Version 10.5 release notes
July 2012

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SALES & MARKETING

Note: Please note this functionality is only available to users who have access to the Sales & Marketing module. If you are interested in learning more about this additional functionality, please contact your account manager or Synergist directly for a demonstration.

Targets

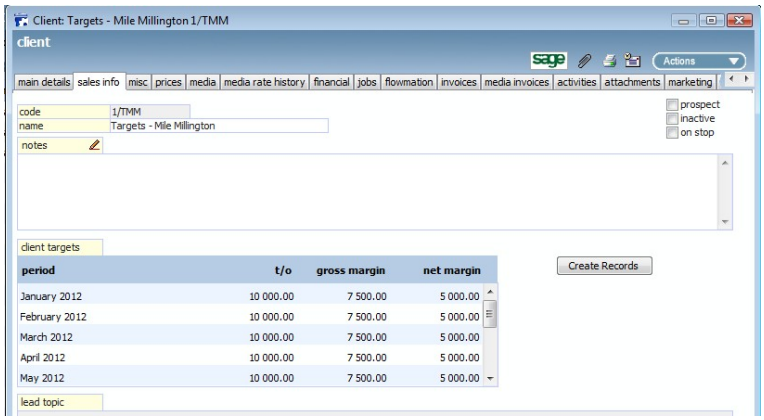
Targets are now supported for “external” clients (i.e. real organizations) as well as for “internal” clients. Targets can be set up using turnover, gross margin and net margin figures. These targets are then used in the pipeline tool to track sales performance. For more in-depth analysis the data viewer can also be used to display actuals against targets.

There are two types of targets:

- Internal targets
- External targets

Internal targets

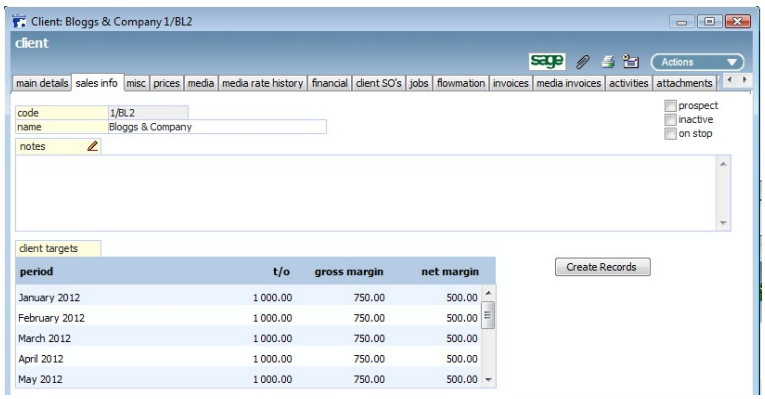
Internal targets are general targets set up on an “internal client” to set a target for an account handler / sales person. In this example a set of targets have been set up in 2012 for a specific handler - Mike Millington.



External targets

Similarly, you can set up targets for repeat business on external (real) clients. In this example a set of targets have been set up in 2012 for a specific client. Since each client has a related handler, external targets form part of the overall target for each handler - they are additional targets

Overall target:
Mike Millington may have a monthly target for new business & non-specific repeat business of £10,000 per month, with an additional client specific target for four key clients of £1,000 per month. Resulting in an overall target of £14,000 per month



Viewing targets

To see these targets open up the “pipeline tool” or use the “data viewer” (see below).

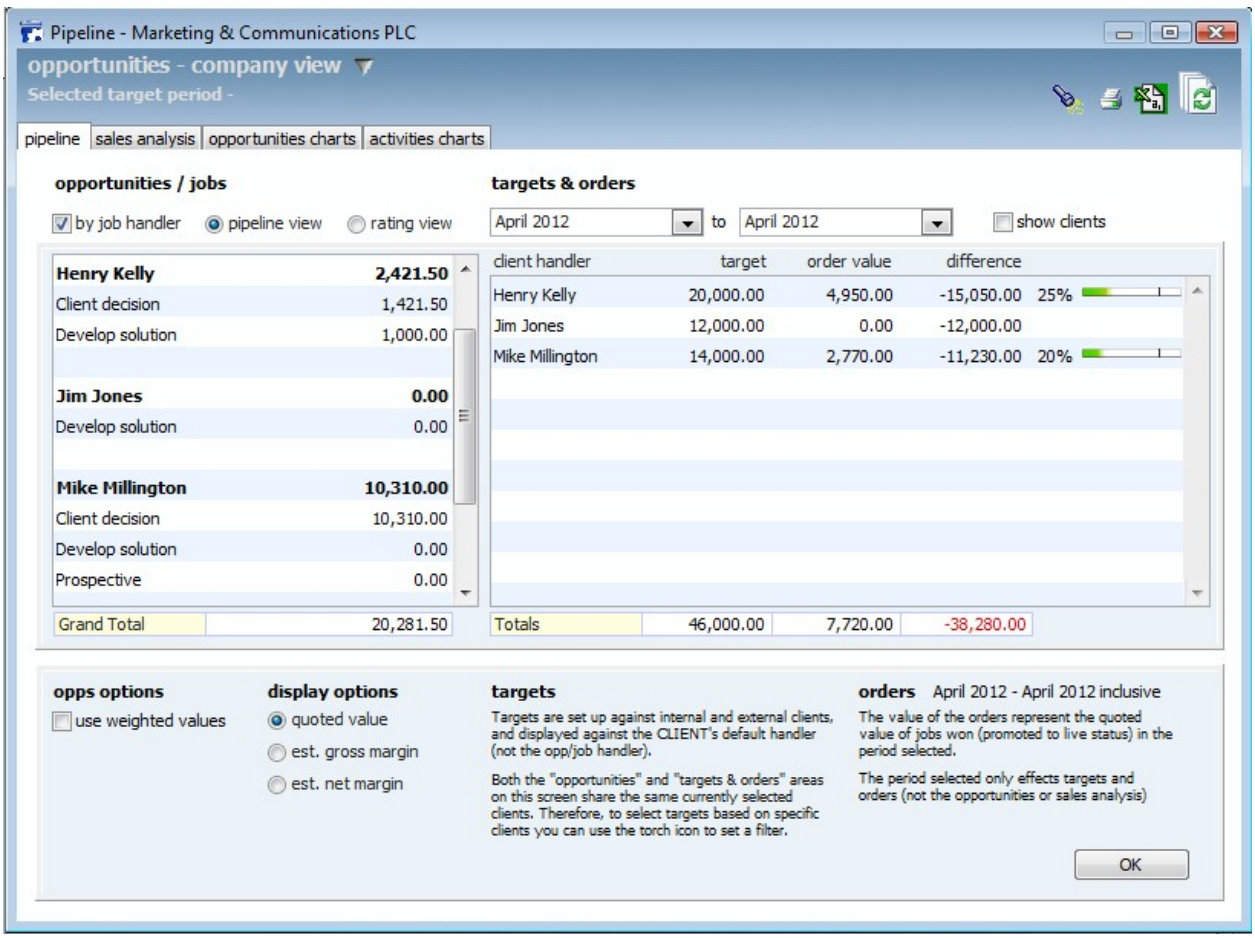
The pipeline tool

The pipeline tool has been re-designed to support external client targets. Here is a summary of the new layout:

Opportunities

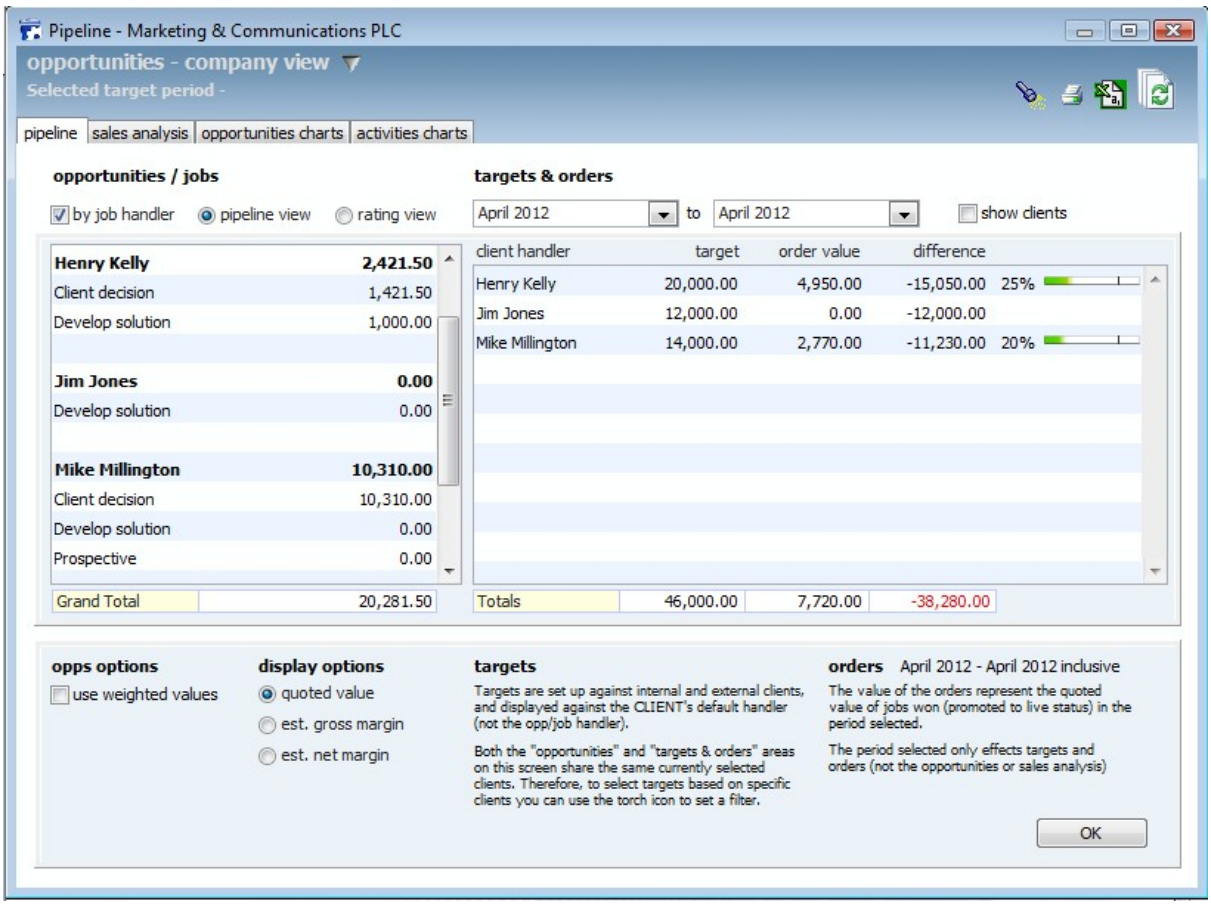
The left hand pane displays open opportunities. These are jobs at “quote” status (i.e. not yet live).
These can be summarised by job handler and their values broken down by either pipeline stage or opportunity rating. By default all open opportunities are displayed when you first open the pipeline tool. However, you can filter this in the normal way and set up custom views. For instance you may want to filter the opportunities by “expected close” date to list only the value of orders you expect to close in this month.

The values in the opportunities list can be “weighted” by entering a % weighting against each opportunity. For companies that prefer to look at sales from a gross or net margin point of view you can also display values by margin, rather than the quoted value. However, this does mean opportunities will need estimates.



Targets & orders

The right hand pane displays “targets and orders”. Targets are set up against internal and external clients, and listed by associated account handler. The order values are the quoted values of the opportunities that have been promoted to “live” status during the selected period.



Show clients

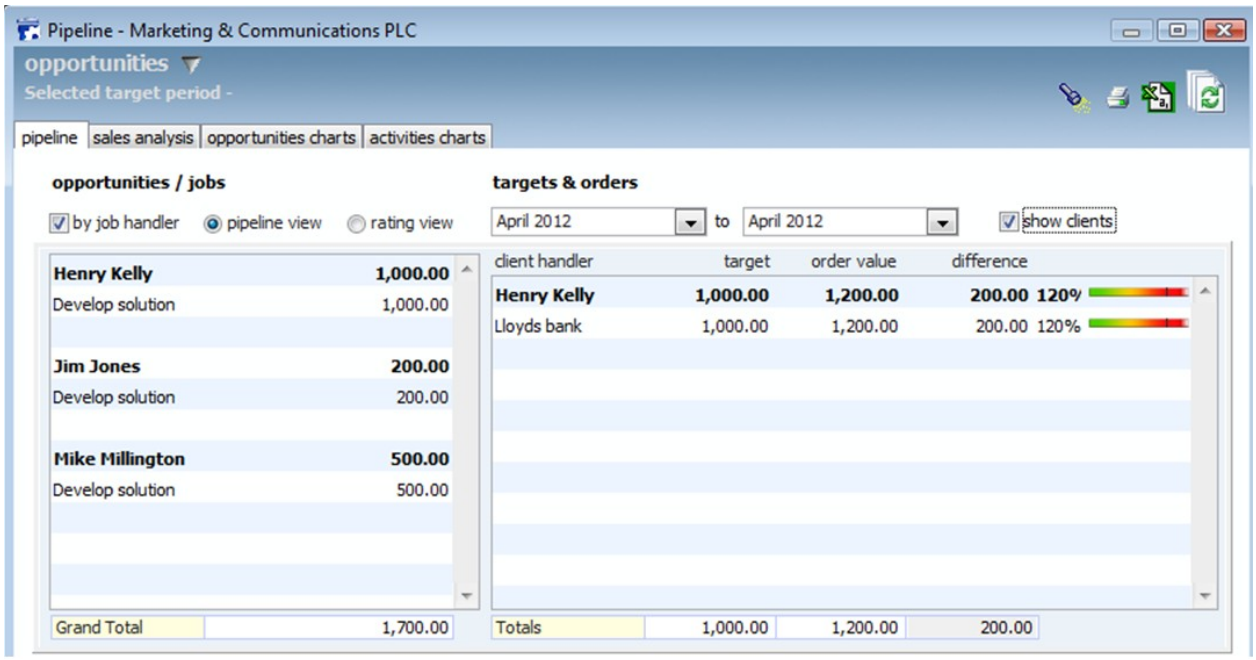
If you tick the [ ]show clients checkbox you will see the full breakdown, from a client perspective, of how the targets are made up, and against which clients orders have been won.

client handler	target	order value	difference	
Henry Kelly	**20,000.00**	**4,950.00**	**-15,050.00**	**25%**
Mirror Group	1,000.00	0.00	-1,000.00	
Lloyds bank	1,000.00	1,200.00	200.00	120%
Lotus (stockport)	1,000.00	0.00	-1,000.00	
Hondura	1,000.00	0.00	-1,000.00	
Granada	1,000.00	2,750.00	1,750.00	275%
jay acct	1,000.00	1,000.00	0.00	100%

The “Opportunities” and “Targets & orders” views

These two views are essentially separate views and are displaying different data. However they do share the same client filter. If you click the torch icon and opt for a selection of clients (for instance – all clients in the “Banking industry”) both the opportunities and targets & orders will be filtered to only show “Banking Industry” clients, orders & opportunities.

In this example there is just one client that falls into the category of “Banking Industry” - “Lloyds Bank”.



