synergist®

Version 12.2 - Release Notes

Synergist Desktop Interface

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Contents

Synergist v12.2 release (desktop version)

Overview

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

Technical Requirements

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

Synergist v12.2 has the following minimum system requirements:

Server:

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

Desktop:

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

Accounts links

Kashflow integration

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

Comments/history - alerts

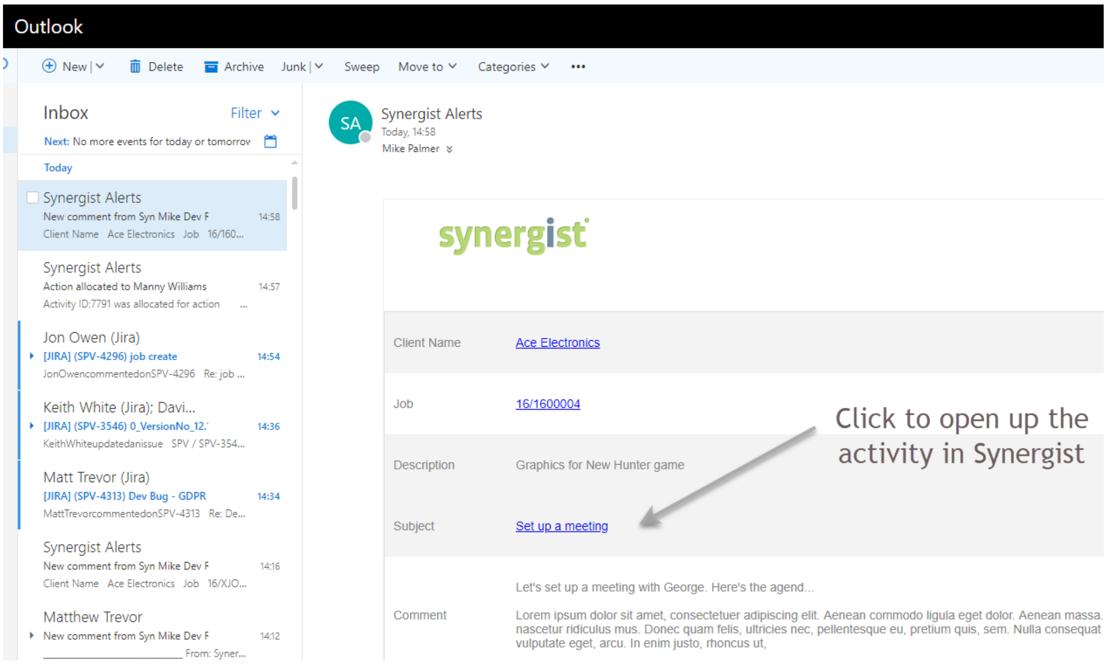
If the 'immediate alert' flag is set on an activity, any comments added to the activity will send Synergist alerts to the activity owner and secondary owners (called 'others').

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

Email alert

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

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



Billing plan report/export

Additional column added for recognized value.

