Technical Release Notes 2024

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

A Total Synergy product

May – Release date 12/05/2024

New Capabilities

1. Analytics Plus – New Forecasting Dashboards:

We've added a new suite of dashboards for Analytics Plus, focused primarily on inspecting Forecasting and comparing against actuals. Dashboards are refreshed every 24 hours.

Dashboard Features:

1. Project Breakdown Dashboard: Offers insights by comparing revenue forecasts to invoiced amounts, and resourced charges to actuals. Features include:

- **Filters:** Customise displayed projects by various filters such as office, cost center, discipline, project type, and project manager.
- **Breakdown Table & Chart:** Detailed views of key project metrics on both Y (values and indicators) and X (months) axes, excluding completed and unsuccessful projects.
- **Variance Indicators:** Highlights forecast and resourced charge variances with color coding for quick analysis.

2. Resourced vs. Actuals Dashboard: Focuses on comparing resourced and actual charges with customisable views and data filters like the Project Breakdown Dashboard.

3. Forecast vs. Invoiced Dashboard: Provides comparative insights into revenue forecasts and invoiced revenue, with customisable tables and graphics organised by selected data points.

Y Axis

By default, rows you will see are:

Row	Details
Total Forecast	This is the forecast for a project, the total of Proposal Forecast and Active Forecast.
Invoiced Total	This will show the invoiced totals, including applied credits.
Forecast Variance	This will show the percentage difference between the Total Forecast and Invoiced This will show as orange if the forecast is greater than 0, or between 0 and -15% This will show as red if less than -15%.

Resourced Charge	This will show the total charge as resourced to a stage of a project.
Actual Charge	This will show the actual charge as recorded from timesheets.
Resourced Variance	This will show the percentage difference between the Resourced Charge and Actual Charge. This will show as orange if between 0% and -15 This will show as red if less than -15%.

From the Show widget, you can select to include additional rows.

These include:

Row	Details
Proposal Forecast	This will show you the forecasted total of Stages with a Proposal status.
Active Forecast	This will show you the forecasted total of Stages with an Active Pending Invoice, or On Hold status.
Invoiced - Forecast	As the label suggests, this will show the difference of the Invoiced amount and the Forecasted amount.
Resourced - Actual	As the label suggests, this will show the difference of the Resourced Change and the Actual Charge.

X Axis

The X axis represents the months.

You will be able to filter which months are shown from the Date Selection.

By default, you will see +/- 3 months.

But you can change to the following:

- +/- 6 months
- Next 6 months
- Last 6 month

Additional Features Across Dashboards:

Feature	Detail
Export	Select key data points for dashboard organisation, including office, project type, cost center, and discipline.
Filtering	Filter displayed months for data analysis, with options ranging from the last 6 months to the next 6 months.
Sort & Exclude	Includes project search, weighted values, and the option to add additional rows for deeper insights.

Edition Availability:

- The Forecasting Dashboards are exclusively available to Analytics Plus subscribers.

2. Invoice Notes:

We've added Debtor Notes to the side action pane for Invoices, as well as introducing two new Note Types:

- General Notes
- Approval Notes

Note: Debtor Notes are only available for Finalised Invoices.

Action Pane

From the right action pane, we've made the following features available:

- Create and edit a Note.
- You can leave a Comment for any Note.
- You can set a Note as inactive.

Additionally, for a Debtor Note, you will also be able to:

- Create a To-Do
- See Related Info

Add a Note

You can add a Note by clicking 'Add Note' from the Action Pane.

You will be required to select a Note type and Enter a Note. You can also enter a Subject for the Note and enter any tags.

Note: There is a 5000 character limit for Debtor Notes, and 1000 for General and Approval Notes. Comments have a limit of 500 characters.

Organising Notes

You can sort and filter your Notes. By default, Notes are organised 'Newest to Oldest', but you can also sort Notes 'Oldest to Newest'.

By default, Notes are filtered to 'All Active' Notes. You can also filter your Notes by:

- Debtor Notes
- General Notes
- Approval Notes
- All Inactive Notes

Edition Availability

Function	Professional	Business	Enterprise
Access Debtor Notes in Action Pane	✓	✓	✓
Access General and Approval Notes	✓	✓	✓

Note Permissions

We've exposed more options for Notes to the Security Matrix.

Financial Notes

These permissions control who can access Notes from within Invoices and Purchase Orders. They include ability to:

- Read Notes
- Add Note
- Edit Others' Notes
- Delete Others' Notes

Project Notes

These permissions control who can access Notes for Project, Stage, and Task Notes. They include ability to:

- Read Notes
- Add Notes
- Edit Others' Notes
- Delete Others' Notes

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Admin	Admin
Read Financial Notes		✓	✓	✓	✓	✓
Add Financial Notes		✓	✓	✓	✓	✓
Edit Others' Financial Notes						✓
Delete Others' Financial Notes						✓
Read Financial Notes	✓	✓	✓	✓	✓	✓
Add Financial Notes	✓	✓	✓	✓	✓	✓
Edit Others' Financial Notes						✓
Delete Others' Financial Notes						✓
Read Other Notes	✓	✓	✓	✓	✓	✓

Note: You can always edit your own notes

3. Custom Stage, Task, and Milestone Colours:

We've added Custom Colours to Stages, and Task Pills and Milestones Icons, and provided the ability to change these colours from the Schedule, Project Planning, Work Breakdown, and action panes.

Functionality in the Planning Boards remains the same, so the Synergy that you know and love is still there, just with more customisable options for tailoring your projects to your needs.

Custom Colours are applied at a project level, meaning that all users will see the same colours that have been applied to a single project.

Changing Colours

Changing Stage, Task or Milestone colours can be done via the new Colour Picker function.

To access the colour picker simply click on a Stage, Task or Milestone colour icon from the menu pane to open the Colour Picker.

The same functionality can be accessed by opening the Stage Resourcing action pane, clicking on the stage colour and selecting a new colour from the now open colour picker. This same functionality is also applied to the Task and Milestone action panes panes.

From the Work Breakdown, colours can be changed in a similar fashion vis the same colour picker and can be saved to a template for repeatability. Simply clicking on the respective stage or task colour will open the colour picker to select a new colour.

These colours were designed in accordance with the RIBA colour palate.

Personalising your view

If you do not wish to see projects and the custom-applied colours, viewing default Synergy colours at the user level is possible, and will not affect customisations at the project level.

To access this menu, select the gear icon in the left menu pane. Changing this option will only affect the Planning Board.

Disabling Colours for Your Organisation

Custom colours will be automatically enabled for your organisation.

You can disable this feature for your organisation from the Configuration settings page. Simply, uncheck the option for “Enable Colour Customisation”.

Legend

When custom colours in active a different legend will be available to view indicating the stylisation changes found in planning board pills while in use. When custom colours are turned off either from the configuration page or from the menu pane the default legend will appear.

Edition Availability

Function	Professional	Business	Enterprise
Enable Custom Colours for Planning Board			✓
WBS Custom Colours	✓	✓	✓

Default Permissions

Function	User	Assistant Project Manager	Project Manager	Director	Assistant Admin	Admin
Customise Stage, Task & Milestone Colours			✓	✓	✓	✓

4. Invoice Documents:

We've added a new Documents group in the Action pane for Invoices.

You can access up to 3 tabs from this group, including:

- Invoice
- Payment Application*
- Attachments

Invoice

The Invoice tab includes the actions previously available from the Invoice Document Preview, these features are now exposed to buttons.

These actions include:

- Version control
- Layout tools
- Upload DOCX
- Download DOCX and PDF

Clicking the document preview will still expand that preview so you can read it.

Payment Application

The Payment Application tab is only available for draft Invoices and for users with Enterprise.

This tab includes the actions previously available from more menu.

These actions include:

- Send
- Layout tools
- Upload DOCX
- Download DOCX and PDF

It also now included version control, and works the same as Invoicing.

Clicking the document preview will still expand that preview so you can read it.

Attachments

From the Attachments tab you can add and remove attachments to your Invoice.

This functionality remains the same, including a maximum limit of up to 10mb or 10 files, whichever you reach first.

Edition Availability

Function	Professional	Business	Enterprise
Invoice & Payment Application tab	✓	✓	✓
Attachment tab			✓

Additional Improvements

- **Invoicing -** We've added the capability to attach documents to a Draft Invoice, a feature initially only available to a Finalise Invoice.
- **Export Subscription Payments -** We've added a downloadable account audit from your Subscription page for System Administrators and above. This will include any subscription payments and credits applied and used.
- **Reporting** - We've increased the capacity of reports generated with Forecasting values from 40,000 records to 80,000 records.

Issues that have been fixed

- **Performance:** Fixed an issue where at the end of month some users might have noticed slow down for Invoicing and Transactions.
- **Analytics Plus Forecasting dashboards:** Fixed an issue where some invoices were not showing up if the cost centre was changed.
- **Project imports:** Fixed an issue where exported reports did not reflect a filter change.
- **Project imports:** Fixed an issue where custom rate groups entered on the project import sheet were defaulting to standard rate group.
- **Staff:** Fixed an issue where users could not be marked as paid by org if no free licenses were available.
- **Invoice templates:** Users can now add a bookmark for Previous Claims Foreign Currency in the Fee Details Table for the Invoice templates.

- **Projects** - fixed an issue where incorrect information was populating in the preview of the contracts
- **Schedule reports** - Increased org limits of scheduled reports to two per user
- **Invoicing** - fixed an issue where pre-bills were incorrectly calculated
- **Connectivity** - fixed an issue where Xero was not loading previews
- **Custom Reports**- fixed an issue where category rates were unable to be used in expressions
- **Notes** - Fixed an issue where debtor notes could not be created on imported invoices

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.