select the view 'Active contacts' and then paste in the email addresses for the contacts you are interested in processing.

SMS

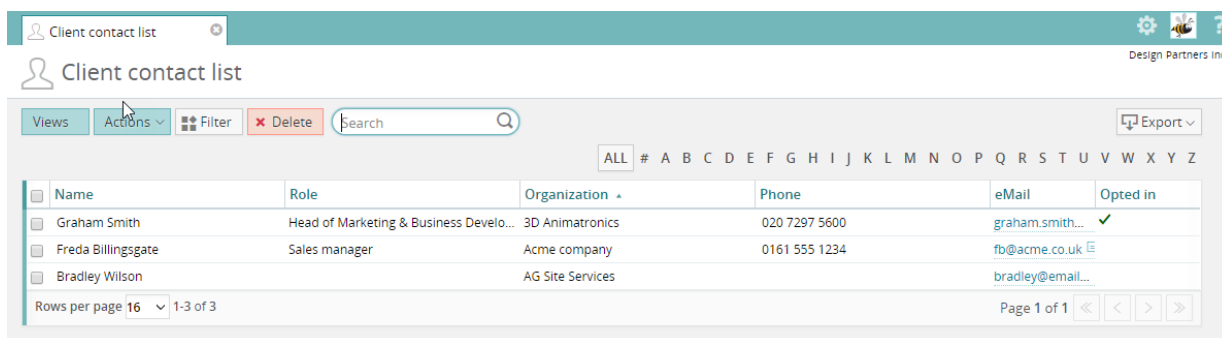
Opted out Not opted out

Filter using email addresses

Paste a list of email addresses here.

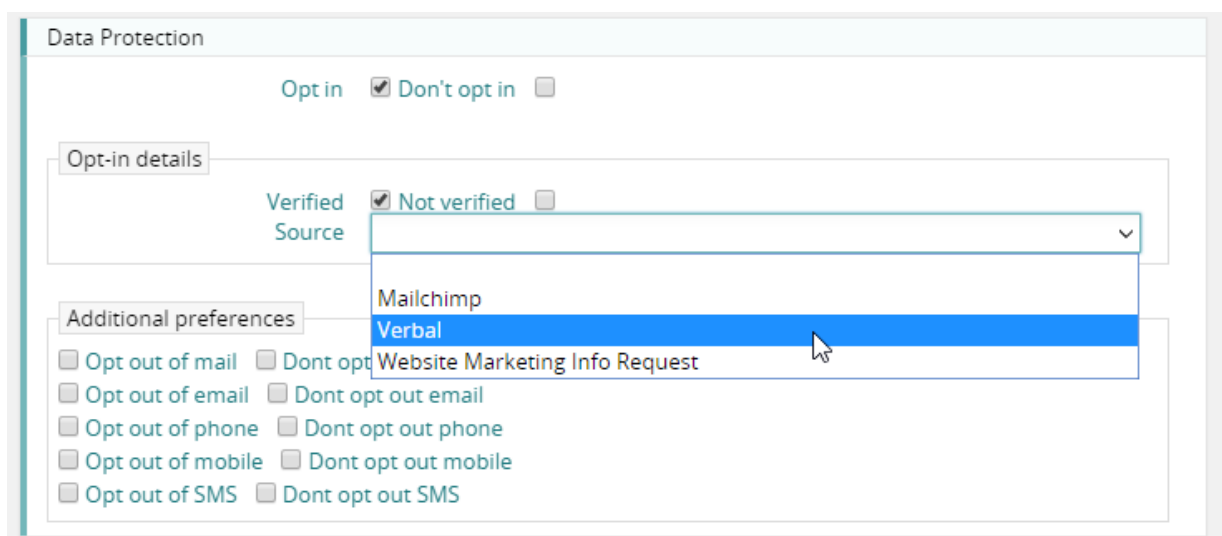
graham.smith@3DAnim.com
fb@acme.co.uk
bradley@email.com

On clicking 'Apply filter', the selection of contacts is now reduced to the contacts on the system that have the email addresses pasted into the filter.