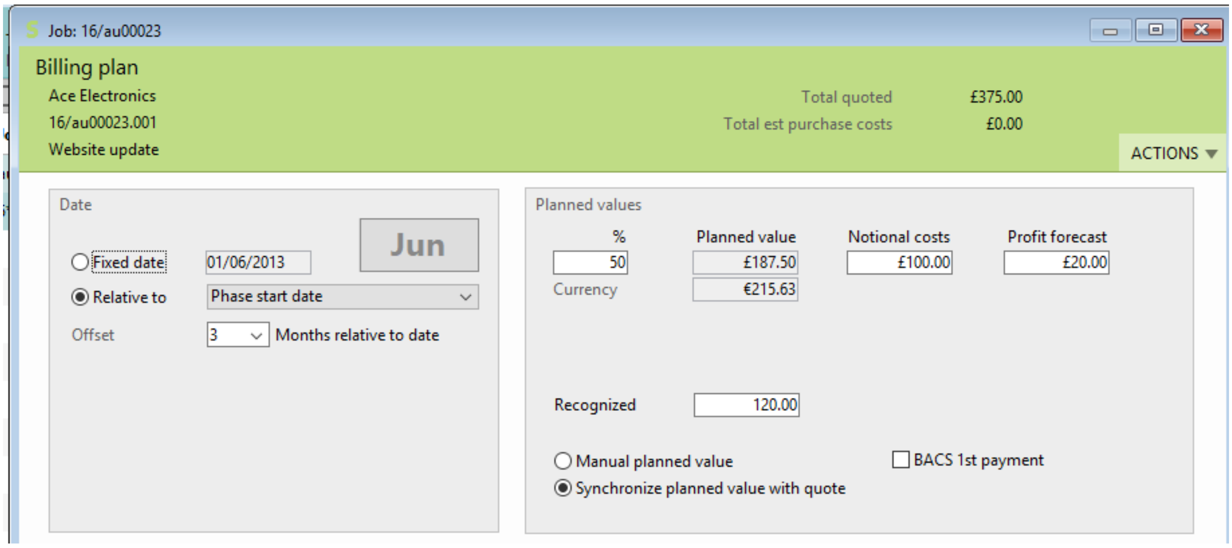
Revenue recognition

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

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

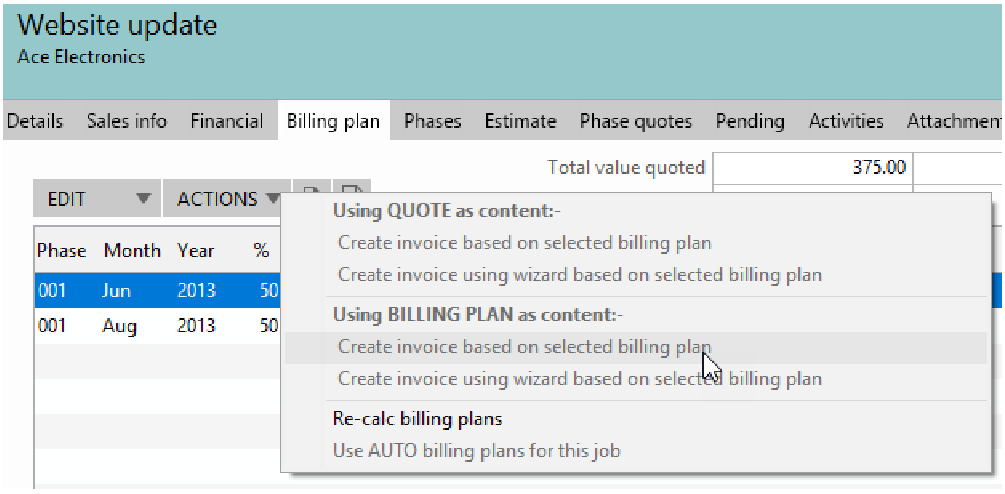
Billing plan item

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



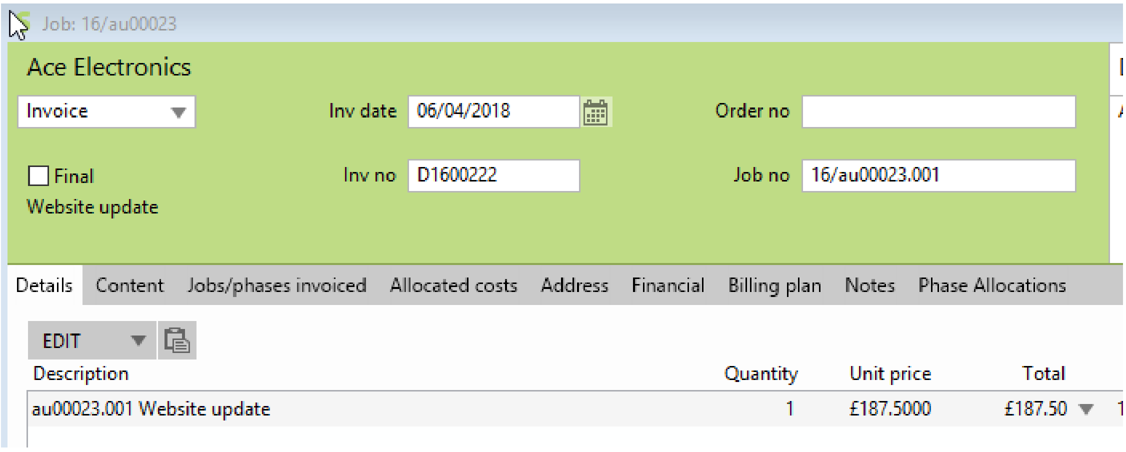
Invoicing the billing plan

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



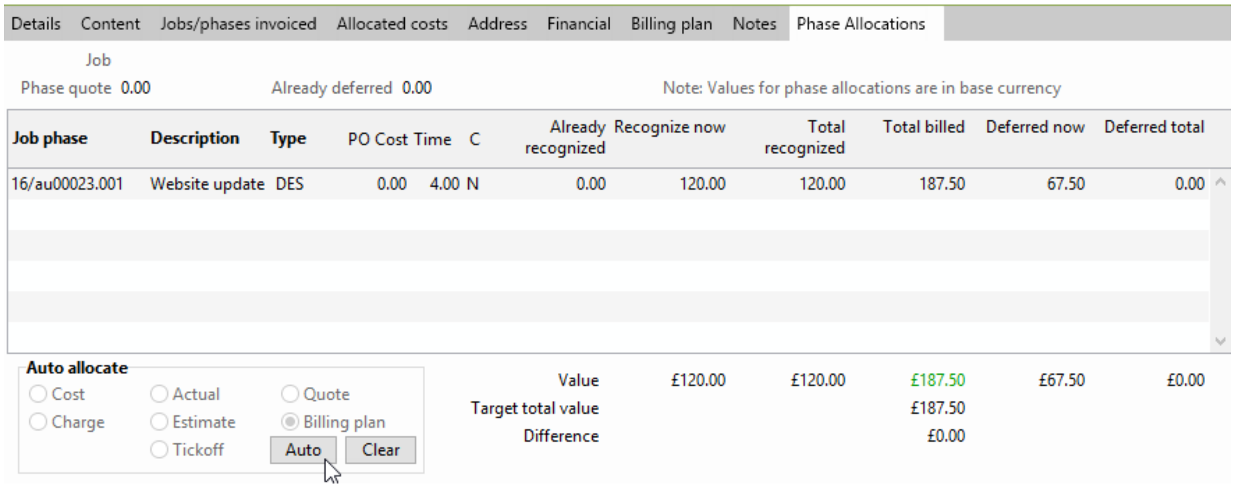
Invoice generated from billing plan

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



Deferring income

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



Clients & Contacts: GDPR

GDPR – General Data Protection Regulation

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

