Release notes for Synergist Cloud

Version 13: December 2024

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

synergist

[Intentionally blank page]

Contents

Quotes/Revisions

Synergist v13 includes some major improvements to the quoting system.

Basic quoting

A job or phase can have a quotation associated with it. This consists of a set of lines displayed on the quote tab. Each line has a description and a value. A quote can be printed out and sent to a customer. **No changes have been made to this aspect of the system.**

Saved revisions (15629)

For users who wish to be able to send multiple quotes to a customer, and track the changes made between each, we provide the “revisions” feature. This feature can be switched on in system parameters.

Once “revisions” is turned on, a user can still create a quote in the normal way. However, the quote can now be saved as one or more “revisions”. Each revision may have different lines and total value, and the user can select any one of the saved revisions as the current quote. Only current quotes can be printed.

This feature has been improved in this release. A quote can now **<u>only be edited if it is in “draft” state</u>**. A quote saved as a revision can no longer be amended. To amend a “saved” quote it must first be reverted to “draft” status. This is to ensure that an existing quote revision can’t be amended and sent to the customer without being saved as a new revision.

Quote approval (3014)

Quote approval is a new feature that builds on the “Revisions” concept. Not only can a quote be saved as a revision, but it can also be subject to an approval process. Instead of just saving a quote as a revision, the user selects “Submit for approval”. The quote is then saved as a revision and is placed in the state of “awaiting approval”, until a user with approval rights approves the quote revision. A quote of the state of "awaiting approval" or "approved" cannot be amended. If a user wishes to amend the quote it must first be reverted to “draft” status, edited, and the approval cycle is repeated.

Note: a non-approved quote can still be printed, However, the document has the text “DRAFT QUOTE” clearly displayed.

To enable Quote Approval:

‘Quote approval’ can be found in ‘System parameters’ in the ‘Details’ section in the ‘Settings’ tab. This can only be turned on if ‘Quote revisions’ is also turned on.

Two ‘Alerts’ have been added in ‘Company settings’ labelled, ‘Alert named approver when quote needs approving’ and ‘Alert handler when quote has been approved’.

In a selected ‘User’ in ‘File maintenance’ a section has been added called ‘Quote approval’ in the ‘Approval’ tab. These options give the user the level of approval available to them, as well as the amount they are able to approve.

‘Submit for approval’ can be selecting in the ‘Actions’ drop down within the ‘Quote’ tab. On a phase quote the table shows which phase each line is representing. When submitted the user will be prompted with a modal requesting a name for the revision and an approver, the approver will receive an alert if this option was turned on. Once a quote has been submitted for approval, the quotes tab updates to reflect this, making the quote lines read only, and showing the date and time the quote approval was requested. As well as showing the quotes current status.

Once the Quote has been set to awaiting approval two new options are added in the ‘Actions’ dropdown, ‘Revert to draft’ and ‘Approval’. When the ‘Approver’ comes to the ‘Quote’, selecting ‘Approval’ opens a modal where they can enter notes, and either approve or query the quote.

The user can revert the 'Quote' to 'Draft' to make adjustments if needed via the 'Revert to draft' option in the 'Actions' dropdown. When the 'Quote' is reverted to draft it's saved as a 'Cancelled revision'. If a user wants to make a previous 'Quote' current they can do this with the 'Revisions' option in the actions dropdown. Once a 'Quote' is 'Approved', the approver can still 'Un-approve' the quote at a later point if needed.

'Quote revision' comments to support the '#' feature (15487)

While in the comments of a 'quote revision' the '#' feature (standard paragraphs) is now supported allowing saved blocks of text to be inserted using a short code.

Quote awaiting approval tool tip (15704) v13.01

When a quote is awaiting approval, there is now a tool tip icon shown next to the wording 'Awaiting approval' which explains why the quote cannot be amended and how the quote could be amended again if required.

Resource bookings

Colours in 'Resource bookings' and 'System parameters' to reduce colour saturation (15869)

In v13 the colours in 'Resource bookings' are bolder and brighter, with the text being automatically contrasted depending on the colour selected. Dependant on the colours you've chosen, this change might not be everyone's cup of tea. So, a 'System parameter' setting has been added labelled 'Desaturate booking colours in Resource bookings / My calendar', under the 'Resource booking' title within the 'User interface' section. When selected this will make the colours show as they did in previous versions.

