

## Version 12.96 - Release Notes

### Synergist Browser Interface

NOVEMBER 2023

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

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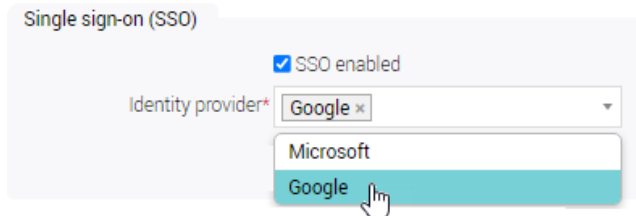
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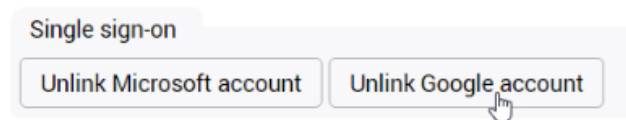
## File maintenance / company settings

### Google single sign on (SSO) (4493)

Located in System parameters, tick 'SSO enabled' to switch on the feature and then select Google and/or Microsoft as the identity provider.



Individual user records can be unlinked from their identity providers via the 'Single sign-on' panel located on the user record 'Details tab'.

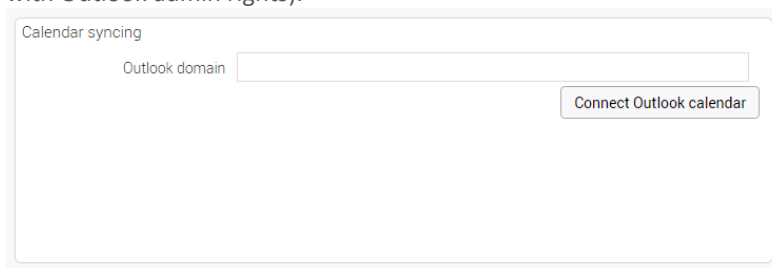


### Synergist Integration with Outlook Calendar (8704 & 8705)

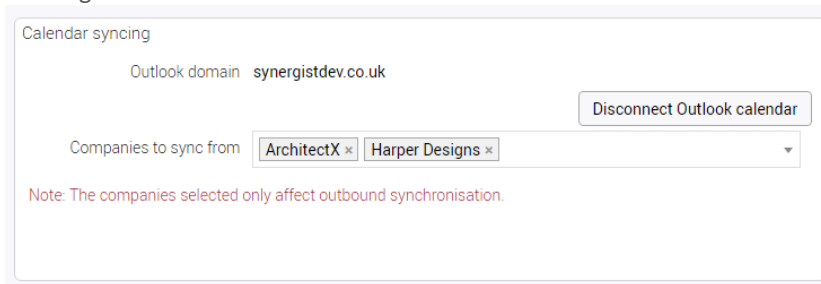
Bookings made in Outlook calendars (Microsoft 365) can now be viewed in Synergist Calendar Bookings. In addition, Synergist Calendar Bookings can also be viewed in Outlook calendars. Bookings should be edited in the calendar they were created in.

#### Setup

- A new panel has been added to the bottom of the System Parameters 'Settings' tab named "Calendar Syncing".
- An administrator enters the Outlook domain here to connect to their Outlook calendar, which prompts authentication to confirm the connection (this can only be done by a user of this domain with Outlook admin rights).



- When the connection is made, the user must then select the companies they wish to sync Synergist bookings from into their Outlook calendar.



Calendar syncing

Outlook domain synergistdev.co.uk

Disconnect Outlook calendar

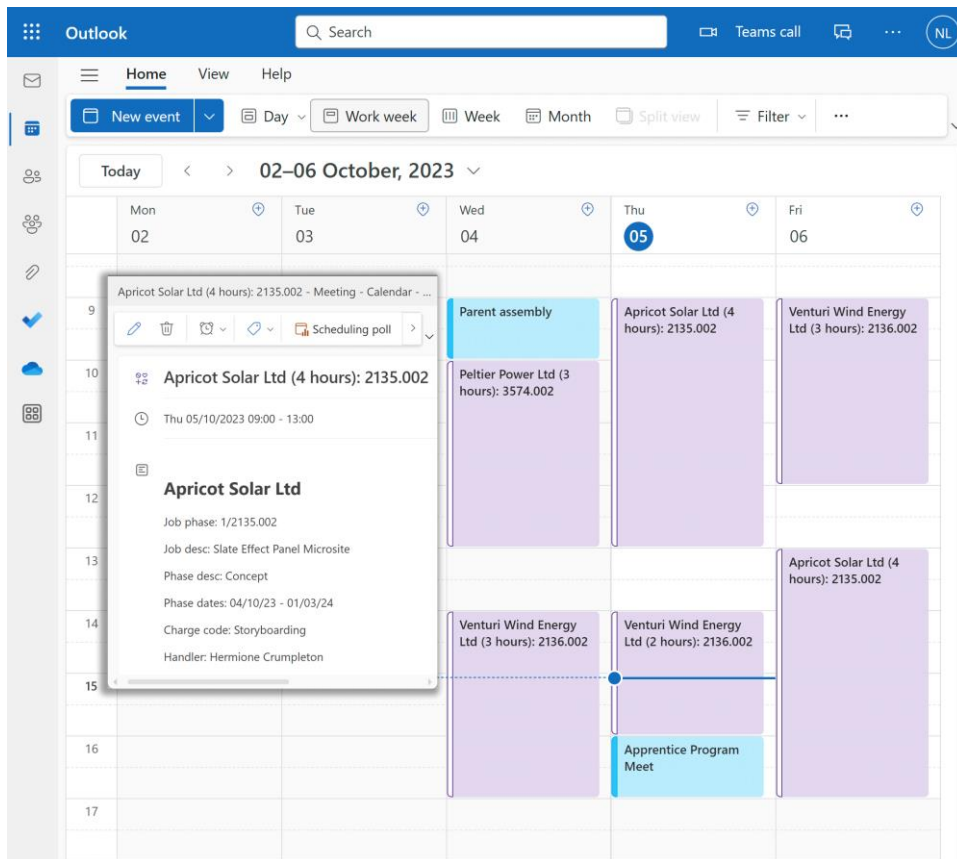
Companies to sync from ArchitectX × Harper Designs ×

Note: The companies selected only affect outbound synchronisation.