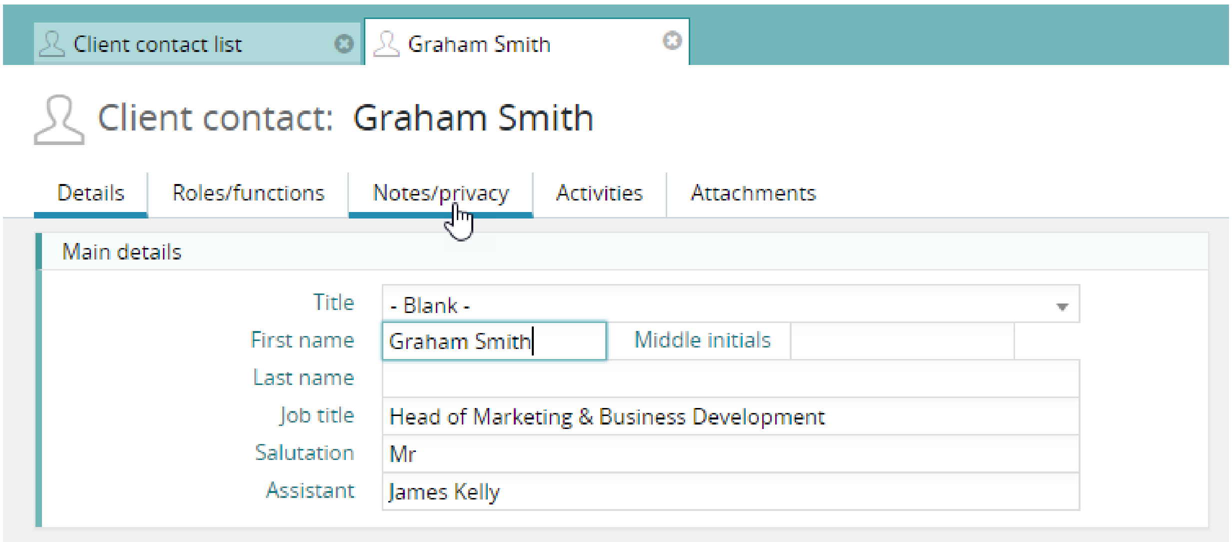
The new features affect the client contacts area where you may be holding data that needs reviewing to ensure compliance with the new rules. The key to this ensuring you can record whether a contact has explicitly 'opted in' to communications with your company, when this opt-in authority was obtained,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

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

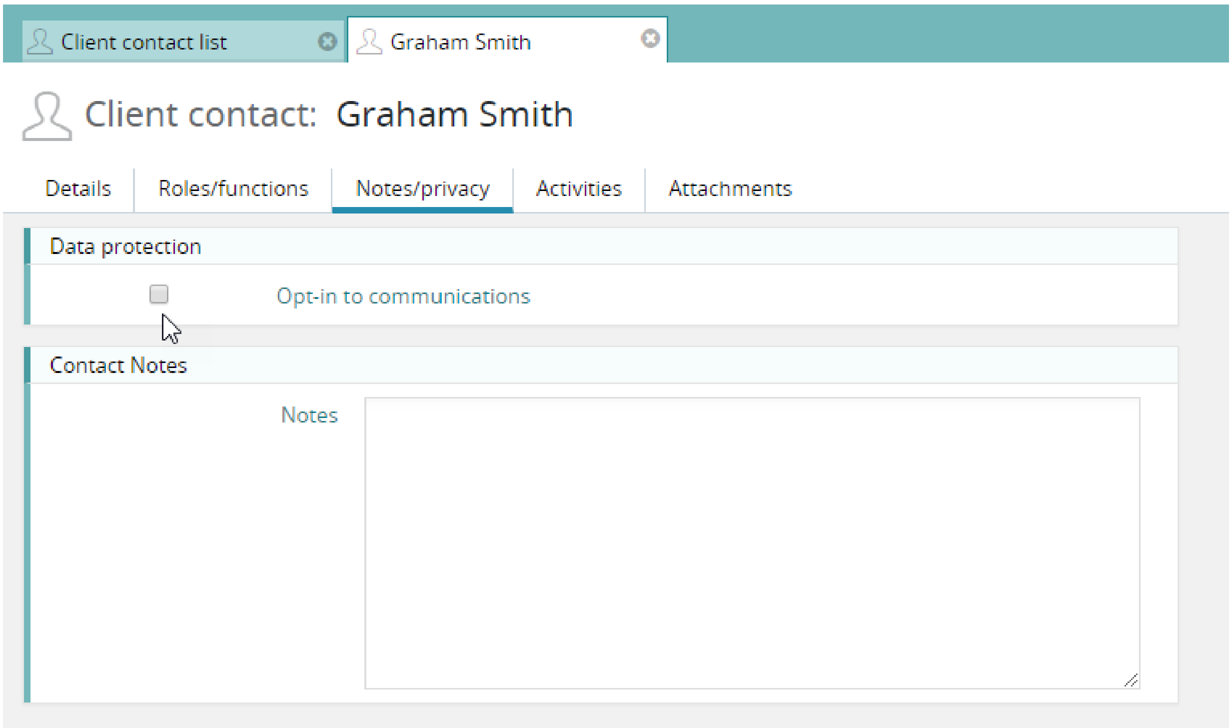
Since it would be very time consuming to set these new fields manually we have also added features for enhanced querying of the data (including selecting a batch of contacts by pasting in a list of email address, and new batch update features