Requisition Owner filter in 'List preferences' (7669)

Multiple owners can be selected in the 'Owner' filter in 'List preferences' under the 'Requisition' header.

Jobs & Organisations

Revenue recognition option for job billed costs panel (3266)

If a company has 'Revenue recognition' active, the option to see the recognised billed costs is available on the dashboard tab of 'Jobs'. On the billed cost panel there is a drop down with two options, 'Invoiced' and 'Recognised'. The 'Recognised' option will show any recognised cost by updating the panel, which now has the row named 'Recognised' instead of 'Invoiced'.

Returning to the line when clicking on an estimate (3313)

When clicking on an 'Estimate' line it will open that record. When you return to the screen it will now remember where you were, instead of starting back at the top of the page.

Phase subtotals on the job estimate screen (3316)

On both single and two-tier jobs, phase subtotals are now displayed when there are two or more phases with estimates. Grand totals are shown at the bottom of the page. These will also be highlighted in a light purple.

Ability to output custom 'Revenue management' list exports on web (3534)

Revenue management now has an 'Export' button in the top right to export reports like it does on the desktop version.

'Booked hours' column added to the 'Task list' (8289)

'Booked hours' column is available in the column picker on the 'Task list'. Please note this column is not sortable.

Company settings supported in ‘Quick billing plan’ (8392)
When creating a ‘Billing plan’ via the ‘Quick billing plan’ function, the new billing plan created will adhere to the options set in ‘Company settings’ the user is in.

Added ‘Delivery date’ via user defined fields to ‘Purchase orders’ (8695)
An ‘Expected delivery date’ field has been added to the ‘Delivery’ tab on the ‘Purchase orders’ page. By creating custom/user-defined fields the filtering of data from the purchase order list is now possible.

‘Estimate to actual’ panel in Job/Phase dashboard renaming (8945)
Within the Job/Phase dashboards, the 'Actual to estimated' panel has been relabelled 'Estimated to actual'. The left-hand column in the table displays the estimate values and the right-hand column displays the actual values.

Invoice lists display the paid status from accounts packages (9516)
The 'Paid status' column on the 'Invoice list', 'Draft invoice list' and 'Purchase invoice list' display the paid status from the following accounts packages:

- Microsoft Dynamics 365 Business Central
- QuickBooks/Intuit
- Sage Business Cloud Accounting
- Xero

The statuses are:

- Paid
- Part-paid
- Unknown

Invoices with a status of 'Paid', 'Part-paid' or 'Unknown' have a tooltip containing additional information.

Default ‘Views’ with multiple ‘User groups’
Previously if a user belonged to 2 user groups (both groups set to allow saving views) and you had a view saved as 'default' in one of these user groups, then this saved default was ignored and the company default view was used instead. Now Synergist will use the view that has been saved as the default, regardless of how many user groups the user belongs to.

Ability to filter by stage (9693)
Filter options have been added to the list filter that allows users to filter by stage, this has been added to the ‘More filters’ area under ‘Stages’. It is a multiple option filter.

‘New’ button in ‘Materials’ tab to allow actual materials entered outside of daily timesheets (9750)
In the ‘Materials’ tab in job, phase and stage records, the ‘New’ button has been added to allow materials to be entered outside of ‘Daily timesheets’.

Tasks ordered by start date on Gantt charts (9781)
‘Gantt’ charts in the selected job phases tab now have their tasks arranged by the task start date instead of the creation date.

Show different bill-to client name on list of invoices for a job/phase if job client has been changed (9891)
If a ‘Job’ or’ Phase’ changes client ownership, any pre-existing ‘Invoices’ in the Invoices list for that Job or Phase will automatically be set to 'Bill-to' in the previous client's name.

‘Client turnover’ added as a selectable column (10038)
In the column picker ‘Client turnover’ has been added as a selectable column on the ‘Organisation list’.

