Version 12.7 - Release Notes

Synergist Browser Interface

May 2021

Synergist v12.7 requires 4D Server v18

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

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UI & DESIGN

The new 'Simple UI'

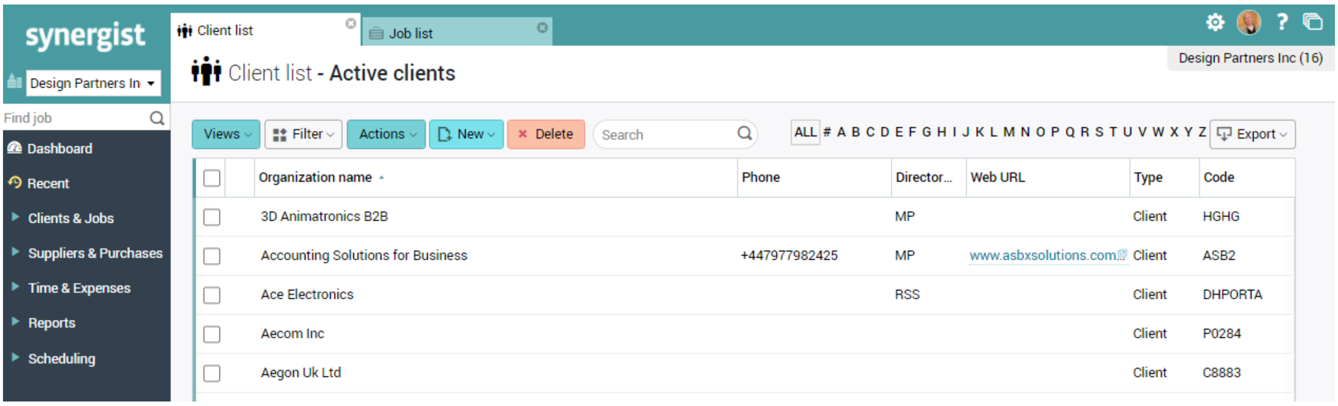
We now provide two user interface designs:

- Classic UI
- Simple UI (new)

Classic UI

This is the current Synergist interface which uses multi-tabs and a vertical menu on the left. This UI is suited to users who often work with multiple pages open at any one time. Synergist is one of the few systems that provides such a flexible and advanced interface.

In the example below, both the Client list and Job list are open and the user can easily switch between the two. The system records exactly where the user is on each tab, so when switching back and forth, the tabs always open in the same state.



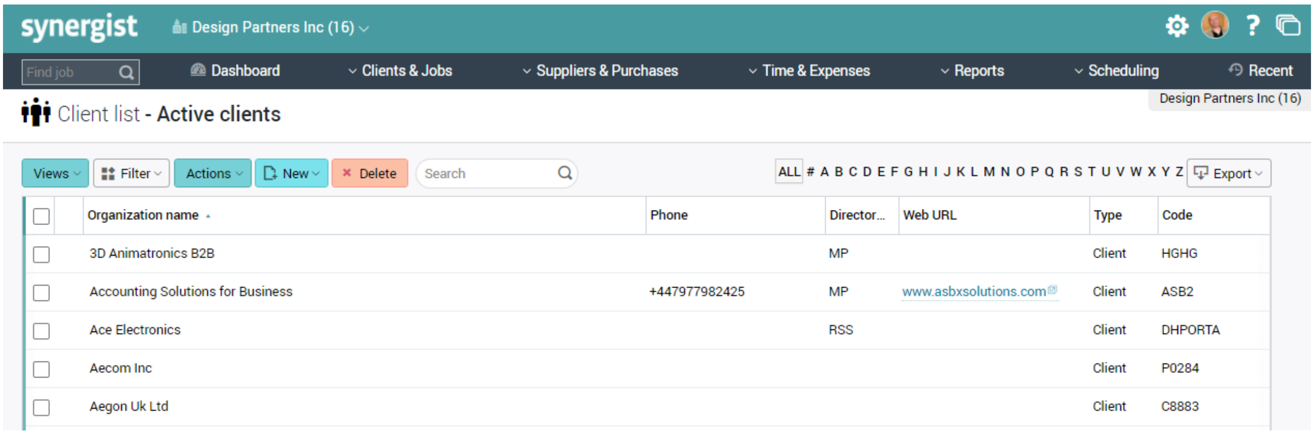
Simple UI

In this new release of Synergist, we have introduced an alternative interface which we call the 'Simple UI'. It is particularly well suited to users who tend to work in one area of the product at a time. It is simple inasmuch as no tabs are shown, and a simple horizontal menu replaces the multi-level vertical menu.

This new interface supports everything accessible from the Classic UI with a cleaner, less cluttered interface - making it easier for users to concentrate on key tasks.

Simple UI screen layout

In this example, the screen displayed is essentially the same as the one above except that there are no tabs or open menus to clutter the screen.



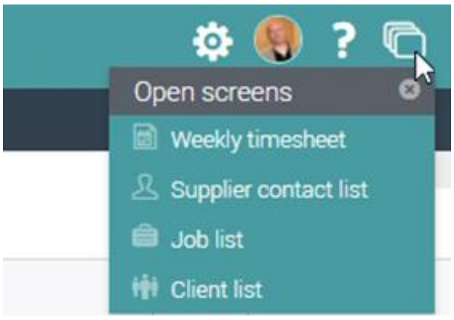
Navigation

To navigate using the Simple UI, the user simply closes one screen to return to the previous screen, or accesses the horizontal menu to select a screen.

Open screens

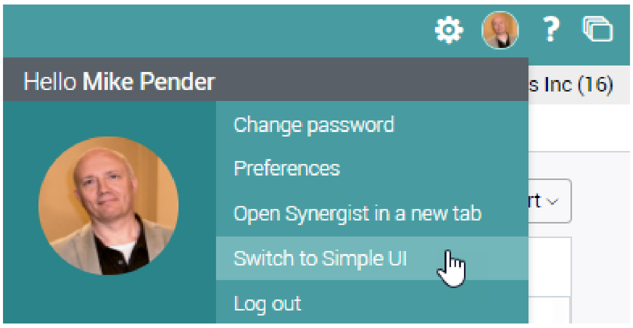
The 'open tabs' are present for users who still wish to directly access open screen - these are now found on a drop-down list. The list is opened by clicking the 'Open screens' icon.

In this example there are four open screens. The user can select a screen (previously a tab) to access it directly, or close one or all of the open screens.



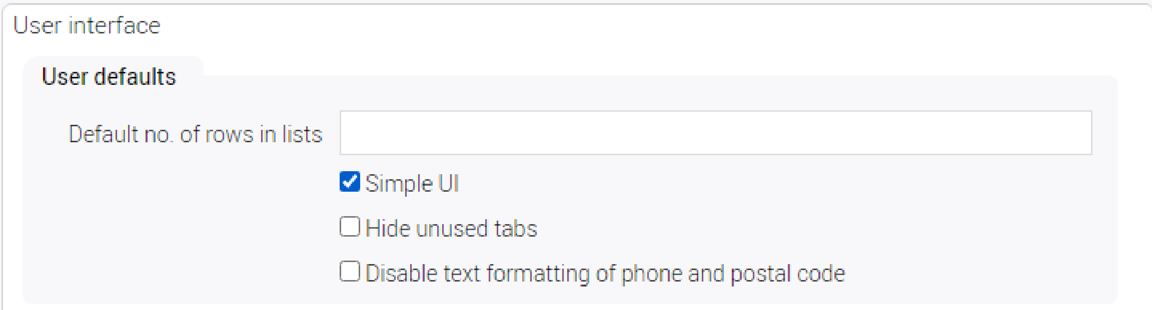
Try out the new Simple UI

To switch to the Simple UI, click on the user avatar in the top right of the screen and select 'Switch to Simple UI'.



Default in system parameters

If you want to default all new users to using the Simple UI, tick the 'Simple UI' box in Utilities > System parameters > Settings tab.



Hiding unused tabs

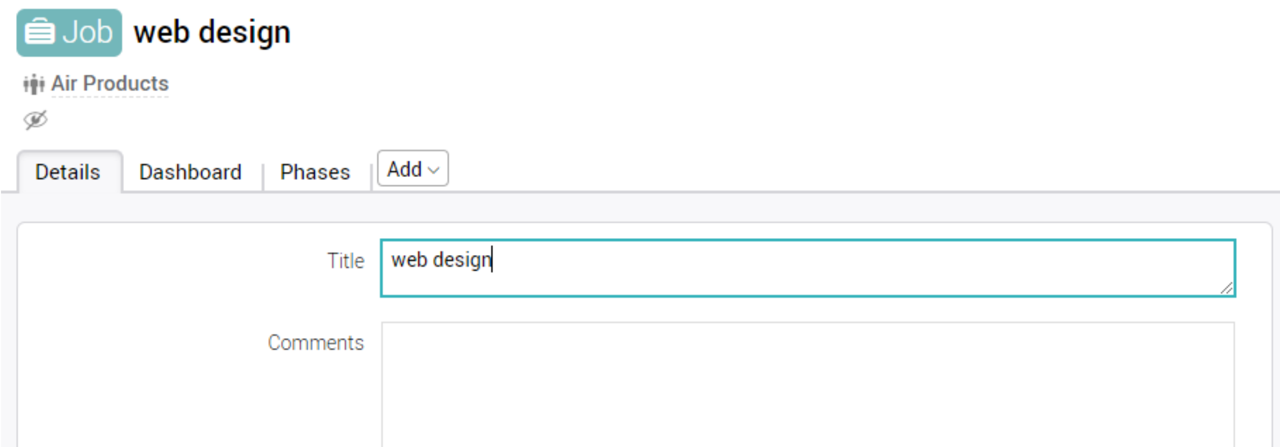
In addition to the 'Simple UI' option, we have added a new feature to minimise the number of tabs displayed on the job and phase cards.

By selecting to 'Hide unused tabs' the user will only see tabs that have data entered. This has the advantage of uncluttering the job and phase cards – so only relevant tabs are displayed. It also provides a simple workflow feature. The tabs can be sequenced in the order of entering data. For example, a user normally creates an estimate prior to creating a quote. They will be guided to enter the required data by simply selecting the next tab from the 'Add' list (see example below).

In the following example, a new job has been created. The only data entered for the job is the job description.

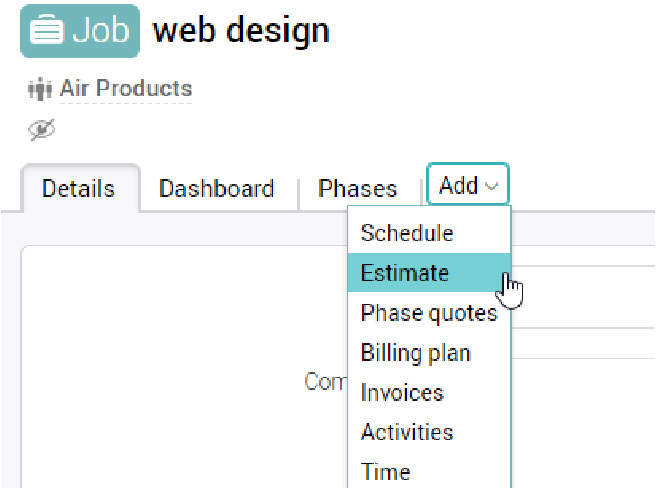
There are only 3 tabs showing. These three tabs are always displayed – but all the other tabs are now hidden.

The user can immediately see that this job has no estimate or quotation.



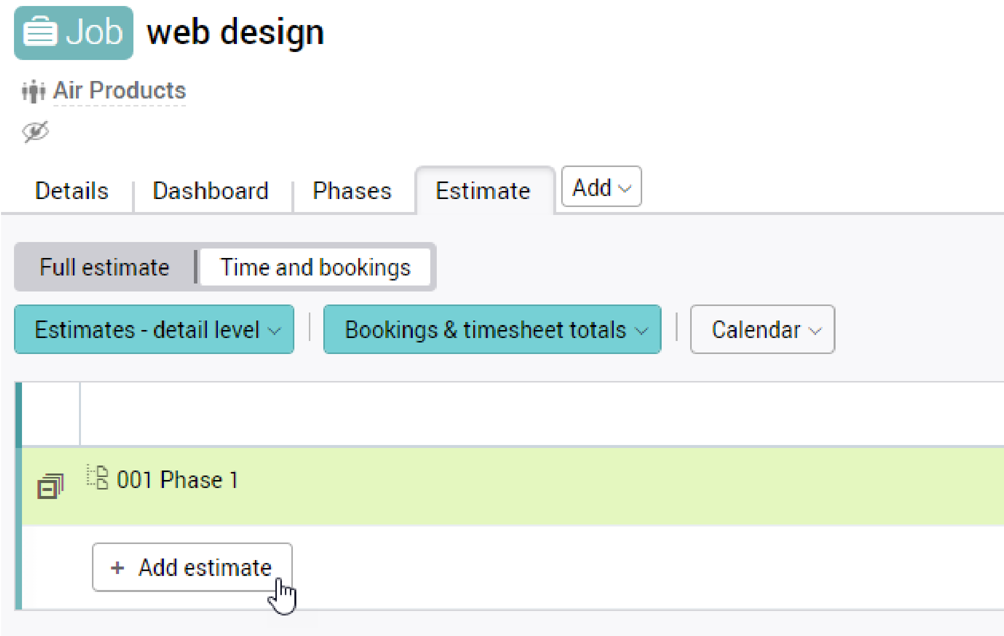
Adding an estimate

To add an estimate the user will open the estimate tab by clicking the 'Add' button and selecting 'Estimate'.



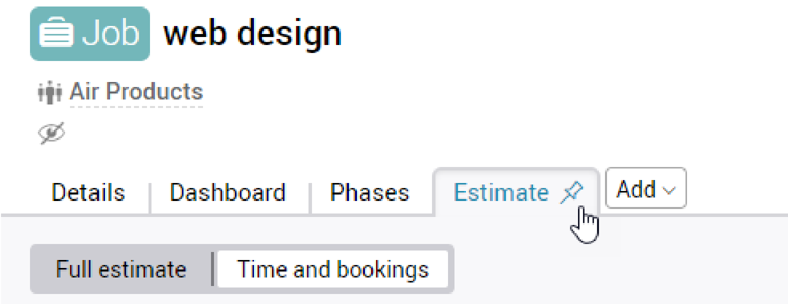
The estimate tab now appears on the job and the user can now start building the job estimate in the normal way.

Note: If the user fails to enter any data into the tab, the next time they open the job the tab will be hidden.



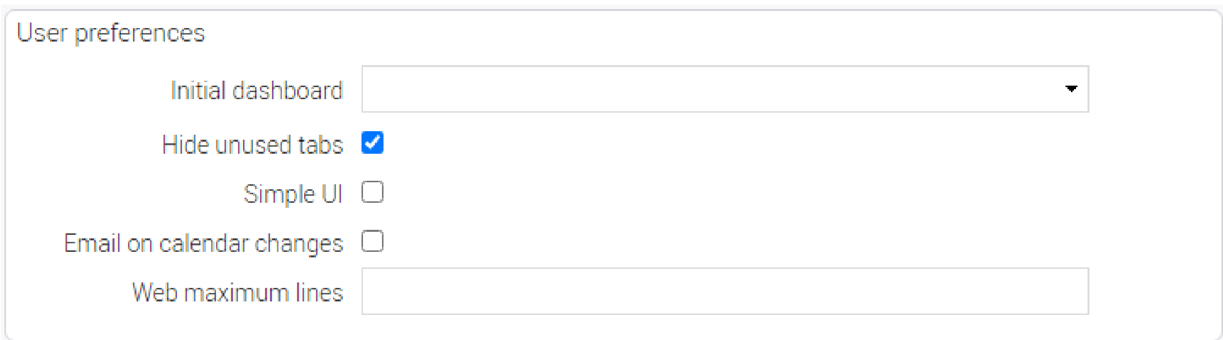
Pinning a tab

If a user wishes to always see a particular tab open, even if there is no data for this tab, the tab can be pinned open. Simply click the pin icon. This tab will now be open for all jobs and phases for this particular user. To unpin a tab – reverse the procedure.



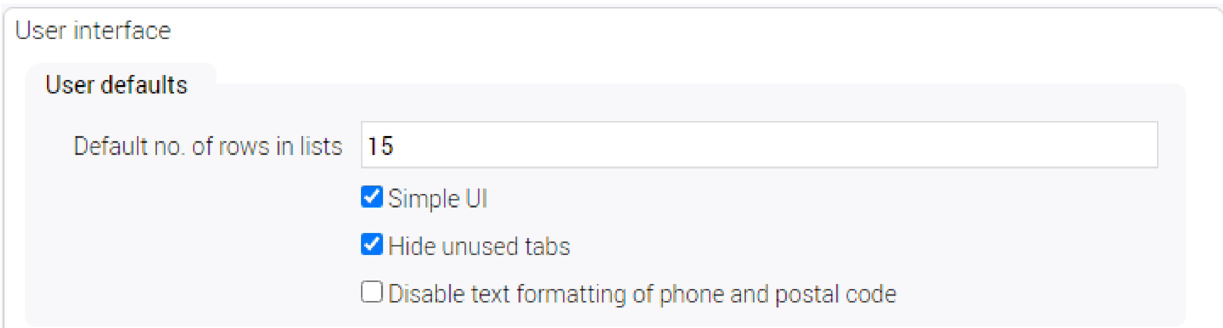
Turning on 'Hide unused tabs'

This feature can be turned on by individual users – by clicking the user avatar at the top right of the screen and selecting Preferences.



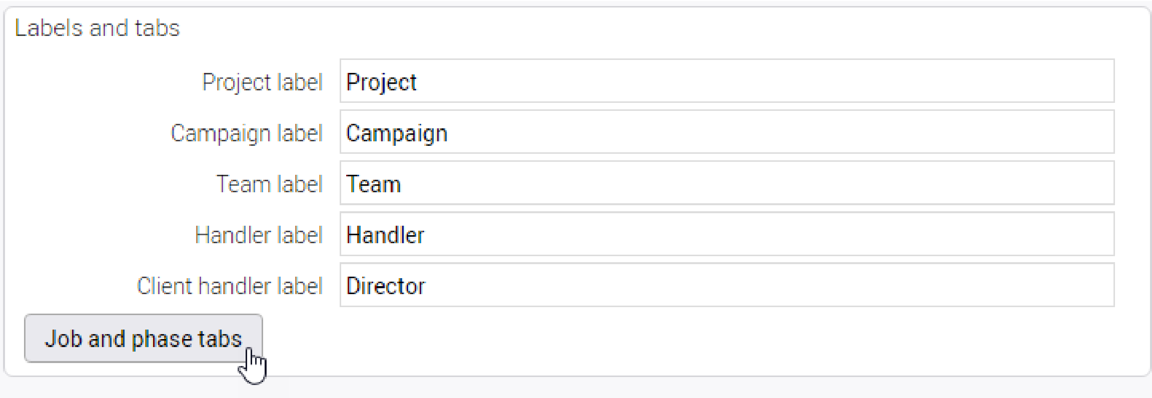
Defaults

The default settings are set in Utilities > System parameters > Settings tab. These defaults will be applied to any new users added to the system.



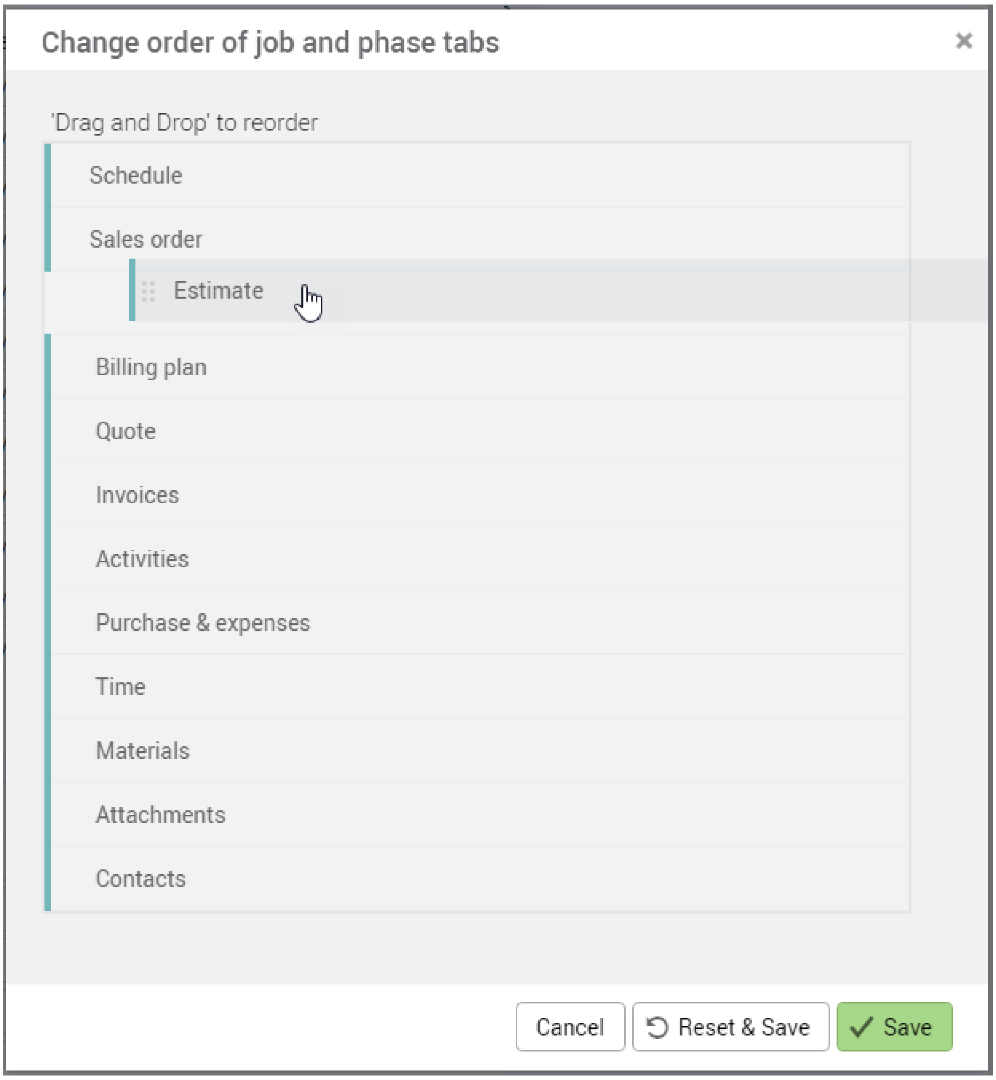
Job & phase tabs

The default order of the job and phase tabs has been changed in this release to more accurately represent the most common workflow. However, this default can be changed in System parameters > Settings tab > Job and phase tabs.



Changing the order of the tabs

Drag and drop items in the list to re-order the tabs on jobs and phases.



KANBAN & ACTIVITIES

Kanban user groups

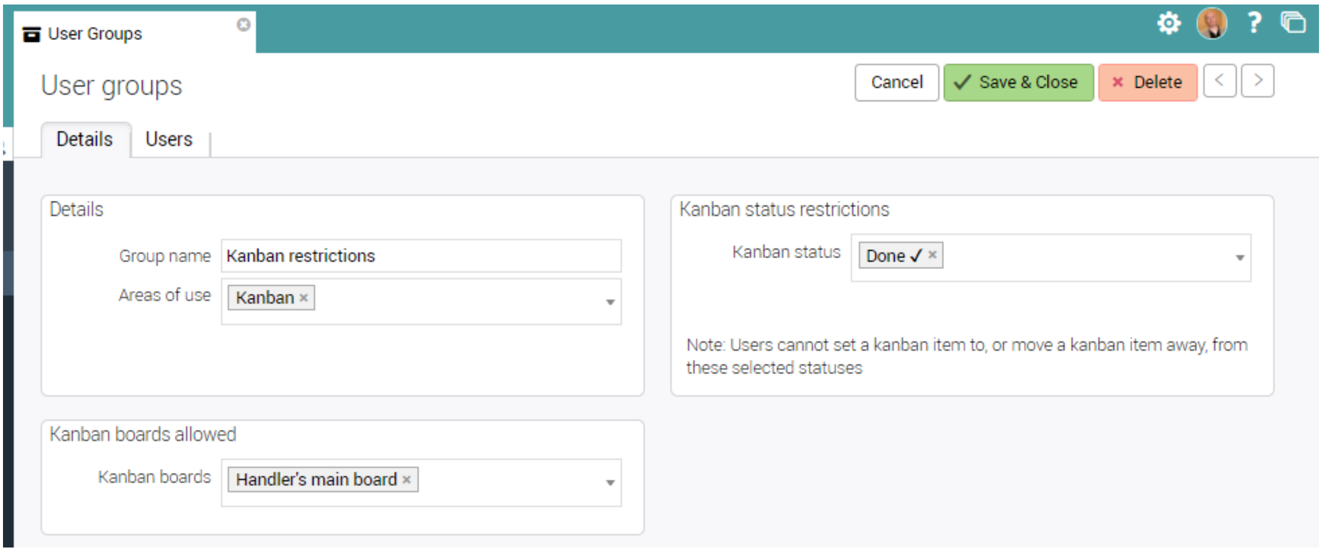
A new type of user group has been introduced. This is a 'Kanban' user group. If you wish to restrict the actions of certain users, you can set up a Kanban type user group and specify any Kanban statuses that a user should be restricted from moving to/from. You can also specify the Kanban boards allowed.

Set this feature up via: File maintenance > User groups

Example: User group called 'Kanban restrictions'

Any user allocated to this group will be:

- Unable to move an item in the Kanban chart into the 'Done' column
- Unable to move an item that is already in the 'Done' column
- Unable to delete an activity that is set to the 'Done' status
- Restricted to using a single Kanban board



To enforce these rules, simply add users to this group.

Multiple groups

Users can be added to more than one user group. If a user is a member of more than one Kanban group, the restrictions are added together. Similarly, the board restrictions are also added together.

Example:

Group 1
Access to 'board 1' only
Restricted status: Testing

Group 2
Restricted status: QA

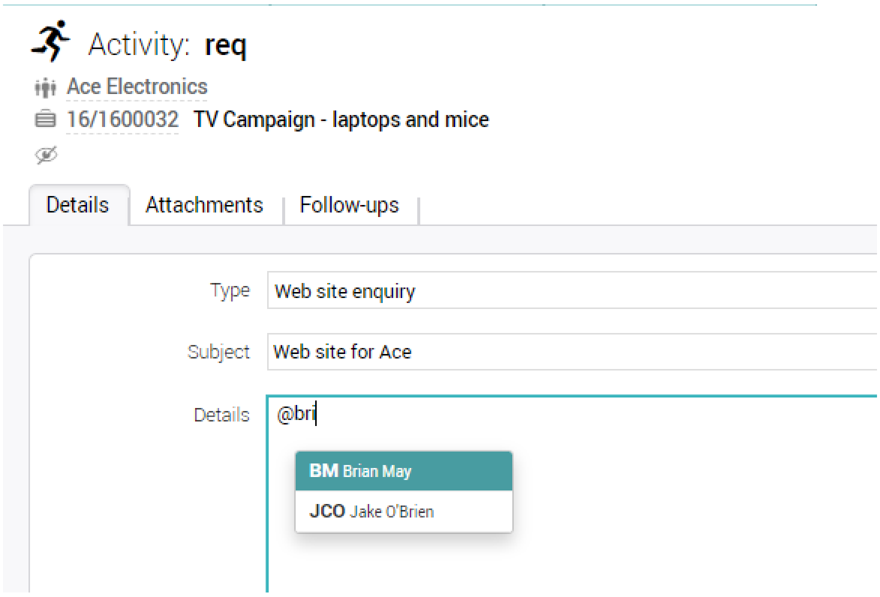
This user would have access to a single board ('board 1') and would have restricted access to statuses 'Testing' and 'QA'.

Use of @mentions

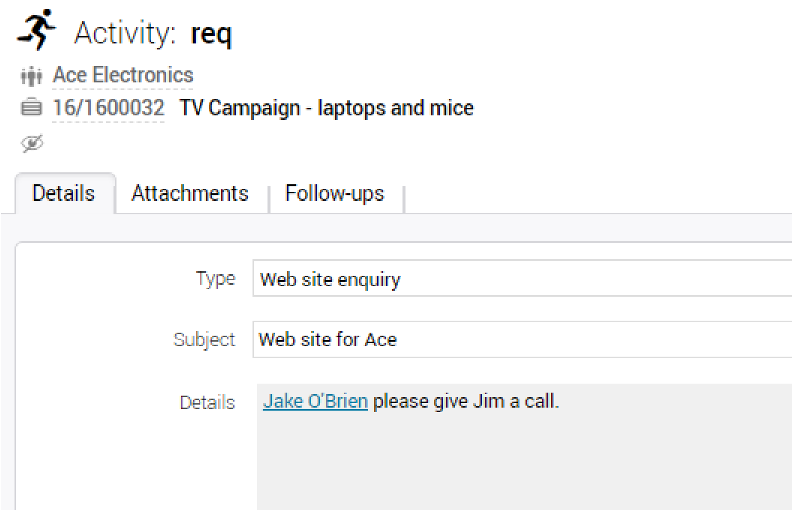
Using the new @mention feature in activities, you can select a user's name inside a comment or in the main details area of an activity. Doing this will embed the user's full name in the field and will alert the user (via email) that they have been mentioned in this activity.

Example of using an @mention in the details area of an activity

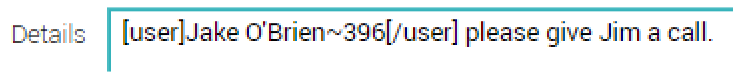
Type in the'@' symbol and the first few letters of the user's name you wish to reference. A dropdown list of users will be displayed.



Select the user and continue typing in the message/description. When finished, click outside of the edit box to see the formatted text.



Note: When in 'Edit mode', the formatting tags will show. This is to be expected.



