Synergy.Net Release Notes

System Administrators

Version 4.2 / Released September 2008

LEGEND Enhancement | Client request | Maintenance | New Feature | Favourite | Action

Synergy → Connect

Connect

Synergy is now compatible with the latest upgrades from MYOB and Quickbooks

refer to the PDF MYOB 0004 or Quickbooks 0005

The due date now transfers to the accounting software

Synergy → Practice

Staff

When terminating a staff member a dialog box will now appear "Would you like to de-activate staff login" and when changing a staff member from terminated to employed a dialog box will appear "Would you like to activate staff login"

Staff remuneration effective dates can be backdated

There is a new feature on the history tab that allows you to undo the last change to the remuneration

When terminating staff, creating staff and salary effective from the date now defaults to today

Synergy → Default Data

Attributes

Project attribute list items can now be sorted. Click the ⇅

Attribute types can now be changed if they have not been used

Synergy → Administration Tools

Document Templates

There are now more options for the fee table on grouping the rates detail section, including a grouping on item classification and name.

When changing between the different group by options the cells are no longer cleared, only the no longer valid bookmarks are removed

refer to the PDF 0003

The email address of the person who the invoice is 'Attention To' is now available as a bookmark on the template

Broadcast Messages

Select the minimum level of access required to receive the message. Tick the restrict box if ONLY this level of access is to receive the message

As messages are added, they can now be sorted. Click the ⇅

Security

All passwords (including the database connection) are now encrypted

Synergy → Tools

Prefix options

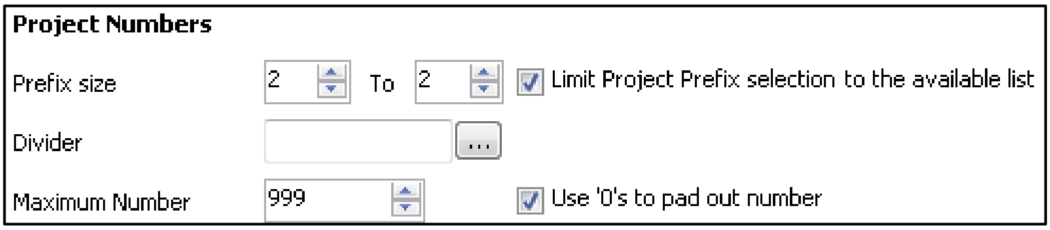
You can now set a prefix to automatically be assigned to new projects. The options are to use your existing prefix numbers ie 2008, SY08 etc OR to use the "Current Year". What this will do is automatically roll over to 2009

Tools :: Office Settings :: Projects

Custom project numbers

Previously prefix' were required to be 4 digits long ie 2008, however you can now set the prefix to just 2 digits ie 08. The counter can also be modified to single digits.

The project number **08036** would be set up with the following



Tools :: System Settings :: Projects :: Project numbers

Start and end times for timesheets

There is a new system setting to allow for the tracking and reporting of timesheet start and end times – Use start/end time entry

Tools :: System Settings :: Time and expenses

Unallocated costs

The 'Unallocated Costs' sub project is now optional to restrict it's availability when allocating timesheets, cash and travel expenses, office items and expenses (invoices/bills)

Tools :: System Settings :: Time and Expenses

Synergy → Projects

Expenses (Invoice/Bills)

Added a more descriptive error message when trying to disburse an expense to a sub project that has specific rates set but does not have the supplier or expense rate attached

Changing an expense's contact or description now refreshes on the project

Invoice maintenance

When entering the invoice maintenance screen search dates default to the last full month

The project number field in the invoice maintenance search module now accepts more than 8 characters

Credits

Residual now reflects credits that have been created when the fee type is set to hourly/cost rates

Resolved the use of the custom credit numbers not being applied to new credits and invoice cancellations

Synergy → Reports

Custom reports

Custom reports created by other users can now be removed by system administrators

Debtor notes

New filters are available on the note fields of debtor notes

Synergy → Contacts

Auto allocate card IDs

New system setting to allow for auto generation of contact card ID's when a new contact is created in Synergy. Set length of the card IDs. This is handy for clients using MYOB or Quickbooks Connect so there is not as much emphasis on the names matching in the 2 systems. View these within a Contact record on the lower left hand side

Tools :: System Settings :: Contacts