Client List Targets - Month and year added to 'This financial year' and 'Last financial year' column headers (10303)

When 'Start of year' is set to 'Financial year', and the 'Company setting' for 'Financial year start' is set to January, the column headers ('This financial year' and 'Last financial year') only include the year.

When 'Start of year' is set to 'Financial year', and the Company setting for 'Financial year start' is set to any month bar January, the column headers ('This financial year' and 'Last financial year') include both the month and year.

When 'Start of year' is set to 'Calendar year', the column headers ('This financial year' and 'Last financial year') only include the year.

Please note that 'Start of year' (Financial year / Calendar year) can be set in the 'Preferences', 'Targets' section within the 'Organisation list'.

'Kanban status' added to 'Batch create tasks' (10409)

When batch creating 'Tasks' from the main 'Jobs list' or main 'Phases list' the 'Kanban status' field is available. Please note the default value for the 'Kanban status' field is controlled within the 'Kanban statuses' list within File Maintenance.

New Deferred column on invoice tabs for Job and Phase (10489)

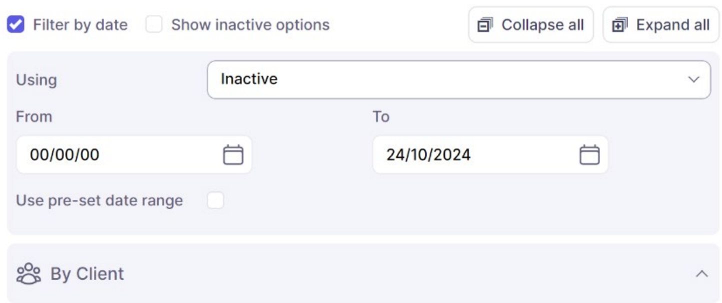
When there is a 'Recognised' amount on an 'Invoice', a new 'Deferred' column will be shown on the 'Invoice' tab of 'Jobs' and 'Phases'. This column automatically calculates the differences between the 'Amount' and the 'Recognised' columns.

Enhance client contact filter on jobs & phases to include job/phase contacts (10795)

When filtering using 'Client contact' it will now filter within the 'Job' and 'Phase' where the client contact is present as a record in the 'Contacts' tab. Previously it only filtered based on the 'Client contact' allocated in the 'Details' tab.

'Inactive' filter added in 'Organisations' (12017)

In the filter on the 'Organisations list' the option 'Inactive' can now be selected from the 'Using' dropdown when 'Filter by date' is selected (image below). Ensure 'Status' in the 'By client' section is also marked as 'Inactive' for the filter to work. This adds the ability to have a filter for Clients that were marked as inactive in a specific date range.



Stages 'Comment' field length increased (12569)

The 'Comment' field within the 'Details' section of a selected 'Stage' has been increased to 70 characters from the previous limit of 25 characters.

'Quote detail' column added on 'Stages list' (12710)

When in the 'Stages list' a new selectable column has been added into the column picker labelled 'Quote detail'.

Currency symbol showing against all costs/charges on job/phase estimate (12927)
When within a job or phase record that uses a currency which differs from the base currency on the estimate tab, the currency symbol will now show for base and foreign currency for the 'Costs' and 'Charges'.

'Confirmed' column added to 'Resource booking' tab in a selected 'Task' (13057)
The 'Confirmed' column within the 'Resource booking' tab in a selected 'Task' will show a tick if that line has been confirmed.

'Client handler' Added as selectable column in 'Job' and 'Phase' lists (13542)
A new item has been added to the column picker in the 'Jobs list' and 'Phases list' labelled 'Organisation handler'.
Please note, when added this column will show up with no label header, but this can be expanded to show this. From the column picker 'Organisation handler' is located from Jobs under the available columns section when viewing the jobs list and Phases if viewing the Phases list.

'Weighting' checkbox and '% Weighted' field on billing plan lines (13564)
The changes on each billing plan line are:

- The addition of a 'Weighting' checkbox
- The 'Weighting %' field being editable

Both are only editable when the 'Weighted values' switch, located above the table, is turned 'Off'.

'Actual to estimate hours' added in the 'Percent filter' on the 'Jobs list' (14237)
On the 'Jobs list' the additional filter has been added labelled 'Actual to estimate hours'. This is in the 'Percent filter' drop down under the section 'By job/phase'.