Sending the alert

On saving, an email alert will be sent to the person mentioned. The alert will only be sent once. If you subsequently @mention another person in the description, only the new person will receive an email alert.

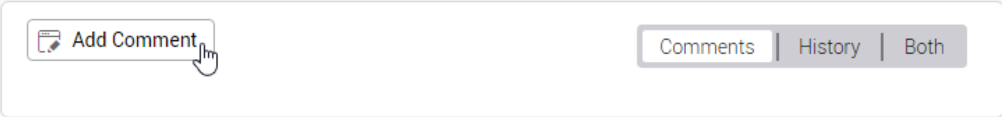
Pasting in images

You can now paste an image into the text area of a comment or in the main activity description area.

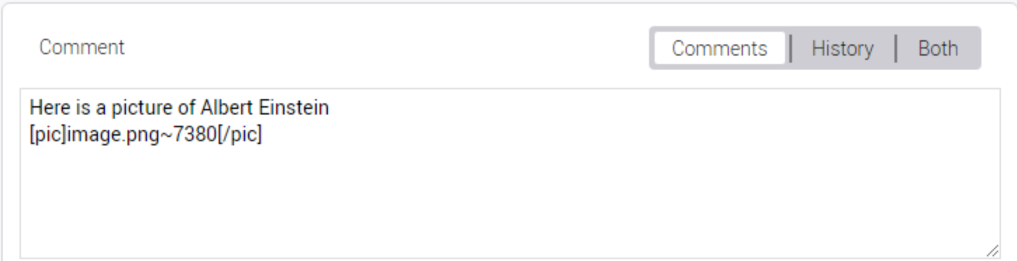
Example of pasting an image into a comment

Steps:

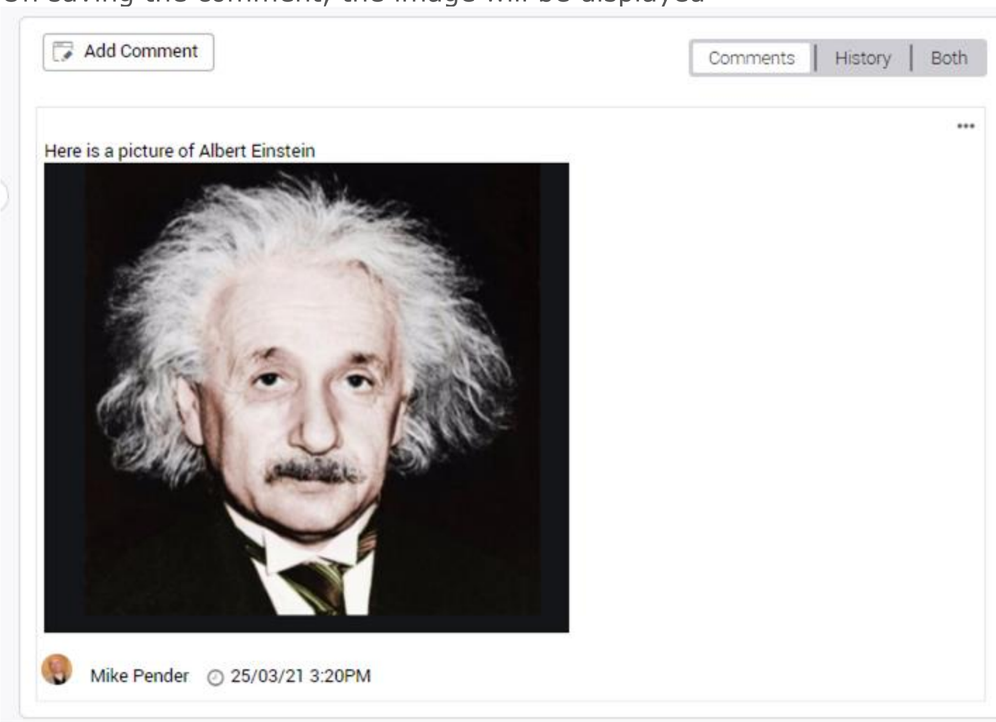
1. Find an image you wish to use and copy it to the clipboard
2. Navigate to the comments area of an activity and click 'Add Comment'



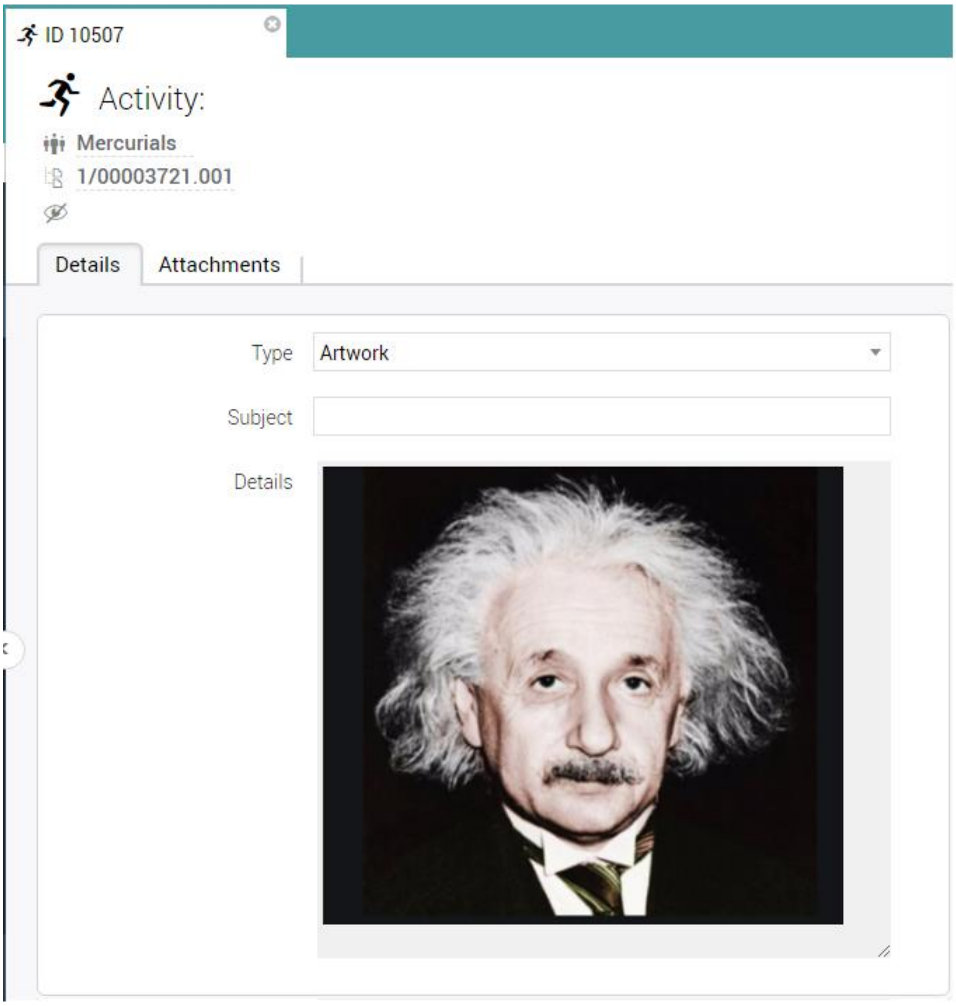
3. Use Ctrl-V to paste the image into the comment area



4. On saving the comment, the image will be displayed

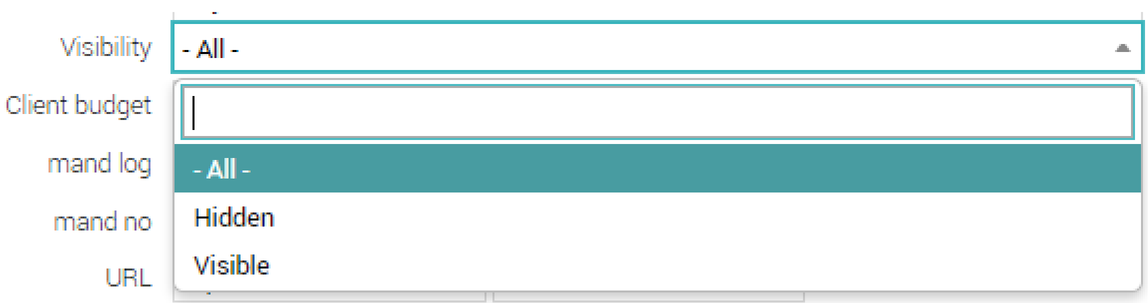


Note: Images can also be pasted into the activity details area.



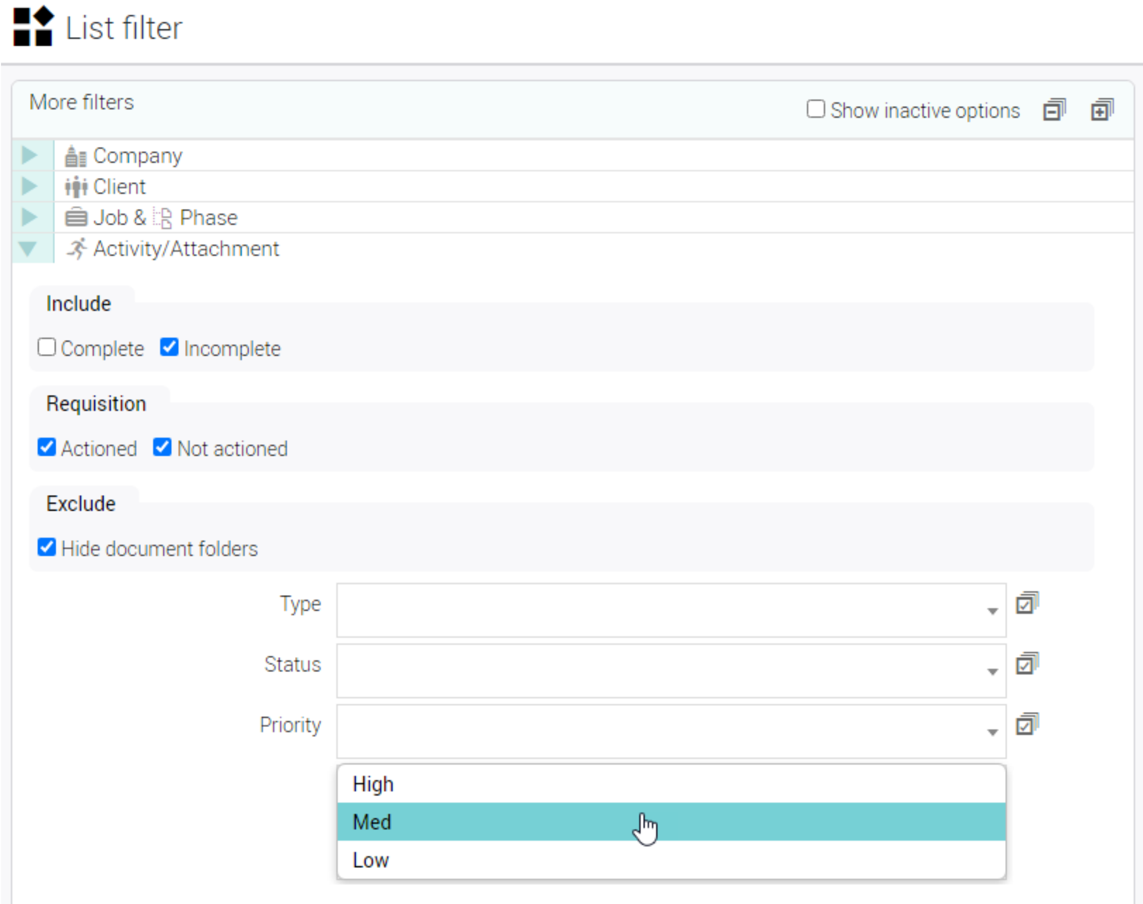
Storing of images

Images pasted into the details area or into comments are saved as attachments against the activity. However, by default, these images are hidden from the attachment lists. If you do need to access these images, they will be included in the attachments view if the 'visibility' field in the attachments filter is set to –All-.



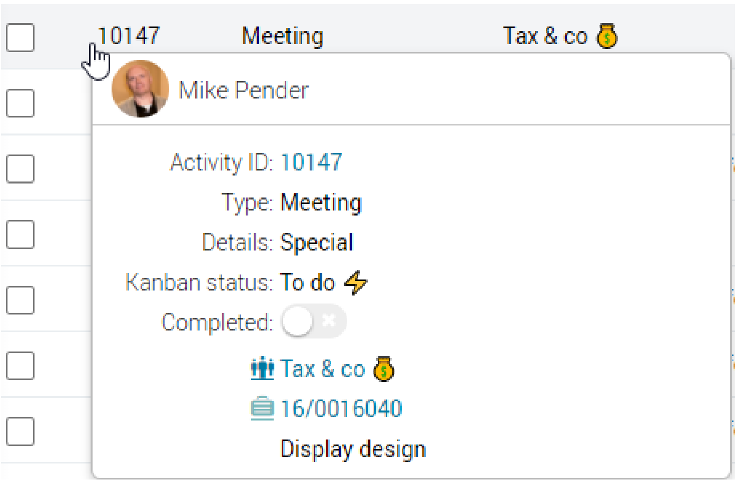
Filtering the activity/Kanban lists

It is now possible to filter on the 'Priority' level of an activity.



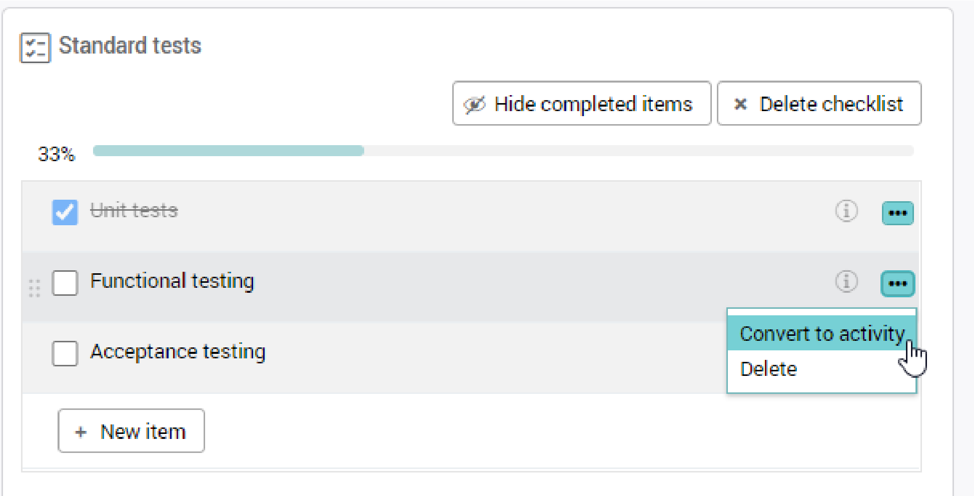
Hovers on the activity list

Hover information is now available on activity lists including requisitions.



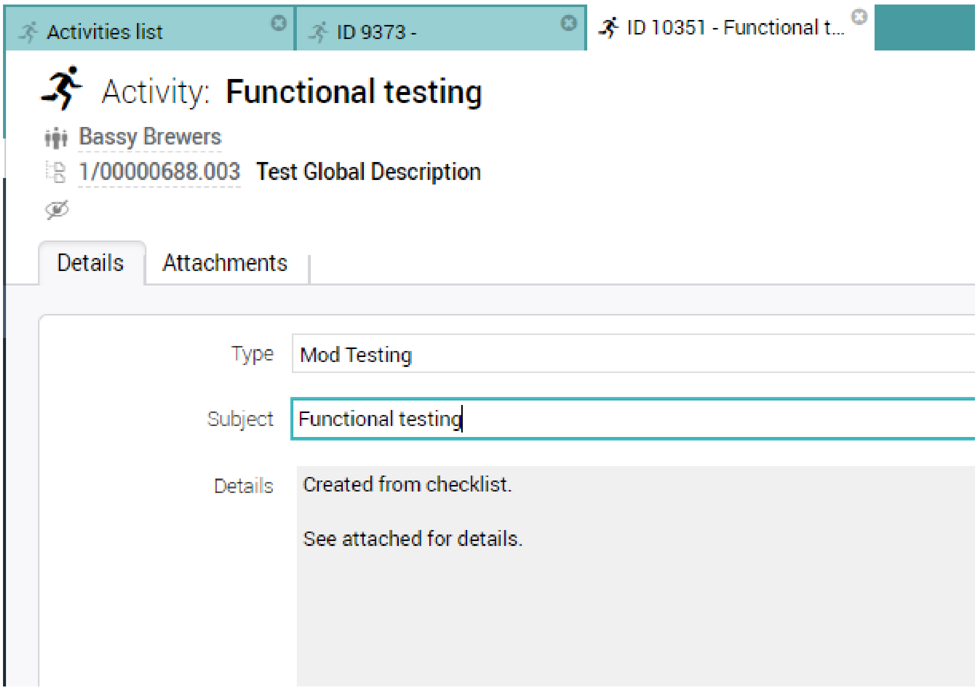
Promoting a checklist item into an activity

Activities can have a set of checklist items. If you wish to promote a checklist item to a new activity, simply select from the drop-down options menu. This will create a new activity and the checklist description will be used as the subject for the new activity.



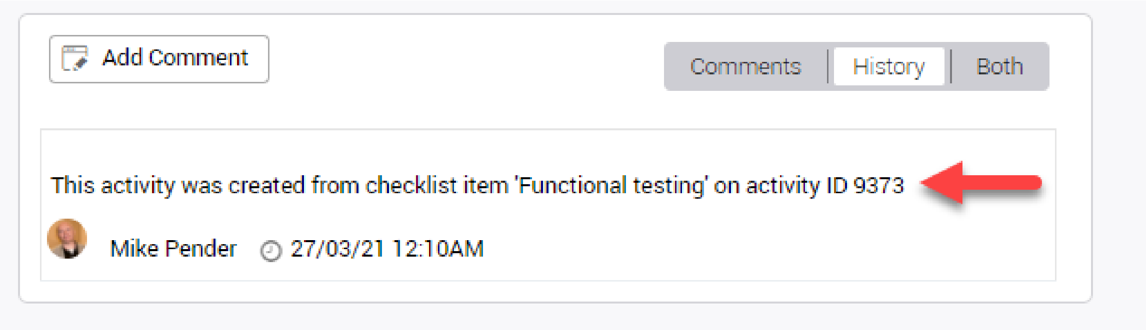
The promoted checklist item is converted into an activity

The original checklist item is removed from the original activity and a new activity created.



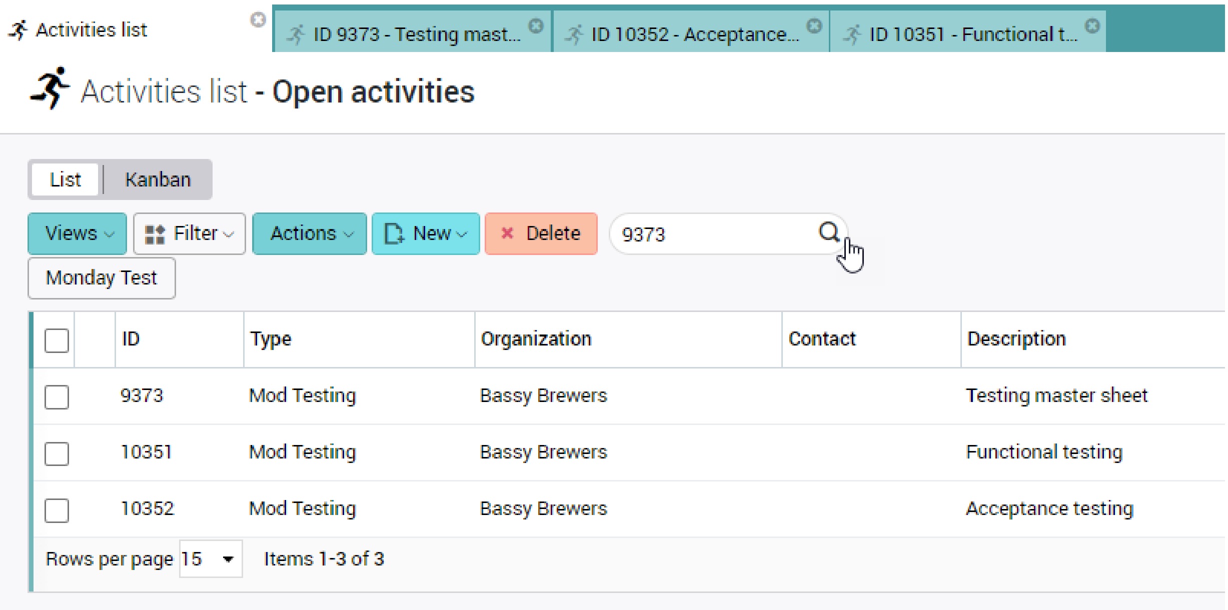
History

An entry is added to the history area in both activities.



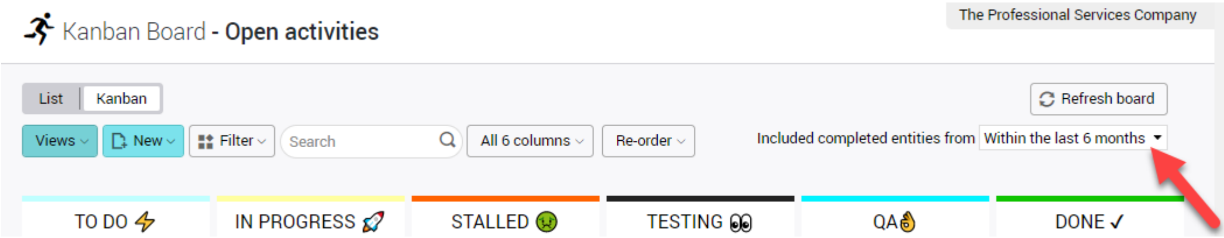
Searching for promoted checklist items

Searching for the source activity using its activity ID will display all promoted checklist items.



Include completed entities from <date range>

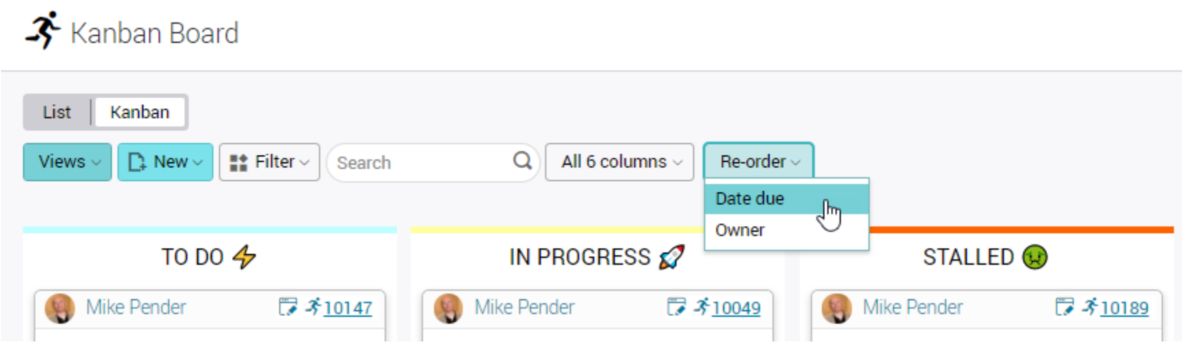
This value is now saved back to user settings. On logging back in, your previous choice will be remembered.



Re-ordering the Kanban

Kanban boards are designed so that users can manually re-order the entries by dragging and dropping. This enables users to move key items to the top of the Kanban. However, this process can be time consuming if there are many items in the Kanban.

We have therefore added a 'Re-order' button that will automate this process.



Bookings & timesheets

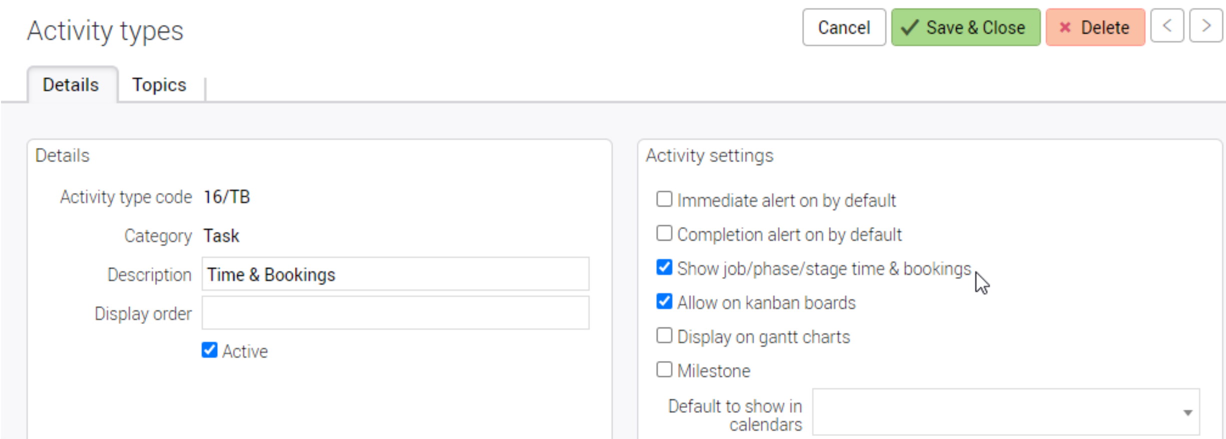
Activity records have two tabs for displaying related bookings and timesheets. The bookings are primarily for displaying bookings created via the requisitions system, and timesheets resulting from the requisition.

A new (optional) use for this feature has been added. This feature is designed for users who create a special activity that represents the entire job or phase of a job. This activity can now show all the time & bookings associated with the related job/phase. This is useful since the Kanban can then be used to represent the progress of entire jobs or phases of a job.

To enable this feature, open Activity types in File maintenance.

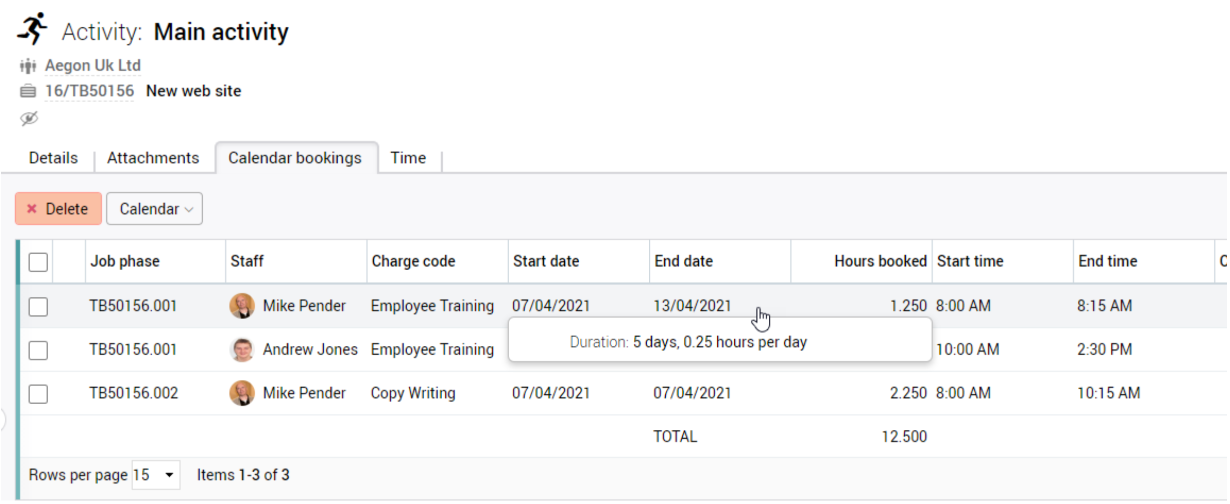
Activity type

Set an activity type to 'Show job/phase/stage time & bookings'.



Activity of this type

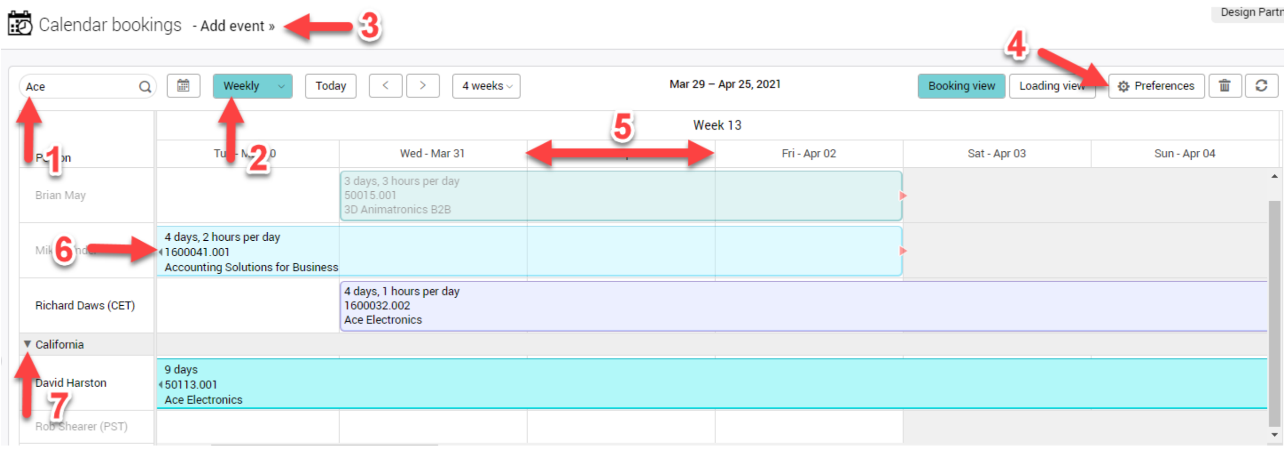
Now any activity of this type will show all the timesheets and bookings posted to the same job/phase that the activity is associated with.



CALENDAR

Calendar design

The calendar has undergone substantial design and performance improvements.