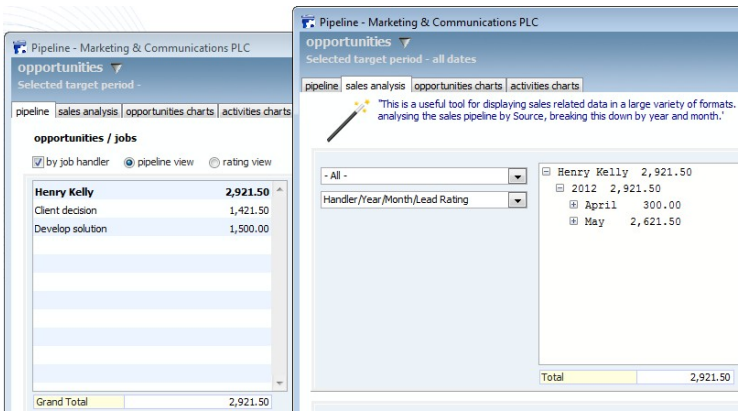
Job handlers & account handlers

Notice, in the example above, there is just one client handler on the right in the targets & orders area, and yet there are three job handlers in the opportunities area. This is because three different handlers have worked on opportunities for Lloyds bank (and are set up as job handlers on these opportunities), but the target is held against the bank, and by association, the bank’s main client handler Henry Kelly. If these opportunities are promoted to live orders they will appear as orders against Henry Kelly’s targets.

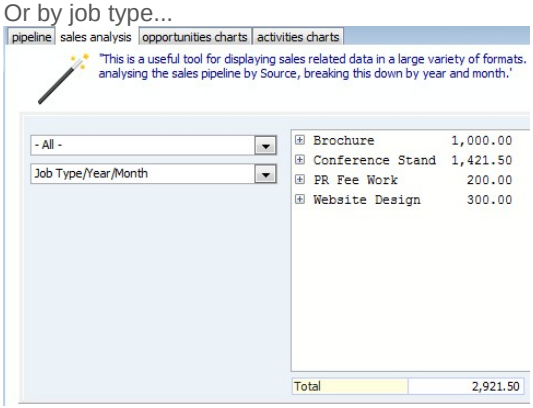
Sales Analysis

The sales analysis tab uses the same dataset as is used for the pipeline opportunities tab. You can therefore use the sales analysis tab to view the opportunities reported in the pipeline using a variety of different “cuts”.

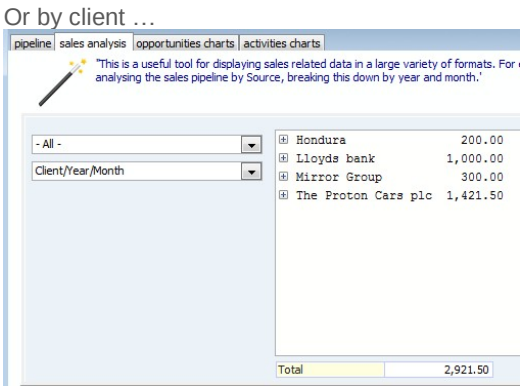
By expected close date...



Or by job type...



Or by client …



.. Etc.

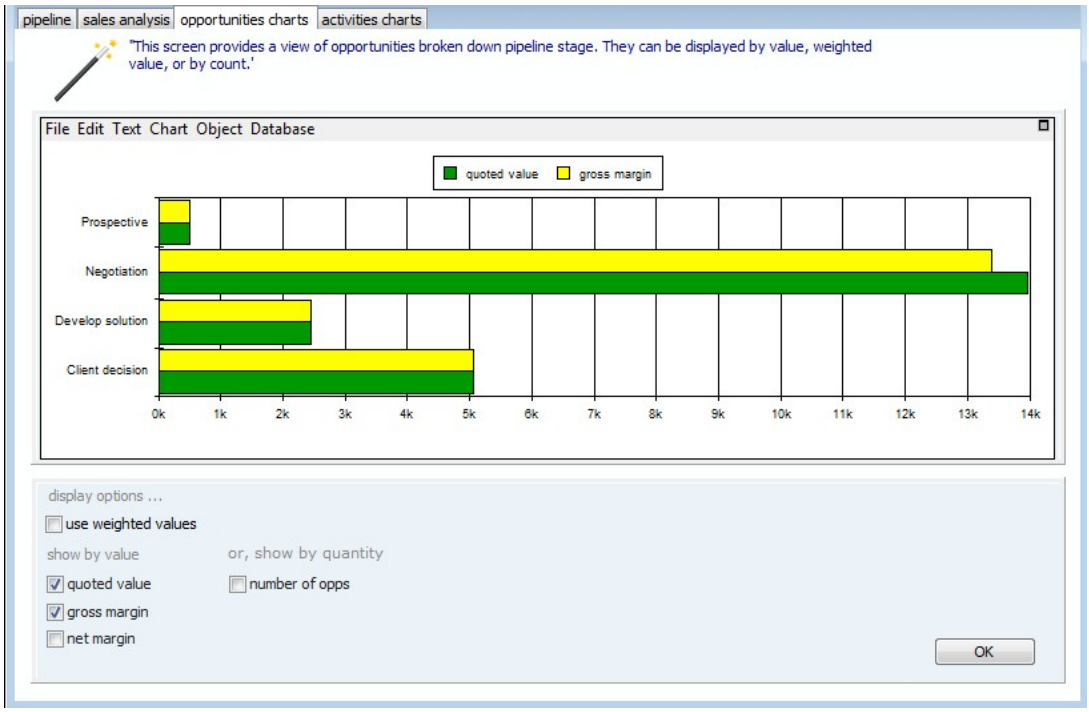
Sales Analysis – reporting

You can export any of the views selected above to Excel for further analysis...

	K	L	M	N	O	P	Q	R	S	T	
1	Expected close	Promoted	Quoted date	Closed Date	Final Invoice Date	Source	Quoted	Gross Margin	Net Margin	Quoted Weighted	Gro
2	16/05/2012	00/00/00	00/00/00	16/05/2012	00/00/00	* No Source	200	200	200	0	
3	23/05/2012	00/00/00	00/00/00	23/05/2012	00/00/00	Purchased leads	1000	1000	1000	0	
4	26/04/2012	00/00/00	00/00/00	26/04/2012	00/00/00	* No Source	300	300	-790	0	
5	01/05/2012	00/00/00	09/06/2010	01/05/2012	00/00/00	* No Source	1421.5	1421.5	561.5	1421.5	

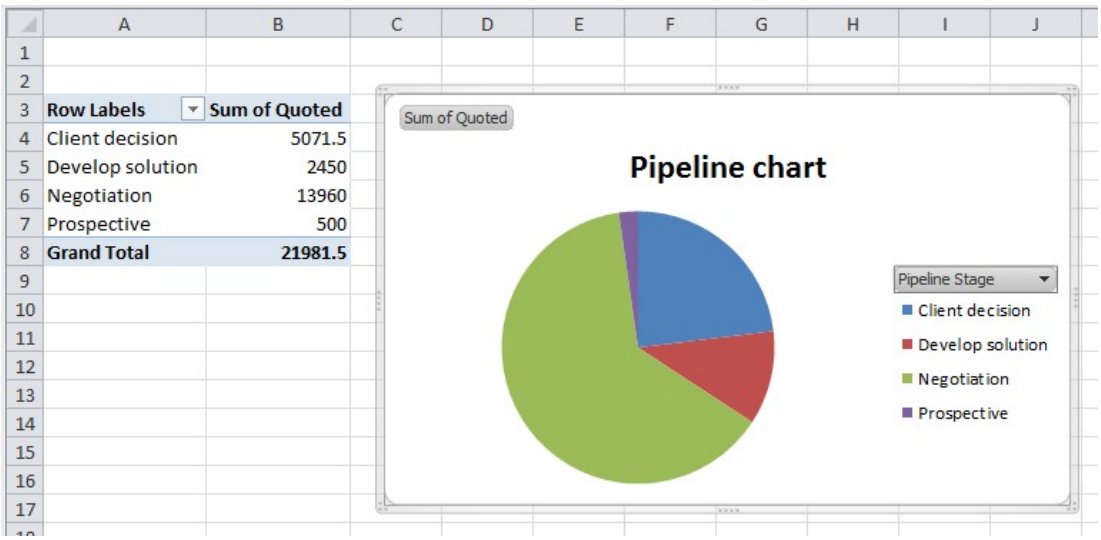
Sales Analysis – Charts

There are built-in charts available under the “opportunities charts” tab.



Excel

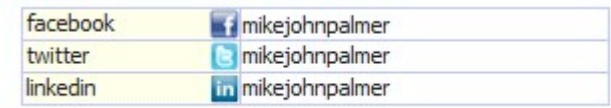
For fully customizable charts we suggest the exported data is pasted into Excel. From here a wide variety of sales charts can easily be created.



Social networking

Client/Supplier contact fields

We have added fields in synergist that you can use to store the usernames for social networking sites. These links are also available in the Staff Portal.



- **Facebook**
  Enter the contact's Facebook username. Clicking the icon will then open a browser with the appropriate URL:
  https://www.facebook.com/mikejohnpalmer

- **Twitter**
  Enter the contact's Twitter username. Clicking the icon will then open a browser with the appropriate URL:
  https://twitter.com/#!/mikejohnpalmer

- **LinkedIn**
  Enter the contact's LinkedIn public profile. Clicking the icon will then open a browser with the appropriate URL:
  https://www.linkedin.com/in/mikejohnpalmer

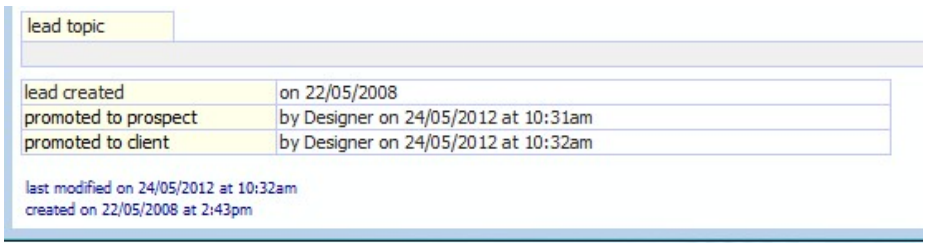
Marketing Lists & Campaigns

Field size increases

Marketing list and campaign names / source fields have been increased in size.

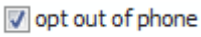
Lead/prospect promotion dates

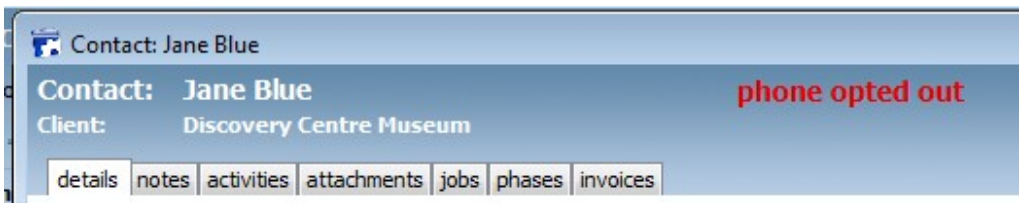
These can now be clearly seen at the bottom of the "Sales info." Tab of the client card.



Phone opt out flags

If the "phone opt-out" option has been set the client and/or client contact input forms show this information in red.





Note: if the checkbox is set at the client level all contacts will display this message, as well as the client card.

Leads & prospects

We have made some minor modifications to the functionality of Leads & Prospects

Contact list

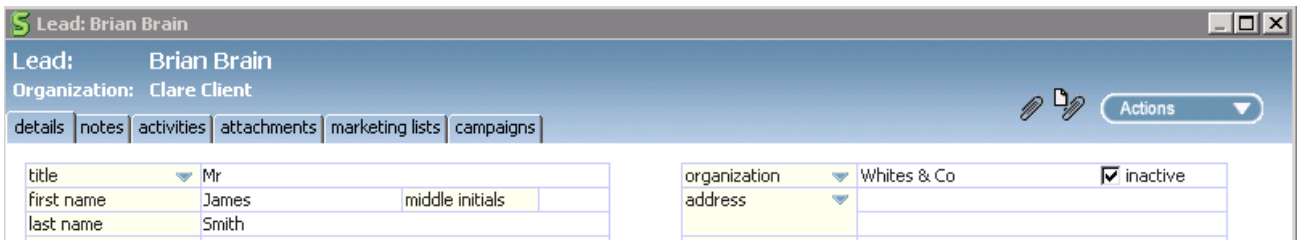
If a lead is clicked from the contact list the contact input form is now opened – giving full access the contact details, rather than the lead input form. The lead input form is still accessible from the leads list.

Inactive contacts

For leads that have more than one contact, it is now possible to make an individual contact inactive – rather than the entire lead. It is only possible to do this if there is at least one active contact remaining on the lead.

Inactive leads

It is now clearer when a lead is inactive. Previously the inactive state of a lead was only deducible from its “lost” status



Viewing a lead via the organizations list

Lead status is now visible when a lead is displayed using the prospect input form (multi contact view)

System views

The system views for leads have been altered to take into account the new flexibility in allowing individual lead contacts to be made inactive. If you have created custom views based on the previous system views you may need to create new ones

SYNERGIST STAFF PORTAL

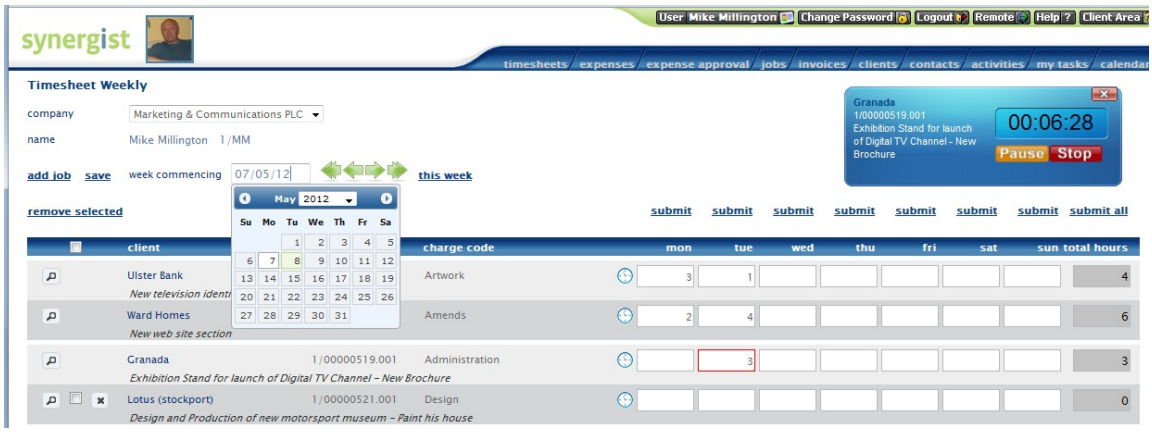
Note: Please note this functionality is only available to users who have access to the Staff Portal module. If you are interested in learning more about this additional functionality, please contact your account manager or Synergist directly for a demonstration.

UI Improvements

The portal has undergone some fundamental structural and UI improvements.

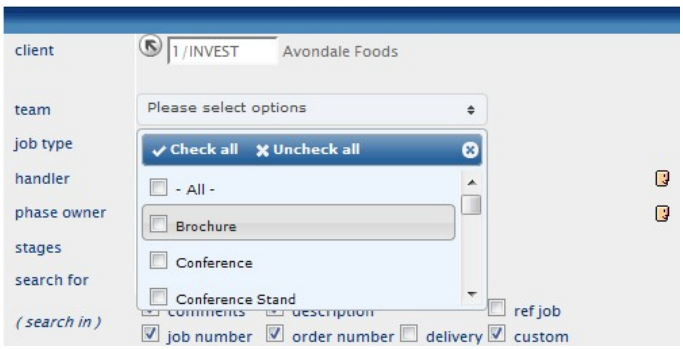
Weekly timesheets

The look and feel has been enhanced to improve usability. We no longer have multiple framesets so it is now possible to position the timer anywhere. Also, the “week commencing” date can now be selected using a calendar, as well as the forward & back arrows. The rows have been re-designed to make it easier to read the form and the previous options have been simplified to make using the weekly timesheet more user-friendly. This includes the option to multi-select the rows to easily remove tasks no longer required.