The client contact record

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



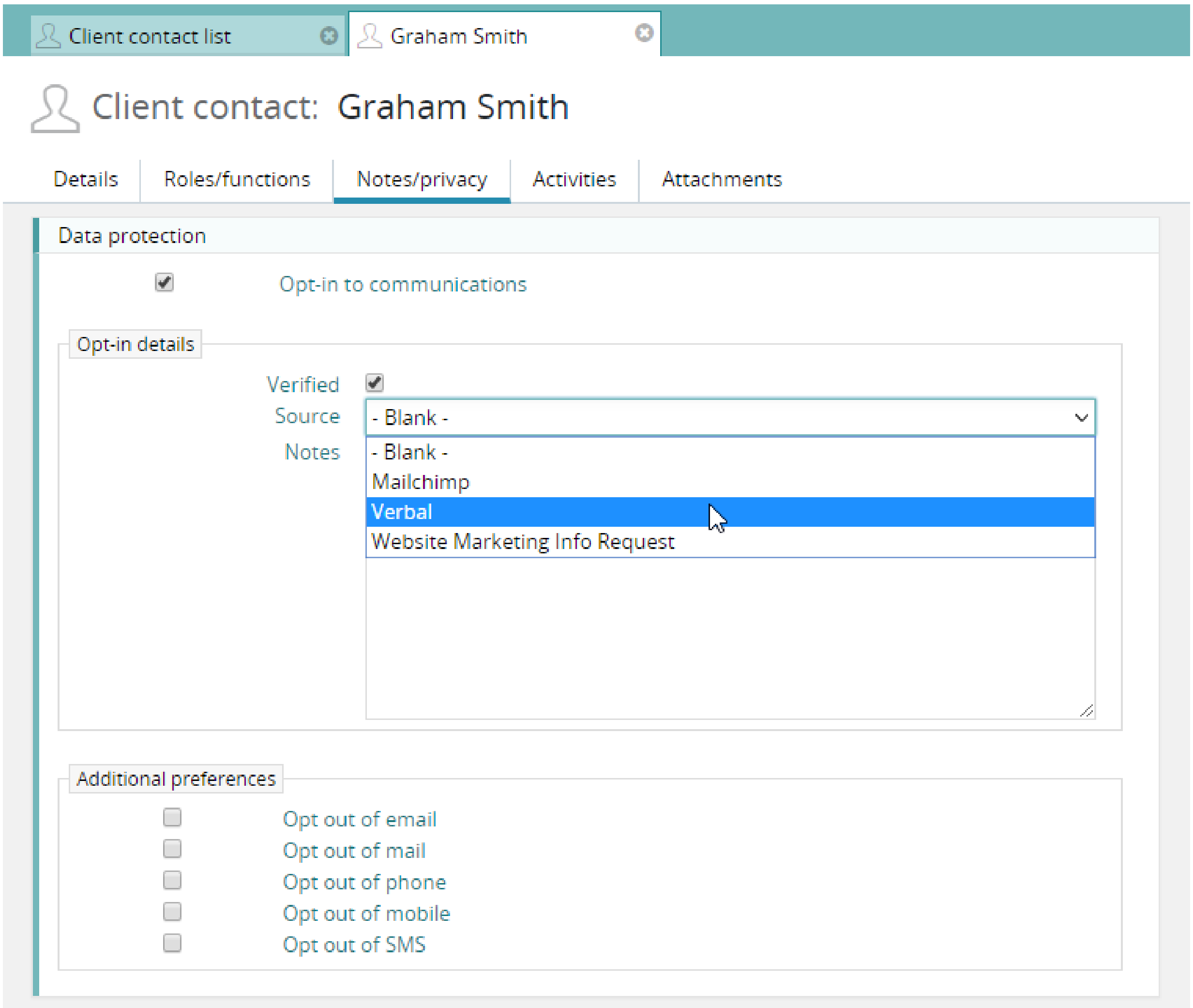
The Notes/privacy tab



Opted-in status

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

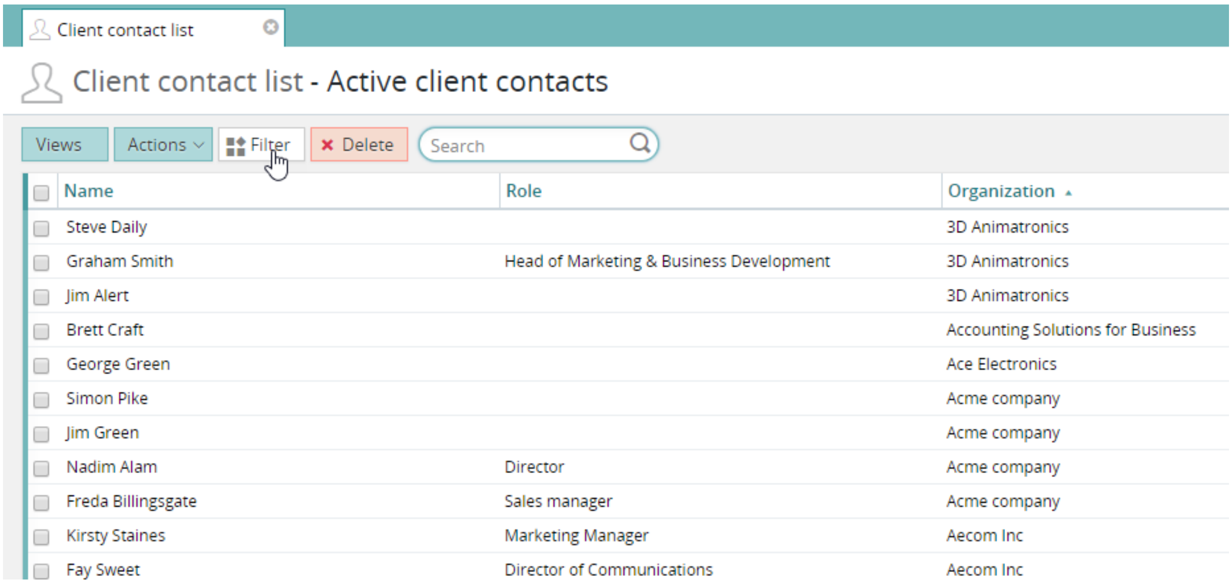
- Verified
  - Indicates that you have verified the opt-in status
  - The system will also record the date it was verified and by who
- Source
  - Where the source of the verification was obtained
- Notes
  - Additional notes. Useful if verbal authority was obtained
- Additional preferences
  - Your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



