

# synergist<sup>®</sup>

Version 12.0 - Release Notes

Synergist Desktop

**Note:** Synergist v12 requires 4D server v13

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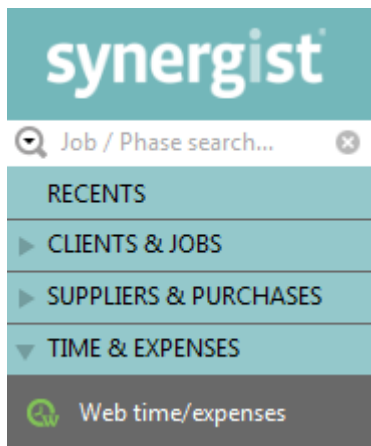
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## Synergist v12.0 release

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### Overview

The Synergist 12.0 upgrade is a major new release and introduces 'Synergist Web'. This new module can be accessed from a URL in your browser, or by clicking the link 'Web time/expenses' in the desktop application.



For information regarding Synergist Web see 'Synergist v12.0 release notes - Synergist Web.pdf'

### Synergist desktop

No major user interface changes have been made to the desktop version of Synergist.

However, the following enhancements have been made to the v12.0 version of the desktop product.

## Accounts links

### Xero accounts link

Previously all invoices / credits created by the link to Xero were always created as drafts, which needed to be approved / authorized in Xero. Xero now supports the importing of authorized (approved) invoices. Synergist now also provides this option.

## Reporting

### Time sheet list report

Time sheet list report, export version, has an additional column (when "ticked" costs selected from additional criteria) to show 'bill to client' name. 'Bill to client' is a feature in Synergist whereby an invoice can be raised against an alternative client.

### Materials report

This report now includes the "work done" field in the export - as this is sometimes used when adding materials only.

## Calendar Bookings (scheduling)

### Additional filter in scheduling module

Feature added - filter by (phase) 'handler' in unallocated estimate list.

Filters

Handler	(for filtering jobs)
Team	- All -
Handler	- All -

## Email-shots

### **This has been replaced with an Email export option**

In marketing campaigns, the "Email shot" has been renamed to Email export. Using this option the system still knows you're doing an email shot with regards to filtering contacts for opt-out and email validation purposes. However, an export is created rather than draft emails. Other than that the Email Export option operates the same way as the Export only option.

## Invoicing

### Phase allocations – advanced revenue recognition feature

A new phase allocations feature has been added to enable the moving of billed amounts in line with recognized amounts. This has been added to the auto-allocate menu for systems using 'revenue recognition'. This is available on multi-phase and multi-job RRs to create positive and negative and billed allocation amounts, whilst making no impact on deferred amounts. This is a final-invoicing feature for complex RR scenarios where money has been billed on one phase then recognized on others.

### Order number from invoice populating job order number field

Previously, if you entered the client order number into an invoice it then automatically populated an empty order number on the job/phase. A new company setting has been created to control this - on switches page, bottom right. This setting is designed to prevent the invoice order number from back-populating either the job or phase order number field.

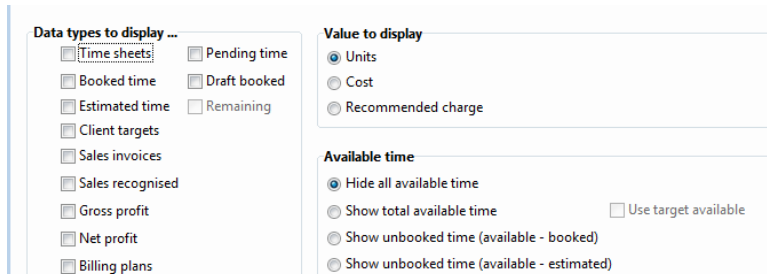
Do not transfer invoice order no. back to job or phase

## Data Viewer – major enhancements

The Data Viewer has undergone fundamental enhancements and UI improvements.

### Selecting data types

Previously Data types were chosen via a series of checkboxes:-



The screenshot shows the old interface with two main sections: "Data types to display ..." and "Value to display".