Opportunity list views changes (14914)
Below are some changes to the 'System views' in the 'Opportunity list'

- 'All opportunities' – Exclude jobs with live/inhouse/on hold/special status. This will only display opportunities with a 'Quote' status.
- 'Opportunities opened this week' – changes so the preset date uses 'This week' and not 'From tomorrow'.

Import from CSV for 'Purchase invoice/orders' (14747)
A button labelled 'Import from file' has been added on the 'Accounts link' screen under 'Import purchases/expenses'. This is used to import/upload files which will be validated. Any errors found will be shown as an alert to enable them to be corrected. A sample import file containing instructions can be downloaded.

'Recognised to Recommended charge' and 'Recognised to Estimated charge' thermometers (14027)
Two new thermometers have been added into the 'Job' and 'Phase' list column picker labelled 'Recognised to Recommended charge' and 'Recognised to Estimated charge'. These will also be on the 'Job dashboard' if 'Revenue recognition' is turned on.

Column for 'Terms' in 'Organisations' displays the description rather than the number (15804)
To make it easier to differentiate between payment Terms that have the same number of days, the 'Description' of the term will now be shown in the table rather than the number of days.

'Job time tab' change default 'date to use' in the filter to the 'Timesheet' date (16112)
Within a selected job > time tab > filter > tick date has been changed to now use the 'Timesheet' date like the 'Timesheet list report' does.

Exclude 'Phase' and 'Stage' types from the 'Gantt' (15839)
The option 'Exclude from Gantt' has been added under a selected 'Job types' or 'Phase types' under the 'Types' section within 'File maintenance'. This will exclude the checked type from the 'Gantt chart' when ticked.

Client Targets have a thousand separator option (10240) v13.01
In the preferences for Client targets an option for 'Thousand separator' has been added. This option is on by default but can be toggled off.

Increase to Market sector character limit (16619) v13.01
When creating a new 'Market sector' the character limit has increased from 30 to 80 characters.

'Charge code type' added as a filter when add a new client price (16364) v13.01
When adding a new client price the filter 'Charge code type' will now be available to use and be the first option shown to filter by.

Roles and functions are available in the column picker (16363) v13.01
From the client and supplier contacts main lists the field 'Roles/functions' can now be added as a column when using the column picker. This will show as '-Multiple-' if a contact has several functions selected.

Job number can be used in the invoice list search (16188) v13.01
You can now use the job number to help with searching for invoices from the invoice list.

Job Time tab – default change to the filter by date (16112) v13.01
From a job going to the timesheet tab and using the filter, if filtering by date the default option is now 'Dated'. Previously this was 'Posted'.

General

Notification centre (13192)
The new 'Notification centre' is accessed by clicking on the bell in the top right corner. The number of total unread notifications will also show on the bell to make it easy to see when something needs attention. When opened it displays a list of Notifications, with the unread ones first and then a few read ones below these. There is a button at the top to 'Mark all as read' or a 'Mark as read' button is present on each notification. The notifications currently display the 'Alerts' selected from 'Company settings' where previously it would just generate an email.

Auto totalling for all base currency and hours columns selected from the column picker (7966)
Automatic totals have been added for columns chosen in the column picker containing values of base currency or hours. This applies to all the main lists containing the column picker. Totals will show at the bottom of the list in light purple.

Multi-factor Authentication Process Updated (9000)
When generating a multi-factor authentication code, instructions have been added to the panel when the "Authenticator App" option is selected. A 'Completed' button has also been added for users once the multi-factor authentication has been set up.

Add Activity ID on History Alerts / emails mentions
When a user is mentioned in a comment on an 'Activity', the user will receive an email. The email now contains the 'Activity Id', which is also a hyperlink to the Activity.

Remove 'Fax' fields (10352)
Fax input fields have now been removed from Synergist.

Preset date range - additional options (12768)
Wherever pre-set date ranges can be used an additional 2 pre-set date ranges have been added. These are ‘From 2 weeks ago’ and ‘From a month ago’.

