synergy

Technical Release Notes 2024

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

A Total Synergy product

TOTAL SYNERGY

February – Release date 18/02/2024

New Capabilities

1. Settings - Custom Access Levels & Security Matrix Improvements:

We've enhanced the Security Matrix with a new interface and introduced custom access levels. With Enterprise Edition, you can now create up to six new access levels in the Security Matrix. Each custom access level can be given a unique name, and you can base it on an existing level. This allows you to edit the permissions available for that level without affecting the base access level.

Improved Security Matrix

The Security Matrix and Analytics Security Matrix have been consolidated into a single table, and permission categories have been reorganized alphabetically for improved usability.

Additional Permissions

New permissions have been added for accessing the Security Matrix and editing Teams:

Function	Default Permissions
Read Security Matrix	System Administrator
Edit Security Matrix Permissions	System Administrator
Change Primary Team Member	Assistant Administrator

These permissions can be adjusted for different access levels but cannot be removed for the System Administrator.

New Interface Options

Enhancements include new functionality to simplify navigation through the Security Matrix, such as the ability to filter by search terms and expand/collapse permission categories.

Edition Availability

Function	Professional	Business	Enterprise
Create custom access levels			✓
New interface options	✓	✓	✓
New permissions on security matrix	✓	✓	✓

2. Customised Resourcing

In this update, Synergy users gain the ability to tailor resourcing logic for stages and individual resources in Project Planning and Project Schedule. This newfound flexibility offers the option to adjust stage or resource duration, with choices to either maintain weekly resourced hours or modify total hours. This update seamlessly integrates planning mode functionality into delivery mode.

Resource Management Options

Three resource management options have been introduced:

- Configuration Page: Users can establish an organisation-wide preference through the Configuration page.
- Shortcut Keys: Utilising 'CTRL' (or 'CMD') and 'Shift' keys during stage or resource extension provides convenient access to 'Keep weekly resourced hours' and 'Keep total resourced hours' functionalities.
- Side Menu Editing: Logic adjustments can be made via the Stage Details and Resourcing Side Menus.

Configuration Page

A new fixed option on the Configuration page enables organization-wide customisation. The default setting, 'Keep weekly resourced hours,' aligns with the current delivery mode logic, while 'Keep total resourced hours' mirrors planning mode.

Shortcut Keys

Shortcut keys have been introduced to simplify editing in Project Planning and Project Schedule. Holding 'CTRL' (or 'CMD') while extending a stage activates 'Keep weekly resourced hours,' and 'Shift' enables 'Keep total resourced hours,' eliminating the need to alter the configuration page.

Side Menu Editing

Clicking on a stage or resource opens the respective side menu for logic editing during stage start and end date adjustments or individual resource date range modifications.

Customisation from a Stage

By default, 'Keep weekly resourced hours' maintains the classic Synergy Delivery Mode, while selecting 'Keep total resourced hours' enables Planning Mode functionality in Delivery Mode. Customizing a stage allows bulk editing of resources within that stage.

Customisation of a Resource

Individual resource logic customization is possible through shortcut keys, applying changes only to the specific resource pill.

Edition Availability

Function	Professional	Business	Enterprise
Customise resource			✓
Configuration page			✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant System Admin	System Admin
Customise resource				✓		✓
Configuration page			✓	✓	✓	✓

Additional Improvements

We have updated the instructions in Email Connections, with new DNS configurations, including:

- 2 CNAME domain keys
- dmarc file

Issues that have been fixed

- **Staff:** Corrected error messages displaying incorrectly when setting a Staff member as inactive.
- **Templates:** Addressed template-related problem causing start and end date changes.
- **Exports:** Fixed export issue excluding Projects with non-hexadecimal characters in their name.
- **Documents:** Resolved regeneration problem for the Proposal Document.
- **Resource planning:** Improved accuracy of Public Holiday leave display in Resource Planning.
- **Projects:** Ensured correct calculation of Project and Stages Forecast in reporting when used in expressions. Additionally, resolved issue hiding the 'Export Project Custom Field' option for Business Edition customers.

January – Release date 21/01/2024

New Capabilities

1. Rates & Financials - Customised Payment Terms

Improved options for Payment Terms, across Invoices and Purchase Orders. To give you more customisation and flexibility around Invoice payments and financial workflows.

1. **Manual Due Date & Day of Month** - Due Dates can be set in two new ways:
   a) **Day of the month** - You can set a due date in the following month of the invoice date (regardless of the invoice date). You can select a date 1-31 and for months with less than 31 days it will default to the last day of the month.
   b) **Custom date range** - Due Date manually set.
   When setting the Due Date, it cannot be a date prior to the Invoice or Purchase Order date.

2. **Default Payment Terms** - Default Payment Terms for an organisation currently exists and now you can also set a default by: (automating payment terms once they are set in settings).
   a) Office – set payment terms for individual offices
   b) Project – set payment terms for specific Projects
   c) Contact – set payment terms for a specific contact

Edition Availability

Function	Professional	Business	Enterprise
Customise Payment Terms	✓	✓	✓

2. Invoices - Bulk Finalise and Bulk Send

To improve flexibility around invoicing, we have added to the feature of 'Bulk finalising and sending Invoices' (accessed from the Projects list). You can now break this bulk process into two separate actions providing faster and more efficient invoicing. The two NEW separate actions are:

- Bulk Finalise Invoices – to finalise invoices in bulk
    - Manually send invoices that have been finalised in bulk
    - Add attachments to finalised invoices before sending individually
- Bulk Send Invoices – to send invoices in bulk
    - Bulk send invoices that have been finalised individually
    - Finalise and send draft invoices and finalised invoices

With these independent bulk actions now supported, when bulk finalising and sending invoices, any invoices already finalised will also be sent.

Edition Availability

Function	Professional	Business	Enterprise
Bulk Finalise			✓
Bulk Send			✓

3. Zapier Integration

Synergy now connects to Zapier allowing you to integrate a variety of Synergy triggers and actions primarily to support HR and CRM applications like Bamboo, Salesforce, Hubspot, People HR, Bright HR, Sugar, ZoHo, Kula Hub, Workable and Pipedrive.

To connect Synergy to other platforms and take advantage of these triggers and actions, clients will require a Zapier account.

The triggers and actions included are:

Triggers (in a CRM or HR system that will integrate into Synergy):	
Staff (HR) - New or Updated Staff	
Leave (HR) - New or Updated Leave or Approved Leave	
Contact (CRM) - New or Updated Contact	
Project (CRM) - New or Updated Project	
Project Contact (CRM) - New or Updated Project Contact	
Project Status (CRM) - Updated Project Status	
Actions (in Synergy that will integrate and update in the CRM or HR system):	**Available Fields**
Create a Company (CRM)	• Name • ABN • ACN • Website • Primary Email • Phone • Address
Create Leave (HR)	• Synergy Staff ID • Synergy Leave Detail • Start Date • End Date • Comment

Create Personnel (HR)	• Title • First Name • Last Name • Parent Contact ID • Primary Email • Job Type • Website • Phone • Address • Custom Fields are also supported
Create Project (CRM)	• Project Name • Multi Stage • Template ID • Billing • Scope of Work • Primary Contact ID • Address
Create Staff (HR)	• Salutation • First name • Last Name • Email
Set Staff Termination Date (HR)	• Synergy Staff ID • Termination Date
Additional Actions (HR & CRM)	• Update Company • Update Personnel • Update Project • Update Project Status • Find Contact • Find Project • Find Project Template • Update Leave

These triggers and actions can also be used for other non HR or CRM integrations.
The key benefits of Zapier integrations with Synergy are:

1. **Automation**: allows users to automate repetitive tasks and workflows between different systems. This saves time and effort by eliminating manual data entry and reducing the chances of errors.
2. **Efficiency**: By integrating HR and CRM systems with Synergy through Zapier, users can streamline their processes and improve overall efficiency. Data can be seamlessly transferred between systems, ensuring accurate and up-to-date information across platforms.

3. **Enhanced Collaboration:** Zapier integrations enable better collaboration by enabling different teams or departments to share data effortlessly. This promotes a more synchronized and cohesive work environment.
4. **Scalability:** As businesses grow, the need for integrating different systems becomes crucial. Zapier provides a scalable solution by allowing users to connect multiple HR and CRM systems with Synergy, ensuring smooth operations even as the business expands.
5. **Flexibility:** Zapier supports a wide range of applications and platforms, making it highly versatile. Users can easily connect and integrate various HR and CRM systems with Synergy, regardless of the specific tools they are using.

NOTE: To integrate with Zapier customers need to purchase the Synergy Premium API add-on.

The Premium API add-on allows for 60,000 calls per day (of which 20,000 can be used for Transaction endpoints). The standard Synergy API that all customers have access to allows for 300 calls per day (of which 50 can be used for Transaction endpoints).

Additional Improvements

- **Timesheet Mandatory Notes** - You can now enable mandatory notes for Timesheets from the organisation configuration page. When the checkbox is selected notes will be required before a timesheet can be submitted.
- **Stage Notes** - You can now see inactive Stage Notes from a Stage. When the checkbox is enabled, the inactive Notes for that Stage will be displayed.

Fixes

- **Task** - Fixed an issue where adding a rate to a Task was not updated budget when saving.
- **Timesheet Report** - Fixed an issue where accessing the Timesheet Report was sometimes including summaries from other staff.
- **Stage** - Fixed an issue where you couldn't change the status of a Stage if the associated Phase was missing a unique phase number.
- **Project Documents** - Fixed an issue where some users who used Single Sign On were not able to upload large files in Project Documents.