1. Calendar 'highlight' feature - similar to a search feature. Type in a search word and any bookings containing that word will be highlighted.

2. The four views are now on a single dropdown button

3. Add event - now moved to the top of the page

4. Preferences - re-designed and new options added

5. Column width – options on width size
   - Weekly view – new 'wide' option
   - Monthly view – new 'medium' and 'wide' options

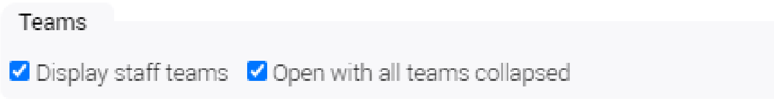
6. Bookings - multi-line options
   - The various descriptions configurations can now be displayed over multiple lines
   - Option to show the duration first

7. Teams – option to open in collapsed state
   - Opening with all the teams collapsed enables the calendar to open more quickly
   - Large individual teams will now take less time to open than previously

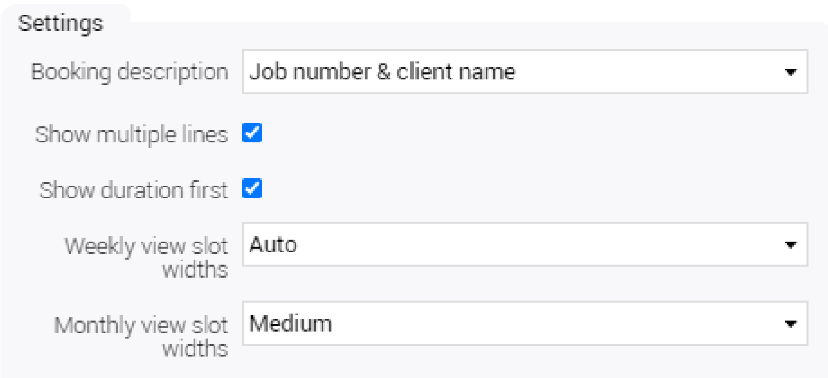
New preference settings

The preferences page has been re-designed. We also now have these new options.

- Teams
  Option to open with teams collapsed (recommended).

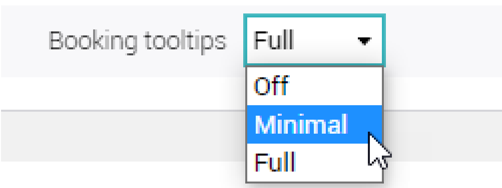


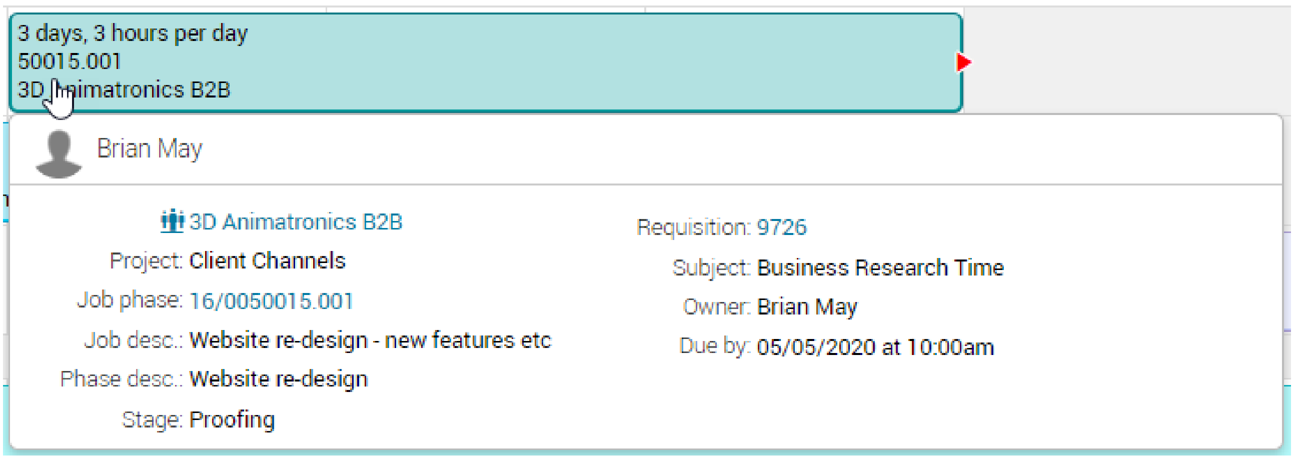
- Settings
  Multi-line descriptions and slot width options. Includes the option to show the duration of a booking first.



Hovers/tooltips

With multi-line booking descriptions, users are less reliant on hovers to provide additional booking information. There are now options to turn off the hovers or alternatively, have reduced hovers (‘Minimal’ option).

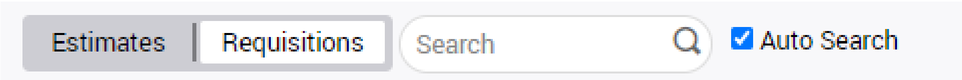




Selection lists – Estimates & Requisitions

The activity and requisitions selection lists (located below the calendar) have been re-designed.

- There are now two options - 'Estimates' and 'Requisitions'
  To the right of these buttons is a search box and the 'Auto search' option



  Large estimate lists can take a long time to refresh and load. By switching off the 'Auto search' the user simply enters a search string (i.e. client name, job number etc.), clicks the search button and the resulting list will load rapidly. This is recommended for users who are experiencing delays in seeing the list refresh

- The list is now paged with the standard user options for selecting the number of rows displayed

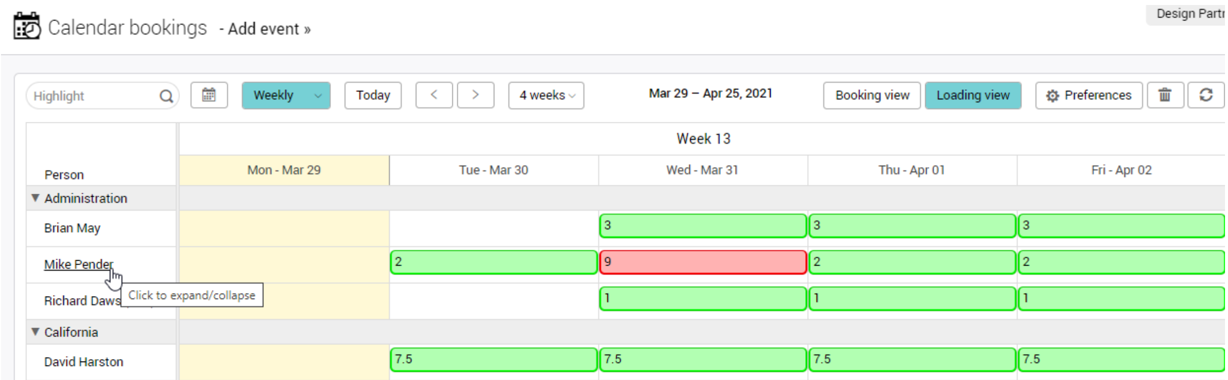
- Improved sorting

Calendar – loading view

The calendar 'Loading view' has been significantly enhanced.

Expand/collapse feature

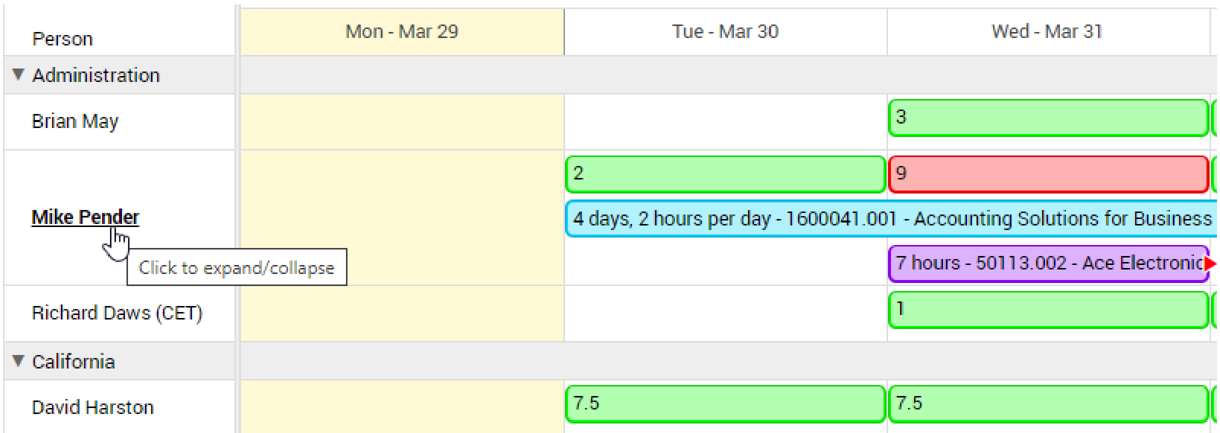
Here we see the standard loading view. If you hover over the staff name you will see there is an option to view the bookings as well as the loadings. You can also expand the entire team or select multiple individuals.



Expanded loading view

The staff resources are now expanded and all the bookings can be seen. From this view you are able to add/move bookings in the usual way.

It is still recommended that the standard booking view is used for booking of time into the calendar. However, once you are ready to check the loading, this new view makes it very easy to manipulate the calendar and adjust loading.

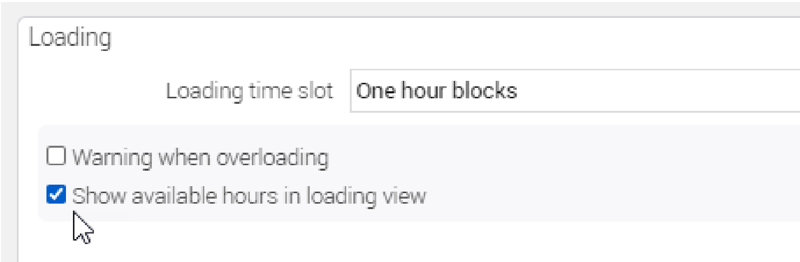


Loading view – show hours available

By default, the number of hours shown on each loading bar represents the number of hours booked. If the number of hours booked exceeds the number of hours available, the bar turns red.

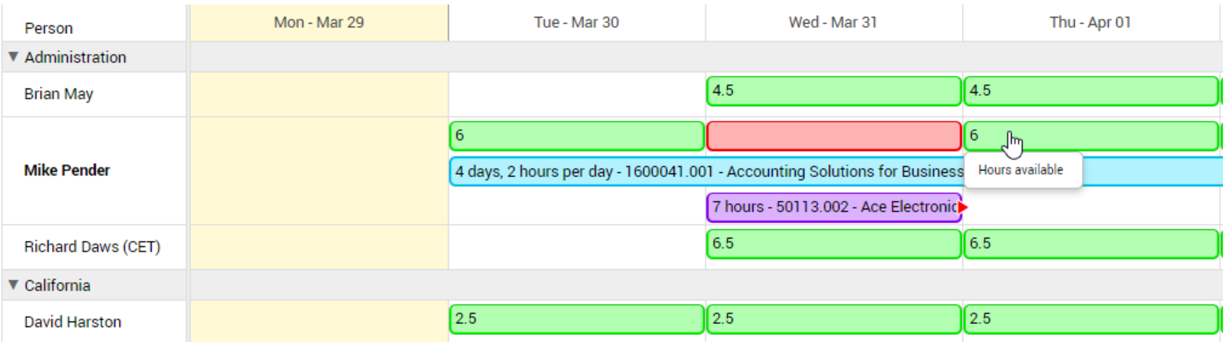
Calendar preferences

New option – 'Show available hours in loading view'.
Under loading preferences there is now an option to show the available hours instead.



Calendar showing available hours

Note: If the cell is overbooked, the red loading bar signifies that the available hours are zero – and no hours are shown.

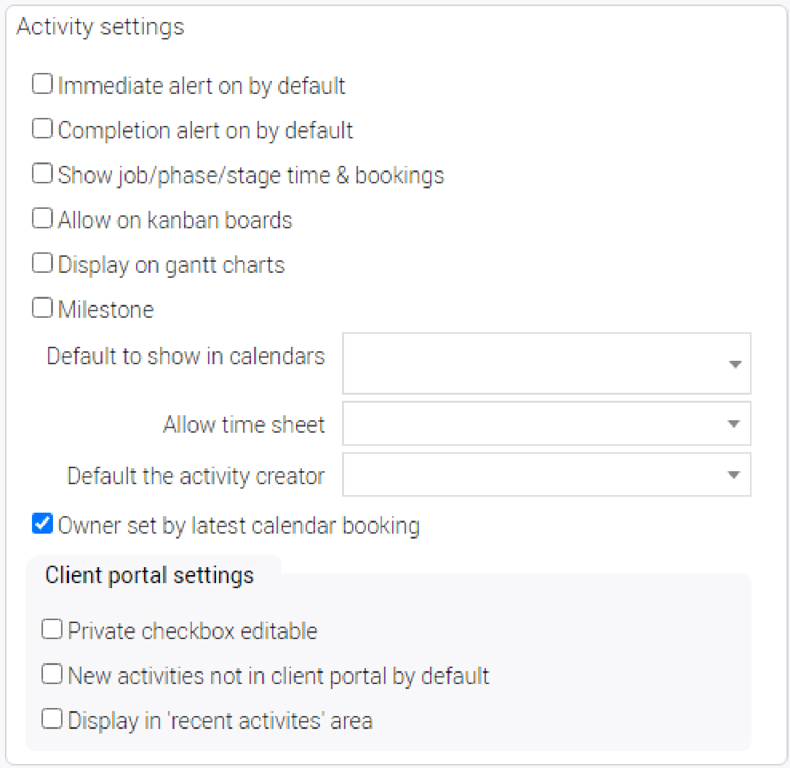


Calendar – requisitions (new functionality)

Auto-allocate activity owner on requisition

With this new feature activated, a requisition's owner is auto-assigned to the same person that is booked in the calendar. This feature is only appropriate for companies that always book an individual requisition to a single resource.

This feature can be switched on by navigating to File maintenance > Activity types, opening a 'Requisition' activity type and checking the box 'Owner set by latest calendar booking'.



Use of this feature

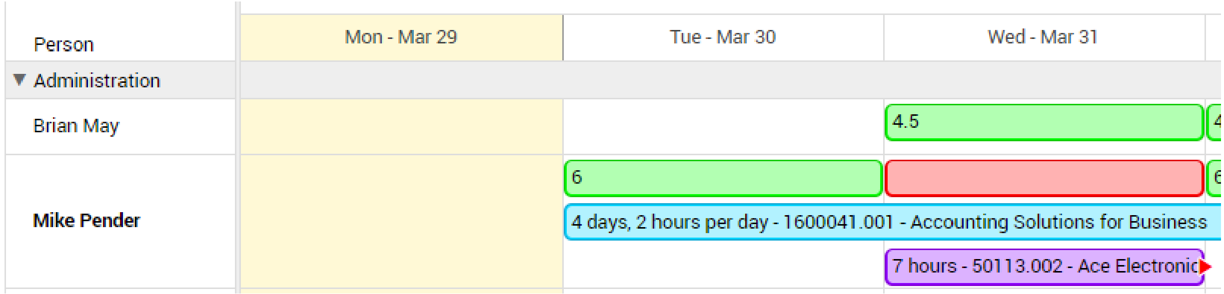
This feature enables staff to use both the My calendar and Kanban when tracking their workload:

- My calendar
  To track allocated work (bookings generated from the requisition), and post timesheets.

- Kanban
  To track the status of the requisition. Since the requisitions appear in the Kanban, it is possible to set up a default Kanban view for your staff that shows the jobs they are currently working on.

Example:

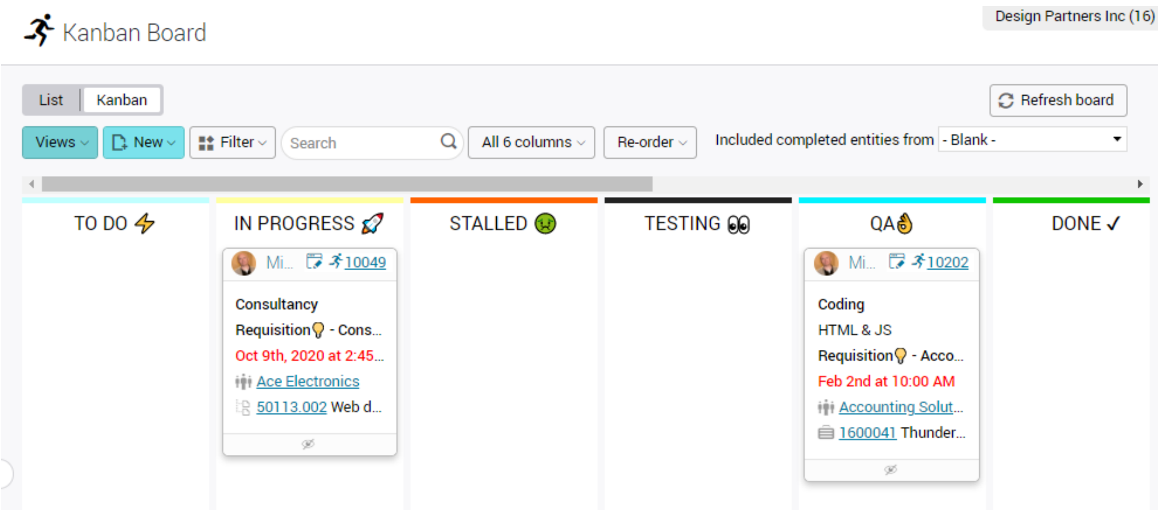
Here are Mike Pender's bookings:



Kanban

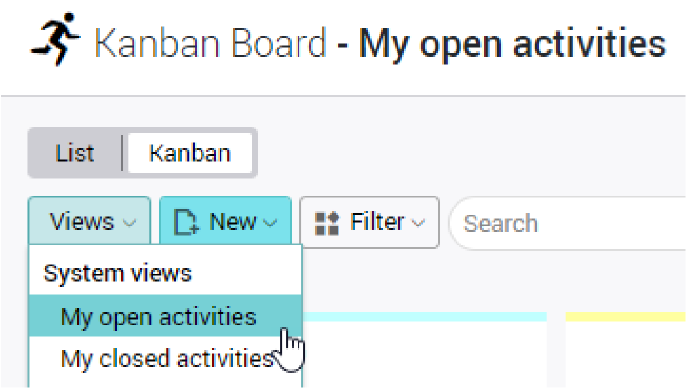
Here the same two items appear as requisitions in the user's Kanban view. In this example, one has been moved into QA before being considered fully completed.

The QA department would have their own view of all the requisitions that have been moved into Quality Assurance. The owner of these requisitions is the person who actually worked on the task. If the work failed QA, it might be moved back into the 'To Do' Kanban stage at which point further calendar bookings might be required.



View

Staff should use the 'My open activities' view in the Kanban. This can be set as their default view.

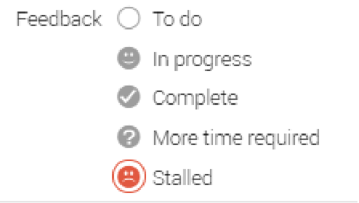


My Calendar alerts

Currently, an alert is sent to the person who created a booking if it is moved to one of these feedback statuses:

- More time required
- Stalled

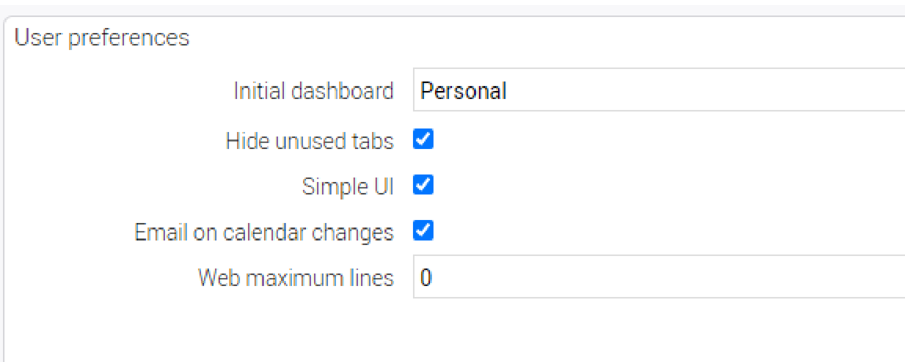
Example:



Now in addition to the creator of the booking, the account handler for the job phase being worked on will also get the alert.

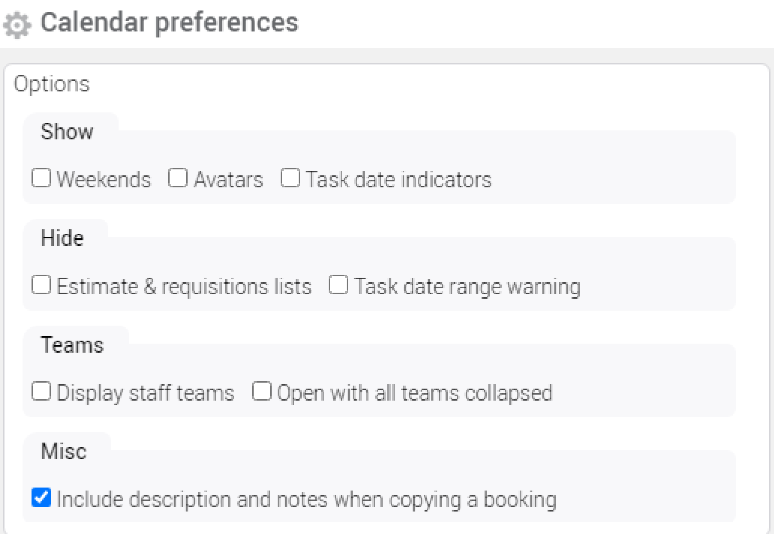
Opting out of calendar alerts

If the handler does not want to see calendar alerts, they can opt out in user preferences - accessible by clicking their avatar in the top right corner of the screen.



Recurring bookings

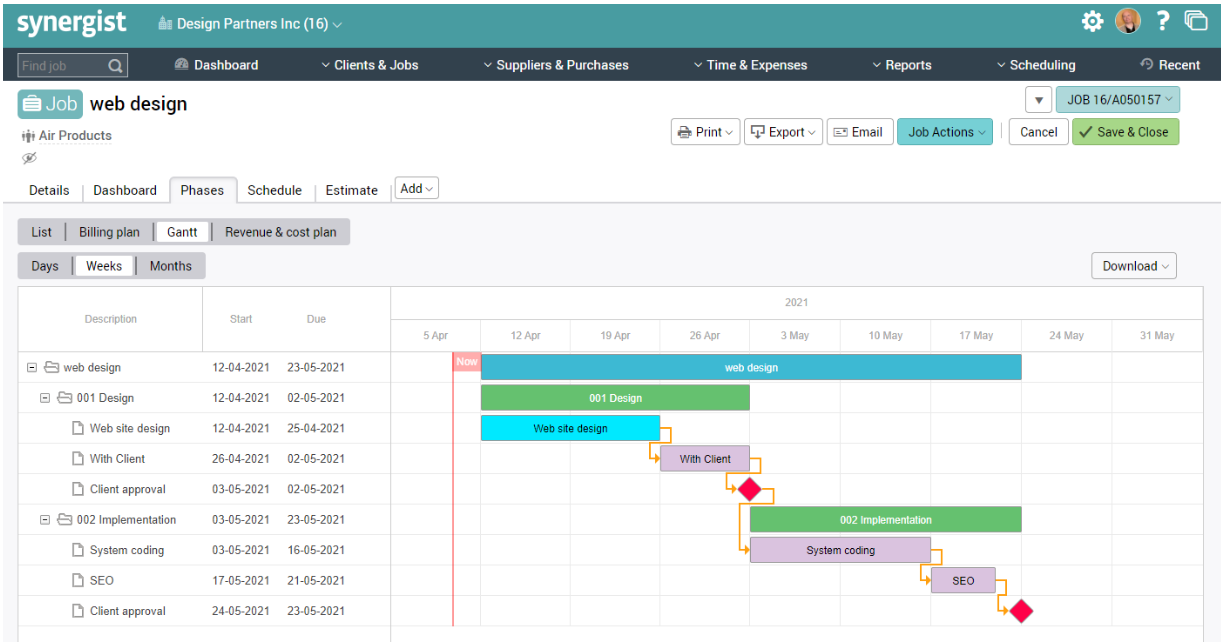
On creating recurring bookings, the original booking notes are now copied over to the new bookings. This feature is activated in Calendar preferences.



GANTT CHARTS

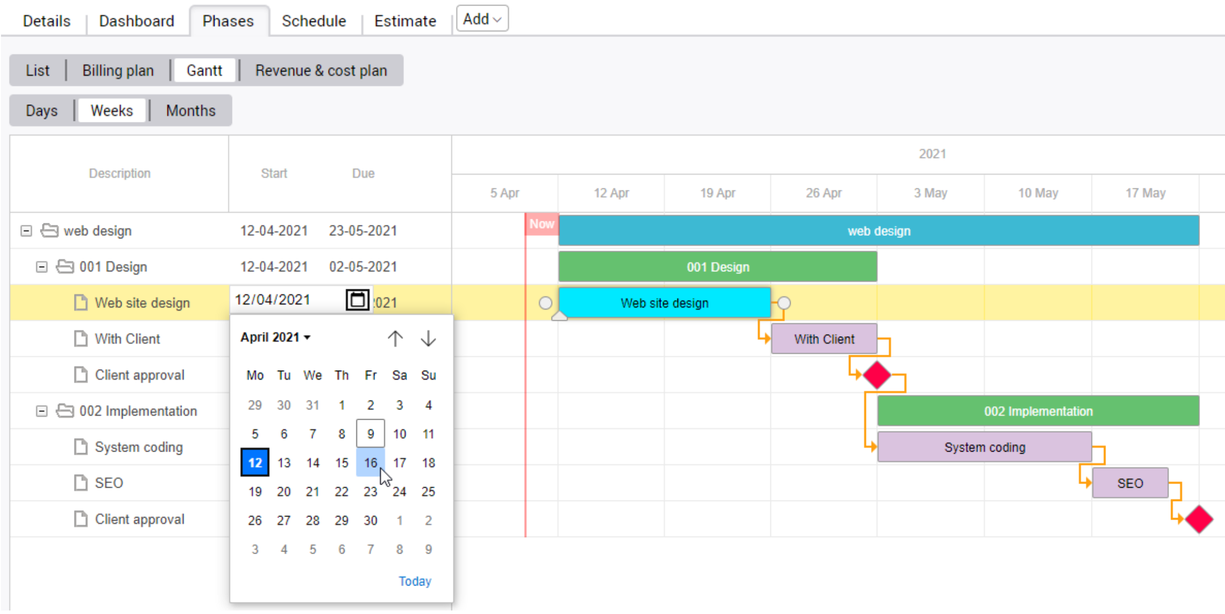
The Gantt chart feature has undergone extensive development to improve its general UI and functionality.

Example of a Gantt chart showing two phases and related stages

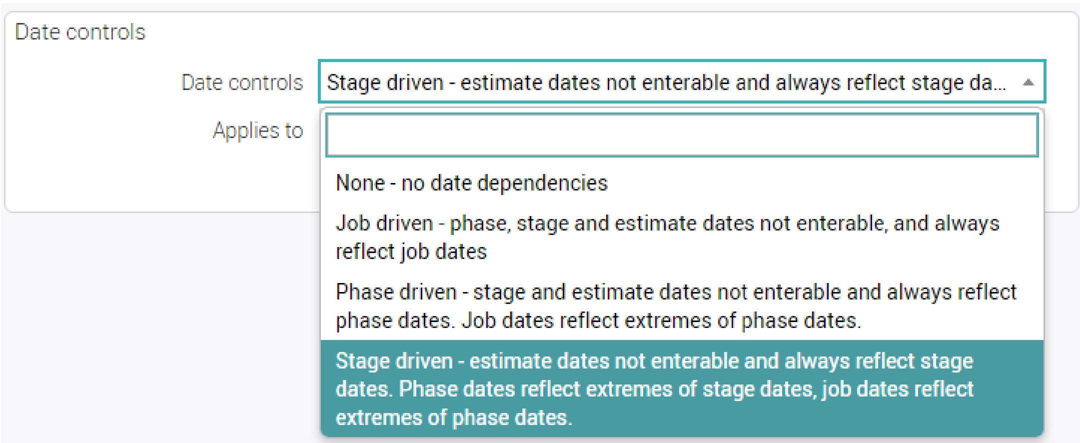


Editing dates

On the left-hand side of the Gantt are two columns, 'Start' and 'Due'. These dates can now be edited inline.



Note: Dates can only be edited according to the date controls selected in Company settings > Advanced tab. By default, this means stages control the start and end dates of phases.

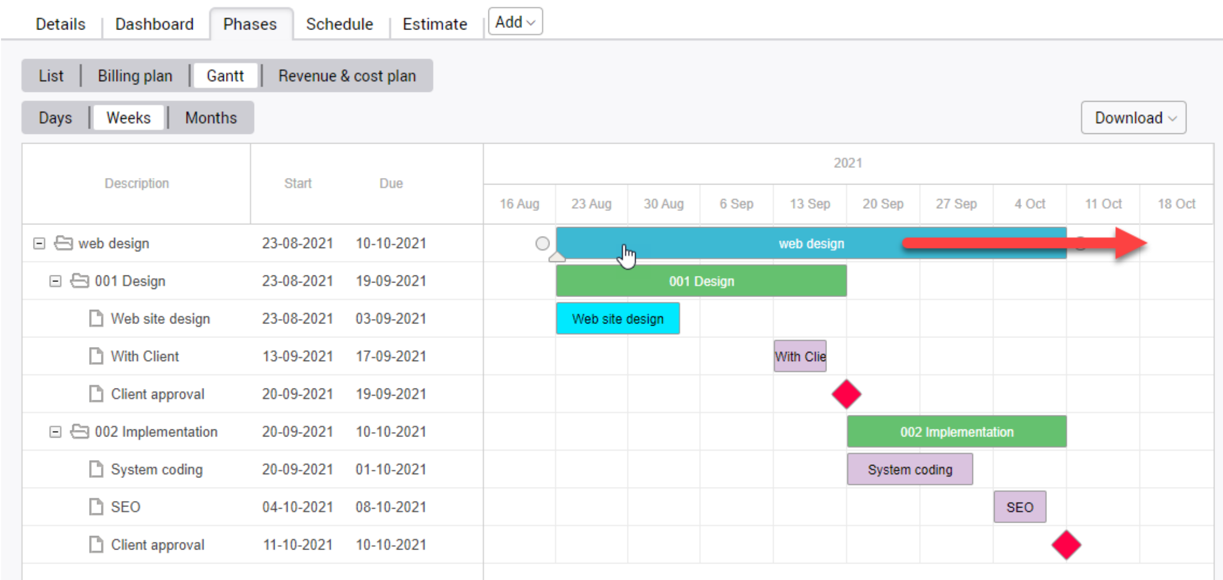


Moving the entire Gantt

Even when your system is using stage driven dates (this is the default setting in Company settings > Advanced tab), you can still move your entire job by dragging and dropping the main job bar of the Gantt.

