

Technical Release Notes 2022

This document details the changes implemented into Synergy, including new features, improvements, and bug fixes.

December 2022

Release Date: 11 December 2022

New Features

Payment Application

From a Draft Invoice, you will be able to generate, download, and send a Payment Application. Introducing this capability we've included new Draft Invoice Statuses, a new Document Template, and new reporting capabilities.

Draft Status

We've introduced a new Draft Status, which can be set in an Invoice. You can filter the Invoice List by the Draft Status and use them for Reporting.

Draft Statuses include:

- Created
- Application Sent
- Application Approved

By default, all Draft Invoices will use the 'Created' Draft Status.

Application Number

We've introduced Application Numbers, which can be customised, and when used in a Draft Invoice can be auto-assigned.

Payment Application Numbers can be accessed from the Organisational Settings, and from here you can create new Payment Application Numbers and manage them.

You can customise the Prefix, set the starting number and edit the format you want your numbers to be displayed.

You will also be able to set a default Payment Application per office.

Payment Application Template

The Payment Application is created from a new document template. This template uses all the existing bookmarks of Invoice Templates.

There is one new bookmark which is set in the Payment Application document: Payment Application Number.

By default, our Payment Application Template is identical to our Invoice Summary Template, except instead of Invoice Number, Payment Application Number is shown, and no payment details are shown.

Like our other Templates, you can also create your own Payment Application Template, so it fits your business' needs. This works with Switch Layout, which will let you switch between different Payment Application Templates.

Generating and Sending a Payment Application

From a Draft Invoice, you will be able to generate, download, and send a Payment Application. You can interact with these tools from the Invoice Document Preview drop-down menu.

- Download PDF
- Download Docx
- Upload Docx
- Reset Layout
- Switch Layout
- Send Payment Application

From the drop-down menu next to Save, you will also be able to click Send Payment Application.

Reporting

We've added three new reporting fields, which are available under the Invoice category.

New reporting fields:

- Payment Application Number
- Payment Application Last Sent Date
- Draft Status

You can also report on these fields, filter data on these, and group by these fields.

Edition Availability

Function	Professional	Business	Enterprise
Payment Applications			✓

Default Permissions

Payment Applications is part of the invoicing process. The default permissions for Invoicing are as follows:

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Payment Applications		✓	✓	✓	✓	✓

Some feature permissions can be customised via Synergy's Security Matrix for your organisation.

Additional Fixes

- Fixed an issue where the invoice percentage wasn't updating when the value was changed for the stage from an invoice.
- Fixed an issue where sometimes running reports filtered by Internal projects was timing out.
- Fixed an issue where the query limitations weren't showing when generating reports, so it was unclear as to why some reports and on-screen values were showing differently.

November 2022

Release Date: 6 November 2022

New Features

Custom Field Updater

We're introducing the ability to export and import data to update your Custom Field records in Synergy across multiple Projects or Project Stages.

Exporting Records

You will be able to export an Excel spreadsheet of Project records from the 'Project' list page, via the ellipses submenu. When exporting Custom Fields for Projects, the export will contain records from all pages. When exporting Custom Fields for Project Stages, the export will only contain records from the current page.

If the 'Project's list has been filtered, then the exported project records will have the same filters applied.

The spreadsheet export will contain Project or Project Stage Custom Fields (active fields only) with abbreviated column headers with "CF_<customfieldname>".

Each record also contains the following Standard Fields;

- Entity ID,
- Entity Name
- Entity Type.

The standard fields Entity ID and Entity Name are used as identifiers to associate the records back to the individual project when importing the record back into Synergy using the Custom Field Importer. These identifier fields should not be edited by the user when editing Custom Field Records. If neither identifier field is valid the import of the record will fail.

After being exported you will be able to update your Custom Field records as need. Once updated, the file should be saved as either as a .csv or .xlsx in order to be imported back into Synergy.

Importing Records

You will be able to import your spreadsheet containing your updated Project or Project Stage Custom Field records using the Custom Field Importer, which is accessed through the main menu navigation as follows:

Settings > Organisation > Data Imports > Excel Import > Custom Fields Tab

In order for the records to be successfully updated, the following must be considered:

- If the Entity Id (primary identifier) field is empty, the importer will use the Entity Name (secondary identifier) to associate the record with the project.
- If both the Entity Id (primary identifier) and Entity Name (secondary identifier) fields are empty, then the record will fail to import and present an error.
- The spreadsheet ready for import can only be one entity type, e.g. Project or Project Stage but not a mixture of both.
- If a cell in the spreadsheet contains data on a record and it is then cleared (deleted) then it will also clear (delete) the data from that field in the Synergy record during the import/update.

Edition Availability

Function	Professional	Business	Enterprise
Export Custom Field Records		✓	✓
Import Updated Custom Field Records		✓	✓

Default Permissions

An Administrator will be able to configure which Synergy user groups have visibility and access to:

- The 'Projects' page menu options to:
 - Export Excel Project Custom Fields
 - Export Excel Project Stage Custom Fields
- 'Custom Fields' excel import tab
 - This tab is always visible regardless of Custom field Security Matrix settings.

The default permissions are as follows:

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Export Custom Field Records					✓	✓
Import Updated Custom Field Records					✓	✓

Project Permissions

You can increase the security permissions from the Organisation Configurations. There is a new option under “Project Permissions” you can check the box for “Enable project permissions by team” to enable security permissions for a project.

When the feature is enabled, there will be a new field available from the Project Details page. From the “Project Permissions” drop-down menu, you will be able to select from any Team you’ve created within your organisation. The selected Team will be the only users who can access the project, including the planning boards and financial information.

From the Security Matrix, you will be able to select what roles can bypass Project Permissions; this is set to Director and System Administrator by default.

Edition Availability

Function	Professional	Business	Enterprise
Export Custom Field Records		✓	✓
Import Updated Custom Field Records		✓	✓

Default Permissions

From the Security Matrix you will be able to select what roles can bypass Project Permissions.

The default permissions are as follows:

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Export Custom Field Records				✓	✓	✓
Import Updated Custom Field Records				✓	✓	✓

October 2022

Release Date: 16 October 2022

New Features

Now you will be able to create a Purchase Order from Synergy, and we're also releasing the ability to customise the email domain that your messages from Synergy are sent from.

Purchase Orders

We're introducing the capability to create a Purchase Orders in Synergy.

When using Purchase Orders, you'll be able to:

- customise, generate, and send a Purchase Order document
- reconcile a Purchase Order to one or more Bills

Creating and Managing Purchase Orders

Purchase Order List

The Purchase Orders page will be accessible from the main menu, or from the Financials menu within a Project, where it will filter to only show Purchase Orders associated to that Project.

From this page you will be able to create a new Purchase Order, and you can organise your existing Purchase Orders. You can use Search to find characters from the Project name, Purchase Order Contact, or Purchase Order number.

You will be able to filter your Purchase Order List by:

- Contact
- Office
- Project
- Project Manager
- Purchase Order Status

You will also be able to move the displayed columns and resize them.

Inside a Purchase Order

Status

You can see and affect where the Purchase Order is across a range of statuses. You can change the Status by clicking on the control, or using the drop down menu beside the status that shows when hovering a mouse over the status.

There are statuses and sub statuses that help you when drafting your Purchase Order; these are:

Status	Sub Status		
Draft	Created	Changes Required	
Approval	Ready	Changes Required	Approved

When using these Statuses, you can edit any field for the Purchase Order and you can edit the Purchase Order line items.

There are also statuses that indicate that you have finalised your Purchase Order, which will lock most fields from being edited.

Status	Sub Status	
Finalised	Ready to Send	Sent
Reconciling	In Progress	Partially Paid
Complete	Fully Paid	Reconciled
Cancelled	Cancelled	Written Off

The Statuses can be used to filter the Purchase Order list and reports.

Changing the Status will automatically save any changes you've made to the Purchase Order.

Purchase Order Details

By default, when viewing a Purchase Order, the Details tab will display the primary fields for the Purchase Order, which are represented in the Purchase Order document as bookmarks in the Template.

Fields that can be set for Purchase Orders include:

Field	Additional Details
Contact	The Contact for the Purchase Order
Attention	Personnel associated to the Contact
Address	The Address of the Contact or Attention
Additional Recipients	This field isn't locked when finalising the Purchase Order and isn't reflected on a Template
Prefix, Number	Much like Invoice Number, this can be set
PO Date	By default, this will populate with today's date
Delivery Date	The expected Delivery Date; this field can be left blank
Payment Terms	A set of terms that are the same as invoicing
Ref Number	A unique number that can be set for Purchase Orders
Requested by	An internal Team Member or Office that can be set for a Purchase Order
Special Instructions	A free form text field that lets you add additional details

Document Generation

Like Invoices and other documents you generate from Synergy, you can set a default Template from the Document Templates page. By default, you will have access to a basic Purchase Order template, which will be used to generate your document from the fields on the Details tab.

You can preview your Purchase Order document from the new slide-out Documents pane, by clicking on the image of the document. From here you can click the Download button to download your document as a PDF, or you can use the more menu for more options.

From the More menu you will be able to:

- Download docx
- Upload docx
- Reset layout
- Switch layout
- Select a previous document version

Sending and Reconciling

From a finalised Purchase Order, you will be able to send your document as an email, and you can reconcile your Purchase Order against Bills.

You can send an email from Synergy to all the contacts selected in the Purchase Order, which will include your Purchase Order document as an attachment. The email sent from Synergy will take advantage of the new Custom Email Domain improvements, so if you're configured that you will be able to have your Purchase Orders be sent via your domain, or a specific email address.

From any finalised status, you can reconcile your Purchase Orders against one or more Bills. You can click the Reconcile tab from the top of the Purchase Order and quickly create a Bill directly from the Purchase Order.

When creating a Bill from a Purchase Order, some of the fields will be entered for you and the Purchase Order Items will be visible as Bill Items.

Show Fields	Additional Details
Bill Number	This field will be empty and require input
Bill Date	Prepopulated with today's date
Due Date	Prepopulated with today's date
Discipline	Preset to the first Discipline in your list
Bill Lines	Prepopulated with the Purchase Order Lines

Some fields will not be shown when creating the Bill, these will automatically be set by the Purchase Order.

Bill Fields	Purchase Order Fields
Bill Contact	Purchase Order Contact
Office	The Office associated to the Purchase Order Project
Purchase Order	The Purchase Order Number
Cost Centre	Default Cost Centre

All Bills associated to the Purchase Order will show on the Reconcile tab, and you can click the Bill Number to open the Bill directly.

Edition Availability

Function	Professional	Business	Enterprise
View a Purchase Order	✓	✓	✓
Create a Purchase Order	✓	✓	✓
Edit a Purchase Order	✓	✓	✓
Finalise a Purchase Order	✓	✓	✓
Reconcile a Purchase Order	✓	✓	✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
View a Purchase Order		✓	✓	✓	✓	✓
Create a Purchase Order		✓	✓	✓	✓	✓
Edit a Purchase Order		✓	✓	✓	✓	✓
Finalise a Purchase Order			✓	✓	✓	✓
Reconcile a Purchase Order		✓	✓	✓	✓	✓

Some feature permissions can be customised via Synergy's Security Matrix for your organization.

Custom Email Domains

You can now connect your organisation's email domain and allow users to send emails from Synergy using their email addresses and set up default email addresses for different email types and offices.

This can be found on the main menu under 'Email Connections'.

Custom Email Domain Setup

To establish your custom email domain with Synergy, a configuration process is required between Synergy and your company's domain DNS records. To do this you will need to go to 'Domain Setup' on the email connections page.

Note: This will require some technical knowledge of DNS setting and domain configuration. We recommend contacting either your IT admin or domain provider for support on the initial setup and before editing your DNS records.

The steps required in the domain set up process are:

Step	Details
Enter Your Domain	This is the domain you would like to send emails from Synergy with.
Configure DNS Settings	This step provides guidance on how to find your domains DNS records. If unsure how to find your DNS settings, type 'DNS into your domain providers search or contact your domain provider directly.
Update Your DNS Records	Copy and paste the DNS records provided by Synergy into your domain's DNS records (this can vary slightly per Domain provider so if unsure send a copy of the records from synergy to your domain provider to receive further guidance.
Verify Your DNS Records	<p>Here we will check your DNS records are entered correctly you will see a status message next to each record.</p> <p>Note: 'escaped' and 'unescaped' there are two versions of the same record. Depending on your domain provider, one of the two versions should be valid.</p>
Email Validation	We will send an email to your inbox to validate your domain, this email will need to be validated to proceed with the setup.
Enable the Connection	<p>Enable or Disable the connection with Custom Email Domain.</p> <p>Enabled - Synergy will send emails from your custom email domain.</p> <p>Disabled - Synergy will no longer send emails from your custom email domain.</p>

Once your Custom Email domain is setup and enabled, your Invoices, Purchase Orders, Documents, and Portal Invitations will be sent from Synergy with the individual user's email address (e.g., joebloggs@mydomain.com).

Default Email Addresses

By default, emails sent from Synergy (including Invoices, Purchase Orders, Documents, and Portal Invitations) will be sent using the individual user's email address (e.g., joebloggs@mydomain.com).

You can configure a custom default email address for accounting related emails from Email Connections/Accounting. 'Accounting' email defaults can be set for all offices (e.g., accounts@mydomain.com) or per office (e.g., newcastleaccounts@mydomain.com) and will begin to function once a default email has been setup and verified.

If left blank, emails will be sent from the individual users email for that office (e.g., joebloggs@mydomain.com)

Once the custom emails are entered, an email verification will be sent to the email inbox. (The verification email can be re-sent if required.)

A verification status will show next each default email.

Status	Details
Pending email verification	Email has not been verified
Email has been verified	On verification of the email address, accounting related emails for the office will be sent from that default email address.

To setup all offices to send from one default email (e.g. accounts@mydomain.com) enter same email address in each per office default email field.

Edition Availability

Function	Professional	Business	Enterprise
Custom Email Domain		✓	✓
Individual User Emails		✓	✓
Office/Team Emails			✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Administrator	Administrator
Custom Email Domain				✓	✓	✓
Individual User Email Setup				✓	✓	✓
Office/Team Email Setup				✓	✓	✓

Some feature permissions can be customised via Synergy's Security Matrix for your organization.

Project Board Filters

We've added extra filters so you can better manage your Project Boards.

Filter Name	Filter Description	Filter Accessible
Project Manager	Filters to show only Projects where the specified person is allocated as Project Manager.	<ul style="list-style-type: none">• Project Planning• Resource Planning• Revenue Forecast
Stage Manager	Filters to show only Stages and Projects where the specified person is allocated as Stage Manager.	<ul style="list-style-type: none">• Project Planning• Project Schedule• Resource Planning• Revenue Forecast
Primary Rate (Previously Rate)	Filters to show only people whose Primary Rate is selected.	<ul style="list-style-type: none">• Resource Planning
Rate (Updated)	Filters to show only people whose Primary or Secondary Rate is selected.	<ul style="list-style-type: none">• Resource Planning

We've also made improvements when combining the filters for Team and Unassigned. This combination will now show you any unassigned roles for Projects where any Team members are Project Manager for.

Additional Improvements

- We've added some additional logging to better track Invoices not being sent from Synergy

Fixes

- Fixed an issue where the Invoice List filtered by Project Manager was showing Invoices even if that Project Manager had been changed.
- Fixed an issue affecting reports, where any column using a weighted forecast amount in an expression, will show a 0.
- Fixed a rare issue, where sometimes the Global Search would display an error message.
- Fixed an issue where Transactions in Invoice documents were sorting by the timesheet entries instead of the timesheet date.
- Fixed an issue where deleting dates in the To and From fields in the Invoice were sometimes setting the date dropdowns to read only.