- An administrator can disconnect a Synergist system from the Outlook calendar. When this is done, Synergist- Outlook Calendar synchronisation will end.
- When the setting is first switched on and existing bookings are being synced from one calendar to another, any bookings that are made for dates prior to the current date will not be synced.

## How it works

- Incoming bookings, being synced from their Outlook calendar into Synergist, will automatically be placed in the first company of the corresponding staff resource.
- Once setup, any bookings already in the Synergist calendar with the selected companies will automatically sync with the users Outlook calendar.
- When any new booking is created on the users Outlook calendar, this will appear on the Synergist Calendar bookings for the user, including repeating events.
- Calendar events appearing in Synergist Calendar Bookings that originated from Outlook are not editable, movable or delete-able from Synergist Calendar Bookings.
- Calendar bookings appearing in Outlook that originated from Synergist Calendar Bookings can be edited and deleted from Outlook (this is because Synergist cannot prevent an Outlook user from doing this), however these changes will be reversed at the next Synergist to Outlook synchronisation point.
- When bookings made in Outlook are edited in Outlook, the change will be reflected on the Synergist calendar bookings page.
- If a booking made in Outlook is deleted from Outlook, the booking will be removed from Synergist Calendar bookings page as well.
- When bookings made in Synergist are edited in Synergist, the change will be reflected in the Outlook Calendar.
- If a booking made in Synergist is deleted in Synergist, the booking will be removed from the Outlook Calendar.



### Data validation added for user creatable code fields (6666)

New validation method for all creatable code fields. When using special characters, the characters will not appear, and an alert will appear to inform of an invalid character.

### Show/hide user avatars (6878)

The new 'Show user avatars' field controls the display of avatars across Synergist. Located in Utilities > System parameters > Settings tab, the field has three options:

1. Yes - avatars are displayed for all users.
2. No - avatars are not displayed for any users.
3. Optional - avatars are displayed dependent on user preferences.

Avatars are only displayed if users have uploaded a profile picture, initials are displayed if avatars are not to be shown and the avatar in the top right corner of the screen is not affected, it is always visible unless there is no profile picture.

### User groups filter option to show All, Active, and Inactive (7098)

A new list filter containing three options, has been added to the User groups - Users list:

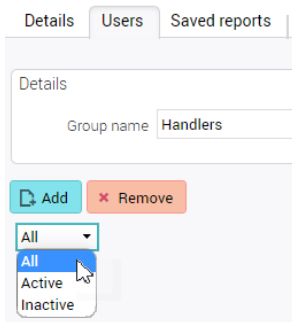
- All - select to view enabled and disabled user accounts.
- Active - select to view enabled user accounts.
- Inactive - select to view disabled user accounts.

Examples:



When a user account is disabled, the account is classed as inactive and appears in the list when 'All' or 'Inactive' options are selected. When a user account is enabled, the account is classed as active and appears in the list when 'All' or 'Active' are selected.

#### User groups



### System message displays when attempting to log in to an inactive account (8132)

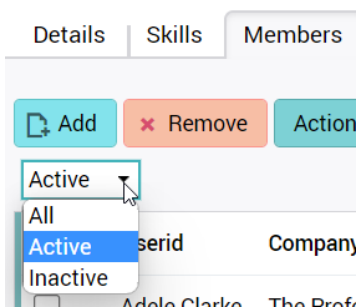
Administrators can log into user accounts via FM > Users > Actions > 'Login as user'. Previously, if an administrator attempted to login as an inactive user, they were redirected to the Synergist login screen. Now if an administrator attempts to login as an 'Inactive user', a system message is displayed saying "User account is disabled", and the administrator is not redirected anywhere.

### Active/inactive filter dropdown added in file maintenance (8158)

An active/inactive filter dropdown has been added to following areas.

- User group > Users
- Team > Members

#### Team



### Tooltips added to File Maintenance data when partly truncated (8414)

When a column's data is partially truncated and the column data shows an ellipsis, a tooltip will now show when hovering over the data to reveal the full text.

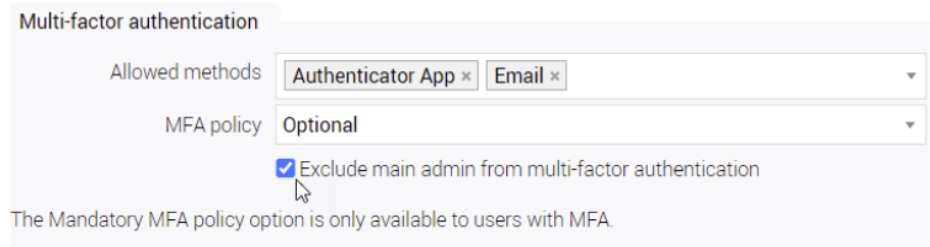
### Changes to Company Setting Timesheet Options (8565)

There have been three changes to the timesheet options in company settings.

- 'Web timesheets - special options' panel has been removed.
- 'Post on submit' tick box has been moved to the 'Options' panel.
- 'Swap Pending/Weekly display sections' option has been removed as its function is now redundant.

## System parameter added to exclude main admin from multi-factor authentication (8673)

Ticked by default, the new 'Exclude main admin from multi-factor authentication' checkbox is in 'System parameters'. When the checkbox is ticked, the main administrator is excluded from multi-factor authentication. When the checkbox is unticked, the main administrator is included in multi-factor authentication.



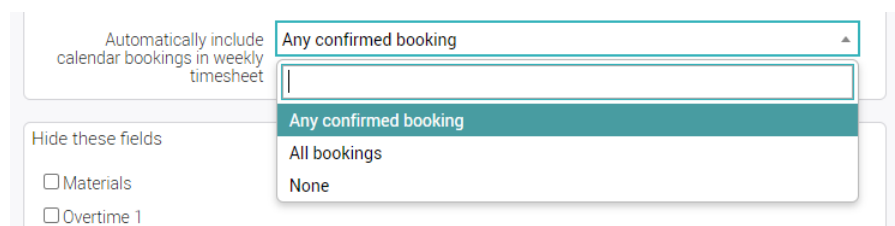
## System Parameter 'Targets active' filter only visible when 'Use handler targets' is not ticked (8885)

The 'Use handler target' tick box, when unticked, allows the 'Targets active' filter in the Clients area to be present. If the option is ticked, the 'Targets active' filter is no longer present.