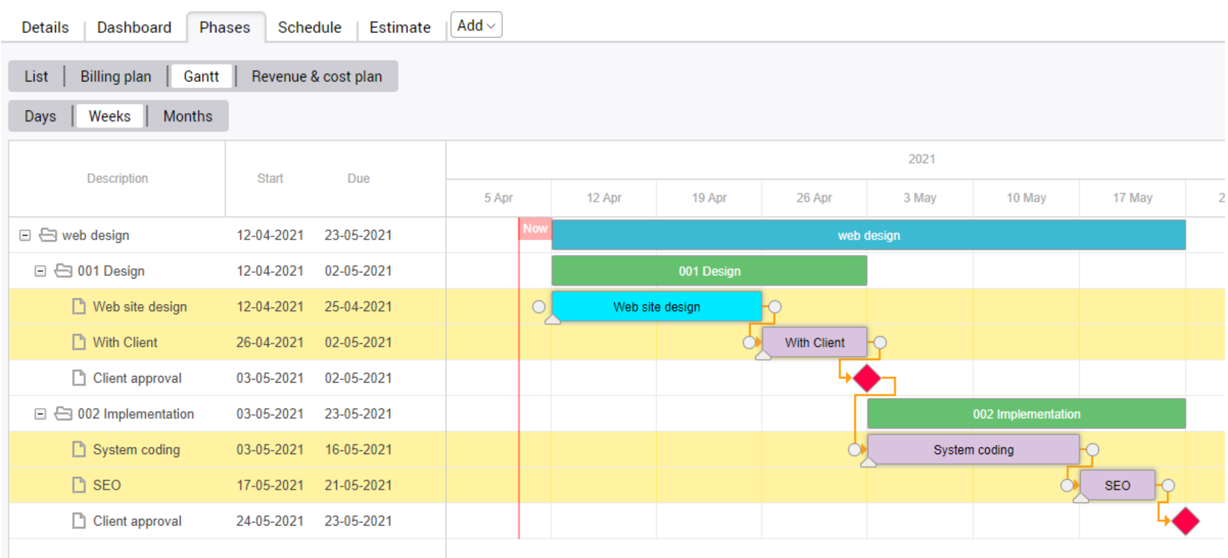
Note: If you have set up dependencies within the Gantt, you can only move the Gantt forward using this technique.

You can also move a single phase using the same method.



Multiselect

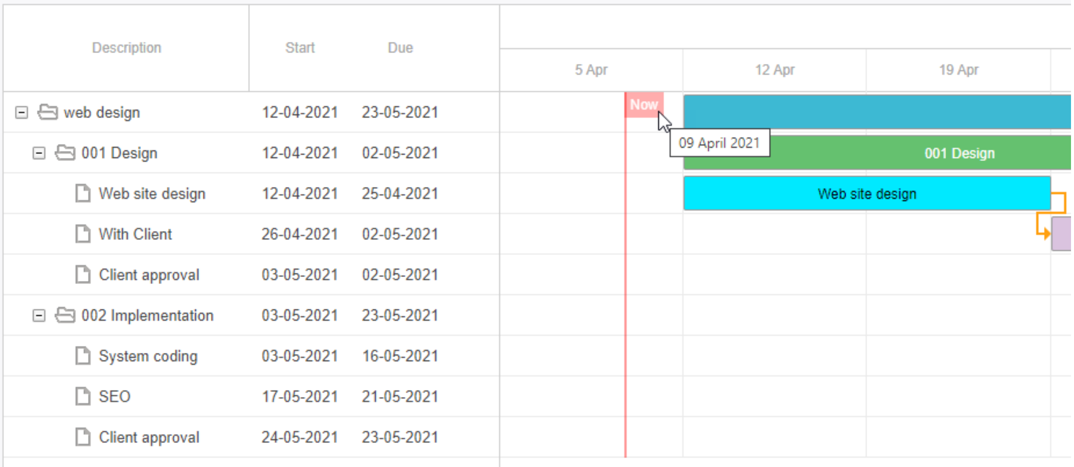
To multiselect, hold down the control key (Ctrl) and click on movable items. Once selected, items can be moved.



Miscellaneous improvements

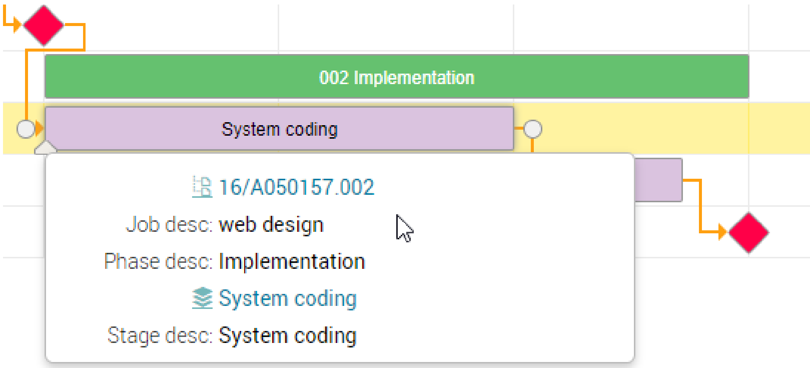
Today line

A vertical flag is displayed to indicate the current date.



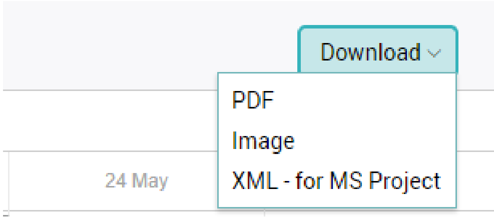
Hovers

Additional information regarding each Gantt item is displayed by double clicking the bar. Clickable items in the hover will open up each entity in a new tab.



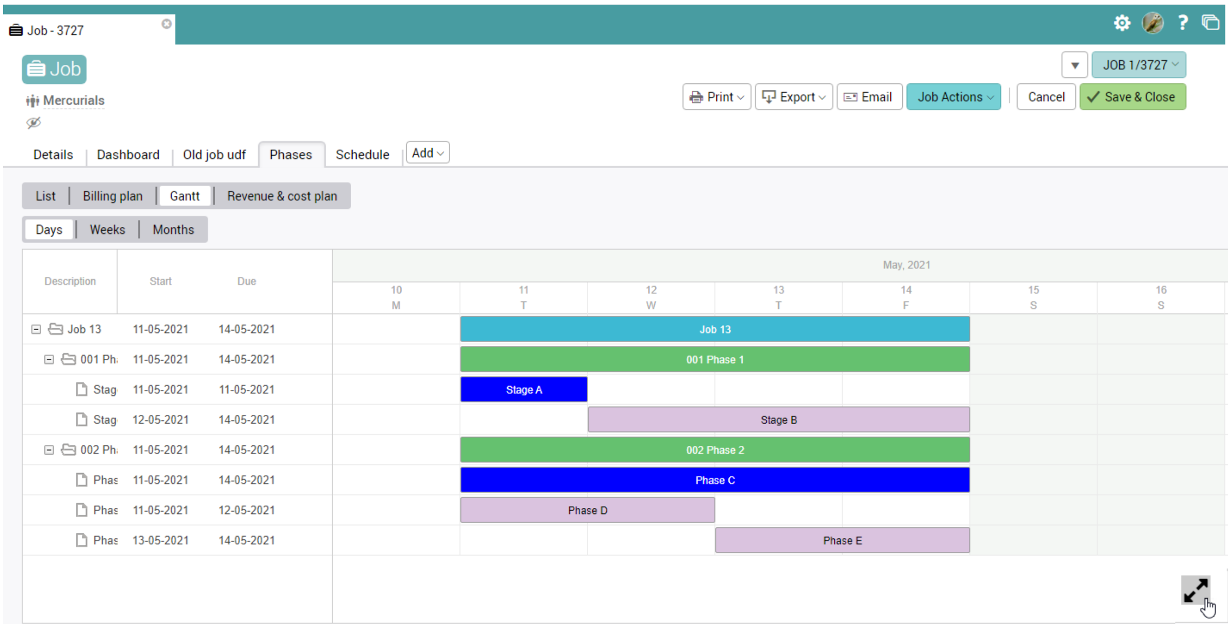
Improved formatting of PDF & Image download

The PDF and Image download options have been re-formatted to create improved images.



Full screen mode

Clicking the resize icon in the bottom right corner of the Gantt chart allows users to work in full screen mode.

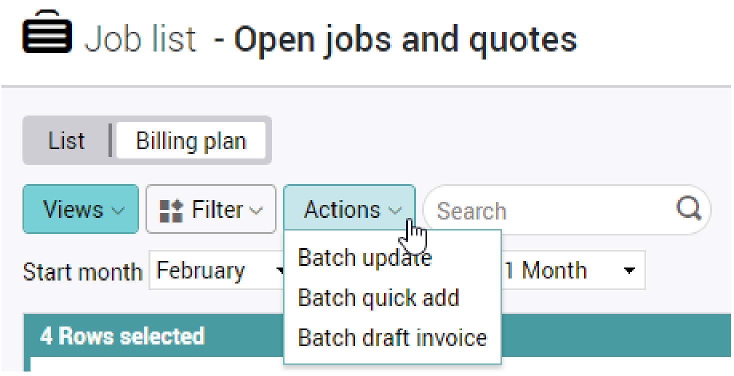


BILLING PLANS

Batch processing of billing plans

Batch processing of billing plans is accessible from the multi-job/phase billing plan. There are 3 new options:

- Batch update
  Lock/unlock a set of billing plans
- Batch quick add
  Quickly create a set of billing plans
- Batch draft invoice
  Invoice a selection of billing plans



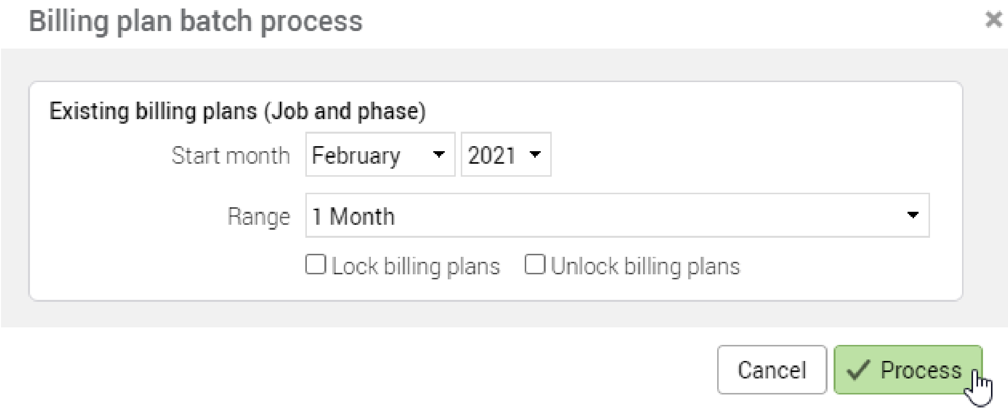
Batch update

To use the ‘Batch update’ feature, first select the Billing plans to process, then from the Actions menu click ‘Batch update’.

Batch update dialog

This feature is used to batch lock/unlock a set of billing plans.

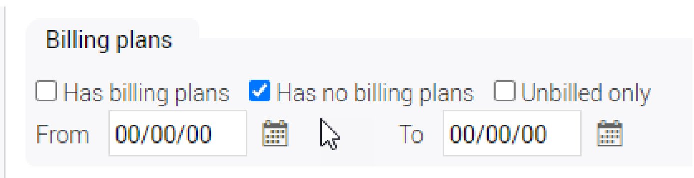
First select the jobs you wish to process, then select a start date and a range to indicate which billing plans for the jobs selected you wish to process. Click ‘Process’.



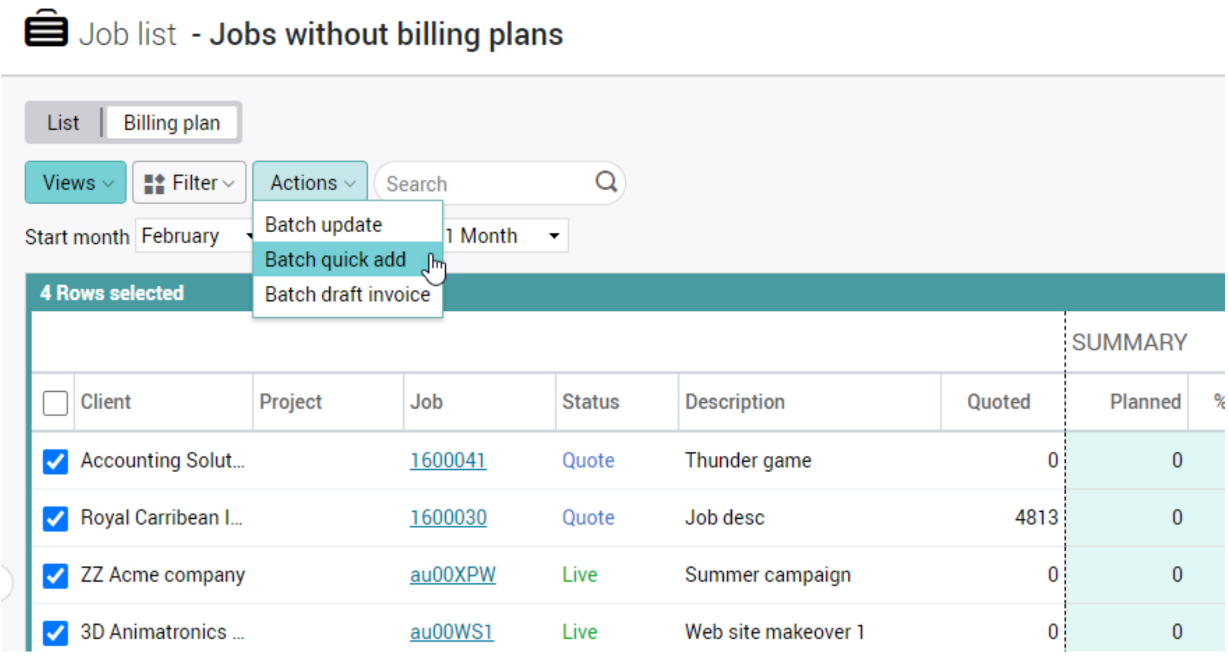
Batch quick-add

This feature is used to create a set of billing plans.

You need to first select the jobs you wish to create billing plans for. The easiest way to do this is to set a filter and then save it as a view. In the filter, make this setting:

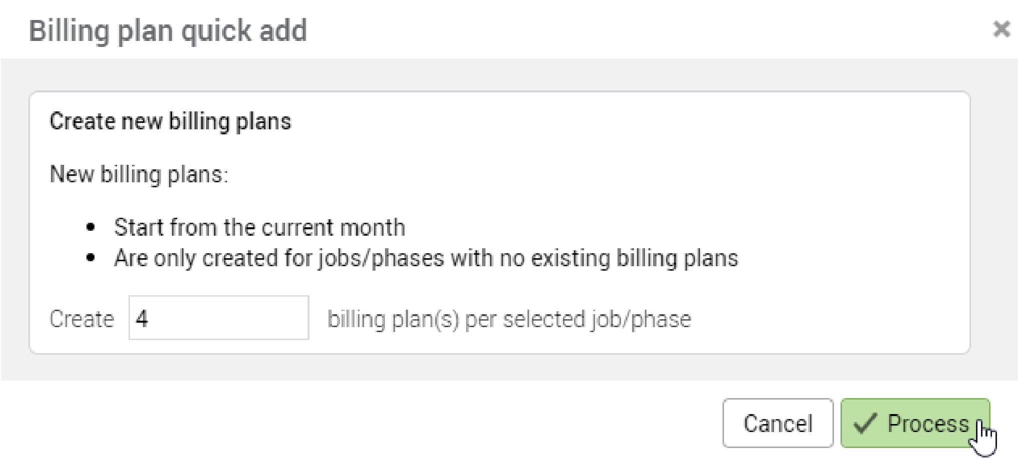


Select the jobs you wish to create billing plans for



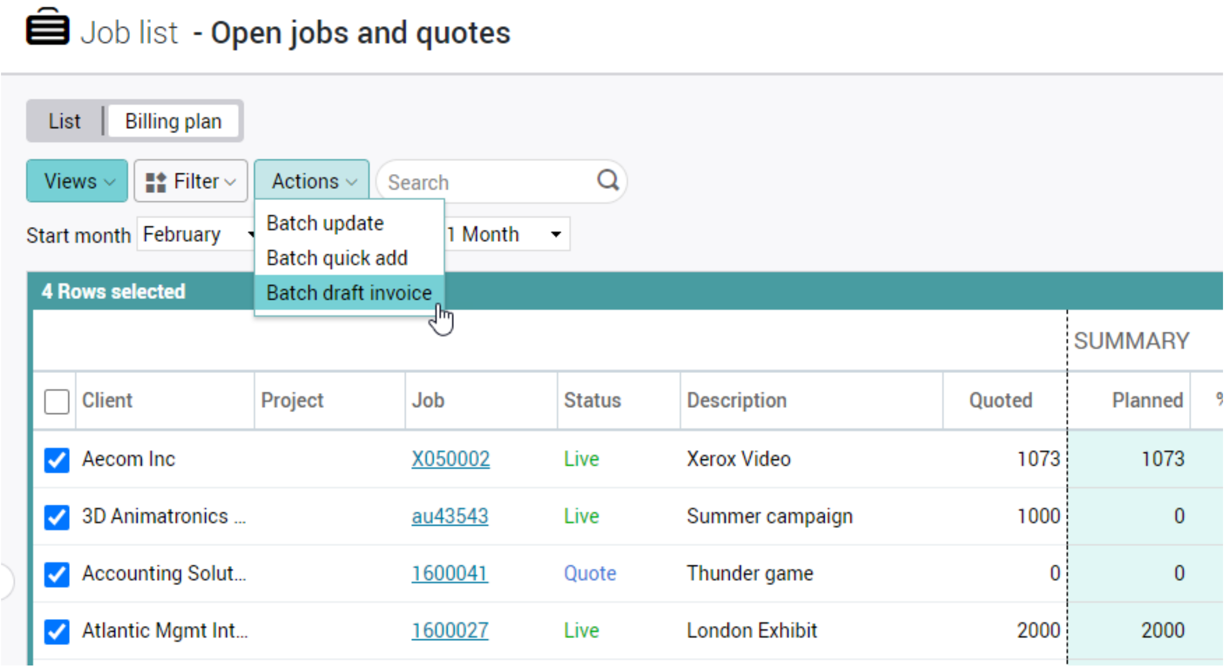
The quick-add dialog

Select the number of billing plans you wish to create for each job/phase.



Batch draft invoice

Select the jobs/phases you wish to invoice, then from the Actions menu click 'Batch draft invoice'.



The batch draft invoice dialog

The standard batch draft invoicing dialog is then displayed.

- Single / multi job
  Single – one invoice per job/phase
  Multi – jobs are consolidated into a single invoice per client

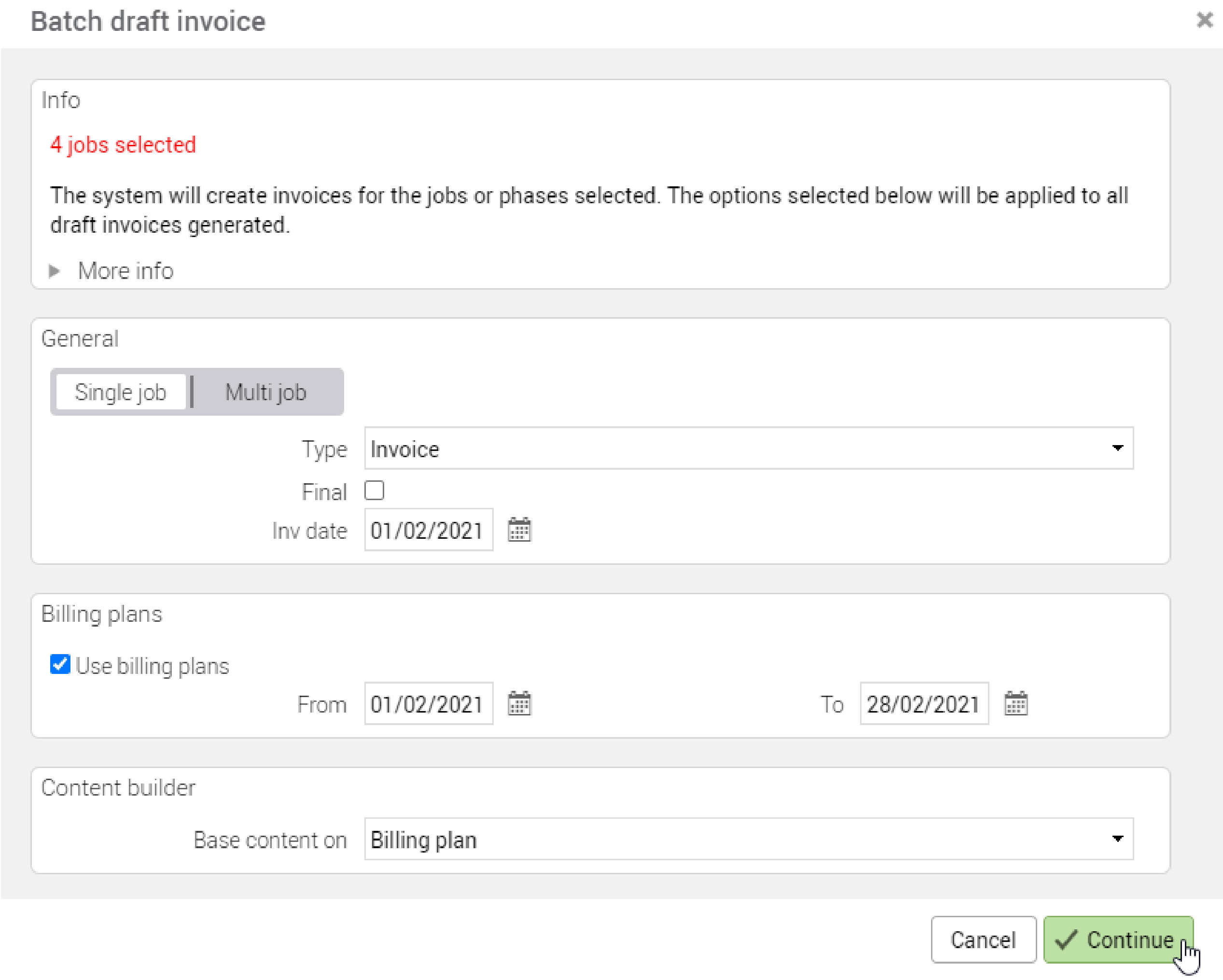
- Type
  Invoice / credit / write off

- Final / part invoice
  Final invoice will close the job once it is made real

- Invoice date

- Billing plans – date range
  Range of billing plans you wish to bill
  This is typically a single month

- Content
  Billing plan
  Pro-rata quote



NEW BUSINESS FEATURE

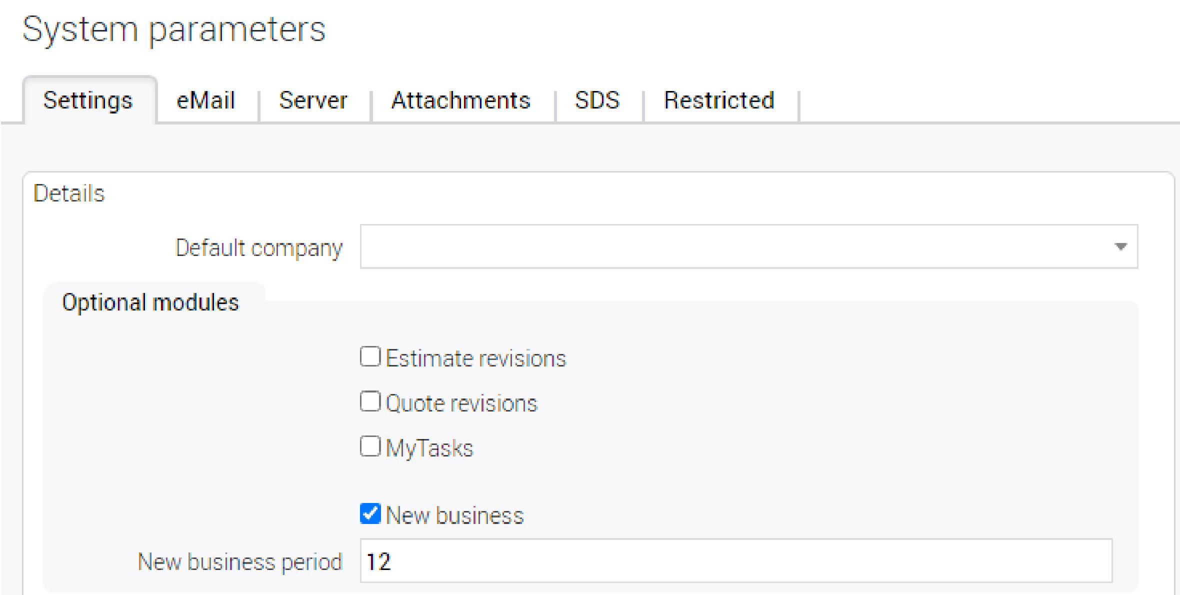
New business / repeat business

It is common practice to pitch for and win new customers. Typically for a period after winning a new customer, all jobs raised are considered 'New Business' and following that period, subsequent jobs are considered to be 'Repeat business'.

This new feature provides a 'New Business / Repeat business' status on both clients and jobs, and provides ways of updating these statuses by applying business logic.

Switching on this feature

The 'New business' feature is activated in Utilities > System parameters. By default, the 'New business' period is set to 12 months. If you wish to have a different 'New business' period, it is important to set this immediately before any batch updates are run to set up your data (see below in the batch updates section).



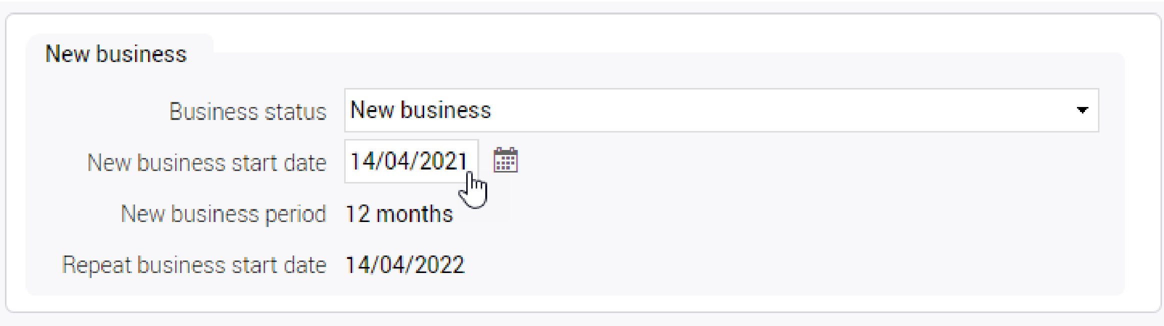
Business logic

There are two key fields that control the behaviour of this feature:

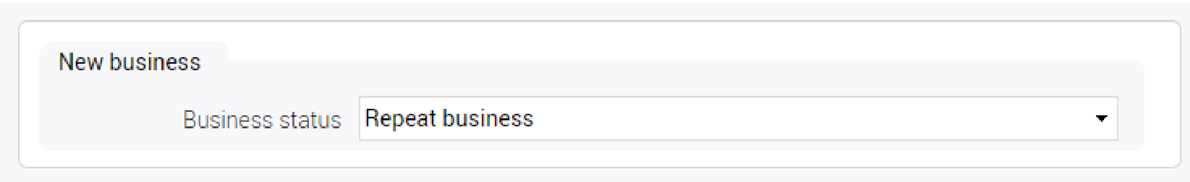
- Client 'New business start date'
- Job 'Business status'

Client 'New business start date'

The 'New business start date' is the date the client was won. Typically, the date a prospect was promoted.



If a client is manually changed to be 'Repeat business', the 'New business start date' is set to 00/00/00 and hidden from the UI.



Setting the 'New business start date'

Leads and Prospects

The 'New business start date' is set to 00/00/00 and hidden from the UI

- No business status is shown on prospect cards
- The 12 month 'New business' period does not start until an opportunity is created for the prospect, or when the prospect is promoted to a client
- Any opportunities created for prospects are set as 'New business'

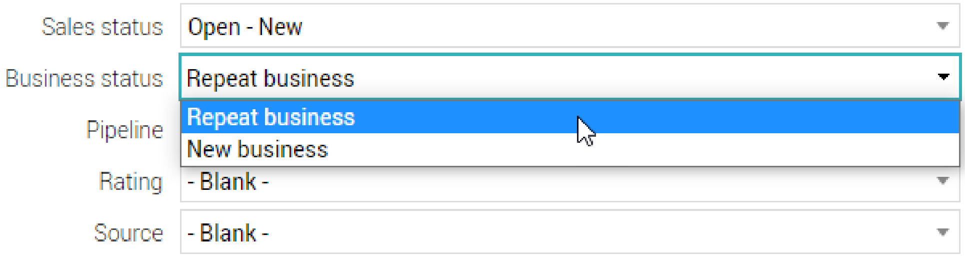
Promoting a prospect

Promoting a prospect to a client will start its 'New business' period. On the client card there is a section that shows this status and the key dates that will be used to determine when the 'New business' period ends.