Fields added in ‘Document template’ (13583)
The following options have now been added into the ‘Document template’:
- Client handler name
- Client contact’s direct and secondary phone number
- Job team description

Search filter allows for multiple word search terms (16900) v13.01
You can now add multiple word search terms to help filter to a more specific set of results. You can also use operators to further help in your search. Operators that can be used are, ‘And’, ‘Or’ and ‘Not’.

‘Date In’ renamed to ‘Start date’ (13550) v13.01
From the column picker ‘Date In’ has been renamed to ‘Start date’

Report

Estimate vs actual report option changes (8729)
The relationship between the following two fields under ‘Options’ has been changed so that only one option or no options can be selected:
- One record per client
- Only show summaries that are over budget by at least…

‘Cost of sales reconciliation’ export report added to web (9614)
This reports the detail of purchase accruals, purchase WIP and purchase invoice detail vs period gross profit. The export is available in Reports/exports. Once selected, enter/change the dates for the report as required. It will then export a file in the same manner as the ‘Cost of sales Reconciliation’ report that was available in the desktop interface.

Job type and phase type added as columns on the export version of ‘profit by invoice’ report (11304) v13.01
The profit by invoice report now contains new columns labelled 'Job type' and 'Phase type' in the export.

Renaming of ‘Timesheets – by day’ report (13274) v13.01
The ‘Timesheets – by day’ report has been renamed to ‘Timesheets - by day/week/month’.

Settings

'Overtime options' added to batch updating users in File maintenance (9587)
In the ‘Update selected users’ pop-up screen, selected from the action bar when multiple users are selected. A new option has been added labelled ‘Overtime options’. This allows overtime options which are set in ‘Company settings’ to be applied to multiple users at once. Once set this shows up in the ‘Access’ tab in a selected user under ‘Miscellaneous access’.

'Allow None' option removed from Lookups/custom fields (9643)
With the removal of the 'Allow None' option from the lookups/custom area, the dropdowns no longer allow there to be no options selected and they now have '-blank-' as the top available option.

‘Order approval (Purchase approval)’ and ‘Direct expenses always invoice received’ made mutually exclusive (3579)

From the switches tab in company settings, the following options are now mutually exclusive: ‘Order approval (Purchase approval)’ and ‘Direct expenses always invoice received’. You can now no longer have both options switched on at the same time.

Option to delete handler targets when disabling a user account (10165)

When disabling a user account with handler targets, an option now exists to delete the users' targets. In the 'Handler targets list', a 'Users' filter has been added with options to view active and inactive users. Set the 'Users' filter to 'Inactive' to view a disabled user account. If 'User access' is also unticked, the user record will not be displayed in the inactive list (User record > 'Set up' tab > Select company).

Charge code/client rate card restrictions (9350)

Charge codes now have the option to restrict their use to only be used when set as a client price. This option can be activated or deactivated via a checkbox in the Charge codes details section of File maintenance.

In ‘File maintenance’ select ‘Charge codes’ from the ‘Time & materials’ section, then select a charge code. In the ‘Details’ tab selecting 'Charge code can only be used when set as a client price' will enforce the rule and that charge code will no longer appear as an option for users unless it's in conjunction with setting a client price.

Display ‘Licenses’ on the ‘User list’ (10391)

A new column 'Licenses' has been added as the last column in the ‘Users list’, This shows which licenses the users have allocated to them. In the case that a user is allocated more than one licence, it will display 'Multiple' in the table. In the event a user does not have a license, the license column will be blank.

Singapore added as a ‘Default country’

Singapore has now been added as an additional ‘Default country’ option on a company.

Enable of batch updating for client restrictions (14011)

Batch update feature has been added for ‘Client restricted’ in the ‘Restricted’ section within ‘Users’.

Hide export options from all main lists with batch update added (14782)

New user setting added labelled ‘Disable list exports’ in the ‘Access’ tab within ‘Users’. This can also be selected within user batch update. When selected it will remove the ‘Export’ button from all main lists for that user.

Screen for Email issues added in ‘Utilities’

To enable the investigation of email delivery issues, an ‘Email issues’ feature has now been added to the ‘Utilities’ section. This displays any email delivery issues allowing drilldown into the details.