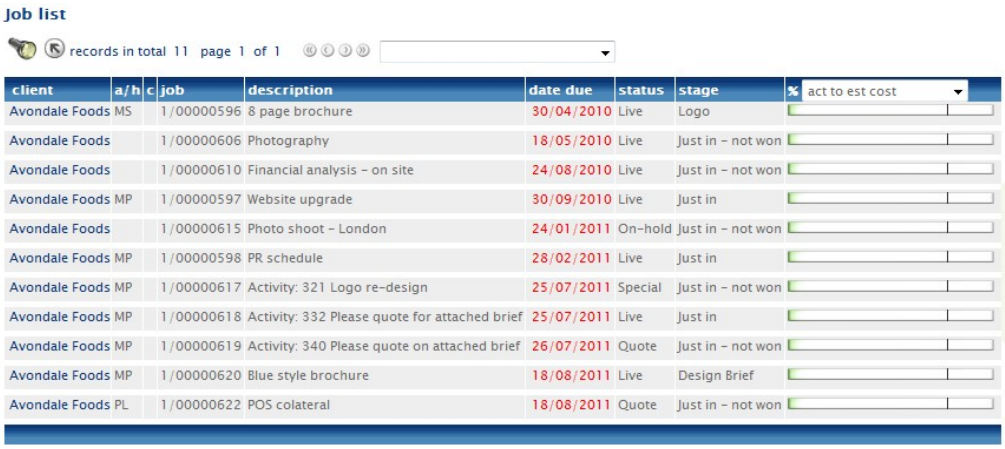
Selection screens

Attractive and easy-to-use query screens.



List screens

All the list screens have been enhanced to make them easier to read – with grey and white row shading and key columns displayed in bold. A single click is all that is needed to select a record (rather than a double click).

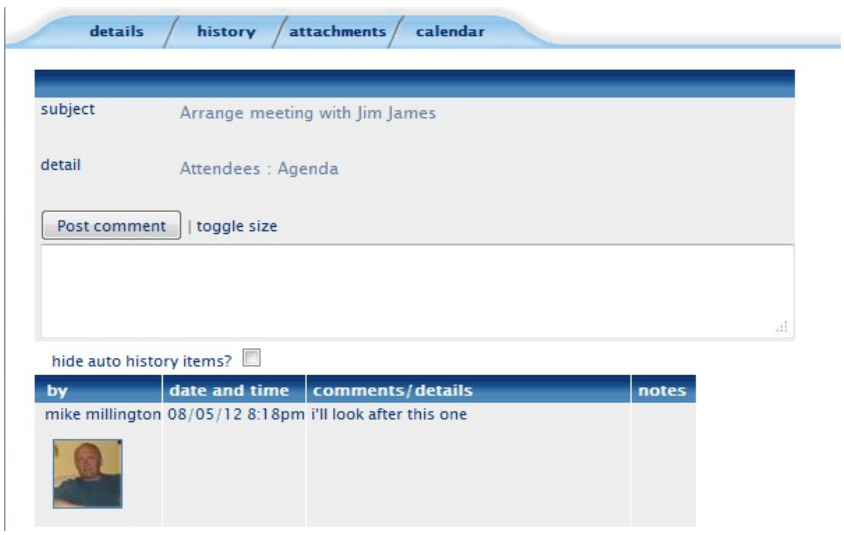


Personalise your portal

You can add your picture.

Messaging

If you are adding comments to messages (for internal communication or for communication with clients via the Client Portal) your picture will display next to your message.



Team calendar

The team calendar is a read-only view of staff bookings. You can see all the staff calendars or filter by “team”. This screen also has images of the team members to make it more user-friendly. **Note:** To actually book calendar items you need to be set up as a calendar administrator and access it from the Synergist client.

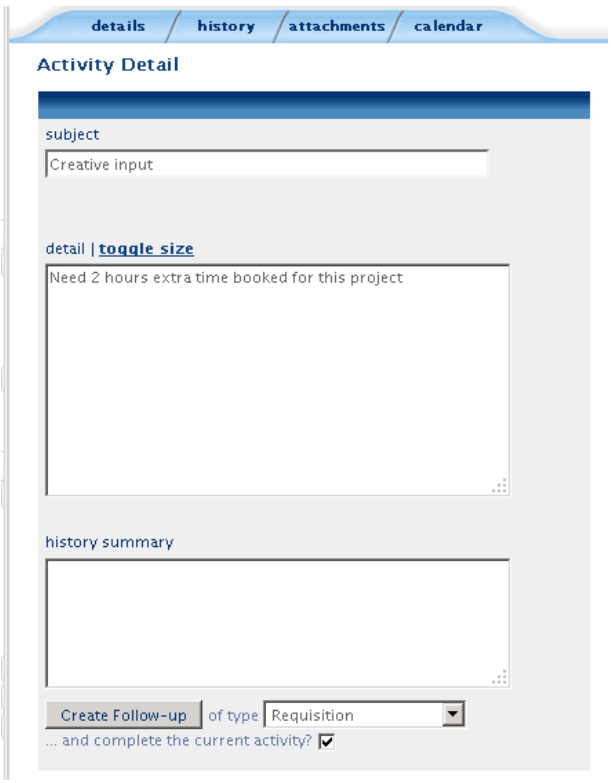
Copy job / templates

The staff portal’s advanced job creation feature has been improved. Custom fields (old style and new style) are now fully supported, and the UI has been enhanced.

Follow-up activities

Creating follow-up activities

This feature is now available from within the web portal. This can be a useful for any staff who are using the web portal calendar to see tasks alloted to them via the work allocation caledar. If additional time is required to finish an allotted task the user can drill down from the web diary to the original work requisition and from there create a follow-up work requisition. The traffic manager will then see the request for additional time appearing the in work allocation calendar as a pending requisition..



DATA VIEWER

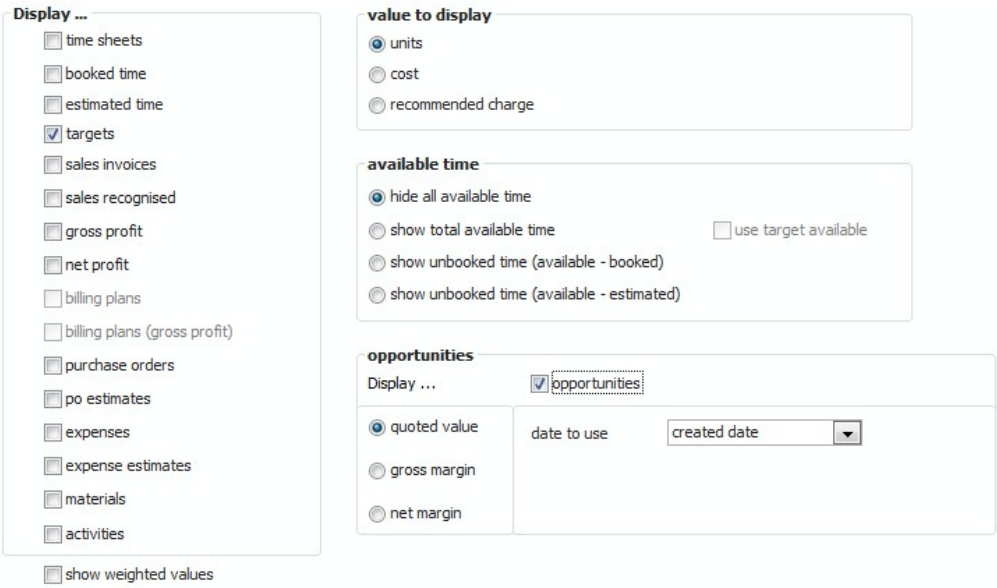
Targets

Although the pipeline tool is ideal for tracking sales against targets, the data viewer can also be used with targets, and can track a far wider range of transactions.

For example - to track opportunities against targets select the “targets” and “opportunities” checkboxes on the “display options” tab of the data viewer. This will display the quoted value of jobs/phases against targets.

Note: If gross/net margin had been selected the system will automatically display the gross/net target figures instead of the target turnover..

Display options

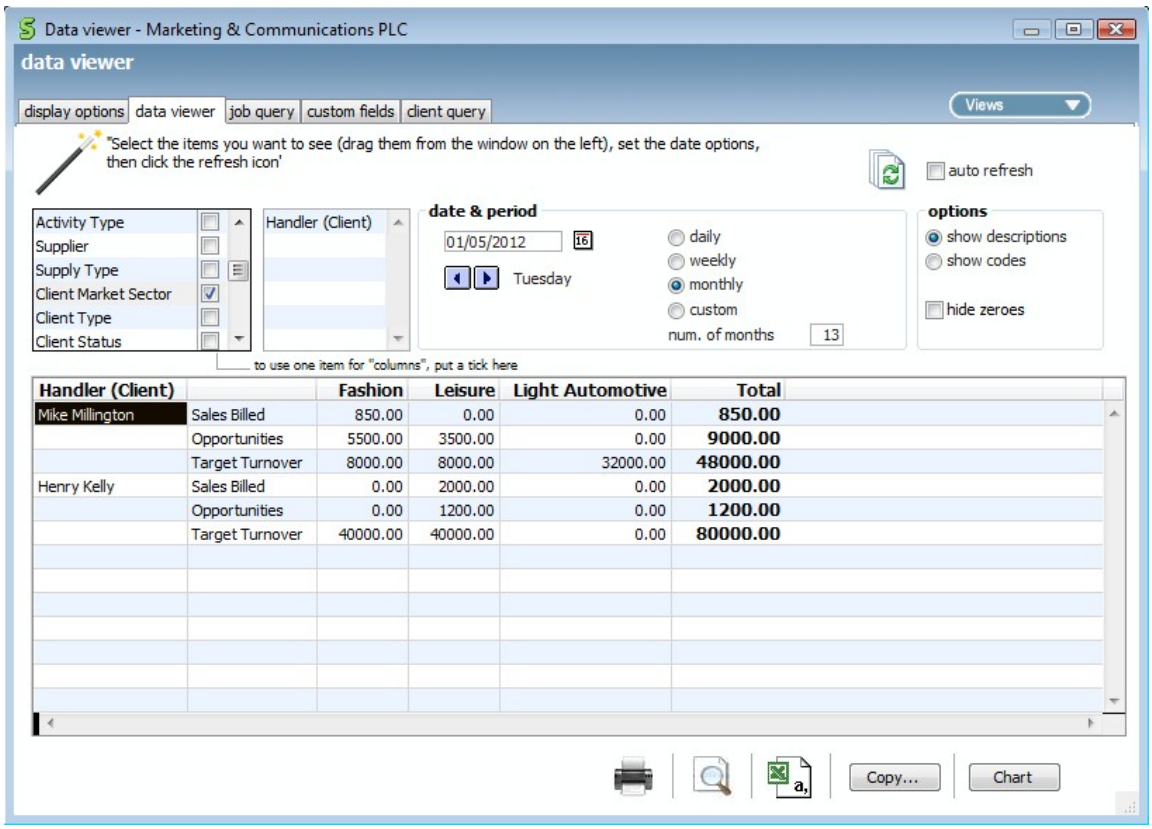


Selecting a similar range in the pipeline tool will display target v. orders.

Data viewer - targets

Using the data viewer you can see the same data, but in this example sales invoices have been added to the view, and the data has been further broken down by market sector.

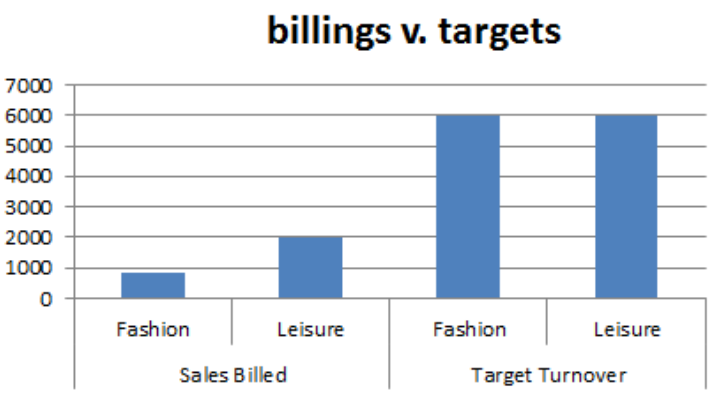
Note: Here the new “Client handler” option being used. It is against client handlers that targets are held.



Outputs

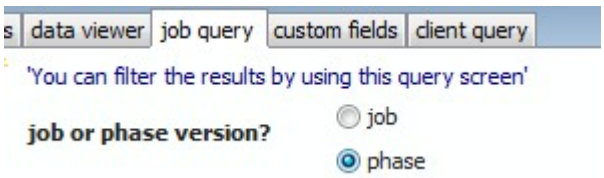
Once you have selected the information you wish to display it is very easy to paste the formatted data into Excel. (Click the “copy …” button)

… and create instant charts



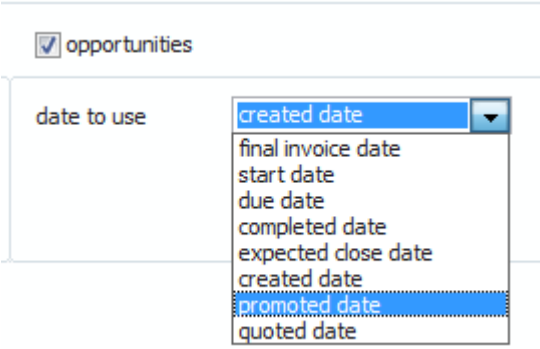
Phase & job level filtering

The ability to filter data in the data viewer has been enhanced. You can now specify whether you are querying at job or phase level – similar to the way job/phase views and reporting works.



Date filtering - opportunities

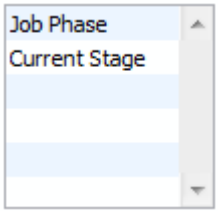
A larger range of date filters are available on all job and phase level query criteria screens. These are also available in the data viewer when viewing quoted values. In order for the data viewer to match the dates used for displaying orders won in the pipeline tool, use the “promoted” date.



Reporting "stages"

Current stage

If you select "job phase / current stage" in the cutter...

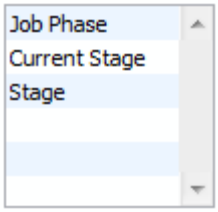


You can list data from phases using "current stage" as a description
Note: If you have your current stage set at job level rather than phase level, the job level stage be displayed.

Job Phase	Current Stage		May 12	Jun 12	Jul 12
1/00000632.001 - Conference (London)	Design Brief	Estimate Remaining	8.60	13.39	0.00
1/00000632.002 - Design	Functional Development	Estimate Remaining	10.97	10.02	0.00

Schedule stage

Adding "stage" to the cutter…



If you have two-tier jobs (those with a schedule of stages linked to estimates), you can further break phases down by all the stages specified.

Job Phase	Current Stage	Stage		May 12	Jun 12
1/00000632.001 - Conference (London)	Design Brief	Just in - not won	Estimate Remaining	3.13	4.87
		Design Brief	Estimate Remaining	3.13	4.87
		Functional spec	Estimate Remaining	2.34	3.65
1/00000632.002 - Design	Functional Development	HTML & CSS layouts	Estimate Remaining	5.75	5.25
		Functional Development	Estimate Remaining	5.22	4.77

Note: in the above view we are reporting on "Estimate remaining". This is a new entity and represents the estimated time less any timesheets that have been booked against specific estimates.