Job 'Business status'

The Business status field has two possible values:

- Repeat business
- New business



This field can be manually set by the user. However, this is normally set automatically on creation of the opportunity / job, based on the New business status of the client.

Batch update

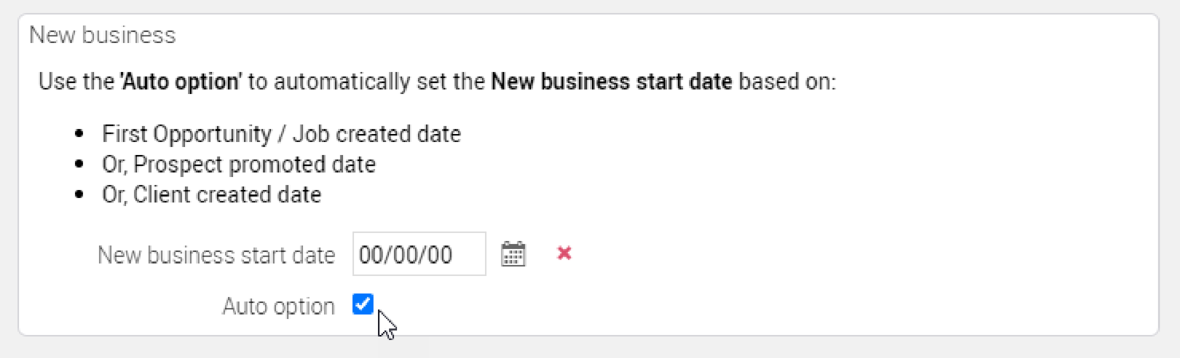
The following batch update features can be used to set-up the 'New business' feature.

Note:
On upgrade:

- All existing Leads/Prospects/Clients have the 'New business start date' set to 00/00/00
- All jobs are set to 'Repeat business'

If you wish to use this feature, it is necessary to run batch updates to set the New business status for existing clients and jobs.

Client batch update



Options:

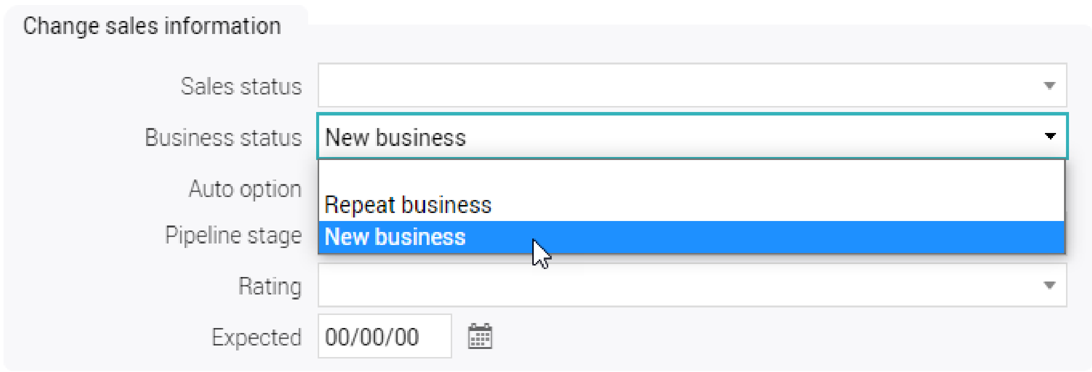
- **Date entry**
  Use the date entry to force the client to have the selected 'New business start date'. Please note that Leads and Prospects will be ignored.

- **Auto option**
  Use the 'Auto' option to automatically set the 'New business start date' based on:
  - First Opportunity/Job created date
  - Or if there are no jobs, Prospect promoted date
  - Or if it was never a prospect, Client created date

Note: If the calculated 'New business start date' is more than a year in the past (assuming the new business period is 12 months), the client's 'New business start date' is set to 00/00/00 and the client is set to 'Repeat business'.

Job batch update

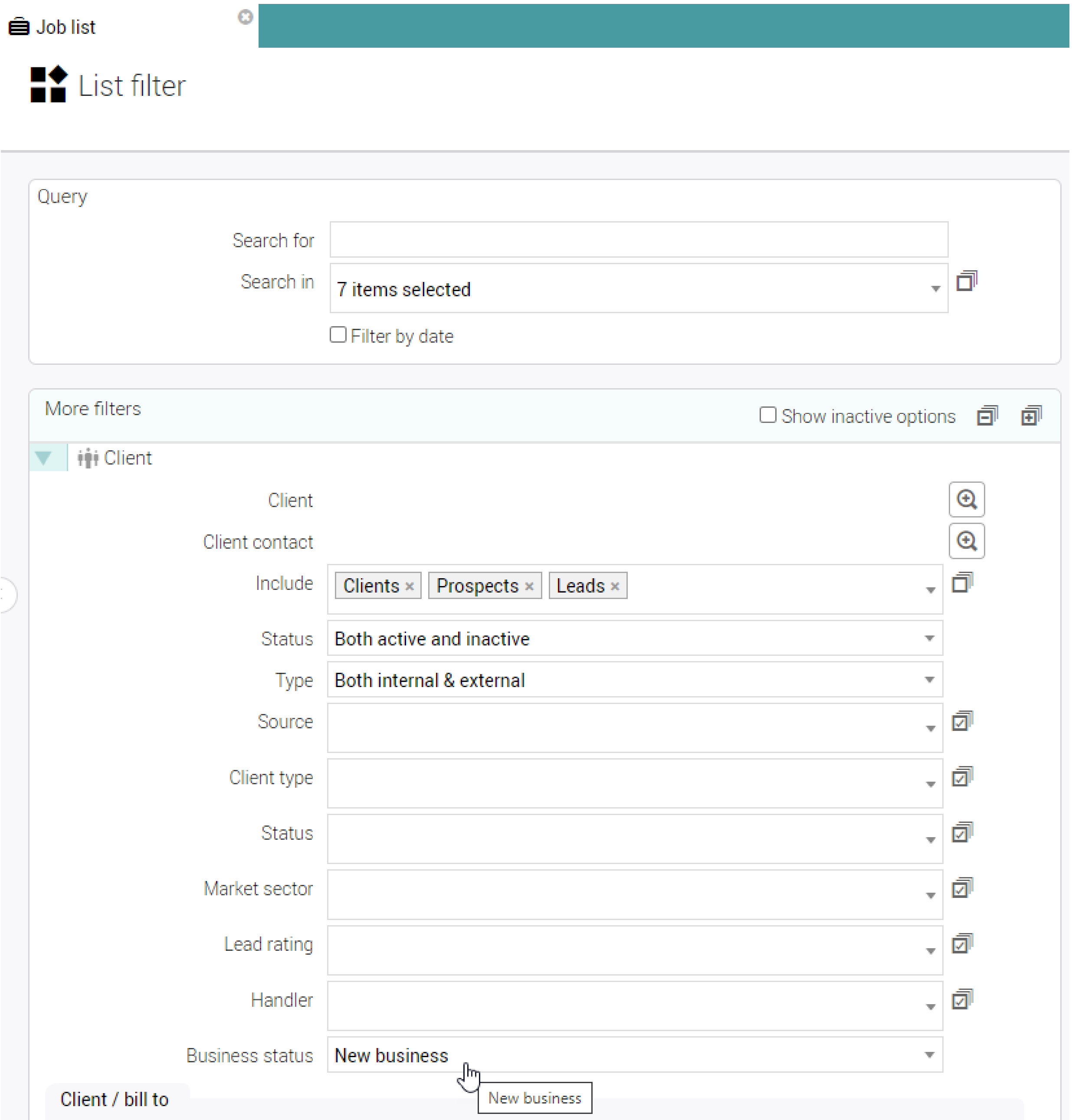
Using the job batch update, it is possible to set a selection of opportunities/jobs to a 'New business' or 'Repeat business' status.



Setting up an existing system

If you are setting up your existing system to use this feature, you would use the client batch update to set the New business status for all your clients.

You can then select all opportunities and jobs that belong to New business clients and set their statuses to 'New business'. You can do this using this filter prior to the job batch update.



Reporting on 'New business'

Reports

Filters

Filter on 'New business' / 'Repeat business'
(At job level or client level)

Exports

Exports of the following reports display the New business status:

- Period profit
- Job / phase profitability
- Cost & quotes
- Job / phase report
- Client export

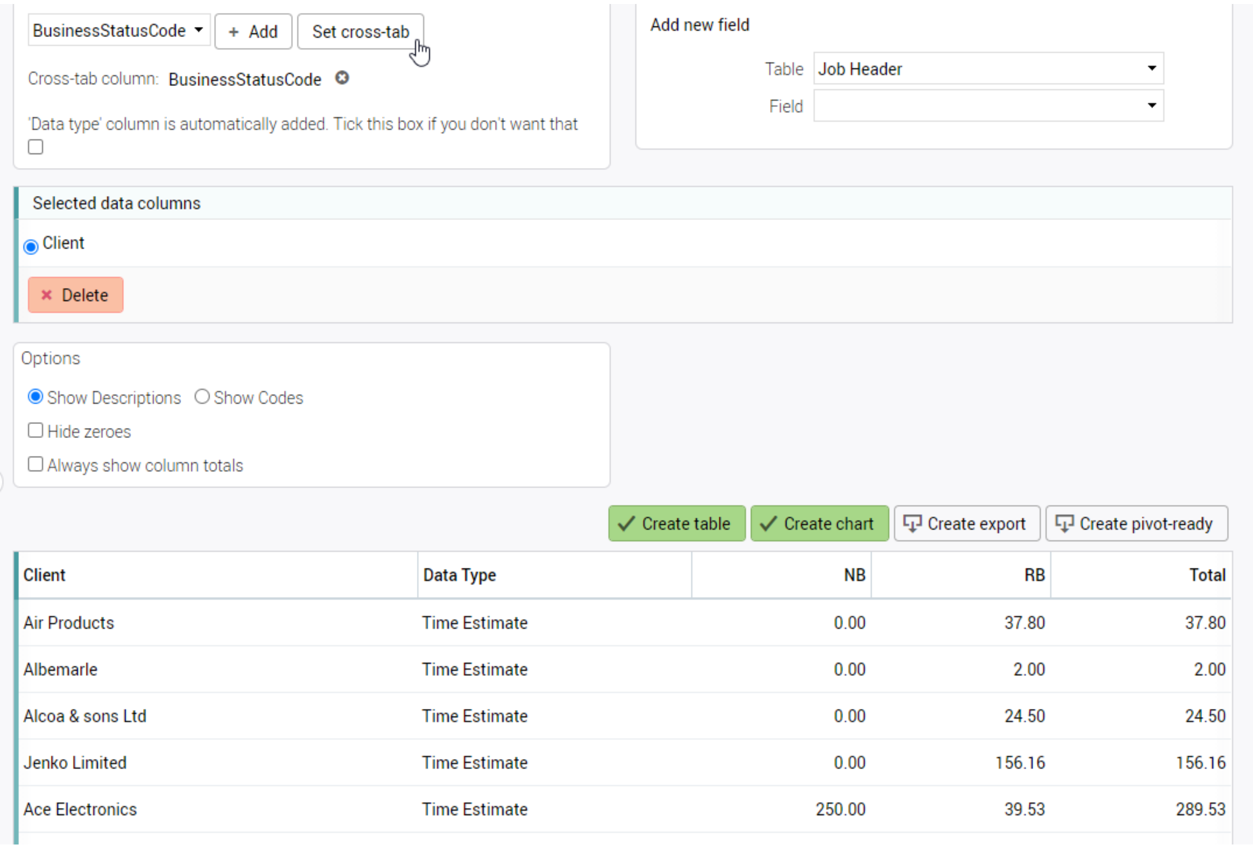
Data viewer

Filters

Filter on 'New business' / 'Repeat business'
(At job level or client level)

Cross tab DV views

Cross tab DV views can be created that have NB/RB set as columns



Client	Data Type	NB	RB	Total
Air Products	Time Estimate	0.00	37.80	37.80
Albemarle	Time Estimate	0.00	2.00	2.00
Alcoa & sons Ltd	Time Estimate	0.00	24.50	24.50
Jenko Limited	Time Estimate	0.00	156.16	156.16
Ace Electronics	Time Estimate	250.00	39.53	289.53

Import / Export of client prices

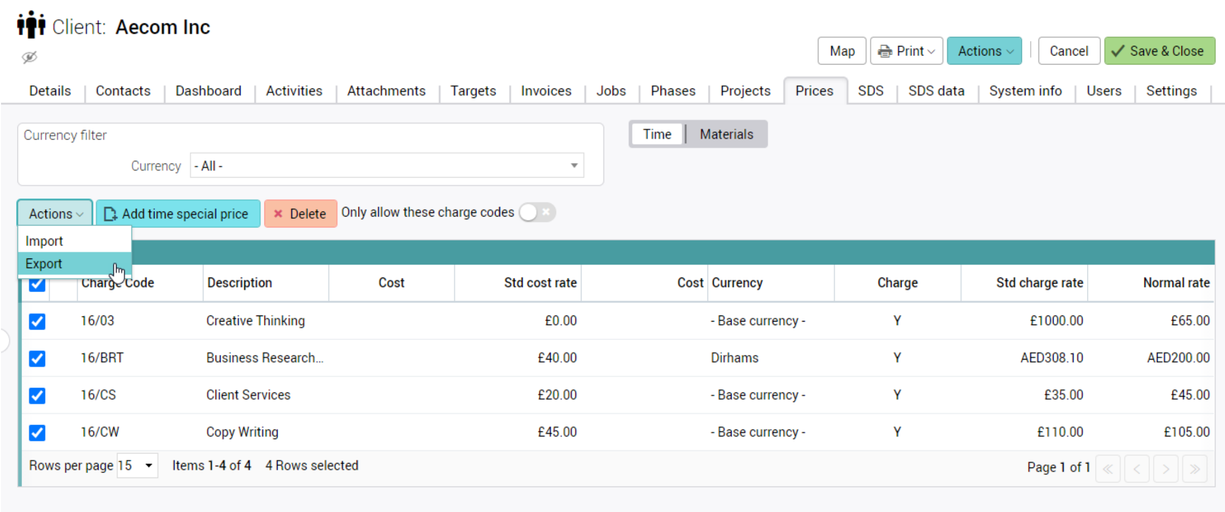
Users can set up special prices for Time and Material charge codes for individual clients.

For instance, the 'Artwork' charge code might be set up to normally be charged out at £100 per hour. You may however negotiate a special price for a different client at £90 per hour.

We have added a useful utility to this feature whereby the user can export out these special prices, manually update the prices in a spreadsheet and then re-import the updated prices. It is also possible to import the same prices table into other clients who share a similar price band.

Exporting client prices

Click Actions > Export to export the table of prices.



The export generates a .CSV file which can be opened in a spreadsheet.

Note: Excel will automatically change the values in CSVs. We would suggest another CSV editing tool is used for this procedure.

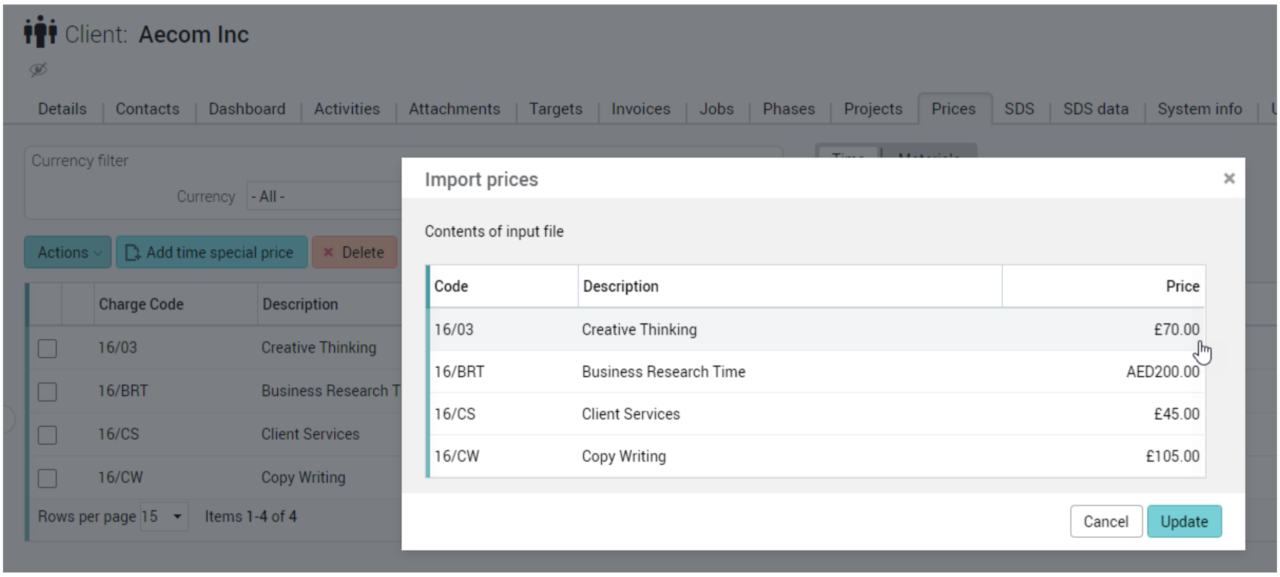
The only fields you should update are the fields in the 'Charge Rate' column.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Type	Charge Rate	Codes	Overtime 1 Charge Rate	Overtime 2 Charge Rate	Client Code	Cost Rate	Costs ?	Currency Code	Discount %	Prices ?	Description
2	TIME	65	16/03	0	0	16/P0284		FALSE		94	TRUE	Creative Thinking
3	TIME	200	16/BRT	0	0	16/P0284		FALSE	16/AED	35.09	TRUE	Business Research Time
4	TIME	45	16/CS	0	0	16/P0284		FALSE		20	TRUE	Client Services
5	TIME	105	16/CW	0	0	16/P0284		FALSE		20	TRUE	Copy Writing
6												

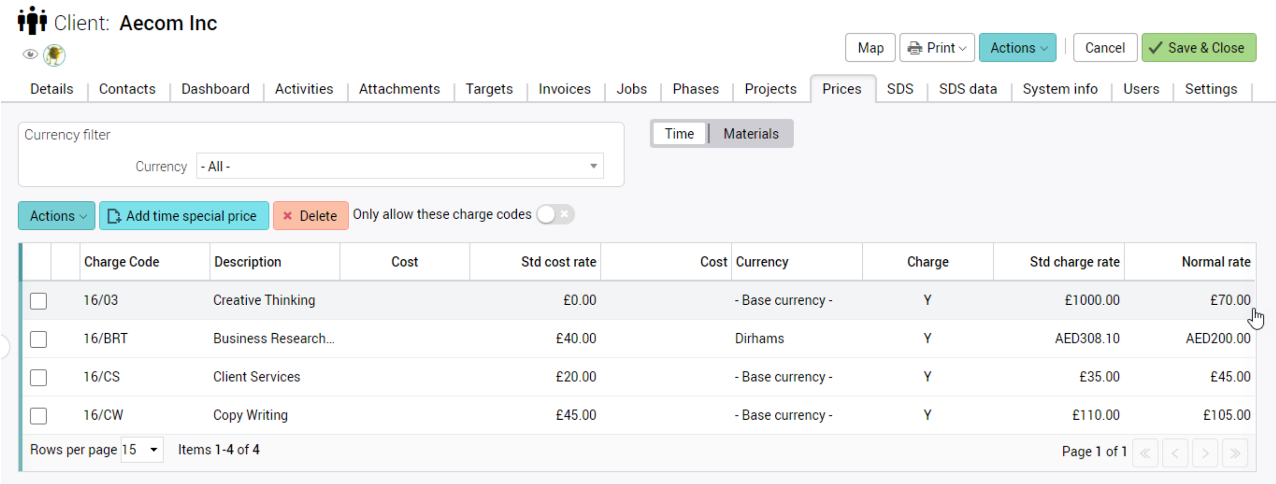
In the following example, the charge rate has been changed from 65 to 70.

	A	B	C
1	Type	Charge Rate	Codes
2	TIME	70	16/03
3	TIME	200	16/BRT
4	TIME	45	16/CS
5	TIME	105	16/CW

Importing prices
Save the table as a CSV (do not change the format) and import the file back into the client record using the 'Actions > Import' option.



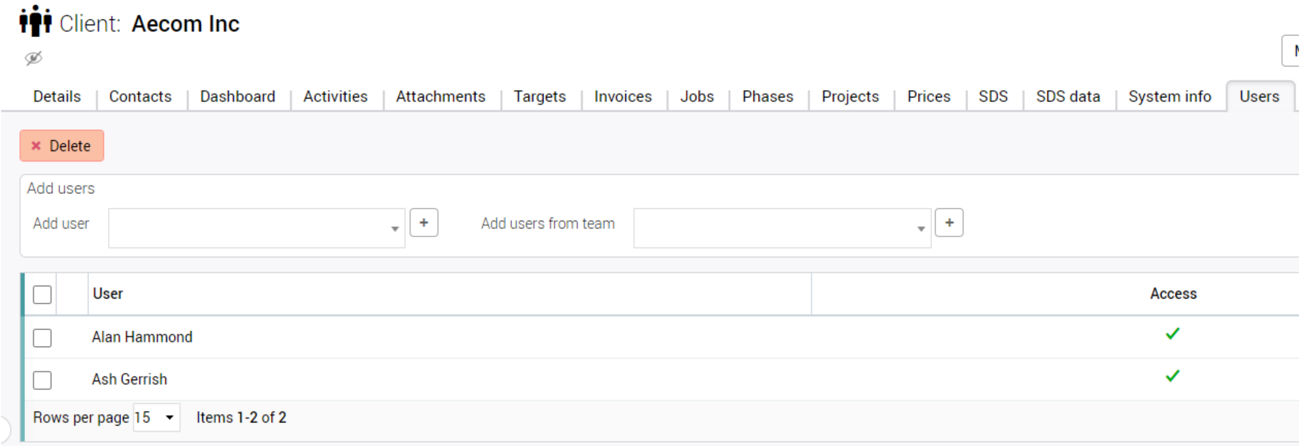
Note: You can import these same prices into other clients, too.



Restricting users to certain clients

Restricting user access to clients

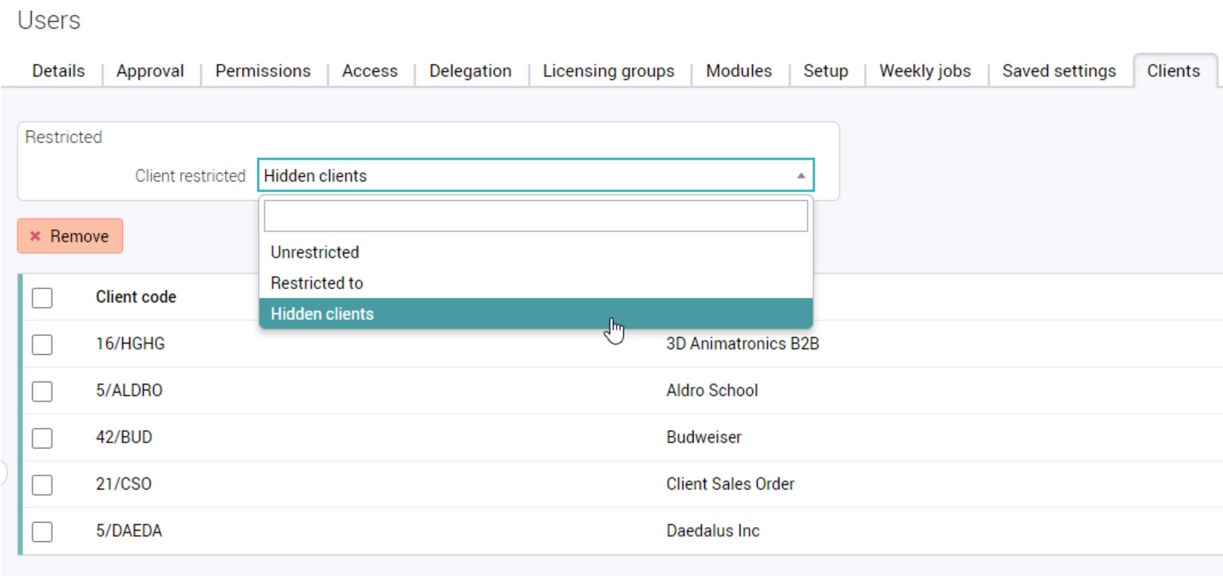
Currently, users can be restricted to only having access to a certain set of clients. This is achieved by adding the user (or user's team) to the client via the Client > Users tab. Users then only have access to the clients that they have been added to.



Although this is a useful feature, in some scenarios it would be easier to allow users to have access to all clients, but with certain clients restricted. This new feature supports this method of working.

To work using this method, select 'Hidden clients' on the user record 'Clients' tab.

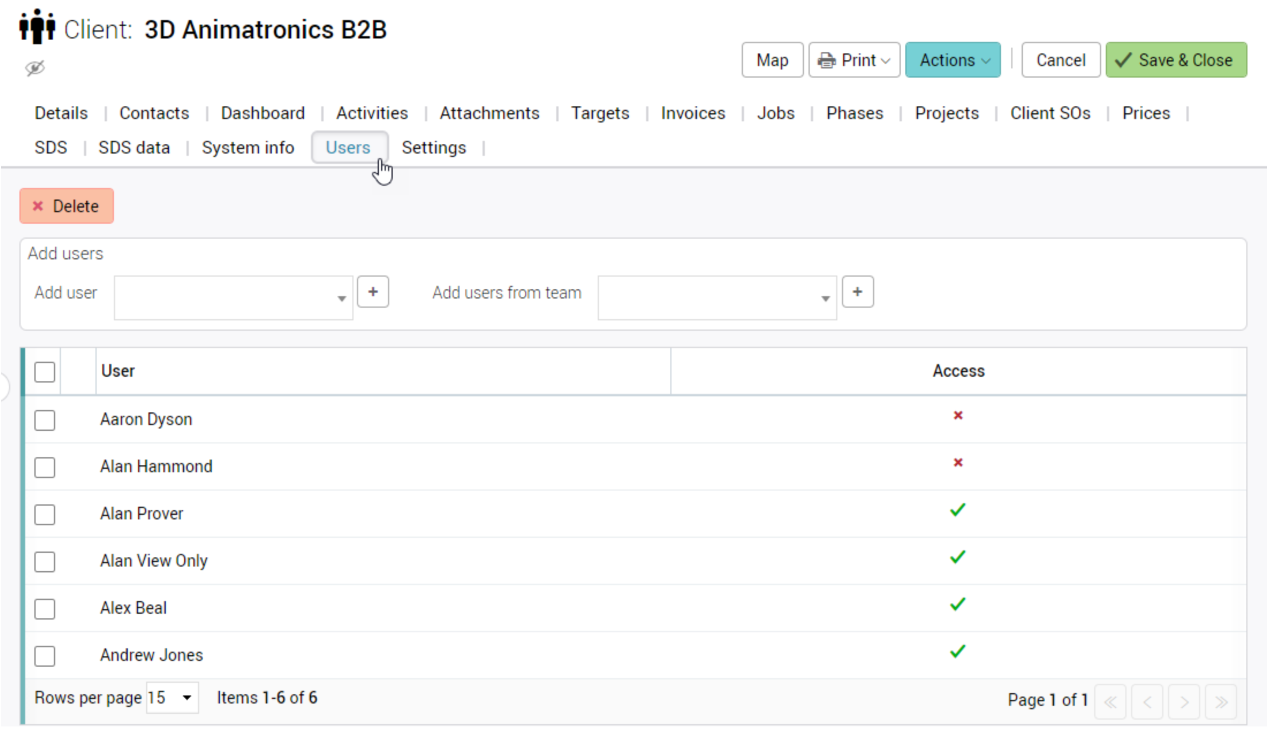
Hidden clients



Client card

On the 'Client > Users' tab, there is a list of any users that have access to this client. Any users not in this list are assumed to have access by default.

If the new feature detailed above is being used, any user that has been set to 'Hidden clients' will also be shown in this list. However, the 'Access' column will not be ticked – indicating that the user does not have access to this client.