Batch updating

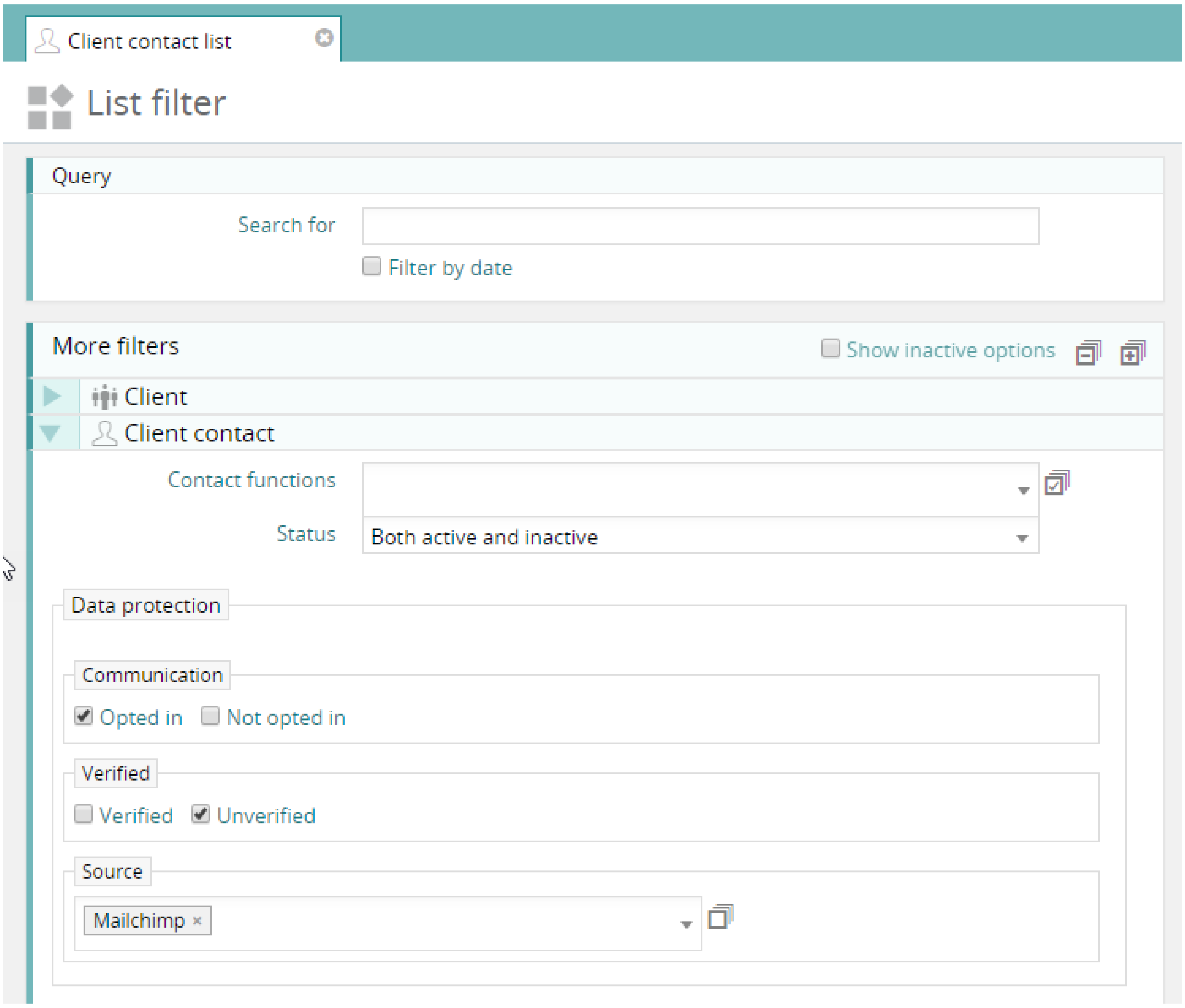
Rather than editing each contact separately, you will probably wish to select a group of contacts and set their privacy settings using batch processing.