## New company setting for calendared items to show in weekly timesheets (3012)

A new company setting is now available to control if and how job phases that have been booked into user calendars will appear in users weekly timesheet. There are 3 options:

- Any confirmed booking - this is the default setting and will include job phases in weekly timesheets where there is a confirmed booking in the week being displayed.
- All bookings - this setting will include job phases in weekly timesheets where there is any booking (draft or confirmed) in the week being displayed.
- None - this setting will not include job phases in weekly timesheets based on calendar bookings being present.




## Suppliers and purchases


### PO currency is updated to the Suppliers default currency (4530)

Changing the supplier on a purchase order, automatically updates the purchase order's currency to the supplier's default currency.

### Purchase invoice displaying date/time and authoriser when authorised (5199)

When 'Authorised' is ticked, the date and time are displayed next to the authoriser's name.

 Purchase invoice: **01579**

Supplier **AA Mattrose** 

Their ref

Invoice | Credit | Write off

Details | Analysis | Notes | Attachments

---



Value


Gross	4200.00
VAT	700.00
Net	£3500.00
Allocated	£3500.00
Unallocated	£0.00

---

People

Entered by **Syn\_Andy**

Contact **- Blank -**  

Authoriser **- Blank -** 

Authorised  **Andy 2023-04-18 8:49am**

### Tooltips added to Supplier Purchases & Expenses table (8451)

Tooltips have been added in the Description, Phase and Client name columns on the Purchase and Expenses table in a selected Supplier. The tooltip for Phase has a link to take you to the phase record and the tooltip for Client name contains a link to go to the Client record.

### Purchase order delivery address from user's team (8469)

The Purchase order delivery address populates with the one from the user's associated team. If there is no associated team address, it will default to the users company address as usual.

## Clients and jobs

---

### 'Exchange rate' dropdown added in the batch draft invoice screen (5484)

A new dropdown has been added in the batch draft screen labelled 'Exchange rate'. This dropdown includes two options 'Job exchange rate' and 'FM exchange rate', with 'Job exchange rate' selected as default as this is how the calculation was previously working. When 'FM exchange rate' is selected jobs that have the same currency, but different exchange rates can now appear on the same invoice.

### 'Total' row added in the 'Purch & exp' tab within a selected job (5943)

The 'Total' row will appear when there are multiple purchase and expenses pages. It will calculate the totals for the page shown with the 'Grand total' below it still showing the total of all the pages combined.

	Phase	Order	Supplier	Real date	Description	Type	Estimate	Cost	%	Total	Their Ref	I	Invoice No	PI Ref
<input type="checkbox"/>	017	011720	Able Printers ...	04-28-14		Engineering W...	0.00	300.00	0	300.00			D14077	4545425
<input type="checkbox"/>	025	011721	Able Printers ...	04-28-14		i love memes	0.00	600.00	1	606.00			D14077	
<input type="checkbox"/>	012	011718	Able Printers ...	04-14-14		Printers	0.00	0.00	35	0.00			D14077	
<input type="checkbox"/>	011	011719	Able Printers ...	04-14-14		Printers	0.00	0.00	35	0.00			D14077	
<input type="checkbox"/>	014	011717	Able Printers ...	02-27-14		Printers	0.00	0.00	35	0.00			D14077	
<input type="checkbox"/>	013	011710	Able Printers ...	02-21-14		Electrical Work	33.00	44.00	0	44.00			D14077	
<input type="checkbox"/>	012	011709	Able Printers ...	02-06-14	Arrgh	Engineering S...	0.00	0.00	1	0.00			D14077	
<input type="checkbox"/>	009	011703	Able Printers ...	12-03-13	Subcontract D...	kevin test add 2	4.00	3.00	1	3.03	5453		D14077	re
<input type="checkbox"/>	012	011702	Able Printers ...	12-02-13	Subcontract ...	Freelancers	2.00	46.00	2.5	47.15			D14077	
<input type="checkbox"/>	013	011695	Able Printers ...	11-07-13		Engineering S...	0.00	0.00	1	0.00			D14077	
							Total	39.00	993.00					
							Grand total	444.00	2214.87					

Rows per page 10 | Items 1-10 of 52 | Page 1 of 6

## Allow Custom job/phase layouts to be printed from lists (6652)

Custom job/phase layouts can now be printed from the job and phase list. These can also be printed from the job or phase directly.

### Job list - Open jobs and quotes

The screenshot shows a software interface for a job list. At the top, there are tabs for 'List', 'Billing plan', and 'Gantt'. Below the tabs are several buttons: 'Views', 'Options', 'Actions', and 'New'. Underneath these are 'Print' and 'Export' buttons. A mouse cursor is shown clicking on the 'Print' button. Below the buttons is a table with columns for 'Job' and 'Client'. One row is visible with a job ID of 959 and the client name 'Powered Up Couple'.

## Due date colours in job/phase main lists (7137)

Now in due dates when the due date is today the text will be green and when it is due this week the text will be blue. Below is an example of these two changes with the current colours due dates have.

<input type="checkbox"/>	1019	God Of ...	Matt Wadd	01/02/2023	10/02/2023
<input type="checkbox"/>	1020	God Of ...	Matt Wadd	22/02/2023	22/02/2023
<input type="checkbox"/>	1021	God Of ...	Matt Wadd	22/02/2023	25/02/2023
<input type="checkbox"/>	1022	God Of ...	Matt Wadd	22/02/2023	26/04/2023

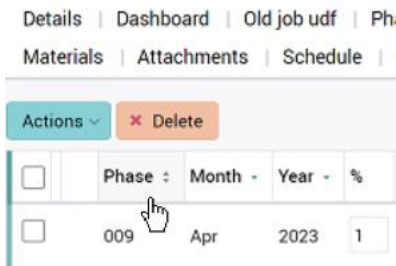
## Phase details tooltip in the phase column on job records and billing plans (7240)

A tooltip has been added to the phase column within the job record and the billing plan. The tooltip shows the phase details including number, handler, job description and phase description.

<input type="checkbox"/>	Phase	Month	Year	%	Planned
<input type="checkbox"/>	001	Mar	2028	0.0%	60.00
<input type="checkbox"/>	002	Mar	2028	0.0%	200.00
<input type="checkbox"/>	<a href="#">1/00011199.002</a> Handler: Naruto Uzumaki Job desc: Wild Hearts Phase desc: Sapscourse				
<input type="checkbox"/>					
<input type="checkbox"/>					

### Ability to sort by phase number, month, and year in the billing plan table (7288)

The billing plan table in the job and phase records can now be sorted ascending/descending by phase number, month, and year.