DASHBOARDS

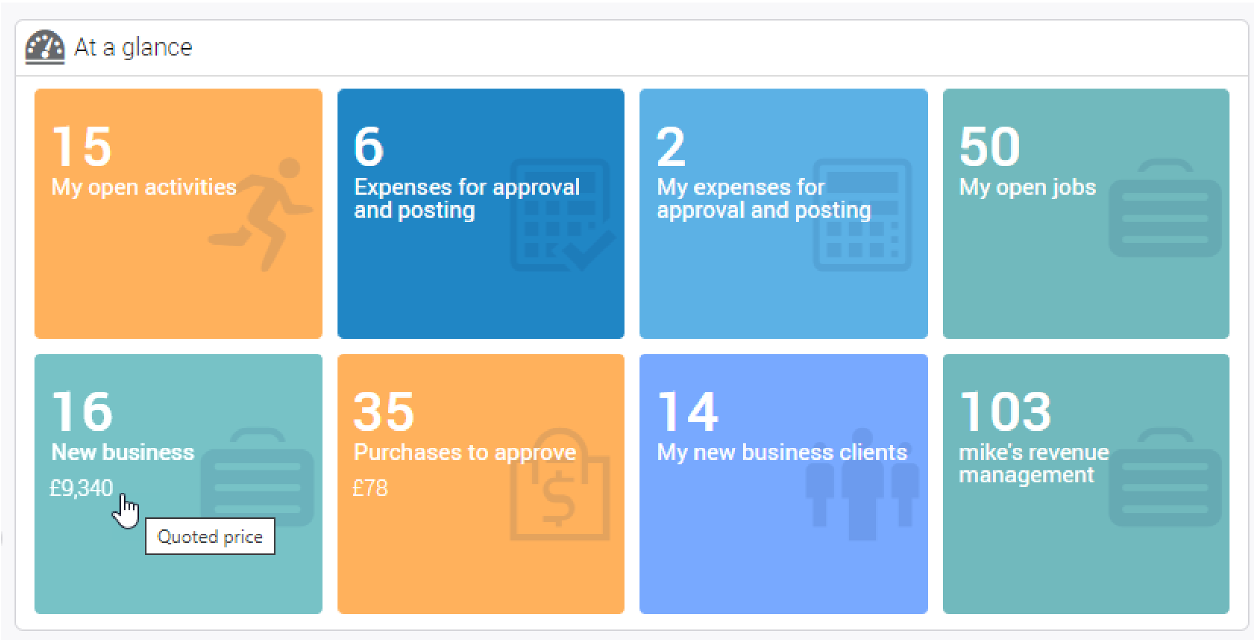
At a glance – Personal dashboard

'At a glance' is a new section that has been added under Personal dashboards.

This feature is designed to give the user a summary of areas of the product that are key to their role. A set of coloured panes are displayed and each pane contains the following info:

- A count
- A description
- A value (optional)

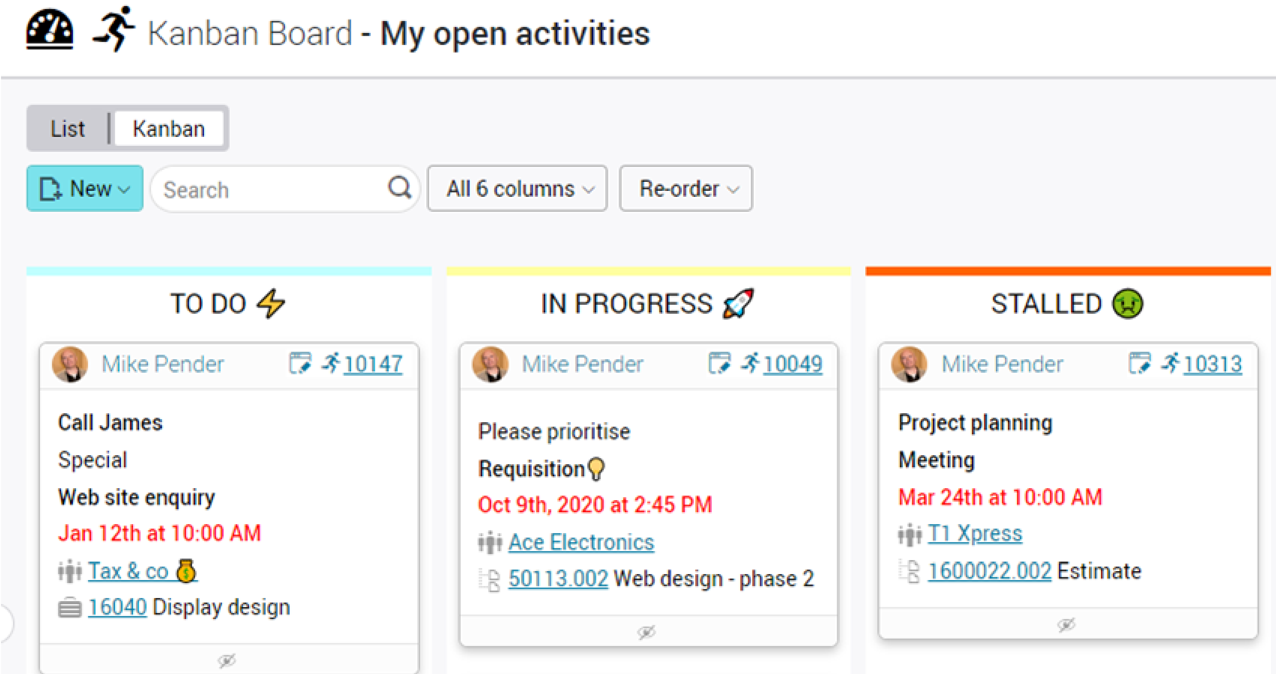
If the user clicks on one of these panes, a new tab will open displaying a list of all the associated records. In the case of activities, this can also be a Kanban.



Clicking on a pane

Clicking on the first pane 'My open activities' - the Kanban opens displaying the user's 'open activities'.

Two icons appear to the top left of the heading – in this example, the dashboard icon and the activities icon. The description is as shown in the 'At a glance' dashboard. A list / Kanban board opened from a dashboard is a special type that has a fixed view. This keeps it separate from other lists / Kanban boards, that may already be open.



Adding 'At a glance' views to your Personal dashboard

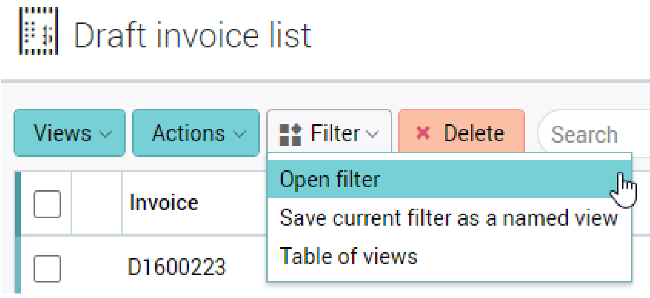
On upgrade, all users get the following panes added to their personal dashboard:

- My open activities
- Expenses for approval and posting
- My open jobs

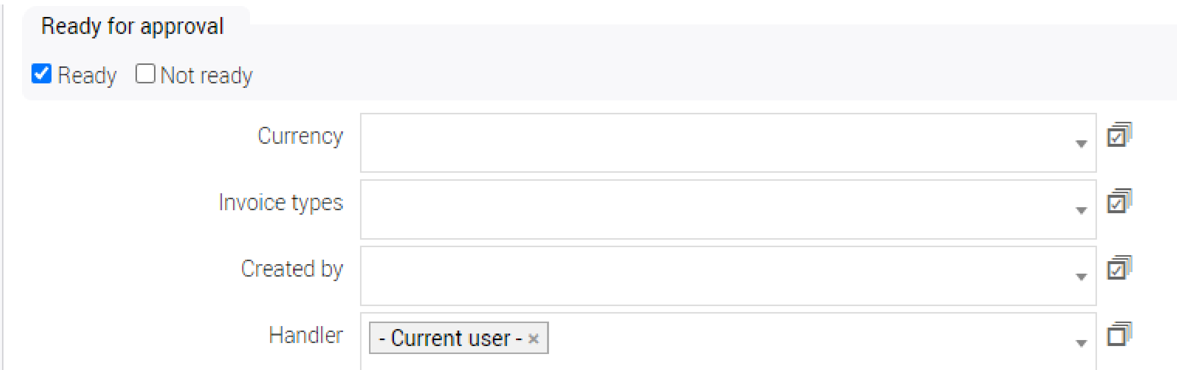
These panes are generated from system views. To create additional 'At a glance' panes, simply use existing views or create new views and add to the Personal dashboard.

Creating and saving a filter as a named view

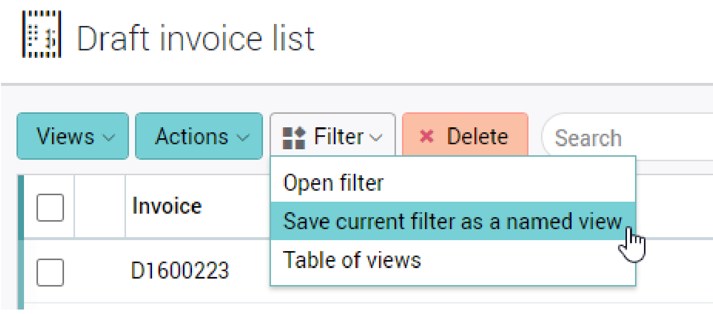
Supposing you wish to create a view that lists all draft invoices requiring approval for each handler. Firstly, you need to use the Draft invoices filter to create the view.



Inside the filter, select 'Ready' (for approval) and assign the current user as the handler. This option will filter the list of draft invoices to whoever is logged in.



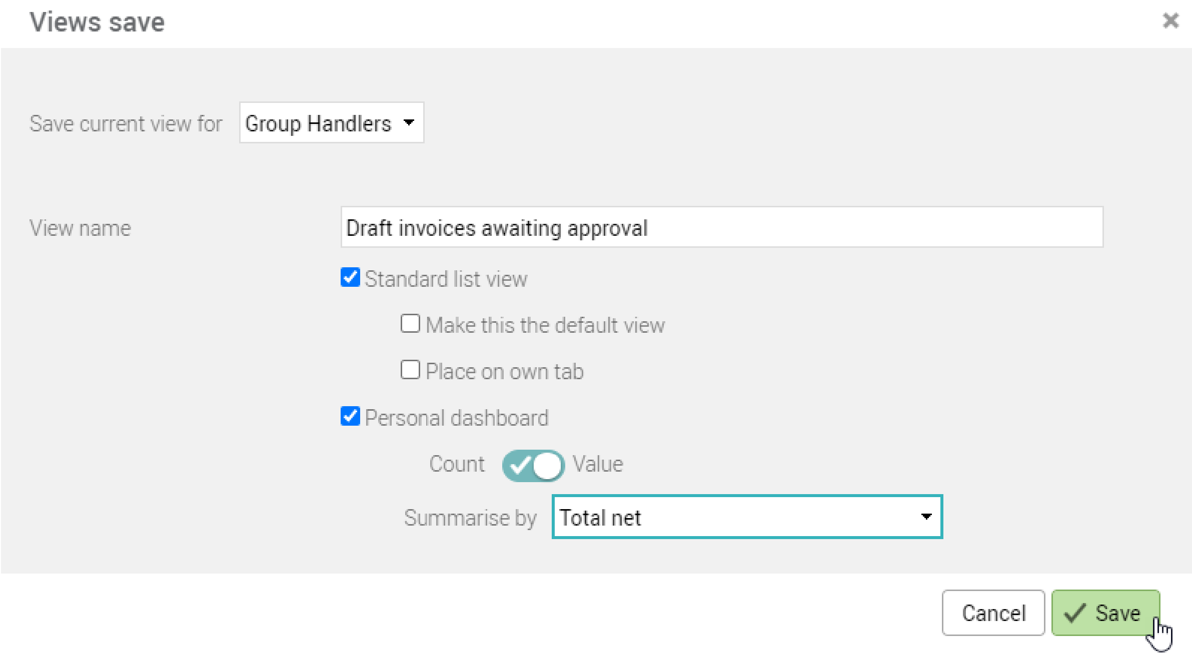
Apply the filter then 'Save current filter as a named view'.



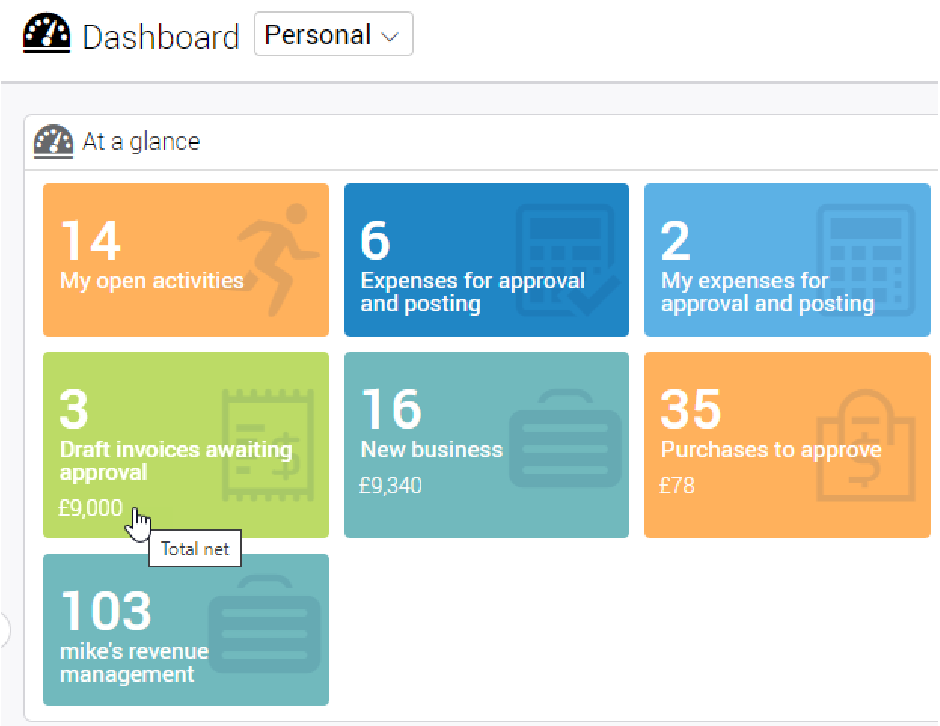
'Save filter as a named view' dialog window

The dialog window now has an additional option – 'Personal dashboard'. Selecting this option will place the newly created view in the 'At a glance' section of all the users who are in the user group 'Handlers'.

If the table for the view, in this example 'Draft invoices', has associated numeric fields, you can also select the field you would like to see totalled.

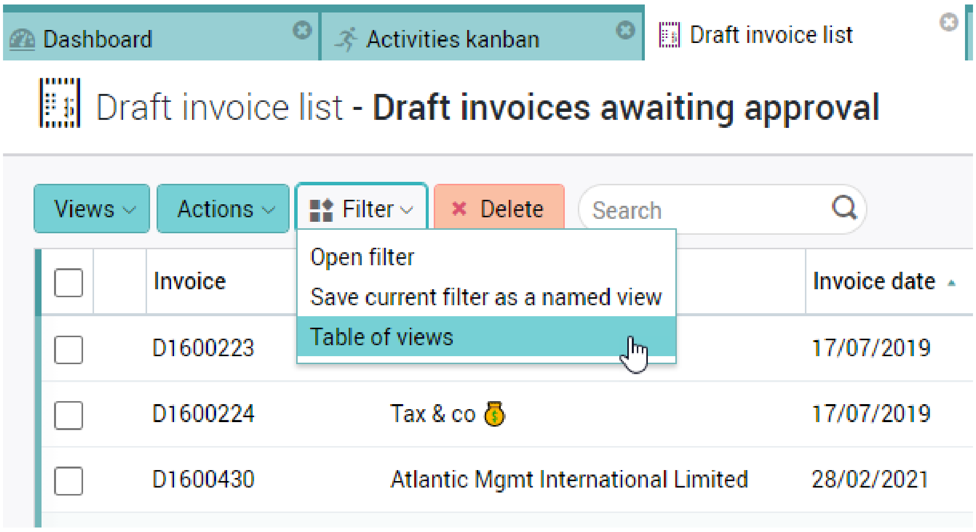


The resulting 'At a glance' pane



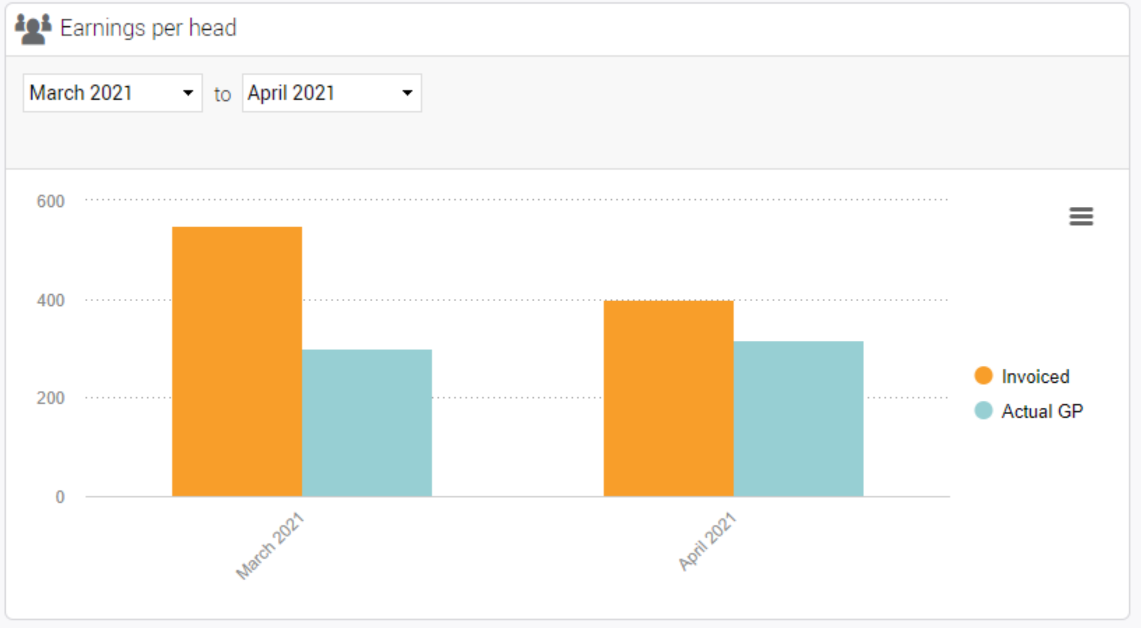
Amending a view

To modify or delete a view, select the 'Table of views' option from the Filter button list of options. This will list all the views you have access to.



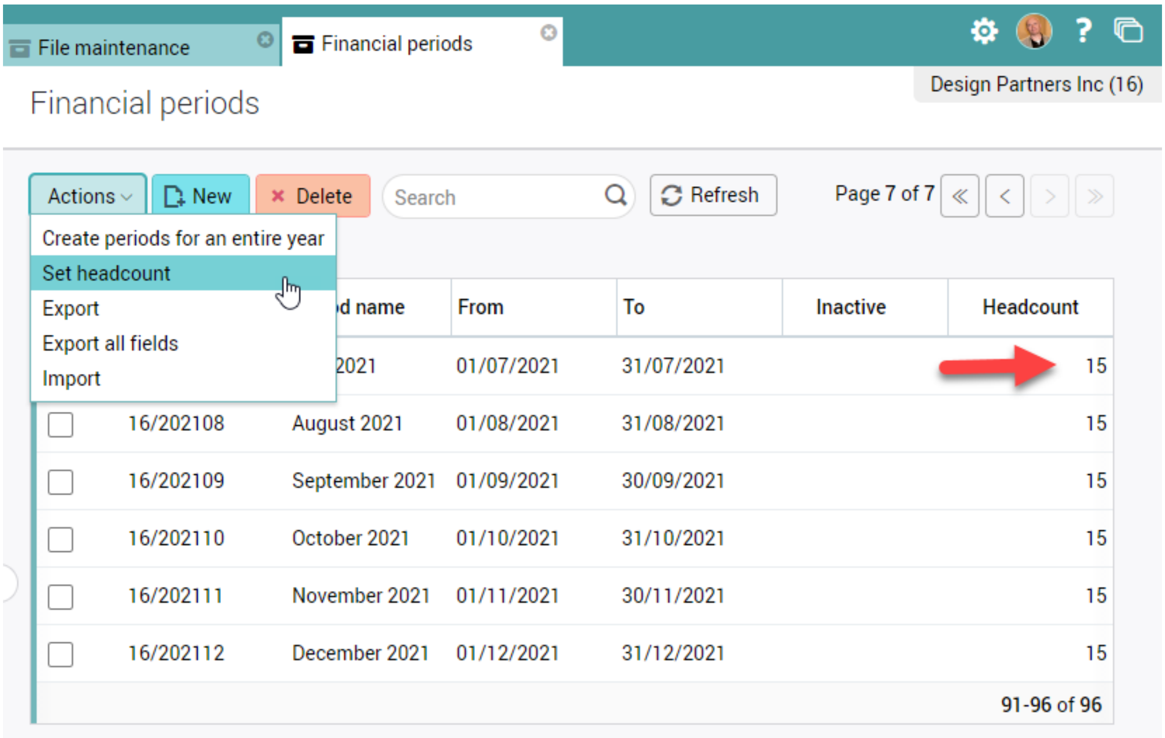
Earnings per head

This new chart can be found on the Management dashboard. It displays the standard metric 'Earnings per head'. The columns displayed are calculated by taking the company monthly turnover and gross profit, and dividing this by the number of full-time staff working for the company. This headcount is stored against financial periods.



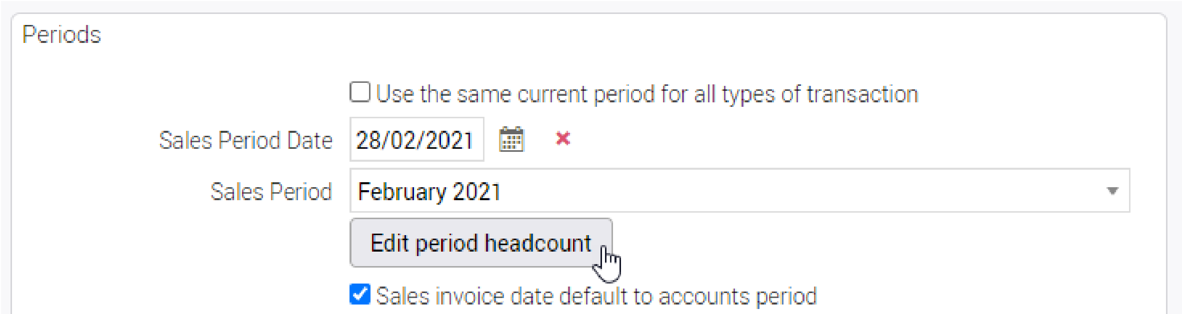
Financial periods

The number of full-time staff (headcount) is recorded against each financial period. This number can be set when creating a new set of periods. You can also update one or more periods using the Actions button.



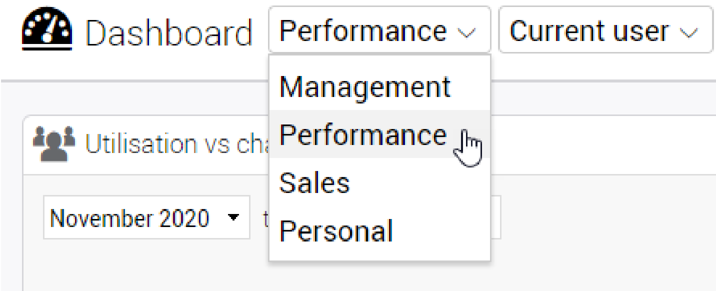
Updating the current period

If you are using accounting periods to control sales and purchasing, you can also update the headcount total on a monthly basis at the time you change the current period in Company settings.



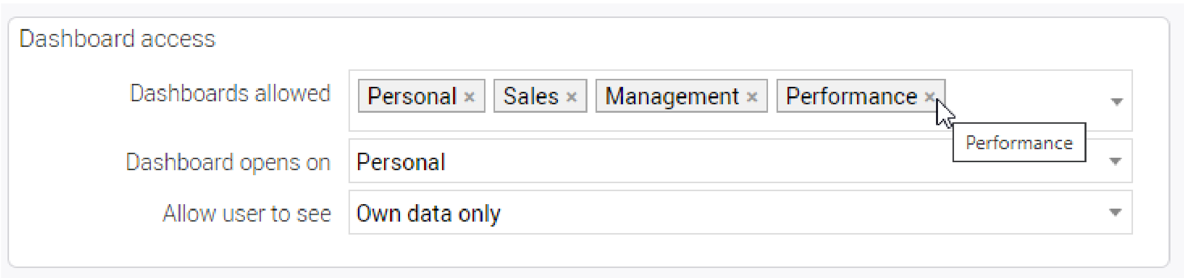
Performance dashboard

A new set of dashboards has been added – 'Performance'.



Access rights

Users can be given access to this new set of dashboards via File maintenance > Users > Access tab.



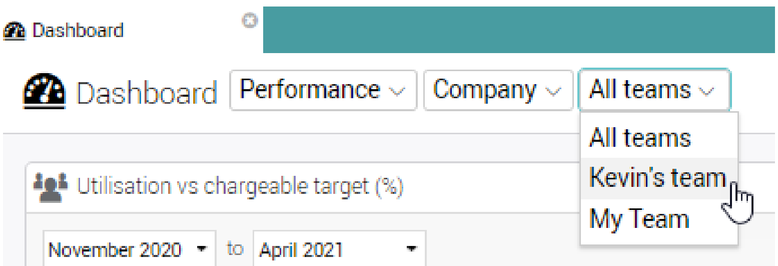
Performance charts

This new selection of dashboards has 3 new charts and 1 chart that has been moved from the Management dashboard group.

All these charts use the chargeable targets that can be optionally set up for each member of staff. These targets are then compared with timesheets posted. All charts display the data over a period of 6 months by default. The charts break the values down into 6 monthly periods – with the exception of the summary chart.

Summarizing by team

All these charts can be summarized by team using the team selector at the top of the dashboard (access rights required).



Charts displayed

Utilization vs chargeable target (%)

- Displays the target achieved as a %

Staff utilization summary

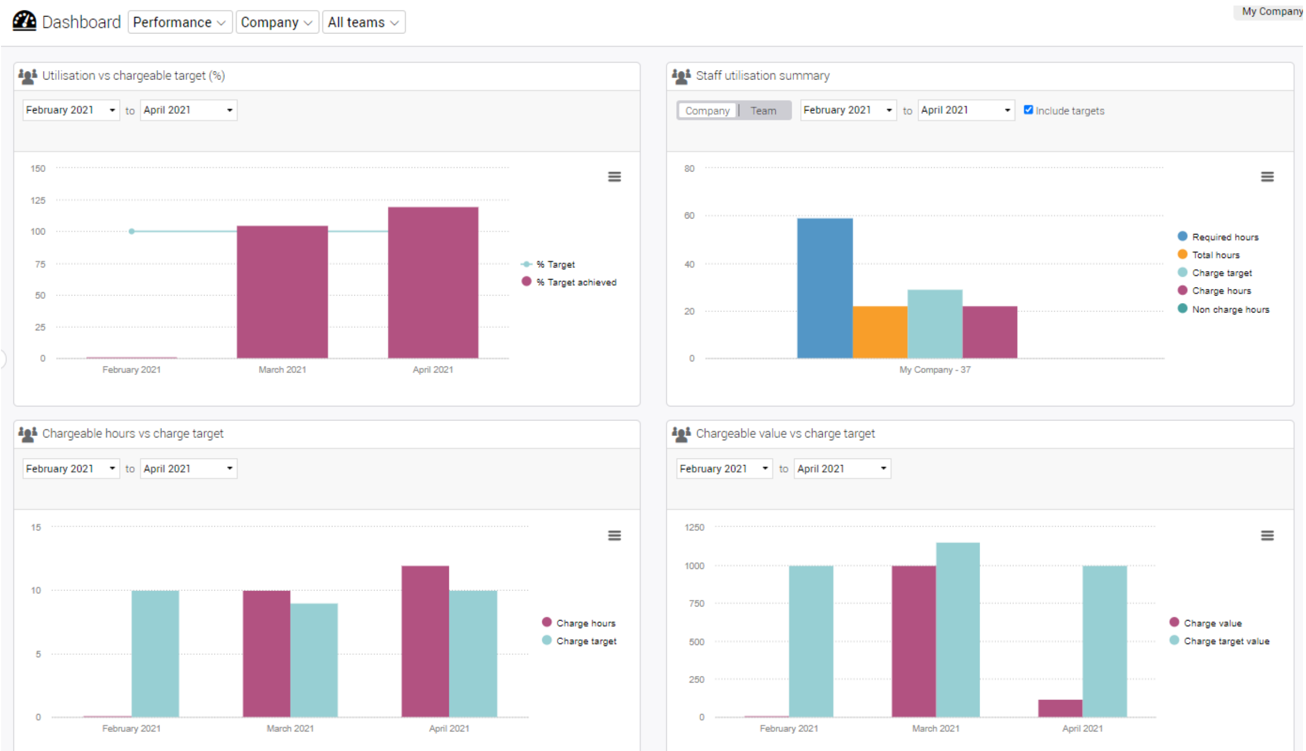
- Previously displayed on the Management dashboard
- Previously named 'Staff utilization'

Chargeable hours vs charge target

- Displays the chargeable hours posted against target (hours)

Chargeable value vs charge target

- Displays the chargeable hours posted against target (value)



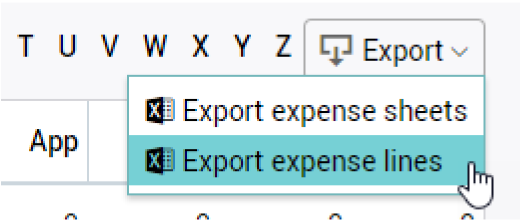
EXPENSES

New exports

Two new exports are available from 'Expenses' and 'Expense approval' main lists:

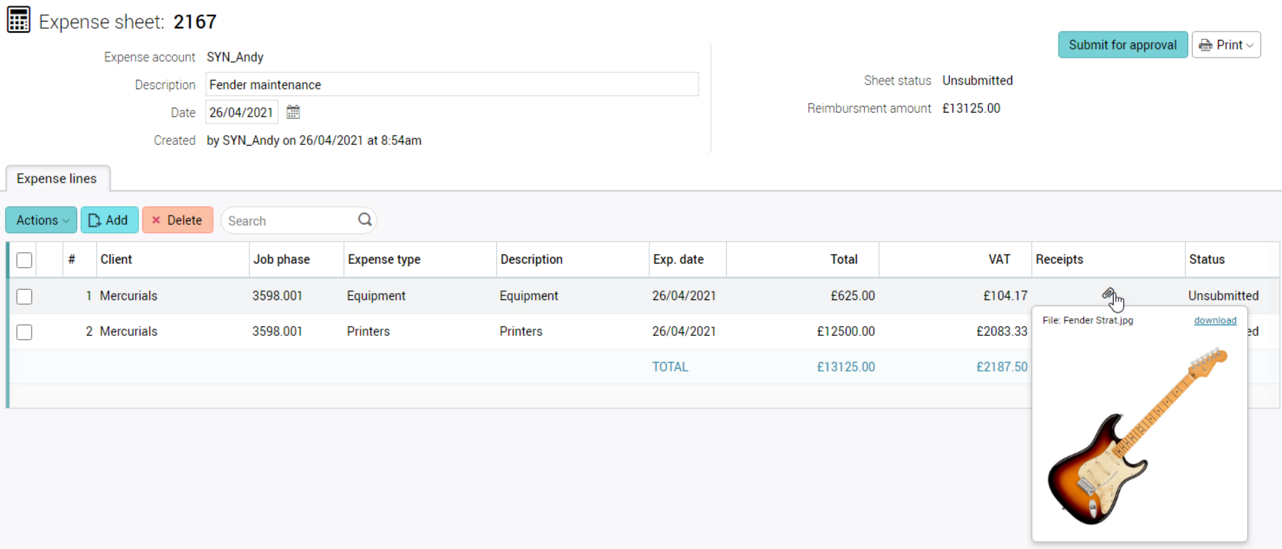
- Export expense sheets
  Export of the expense sheet headers

- Export expense lines
  Export of the expense sheets (including expense lines)

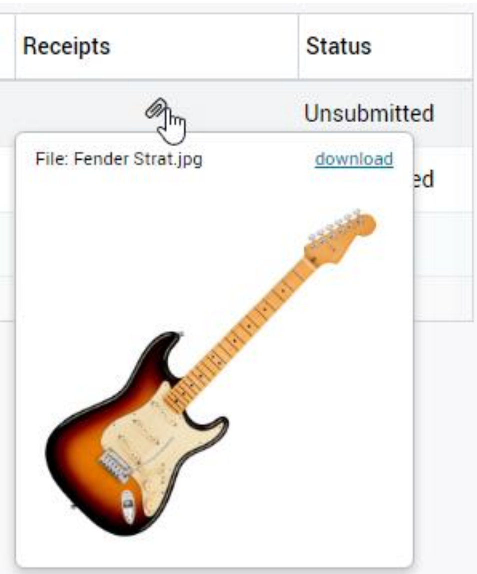


Previewing expense attachments on hovers

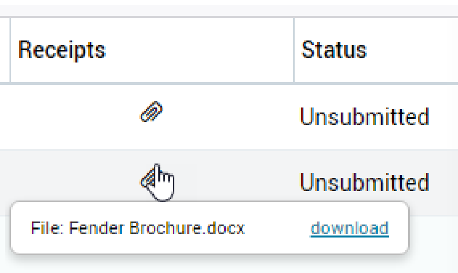
Image receipts on expenses sheet can now be previewed by hovering over the attachments icon.