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

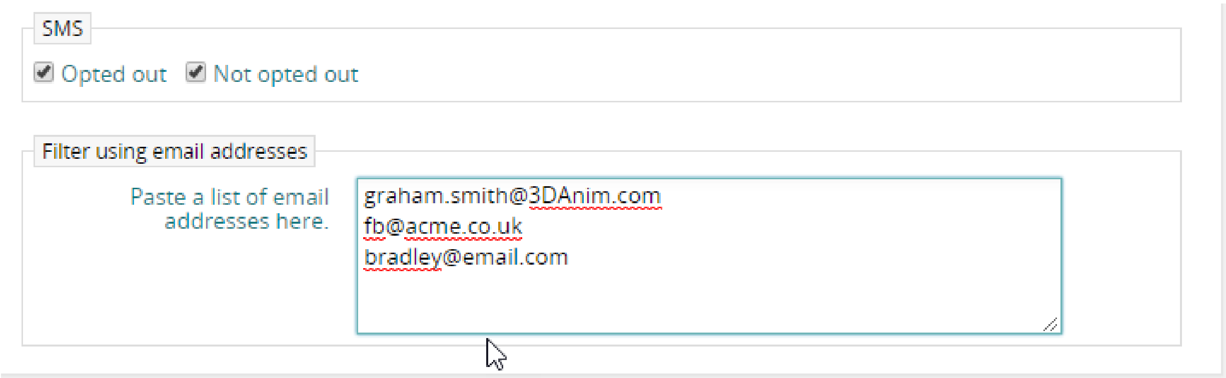


Using the filter

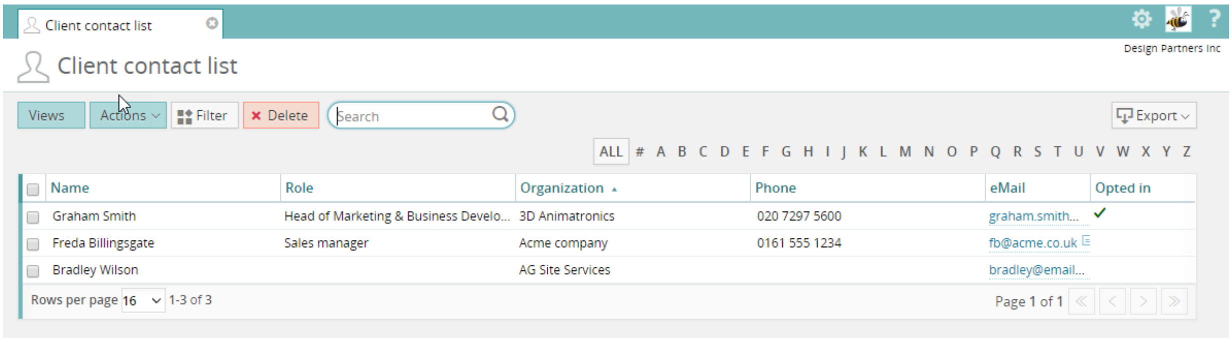
By using the filter, you can select a specific group of contacts. In this example, all contacts would be selected where 'opted-in' has been set but they have not been 'verified'.



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

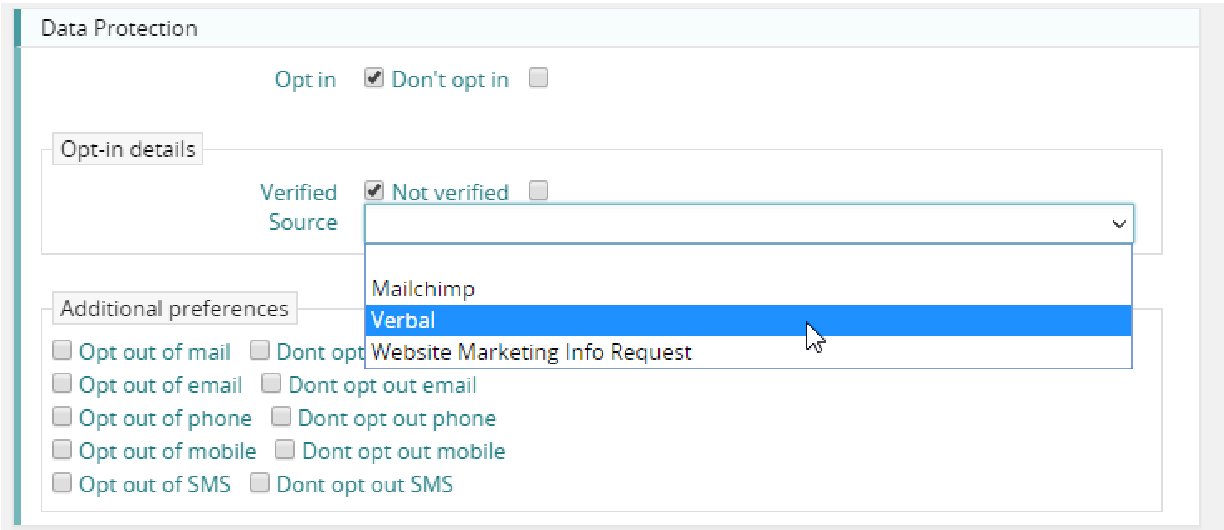


On clicking 'Apply filter', the selection of contacts is now reduced to the contacts on the system that have the email addresses pasted into the filter.