### Hiding 'Quick add' feature at job level (7305)

A new field has been added to Company Settings in the Billing Plans tab 'Hide quick billing plan on job header'. When ticked or the drop down 'Billing plan levels allowed' is set to anything other than Phase only. The 'Quick Add' button and the Quick Billing Plan option in Actions will not be visible on the Billing Plan page of any job.

Billing plans

Enable billing plans

Billing plan levels allowed

Hide quick billing plan on job header

### 'Revenue recognition' entry added to 'Quick billing plans' (7289)

'Recognise' and 'Recognise value' columns have been added into the quick billing plans table. 'Recognise value' is ticked and 'Recognise' is set to 0.00 by default, if the related company setting is switched on. When 'Recognise Value' is unticked, the 'Recognise' column will show the planned value. Both columns are hidden from view if on the company settings code page 'Revenue recognition' checkbox is unticked.

Total quoted for selected phases: £0.00

Date	% of quoted val...	Value(£)	Recog value	Recognise(£)	Offset
05-01-23	0	0.00	<input checked="" type="checkbox"/>	0.00	0
<b>Total per phase</b>		<b>£0.00</b>			

## Template dropdown description defaults to job number if the title is left blank (8462)

When creating a new job, the 'Template' dropdown will show the job number when the template was created without a title.

## Remaining to recognise total added to billing plans screen (6822)

For companies that have enabled revenue recognition there is now a new 'Remaining to recognise' total above the table on the Billing plans tab of Jobs and Phases.

## Quote column values displayed to two decimal places (8057)

Values in the 'Quoted' column and the 'Grand total' at the bottom of the Quoted column are displayed to two decimal places. This occurs on the following lists:

- Jobs list
- Phases list
- Opportunities list

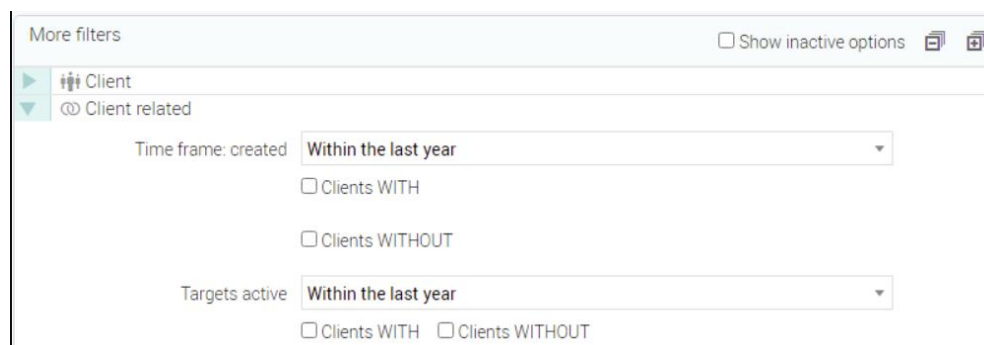
When exporting the current view in these lists, the values in the exported 'Quoted' column are also displayed to two decimal places.

## 'Recognise Value' checkbox added to billing plans table (8212)

'Recognise value' column has been added into the billing plans table for both Jobs and Phases. 'Recognise value' is ticked by default, if the related company setting is switched on. When 'Recognise Value' is unticked, the 'Recognise' column will show the planned value.

## Client targeting added to Client related filtering (6498)

New filter option named 'Targets active' added in the 'Client Related' filter section. This will filter on clients who have had or have not had a target active within a specified time frame period. Located just below 'Time frame: created' option.

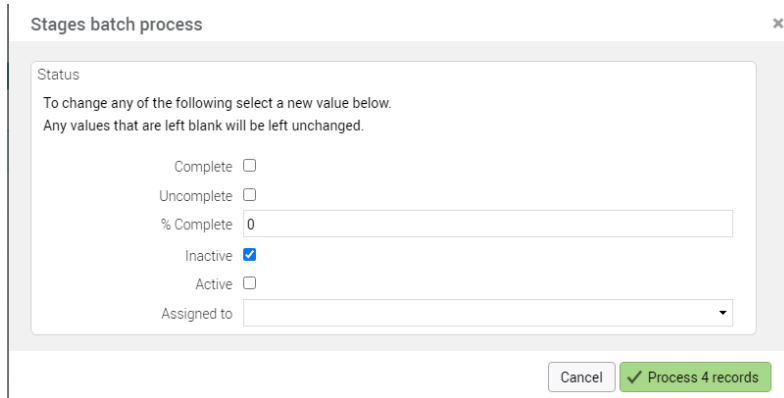


## The 'Paid' status from Xero shown in the invoice list (7556)

The invoice list now has an option for a 'paid' status column that displays if an invoice has been marked as paid in the Xero accounts package. This is done by choosing this column in the column picker.

## Set stages as inactive in a batch (9181)

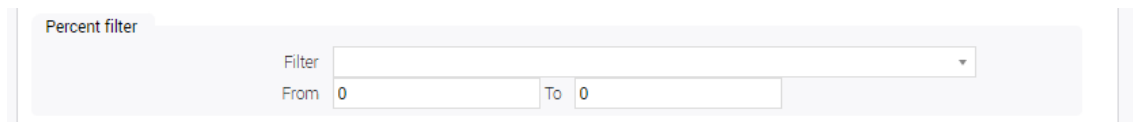
Using the 'Actions' button and selecting 'Batch update' multiple stages can be set as inactive from the stage list. In the modal the 'Inactive' box can be ticked and the 'Process' button will say how many records will be included.