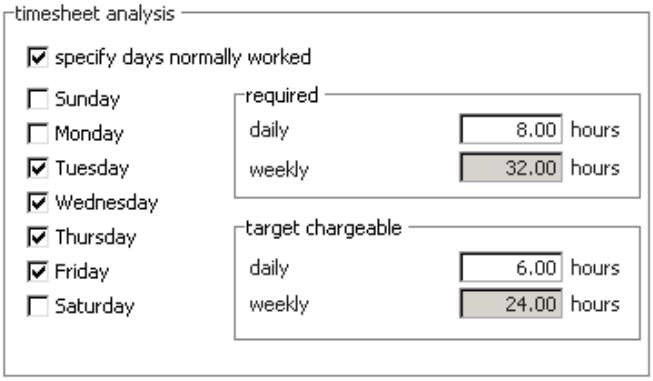
CALENDAR

Non-working days

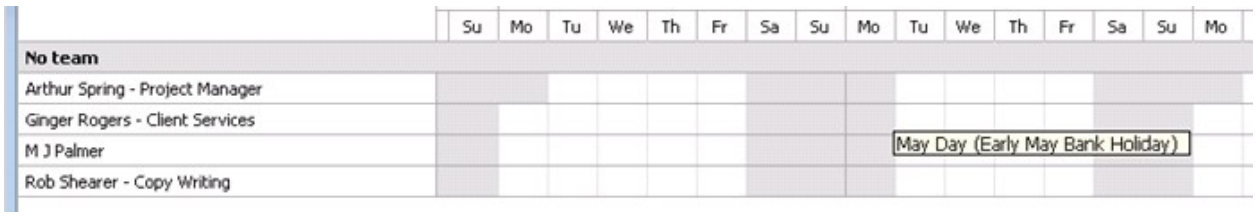
User level non-working days

Staff set-up in file maintenance

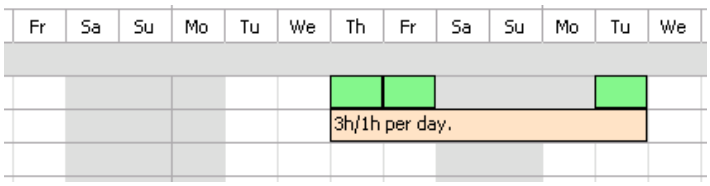
It is now possible to specify which days of the week a member of staff works. When the day-of-the-week checkboxes on the left are selected the system calculates the total number of hours the member of staff is expected to work (and submit timesheets) based on the number of working hours in the day (which can also be set for each member of staff).



Once the system has been informed of the days of the week a member of staff normally works the calendar can take this into account. Here is an example from the calendar. Mondays are greyed out for this member of staff, along with week-ends. There is also a Bank Holiday Monday greyed out for all staff. (This is set as a "non-working day" for the company in file maintenance).



If a booking is created and dragged across from the Thursday to the Tuesday the system automatically adjusts for the day the staff member's non-working days.



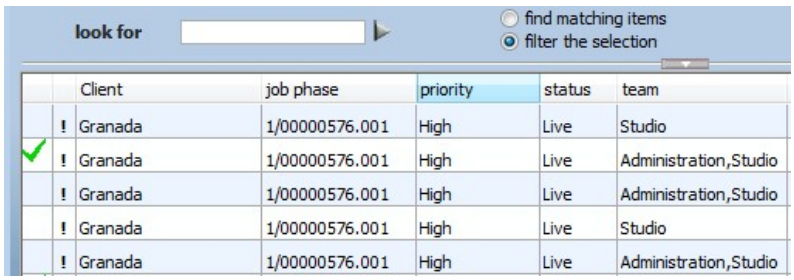
Country Level (non-working days)

Non-working days can now be specified for each country (see File Maintenance). Previously these were system wide.

Task selection list

Priority column now displayed.

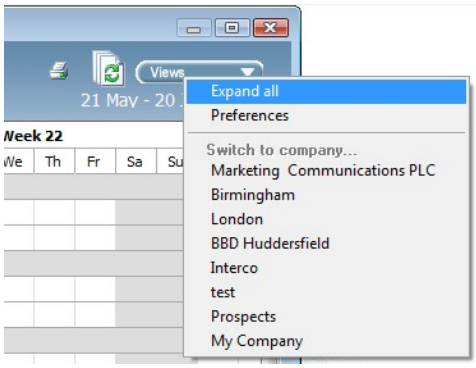
The system first looks to see if a priority has been set at the job phase level. If it has not been set on the phase the job priority setting is used instead.



Expand/collapse

Top part (calendar)

The expand/collapse option on the "views" menu is now automatically saved back to user preferences.

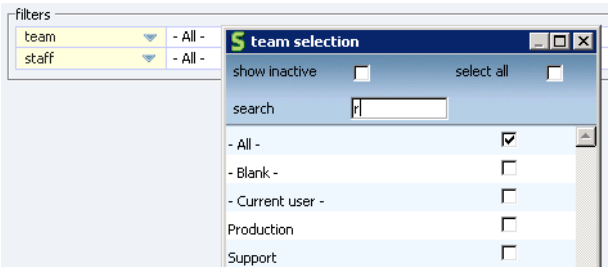


Teams

(Note: see section "teams" under "jobs & Phases")

Top part (calendar)

Staff teams are used to filter the main diary area.



Lower part (job selection)

Both handler and staff teams are supported separately in the lower "job selection" area.

Multi time zone support

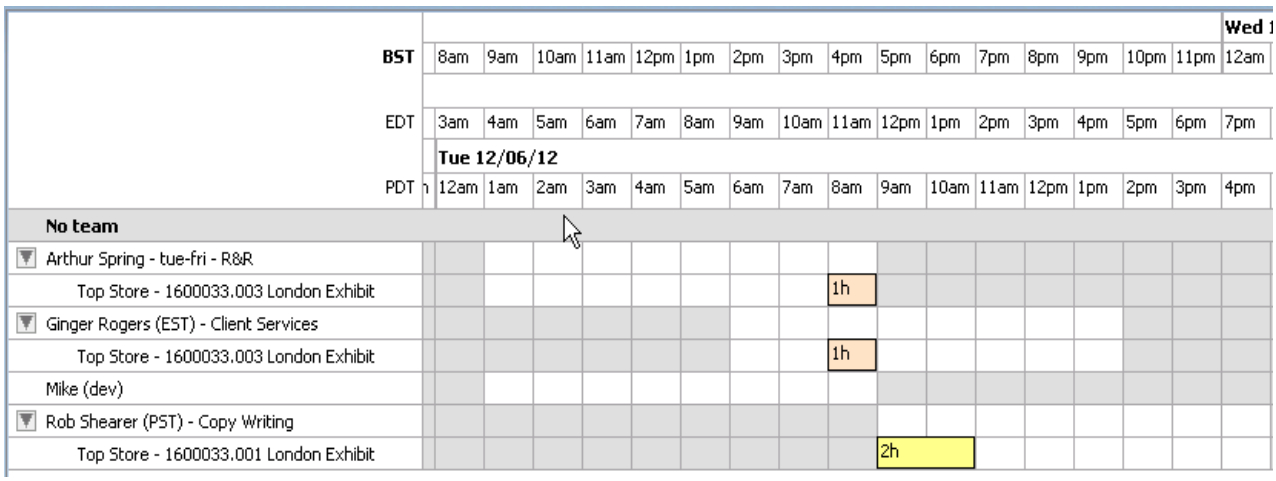
Synergist already supports multiple time zones and localization (date formats etc.). However, until this release, the work allocation diary/calendar used “floating time”. This meant a calendar booking was always considered to be in local time. Often this is perfectly sensible. However, if staff in different time zones are working in a collaborative fashion it can cause problems. For instance, a task due for completion at 5pm for a customer in London would need to be completed at Midday in New York in order to meet the deadline.

Therefore, in the calendar’s daily view (the view that specifies time-slots by the hour), we have introduced support for multiple time zones – using “real time”.

Calendar displaying multiple time zones

In this example only Arthur is working in the company’s main time zone (London - GMT). Ginger is in New York (EST) and Rob is in California (PST). Both Arthur and Ginger are working on the same job to the same deadline. Notice Arthur is due to complete at 5pm BST, while Ginger is due to complete the same job at 12pm EDT. This ensures that both Arthur and Ginger both complete the job at the same “real” time.

Note: In this example both countries are in daylight savings hence GMT is displayed as BST (British Summer Time) and EST is displayed as EDT (Eastern Daylight Time). The calendar automatically adjusts to ensure daylight savings are taken into account.



Start and end times for the working day

The calendar blocks out the out-of-hours periods in grey. In this example, the normal working day has been set to these parameters (in company settings).

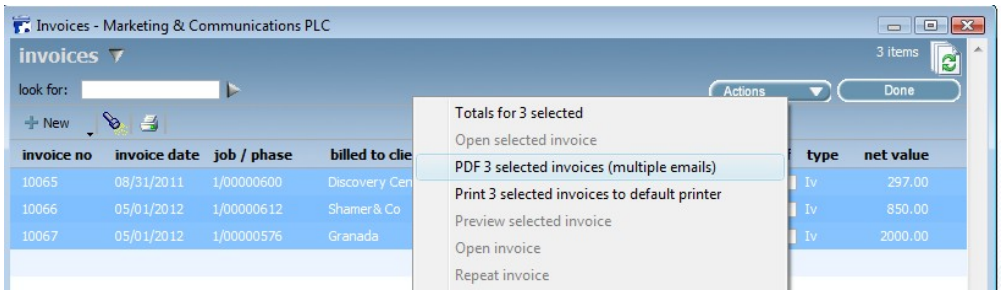
Therefore, it is clear to the user what is the valid start and end time (of the day) for each time zone. For example, Staff working in New York start their day 5 hours later than staff in the UK, in real time.

SALES INVOICING

Batch PDFing

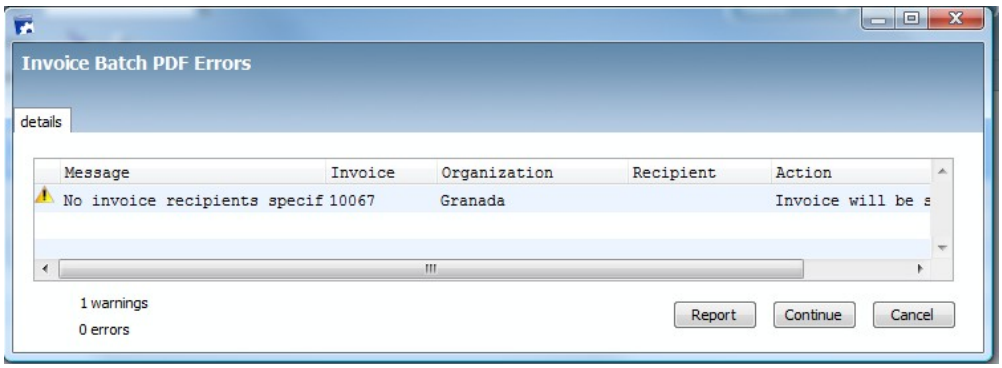
Selecting invoices to “PDF”

You can select a group of invoices and PDF all the selected invoices as a batch. This will typically create one email in Outlook for each invoice selected.



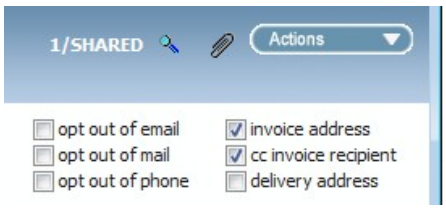
Error trapping

If the system finds that one or more of the selected invoices cannot be emailed, the system will produce a list of the errors. This error list can be printed and used to help correct missing data. **Note:** You will see this new error handling feature in other part of Synergist – anywhere a batch process needs to first do a “pre-flight-check” before progressing further.



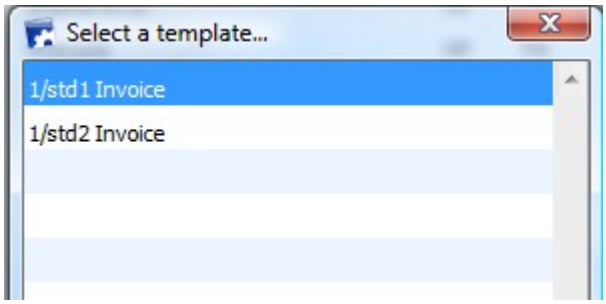
Setting a contact as an “invoicing recipient”

In this example the system has found an invoice where the client has not been designated an invoice recipient. All that needs to be done to correct this is to select a client contact and set the contact as either an “invoice address” (the main recipient) or as a “cc invoice recipient”. The “CC” recipient is simply copied in, in the email.



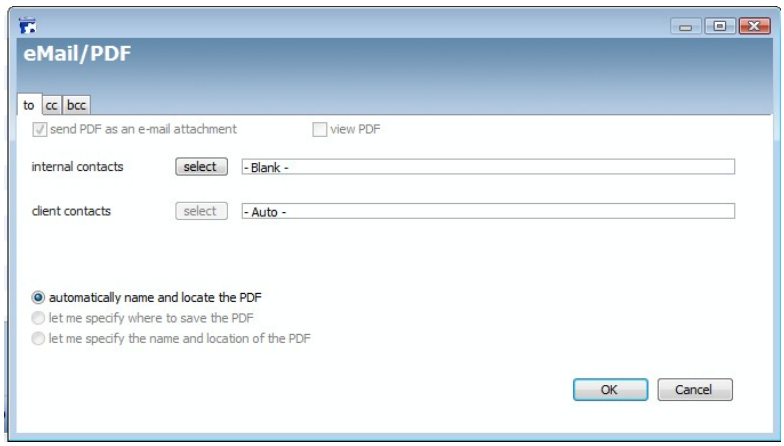
Template selection

You will be asked to select a template (if you have more than one template to choose from). The selected template will be used in the PDF creation of all the selected invoices.



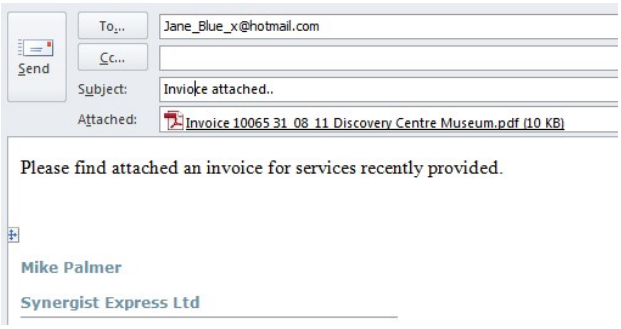
Email dialog

The email dialog box is displayed in case you wish to copy in internal contacts to the resulting emails. The actual recipient(s) are specified in the client contact record and therefore do not need to be selected.



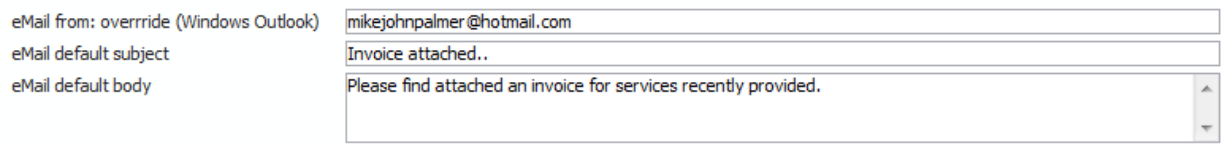
Emailing

On clicking OK the PDFs & emails are created. These will open in your outlook application as normal.



Additional options

Since you are creating a batch of invoices you may want to set up some default subject and body text. You can do this be amending your layout (in report designer). You will find these fields in “additional options” Note: The “override” field should only be used if you want the emails to appear to come from a different email address to your default one.