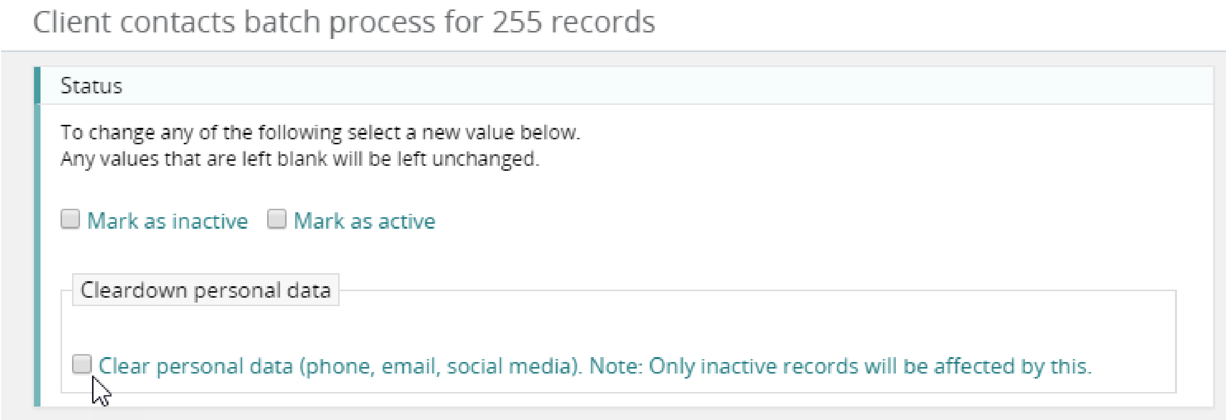
Selecting the changes you wish to apply

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



Clearing down old data

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

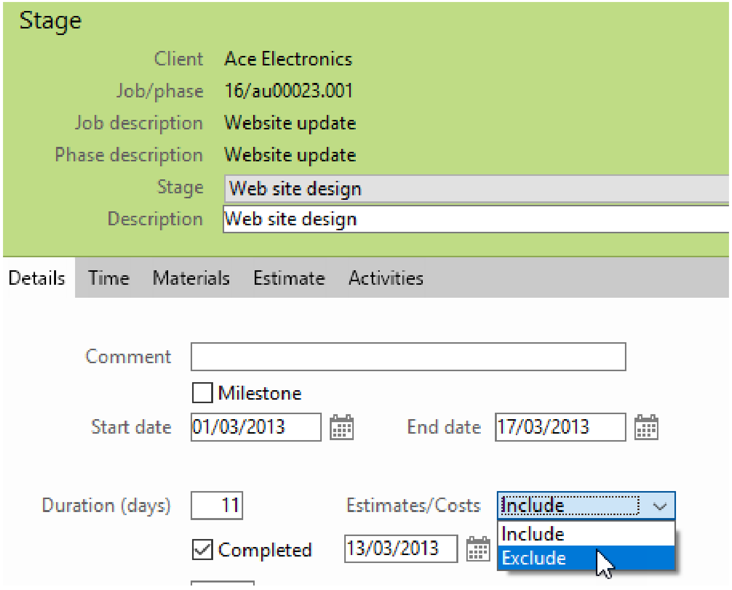


Jobs & phases

Special stages

Two tier jobs

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

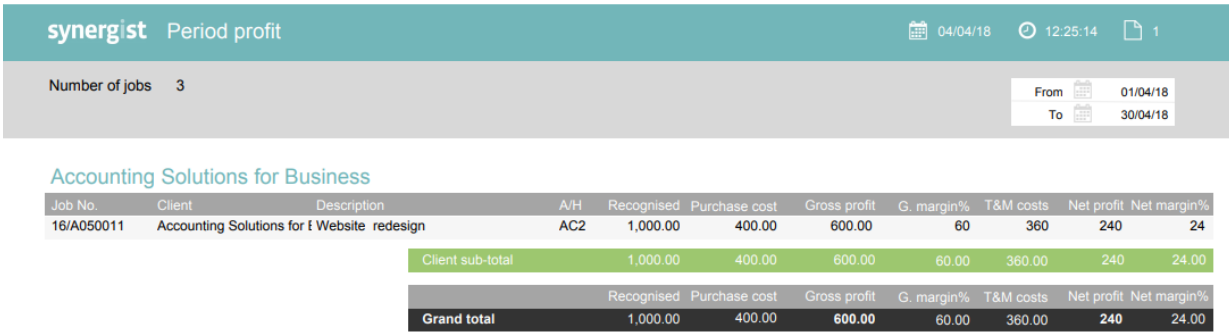


Reporting

Period profit report

Improved format

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



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

Number of jobs 3

From 01/04/18
To 30/04/18

Accounting Solutions for Business

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

	Recognised	Purchase cost	Gross profit	G. margin%	T&M costs	Net profit	Net margin%
Grand total	1,000.00	400.00	600.00	60.00	360.00	240	24.00

Data viewer tool

Opportunities

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

- Estimated time
- Actual time

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

Activities

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

Cost & quotes report

Export version

Variance added to the export version of the report

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

Billing plans summary report

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

☑ Only with billing plan/quote variance

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

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

Ace Electronics

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

	Total Quoted	Total Planned	Total Quoted
Grand total	6,020.00	3,309.10	2,710.90

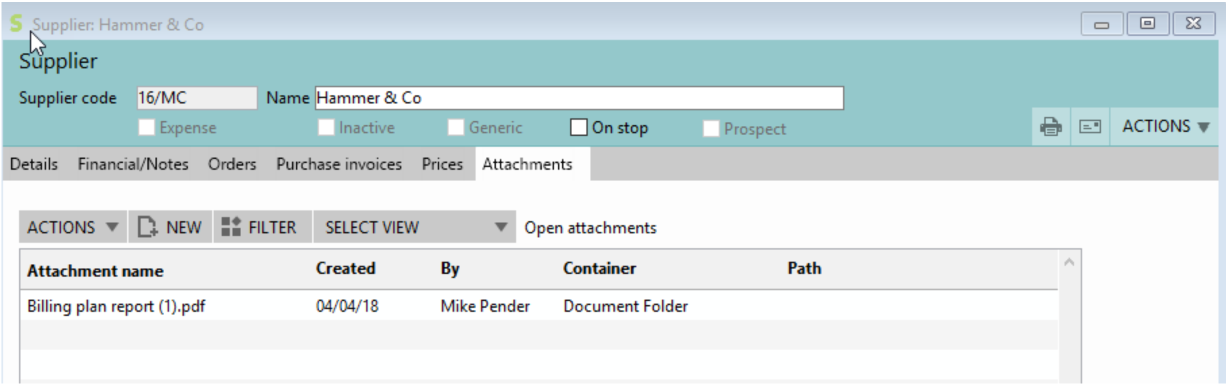
Suppliers & Purchasing

Attachments

Support for suppliers, purchase orders & purchase invoices

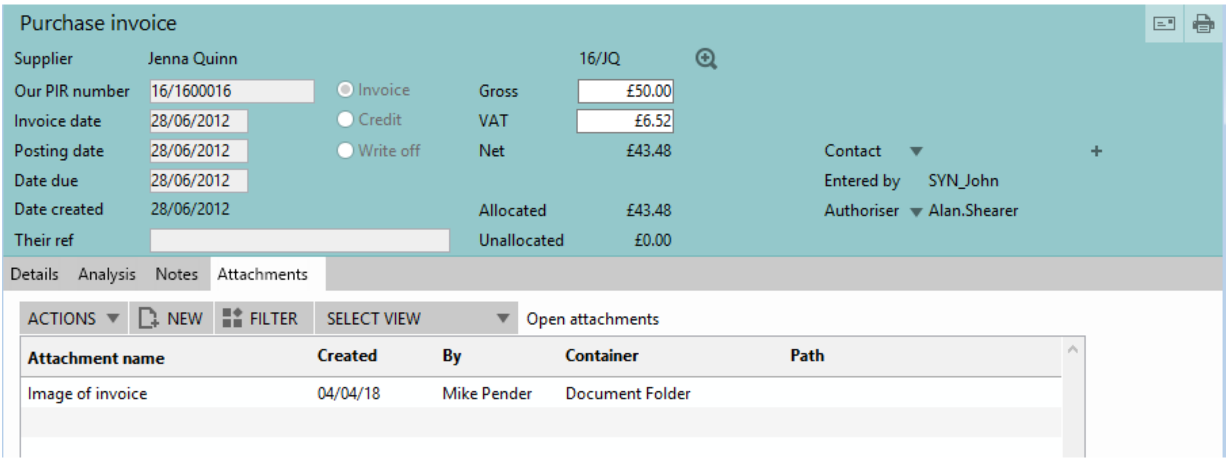
Previously it was only possible to attach documents to Client/client contacts/jobs/phases/activities. We have now extended that functionality to the purchasing side of Synergist.

Supplier attachments tab



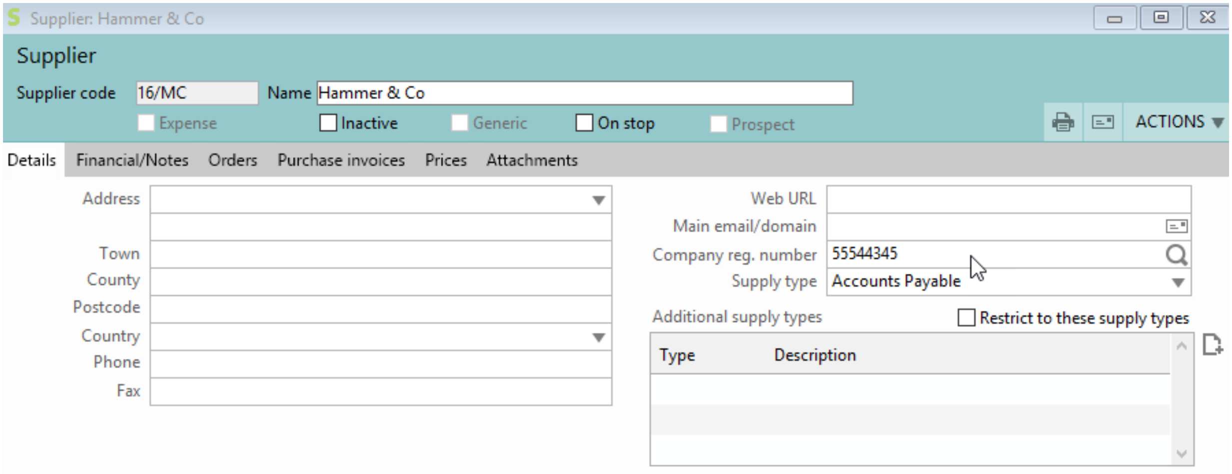
Purchase invoice attachments tab

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



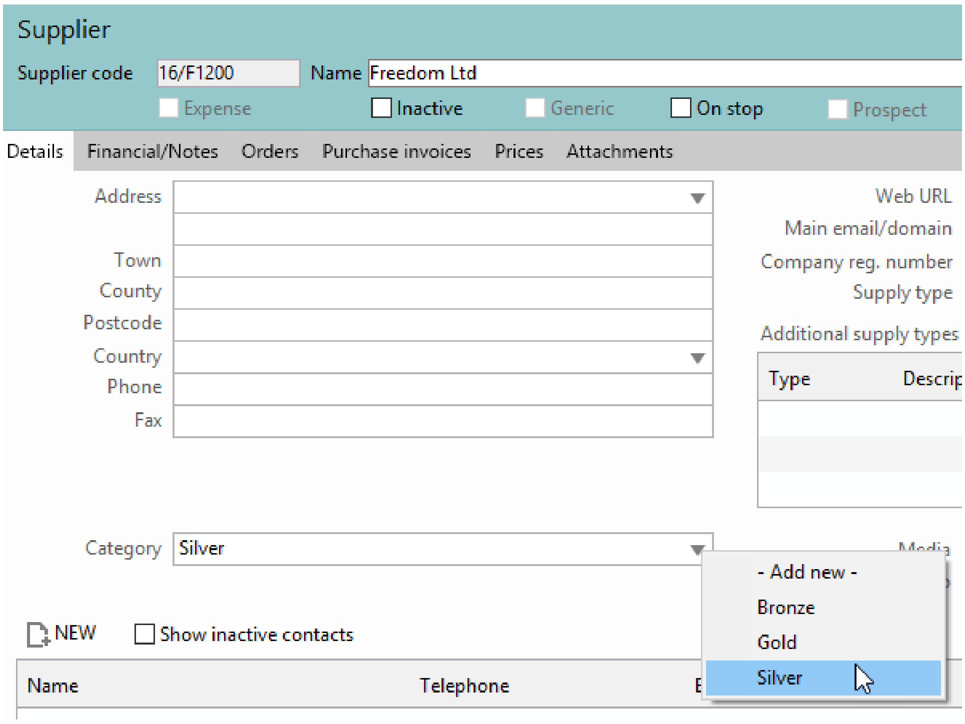
New supplier company registration field

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



Supplier category field change

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



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