### 'Percent filter' panel added to 'Job & phase' filter (8822)

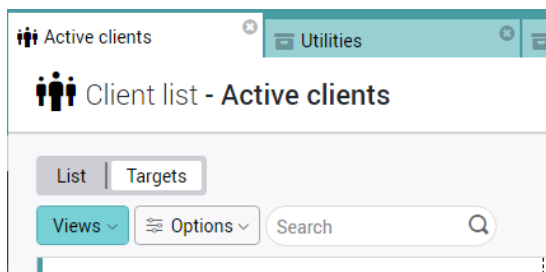
The 'Percent filter' panel enables the filtering of job and phase lists by percentage values on thermometers. The panel consists of 3 fields:

1. Filter - These are the available thermometers to filter against. Only one may be selected at a time.
2. From
3. To



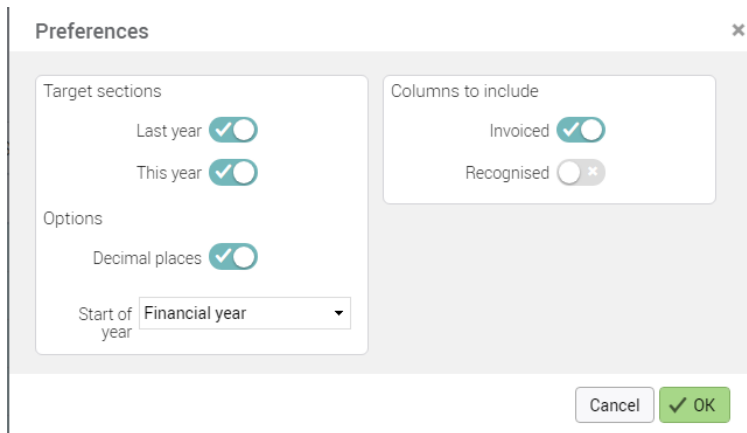
### Client targets switch and financial data on Clients List (8383)

A new switch has been added that will let you switch to either see the clients list or the client targets, if the System parameters have 'Use handler targets' unticked.



In the preferences users can select the start of year to affect the information in the financial data for client targets in the clients list. If a financial year has not been set in company settings, the start of year will be set as 'Calendar year' and no dropdown menu is accessible. If a financial year has been set, the start year will default to the indicated financial year. The dropdown menu selector will show and allow the change between 'Financial year' or 'Calendar year'.

Mutually exclusive 'Invoiced' and 'Recognised' buttons have been added. Selecting one or the other will affect the 'remaining' and '% achieved' (defaults to invoiced). Recognised will only show if Revenue recognition is switched on.



## 'Invoice allocations and billing plan recognised in currency' checkbox (6753 & 7445)

'Invoice allocations & BP recognised in currency' checkbox has been added to Company settings > 'Switches' tab.

- On upgrades, 'Invoice allocations & BP recognised in currency' is unticked.
- For new companies, 'Invoice allocations & BP recognised in currency' is ticked.

When 'Invoice allocations & BP recognised in currency' is ticked/switched on:

- Invoices, Revenue Recognitions and Write-offs are raised only in the job currency, although a different exchange rate is permitted.
- Phase allocations on invoices, Rev Recognitions and Write-offs are displayed in the job currency.
- If a job contains pre-existing invoices (draft or real) and then the feature is switched on, new invoices on the same job only display phase allocations in base currency as before.

Billing plans recognised in currency is only available when 'Revenue recognition' is enabled in Company settings. When 'Invoice allocations & BP recognised in currency' is ticked/switched on:

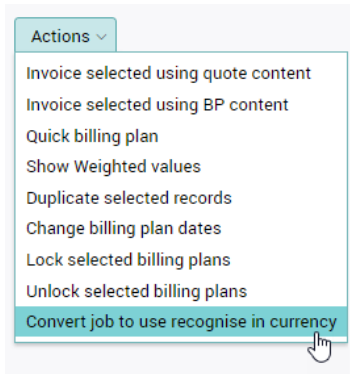
- For jobs created after the checkbox is ticked/switched on, the 'Recognise' value is displayed and enterable in both foreign currency and base currency

%	Planned value	Notional costs	Profit forecast
50.00	125.00	0.00	125.00
Currency	150.00		
<input type="checkbox"/> Weighted?			
<input checked="" type="checkbox"/> Recognise value	125.00		
Currency	150.00		

Manual planned value  
 Synchronise planned value with quote  
 Bacs 1st payment

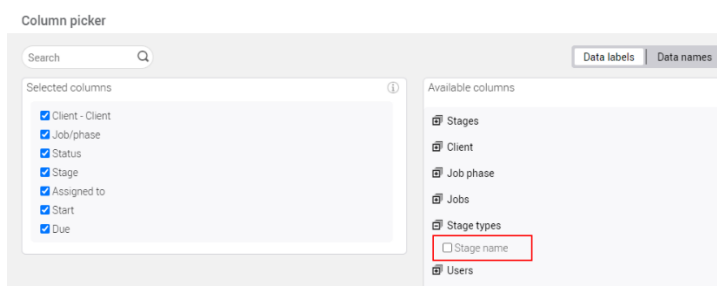
- For jobs created before the checkbox is ticked/switched, the 'Recognise' value is displayed in base currency, as before. The option 'Convert job to use recognise in currency' is available on the Billing plan Actions button when all the following conditions are met:
  - The job was created before 'Invoice allocations & BP recognised in currency' was ticked.
  - 'Invoice allocations & BP recognised in currency' is currently ticked.
  - The job is in currency.





### Stage name added to the column picker on the stages list (9695)

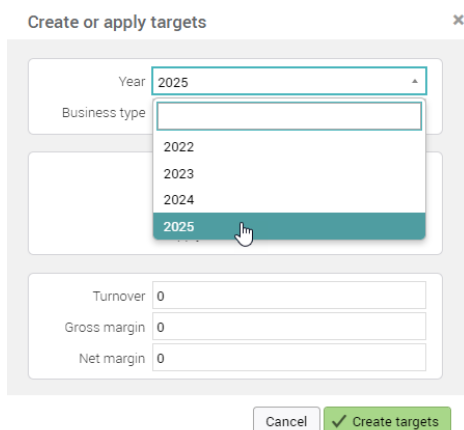
A new column is available in the column picker for the Stages table to show the stage type name.



### Additional year added to the 'Year' field when creating or applying client or handler targets (9232)

In the scenario of the current year being 2023:

- 2022 - last year
- 2023 - current year
- 2024 - next year
- 2025 - the additional year






### Ability to sort by 'Project' on the main job and phase lists (9034)

On the main job and phase lists, clicking on the 'Project' column header sorts the list.

Note: The 'Project' column needs to be selected via the column picker.