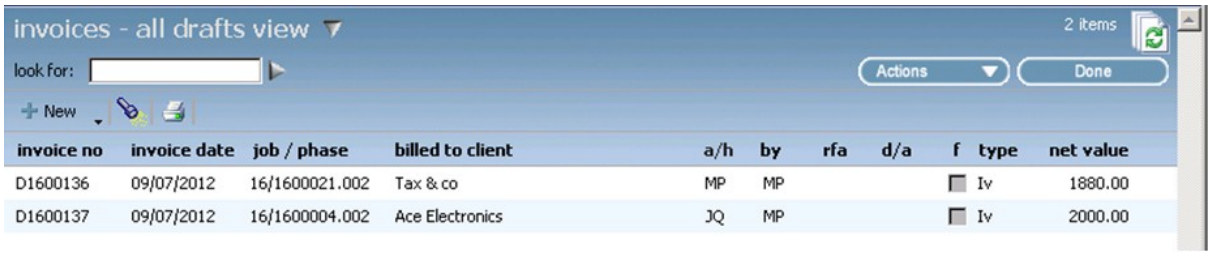


Batch draft invoicing

Batch draft invoicing enables the user to select a number of jobs and from these jobs produce a set of draft invoices.

From the main menu, select “Draft invoices”.

This will open up a list of existing draft invoices.



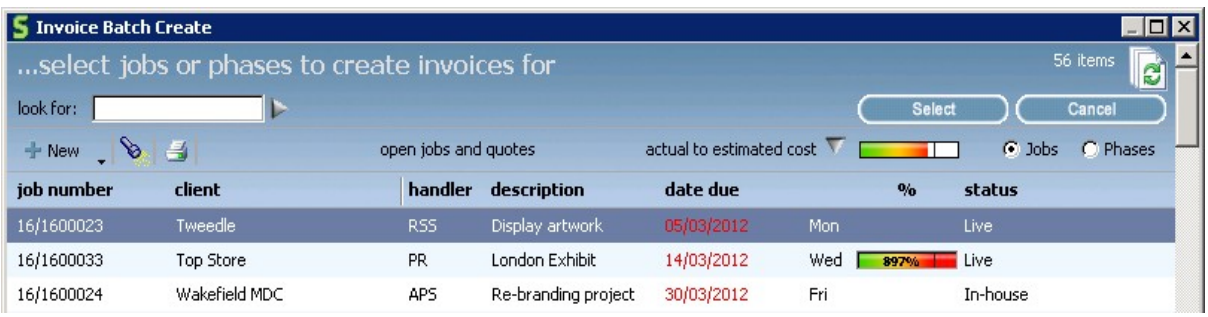
The “New” button

Clicking the “New” button displays various options with regard to creating draft invoices. From here you can select one of two batch invoicing options:

- “Batch draft invoice”
- “Batch draft invoice – current billing plans”
  (only available if you are set up to use billing plans)

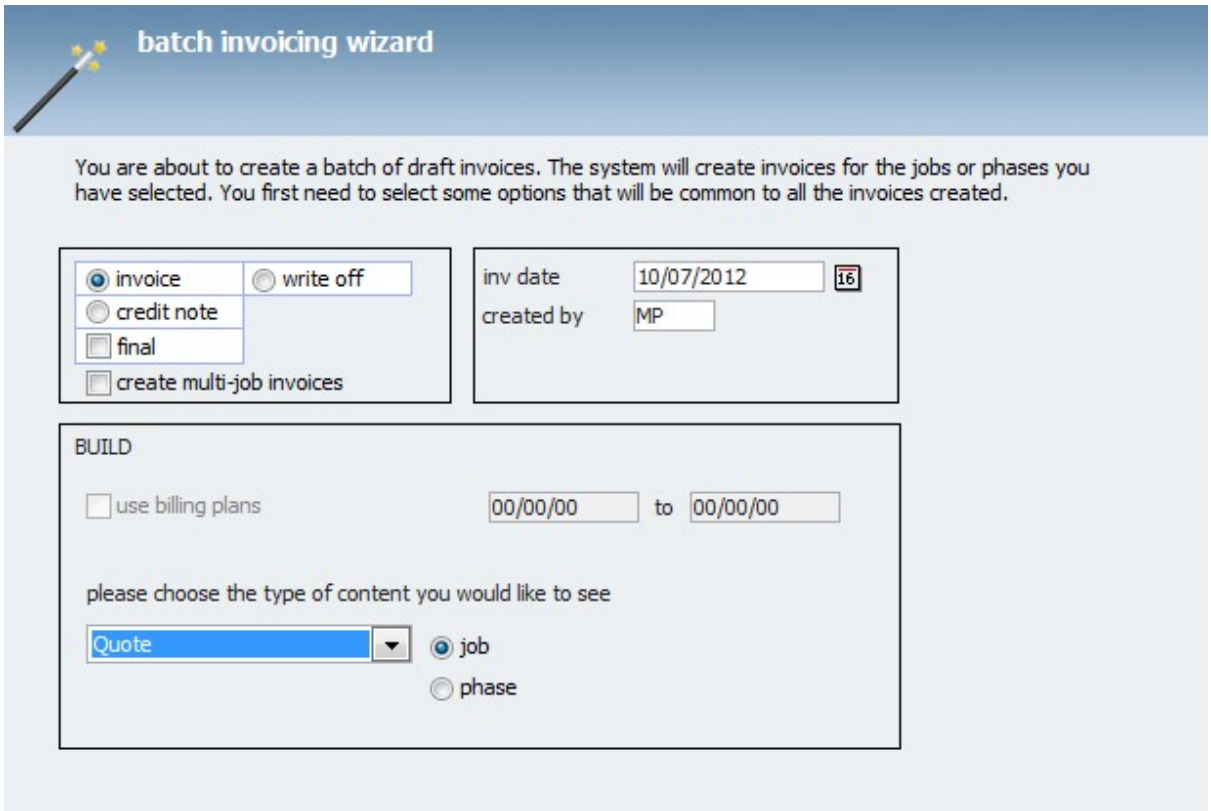
Selecting jobs to invoice

The user highlights jobs in this list using CTRL+Click / SHIFT+Click in the normal way, and then clicks the “Select” button to accept the highlighted jobs. Alternatively the user can click the torch icon to further refine the selection.



Batch Invoicing wizard

The user is now presented with the batch invoicing wizard.



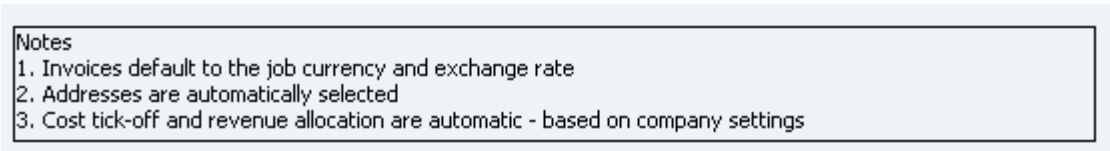
This screen is similar to the standard invoicing wizard – but with fewer options. The user can select to create either invoices, credit notes or write offs, and specify whether these should be “part” or “final” invoices.

In addition to this a “build” can be selected from the drop down selection list. The user can selected to build the invoices using job quotes, time & materials (“auto detail”), or using simple descriptions (“show wording”).

Whatever is selected in the wizard is applied to all the draft invoices that are to be batch created.

Defaults

With batch invoicing certain elements are selected automatically, based on company settings. This is explained in the lower part of the wizard.



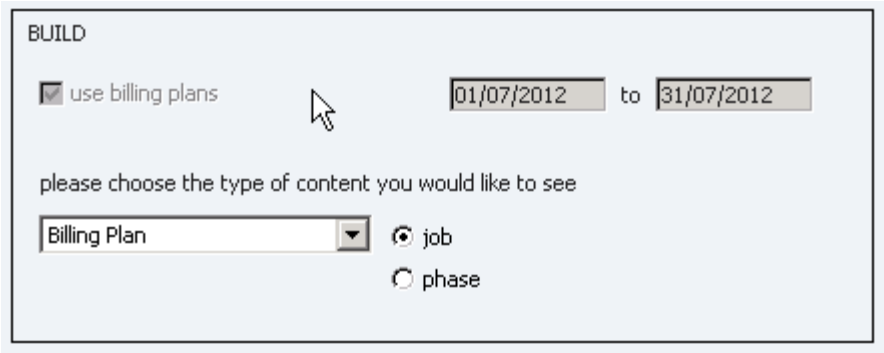
On clicking “Continue”, the draft invoices are automatically created – one per job. If the multi-job invoices checkbox is selected, one invoice per client is created instead

Batch draft invoice – current billing plans

If this option is selected from the main menu the system will select jobs based on un-invoiced billing plans. The system defaults to displaying all jobs that have un-invoiced billing plans for the current month. To change the selection simply click on the torch icon..

Batch Invoice wizard – billing plans

When billing by “billing plan” the build options available are “Billing plan” and “Quote”. If “Quote” is selected quote lines are used in the building of the invoice. These are adjusted, pro-rata, to take into account the amount planned to be billed in the selected period. Otherwise, you can opt to build the invoice using the ”Billing plan” option which will bring through to the invoice narrative entered into the billing plans themselves.



Billing from the job/phase list

Rather than start the process of batch draft invoicing from the invoicing list, as described above, you can also simply select jobs or phases from the job/phase lists, click the “actions” button and select “Batch draft invoice x jobs”

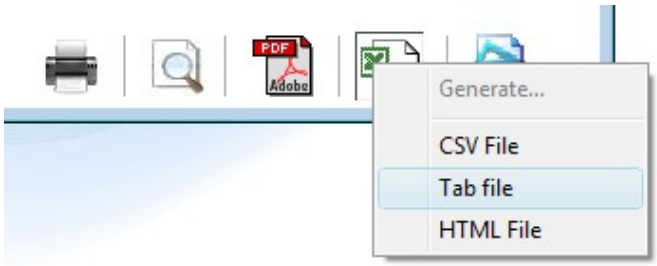
REPORTS

Manual reports

"Tab delimited" is now a supported export option for manual reports.

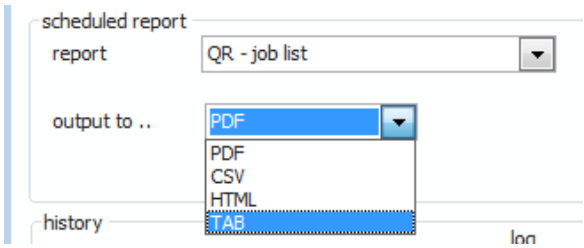
From within 4D Synergist

– Running a saved Manual Report



From within Synergist scheduler

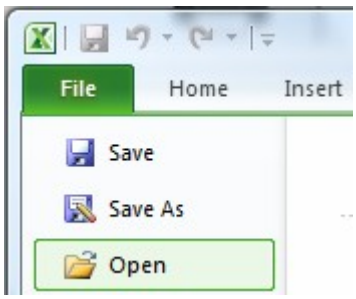
– Choose the format you require from inside "Utilities / Scheduler" when setting up the scheduled Manual Report.



Opening in Excel

Files exported in "tab delimited" format do not normally open correctly in Excel unless you explicitly open the file from Excel's File/open dialog, and select "tab delimited" in the file import wizard.

Therefore tab delimited files are saved by Synergist as ".TXT" files and instead of opening the file automatically Synergist simply opens the window's explorer in the file's folder. You should then use Excel to open the file manually from this location.



Report amends

Est. v Actual report

Client contact added to the export version of this report.

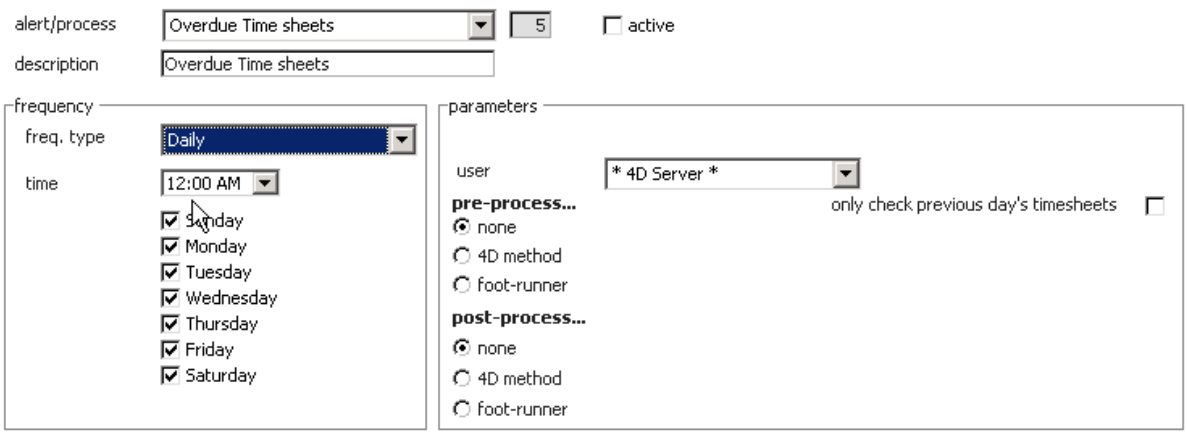
	A	B	C	D	E	F	G	H	I	J
1	Client	Job number	Job description	Job type	Handler	Contact	charge code	Percent complete	Estimated units	Actual
2	Avondale Foods	1/00000621	Web site 1	Website Design	MP	Mike Palmer	Amends	0	6	
3	Avondale Foods	1/00000621	Web site 1	Website Design	MP	Mike Palmer	Creative Design	0	80	
4	Avondale Foods	1/00000624	web site x	Website Design	MP	Mike Palmer	Administration	0	2	
5	Avondale Foods	1/00000624	web site x	Website Design	MP	Mike Palmer	Copy Writing	0	1	
6	Avondale Foods	1/00000624	web site x	Website Design	MP	Mike Palmer	Creative Design	0	32	
7	Avondale Foods	1/00000624	web site x	Website Design	MP	Mike Palmer	Design	0	4	
8										

Timesheets by day report

This report now includes staff's chargeable target hours in sub-totals when sorted by staff.
(Only applicable for the by day / by week options)

Late timesheet alert

New option on "late timesheets alert" to only look back to yesterday's timesheets (yesterday = previous working day). Scheduler screen generally improved plus added facility for "Daily" to enable the alert to run on specific days.



CLIENT PORTAL

Note: Please note this functionality is only available to users who have access to the Client Portal. If you are interested in learning more about this additional functionality, please contact your account manager or Synergist directly for a demonstration.

Alerts

When key actions take place on the client portal alerts can be sent to client portal users as well as to internal handlers.

Alerts are sent on these events:

- New job request – alert sent to the main client handler.
- New job created from a request – alert sent back to the user requesting the job.
- New message created – alerts sent to all staff and users allocated to the job.
- Comment added to a message – alerts sent to all staff and users allocated to the job.

Allocating users & additional handlers to a job

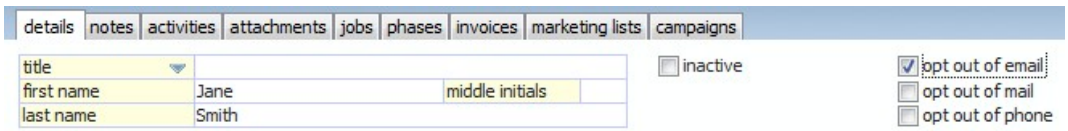
Each job has fields for the main client contact (job & phase levels). If additional client contacts are needed for this job they can be added as "job contacts" (using 4D Synergist).

Easy access back to the Client Portal system

If the alert is referring to a message or comment the user recipient can click on a link in the email. This will either open up the client portal on the appropriate message, or, if the user is not yet logged in to the portal, take the user to the login screen, and then, once logged in, redirect the user to the message.

Opting out or emails

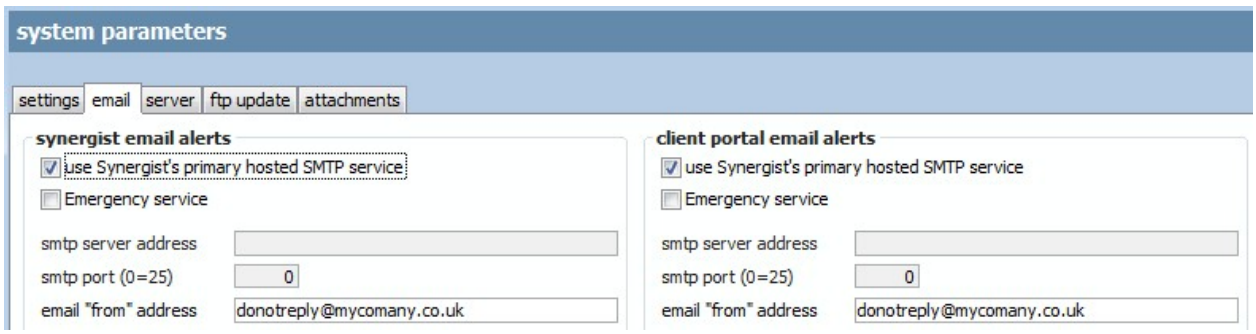
If a client portal user wishes not to receive email alerts he should message the main handler and asked to be removed from the client portal mailing list. The handler should then set the "opt out" flag against the user. This flag will stop this client contact being sent Client Portal alerts and also supress email campaign communications.



Setting up client portal alerts

This has been made far easier. You can now optionally use our hosted SMTP service for sending external Client portal alerts, and for sending other types of internal alerts. Just tick the checkboxes as per the example below, and enter a "from address". In the unlikely event that the main hosted SMTP service becomes unavailable the "emergency service" can be selected. The system will then use an alternative backup SMPT account.

Note: You can still use your own SMTP server if you wish, or use a separate SMTP server for sending alerts to external client contacts. In that case uncheck the "use Synergist's primary hosted SMPT service" boxes, and fill in all the details in the normal way.

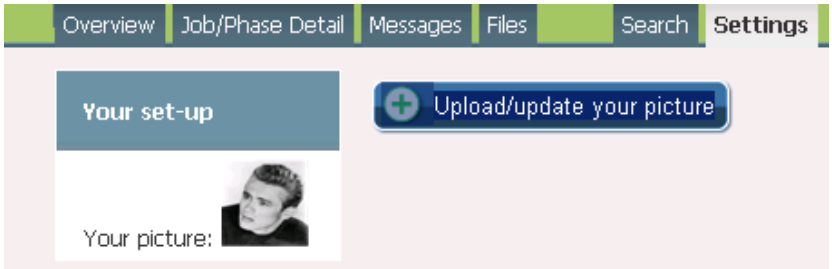


Customisation

A certain level of customisation is now available for the staff portal. Your company logo can appear on the login screen and your company colours and fonts can be used in heading areas.

User thumbnails

Users can upload thumbnail images of themselves (.png format required). These will then appear in message threads, along with pictures of account handlers.



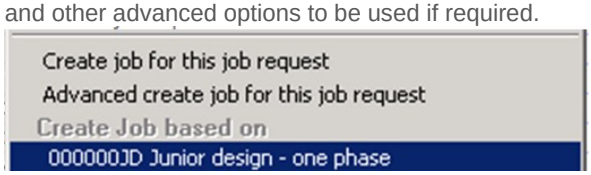
Job creation – from job requests

Multi-company issues.

If you have set up your system so clients are shared across multiple companies in Synergist your clients will optionally see jobs for multiple companies in the portal view. If a job request is then generated the system needs to know which company to create the new job in. Synergist will now look at your main handler and automatically create jobs in his default company, unless a job template is used in which case the new job is created in the same company as the job template.

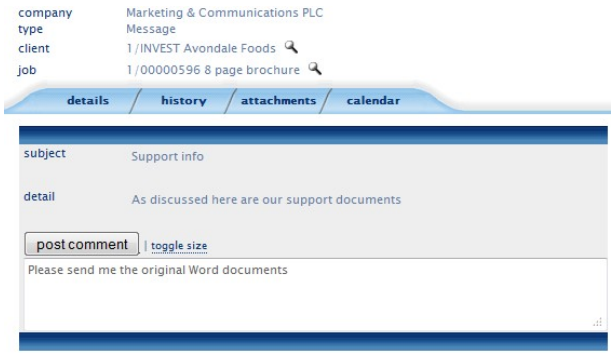
Advanced job create

An “advanced job create” option has been added to the “create job” dropdown. This enables own job numbers and other advanced options to be used if required.



Posting comments using the staff portal

The “detail” of the original message is now clearly displayed. Previously this was hidden from the view.



Localization

The Client Portal now supports localized date formats (e.g. USA style) and take’s into account timezone issues.

BILLING PLANS

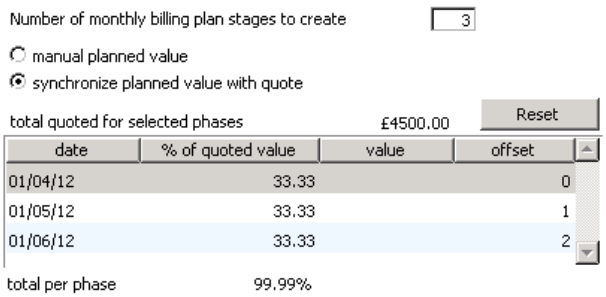
Enhancement of "Quick" billing plan feature

This feature has had some major extension to its functionality.

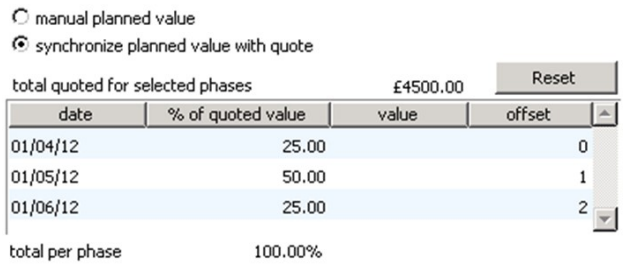
New Quick Billing Plan features:

- Fixed / relative dates.
- Option to create a number of BPs (in "multi-phase" mode, as well as job header mode).
- Option to see and edit the breakdown of the proposed auto-created billing plan entries before they are created.

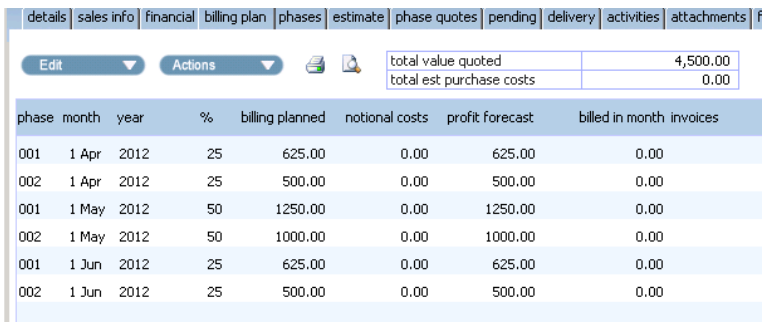
For instance, in a "synchronised with quote" scenario, in this example the user has selected to create 3 billing plan entries per phase (2 phases) …



The user can then manually change the % of the quoted value for each billing plan entry. The offsets can also be changed – in case the billing plan schedule needs to be altered.

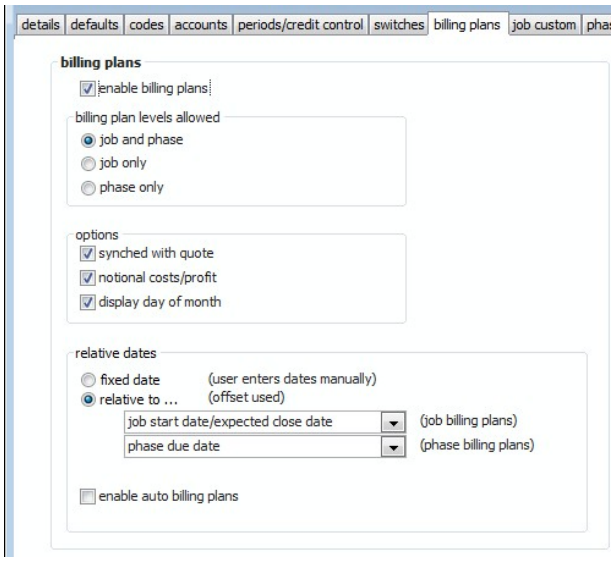


Resulting billing plan items...



Billing plan “levels”

Synergist allows billing plans to be created at both the job level and phase level. However, this can make it complicated when reporting. If you normally create billing plans on just one level (job or phase) you can enforce this be selecting “job only” or “phase only”.



JOBS & PHASES

Teams

You can allocate jobs, people, estimate items etc. to teams. All teams are defined in a single table. However, you can now divide teams into two main categories.

- Handler teams
- Staff teams

A single team can be considered a “handler” team, a “staff” team, or both.

code	description	type
16/ACC	Account Man.	Handler
16/ADM	Administration	Handler
16/DTE	D team	Handler & Staff
16/MAR	Marketing	Handler
16/DES	Production	Staff
16/STU	Studio	Staff
16/SUP	Support	Staff

By dividing your teams into these two categories you can control which teams appear for selection in different parts of the program.

e.g.

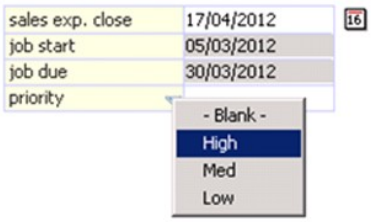
- Job card – handler team (sometimes called “job” team)
- Scheduled stages – Both types of team are supported
- Estimates – staff team
- Activities – both types of team are supported
- Calendar – both (see below)
- Charge codes – staff team

Job/phase priorities

By default priorities are set a 1-9. However, you can create more meaningful names like “high”, ”low”, “Critical” etc.

Set this up in “file maintenance”

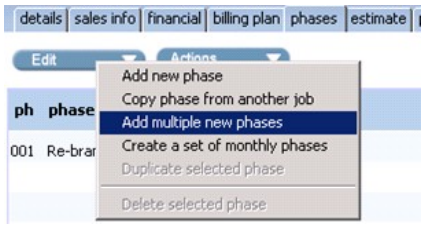
Viewed from a jobcard



Multi-phase selection

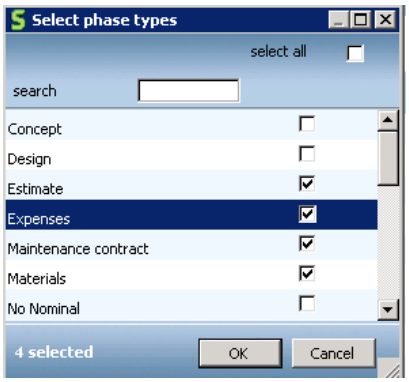
Creating multiple phases

From a job you can chose to create a set of phases by selecting the “Add multiple new phases” option.



Selecting phase-types

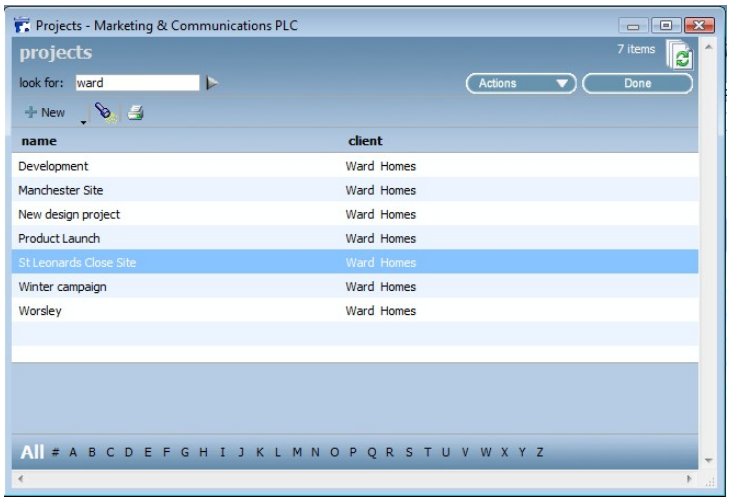
The new section screen makes this job easier. It has the standard search feature and checkboxes for selecting the phase types you wish to use.



Searching – Projects & Campaigns

Search / filter

New options added to projects & campaigns.

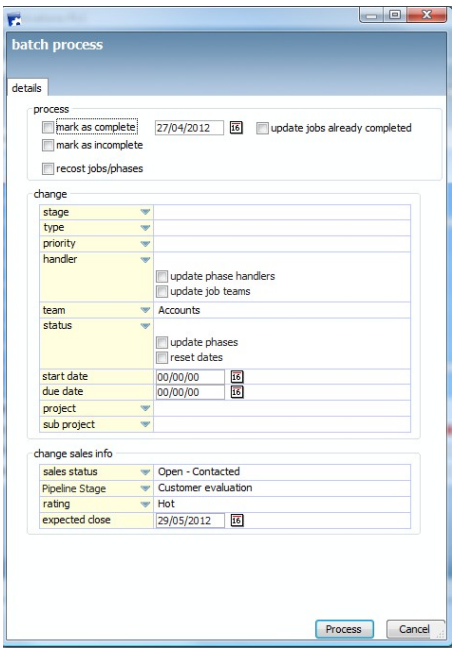


Job batch update

Enhanced features

- Team
  - Option to change the handler team allocated to the job.

- Sales info
  - Sales status
    - Note: The system will apply the business rules and only allow changes to the sales status if a job is at the correct live/quote status etc.
  - Pipeline stage.
  - Rating.
  - Expected close date.



Re-cost job feature

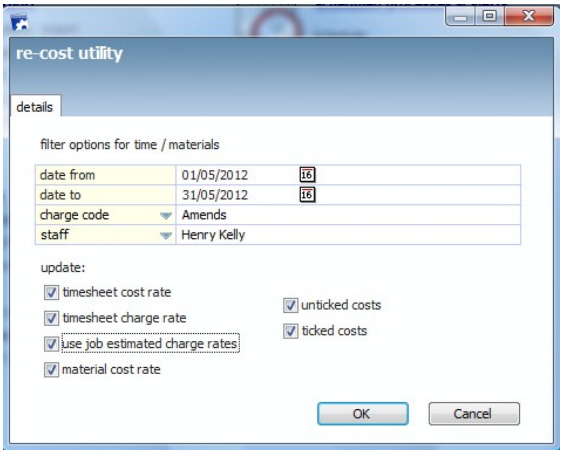
Enhancements

The re-cost jobs feature can be used to change the cost and charge rates stored against timesheets and materials posted to jobs. This feature has been enhanced:

- **Charge code**
  Option to select one or more charge codes – only time sheets of the selected charge codes are re-costed.

- **Staff**
  Option to select one or more members of staff – only timesheets of the selected staff are re-costed.

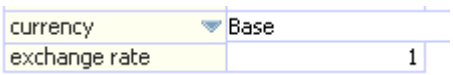
- **Use job estimated charge rate**
  Use charge rates specified in the related job estimates.



Minor changes

Currency

Base currency is now displayed as “Base” rather than <blank> - for clarity.

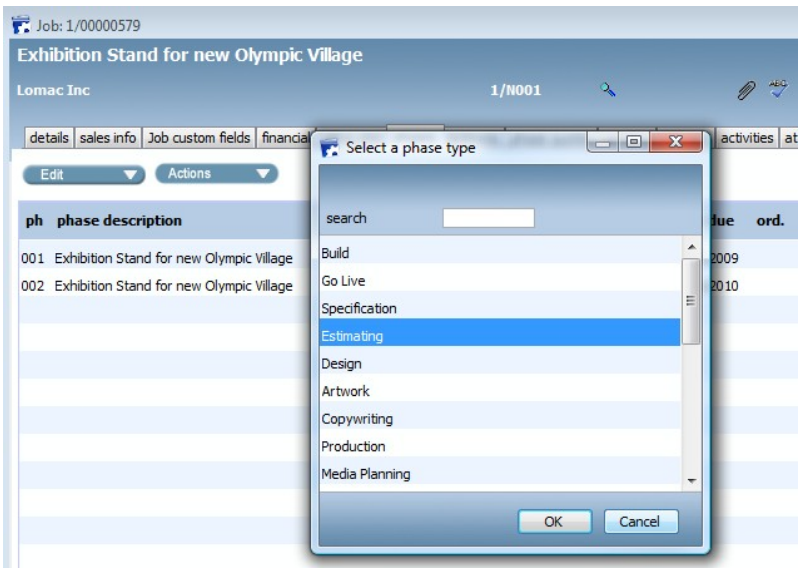


Client purchase orders (“managed clients”)

The term “client purchase order” has been changed to “client sales order” (SO’s).

Create a new phase

If you have “phase type” set as a mandatory field, but no other phase level mandatory fields, the system offers the user a list of phase types to select. Previously the system would take the user into the full phase wizard.

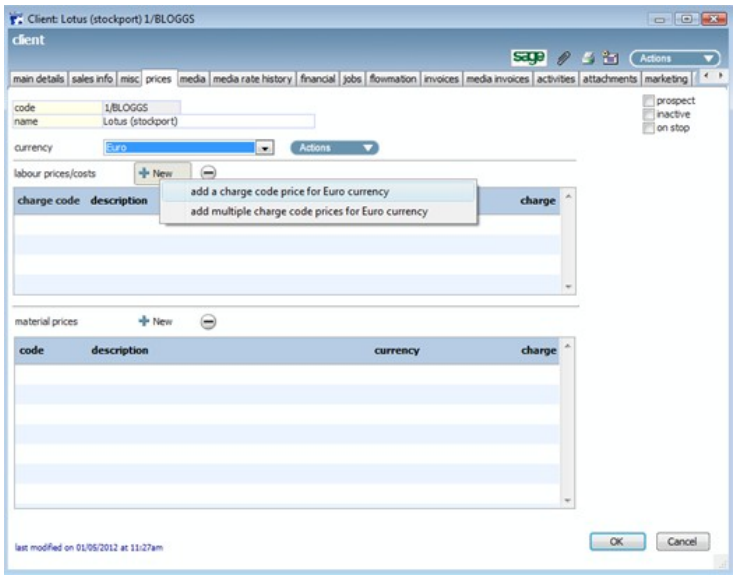


Client special prices

The client prices interface has been improved to provide a more intuitive interface when creating a group of client prices, and to allow both base currency and foreign currency prices to be displayed in a single list.

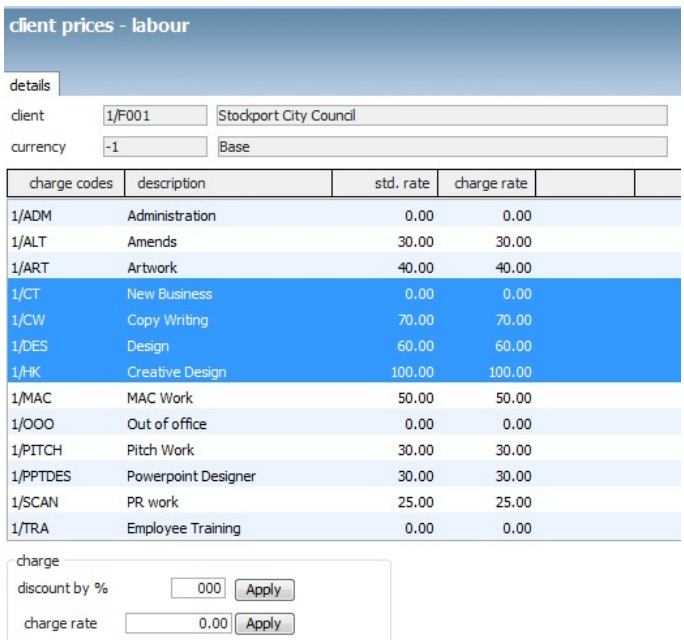
Main screen

Note: To increase the size of the area displaying labour prices/costs click and drag the horizontal line between the two tables.



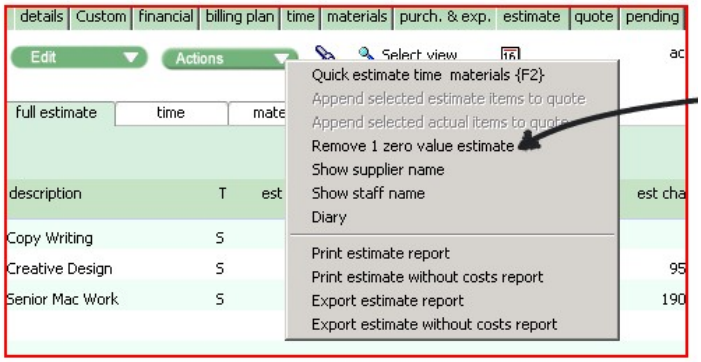
Multi-select

From here a group of prices can easily be selected and a % uplift/discount applied.



Zero value estimates

Estimates of zero value may be automatically created in Synergist in certain scenarios – including when using job templates or when booking staff into the calendar for work on a job etc. In some situations it may be permissible to remove these items – this feature allows you to do this for a number of items at once.



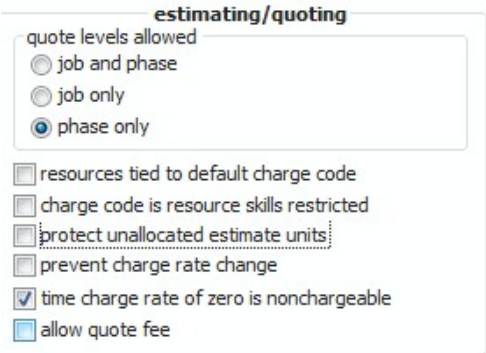
Zero value charge-rates

A setting has been added to specify whether time booked to zero value charge rates should be considered as non-chargeable.

By default, for a timesheet to be counted as non-chargeable at least one of the following must be true:

- The timesheet is on a job for a client marked as an internal client.
- The timesheet is on a phase at in-house status.
- The timesheet has been marked as investment.
- The charge rate on the timesheet is zero.

The final item on this list is now configurable:



Purchase estimate

Clients on stop

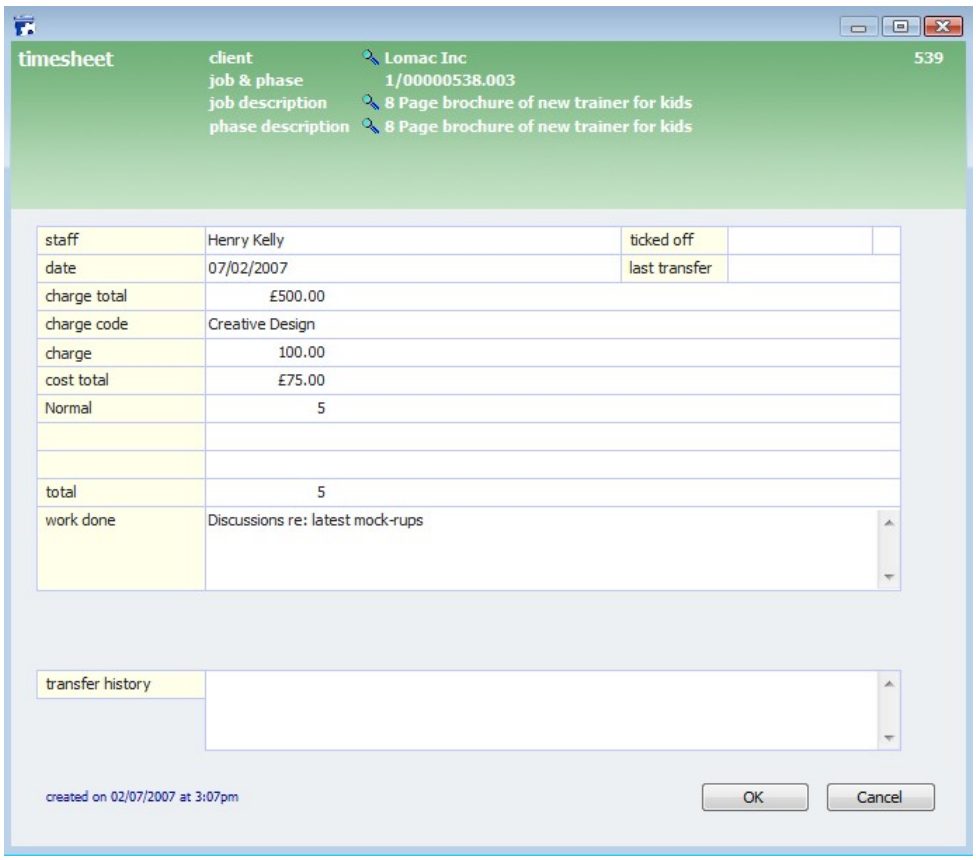
Purchase estimates can no longer be converted to real purchase orders on jobs for clients who are on stop.

TIME & MATERIALS

Editing existing timesheets

Narrative

We've added the ability to add narrative ("work done") to an existing timesheet. A useful feature if you are attaching backing sheets to invoices.



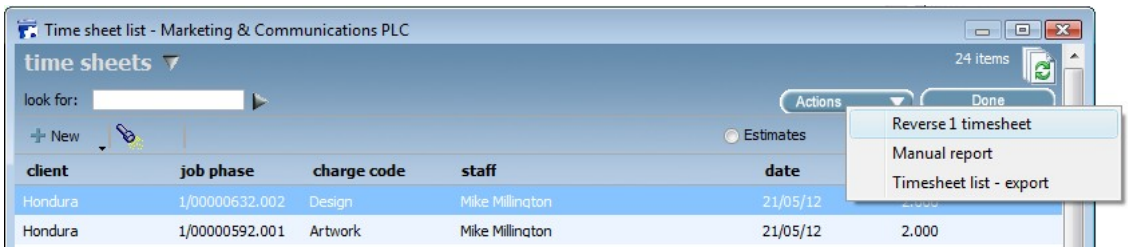
Reversing timesheets

Reversing an entry

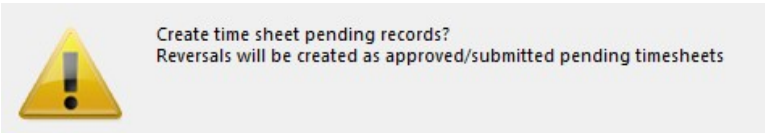
Previously the only way to reverse out a timesheet was to manually post a contra entry to the job. Now users with the required access rights (access to “job utilities”) can generate an automatic reversing transaction.

Time sheet list

First identify the timesheet(s) you wish to reverse and select them using Ctrl-Shift. Then select “Reverse x time sheets” from the actions button menu.

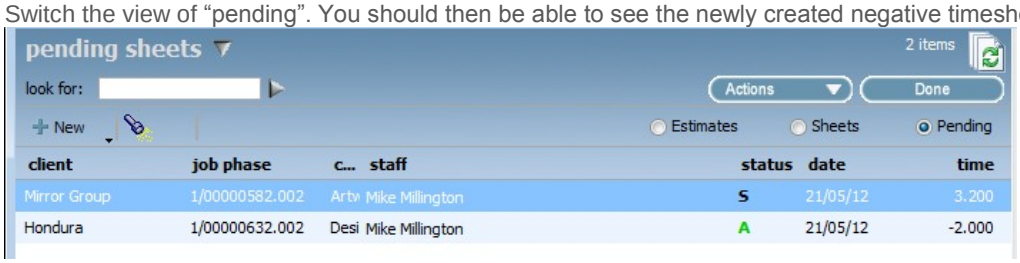


The system will tell you exactly what it is about to do – press OK.



Accessing the new reversal

Switch the view of “pending”. You should then be able to see the newly created negative timesheet entry.

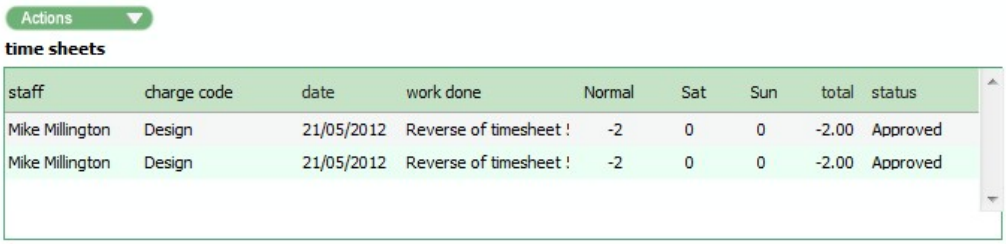


If you double click on it you can see all the relevant details. In the “work done” field it will display text with a description of how this record was created.

total	-2
work done	Reverse of timesheet 556 byMS on 05/22/12 at 10:41am

Posting the timesheet to the job

This can either be done using timesheet approval or by simply processing the approved items on the pending tab of the associated phase by clicking the actions button.



MISC

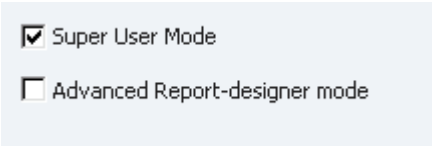
Super-user mode

Main Menu – options

Log in as “administrator”. Then from the “options” menu select “preferences”

Preferences

New option “Super user mode”

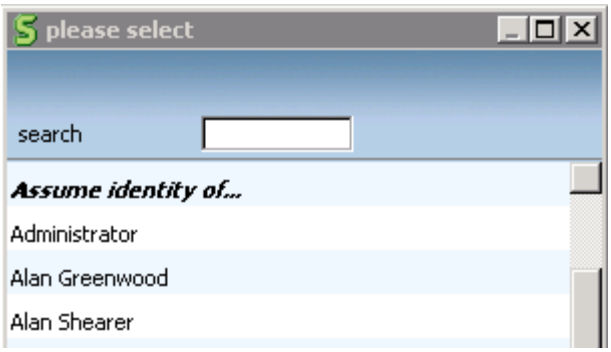


Selecting this mode enables two new features that were previously only available to Synergist project staff:

- Assume the identity
- Advanced report-design mode

Assume the identity

Once you have selected “super user mode” you will be able to temporarily assume the identity of any other user set -up in the system. This can be useful if you, as Administrator, wish to check what options are available to one of your users. Alternatively, if you need to log in as a user that has recently left the company you can. You could have done this previously by allocating a new password and logging in as that person. However, this new method is more convenient since the password can remain unknown.



Advanced report-design mode

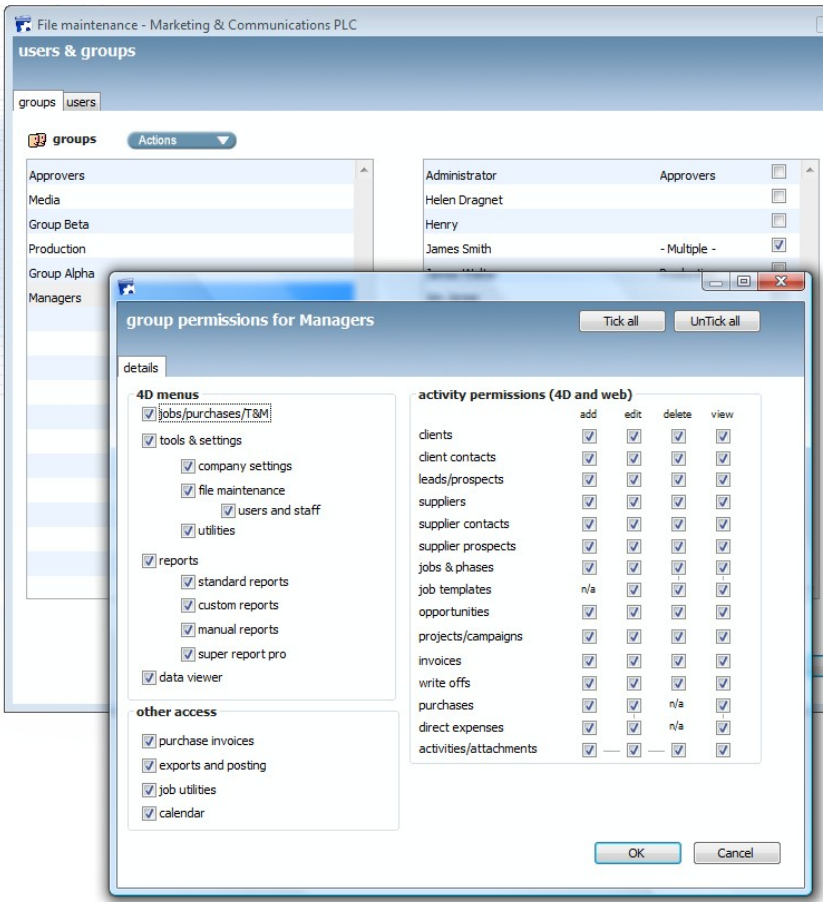
With this option selected the report designer is opened prior to bespoke reports / documents being printed. In this way you can make tweaks to layouts and immediately see the result by printing the report.

Note: These settings are not remembered. Next time you log in as administrator the settings are reset to un-checked.

Group access rights

Access rights

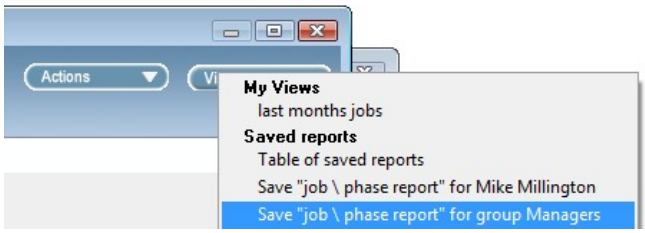
System access rights can be defined at group level as well as user level. A user can either use user level access rights OR group level (not a mixture of both).



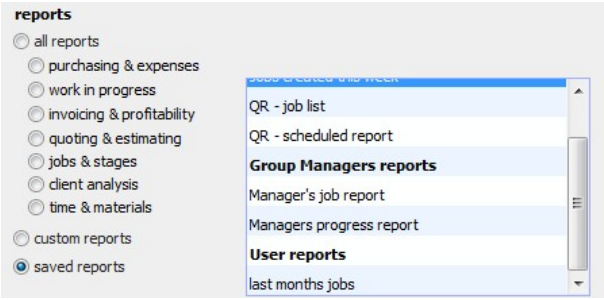
Saved reports / views

Enhanced support of groups re: saved reports & views.

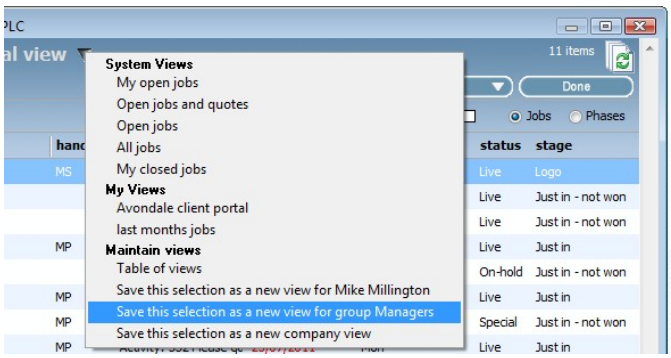
Save the report as a “saved report” for the “Manger’s” group.



Saved reports are then ordered by group, and are under a group heading.



The same principle is used for saving views (job list, client list etc.) when you wish to create a specific set of views for a group of users.

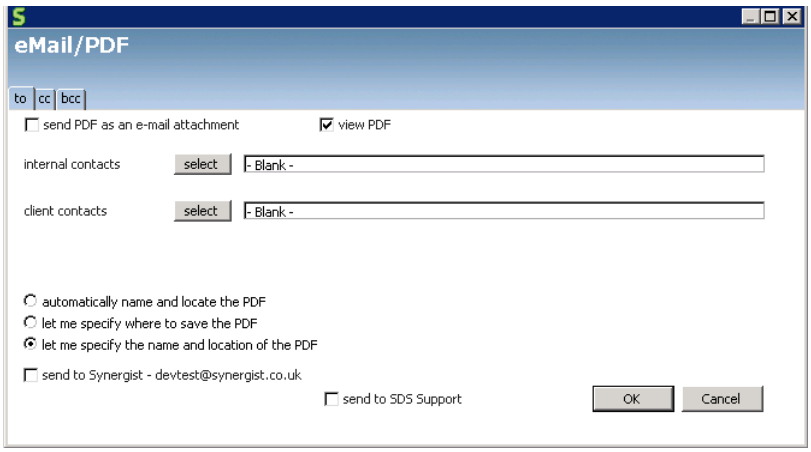


Creating PDFs from synergist

The options that are presented to the user after clicking the PDF icon are now saved back automatically to user preferences. This is particularly useful for users who routinely select the same options time and time again.

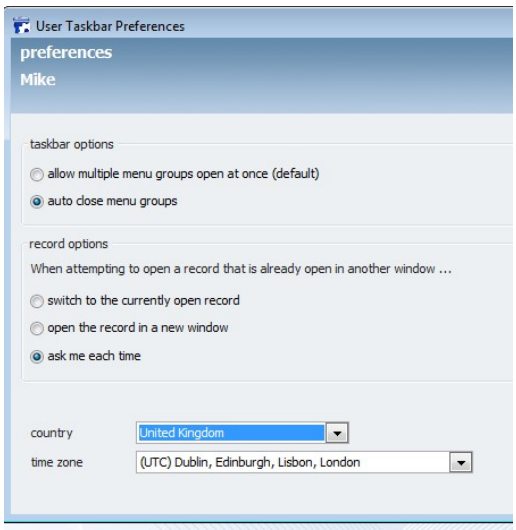
Generating a PDF

This selection of settings will automatically prompt the user for the name and location of the PDF, and then open it on his/her screen:



Record options

From the main menu “options” link users can set their preference for what actions Synergist should take when asked to open a record that is already open in another window.

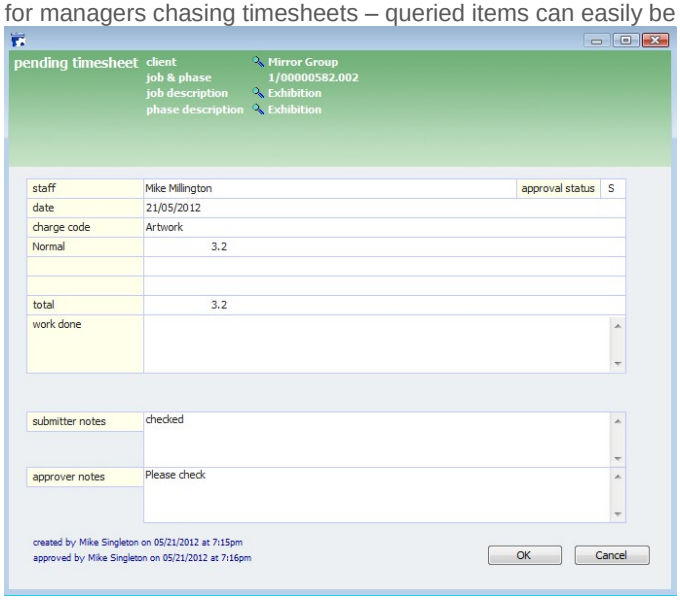


Downloading attachments

Whenever you download an attachment, be it from 4D Synergist, the Employee Portal, or the Client Portal. The downloaded attachment is now always named using the document description name, and the appropriate file name suffix added.

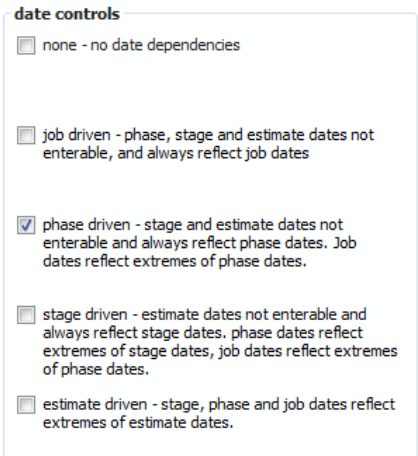
Timesheet list

When drilling down to the individual timesheet submitter and approver notes are now visible. This can be useful for managers chasing timesheets – queried items can easily be identified.



Date controls

These can be set in the company settings:



Previoulsy these settings were applied to all jobs. Now internal jobs (jobs raised on internal clients) are no longer subject to these rules / restrictions.

Alerts

Purchase invoice authorisation

An alert similar to Purchase order approval alert has been added so that, once a Purchase invoice has been approved, then the person who logged the invoice gets an alert to inform them that the purchase invoice can now be processed.

Unicode

Synergist is now Unicode compliant

"The Unicode Standard is the universal character encoding scheme for written characters and text. It defines a consistent way of encoding multilingual text that enables the exchange of text data internationally and creates the foundation for global software." *Unicode Consortium*

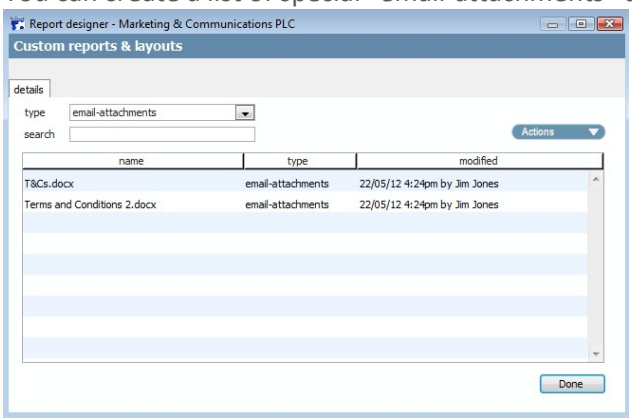
Document attachments

Special attachments

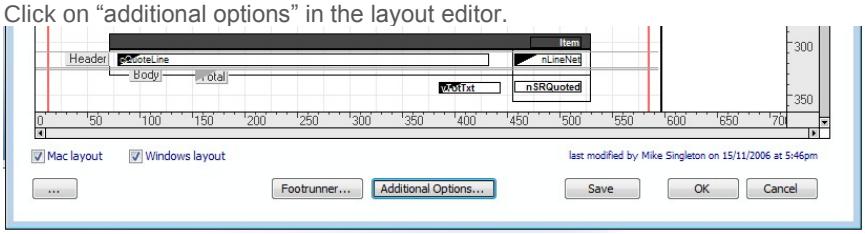
Synergist has always been able to attach external documents to emails generated when PDFing documents like invoices and quotes. We have improved the way this is managed in the "Report Designer" section.

Adding an attachment

You can create a list of special "email-attachments" that you want available to printed documents.

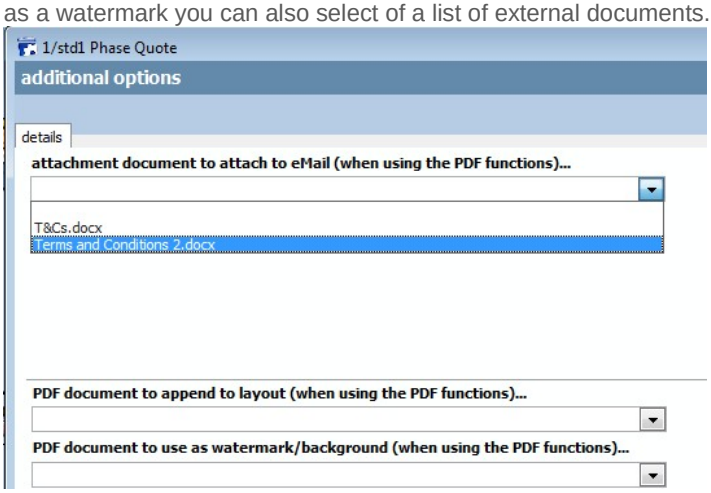


Click on "additional options" in the layout editor.



Attaching a document

You can now select an attachment in the first dropdown of the page. If you want to append PDFs or use a PDF as a watermark you can also select of a list of external documents. These are listed under "PDFs"



Upgrading

If you already have special attachments on layouts in your system you will need to click the "upgrade attachments" option on the actions button of the "Custom reports & layouts" list. You can access this from the "Report designer" option under the main menu section "Reports". This will look up any documents that you are accessing directly on your server and bring them into the Synergist database.

Accounts links

Xero

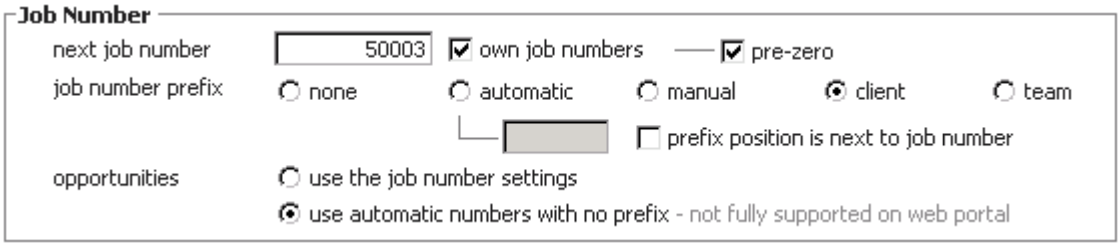
Synergist supports the posting of Sales & Purchase invoices into the cloud based accounts system Xero. Synergist can also automatically create Sales & Purchase ledger accounts in Xero at the point of posting invoices.

If you wish to use this feature please contact our support team.

Quote renumbering

Company settings – automatic opportunity numbering

Opportunities – "use automatic numbers with no prefix" – a new option (see below for details)



Job numbers – background info

You set up how you want Synergist to generate job numbers from the "codes" tab of company settings. From here you can choose which number is to be used as a starting point when creating jobs, or even elect to use manual job numbers – whereby staff will enter a job number at the point of creating a job. You can also have Synergist automatically add prefixes to job numbers.

Opportunities

Opportunities are essentially jobs that have a job status of "quote". Previously opportunities would always be given a job number in the same way that a live job would be given a job number – and that number would never change.

The current system is still in place and is the default behaviour for Synergist. However, a new feature has been added which allows you to have a simple sequential job number given to an opportunity, which is subsequently changed to a true job number if the opportunity moves from "quote" to "live" stage (i.e. it is promoted). You may want to use this new feature in one of the following scenarios:

1. You are using "own job numbers"
    a. In this scenario you may not wish to allocate a job number until job goes live.

2. You are using a "client prefix"
    a. This can be problematic if you are creating opportunities against "prospects" since the opportunity is created before the prospect has been promoted to a true client. It is normally at this point that the client prefix is agreed and entered on the system.

3. You are using a "team prefix"
    a. At the point of making a job live you may wish to decide which team the job will be allocated to.

Issues arising when using “automatic job numbers” for opportunities

You should be aware of these issues before switching on this new feature:

1. When you send a quote to client it will be using the initial opportunity number rather than the eventual job number. However, you will be able to search for the job using the original opportunity number – just put it in the search box (job list). The number appears on the quote tabs of both the job and phases (bottom of the screen).

2. At the point of making a quote live the user needs to be aware of what is required with regard to your job numbering procedure (e.g. if a manual prefix needed, or a manual job number etc.)

3. Currently the web portal does not fully support this feature. Therefore if you switch it on employee portal users will no longer be able to promote an opportunity to a live job – this will have to be done using the desktop (4d client) version of Synergist.

4. All existing opportunities are unaffected by changing the new “opportunities” settings. This should not be a problem but you need to be aware of this system behaviour.