Selecting the changes you wish to apply

To batch update the selected records click 'batch update' from the 'Actions' button. You can now select the changes you wish to apply to the selected records. In this example the selected records will be set to 'Opt-in' status and 'Verified'. The source will be set to 'Verbal'



Clearing down old data

Using the same batch update feature it is also possible to clear down data you feel you should no longer keep due to data protection issues. This can be done by marking the contact as 'inactive' and applying the 'cleardown' option.

Client contacts batch process for 255 records

Status

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

Cleardown personal data

Clear personal data (phone, email, social media). Note: Only inactive records will be affected by this.

Jobs & phases

Special stages

Two tier jobs

If you are creating a set of stages for each of your phases (two tier structure job) you can now designate certain stages to excluded estimates, timesheets & purchases.

Stage

Client Ace Electronics
Job/phase 16/au00023.001
Job description Website update
Phase description Website update
Stage Web site design
Description Web site design

Details Time Materials Estimate Activities

Comment

Milestone

Start date 01/03/2013 End date 17/03/2013

Duration (days) 11

Estimates/Costs include

Completed 13/03/2013

include
Include
Exclude

Reporting

Period profit report

Improved format

This report now displays both gross & net profit in the same report. However, there is still a gross profit only version available.

synergist Period profit 04/04/18 12:25:14 1

Number of jobs 3 From 01/04/18
To 30/04/18

Accounting Solutions for Business

Job No.	Client	Description	A/H	Recognised	Purchase cost	Gross profit	G. margin%	T&M costs	Net profit	Net margin%
16/A050011	Accounting Solutions for I	Website redesign	AC2	1,000.00	400.00	600.00	60	360	240	24
Client sub-total				1,000.00	400.00	600.00	60.00	360.00	240	24.00
Grand total				1,000.00	400.00	600.00	60.00	360.00	240	24.00

Data viewer tool

Opportunities

The data type 'Opportunities' now has two new options for 'value'.

- Estimated time
- Actual time

This will allow a user to see the number of hours rather than monetary values.

Activities

'Date to use' feature added to this data type.

Cost & quotes report

Export version

Variance added to the export version of the report

Est Time Charge	Actual Time Charge	Est Time Variance	Est Time %
1050	780.12	270	26
594	0	594	100

Billing plans summary report

New standard report. This report looks at a selection of jobs or phases and for each displays the quoted value and the billing plan. This report can be run as an exception report, where only quoted jobs that have no plan or an incomplete plan are displayed.

Only with billing plan/quote variance

synergist Billing plans summary report 23/03/18 13:56:27 1

From 31/12/17
To 31/07/18

Ace Electronics

Client	Job	Description	Handler	Quoted	Planned	Variance	%Planned
Ace Electronics	16/1600004	Graphics for New Hunter game	Jenna Quinn	6,020.00	3,309.10	2,710.90	55
Ace Electronics	16/au00023	Website update	Rob Shearer	0.00	0.00	0.00	0
Client sub-total				6,020.00	3,309.10	2,710.90	
				Total Quoted	Total Planned	Total Quoted	
Grand total				6,020.00	3,309.10	2,710.90	