**Data types to display ...**

- Time sheets
- Pending time
- Booked time
- Draft booked
- Estimated time
- Remaining
- Client targets
- Sales invoices
- Sales recognised
- Gross profit
- Net profit
- Billing plans

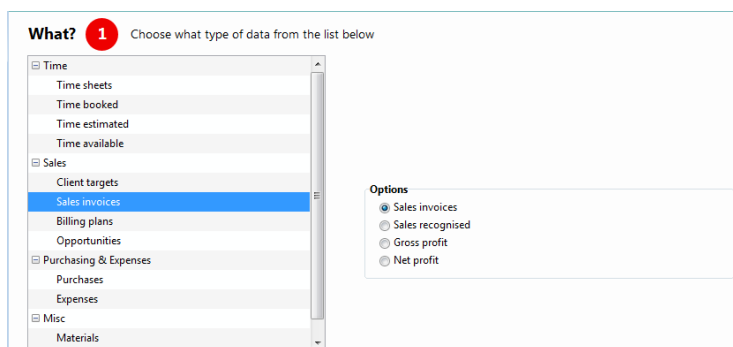
**Value to display**

- Units
- Cost
- Recommended charge

**Available time**

- Hide all available time
- Show total available time  Use target available
- Show unbooked time (available - booked)
- Show unbooked time (available - estimated)

In the new design data types are selected from a pick list. Options for data type are easily customised and the order of data types can now be specified. The same data type can be added more than once using different options.



The screenshot shows the new interface with a pick list and options for data types.

**What? 1** Choose what type of data from the list below

**Time**

- Time sheets
- Time booked
- Time estimated
- Time available

**Sales**

- Client targets
- Sales invoices**
- Billing plans
- Opportunities

**Purchasing & Expenses**

- Purchases
- Expenses

**Misc**

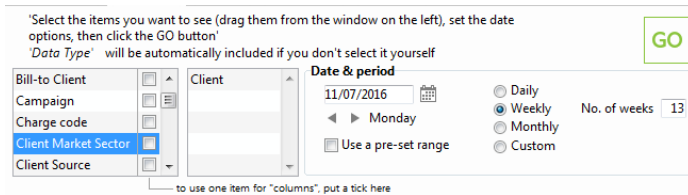
- Materials

**Options**

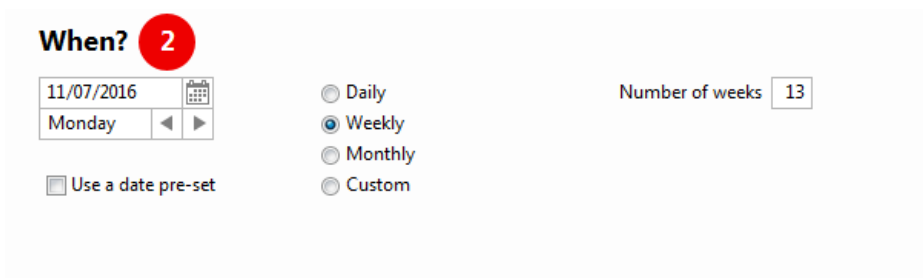
- Sales invoices
- Sales recognised
- Gross profit
- Net profit

## Multiple periods and filter selections

All data types previously used use a single (shared) set of date period settings and filter criteria:-



Now each data type entry has its own date period settings and filter criteria. This enables the user to create more complex views.





## Naming data types

Names given for data types were previously not flexible:-

Client		Jan 16
ABC Soft Drinks	Sales Billed	
Land Rover	Sales Billed	
AG Site Services	Sales Billed	
Ward Homes	Sales Billed	

We now allow each data type to be renamed as required.

**Side-benefit** – if two or more data types are renamed to be the same name, they will be consolidated into common rows. The same screen also allows the data types to be re-ordered later as needed.

EDIT	Data type	Options	Name
A	Sales Billed		Our invoicing

..

Add Remove

## Hiding the data type column

A "Data type" column was previously added for you, which you may not have needed or wanted.

Client		Jan 16
ABC Soft Drinks	Sales Billed	
Land Rover	Sales Billed	
AG Site Services	Sales Billed	
Ward Homes	Sales Billed	

Now we now provide an option to stop this from happening if required.

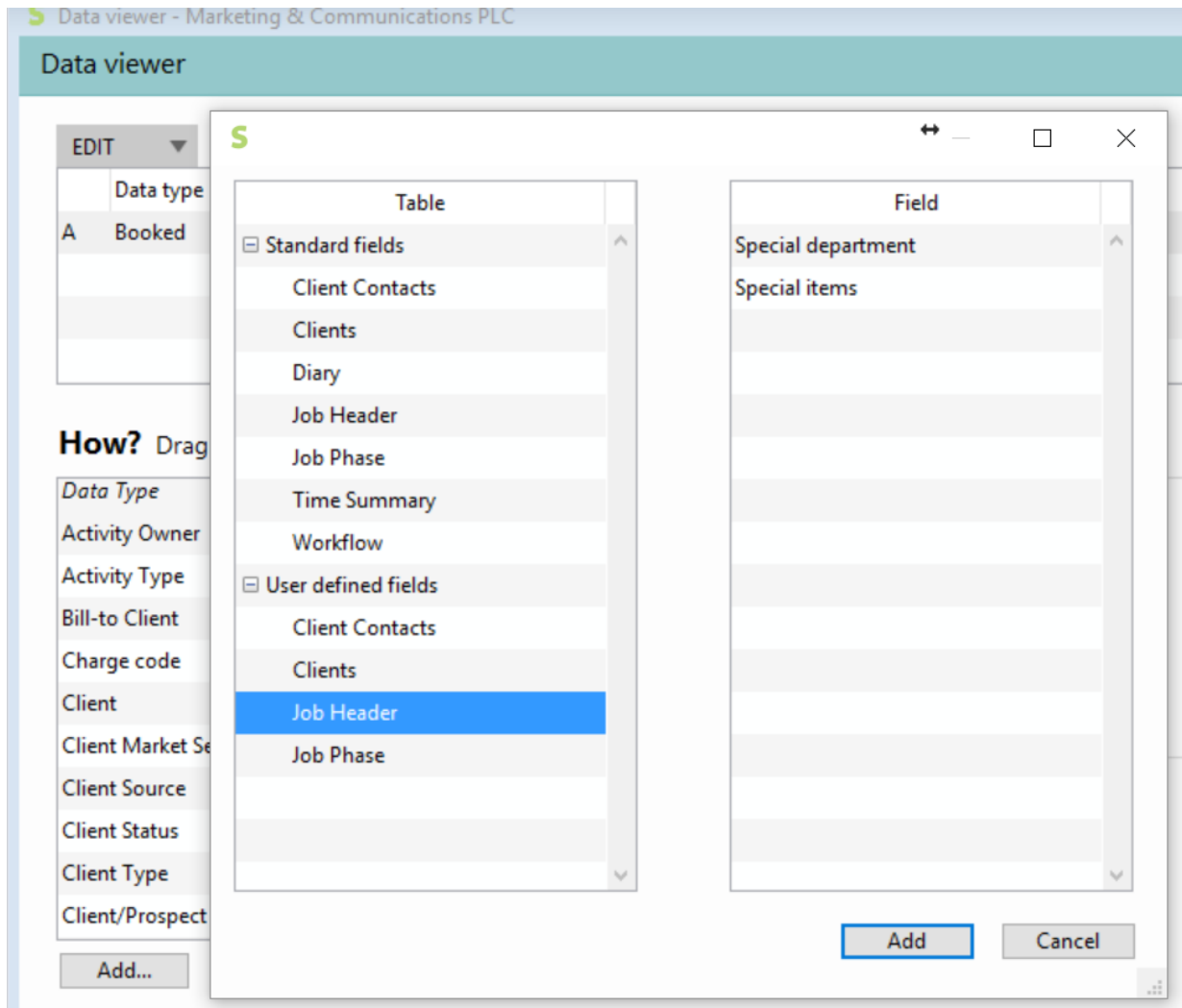
**Side benefit** – without the data type column, all data will be consolidated into common rows.

'Data Type' will be automatically included if you don't select it yourself  
If you don't want data type to be automatically included tick this box

## Extending the fields available

The cutter previously only allowed built-in choices for cutting data. Now any relevant database field can now be added to the cutter. In addition, user-defined fields can be added too.

Adding a user-defined field:



Displaying the user defined field:

Job	Special department		01/02/2017	08/02/2017	15/02/2017	22/02/2017	01/03/2017	08/03/2017
1/00000455 - Design of New Car Logo		Booked	2.50	0.50	0.00	0.00	0.00	0.00
	Department 2	Booked	0.50	0.50	0.00	0.00	0.00	0.00
1/00000580 - Exhibition Stand		Booked	14.00	0.00	0.00	0.00	0.00	0.00
	Department 2	Booked	7.00	0.00	0.00	0.00	0.00	0.00
1/00000584 - SEO		Booked	21.00	0.00	0.00	0.00	0.00	0.00
1/00000586 - Updated landing page		Booked	14.00	0.00	0.00	0.00	0.00	0.00
	Department 2	Booked	7.00	0.00	0.00	0.00	0.00	0.00
1/00000588 - HTML & CSS review		Booked	7.00	0.00	0.00	0.00	0.00	0.00

Using the same technique - by selecting the **diary status field**, you can display the booking's status - e.g. tentative / normal.

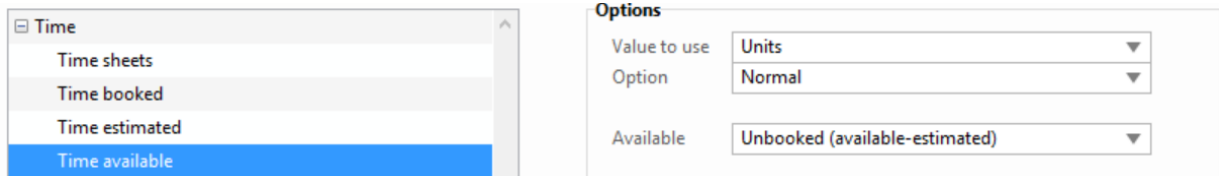
Job	Status		01/02/2017	08/02/2017	15/02/2017
1/00000455 - Design of New Car Logo		Booked	2.00	1.00	0.00
	Tentative	Booked	1.00	0.00	0.00
1/00000580 - Exhibition Stand	Normal	Booked	21.00	0.00	0.00
1/00000584 - SEO		Booked	21.00	0.00	0.00
1/00000586 - Updated landing page	Tentative	Booked	21.00	0.00	0.00
1/00000588 - HTML & CSS review		Booked	7.00	0.00	0.00

### Support 'hide costs' in data viewer

Synergist users can be restricted so that they are unable to see cost information in Synergist. If this is the case and the user has been given access to the data viewer cost information is not displayed. Recommended charge and units are still available.

### New metric for available time

Additional available time option: 'Unbooked (available - estimated)'



### Password strength

In System parameters you are now able to set up password rules. This is used to enforce security rules on any new passwords – existing passwords are unaffected.

Password rules	
Minimum length	<input type="text" value="8"/>
Minimum uppercase	<input type="text" value="1"/>
Minimum lowercase	<input type="text" value="0"/>
Minimum numeric	<input type="text" value="3"/>
Minimum punctuation	<input type="text" value="1"/>
Expiry period (days)	<input type="text" value="0"/>

If you wish to enforce the new password rules for an existing user you can force him/her to change password at next login.

Password control	
<input type="checkbox"/> User cannot change password	<input type="checkbox"/> Password never expires
<input checked="" type="checkbox"/> Change password at next login	
<input type="checkbox"/> Account disabled	
<input type="checkbox"/> Web locked out	Web login fail count 0

## Company global descriptions

In company settings – switches tab, the 'Job desc/comments' section has been re- formatted. This section enables the administrator to define which default text he/she would like to see in all new jobs. If a number of different pre-formatted job titles are required it is a better option to use job templates rather than this simple feature.

Note: Global descriptions and Global notes refer to the text entered under the defaults tab (see below). The Client spec refers to text contained in client cards.

**Job desc/comments**

- Job description defaults to global description
- Job comments defaults to global notes
- Job comments defaults to client spec
- Copy description to phase
- Copy comments to phase

## Global descriptions

Details Defaults Codes Accounts Periods Switches

Global description

Global notes

## Display current PDF writer used by 4D Server (Windows)

You can now view the current PDF writer used by 4D Server in the help > about form.

## Posting table

### Ability to mark sales / purchase invoice batches as 'posted' manually

This is a feature to help Synergist support team. It will be used where a batch of invoices needs to be removed from the unposted list (due to unhandled exception, transactions posted in error / already in Sage).

## Job folder paths

Previously these could only be entered from a client machine of the correct platform. There is now a checkbox available for manual override.

**Job folder options**

- Auto-create job folders (non-quote status jobs only)
- Job folders created by server (you will not be able to view the folders in Synergist)
- Add part of the job description to job folder path
- Enable entry of job folder paths manually

Job folder paths Win

Job folder paths Mac

## Record locking - Web v. 4D client (desktop application)

Key point about browser users – they don't "lock" records like 4D users. That means that 2 users can be in the same record, but you'll find that if one user makes a change to the record then the other user won't be able to **save** their version of it. In 4D the record would be locked and another 4D user would not be able to edit it at all.

4D = Pessimistic locking

Synergist Web = Optimistic locking

It is therefore recommended that Web users regularly save their work. If a web user leaves a record open for a long period of time after making (but not saving) changes, the chances of another user opening the same record during this period is increased. Once another user has made and saved changes to the same record, the initial user will not be able to save his/her changes.

## Synergist API

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Version 12.0 sees some additional features added to the API. This is mainly the addition of read-write access to Activity records.

For more details about the Synergist API please follow this link:

<https://apidoc.synergist.co.uk/reference>