 Job list

List   Billing plan   Gantt			
Views ▾   Options ▾   Actions ▾   New ▾   Delete   Search <input type="text"/>			
<input type="checkbox"/>	Project	Job	Client
<input type="checkbox"/>	Abbercrombie		'MILLIONS'
<input type="checkbox"/>	ABC Ltd 2024		Cafedirect3
<input type="checkbox"/>	Air 2000		Mercurials

### Ability to copy a stage within a job (8418)

A 'Copy' button has been added on the schedule tab of a phase. This button will allow an existing stage to be copied including all the associated time, material and purchase estimates, if the job is a 2-tier one. This can be seen below.

Print ▾			
	Duration	Assigned	
<input type="checkbox"/>	1		Insert Copy
<input type="checkbox"/>	1		Insert Copy
<input type="checkbox"/>	1		Insert Copy
<input type="checkbox"/>	1		Insert Copy

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## Reports

### Permissions setting to restrict access to the 'Filter' button in saved/customer reports (6689)

A new option has been added in permissions labelled 'Enable filter in saved/custom reports'. This can be adjusted at user and group level. When ticked the filter button will appear.

## Reports

- Reports module
- Standard reports
- Custom/Quick reports
- Data viewer
- Schedule reports
- Enable filter in saved/custom reports

### Currency added to standard exports (8001)

The currency column is now added to all standard report exports and shows the currency associated with the value.

### Cost transfer improvements for handling jobs with many items (6546)

Cost transfer in the Time, Materials and Purchases tabs now show the first 500 items. An alert will show if the user has more than 500 saying not all items are visible. This will add more dependency on using the filters to make it easier to find specific items.

### 'Their ref' column added to the purchase invoices detail report (8261)

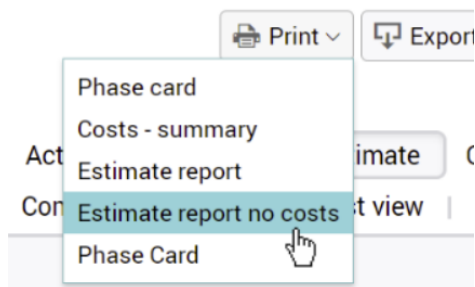
A new column has been added to the purchase invoices details report labelled 'Their ref'.

### Accrued column added to Profit by invoice report (6325)

When the 'Enable revenue accrue/defer' facility is ticked in the Company settings area, the Profit by invoice report will contain both the 'Deferred' and 'Accrued' columns in the exported report.

### Estimate without costs PDF Added (7999)

'Estimate report no costs' has been added to the available web print options on the Jobs and Phases estimate tabs.



### New items added in 'Date selection' filter for the 'Purchase invoices' report (7574)

'PI due date' and 'PI created date' have been added into the 'Using' dropdown within 'Dates' for the 'Purchases invoices' report.

Date selection

Filter by date

Dates

Using **PI due date**

From

Range

- PI posting date
- PI due date**
- PI document date
- PI created date

### 'Contact' and 'Notes' columns added to the Managed client SO's by order number report (8261)

Two new columns have been added to the 'Managed client SO's by order number' labelled 'Contact' and 'Notes'.

### 'Staff resource and client' sort option added to 'Timesheets by day' report (8944)

A new sort option has been added in the drop down called 'Staff resource and client' on the 'Timesheets by day' report. This will sort the report by staff resource and then by client. The column labelled 'Resource' has been renamed to 'Staff resource' for consistency.

### Scheduler - report generation, allow a text description for email

A new text field to be provided when creating a scheduled report. This is in both Saved Reports - Schedule report and in Utilities - Scheduler.

Saved and custom reports

Schedule report

Description Chase up Job Phase List

Email body text Here is some explanatory text that will help to explain what the report is and any actions required from it

Frequency

Report

If the user enters some text into this new field, it will be used as the body text when emailing a report out. Currently the description field is used as the email subject. For Data Viewer reports that are sent as an HTML email, the body text entered will appear as part of the content.

Scheduler

Details Settings

Settings

Alert/process Report Generation

Description Chase up Job Phase List

Email body text Here is some explanatory text that will help to explain what the report is and any actions required from it

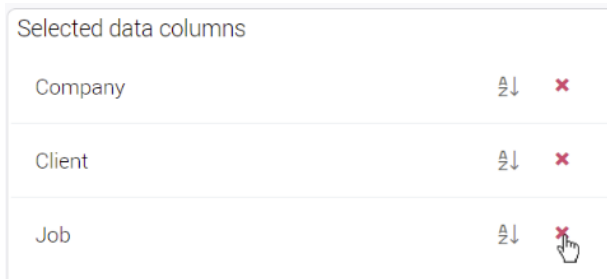
Frequency

Frequency Daily

## Data viewer

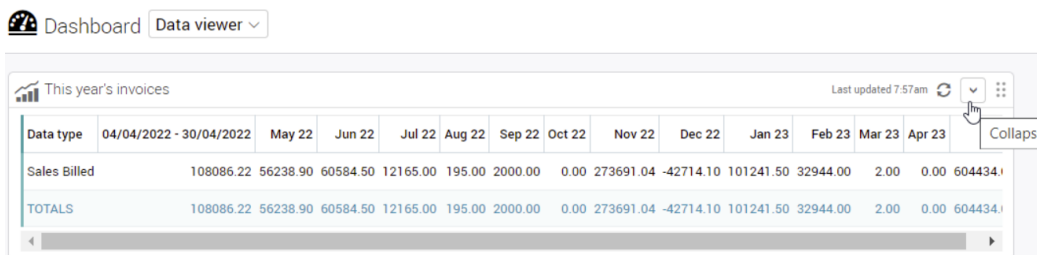
### Look of field selection in data viewer updated (6792)

The radio buttons and the delete button below them has now been removed. The functionality has now been replaced with a remove button to the right of each field. An example of this is shown below.



### Expand/collapse option on dashboard data viewer panels (6906)

A collapse/expand option has been added to each Data view in the Dashboard Data viewer.



### Close button added to the panels in the 'Data viewer dashboard' (7174)

On the Data Viewer page of the dashboard each panel now has an 'X' close button to remove the panel from the dashboard. When hovering over the 'X' a tooltip will appear stating 'Remove from dashboard'. When the 'X' is clicked different alerts will pop up depending on the scenario. When 'Yes' is selected from these prompts then the panel will be removed.

### Remove columns with blank or no data (6767)

New check box to remove any column with no data values in tables and charts on data viewer.

### Data viewer option to output 'Booked holidays' (8403)

In the 'Option' drop down a new selection labelled 'Holiday' has been added when 'Time booked' has been selected in the 'Data-type' dropdown. This allows the data viewer to now show time booked as a holiday.

### Four-digit year date format added in data viewer (8961)

To avoid issues with conversion into Excel when exporting, an option has been added for years to be in a four-digit format.

### Hyperlinks added to go to client, jobs, and phase records (7208)

In the data viewer table hyperlinks have been added which take you to the record in a new tab. This is for client, job, and job phase.

## Field names appended on Job Header and Job Phase (9335)

Some field names are shared by both the Job Header and Job Phase.  
When this occurs:

- on the Job Header, the field name is appended with [Job]
- on the Job Phase, the field name is appended with [Phase]

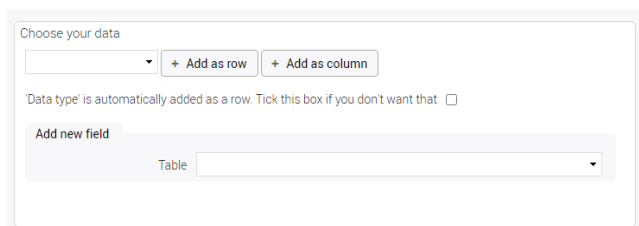
As part of this change on the Job Phase, 'Phase Descripti' has been amended to 'Phase Description'.

## Updates to the sort for the 'Names' columns when 'Show names' is active (7026)

Previously the sort order for data in the data viewer was by code, whereas the description/name was shown. This was confusing as the displayed data could appear in a random order. The changes done to allow multiple column cross-tabbing has changed this. Now the sort order will appear in alphabetical order, apart from using fields as columns. In this instance the additional option appears to allow a choice between showing descriptions or codes.

## Allowing multiple cross-tab fields (9042)

The 'Set as cross-tab' button has been removed and replaced with a new panel that allows for a list of fields that can be selected as columns and rows for any Data viewer tables.



New options have been added to the field list, these are 'Date' and 'Data type'. 'Data type' is automatically set as a row, though this can be turned off via a tick box or by setting 'Data type' as a column. 'Date' is automatically used as a column on the condition it hasn't been set as a row by the user. The restriction to 60 period columns has also been removed, so there is now no column limit.

## Change dates on all data types without saving to filters (8836)

Previously in data viewer when 'Apply' was selected it would apply both dates and filters to all other entries. The apply button has been changed to a drop down, where the previous behaviour can still be chosen along with 'apply selected entry's dates to all' which only applies the dates but does not apply changes to the filters.

## Data storage for Data viewer and Saved reports pages (9190)

Data viewer and Saved reports tables and charts no longer disappear if the user navigates to another Synergist tab and subsequently returns to Data viewer or Saved reports. This is due to the data being stored for that web session.

## New filters added (3103)

- Supplier - This whole category has been added and contains the following filters:
  - Supplier
  - Expense user
  - Supplier contact
  - Status
  - On stop
  - Supply type
  - Use additional supply types.

- Supplier category
- Country
- Type
- Supplier type
- Include
- Purchase - This is a pre-existing category and includes the following filters:
  - Purchase type
  - Real/estimate
  - Direct/exp approval
  - Consolidated PO's
  - Invoiced status
  - Cancellation (Pre-existing filter)
  - Purchase type
  - Ordered by
- Invoice & Purchase --- This is a pre-existing category with one new filter added:
  - Purchase currency
- Purchase invoice --- This whole category has been added and contains the following filters:
  - Fully allocated.
  - Part allocated.
  - Un-allocated
  - Zero value
  - Posted
  - Approval
  - Authoriser
  - Type

### Calculate function added (3435)

A new Calculate button 'Add Calc' has been added under the data entry table. This will add a new data entry to the data type named 'Calculation'.

#### Data viewer

	Data type	Options/Calculation
<input type="radio"/>	A Time actual	Value=Units, Option=Real
<input type="radio"/>	B Target turnover	Value=Turnover
<input type="radio"/>	C PO actual	Value=Cost, Option=Actual
<input type="radio"/>	D Sales plan	Value=Planned value
<input checked="" type="radio"/>	E Calculation	(A-C)+D

+ Add entry   + Add calc   Edit   Filter   Delete   Apply

The Calculation itself can be entered under the "Options/Calculation" column. There is also a tooltip on that field to assist users with examples of what can be entered in the textbox. It is possible to use the column total for a data type in a calculation by prefixing the letter in the calculation with a '#'. One example usage of this is to calculate using the value of each row as a percentage of the total. eg: D/#D\*100

<input type="radio"/>	D Sales plan	Value=Planned value
<input checked="" type="radio"/>	E Calculation	<input type="text"/>

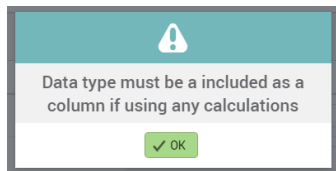
+ Add entry   + Add calc   Edit   Filter   Delete   Apply

Enter calculation eg: (A-B)+C

Each row of the Data entries is labelled alphabetically. These labels move with the data entry. If a row is moved from the 1st position to the 4th, the label will change from 'A' to 'D', this change will also reflect in any existing calculation for example 'C-A' becoming 'C-D'.

If any data entry is deleted from the table, it will also be removed from any calculation it was a part of. This will result in an invalid calculation and the user will need to resolve that themselves.

To use calculations, Data type must be present as a column. There is a popup that will inform the user of this if they attempt to create a table or chart without following this step.



All Calculations must have unique names, which can be added in the 'Name' column. The Hide function allows data entries to be hidden on the table and chart, but still be used for any calculations it is a part of.

	Data type	Options/Calculation	Name	Hide
<input type="radio"/>	A Time actual	Value=Units, Option=Real	<input type="text" value="Time actual"/>	<input checked="" type="checkbox"/>

The Format column has been added to allow the display of formatting the calculated entries using 4D formatting strings. There is a tooltip on this field to assist users in understanding the options in terms of formatting.

Name	Hide	Format
<input type="text" value="Time actual"/>	<input checked="" type="checkbox"/>	
<input type="text" value="Target turnover"/>	<input type="checkbox"/>	
<input type="text" value="PO actual"/>	<input type="checkbox"/>	
<input type="text" value="Sales plan"/>	<input type="checkbox"/>	
<input type="text" value="Q1 Calculation"/>	<input type="checkbox"/>	<input type="text"/>

Enter format as positive:negative:zero eg: £###,###,##0.00-£###,###,##0.00;

If any circular/cyclic calculations are detected this will prevent data viewer from proceeding in the creation of a table or chart. Any pivot-ready or "data" (API) options will not include calculations.

### Increased detail on Activity reports when using 'Charge code' and 'Staff' data rows (3585)

When the 'Data-type to report on' is set to 'Activities' and the 'Value to Use' is set to 'Count', then charting or creating a table using 'Charge code' or 'Staff' produces a more detailed report.



**Data viewer**

**Views**

Data-type to report on

Data-type: **Activities**

Value to use: **Count**

Date to use: **Created date**

Negative values:

---

Dates & period

Date: **01/01/23**

Use a pre-set range?: **This year**

Daily  
 Weekly  
 Monthly  
 Custom

Number of months: **12**

**Update entry** Cancel

## Calendar bookings / My calendar

### Warning triangle next to the search box when collapsed teams present (7008)

A yellow warning triangle with tooltip appears to the immediate right of the search field when there are collapsed teams present, and the search field contains an entry. The yellow warning triangle serves to remind users that the search does not highlight bookings in collapsed teams.

12643  **Weekly** **12 weeks**

Bookings in collapsed teams are not highlighted

Person	Mon - Jun 05	Tue - Jun 06	Wed - Jun 07
Accounts			
Administration			

### Warning message in tooltip for loading view (7177)

When 'Loading view' is selected, the tooltip on the warning triangle reads 'Bookings in collapsed teams or collapsed loading slots are not highlighted'.

**Calendar bookings - Add event »**

123  **Weekly** **2 weeks** **Today** **<**

Bookings in collapsed teams or collapsed loading slots are not highlighted

### Selection for 'Booking description' added in the 'Booking description' drop down (8404)

A 'Booking description' option has been added in the preference option in 'My calendar' and 'Calendar bookings' within the 'Booking description' drop down.

### Booking descriptions for Outlook Calendar bookings in Synergist (9673)

Any bookings synced from Outlook will always show the bookings subject and description on the Calendar bookings and My calendar pages of Synergist, as any external booking will override the users booking

description preferences. This does not affect any Synergist bookings, which will continue to align with the user preferences.

## Miscellaneous

### Multi selection when adding charge code, resource code or team code (4017)

The drop-down menu has improved from a single select to a multi select when adding a Charge code, Resource code or Team code to:

- Staff record > Staff skills (Charge code field)
- Team record > Skills (Charge code field)
- Charge code > Resource skills (Resource code field)
- Charge code > Team skills (Team code field)

### Kanban tooltips improvements (6021)

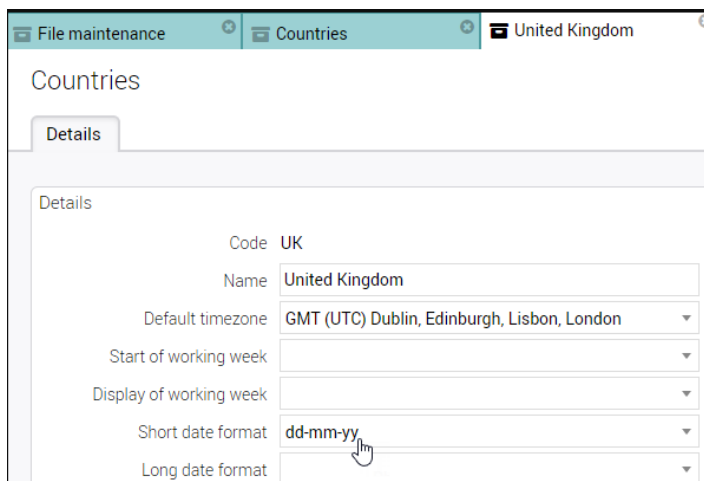
Most fields on a kanban card now have a single standard tooltip. This feature allows users to have minimal fields displayed on kanban cards and view details on the tooltip.

Please note that tooltips on the following kanban card fields remain unchanged and do not show the standard tooltip.

- Client
- Job
- Phase
- Stage

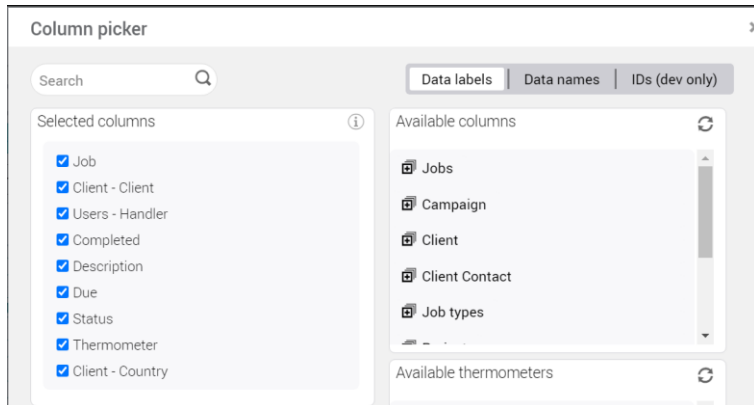
### Document templates using the company's date format (6180)

When creating a document using a document template with date short codes, the date format (i.e. dd/mm/yy) defaults to the company's country 'Short date format'.



### Column picker allows column selection from related tables (3690)

New column picker feature supports use of fields from other tables, and tooltips that will inform the user of the table each column is originally from by hovering over the table headers.



### Show/hide system views (4732)

System views can now be hidden/shown by altering the new option located in 'Preferences' and 'System parameters'.

The new dropdown in 'Preferences' is labelled 'System view' containing:

- Default (Use system settings)
- Show
- Hide

'System parameters' contains a checkbox on the settings page labelled 'System views to be hidden' in the 'Misc' section.

### Attachments download error text update (8007)

When an attachment with no content in it is attempted to be downloaded the following error is shown, 'Attachment data is zero length'.

### Column added to the 'Billing plans' table labelled 'Recog value' (8212)

A column has been added to the 'Billing plans' table for recognised value labelled 'Recog value'.

### Column picker options includes Client Type and Market Sector (3690)

Column picker feature supports use of Client type and Market sector for Jobs and Opportunities lists.

### Views drop down enhancements (7024)

When opening the views dropdown, the subheadings in the drop down have an added arrow button so they can be collapsed and expanded. The search function has also been added to the top of the drop down.

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