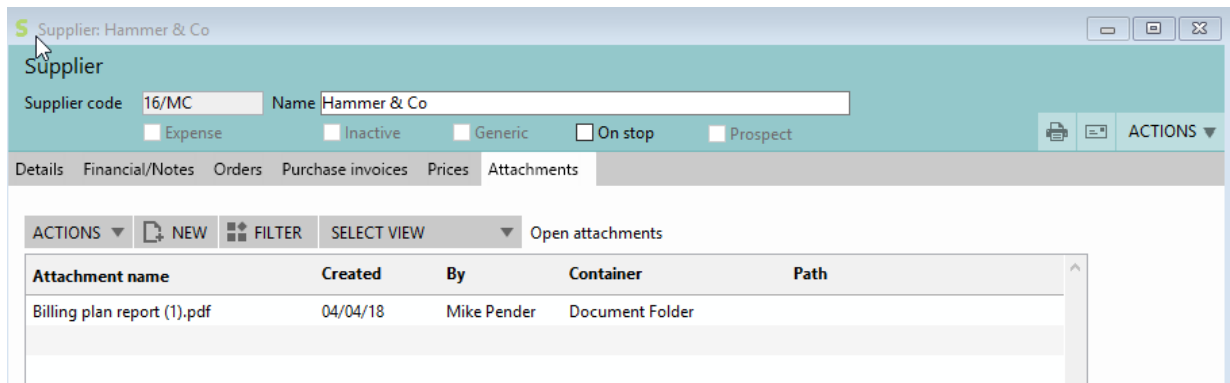
Suppliers & Purchasing

Attachments

Support for suppliers, purchase orders & purchase invoices

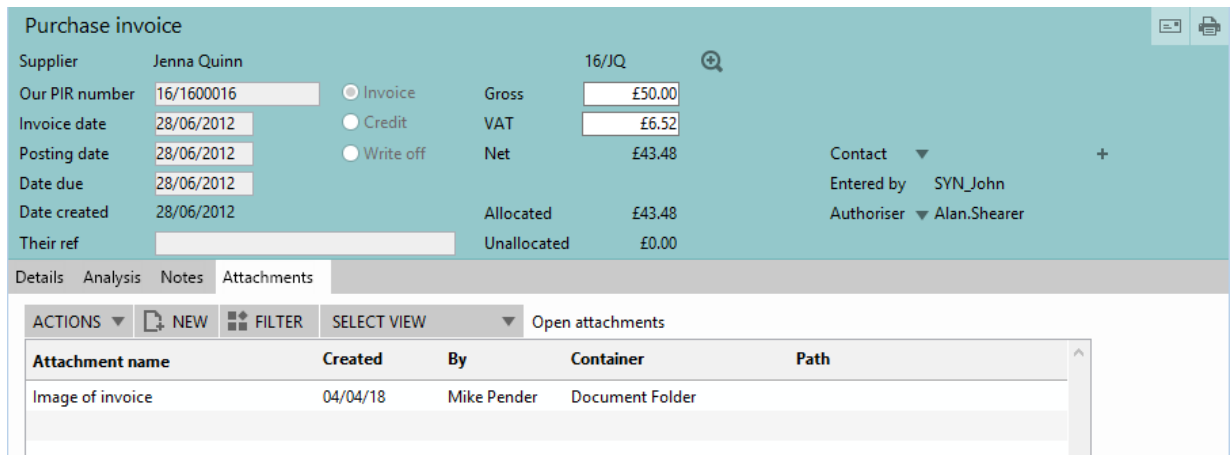
Previously it was only possible to attach documents to Client/client contacts/jobs/phases/activities. We have now extended that functionality to the purchasing side of Synergist.

Supplier attachments tab



Purchase invoice attachments tab

Similarly, you can add an attachment to a purchase invoice. For instance, you may wish to scan all your purchase invoices and attach these to the purchase invoice record. You can do the same for purchase orders.



New supplier company registration field

A new field for the supplier company registration number has been added to the supplier record.

The screenshot shows the 'Supplier' record for 'Hammer & Co'. The 'Supplier code' is '16/MC' and the 'Name' is 'Hammer & Co'. There are several status checkboxes: Expense, Inactive, Generic, On stop, and Prospect. The 'Company reg. number' field contains '55544345' and is highlighted with a mouse cursor. The 'Supply type' is 'Accounts Payable'. Below these fields is a table for 'Additional supply types' with columns 'Type' and 'Description'. The table is currently empty.

Supplier category field change

On the supplier card, the supplier category field is now a look-up field.

The screenshot shows the 'Supplier' record for 'Freedom Ltd'. The 'Supplier code' is '16/F1200' and the 'Name' is 'Freedom Ltd'. The 'Category' field is highlighted with a mouse cursor, showing a dropdown menu with the following options: '- Add new -', 'Bronze', 'Gold', and 'Silver'. The 'Silver' option is selected. Below the dropdown menu is a table with columns 'Name' and 'Telephone'. The table is currently empty.

The available categories displayed for the new field come from the options setup in the lookup and custom fields section of file maintenance. The supplier category field may also be filtered on in the criteria screen.