Receipts with image attachment (jpg, gif or png) display a large version of the image including its name and a link to 'download'.



Receipts with non-image attachments display the attachment's name and a 'download' link.



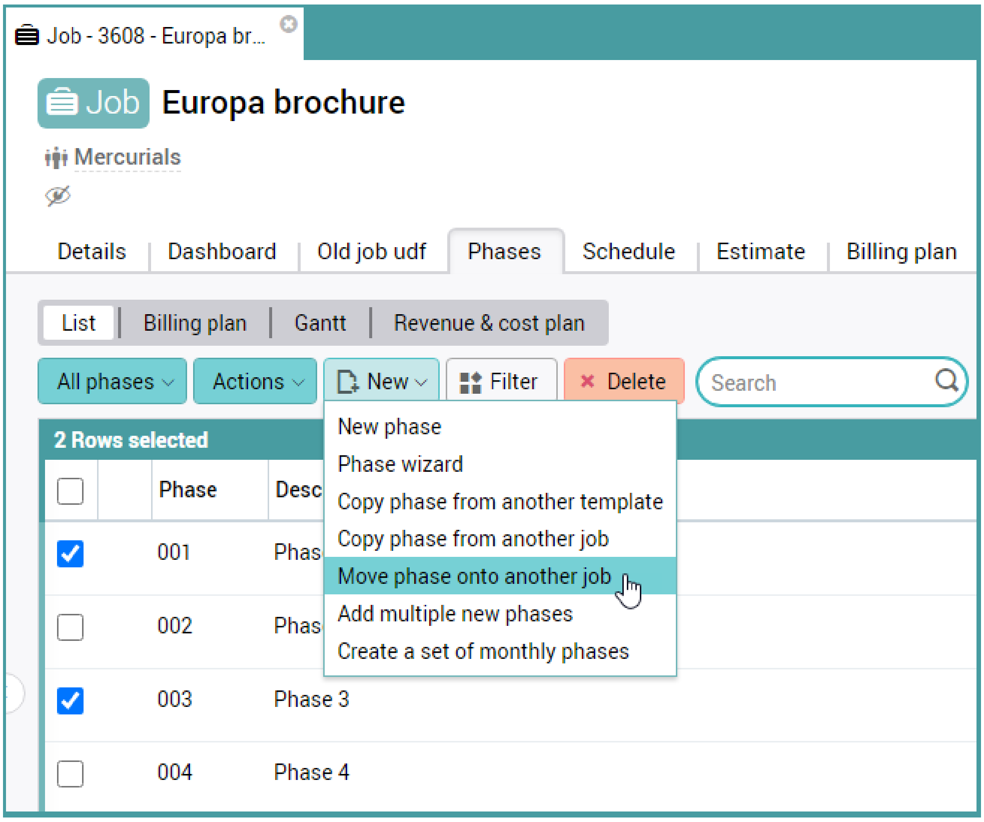
JOBS & PHASES

Moving phases on to other jobs

It is now possible to move phases from one job to another across clients.

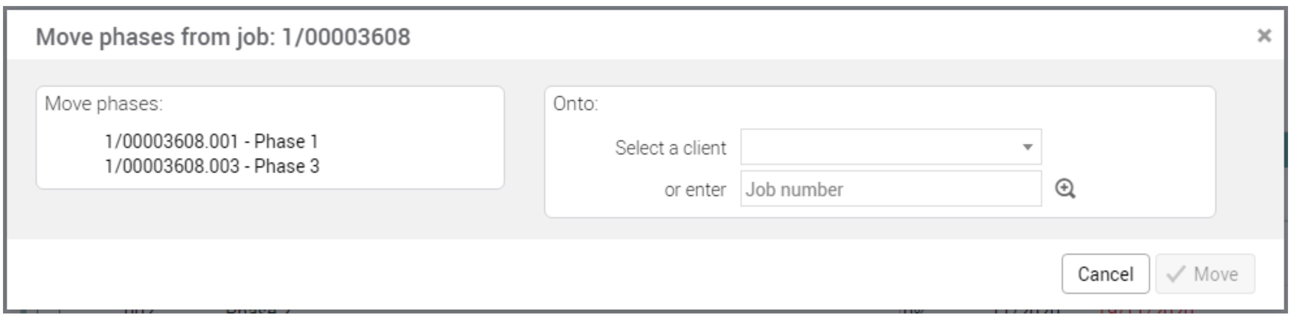
On the Job > Phases tab:

- Select which phases to move
- Click on the 'New' button
- Choose 'Move phase onto another job'



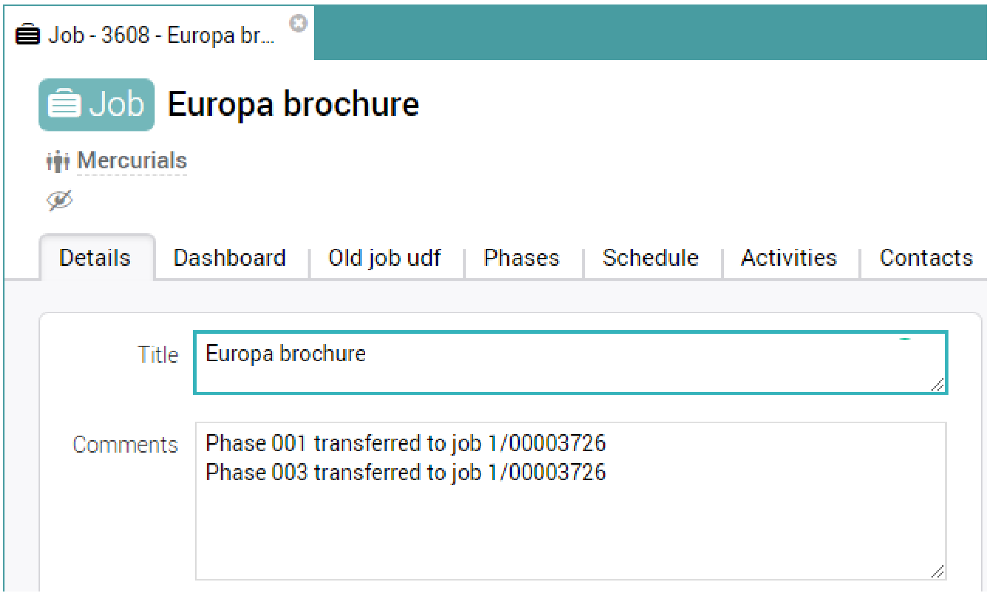
The dialog window opens containing two panels:

- The panel on the left is non-editable and shows the details of the phase(s) being moved
- The panel on the right is editable and contains two fields. Users must complete the two fields to identify the destination job

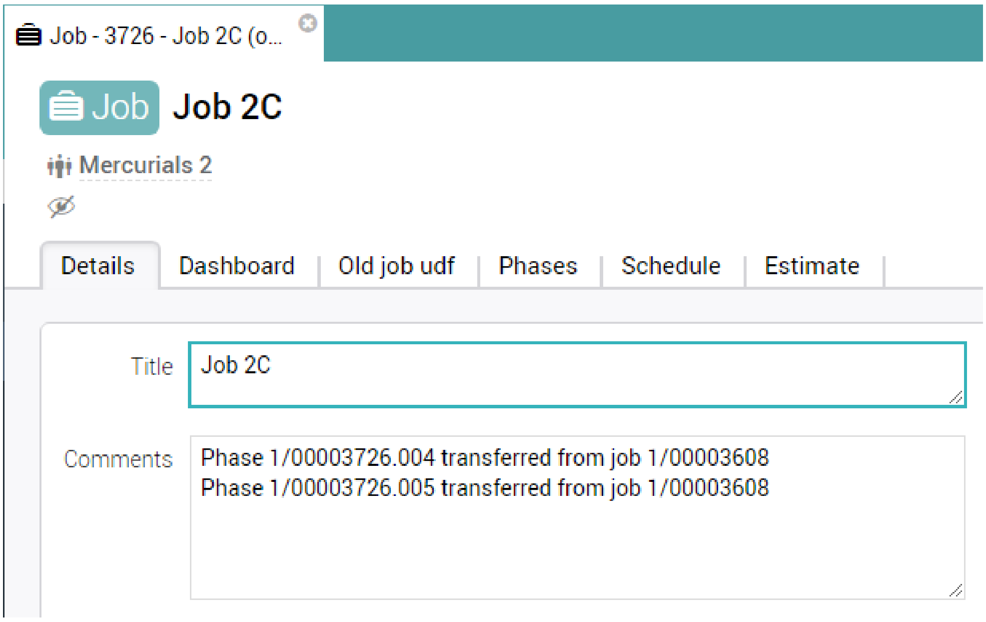


Note: Moved phases are assigned the next available phase numbers in the destination job.

Details of the phase move are recorded automatically on the source job:



Details of the phase move are also recorded automatically on the destination job:



Note:

- The source and destination jobs must have the same phase structure - they both need to be single or two tier jobs else the phases cannot be moved
- It is not possible to move all the phases because at least one phase must always remain on the source job
- Phases cannot be moved if they contain invoices

REPORTING

New reports

Profit by invoice

- Report of profit by individual sales invoice

Managed client SO's by order number

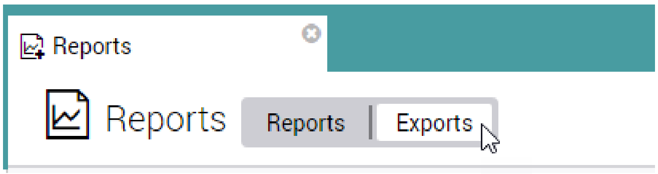
- Managed client sales order values by order number and job
- For users who are using the ‘Managed clients’ module (Sales orders)

Managed client SO's by job

- Managed client sales order values by job and order number
- For users who are using the ‘Managed clients’ module (Sales orders)

New exports

This new section is located within 'Standard reports'.



Invoicing & profitability
- Draft invoice approval - List of draft invoices requiring approval
- Costs not ticked-off - Costs not ticked-off against sales invoices (still in WIP)
- Write-offs - Write-offs (final invoices of zero value) raised over a period
- Job / phases export - BP vs quoted - Jobs where billing plans do not match quoted values
- Jobs awaiting invoicing - Completed jobs that have yet to be final invoiced (closed)

Purchasing & expenses
- Supply type analysis - Purchases by supply type
- Expense type analysis - Expenses posted to jobs showing cost and charge

Quoting & estimating
- Production quotes - Jobs based on due date showing amount quoted

Production
- Progress report - Compares total estimated hours with actuals - by job
- Projects - Budgets for client projects and any related phases
- Schedule stages report - Track the stages a job may go through when a schedule is being used
- Baseline cost to complete - Baseline cost to complete

Time & materials
- Time booked to jobs by charge code - Charge codes that have had timesheets booked in period selected
- Client pricing - Special prices set up for clients
- Last timesheet entered - Last timesheet entered for active resources
- Materials booked to job phases - Materials booked to job phases for a specified period

Financial
- WIP – movement - Variant of the WIP retro and WIP aged reports
- WIP – detail – WIP retro - export with detailed costs
- Client investment - List clients where investment total is not zero
- Departmental costing - Comparing current and actual costs by department

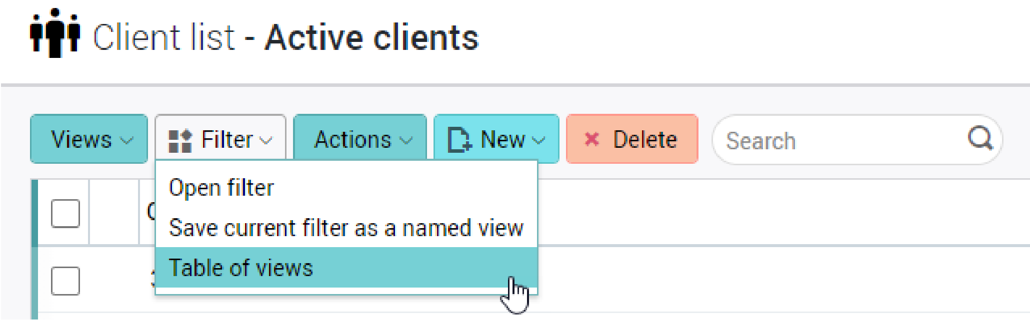
FILTERING & VIEWS

All the main lists accessible from the main menu have a filter button. This button is used to filter the current table. Once a filter has been applied, the user can save the filter as a named 'View'. Previously this could only be done from the list of views.

Example of a Views list:

Options on the Filter button

Saving views is now available on the Filter button. There is also an option to open a 'Table of views'. This will open the 'Table of views' and any views the user has access to will be displayed.



Timesheet reports – new filter

Reports can now be filtered by Employee and/or freelancer.

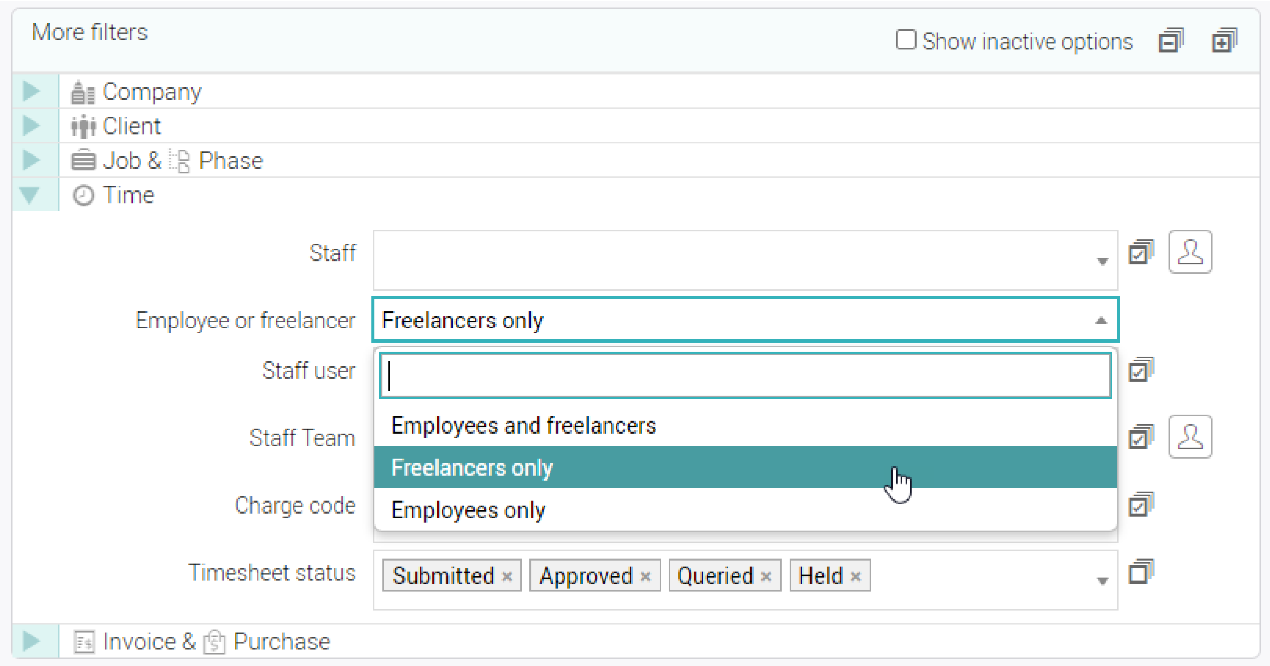
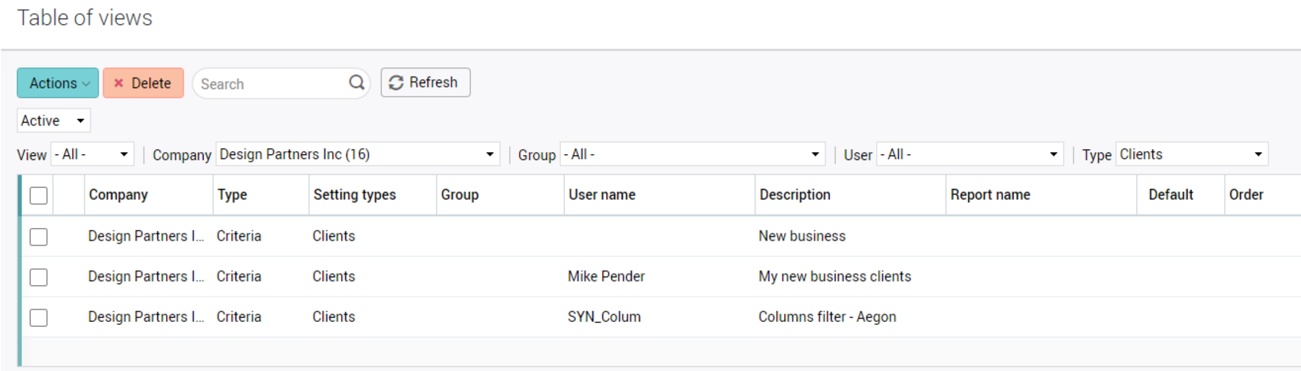


Table of views

From within the Table of views, the user can perform the following actions:

- Rename a view
- Delete a view
- Add / remove a view from the 'At a glance' dashboards
- Add / remove a view from the tabs of the input forms



Note: The 'Table of views' is also accessible via File maintenance > Table of views

Drop down filters

The following filters are provided to enable a view administrator to filter for specific views:

- View
  - \- All -
  - System
  - Company
  - Group
  - User

- Company
  - List of companies - defaults to the current company

- Group
  - List of user groups

- User
  - List of users – for filtering views created by specific users

- Type
  - Activities
  - Billing plans
  - Client contacts
  - Clients
  - Data dictionary
  - Data viewer
  - Etc.

Weekly timesheet – multiple entries per cell

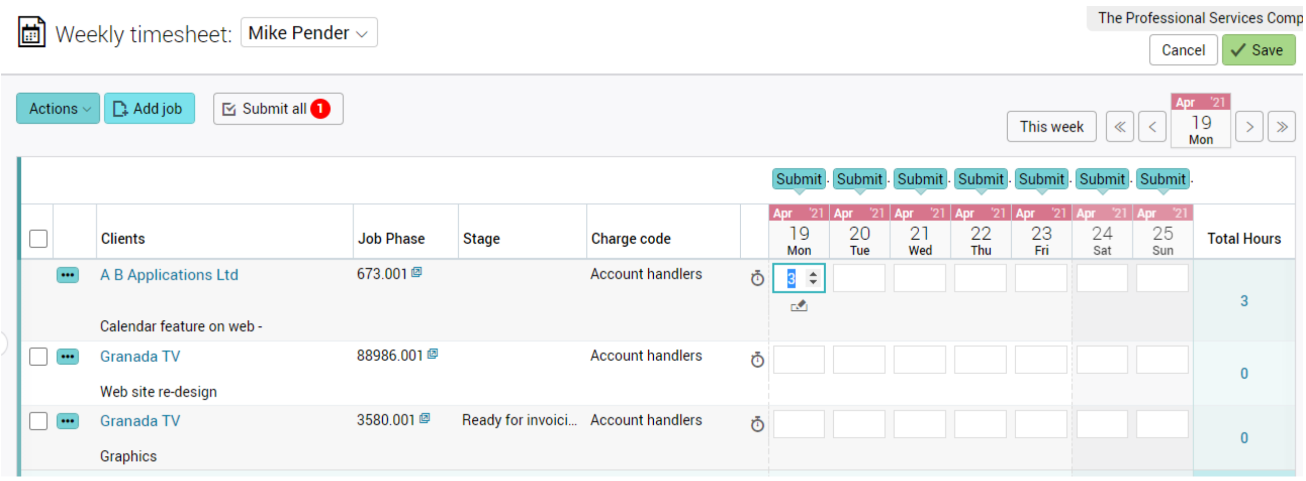
The weekly timesheet is designed to have the user update a single value per cell. Then at the end of the day, submit/post the timesheets for the day. Generally, this works well. However, there may be situations where it would be more convenient to have a weekly timesheet cell represent multiple timesheets.

For example, if you wish to:
- Enter multiple 'work done' notes
- Take advantage of the new time of day feature
- Submit timesheets during the day – maybe at midday – and then add new entries for the afternoon

It is now possible to work both ways – entering time in the single cell as normal – or opening up a list of timesheets for that cell and adding or amending multiple timesheets.

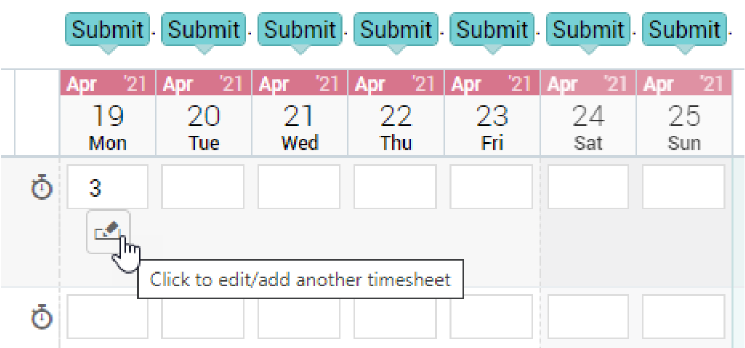
Weekly timesheet

In the following example, a user has entered 3 hours for the first job in the Monday cell.



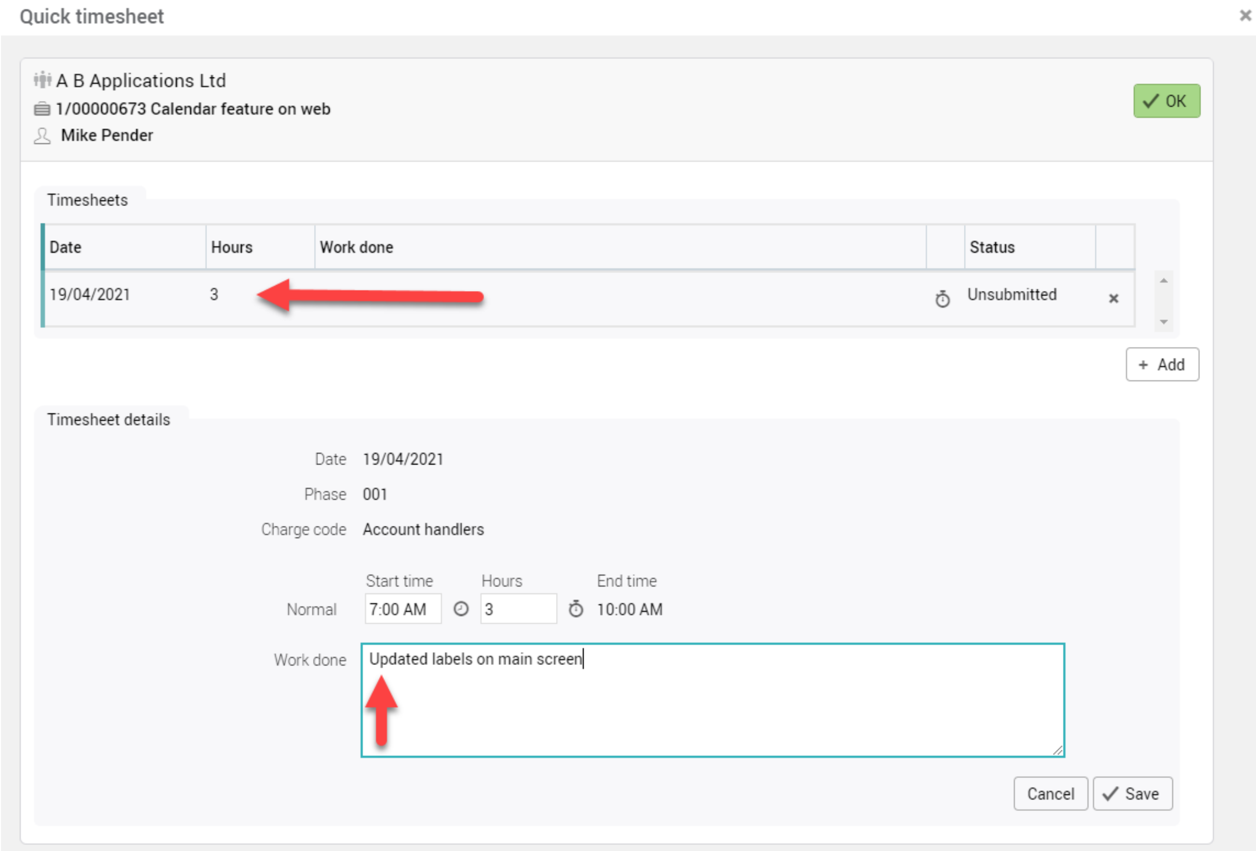
Adding 'work done' text

By clicking on the pencil icon, the user can open up the timesheet and add additional notes.



Timesheet input form

This single timesheet appears in the input form. At the top is a list of timesheets for this cell (currently just one timesheet), and the timesheet open for editing below. The user may edit the ‘Start time’, ‘Hours’ and ‘Work done’ fields before clicking ‘OK’ and returning to the main Weekly timesheet interface.

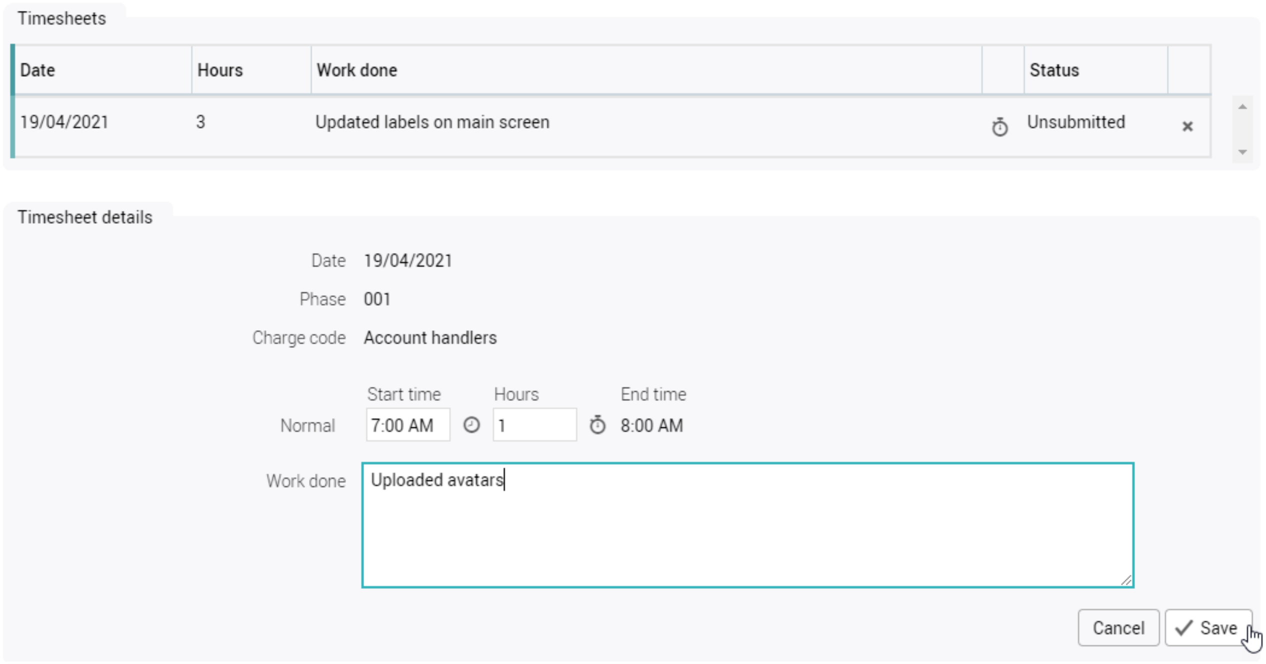


Adding an additional timesheet to the cell

If the user wishes to add an additional timesheet to the cell, this is now possible by simply clicking ‘Add’.