‘Do not transfer PDF attachments for sales invoice’ company setting added (15689)

New company setting ‘Do not transfer PDF attachments for sales invoice’. When set the system doesn't attempt to transfer sales invoice PDFs to destination accounting systems Xero, QuickBooks Online and Sage Business Cloud Accounting.

User list export for approval & delegation data (15982)

An export has been added to the user list to export all the relevant information about Time & Expense sheet posting, including managed by, delegation, and approval levels.

New user access setting to hide financial data but allow Time estimates only (16060)

From the Access tab (user account) when the option ‘Hide financial data’ is set the user can now access the estimate tab on a job or phase. The user will only see the estimated values of time, materials and purchases. No monetary values are shown. The user will also be able to use the quick estimate button to add estimated time or materials. Alternatively, they can use the ‘New’ button to add estimated time or materials.

Company setting for Import from Xero - reimbursable and non-reimbursable (5093)

New company setting under the 'Accounts details' tab labelled 'Bank transaction statuses to import'. The default setting is blank (i.e. no importing of bank transactions from Xero - current behaviour). Options available in new company setting are 'UNRECONCILED' and 'RECONCILED'. The same button that imports purchase invoices/credits now also imports bank transactions if the new company setting is populated with 'RECONCILED', 'UNRECONCILED' or both options

New user preference for thousand separator (16144) v13.01

From the user preference section there is new dropdown menu labelled 'Thousand separator' which allows for choosing a different separator character. The options available are, 'Comma', 'Space' and 'None'.

Time & Expenses

Block self-approval in 'Timesheet approval' hides own 'Timesheets' (9773)

If the user you are logged in as is set to block self-approval of timesheets, then your user's timesheets will not be included in the list of timesheets in timesheet approval.

Unpost a 'Posted timesheet'

Ability to 'Unpost' a 'Posted timesheet' has been added. Select a timesheet from the list and within the action bar the 'Unpost' button will be there. Please note, the user can only see this option if they have 'Timesheet deletion' setting set in their 'User' record within 'File maintenance'.

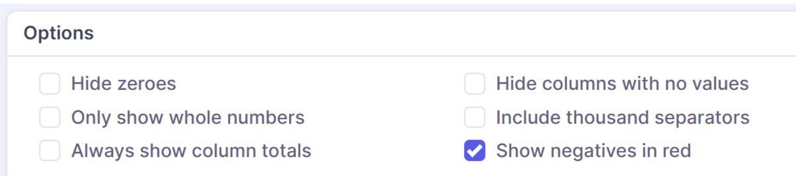
Expense line description – Expense type (14881)

When creating an expense line the description section now no longer auto populates with the expense type.

Data Analytics

Data analytics negatives to display in red (10359)

To display negative values in red, tick the checkbox 'Show negatives in red' - located in the 'Options' panel (shown below). Click 'Create table' and the table now displays negative values in red. If this is not set negatives will remain the normal text colour in the table.

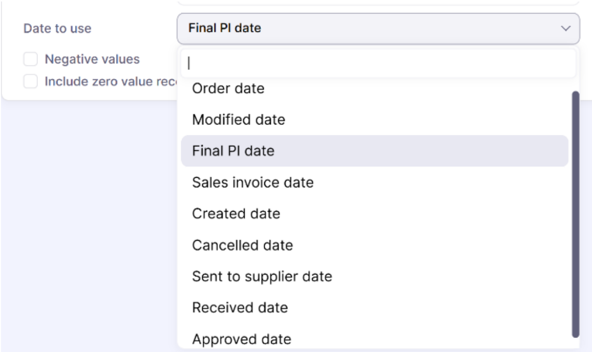


'Data analytics' 'Ticked costs' enhancement (10418)

Reporting using the following data types; 'Purchases', 'Timesheets', 'Expenses', and 'Materials' can now all be driven by the associated sales invoice 'Tick off date' as an additional option to the standard 'Transaction date'. This makes it possible to run period-based reports and the details of costs along with GP. This is assuming those costs are ticked off within the invoicing period.

Report on timesheet overtime (13187)
Overtime options can now be selected and reported on in 'Timesheet' reporting. The wording of the options will be based on what has been set in 'Company Settings' on the 'Timesheet' tab. These options will only show in the 'Data analytics' screen if overtime options are selected in company settings.

Extra 'Date to use' options added for 'Purchase' data types (13910)
When selecting the data type 'Purchases' in the 'Data analytics' screen, there are now several new options to choose from in the 'Date to use' drop down (shown below).



Added reporting for Timesheets (16192)
The option has been added into 'Data analytics' to report on 'Unsubmitted time' to allow more options for reporting on 'Timesheets'.

Data Analytics can now show % of total in a calculation (10078)
From the 'Add calc' button you can now add a new calculation type which can be used to show a % of total in a calculation.
e.g. A/#A*100 will show the percentage of the current row value of A vs the total column value for data entity A.

The tool tip has been enhanced to show an example of this calculation entry. When using a calculation the 'Data type' will need to be included as a column.

Invoicing

Filter invoices by paid status (10554)
A filter option has been added to 'Invoices' and 'Purchase invoices' allowing the user to filter 'Invoices' by their paid status, the options are 'Paid', 'Part-Paid', 'Unknown' and '-Blank-'.

Sort invoices by paid status (10557)
Column picker gives the option of adding the 'Paid status' column to the table, the table can then be sorted by the 'Paid status' column. If there is no 'Account link' then there is no option to add the 'Paid status' column.

Separate nominal postings on invoices/credits for header analysis entries (14896)
A new company setting has been added labelled 'Separate nominal postings on invoices for analysis entries'. When enabled the 'Invoice detail lines' will create postings for the accounting system but they will all use a single fixed nominal 'Suspense' account. A set of nominal journal postings will also be created to move the value from the 'Suspense' account into the required nominal breakdown from the header analysis.

Currency invoices have a currency switch (16937) v13.01

For currency invoices there is now a switch to show either the base currency, foreign currency or both. This is shown on the 'Details tab' of the invoice.

Suppliers

Consolidated purchase orders - 'Approve/Unapproved' button removed (10149)

'Purchase orders' on a consolidated purchase order can only be approved/unapproved via the 'Actions' button on the consolidated purchase order. They cannot be approved/unapproved via each individual purchase order.

Selecting multiple 'Supply types' at a time on a 'Supplier' (10448)

You can now select multiple 'Supply types' when adding them to a 'Supplier' via the 'Supply type' tab.

Link supplier tab added (10627)

A 'Link supplier' option has been added in the 'Linked suppliers' tab within a selected 'Supplier'. When a link is added it will be shown in a table with the option to remove the link at the end of each row.

With a linked supplier, if a 'Purchase order' is created against it and then a 'Purchase invoice' created against the 'Parent supplier', all linked 'Supplier purchase orders' will show for allocation to the 'Purchase invoice' as well as the 'Parent supplier purchase orders'.

Purchase order list filter – 'Purchase cost is within user's approval range' (10752)

A new filter added in the 'By purchase' section of the 'Purchase list' filter screen labelled 'Purchase cost is within user's approval range'. This is so users can only see 'Purchase orders' up to their 'Approval limit'. Please note: If 'PO approval' is on and if the current user is not a 'PO approver', then no purchase orders will show if the filter is selected.

'Phase type description' and 'Phase type code' selectable column in 'Purchase order list' (13909)

In the 'Purchase order list' two columns have been added in the column picker labelled 'Phase type description' and 'Phase type code'.

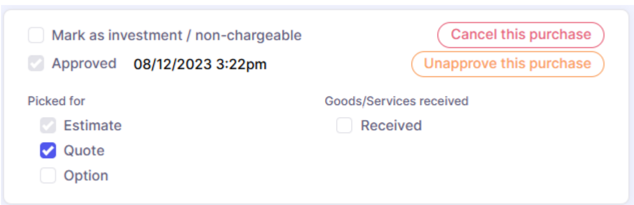
'Unallocate all' button in 'Purchase invoice' (14788)

In a selected or new 'Purchase invoice', a new button has been added labelled 'Unallocate all' above the unallocated purchase order list. This is a quick way to unallocate all instead of using the 'Unallocate' button which is currently present on each row in the table. When clicked a confirmation dialogue appears.

Mark real 'Purchase order' as 'Goods/services received' from supplier (13293)

To enable this a new 'Company setting' has been added labelled 'Received option for POs' located under the 'Purchasing' header within the 'Switches tab'.

The option to set the 'Purchase order' as 'Received' is in the 'Details' tab on a selected 'Purchase' and is to the right under the option header 'Goods/services received' (shown below). Once marked as received it can then be allocated to an incoming 'Purchase invoice'.



Purchase order receive improvements from above addition (13293)
A couple of improvements were added for when 'Received option for PO lines' is selected. 'Time received' and 'User' shown on a tooltip when hovering over the received date. Please note, the 'Received date' is only shown for a 'Purchase order' line when the line has been marked as 'Received'.

Requisition based purchase orders can be unapproved (17015) v13.01
When a purchase requisition has been created, once it has been submitted for approval and approved, it can then be unapproved if required. Previously this was not possible.

Currency purchases have a currency switch (17055) v13.01
For currency purchases there is now a switch to show either the base currency, foreign currency or both. This is located on the 'Lines' tab of the PO.

Purchase order requisitions (13292) v13.01
You can now create a purchase order without having a PO number automatically allocated to it. This can be achieved by switching on 'Requisition approval' from the 'Purchasing' section' in company settings from the 'Switches' tab. Once this is switched on, when a purchase requisition is submitted for approval, it will only be allocated a PO number once the PO has been approved.

Accounts

Expenses import – option to bypass (Purchase) expense approval process (13045) v13.01
Imported expenses can now have the expense approval process bypassed. This is supported with various accounting packages and is also supported via the 'Import from file' option. This feature is switched on in company settings from the 'Accounts' tab and the checkbox to switch it on is labelled 'Process and post imported expenses'.

Sage Intacct integration via API (13432) v13.01
Synergist now supports using Sage Intacct integration via API

Xero Scheduler paid status improvements (10289) v13.01
When the online paid status scheduler runs, the response can now handle more than 100 invoices. This means the returning information of the paid status from Xero accounts will show more accurately for the larger invoice batches.

Accounts link Generic export option allows nominal journals for RR (10972) v13.01
When using the Generic export option for the accounts link, it now allows nominal journals for RR (revenue recognition transactions). The 'Nominal journals' option will be shown in the accounts link section. When a nominal journals batch is posted a file is produced for download, this has a new column shown in the Generic export for Handler which is based on the phase or job handler as appropriate to the invoice.

Dashboards

Tasks shown in the 'Calendar summary' section within 'Personal' dashboard (13470)
When a 'Task' is set to show on the calendar it will also now show on the 'Calendar summary' panel within the 'Personal' dashboard. This will show the tasks you have been assigned to.

Renaming

Everywhere

Staff	to Resource/Resources
Billing/Billed/Bill	to Invoice/Invoiced/Invoice
Requisitions	to Work requests
Gross margin	to Gross profit
Net margin	to Net profit

Main menu

Activities	to Tasks
Scheduling	to Schedule
Calendar bookings	to Resource bookings
Standard reports	to Key reports
Data viewer	to Data analytics
My tasks	to My work
Clients	to Organisations
Client & jobs	to Jobs & orgs
Suppliers & purchases	to Suppliers

Dashboards

Dashboard	to Dashboards
Scheduling	to Capacity
Data viewer	to Data analytics
Billing forecast	to Invoice forecast
Targets & jobs	to Targets
Average spend by sector	to Average spend

Standard reports

Future POs	to Future PI
Purchase invoice awaited	to Purchase accruals
Timesheets – by day	to Timesheets - by day/week/month

Jobs & organisations

Billed costs	to Allocated costs
Unbilled costs	to Unallocated costs
Schedule tab	to Stages tab
Notional costs	to Planned costs
Expected	to Expected close
Price tab	to Rate card tab
Add time special price	to Add client rate (same with materials)
Deaden this opportunity	to Close opportunity
Prove opportunity costs	to Refresh costs
Re-cost this opportunity	to Re-estimate with latest rates

Client/contact record

Removed fax record
Removed home phone record
Add Instagram and TikTok
Renamed Twitter to X

[End of Document]