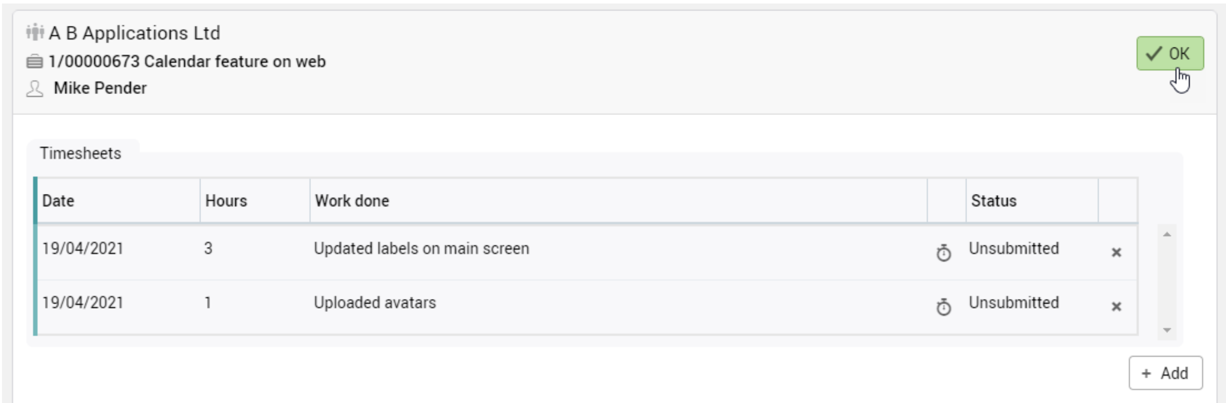
Entering time into the additional timesheet

The user enters the hours worked, a description of the work done and then clicks 'Save'.



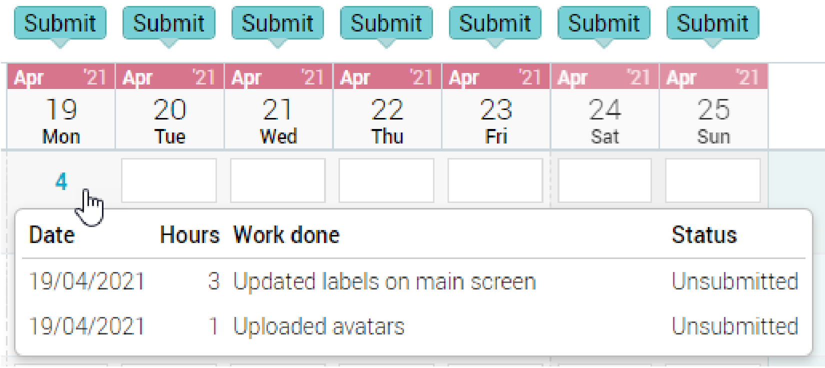
Multiple timesheets

There are now multiple timesheets associated with this cell. Click 'OK' to return to the main Weekly timesheet interface.



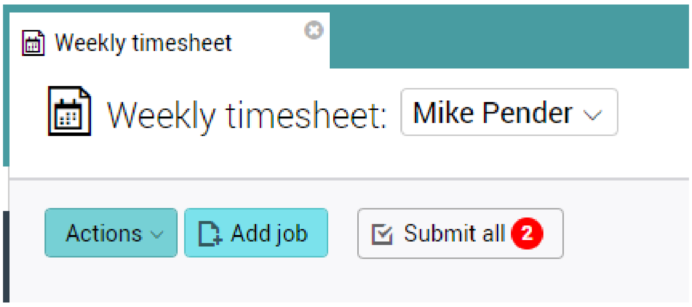
Weekly timesheet showing both timesheets

The Monday cell is now read-only since the value represents multiple timesheets. On placing the cursor over the cell, the timesheets are displayed in the hover. To modify the timesheets or add another, simply click the value shown in the cell.



Submit button

The Submit button now shows the total number of unsubmitted timesheets. This is simply a reminder of any unsubmitted timesheets you may have in the view. It would be normal practice to submit your timesheets at the end of the day by clicking this button.



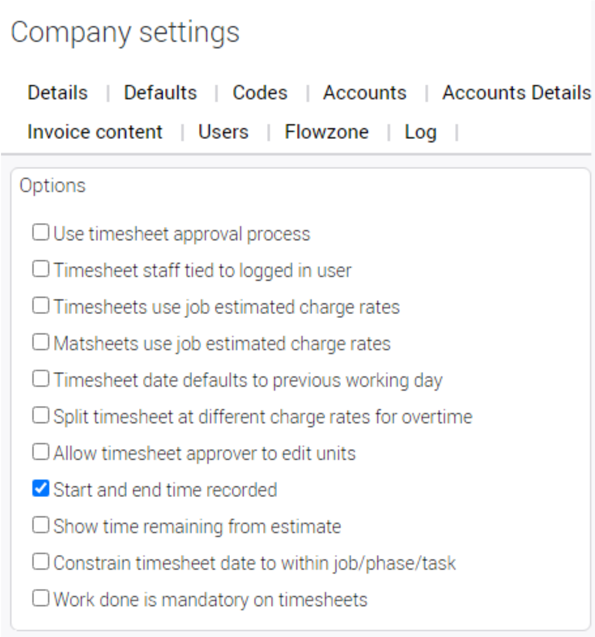
Advanced features

This new interface supports the use of timers (for the current day). You can also submit individual timesheets for approval, leaving others unsubmitted.

synergist

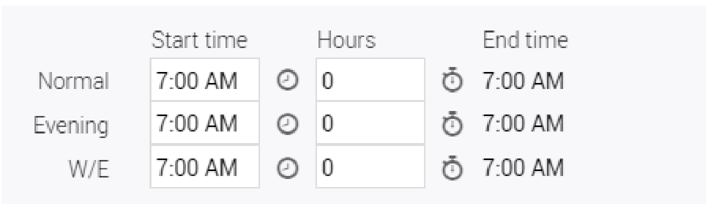
Time of day

There is now an option to record the start and end time on timesheets as they are entered. To enable this new feature, select 'Start and end time recorded' in Company settings > Timesheets tab.



The following fields will be displayed on timesheet entry:

- Start time
- End time

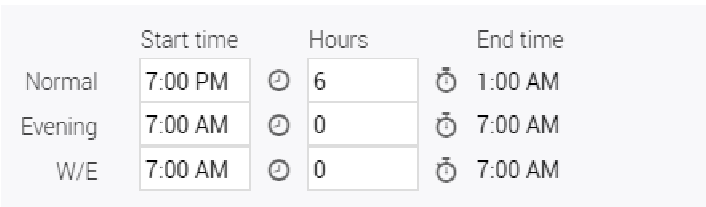


Start time:

On opening a timesheet, the Start time fields default to the company start time. The user can then change the Start times by clicking on the clock icon.

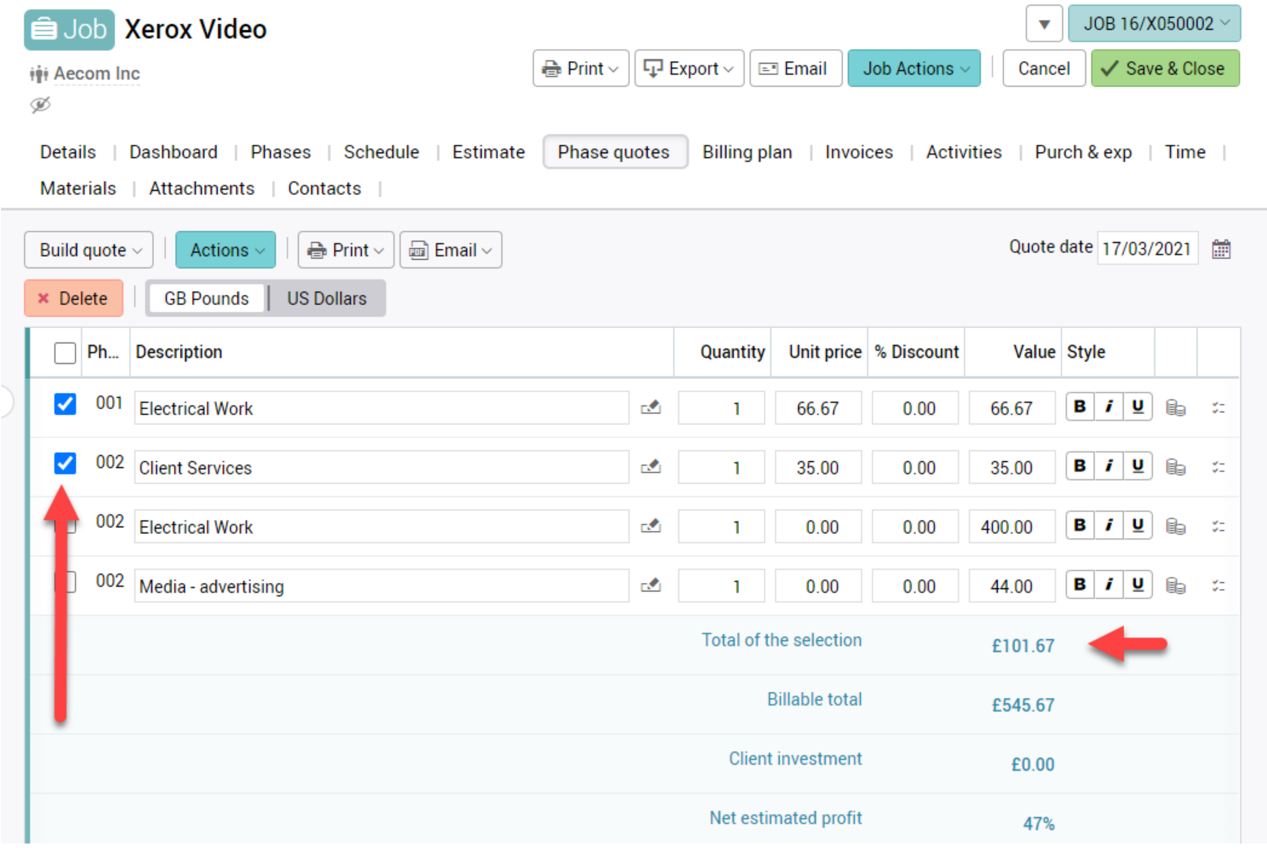
End time:

End time is automatically calculated according to the Start time plus the number of hours entered. If the End time crosses midnight, the timesheet is split into X timesheets on posting.



Selecting quote lines

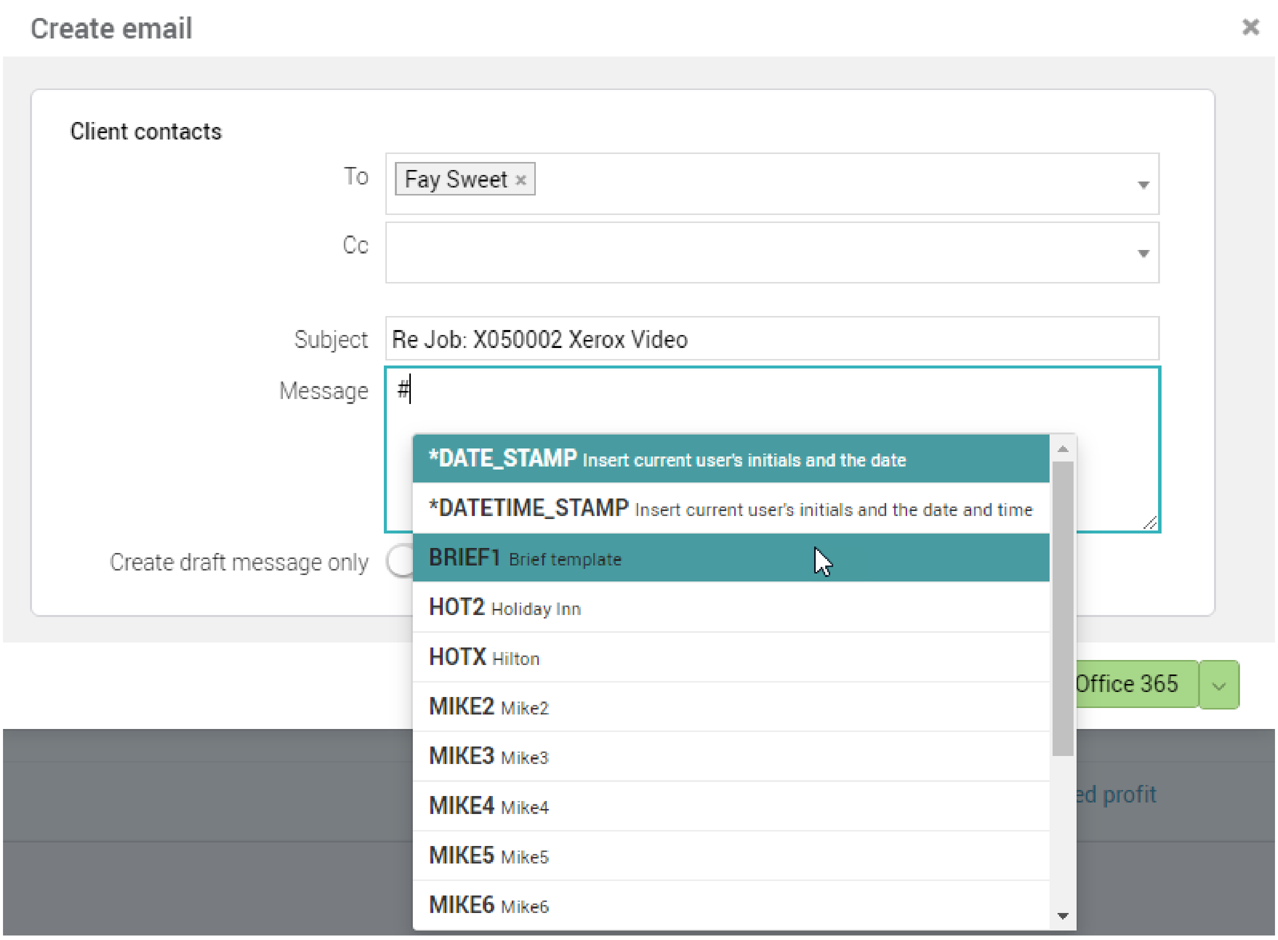
Selecting a portion of the quote – the total of the selection is now shown as a separate total at the bottom of the page.



Email - Standard paragraph support

This function provides an option to add text from standard paragraphs (enter a '#' symbol for a list).

Note: This feature is available in other areas that can also call the email feature.



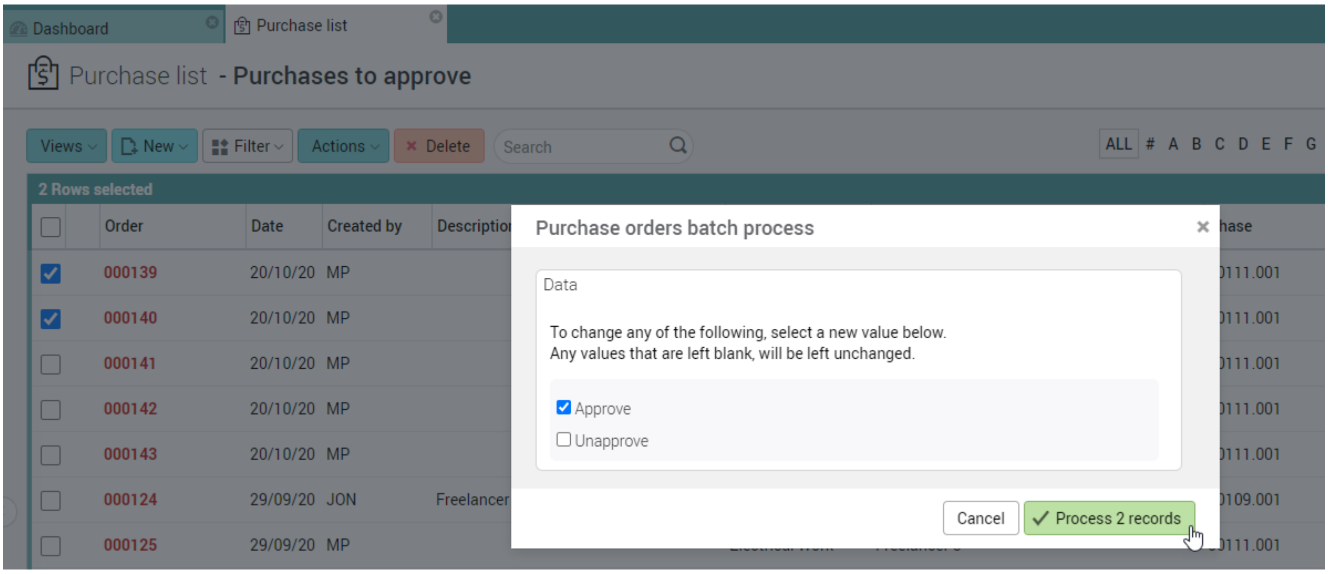
Supplier contact - custom fields

Custom fields are now available for supplier contacts.

Batch approval of purchase orders

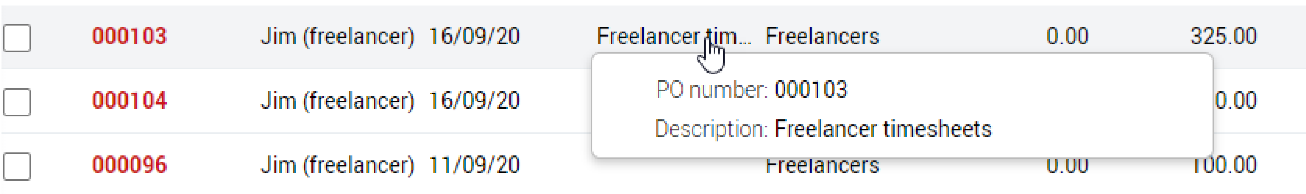
Batch approval of purchase orders is now available. To utilise this feature, first use the filter to create a view of unapproved purchase orders. Select the purchase orders you wish to approve and then click Actions > Batch update.

Note: You will need purchase order approval access rights to use this feature.



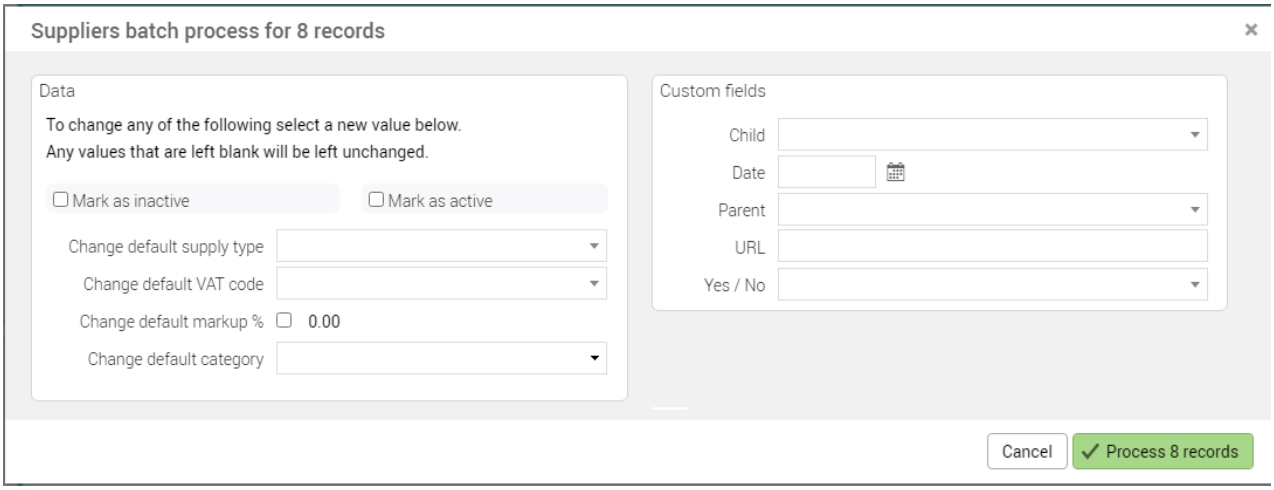
Hover text – job/purchases tab

Hover text has been added to the job and phase purchasing tabs



Supplier batch update additions

New additions to the Supplier batch update window include:
- The 'Change default category' field
- Custom fields



Note:
- 'Change default category' is located at the bottom of the 'Data' panel
- Custom fields are supported in the panel on the right

To access the Supplier batch update:
- Navigate to the Supplier list
- Tick/select the supplier(s) for batch updating
- Click on the 'Actions' button and choose 'Batch update'

MISCELLANEOUS

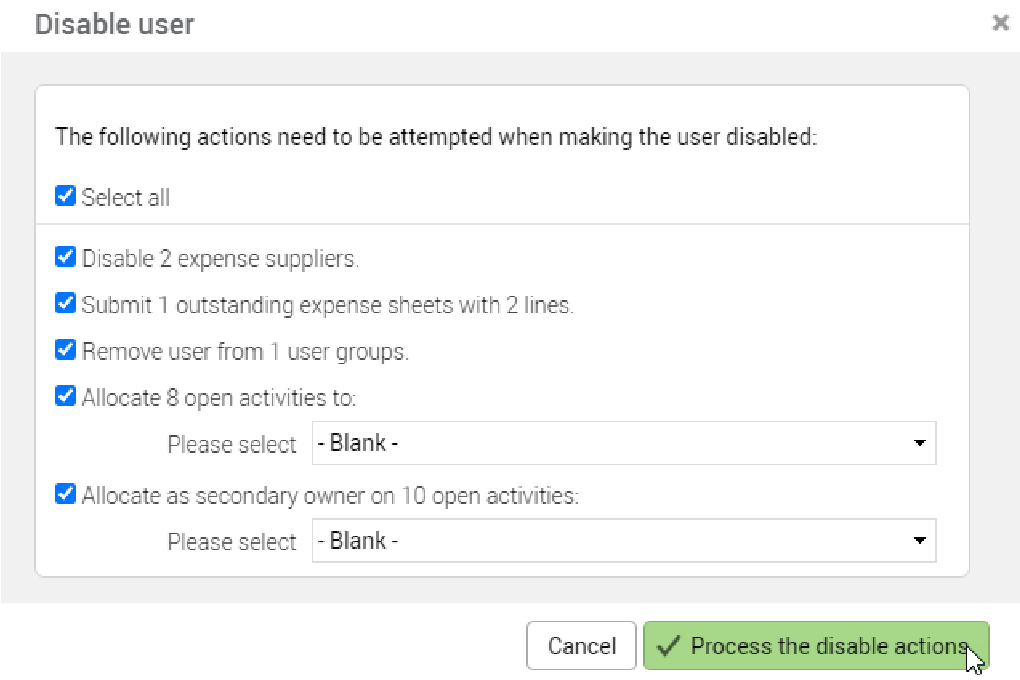
Mandatory numeric fields

Zero is no longer considered a valid value if a custom field has been set to be mandatory. Previously it was allowed in certain instances.

Disabling a user

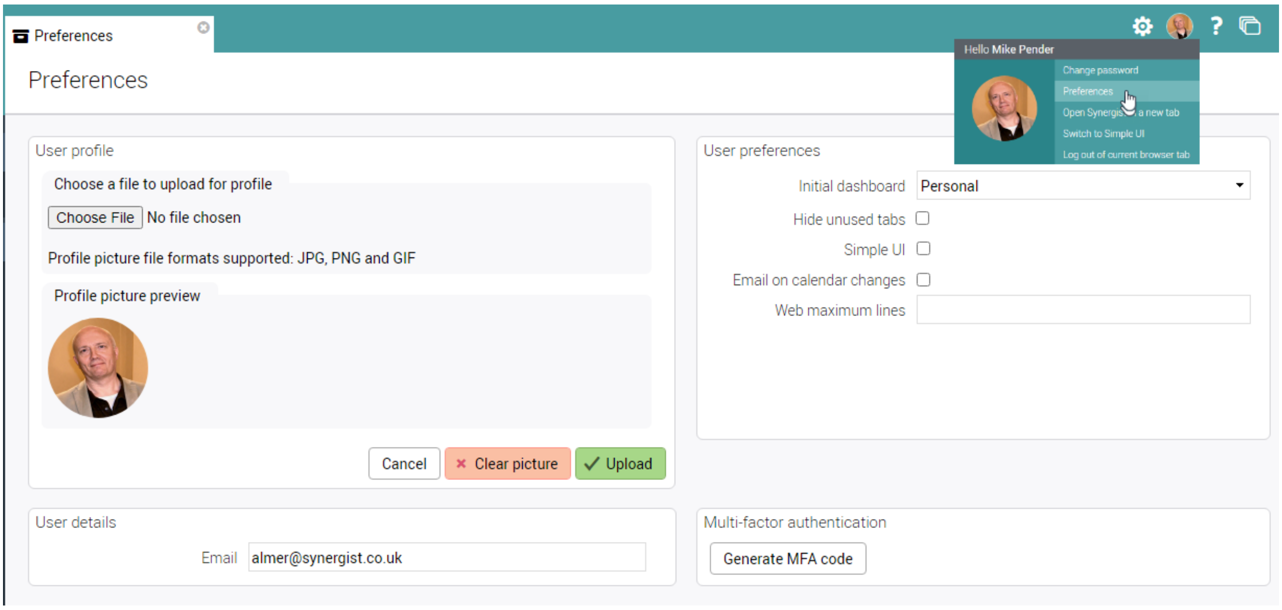
When an administrator decides to disable a user (often done when a user is leaving the company), it is important that related records are cleared down or re-allocated to another user. This includes submitting timesheets and expenses, re-allocating activities and calendar bookings, removing the user from groups etc.

To make this an easier process, on checking the 'Account disabled' checkbox on the user record, the system will search for any related records and prompt the administrator to process these items.



More options added to avatar preferences

The Preferences screen has undergone changes, allowing users to personalise their Synergist experience.



'User preferences' panel

Four fields have been added to this panel:

- Hide unused tabs
- Simple UI
- Email on calendar changes
- Web maximum lines

Note: These fields are also found in File maintenance > User > Details tab

'User details' panel

The new 'User details' panel makes it quick and easy for users to add/amend their email addresses.

'Multi-factor authentication' panel

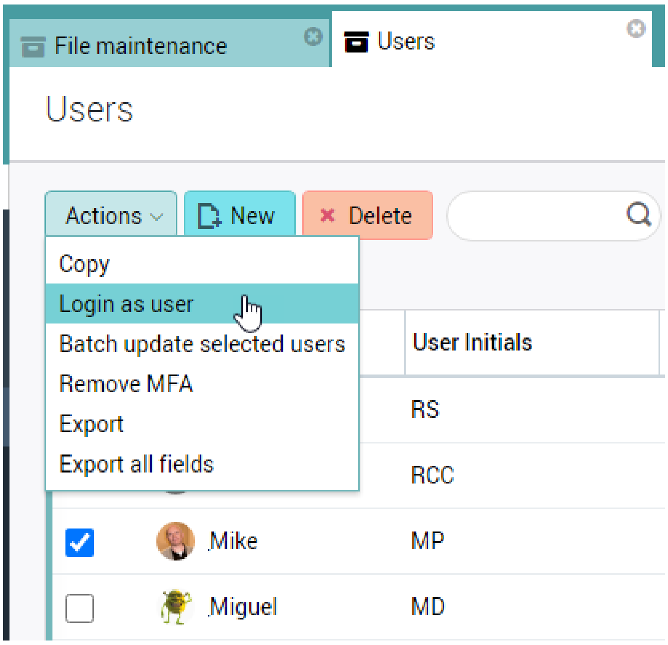
This panel maintains its existing functionality and has been repositioned on screen.

Administrator login as another user

The following feature enables a Synergist administrator to login as another user:

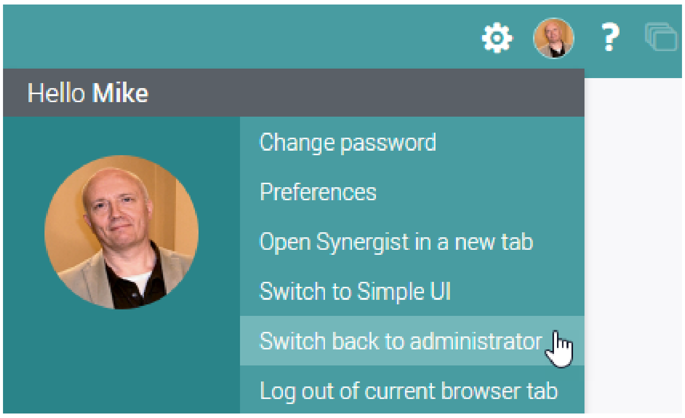
- Navigate to File maintenance > User's list
- Tick/select a user to login as
- Click on the 'Actions' button and choose 'Login as user'

Note: The user's password is not required.



To log back in as the administrator and return to the Users list:

- Click on the user's avatar
- Select 'Switch back to administrator'



Note:

- A user who has had their login impersonated may already be logged in. The user may continue to work and login / out of Synergist as usual

- Only one impersonation session can be active at any one time.

Payment status on invoices

Invoices linked to the following on-line accounts systems can now display the payment status

- Xero
  Tooltip also shows date paid for a fully paid invoice

- Sage Business Cloud Accounting
  Tooltip also shows last payment date made against a part or fully paid invoice

- QuickBooks Online.
  Tooltip on status shows outstanding balance of invoice if part paid.

Example: